

RadioCentre
SHAPING COMMERCIAL RADIO'S FUTURE

**Submission to the BBC Trust Service
Review of Network Music Radio
(Radio 1, Radio 2, Radio 3,
6 Music, 1Xtra, Asian Network)**

October 2014

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EXECUTIVE SUMMARY

- 1.1 **RadioCentre welcomes the fact that the BBC Trust is considering all BBC's music radio services together in this service licence review.** This provides an opportunity to consider the complementary roles of these services, as well as the combined impact of the entire BBC music radio portfolio and its offer to listeners
- 1.2 **Our overall assessment is that the BBC makes a valuable contribution to music radio,** but it needs to be held to account more firmly against its public service remit. Peak hours in particular are largely devoted to popular music programmes and are not providing sufficiently distinctive content for listeners. Public service content is scheduled mostly in off peak hours.
- 1.3 Independent consultants BDRC Continental were commissioned to assess listener perspectives on the output of Radio 1, Radio 2 and Radio 3. They found that **the most high value and unique BBC content is not making enough impact on listeners.** For example, only 1 in 3 (35%) of Radio 1 and 2 listeners said that they thought the stations inform and educate the public, with low association for specific obligations like documentaries or social action (6% for Radio 1) and comedy (14% for Radio 2).
- 1.4 This is a missed opportunity and a poor return on the very substantial investment of licence fee payers' money. **We argue for a shift in priorities within BBC music radio so it can deliver much more effectively on its public service mission,** by providing more of its unique content to daytime audiences.
- 1.5 **We also call on the Trust to ensure that the main BBC music services serve distinct audiences.** Radio 1 should continue efforts to reduce its average age; Radio 2 must do more to serve older listeners, with the station's target audience being changed from 35+ to 45+; and Radio 3 should avoid duplicating what listeners can already find in the commercial sector.

Section 1 - Key themes

• Music output

- 1.6 BBC music radio stations have a responsibility to bring the broadest possible range of music to their audience. This is done effectively on digital networks like 6 Music and 1Xtra, and through specialist shows on Radio 1 and Radio 2 (and Radio 3). However, most of the music on Radio 1 and Radio 2 in weekday daytime is played elsewhere on commercial radio (our research found a 60% duplication rate). If the BBC is to fulfil its public service role in music radio effectively **most music tracks on BBC radio in daytime should not be played on commercial radio.** In fact a higher proportion, nearer to two-thirds of tracks, would more clearly differentiate these stations.

• Speech output

- 1.7 The speech output of BBC music radio services ranges from news and current affairs, to documentaries and social action. It is often of high quality and can be of genuine public service. Unfortunately the BBC is failing to make the most of this content, and as a result listeners do not associate the stations with this output. This should be addressed in part by a **requirement on all BBC music radio stations to repurpose high-value speech content and broadcast more of this in peak time.**

- **Market positioning and cross promotion**

1.8 The BBC's share of the UK radio market continues to be extraordinarily high (increasing from 50% in 1999 to 55% in 2013). Much of the growth through the 2000s was driven by its strong presence in the 25-44 age bracket, which is so crucial to advertisers (and therefore commercial radio). The marketing and cross promotion of BBC music radio services, highlighting mainstream music and speech, has supported this expansion. We propose **a shift in the focus of cross promotion of BBC content, away from generic promotion**, along with a tightening of the BBC Code on Cross Promotion.

- **Value for money**

1.9 It costs around £150m to produce content on six BBC music radio stations, compared to around £75m for producing content on 335 licensed commercial radio stations. This disparity is hard to justify unless BBC stations produce public service content across the schedule. Our contention is that to better serve the licence fee payer, there should be **more transparent budgets and a clearer relationship between funding and delivery of public service content**.

Section 2 – Analysis of BBC music radio services

1.10 We provide detailed comments on each BBC music radio service. Within these sections we assess their effectiveness in delivering the BBC's public specific purposes; their performance against service licence conditions; and how these might be improved.

- **BBC Radio 1**

1.11 Radio 1 has a vital role to play in providing radio content that is relevant to young people. It has shown signs of improvement on this issue, so **it would be a mistake to replace or remove the current requirement to reduce the average age** of the station. It should also be subject to more stretching requirements on the distinctiveness of its music and speech output in daytime; consider ways to increase the impact of its news output; improve diversity in its presentation; and the Trust should demonstrate clearer oversight of its online activities.

- **BBC Radio 2**

1.12 Radio 2 has consolidated its mass market position across all age groups, partly because it has not been subject to sufficient oversight or specific service licence conditions, and been allowed to skew its content to a younger audience. It is time for this to be reversed. Radio 2 should be required to fulfil its obligation to '*protect the interests of older listeners*', as set out by the Trust in its last review. As such, **Radio 2's age remit should be increased to those aged over 45 and it should be set a target of increasing average age of its audience for the next 5 years**. It should also be subject to more stretching requirements on the distinctiveness of its music output in daytime, alongside higher news and speech elements; a clearer commitment to regular comedy programming and social action; and an obligation to adapt off-peak speech output for peak time broadcast.

- **BBC Radio 3**

1.13 Radio 3 has made a number of programming changes in recent years, in order to try and become 'more accessible and welcoming'. This approach has led to a reduction in distinctiveness as it becomes more like its commercial rival, Classic FM. **It is surely not in the**

interests of licence fee payers for Radio 3 to adopt programming practices from the commercial sector. Instead it should fulfil its licence obligation to *'expose listeners to new and sometimes challenging material they may not otherwise experience'*, by adapting its broad range of content such as world music, drama, arts and religious programming and incorporate this is daytime as appropriate

- **BBC 6 Music**

- 1.14 The range and diversity of the output on 6 Music means that it fulfils an important role. However, a reduced focus on mainstream artists during peak time is required, along with an end to the distorting impact of its dominant role in covering UK music festivals. We suggest modest changes to the station to ensure a **more appropriate balance between new music and archive content.**

- **BBC 1Xtra**

- 1.15 1Xtra has proved that it is possible for a BBC music radio station to serve a young target audience. However, **it should be required to monitor distinctiveness of its music output and provide a greater commitment to news and current affairs during daytime**, in a manner relevant to its audience.

- **BBC Asian Network**

- 1.16 Asian Network has lost some of its most distinctive output, following a reduction in resources. We believe that it should address this by doing **more drama and minority language programming and be required to target Asian listeners aged over 40.**

Section 1: Key issues

- ❖ Music output
- ❖ Speech output
- ❖ Market positioning and cross promotion
- ❖ Value for money

MUSIC OUTPUT

- 2.1 BBC Radio has been at the forefront of UK music and culture since the services began broadcasting in 1922. This legacy, combined with the BBC's privileged access to the lion's share of broadcast spectrum, has helped BBC music services dominate the UK radio market.
- 2.2 Licence-fee funded BBC music radio services have much higher content budgets than their commercial competitors, so have an ability to experiment and a responsibility to bring the broadest possible range of music to their audiences. In contrast commercial radio stations tend to operate a tighter playlist, due to the requirements of their Ofcom format, commercial pressures and a need to provide a point of difference to their BBC counterparts.
- 2.3 In preparation for this review, RadioCentre commissioned two separate pieces of independent research to evaluate the types of music being played on BBC music radio, and how this was being perceived by BBC audiences. Radio playlist monitor CompareMyRadio was asked to examine the amount of unique tracks being played by each BBC station over 3 months. Separately we appointed research company BDRC Continental to ask 2,000 BBC music radio listeners about what they were hearing from BBC services.
- 2.4 **The research shows that music on BBC Radio is not as distinct as might be expected.** Research undertaken by CompareMyRadio shows that music on BBC stations can be varied and diverse at times. However, the majority of music on the most popular BBC services has considerable crossover with commercial radio, especially in daytime. Only 40% of tracks played on Radio 1 during weekday daytime are *not* played on commercial radio (a 60% duplication rate). Similarly, while 45% of music on Radio 2 across a full week is not being played on commercial radio, this falls to 40% during weekday daytime (and as low as 20% for some shows).
- 2.5 **BBC audiences want services to be distinctive, but many do not think they are.** Of the 2,000 BBC Radio 1 and BBC Radio 2 listeners surveyed by BDRC Continental, 77% agreed that BBC Radio has a responsibility to be distinctive to commercial radio. However, less than a third of listeners to Radio 1 (32%) and only half of listeners to Radio 2 (54%) thought that these services were actually different to commercial radio services. Instead listeners pointed to the similarities in music tracks and artists they heard on all services, primarily due to the tendency of the BBC stations to play popular chart music, particularly during peak times.
- 2.6 **Similarities exist mainly due to types of music played during daytime.** In our analysis, a common pattern emerged across all BBC services that the most unique and distinctive music was played in off-peak times. From CompareMyRadio statistics, 80% of tracks on Radio 1 were unique at night time, but only 40% during daytime. 88% of night time tracks on 6 Music were not played anywhere else, but this dropped to 69% during the day. While the BBC plays unique and specialist music, it does this mainly in off-peak, when listening is low, and therefore listeners generally do not sample or appreciate this music.
- 2.7 **The Trust should ensure that the majority of individual tracks on BBC stations are unique from commercial radio during weekday daytime,** with the intention of driving this differentiation still further (up to two-thirds) as a means of extending choice and diversity. The reason listeners perceive BBC Radio and commercial equivalents to be similar is likely to be because of the music playlist at peak times. While it is indisputable that BBC Radio plays a wide range of music genres and tracks throughout the week, it does not do this to such an extent during daytime when the vast majority of listeners tune-in.

- 2.8 **Music radio is facing increasing competition, and BBC Radio has a responsibility to be at the forefront of defining its unique offering.** Radio has managed to retain large audiences, but people are listening for less time. Increased competition from a proliferation of new media devices, most specifically personal music streaming services, means that the time individuals spend listening to radio is decreasing. BBC Radio, and particularly Radio 1, needs to lead the way by using its creativity and innovation to differentiate itself to this competition and ensure that radio continues to be a passion for millions in the future. This means emphasising radio's well known role as curator of and introducer to new music, instead of playing well known tracks and mainstream artists that are readily available on commercial radio.
- 2.9 Music on the BBC has a wider role than just radio. While the opportunity to comment on all music radio services together is appreciated, we believe the Trust should look further at the wider impact of BBC Music. While the governance of radio services is currently laid out in service licences, there is no accountability for proprietary systems like BBC Playlist, spin-off products like iPlayer Radio, or even how BBC Music manages its presence on third-party sites like YouTube. **RadioCentre believes the lessons learned in this review should be used to consult on the BBC Music brand as a whole, with the ultimate aim of an overarching service licence for the BBC Music brand.**

Music output recommendations

- The Trust should ensure that the majority of tracks on individual BBC music stations are distinct from commercial radio during weekday daytime (7am – 7pm), with the intention of driving this up still further (to two-thirds)
- The Trust should consult on the BBC Music brand as a whole, with the ultimate aim of an overarching brand service licence for BBC Music

SPEECH OUTPUT

- 3.1 In a world of music streaming services where the public can programme the music they want, non-stop music radio will be difficult to sustain in the long term. It is the speech output on BBC Radio which will deliver much of its distinctive content - making the range and depth of speech on BBC Music stations just as important as the music offering.
- 3.2 Speech needs to be rich and diverse on BBC music radio so that services continue to be accountable to their audiences and the BBC's public service mission. In order to better understand the types of speech on the most popular BBC music radio services (Radio 1 and Radio 2) we commissioned independent monitoring of both services over weekday daytimes between 22nd-26th September 2014. Once again this was supplemented by the independent audience research undertaken by BDRC Continental.
- 3.3 **Radio 1 and Radio 2 are under delivering on high quality public service speech during daytimes.** From the monitoring of both services undertaken for RadioCentre by independent radio industry professionals, stations were not found to be broadcasting the amounts of regular arts coverage, scripted drama or comedy content which would be expected from a public service broadcaster. Although some speech output of BBC music radio services is of high quality and can be of genuine public service, the largest proportion of speech in daytime is taken up by general banter (38% of speech over the week on Radio 1, 20% on Radio 2) or entertainment features (18% on Radio 1, 10% on Radio 2).
- 3.4 **Audiences are also unable to identify public service output on BBC music radio.** Due to the proliferation of content without any public purpose, audiences do not associate BBC music radio with the speech requirements laid down by the BBC Trust. For example, Radio 2 has a service licence commitment to broadcast at least 170 hours of religious output each year, but only 16% of the listeners BDRC surveyed associated it with any religious programming. Similarly, Radio 1 has a service obligation to broadcast 40 documentaries per year, but only 6% of listeners associate Radio 1 with this content.
- 3.5 **Public value output is being pushed to the fringes of the BBC music radio schedule where it is not being heard.** Just as with music output, RadioCentre believes the audience does not associate distinctive speech content with these stations because it is being broadcast in off-peak when listening levels are low. This should be addressed in part by a requirement on all BBC music radio stations to repurpose its high-value speech content and schedule more of this in peak time.
- 3.6 **The established scheduling of public service programming in off-peak is not working.** The well-rehearsed argument used to justify this practice is that BBC Radio services need to establish daytime scale, so that listeners are then more likely to be exposed to output that meets the public purposes (even if it is delivered in the margins of the schedule). This 'ratings by day, reputation by night' strategy clearly does not maximise the reach of this output, and has failed to maximise the impact of higher value public service programming.
- 3.7 **The BBC could use its privileged position to experiment more with radio programming.** Audiences no longer consume radio in the same way they did, yet any comparison of today's schedules on BBC popular music radio with equivalents from decades previously shows little difference. While Radio 1 has invested a lot of resource in redeveloping its online offering, it still has the same daytime 2-3 hour DJ lead music show format and two 15 minute *Newsbeat* shows in the same low-reach slots as 10 years ago. While BBC One and BBC Two build peak-

time schedules around their unique documentaries and comedy shows, Radio 2 continues to have music-led male DJ programming.

- 3.8 **Public service content needs to be repackaged for daytime listeners.** Commercial broadcasters understand that different types of audiences require different approaches to programming. While we do not expect long-form documentaries to be scheduled every day at breakfast time, there is no reason why an edited version of off-peak programming could not be repurposed for a peak-time audience in a magazine style which works so well on BBC TV shows such as 'The One Show'. BBC Three also broadcasts documentary material in peak with series like Make Me A Muslim at 9pm and factual like Junior Paramedics at 8pm.
- 3.9 **BBC music radio should broadcast more regular public service speech output.** More consistent and regular public service content could take several forms. There should be repackaged daily slots for documentary content at times when audiences can find it; news and current affairs content should be summarised more regularly during peak-times as bulletins; and there needs to be greater recognition of public service requirement among BBC production teams, so that the amounts of general non-descript 'banter' are reduced.

Speech output recommendations

- The Trust should include service licence conditions that specify the level of peak time output
- The Trust should encourage BBC Controllers to make more radical changes to schedules to better reflect the way audiences now listen
- Arts, culture and current affairs content should be repackaged and repurposed for peak-time audiences

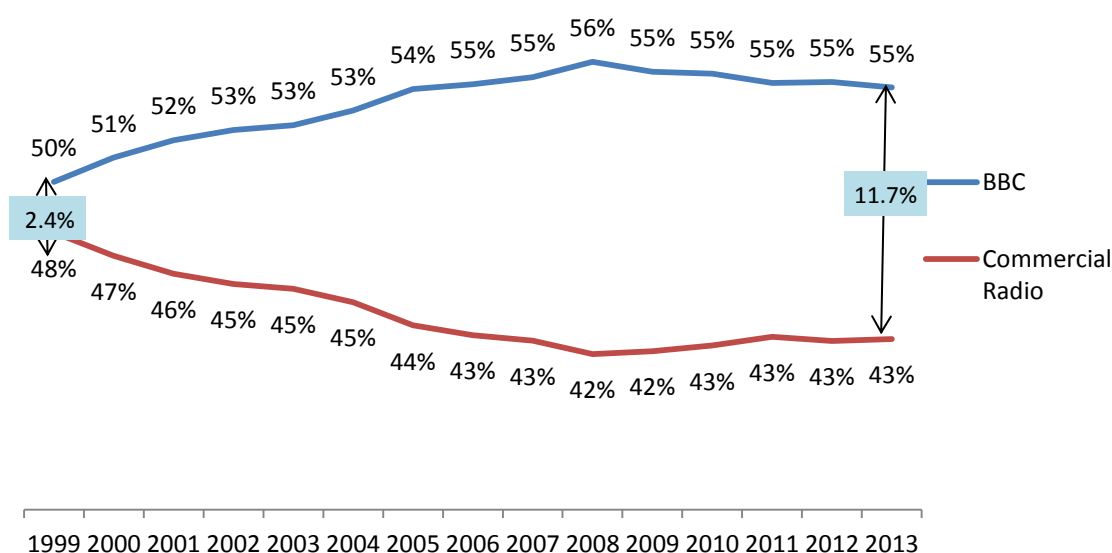
MARKET POSITIONING AND CROSS PROMOTION

- 4.1 Our analysis of the music and speech output of the BBC's key music radio services, along with the audience research we commissioned, demonstrates that much of the output of these stations is mainstream and targeted at a mass market audience (particularly during daytime).
- 4.2 In the case of the BBC's pop music services (Radio 1, Radio 2, 1Xtra and 6 Music), this leads to a portfolio of stations that super-serves listeners aged 25-44. This is a poor use of resources, as the significant level of investment required to support these services could fund a broader range of content, in order to serve an even more diverse range of listeners. It is also potentially damaging to commercial radio given the primary importance of this demographic to advertisers.
- 4.3 The positioning of these radio stations is supplemented by marketing and cross promotion on BBC television and radio, which focusses unduly on personalities, presenters and the most popular content. Therefore it is no surprise that listeners surveyed by BDRC failed to associate Radio 1 and Radio 2 with their public service remits, but were much more likely to associate the stations with mainstream music output and general entertainment.

- **Market positioning**

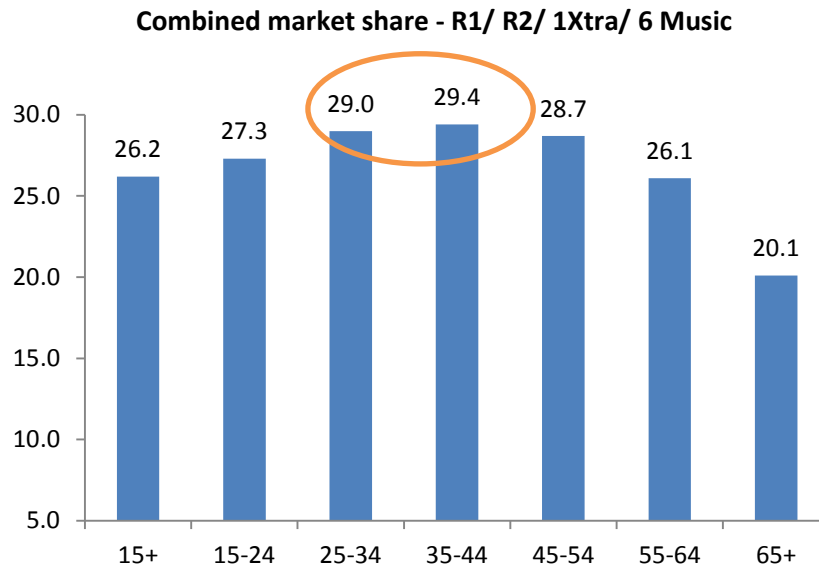
- 4.4 The BBC's overall share of the radio market remains at an extraordinarily high level, much higher than its share of any other media. While it has not grown further in recent years, it has consolidated its dominant position following strong growth throughout the 2000s, as both Radio 1 and Radio 2 shifted to a more populist approach. Between 1999 and 2013 the gap in audience share between BBC Radio and commercial radio grew from 2.4% to 11.7%.

Changes in audience share (15+) – 1999- 2013



- 4.5 The report from Prospero Consulting, which was commissioned by RadioCentre as part of this review, considers the impact of these changes in further detail. It concludes that, everything else being equal, the audience that migrated from commercial radio to the BBC since 1999 could have contributed to higher net revenues to the commercial sector of between £50-60m a year.

- 4.6 The shift in audience in the core 25-44 age bracket during this period was particularly dramatic, with BBC Radio eroding commercial radio's share significantly from 60% to nearer 50%. Much of this was driven by growth at Radio 2, and means that the collective listening hours to four BBC pop music services alone (Radio 1, Radio 2, 1Xtra, 6 Music) now constitute around 30% of listening by 25-44 year olds.



- 4.7 The appeal of BBC music radio to this 'heartland' audience is likely to be due to a number of different factors. The impact of the broad appeal of the daytime music and speech output is covered extensively elsewhere in this document, as well as in the report from BDRC Continental. However, we also believe that the scale and nature of the BBC's own marketing and cross promotion of its music radio stations plays a powerful role.

- **Audience perception**

- 4.8 The issue of advertising and cross promotion on the BBC was considered as part of the research undertaken by BDRC. As they indicate, the responses to these types of questions will depend heavily on what specific promotions have been running leading up to the time of the survey. For example, this research was undertaken in the month before the release of its star-studded performance of 'God Only Knows' as part of the promotion of BBC Music. Therefore the impact of this significant promotion was not included in the findings.
- 4.9 Nevertheless the research does highlight the significant level of awareness and recall of advertising and promotion of BBC Radio stations.
- 15% of Radio 1 listeners claimed to have seen some sort of advertising for Radio 1.
 - Awareness of promotion was lower for Radio 2 (8%).
 - In both cases this was second highest after ads for Heart, the only commercial radio network that has had significant advertising on commercial TV.
 - Nearly 60% of those Radio 1/ Radio 2 listeners who had seen an ad for BBC Radio, claimed they saw the adverts between BBC TV shows.

- A higher proportion of Radio 3 listeners (18%) claimed to have seen some sort of advertising for Radio 3 – with 71% of these listeners having seen this on television.
- 4.10 There was a higher level of recall of advertising and promotion for other BBC shows on BBC Radio.
- Over a third of listeners claim to have heard other BBC advertising on Radio 2 (BBC Proms and Proms in the Park being the most commonly mentioned during the time of the survey).
 - 32% of Radio 1 listeners claim they had heard advertising for other BBC shows on Radio 1 (Dr Who being the most commonly mentioned during the time of the survey).
 - 37% of Radio 3 listeners claim they had heard advertising for other BBC shows on Radio 3.
- **Cross promotion**
- 4.11 While it is right that the BBC ensures that licence-fee payers are aware of a broad spectrum of BBC programming, we do not consider the focus of much of its cross-promotional activities to be justified. There must be a strong public value justification for any such intervention and a consideration of the impact it has on the market. We suggest that cross-promotion activities must deliver directly against the BBC's public purposes, rather than focussing on promoting general entertainment programming (such as the Radio 1 and Radio 2 breakfast shows) or station personalities and presenters.
- 4.12 A distinction must be drawn between raising awareness of individual programmes and full-blown advertising campaigns for specific services. We believe that much of the BBC's cross-promotion of its radio services constitute advertising campaigns for the stations concerned, and are inappropriately focussed on programming which has little direct public value, or which competes directly with alternative offerings (e.g. the Radio 1 Chart Show), rather than content of significant public value.
- 4.13 In addition, the BBC should take care that its radio station brands are used appropriately and in keeping with its guidelines on editorial and fair trading practice. For example, we note that a recent BBC compilation album BBC Radio 1's The Nixtape (named after a weekly feature from the Radio 1 breakfast show) made extensive use of the BBC brand. This is despite the fact that it did not contain content originated from the BBC but was simply a compilation of commercial music tracks. This would appear to be a breach of section 4.17 of the BBC Fair Trading Guidelines regarding the use of BBC brands, which states '*permission will only be given when: the goods or services are derived predominantly from the output of the BBC Public Service Groups*'.
- 4.14 Greater consideration should also be given to the use of BBC brands to promote commercial products and in cross-promoting the BBC content across other BBC networks. We note that the BBC Trust's competitive impact code on cross and digital TV promotion is designed to ensure that cross-promotions do not prejudice fair and effective competition¹. Within this code, the BBC Trust identifies three particular types of promotion that it believes could give rise to concern – the promotion of programme-related materials, commercial services and particular digital platforms/services. The undue promotion of the BBC's own radio and television services are not considered within the BBC Cross Promotion Code, which as we have argued previously, is a serious omission.

¹ BBC Trust, [Fair Trading Policies and Framework](#), November 2011, p.23.

- 4.15 We are also aware of the upcoming BBC Music Awards on 11 December this year. Despite assurances that this would be a 'totally different concept'² from the Brit Awards, the line-up of artists, featuring One Direction, Coldplay and Ed Sheeran among others, seems remarkably similar. We are also aware that this event will be covered on prime time BBC 1 and offer a significant cross promotional opportunity for Radio 1 and Radio 2. Using such events for general cross promotion or advertising for BBC music radio stations should be avoided. Therefore we will be monitoring this event closely and urge the Trust to do the same.
- 4.16 The recent BBC Music launch is also an interesting case study. Our understanding was that the key reason for the creation of BBC Music was to provide an umbrella brand for music content already provided by the BBC. It was presented as a better way to describe and present this existing content to licence fee payers. This is consistent with the approach we are advocating for BBC Radio's specialist programming. It exists already, it is of high quality, but research shows that listeners are unaware of it. Therefore this is where the BBC's marketing effort should be focused.

Market positioning recommendations

The BBC should better harness the power of its most popular television and radio services to promote public service programming that would otherwise gain little exposure, by ensuring that:

- Cross-promotion should be used only to promote programming which has particular public value, and which does not compete directly with programming provided elsewhere (such as the Radio 1 chart show)
- Cross-promotion should *not* be used to promote the BBC's most popular content (such as the Radio 1 or Radio 2 breakfast show) or for generic promotion of an already popular BBC service
- The amount of cross-promotion devoted to individual services should always be proportionate and monitored by the BBC Trust
- The BBC Trust competitive impact code on cross and digital TV promotion must be amended to include guidance on how the BBC channels should promote other BBC public activities (reflecting the above requirements)

² Jason Deans, ['BBC to launch music awards to rival the Brits'](#), *The Guardian*, 16 June 2014.

VALUE FOR MONEY

- 5.1 Following the last licence fee settlement in 2010, the BBC committed to savings of 20% (or £700m) in annual expenditure. As a result, all BBC Radio services have been required to make efficiency savings and cuts in expenditure. However, the headline spending on the services does not appear to have been greatly affected, with Ofcom³ estimating that the BBC receives a total of around £713m to spend on its 59 radio stations (up from £644m in 2008).
- 5.2 In contrast commercial radio is generating net revenues of £454m spread across 335 licensed commercial radio stations (although it would be misleading to compare this figure directly, due to the cost of sales, marketing and commercial production that also apply to commercial radio stations).
- 5.3 The drive for greater cost savings in BBC Radio since 2010 is welcome but overdue. The generous budgets allocated to its services had been expanding still further in recent years, despite concerns regarding the level of public service value from stations like Radio 1 and Radio 2. This issue is covered in more detail in a report by Prospero Consulting, commissioned by RadioCentre, which provides further analysis of these changes in overall radio income and audience between BBC and commercial radio (and the impact of these changes).

• **BBC Music Radio**

- 5.4 The breakdown of costs listed in the BBC annual report for its music radio services are provided below. We understand that these figures include a number of central costs of operating as part of the BBC, which are not at the discretion of the individual Station Controllers, as well as costs of music rights and broadcast distribution costs. However, they are the best publicly available source of information on the cost of running BBC music radio.

	Content	Distribution	Infrastructure / Support	Total
Radio 1	40.2	5.8	6.8	52.8
Radio 2	47.8	5.7	7.3	60.8
Radio 3*	40.8	5.8	10.1	56.7
1Xtra	5.6	1.6	2.6	9.8
6 Music	7.9	1.6	2.5	12
Asian Network	6.6	1.8	2.4	10.8
TOTAL	148.9	22.3	31.7	202.9

*Excludes £27.9 costs of BBC Orchestras Performing Groups (£22.8m on content, £5.1m on infrastructure/ support)

- 5.5 When the costs of BBC Orchestras and Performing Groups (which fall under the auspices of the Controller of Radio 3) are included, the total cost of BBC music radio comes to £230.8m. Even when considering the cost of content and production alone, these sums seem extraordinarily high to those operating radio stations in the commercial sector.

³ Ofcom, [The Communications Market 2014: Radio and Audio](#), August 2014, p. 209.

- 5.6 Crucially, the spend on content for these six radio stations (£148.9m), is double the amount that all 335 licensed stations in the commercial radio sector are estimated to spend on content (£75m). While it is a crude comparison, this equates to an average spend on content of almost £25m for each BBC music radio station, compared to £224,000 for each licensed commercial radio station – an average spend on content that is more than 100 times greater.
- 5.7 Clearly this comparison is just indicative. Commercial stations are organised very differently from their BBC competitors, with a different range of regulatory obligations and cost pressures (most obviously the cost of advertising sales). However, even taking these factors into account the disparity between the running cost of commercial radio stations and BBC Radio is considerable.
- 5.8 That said, we should be clear that **RadioCentre is not arguing that BBC Radio funding should be cut to the level of funding available to commercial radio**. Our concern is that this public investment is spent effectively and efficiently on the delivery of distinctive music radio output, which cannot and is not produced by the commercial sector. By that measure, the licence fee payer is not currently getting value for money.
- 5.9 We recognise that the main national networks such as Radio 1, Radio 2 and Radio 3 all have a number of expensive strands of output, including their commitment to live music, news and current affairs, documentaries and specialist programming. It is precisely this programming we would like to see them investing in and featuring more prominently. However, it is not immediately apparent why they incur such a high spend on their output, even compared to other BBC music stations. For example, while there are obviously some differences in the service licence conditions, it is not clear how the BBC justifies a content spend for Radio 1 that is five times that of 6 Music (or in the case of Radio 2, six times the spend of 6 Music).
- 5.10 We do not know the detailed cost base of BBC Radio, but it does seem that the areas where there is the greatest investment in talent are the areas that are required to deliver the least in terms of serving the BBC's public purposes. While the precise figures are not available, previous studies of the relative spend on the breakfast show and drive-time for Radio 1 and Radio 2 show on 'staff costs' have been shown to be considerably higher than any other radio station at those times, representing around 75% of the cost on the network's most expensive programmes⁴. Yet, as we have identified elsewhere in this submission, these shows deliver principally mainstream music and entertainment rather than particularly rich public purpose output.

- **Measuring efficiency**

- 5.11 Understanding the disparity in spending between BBC services is not helped by a lack of transparency on the cost of delivering the BBC's public purpose requirements, and a preferred efficiency measure of 'cost per listener hour', which creates perverse incentives to grow audience share, as oppose to deliver public value.
- 5.12 Due to growth in audience in recent years, large stations have been able to claim that they cost listeners very small amounts (1.1p an hour for Radio 1, 0.5p an hour for Radio 2). Yet these claims are not based on improved efficiency, but growth in audience hours. Therefore we continue to believe that this is a poor metric, as it implies that the absolute cost of the service is irrelevant if it is able to produce a very high level of listening.

⁴ National Audit Office, 'The efficiency of radio production at the BBC', January 2009, p.10-11

5.13 This approach incentivises BBC radio services to drive listening hours (often at the expense of commercial competitors), but fails to consider the fundamental question of how much money a radio station needs in order to deliver its public purposes to its target audience. What would be more useful would be a greater understanding and transparency of the costs incurred in delivering the constituent parts of the service licence, to help BBC music radio stations to focus on their mission to deliver the public purposes.

- **Audience perception**

5.14 RadioCentre was interested in seeking the views of listeners on value for money of BBC music radio services. Therefore as part of the audience research we commissioned with BDRC Continental, 2,600 BBC listeners were asked to rank radio stations in terms of how much they cost to run.

5.16 For Radio 1 listeners

- 67% of respondents ranked Radio 1 as the most expensive to run
- About half (48%) estimated that it costs less than £10m a year to run
- On average estimate the estimated cost of running Radio 1 was £16m a year
- Therefore **listeners underestimate the annual cost of running Radio 1 by £24m**

5.17 For Radio 2 listeners

- Only 17% of the respondents ranked Radio 2 as the most expensive to run (39% ranked it as second most expensive after Radio 1)
- Half of the respondents (50%) estimated that it costs less than £10m a year to run
- On average, the estimated cost of running Radio 2 was £15m a year
- Therefore **listeners underestimate the annual cost of running Radio 2 by £32m**

5.18 For Radio 3 listeners

- Only 15% of respondents thought Radio 3 was the most expensive station to run
- Slightly over half (52%) estimated that it costs less than £10m a year to run
- On average, the estimated cost of running Radio 3 was £17m a year
- Therefore **listeners underestimate the annual cost of running Radio 3 by £25m**

5.19 In terms of assessing value for money itself, after we told our survey participants the true operational costs of the networks, the audience appears to be split, which is surprising bearing in mind that this was a survey of regular listeners, who would be expected to score these radio stations as higher than average on value for money.

5.20 However, for Radio 1 and Radio 2 there were notable differences in perceived value for money between light/ daytime listeners and heavy/ evening listeners. For example the proportion of Radio 1 listeners who say it is excellent value for money rises from 10% to 16% with heavy listeners. Similarly, the proportion of Radio 2 listeners who say it is excellent value for money rises from 9% to 15% for heavy listeners. These figures are also higher for those people who listen after 7pm in the evening. **This implies that the BBC's most satisfied listeners are those who are exposed to the broadest range of its content.**

5.21 As the Trust will appreciate, this is a theme that runs through this document, as it is clear to us that a more creative approach to scheduling of the BBC's public value content would provide the best value – and be a win-win for the BBC, its listeners and future of radio in the UK.

- **Future approach**

- 5.22 BBC music radio stations are provided with these significant levels of funding in order to provide a range of output for listeners, which is significantly different from commercial competitors. Conceptually we continue to support this approach, and appreciate that this is likely to lead to a disparity in funding between the BBC Radio (due to the range of requirements it is obliged to deliver in its service licences) and commercial radio. Therefore, **while we support calls for the best possible value for money, greater transparency and a wider range of performance metrics, we are not arguing for a reduced licence fee or less funding for BBC radio.**
- 5.23 That said, in order to justify this investment BBC music radio needs to deliver a broad range of ambitious programming across the schedule, which the commercial sector cannot provide. **The scale of the disparity in funding cannot be justified if there is a significant overlap between BBC music radio and commercial radio,** with large proportion of listeners unable to tell the difference.
- 5.24 At present, it is at least questionable whether BBC Radio services are doing enough to fulfil these criteria and justify the level of public funding they receive. Our proposed response to this is not simply to reduce the investment in these services still further. Instead we have sought to emphasise the public service role of BBC music radio and call on the Trust to consider better ways to reflect the cost of delivering this.

Value for money recommendations

- BBC Radio service budgets should reflect the cost of delivering different elements of the public purposes
- The Trust should seek to make an independent assessment how much money is actually needed to deliver the public purposes

Section 2: Analysis of BBC music radio services

- ❖ BBC Radio 1
- ❖ BBC Radio 2
- ❖ BBC Radio 3
- ❖ BBC 1Xtra
- ❖ BBC 6 Music
- ❖ BBC Asian Network

Previous Trust recommendations	Current status
Radio 1 to maintain its reach to 15 to 29 yr olds	Not achieved. Reach and % reach have fallen.
Median age of Radio 1 listeners to remain within its target age range (15 to 29)	Not achieved. Median age is 30 (mean age is 32 for listeners 10+)
Radio 1 should be more ambitious in its speech output and delivery of the public purposes	Limited evidence of this in peak time, some evidence off peak
Disparity in reach to listeners from different ethnic backgrounds should not grow	On-going. Disparity has not grown further
Increase volume and ambition of social action output	Some good examples, but impact could be improved by scheduling and cross promotion
Tighter definition to ensure commitment to new music	High levels of new music and unique tracks in evenings – but majority (60%) of daytime weekday music played on commercial radio

- 6.1 In the previous service licence review of Radio 1 in 2009, the Trust stated that it expected the station to '*renew its focus*' on serving a young audience of 15-29 year olds, while the station's speech content should be more ambitious, providing more than just cultural commentary, listener interaction and interviews⁵.
- 6.2 Despite changes in consumer behaviour and radio listening habits in the intervening 5 years, we believe that these objectives remain relevant and are useful strategic guidance for Radio 1. More importantly, both of these areas are work-in-progress and require further attention from BBC management and the Trust.
- 6.3 In particular, **Radio 1 is still failing to deliver for the age group it is meant to be serving.** The station has a unique opportunity to attract young audiences to radio with a diverse and challenging range of music and speech. While progress is being made, its average age remains at 32 and 55% of the Radio 1 audience is still older than 29. This is still significantly older than BBC 1Xtra and a number of national commercial radio youth orientated services, which clearly show it is possible to operate large radio stations with a younger average audience.

- **Radio 1's responsibility to reach young audiences**

- 6.4 **Radio 1 plays a vital role for both the BBC and radio industry, in ensuring that the medium and its content stay relevant to young people.** Radio is a habit which often turns into a passion with age. Evidence suggests that young people who do not listen to the radio do not suddenly switch on as they get older, and that the current trend is for young people to listen

⁵ BBC Trust, [Service Review Younger audiences: BBC Three, Radio 1 and 1Xtra](#), June 2009, p. 4.

for a shorter period of time. Rajar data highlights those listeners aged 15-24 listen for 2 hours 18 minutes per week less in 2013 than they did in 2008, a fall of 12.9%⁶. The work of Radio 1 is crucial in reaching these young audiences across a number of platforms.

- 6.5 When he was appointed, Radio 1 Controller, Ben Cooper, acknowledged that reaching young audiences must remain his priority: "the metric of success (for me) is going to be the average age"⁷. Evidence suggests that BBC management still has a long way to go to deliver against this objective. In the most recent quarterly results, the median average age of a Radio 1 listener was 30, while the mean average was 32 (for listeners 10+).
- 6.6 BBC management will point to the changing media habits of young people and the broader market trends, which make its current target challenging. For example, Ofcom research states that for 16-24 year olds, listening to live radio comprises less than a quarter of their time spent on listening activities; while personal digital music and streamed music now account for 60% of their listening time⁸. Nine in ten of those aged 16-24 now use music streaming services⁹, and the BPI claims that the number of tracks streamed in the UK has nearly doubled year-on-year (10.2bn in 2014 compared to 5.4bn at the same stage in 2013¹⁰).
- 6.7 Against this background, Radio 1 station management are reported to have said that the task set for them is 'impossible', and that "average (age) is a ridiculously blunt measure" which does not consider outliers such as "festival dads"¹¹. The inherent message is that the conditions in the licence for a radio service are incorrect and their work should be evaluated by measures outside of broadcast platforms (something the Radio 1 Controller has recently termed his 'get out of jail free card'¹²). Presumably this evaluation would include assessment of a broader range of elements to assess engagement with young people, such as the number of YouTube subscribers, Twitter followers or Facebook friends.
- 6.8 It is certainly true that the proportion of the Radio 1 audience outside its remit has steadily been increasing over the past 10 years, as illustrated in the chart below. However, the changes introduced since Ben Cooper arrived – predominantly changing the peak daytime talent line-up for younger equivalents – appear to have slowed this growth, even leading to a small reversal in 2013 as the proportion of 15-29 listeners increased.

⁶ Ofcom, [Communications Market](#), p. 235.

⁷ John Plunkett, ['Interview: Ben Cooper, controller of Radio 1, on getting younger'](#), The Guardian, 5 February 2012.

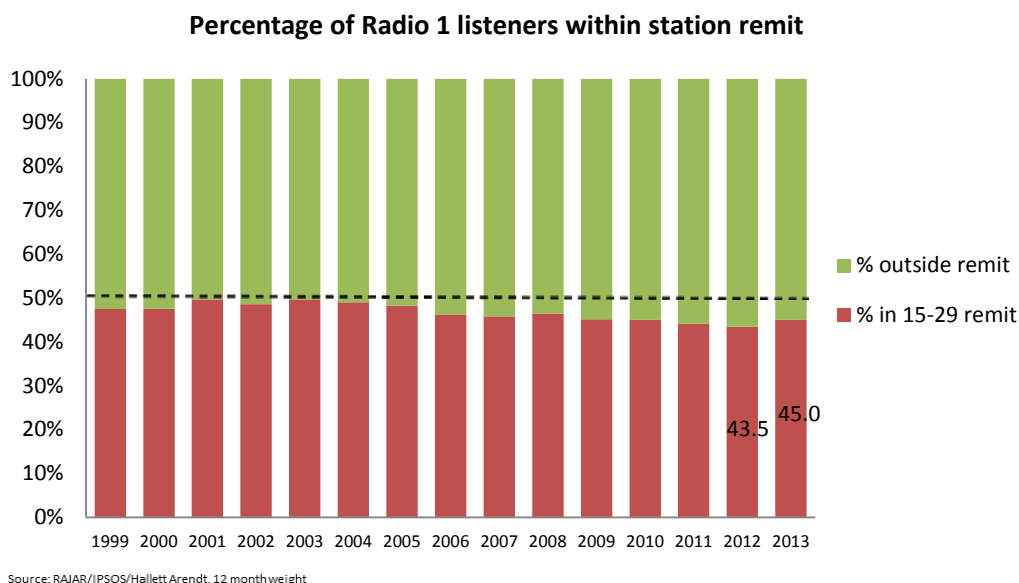
⁸ Ofcom, [Communications Market](#), p.214.

⁹ [Ibid.](#), p. 242.

¹⁰ Stuart Dredge, ['British music fans have streamed twice as many songs in 2014'](#), The Guardian, 9 October 2014.

¹¹ Nadia Khomami, ['Radio 1's playlist secrets uncovered: the battle of the 'brands''](#), The Guardian, 25 May 2014.

¹² Ben Cooper, ['BBC Radio 1 - Don't Just Count Our Listeners'](#), Huffington Post, 15 October 2014.



- 6.9 Clearly, **the broader listening trends for radio make the target for Radio 1 more challenging, but the evidence suggests that progress is being made.** In addition, there are significant opportunities for Radio 1 to improve its position by making further changes to its programming and positioning, so that this changes the perception of the station among listeners still further. According to our research, 38% of Radio 1 listeners aged over 30 said that they still think the service is aimed at people their age or older¹³. This demonstrates that more can be done to communicate the stations focus on young audiences.
- 6.10 Part of this strategy will inevitably involve greater online engagement, which will be essential to reach young audiences. However, we would be concerned if this led to the BBC gradually abandoning the priorities and obligations of its service licence on its free to air broadcast platforms (such as conditions on average age of the radio service). We also believe that while a full multi-media approach to Radio 1 as a brand is sensible, the service is licensed as a radio brand and this should remain the core focus.
- 6.11 The current video content Radio 1 is producing for YouTube is well used and appeals to its target audience. However on almost every video there is little or no attempt to link this to the broadcast radio station. There is no mention of what time a show is broadcast, or how to tune to the radio station. To take *Live Lounge* content as an example, the in-video branding only refers to the 'Live Lounge' – there is not even a Radio 1 logo – presumably so the material can be made available in other territories. The real purpose and value of Radio 1's online offering is therefore questionable.
- 6.12 More importantly, it is Radio 1 service licence that determines the key conditions that it is required to meet. This should not be usurped and side-stepped by a broader range of metrics for other activities, which while important, remain secondary to the radio service at this point. As the Controller has said on a number of occasions, the radio service remains 'the train that pulls the carriages'. Therefore the **conditions of the service licence should be focussed primarily on the performance of the radio service, including a continued focus on average age.**

¹³ Appendix A: BDRC Continental, *BBC Radio 1 & 2 Audience Research*, October 2014, p. 41.

Service licence recommendations

- Radio 1's median target age should remain 15-29 and it should be required to prioritise this condition
- The use of additional metrics of audience engagement should be supplementary to this and not seek to replace the target age demographic of the radio service

Stimulating creativity and cultural excellence

6.13 Music is rightly at the core of Radio 1 output. The station has helped to launch the careers of countless bands and artists who have gone onto international success. These traditions are maintained in the primary purpose of the current service licence, which states that 'it should offer a range of new music, support emerging artists – especially those from the UK'¹⁴.

6.14 Today Radio 1 competes against a proliferation of music providers for young audiences – from iTunes to Spotify to YouTube– and the station has sought to compete with these new players on every platform available. However, despite all this new competition, when it comes to music policy Radio 1 continues to compare and contrast itself predominantly with UK commercial radio.

• Music

6.15 With the station under increasing scrutiny approaching licence review, Radio 1 management have consistently advocated the strength of their music playlist in comparison to individual commercial stations. Most specifically they have focused on Capital FM¹⁵; a station which has a format from Ofcom to play contemporary chart music (i.e. Top 40 records). We do not believe that this comparison is meaningful or sufficient, given the requirement on Radio 1 to 'provide a significant platform for new music and emerging UK artists across a wide range of musical genres'¹⁶.

6.16 In our research of Radio 1 listeners, nearly half (46%) thought that Radio 1 was the same or only slightly different to Capital FM. This may be due to the music played on both stations. On being played the top 5 tracks played on Capital FM in September, 60% of the Radio 1 listeners surveyed said that they would most associate this music with the BBC station¹⁷. This evidence suggests that listeners perceive Radio 1 to be more a top 40 station than one which promotes new music and emerging UK artists across a wide range of musical genres.

6.17 **Radio 1 prides itself on playing the newest and most distinct music, but this does not appear to be cutting through to the listener.** When asked about the types of genres of music available on Radio 1, the most common music genre was mainstream chart music; with 71% of respondents stating the station played that music. Indeed 39% of Radio 1 listeners surveyed believe the station plays the most popular music, which was actually 6% higher than the score for commercial radio¹⁸.

¹⁴ BBC Trust, [Radio 1 Service Licence](#), April 2014, p. 1.

¹⁵ "Only 9% of our playlist is on Capital FM but 50% of their playlist is on Radio 1, because they're basically playing Top 40 hits predominantly," (Harding). Khomami, ['Radio 1's playlist secrets'](#).

¹⁶ [Radio 1 Service Licence](#), p. 4.

¹⁷ For the top 5 on Kiss, 58% attributed this music to Radio 1. BDRC, *BBC Radio 1 & 2*, pp. 20-21.

¹⁸ Ibid., pp. 22-23.

- 6.18 Listeners are likely to perceive Radio 1 and commercial equivalents to be similar because of the music playlist in peak times on Radio 1. While it is indisputable that Radio 1 plays a wide range of music genres and tracks throughout the week, it does not do this to such an extent during peak times (0630-1900) when the vast majority of listeners tune-in. Instead, more distinctive content is pushed to the edges of the schedule.
- 6.19 To examine the distinctiveness of the Radio 1 playlist by day-part, RadioCentre commissioned CompareMyRadio to look at how many of the tracks played in each time period are unique to the station. As Radio 1 competes not just with Capital FM, but with nearly every commercial radio station, CompareMyRadio compared Radio 1 against the 87 commercial radio stations in its database for the 12 week period of 1 July-30 September 2014¹⁹.
- 6.20 On average, over the whole week, 7/10 tracks Radio 1 played could not be found on commercial radio, reflecting the high level of diversity in some parts of the schedule. However in weekday *daytime*, only 4/10 tracks on the station are not played somewhere on commercial radio during this period: meaning **the majority (60%) of the music on Radio 1 in daytimes is played on commercial radio.**
- 6.21 **There should be stronger requirements in the Radio 1 service licence to ensure distinctive and new music has a significant platform during daytime.** The minimum requirement should be that the majority of music on daytime Radio 1 is unique from commercial radio, with the intention of driving this up still further (up to two-thirds) as a means of extending choice and diversity. The BDRC research supports the view that the music on the station is not as distinctive as it should be, and when it is different most listeners are unaware of this. Only 14% stated that the music played on Radio 1 was unique; while only 22% could recall any specialist music shows broadcast²⁰.
- 6.22 Twice as many listeners recalled chart music on the Radio 1 Breakfast Show with Nick Grimshaw than they did 'new music'. In fact the highest recalled aspects on the Radio 1 Breakfast Show were current chart music (57%) followed by presenter banter (52%)²¹.

- **Arts, culture and comedy**

- 6.23 While different genres of music are customary on Radio 1, daytime speech could also be more ambitious in variety, specifically in terms of delivering the cultural public purposes associated with arts, drama and comedy. Indeed, only 13% of the listeners surveyed by BDRC associated the station with comedy. This is possibly because the station has only commissioned scripted comedy content once in the past 15 years²².
- 6.24 With the ongoing possibility that BBC Three will be removed from terrestrial broadcast, scripted comedy content adapted for daytime Radio 1 should be much more regular, so that young people continue to have dedicated free to air scripted arts content available to them on the BBC. Crucially, this must be turned into meaningful commitments, rather than simply being a general direction with no clear or tangible outcome. The recent addition of comedy sketch vloggers, such as Dan & Phil or Thomas Ridgewell means the station now has a pool of new comedy talent that should be maximised.

¹⁹ Appendix D: CompareMyRadio, 'Music analysis of BBC services vs commercial radio', October 2014.

²⁰ BDRC, *Radio 1 & 2*, p. 19.

²¹ BDRC, *Radio 1 & 2*, p. 26.

²² This was the first time in 12 years. Ben Dowell, '[R1 plans first scripted comedy in 12 years](#)', *Broadcast*, 8 December, 2011.

Service licence recommendations

- The majority of music tracks on Radio 1 in weekday daytime (7am – 7pm) should not be played on commercial radio, with the intention of driving this up still further (to two-thirds)
- There should be a peak-time scripted comedy programme on Radio 1, at regular intervals across the year, with scope to simulcast video of this online

Sustaining citizenship and civil society

6.25 Radio 1 has a service obligation to promote this purpose amongst its audience, primarily through its news and current affairs work, and through its social action output. Our assessment is that it is delivering news, current affairs and social action output, but that these strands are not having a significant impact on young audiences because audiences are not listening in sufficient numbers to this content.

• News

6.26 Engaging younger audiences with broadcast news is an important part of Radio 1's remit. It has a service licence commitment to broadcast at least one hour of news during daytime each weekday, including two extended bulletins. The station undertakes this commitment primarily through the Newsbeat programme. Recent figures from the BBC state that more 15-24 year olds get news from Newsbeat (34%) than from any other BBC broadcast outlet.²³ Its 15-minute lunchtime and teatime bulletins have a combined weekly reach of over 3.3 million listeners (compared to an overall Radio 1 audience of 10.7 million)²⁴.

6.27 As part of measures within Delivering Quality First cost-savings, 17 individuals have left Newsbeat in the past 12 months. Its workforce is now 30 – higher than The Today Programme on Radio 4 – and still appears more than capable of fulfilling the aspirations that it should be a "Panorama for young people"²⁵ on Radio 1. Radio 1's recent Newsbeat: Scotland Decides, which gave 16 to 24-year-old voters in Glasgow a chance to air their views, is testament to such programming²⁶. It was unfortunate that this was not broadcast in peak time so that more listeners could have heard it.

6.28 As the graph below shows, time spent listening to the two Radio 1 Newsbeat programmes is lower than at most other points in daytime. This pattern also follows for 15-29 year olds, meaning Radio 1 is not consistently reaching the vast majority of its core audience with sufficient news output in the current schedule. This is possibly why only 26% of Radio 1 listeners surveyed by BDRC said that they associated the station with accurate and impartial news coverage.

6.29 If Radio 1 truly wants to reach listeners with news and current affairs content, it should schedule a more regularly repeated news features when audiences are higher during

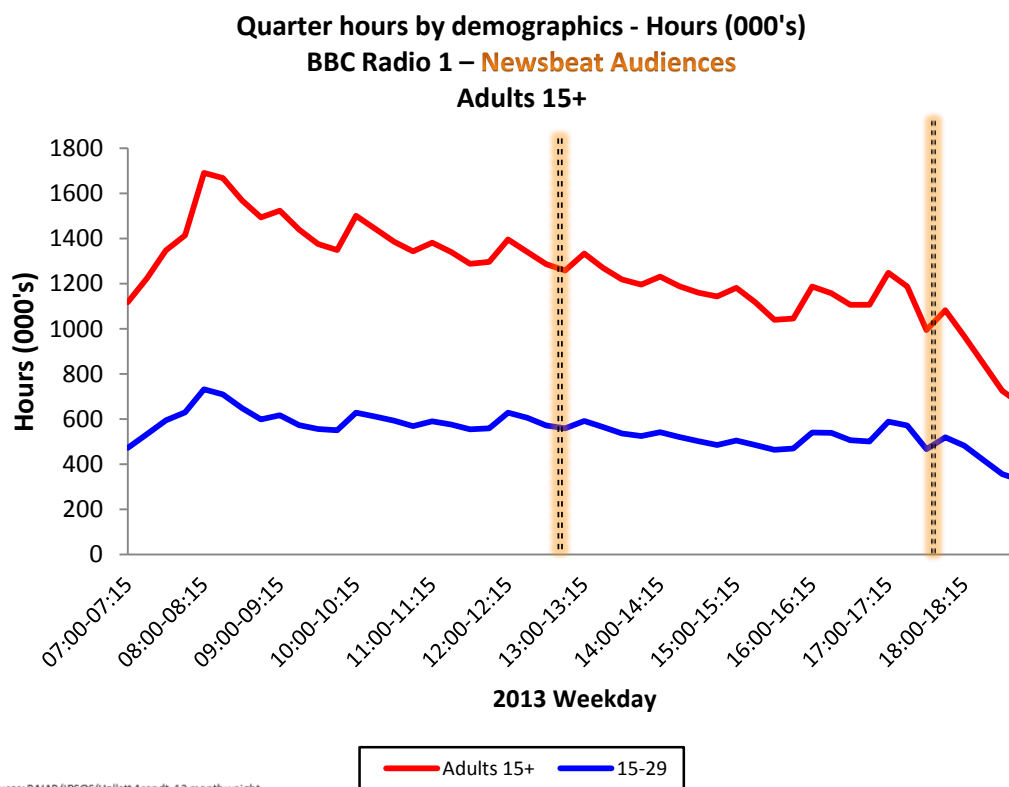
²³ John Plunkett, ['Radio 1's Newsbeat rips up the rulebook to lure young listeners'](#), *The Guardian*, 12 October 2014.

²⁴ Rajar, Q3 2014.

²⁵ John Plunkett, ['BBC Radio 1 to launch a 'Panorama for young people''](#), *The Guardian*, 29 September 2010.

²⁶ Fiona Sturges, ['Scottish independence: Amid the hysteria, the most measured debate came from the wise, young voices on Radio 1's Newsbeat'](#), *The Independent*, 18 September 2014.

breakfast peak, in a manner that is suitable for programming at that time of day. For example, the addition of further news bulletins or headlines at another time in the hour would not only reach more listeners, but would also increase the likelihood of young listeners being exposed to this content for the short periods of time they are likely to listen (over breakfast, in the car).



- 6.30 Further consideration should also be given to the nature, duration and timing of extended news bulletins, to enable Radio 1 to deliver more frequent long-form news content in the linear broadcast stream during daytime. As part of this, **the Trust should outline a base requirement on Radio 1 of five extended news bulletins during daytime** (two at breakfast, two at drive time and one during daytime).
- 6.31 In addition, the station should focus on more serious news throughout the schedule. In practice, this means featuring distinctive content commercial radio cannot provide, such as in-depth features and analysis; covering fewer entertainment features; and undertaking independent journalism to investigate serious issues of consequence to young people.
- 6.32 Definitions of ‘proper’ or ‘hard’ news have long been a contentious subject for the BBC, and we will not attempt to re-open the debate here. However, we feel confident in stating that some of the news featured on Radio 1, such as ‘which is the best Bond girl of all time’²⁷ is not a matter which is a challenging content or a complex issue requiring explanation.
- 6.33 There are wider implications of this failure to reach young people with current affairs output. If the BBC is unable to engage young listeners in news and current affairs at peak broadcast times on its flagship youth service, the organisation as a whole is underserving young people

²⁷ Nick Grimshaw to news reader: “Tina (Daheley), you’re a trained news journalist. Wouldn’t you rather talk about war than which Bond girl is the best one of all time? I think it’d annoy me.” Polly Vernon, [‘Can Nick Grimshaw save Radio 1?’](#), *The Times Magazine*, 27 April 2013.

in line with BBC public purposes, and specifically failing licence-fee payers who use radio as a news resource.

- **Social Action**

6.34 The Radio 1 service licence has specific commitment to ‘specially made speech output including documentaries and social action campaigns, which should form an integral part of the schedule’²⁸. The Controller has highlighted recently that social action campaigns on Radio 1 are the main tool in educating the Radio 1 audience, pointing to its campaigns about alcohol awareness, body image and the Radio 1 Teen Awards as examples²⁹.

6.35 However, the independent monitoring carried out for RadioCentre found that the proportion of daytime speech output devoted to documentaries (0%) and social action (2%) was almost non-existent. Therefore, it is unsurprising that listeners make little or no association with this content and Radio 1. In the previous evidence submitted by BBC management (courtesy of Sparkler) audiences were often found to be unaware of Radio 1’s campaigns³⁰. Our evidence would suggest that this continues to be the case, with only 6% of Radio 1 listeners surveyed by BDRC stating that they associated the station with documentaries and social action³¹.

6.36 **Listeners do not associate Radio 1 content with social action campaigns due to scheduling.** Too often the content is pushed to the fringes of the regular schedule, or as one-off shows that do not amount to creating the required impact with the wider audience. Radio 1’s annual celebration of positive messages about teenagers in the Teen Awards is important, but this is a one-off event. Where there is regular social action content – The Surgery with Aled on Wednesday nights for example – this is during a mid-week evening slot, and not trailed by peak time services.

6.37 **Radio 1 should deliver more public value via its speech output, particularly in daytime.** Independent monitoring of BBC Radio 1 output, commissioned by RadioCentre, highlighted that the majority of speech (65% of total) was general banter of little public value. This is why less than 1 in 5 (18%) of the listeners we surveyed believed Radio 1 was exposing them to new and sometimes challenging material³².

6.38 **News, documentaries, social action campaigns, advice programmes and other current affairs output must be better scheduled to maximise their public value.** Radio 1 is capable of delivering this content but these strands are not having as great an impact on young audiences as might be expected as they are not being broadcast at peak times. We see no reason why some of this content cannot be repackaged for peak-time audiences.

Service licence recommendations

- Radio 1 should have an overarching requirement to schedule news and speech output in such a way to maximise its impact among its target audience
- Radio 1 should have a base requirement of five extended news bulletins during daytime

²⁸ [Radio 1 Service Licence](#), p. 2.

²⁹ ‘The future of BBC Radio 1’, Radiodays Europe, March 2013.

³⁰ BBC Trust, [Service Review Younger audiences](#), p. 62.

³¹ BDRC, *Radio 1 & 2*, p. 40.

³² BDRC, *Radio 1 & 2*, p. 39.

- Hourly news bulletins should be of longer duration
- Additional news updates should be included at breakfast time
- Radio 1 should increase the volume, ambition and prominence of its social action output

Promoting education and learning

- 6.39 According to the most recent iteration of the service licence: ‘BBC Radio 1 should make a significant contribution to this purpose (promoting educating and learning) amongst its audience, primarily through its social action output, a regular advice programme, its documentaries and its vocational initiatives.’ It also states that the station ‘should deliver its remit by producing a wide range of programmes that expose listeners to new and sometimes challenging material’.³³
- 6.40 In peak time, Radio 1 is not challenging the listener as much as it should. When we asked Radio 1 breakfast show listeners to recall content in the breakfast show, the top three things were chart music (57%) the news (49%) and ‘banter’ (52%). In a recent interview with *Digital Spy*, Nick Grimshaw echoed this by recalling some of the highlights of his show over the past two years. Grimshaw cited trying to eat 30,000 calories in one show³⁴. In the week RadioCentre monitored on Radio 1 the DJ was attempting to enter the Guinness Book of World Records for the dance move ‘twerking’.
- 6.41 **Throughout the week, peak-time speech is not challenging the audience as we would expect from a BBC service.** Content creation teams on the station should be better informed on how to deliver the public purposes set out in the service licence. The Matt Edmondson show on weekend mornings was launched with the tag line of being: ‘packed full of music and cheeky, irreverent humour’³⁵. It is difficult to imagine a youth orientated commercial radio show which does not conform to this description. We believe this is why only 23% of Radio 1 listeners in the BDRC survey thought that the station informed and educated the public³⁶.
- 6.42 When Radio 1 does produce documentaries, they are of a high quality and valuable subject matter. The Radio Academy Award winning ‘Tempted by Teacher’ was a great example of complex but relevant content for the target audience. However, this content is often pushed to the edges of the schedule – Tempted by Teacher was aired on a Monday at 9pm³⁷ – when few listeners hear it. When asked about specialist shows, only 14% in the BDRC research could remember any documentaries broadcast on Radio 1.
- 6.43 **The requirement to ‘broadcast at least 40 new documentaries each year’ seems low and should be increased.** In addition, there are currently no requirements on the length, subject matter or scheduling of these documentaries. We believe that the station should be required to schedule its news, current affairs, advice, documentaries and social action output in such a way as to maximise its reach amongst its target audience.

³³ [Radio 1 Service Licence](#), p. 2.

³⁴ Eames, ‘[Grimshaw’s Radio 1 Breakfast Show](#)’.

³⁵ BBC Media Centre, ‘[Radio 1 announces changes to its weekend schedule](#)’, BBC Online, 9 November 2012.

³⁶ BDRC, *Radio 1 & 2*, p. 8.

³⁷ BBC Media Centre, ‘[BBC Radio 1 Stories: Tempted By Teacher](#)’, BBC Online, 12 August 2013.

Service licence recommendations

- Radio 1 should be specifically required to broadcast documentary output in daytime
- Radio 1's should have a target of 60 documentaries each year (excluding music documentaries). These should focus on personal, social, financial, health or educational issues relevant to its audience

Reflecting the UK's nations, regions and communities

6.44 The modern United Kingdom is increasingly diverse. The most recent census identified that London is now one of the world's most ethnically diverse cities, while census comparisons from 2001 to 2011 show an increase in the black and ethnic minority population of five percentage points across the country, with a doubling to 1.2m of the number describing themselves as mixed race³⁸.

• Diversity

6.45 In the RadioCentre response to the Trust review of Radio 1 in 2009, we highlighted that it reaches a relatively low proportion of young people from ethnic minority backgrounds, and despite an upsurge in the popularity of urban music in the mainstream chart; this reach had fallen significantly since 2003. At the time the Trust felt that this reach was supplemented by growth in reach to newer BBC services, such as 1Xtra and the BBC Asian Network, but would be concerned if the disparity between reach to listeners from different ethnic backgrounds becomes more pronounced³⁹.

6.46 While Radio 1 has improved its reach amongst non-white audiences since the previous service licence review, it is still under-performing. Despite increasing its reach amongst non-whites from 14.5% of the population in 2009 to 16.8% in 2013, this is still a lower proportion than the 20.2% of the general population the station reaches. In the core 15-29 target demographic, the discrepancy is even greater. Nearly 40% of the 15-29 population tune into Radio 1 every week, but only 22.2% of non-whites aged 15-29. Only 19% of Radio 1 listeners surveyed by BDRC believed the station reflects UK nations regions and communities⁴⁰.

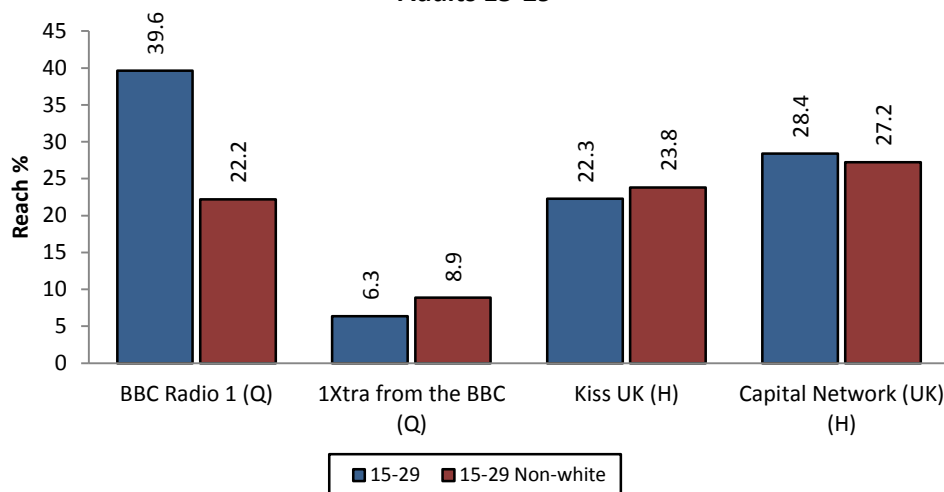
6.47 **Radio 1 does not reach younger minority ethnic audiences as effectively as other youth orientated music stations.** When looked at in comparison to commercial stations to Capital and Kiss, who reach similar audiences of white and non-white backgrounds, the station appears significantly out of step with the diversity of younger audiences. While 1Xtra does reach a greater percentage of non-white listeners, this should not be an excuse, but an aspiration, for Radio 1. 1Xtra is an example of how the BBC can reach younger and more diverse audiences when there is appetite to do so.

³⁸ [UK Census](#), Office for National Statistics, 2012.

³⁹ BBC Trust, [Service Review Younger audiences](#), p. 10.

⁴⁰ BDRC, *Radio 1 & 2*, p. 39.

**Youth music stations - Reach %
In Own TSA Q4 2013
Adults 15-29**



Source: RAIAR/IPSOS/Hallett Arendt, 12 month weight

- National & Regional Identity**

- 6.48 The high turnout at the Scottish Referendum in September 2014 has highlighted the increasing interest in local and national identity which exists in modern Britain. Radio 1 should seek to reflect this better than it currently does in its schedule.
- 6.49 Radio 1 had previously answered much of the criticism of being too London-centric through its 'In the Nations' content, which was broadcast opt-out alternatively from each Nation in the UK. However, 'In the Nations' was a recent victim to cost-cutting procedures, and before that had been scheduled at Midnight on a Sunday. Radio 1 now pays lip-service to regional content through its grand Big Weekend events; which are more dedicated festival broadcast than devolved content.
- 6.50 It appears to RadioCentre that another way to 'reflect the diverse range of music enjoyed around the UK' would be to make use of the established *BBC Introducing* network, which already exists in BBC Local Radio. For a long time, this content, primarily of interest to the Under 30s, has seemed a little out of place in a service for over 55s. A dedicated daily show which showcases the very best of new music from the Nations and *Introducing* content available across the country could reflect the UK's nations, regions and communities, provide a significant platform for new music and emerging UK artists and allow for more live music on the Radio 1 schedule. We think this would better serve its public purposes than specialist shows including a single track from the *BBC Introducing* database.

- Events**

- 6.51 Further dedication to local and up-coming artist would also prevent Radio 1 focussing unduly on the very biggest acts in its events. Radio 1's promotion of the live schedules of established and international artists means that it misses an opportunity to deliver distinct public purpose benefits. The station's focus on the biggest artists, and generic chart music with only support from new artists, explains why audiences believe it is a mainstream music station. We also believe events in this mould – like 'Big Weekend' – duplicate existing provision from commercial operators' own music events.

- 6.52 Radio 1 events are at their very best when they showcase something new and different. For example, Radio 1 Rocks in 2012 and 2013 served as a platform for new and fringe artists in a fringe genre to receive national representation⁴¹. Similarly, the Radio 1 Ibiza weekend works well as the focal point of the station's dance output. It was therefore appropriate that Radio 1 Breakfast show was there covering the event and introducing different genres of music to a mainstream peak-time audience.
- 6.53 **Radio 1's approach to mainstream large scale events is often counter to its 'new music' policy.** Its part in the blanket coverage of major events and festivals, such as Glastonbury or 'T' in the Park, often on an exclusive basis, are unnecessary interventions into the events market: obtaining rights which could also ordinarily be offered to commercial broadcasters, and weakening other offers as a result.
- 6.54 Radio 1 has often said that the station does not demand exclusivity from events. Our understanding is that the importance to festivals of having Radio 1 or Radio 2 as promotional support means that operators over-promise exclusivity to ensure this relationship remains. Indeed, while Radio 1 claim to promote all British festivals, we believe this is seldom the case, and instead there is only airplay devoted to festivals which have a relationship with the BBC.
- 6.55 Radio 1 has adopted the festival model for its own free festival: 'Big Weekend'. This annual event brings well known acts to mass audiences in a different city each summer, for free. It is an unnecessary additional level of competition to an already saturated marketplace; where it is not uncommon for commercial festivals to fail due to lack of ticket sales. In 2012 when Glastonbury took a year off and other festivals had the opportunity to attract those usually devoted to Somerset, Big Weekend was in Hackney on the same weekend when Glastonbury would usually occur, using the same tents, secure fencing, and even 2008 Glastonbury headliner Jay-Z⁴².
- 6.56 **Radio 1 events fail to make the station's music offering distinctive to commercial operators.** The 2014 Big Weekend featured Coldplay, One Direction, Kings of Leon, Kasabian, Ed Sheeran, Lily Allen and Paolo Nutini. None of these artists would be unfamiliar to a Radio 1 or Radio 2 audience, being some of the top-selling artists in the world, and enjoying significant airplay on mainstream commercial radio stations.
- 6.57 BDRC research discovered that the station's omnipresence in the festival market is actually making Radio 1 synonymous with *all* UK festivals. From the survey, 62% of Radio 1 listeners associate the station with music festivals. However, despite the investment commercial operators make in running their own events or investing in partnering third-party festivals, Radio 1 listeners associated the station with those festivals too. For example, 33% said they believed the annual Summer Time Ball (run by Capital FM) was actually a Radio 1 event. This was higher than the 21%⁴³ who correctly identified it as being run by Capital.
- 6.58 Furthermore, Radio 1 live events can have a significant impact on local competition for listeners between the BBC and local commercial radio stations, with events such as Radio 1's Big Weekend having the effect of reducing listening to the commercial radio stations covering the areas where the events are staged, creating particular problems if the station in question is small.

⁴¹ [Radio 1 Rocks](#), *iPlayer Radio*, 13 June 2013.

⁴² Gideon Spanier, '[Radio 1 boss gives pop a purpose](#)', *London Evening Standard*, 20 June 2012.

⁴³ BDRC, *Radio 1 & 2*, pp. 39 & 50.

- 6.59 **Radio 1 events should be more focused on new music.** As a means of shifting the focus of Radio 1 events, or partnerships, we recommend the station should prioritise its support for new music. Further promotion and coverage of *BBC Introducing* would appear the ideal start to this policy on Radio 1. Big Weekend should also approach a broader range of international acts and new artists to headline, and further airtime should be devoted to the *BBC Introducing* tent in Glastonbury, Leeds/Reading and 'T' in the Park coverage.

Service licence recommendations

- Radio 1 should examine opportunities for introducing more talent from minority ethnic groups in daytime to better reflect the UK population
- Radio 1 identify opportunities for greater synergy with *BBC Introducing*, particularly in the coverage of live music and live events

Bringing the UK to the world and the world to the UK

- 6.60 As discussed above, while the ability of Radio 1 to draw the biggest artists in the world to UK radio is admirable, this should not be to the detriment of emerging artists. Radio 1's efforts to deliver this public purpose are leading to excessive promotion of international artists who are already well established in the UK.
- 6.61 While Radio 1 continues to be 'an important platform for British talent, helping it build the foundations for international exposure'⁴⁴, and much of its playlist reflects this, it still appears unwilling to relinquish mainstream international artists that are the mainstay of commercial radio playlists. British urban artist Dizzee Rascal, who has benefitted from Radio 1 support in the past, has recently highlighted these concerns, tweeting that American urban artists get preferential treatment on the station⁴⁵. Four in five of listeners surveyed by BDRC appeared to agree with this by associating Rihanna with Radio 1 (was 30% more people than associated her with Capital FM)⁴⁶.
- 6.62 The BBC often claims that no-other station has the stature to attract such stars of international repute to live events and recording sessions. While Capital's *Summertime* and *Jingle Bell* balls have proved that this is clearly not the case, RadioCentre believes that if the BBC stopped promoting such mainstream artists with mass appeal, commercial operators would have greater scope to move into this space.

Service licence recommendation

- In showcasing musical talent, Radio 1 should focus on giving a platform to unfamiliar and innovative artists

⁴⁴ [Radio 1 Service Licence](#), p. 6.

⁴⁵ Ben Beaumont-Thomas, '[Dizzee Rascal in foul-mouthed Twitter tirade against BBC](#)', *The Guardian*, 6 November 2013.

⁴⁶ BDRC, *Radio 1 & 2*, p. 21.

Emerging Communications

6.63 Media technology is evolving more rapidly now than at any time in the BBC's history. Young people, historically early adopters of new technologies, are at the forefront of this communication revolution and it is therefore appropriate for Radio 1 to have a service licence obligation to experiment with new technologies.

6.64 At the time of the last review of Radio 1, BBC management believed the service licence should be amended to reflect digital activities beyond linear broadcasting. Since then, the station has expanded exponentially in every direction. Director General Tony Hall explained last October that Radio 1 "is no longer just a radio station – it's already filming sessions, interviews and programmes that live online. Its audience can now listen, watch and share its music performances"⁴⁷.

• Audio-visual

6.65 Radio 1 was the first radio station in the world to gain one million YouTube subscribers (now at 1.6m). The YouTube platform has hosted interviews with music stars such as Kanye West, as well as intimate gigs from the Radio 1 Live Lounge, and humorous stunts from the station's presenters⁴⁸. Despite YouTube being an international commercial platform, and recent advancements to the Radio 1 website so it can host videos on its homepage, the third-party site remains the primary destination for Radio 1 videos.

6.66 Plans have been announced by the station – approved recently by the Trust – for a Radio 1 iPlayer channel, which will sit within the main iPlayer service, and serve as another route into this content⁴⁹. While we understand that this is intended to complement broader Radio 1 output in the same way as the YouTube channel, the Trust seems to be providing a significant degree of flexibility to the BBC in the volume of content (and budget) for this service. We also note that Ofcom found that the proposals are *'likely to have some impact on commercial providers...so consideration (of the market impact) may merit greater scrutiny in the context of ambitions to increase the volume of BBC Radio 1 video content in future'*⁵⁰.

6.67 While we understand that audio-visual content is important to reach young audiences, **RadioCentre queries the nature and oversight of much of this online expansion for Radio 1.** Visual accompaniment to radio can be an important thing, but this should not lead to the exclusion of public value content on BBC Radio. It is difficult to see the long-term public value in parody pop music videos involving naked DJs on YouTube or Radio 1's initial forays into TV documentary making (the most recent being a 45-minute programme on boy band One Direction, presented by Scott Mills).

• Governance

6.68 **Rapid technological advancement raises wider issues about Radio 1's current service licence.** Radio 1's move into the online digital space appears unrelenting, with limited regulatory oversight. While content on the Radio 1 website could broadly be considered as under the

⁴⁷ Tony Hall, BBC Director-General, at the [BBC Radio Theatre in London](#) on Tuesday 8 October 2013.

⁴⁸ Notably Greg James' interpretation of Miley Cyrus' infamous 'Wrecking Ball' video, naked and in make-up.

⁴⁹ John Plunkett, ['Radio 1 to launch BBC iPlayer video channel next week'](#), *The Guardian*, 3 November 2014.

⁵⁰ Letter from Ofcom, BBC Trust Significance Test – [BBC Radio 1 in BBC iPlayer Proposals](#), 16 September 2014.

auspices of BBC Online, it is unclear how the Trust sets remits for YouTube content or even the messages Radio 1 puts out through its social media channels.

- 6.69 **Radio 1 is primarily a radio service, and should be evaluated as such.** It should only expand onto new platforms with a clear strategic rationale and due consideration of wider market impact. It should also specifically outline the benefit of any digital expansion back to the broadcast radio station. A dedicated space on the iPlayer for Radio 1 could turn Radio 1 into a video channel as well as a music radio station, which would be an unnecessary intervention and a matter of concern.
- 6.70 As we highlighted at the beginning of this section, Radio 1 should not be so quick to abandon its broadcast priorities, as this is where the overwhelming majority of its audience reside. Despite all the changes to make it visual, online and social – the millions of YouTube subscribers and endless ‘Likes’ on Facebook around the world – this has not translated into an increase in listeners to Radio 1 online.
- 6.71 **Radio 1 is failing to engage young people in the UK with online content.** On average Radio 1 YouTube videos receive views in only the tens of thousands, and many of these are from other territories, whilst total Radio 1 online listening – the main determiner of how a national radio service brings new technologies to its audience – is still only 8.3% of total hours. This is only slightly ahead of the proportion of overall online radio listening in the UK. For the 15-29 demographic, this increases to 10.5% of total hours, but this is actually still less than commercial offerings such as Kiss UK (17.4%) and the overall amount of online listening to radio by 15-29 year olds (12.6%)⁵¹.
- 6.72 **Any change to the Radio 1 audience demographic is not going to occur purely online, but through changes made to its broadcast output.** Management have used all the creative power at their disposal at the fringes of Radio 1, but ultimately, this is not where the majority of the audience resides. It is time for more radical action. The Trust should make significant additions to the Radio 1 service licence to help guide the strategy of the station going forward to ensure it is appropriately serving its target audience.
- 6.73 As we state elsewhere in this document, the **BBC Trust should conduct a review of the cumulative impact of BBC Radio’s activities in providing online audio and video content.** It should also consider whether further regulatory interventions may be required in future. In particular, we note that Ofcom has highlighted recently (in response to the Trust’s review of its Fair Trading policies) that *‘over time and cumulatively there is the potential for such changes to have a greater impact on the market. The Trust may wish to consider further whether these concerns could be considered through a competitive impact code (or alternatively, through a different mechanism)’*⁵².

Service licence recommendation

- A further section should be added to the Radio 1 service licence to determine more clearly the parameters and purpose of the station’s online activities (and the governance and regulation of these activities). This should be subject to a separate public consultation with stakeholders

⁵¹ Rajar, Q3 2014.

⁵² Ofcom, [Letter to Alex Towers from Yih-Choung Teh: ‘BBC Fair Trading Review’](#), 21 October 2014.

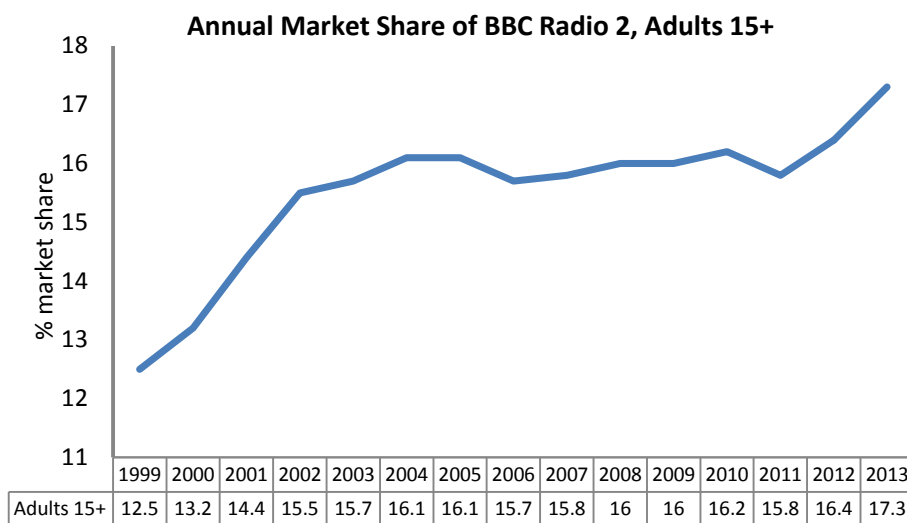


Previous Trust recommendations	Current status
Average age of Radio 2 must not fall below 50	Achieved. Average age remains at 51.
Radio 2 should protect the interests of older listeners	On-going. Limited evidence of this in peak times. Some increases in older listeners in off peak
Reduce the percentage of the audience outside its age range (under 35)	On-going. This has stabilised, but not reduced significantly.
Radio 2 should take more creative risks, particularly in daytime	On-going. Some evidence of this with specific programme strands, but mainly off peak.
Radio 2 should do more to integrate off peak content into peak	Limited evidence of this in practice
Radio 2 should refresh its comedy output to gain greater impact	No discernible impact or audience recognition of comedy programming.
Minimise song overlap between Radio 2, Radio 1 and commercial radio	Overlap with individual stations is low, but not when compared across commercial radio. Majority (60%) of daytime weekday music also played on commercial radio.

- 7.1 In the Trust's last review of Radio 2 in 2010, it concluded that the station should use its scale and influence to take a more ambitious approach and be more distinctive, particularly in day time, even though this carries the risk that audience numbers could fall.
- 7.2 Radio 2 responded by introducing a broader range of content in parts of the Radio 2 schedule, and the audience has continued to grow. RadioCentre believes that this presents the station with an opportunity to introduce even more public service content to the daytime schedule, and take more programming risks in the future.
- 7.3 Radio 2 now reaches 32% of the population, with over 15 million weekly listeners and more than 17% of the UK radio market, meaning around every one in six hours spent listening to the radio in the UK is spent tuned into Radio 2. Looking at the figures as a whole this reach has increased across the age spectrum, with a 13.3% increase in over 35s and a 10.7% increase in 15-34 year olds since 2009.
- 7.4 The Trust also stated previously that Radio 2 should 'protect the interests of older listeners'⁵³ while seeking to reduce the proportion of its audience outside its target age. Although older

⁵³ BBC Trust, [Service review BBC Radio 2 and BBC 6 Music](#), February 2010, p. 3.

listeners are now being added at a higher rate (there are now 21% more over 65s since 2009) listeners are also increasing across the entire population. Therefore, rather than stabilise the audience, Radio 2 has continued its upward movement, with its mass-market appeal.



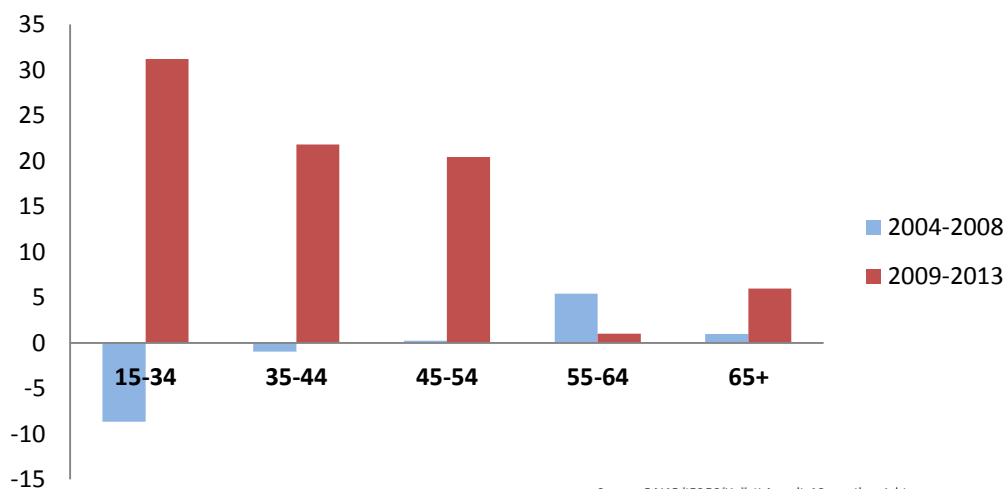
Source: RAJAR/IPSO/Hallett Arendt, 12 month weight

- 7.4 While the Trust should be commended for helping to instigate an increase in older listeners at Radio 2, the station has been helped by changes in the radio market. As mentioned in the previous section, changes at Radio 1 have led to a reduction in older listeners to the station, and some of which will have undoubtedly moved to Radio 2. In addition, the wider climate of a reduction in radio listening for youth audiences has meant that the majority of stations have seen a reduction in listeners under 25.
- 7.5 In addition, **Radio 2 is bucking the market trend when it comes to younger listeners.** Over 10% more under 35s listen than they did at the time of the last review, with listening hours also increasing by 12% (against an overall reduction for radio). This becomes even more pronounced when the 15-24 year old audience is examined. Despite a fall in reach across radio in recent years, 19% more 15-24 year olds listen to Radio 2 than they did in 2009.

- **Breakfast**

- 7.6 In 2009, at the time of our previous submission to the Trust on Radio 2, there were rumours about changes to the daytime presenter line-up of the station. Of specific concern to RadioCentre was the appointment of Chris Evans to *Breakfast*, which we stated would attract a considerable proportion of younger listeners to the show just at a time when the Trust wanted to prioritise older listeners. Evans was appointed in January 2010.
- 7.7 As predicted, the biggest gains to the Radio 2 Breakfast Show since that time have been to listeners outside the service licence remit set by the Trust. Evans has added 37.6% more 15-24 year olds to his time slot, with a vast proportion of these coming from the 15-19 year old age group: 47.5% more listen to the slot than did in 2009. In contrast, only 6% more over 50s are listening, during a period when 50+ listening to radio increased 8.5%.

**Percentage change of listenership to Radio 2 Breakfast Show
(by age group)**



7.9 Previously we estimated that the appointment of Chris Evans would attract 6% more listeners aged 15-34; outside Radio 2's service licence remit⁵⁴. As the chart above shows, we considerably underestimated this appeal to younger audiences. In appointing Evans to *Breakfast*, Radio 2 has actually reversed a decline in under 35 listening, a trend which has now followed across the station. It is unsurprising that 31% of 25-34 year old Radio 2 listeners surveyed by BDRC Continental now think the station is actually aimed at their age group⁵⁵.

• Off-peak

7.10 In off-peak times a different picture emerges. While a total of 1.5 million more people now listen to Radio 2 across the week than at the time of the previous review (2009), after 7pm the station has lost over 200,000 (5.6%) listeners. This would be considerably more, had the station not added another 148,000 listeners over 65 (18.1%) in this time slot, the only age demographic where listening has actually increased off-peak.

7.11 In the previous review, the BBC Trust emphasised that Radio 2 should do more to increase the proportion of over 65s in the audience, by producing programming of more appeal to those listeners⁵⁶. From audience data available, it appears that the station has only done this during off-peak times. While Radio 2 therefore appears to be in line with general audience service licence requirements, it is still under-performing in peak times for older listeners.

• Scheduling

7.12 While Radio 2 is incredibly successful, and continues to provide unique content, its policy of generating listening 'scale' during peak listening times in order to drive listening to public purpose elements off peak ('ratings by day, reputation by night') is fundamentally flawed. In order to correct this, the station needs to create a renewed appeal to older listeners in peak time by introducing programming elements which are of particular appeal to those aged 55+, and currently mainly scheduled off-peak.

⁵⁴ RadioCentre, '[Reach not Reith: How changes at Radio 2 have undermined the delivery of the BBC's public purposes](#)', August 2009.

⁵⁵ BDRC, *Radio 1 & 2*, p. 44.

⁵⁶ [Service review BBC Radio 2 and BBC 6 Music](#), p. 4.

- 7.13 Commercial broadcasters understand that different types of audiences require different approaches to programming. However, there is no reason why an edited version of off-peak programming could not be repurposed for a peak-time audience in a magazine style which works so well on BBC TV shows such as 'The One Show'. BBC One and Two are successful with a broad selection of programming in peak times, while Radio 2 continues with a safer, music-led male DJ show format
- 7.14 As the nation's favourite radio station, Radio 2 is a much loved part of Britain's radio output. However, it has reached this privileged position across the last decade through a series of programming policies that have taken the station's broad entertainment remit too literally. The Trust should do more to help the station serve peak time audiences with content they do not receive anywhere else. We cover this issue in more detail below.

Service licence recommendations

- Radio 2 should be required to progressively increase the average age of its audience for each of the next 5 years (until its next Service Licence review)
- This should be monitored along with other licence conditions and public commitments, with an assessment of performance published alongside the BBC annual report⁵⁷
- The age remit of Radio 2 should be revised as appealing to age groups over 45
- Radio 2 should reflect an overarching responsibility on BBC music radio stations to maximise the reach and impact of public purposes, using scheduling and programming methods

Stimulating creativity and cultural excellence

- 7.16 Creativity and cultural excellence is the major priority for the Radio 2 service licence. The broad entertainment remit of the service means it should encompass a variety of arts content, including an unrivalled breadth of music spanning folk, show tunes, country, orchestral and organ music, as well as speech programming covering arts and comedy.

• **Music**

- 7.17 As a national popular music service, it is music that dominates the majority of the service licence, and the majority of output. Independent monitoring undertaken for RadioCentre for Radio 2 over a week in September (22nd – 26th) found that 47.5% of all weekday *daytime* content was made up of music tracks, with an additional 3 hours (4.8%) of spoken content across the week devoted to musical related discussions or interviews. The level of music is much higher in evenings and overnight.
- 7.18 Radio 2 has several requirements placed on its music content. During daytime 40% of music should be from the UK, while 20% should be defined as 'new'. From the BBC Annual Report, we understand the station is meeting these objectives quite comfortably, to the extent that these broad brush quotas may need to be reviewed and extended by the Trust.
- 7.19 For example, it has always seemed unusual that a music service aimed at the over 35s should be required to meet new music quotas. This is a confusing commitment which could compel

⁵⁷ BBC, [Performance against public commitments 2013/14](#).

the station to playing acts which are more suited to Radio 1, or even commercial hit radio services. This led to agreement in the last review that song overlap with Radio 1 should be part of management performance reports, to ensure daytime overlap remains at a low level. RadioCentre believes these records should be published.

- 7.20 Radio 2 has a service licence commitment to broadcast a broader range of music than any other UK radio station. The Radio 2 Controller has recently claimed that: “Our own evidence is that our offer musically is incredibly distinctive from commercial radio, something like three quarters of the songs we play are not heard on any other radio station in the UK. That is de facto distinctive.”⁵⁸ Unfortunately this evidence has not been made publicly available.
- 7.21 **RadioCentre disputes the claims made by the station regarding the extent of music distinctiveness.** While we recognise that the range of music across the schedule is, quite rightly, broader than any of the individual commercial radio competitors serving a similar audience, we believe this is not the case when looking at the whole commercial radio market. Because Radio 2 targets 35+ adults, and has unrivalled resources and national spectrum, it is the primary competitor for the entire commercial radio industry, and should be evaluated as such.
- 7.22 To examine the distinctiveness of the Radio 2 playlist by day-part, RadioCentre commissioned CompareMyRadio to look at how many of the tracks played in each time period are unique to the station. As Radio 2 competes not just with Smooth Radio or Magic, but with nearly every commercial radio station, CompareMyRadio compared Radio 2 against the 87 commercial radio stations in its database for the 12 week period of 1 July-30 September 2014. The results of this research are attached as an annex.
- 7.23 The findings of the study show that the music on Radio 2 is not as distinct as claimed. Over an entire week, only 45% of the tracks played on the station were not played on a commercial radio station. In daytime (0630-1900) this ratio drops to 40% (a 60% duplication rate), meaning **only 4/10 of the tracks played in daytime on Radio 2 are not being played on commercial radio**. During Steve Wright’s show in mid-afternoon, this falls further to only 20% of tracks. Indeed, the only time the music is as distinct as claimed is over the weekend, when over 7/10 tracks played are not found on commercial radio⁵⁹.
- 7.24 It is worth noting that measuring track duplication on Radio 2, a broad music station with older-targeted commercial radio station is also a blunt measure of distinctiveness. Radio 2 may be the only station that week to play the Spice Girls’ ‘2 Become 1’ while Heart plays ‘Spice Up Your Life’ – both stations would still be playing an old Spice Girls hit. Similarly, Radio 2 may play Elvis Presley’s ‘Return to Sender’ while Gold plays ‘Viva Las Vegas’ – both stations would still be playing an old Elvis hit.
- 7.25 The findings from this research were echoed by what BDRC heard from the Radio 2 audience. Only 20% of those surveyed by BDRC thought it provided music not available on other stations. 40% of Radio 2 listeners said the station played the most popular music, a higher figure than said commercial radio plays popular music. Indeed, when played the top 5 tracks on Smooth Radio, 65% of the Radio 2 listeners surveyed thought this was music from Radio 2. 75% most associated Michael Bublé with the station – despite his recent TV campaign advertising Smooth Radio⁶⁰.

⁵⁸ John Plunkett, ‘[BBC Radio 2 ‘bound to have a female presenter on daytime’](#)’, *The Guardian*, 14 October 2014.

⁵⁹ Appendix D –CompareMyRadio: ‘Music analysis of BBC services vs commercial radio’.

⁶⁰ BDRC, *Radio 1 & 2*, pp. 31-35.

7.26 **Further emphasis needs to be placed on Radio 2 music being distinct from commercial equivalents in daytime.** In the previous service review, the Trust amended the Radio 2 and 6 Music service licences to emphasise the importance of minimising song overlap between the two stations, as well as with Radio 1 and selected commercial radio stations. However, as the CompareMyRadio research shows, there is still considerable overlap between Radio 2 and commercial radio as a whole, particularly in weekday daytime.

- **Specialist music**

7.27 **Radio 2 is now defined by a mainstream music playlist.** Once dominated by the likes of Mantovanni and Val Doonican, it now features former boy band stars such as ‘national treasure’⁶¹ Gary Barlow or international indie guitar groups: Coldplay’s ‘A Rush of Blood to the Head’ was voted best ever album in a recent Radio 2 poll⁶². Head of Music Jeff Smith has recently said that “Radio 2 says to an act they have really entered the mainstream and are getting to a big, big audience.”⁶³

7.28 While it is clear that music in daytime on Radio 2 is not as challenging as it might be, during off-peak the station does broadcast some noteworthy and often award-winning content, which cannot be found on commercial stations. Individual shows such as Carla Bruni’s ‘Postcards from Paris’, a three-part series focusing on French songs, or Ana Matronic presenting a series about disco music were broadcast after 7pm on Radio 2.⁶⁴ Similarly, the ‘12 Hours to Please Me’ project was brilliant public service broadcasting, but was broadcast at 10.30pm⁶⁵. These and other high value programmes deserve to be broadcast in daytime and at peak times.

7.29 Radio 2 has an obligation to broadcast over 1,100 hours of specialist music programmes each year, but no obligation as to when this content will be broadcast. Therefore too much of the specialist UK music, which is of interest to more diverse audiences, is broadcast by the station outside of peak listening times when less than a tenth of the daytime peak audience listens. The research undertaken by BDRC highlighted that only 21% of listeners surveyed said they had heard specialist music shows Radio 2⁶⁶.

7.30 The current Radio 2 music policy is likely to continue to have a detrimental effect on the station’s ability to attract older audiences. In what former Radio 2 DJ Russell Davies termed “a cultural shift”⁶⁷, there continues to be a lack of ambition to regularly showcase the different genres the station play, which may be of interest to older listeners.

- **Arts and Culture**

7.31 According to the BBC annual report Radio 2 broadcast over 115 hours of arts programming last year, against a target of 100 hours⁶⁸. However, when an average week on the station was reviewed by an independent monitor only 10 minutes 29 seconds of specific arts

⁶¹ Jess Denham, ‘BBC criticised over ‘Gary Barlow day’’, *The Independent*, 2 December 2013.

⁶² Press Association, ‘Coldplay’s A Rush Of Blood To The Head voted best album in Radio 2 poll’, *The Guardian*, 1 April 2013.

⁶³ From: ‘Meet the Radio 2 playlist king’, *Saga Magazine*, 23 April 2014.

⁶⁴ BBC Ariel, ‘Female superstars spring onto Radio 2’, 8 April 2014.

⁶⁵ Roy Martin, ‘BBC Radio 2 has “12 Hours To Please Me”’, *Radio Today*, 31 January 2013.

⁶⁶ BDRC, *Radio 1 & 2*, p. 44.

⁶⁷ Jasper Copping, ‘DJ Russell Davies says BBC snubbing older listeners after show was dropped’, *The Telegraph*, 4 August 2013.

⁶⁸ BBC, *Performance against public commitments 2013/14*, p. 9.

programming was deemed to be broadcast in daytime. This equates to 0.5% of all speech in that time. Even examining the off-peak schedule, we are unsure how Radio 2 fulfils this service licence criteria and believe the definitions of what content it categorises as ‘arts content’ should be better defined and published.

- 7.32 In its last review of Radio 2, the Trust recommended that it take extracts from off-peak content such as comedy, the arts and documentaries and repackage them so they are suitable for peak time audiences⁶⁹. This has not happened in a way that has made an impact on listeners. Consequently only 17% of Radio 2 listeners surveyed by BDRC Continental said that they associated the station with any sort of arts programming⁷⁰.
- 7.33 This limited impact is disappointing and should be addressed, particularly given the renewed focus on arts programming outlined by the BBC Director General⁷¹. In order to improve this performance the target of 100 hours of arts programming (which does not seem particularly ambitious) should be reviewed and increased.
- 7.34 Recent literary and writing content it broadcasts at peak times is testament to how arts programming *can* work in peak times. The Chris Evans ‘500 words’ writing competition is rightly cited as an excellent example of how to create public service broadcasting in a peak-time slot, despite only running for one month a year. Simon Mayo’s book club – which takes a small scale community practice and repackages it on a mass scale – is another example of a more regular way to represent arts heavy material for peak-time audiences.
- 7.35 When examining the programming and scheduling of Radio 2, we have found that content rich in public purposes is not as prevalent as celebrity interviews and entertainment chat. Celebrity interviews should not be regarded as ‘arts content’. Celebrities are also appearing increasingly on Radio 2 solely to plug their latest product. This is not only a poor use of Radio 2’s huge audience, but also a lost opportunity for commercial broadcasters who could otherwise offer advertising opportunities for such products.

- **Comedy**

- 7.36 **RadioCentre does not believe Radio 2 meets its considerable comedy commitments effectively.** It should offer regular comedy programming, supporting the BBC’s commitment to new comedy by developing new talent in writing and performance as well as bringing listeners established comedy performers. Yet only 11% of the Radio 2 listeners surveyed by BDRC said that they associated the station with original comedy⁷².
- 7.37 The Trust previously committed to increasing the station’s comedy programming from the scheduled one hour a week. Radio 2 and BBC Radio Comedy revived the BBC New Comedy Award in response⁷³, but since then comedy content has returned to the fringes of the schedule. Less than 2 and half minutes of scripted comedy was broadcast in the weekdays monitored for RadioCentre.
- 7.38 **A comedy condition should be inserted into the Radio 2 service licence,** which makes a long-term commitment to comedy programming in regular off-peak slots. This should be edited

⁶⁹ [Service review BBC Radio 2 and BBC 6 Music](#), p. 5.

⁷⁰ BDRC, *Radio 1 & 2*, p. 43.

⁷¹ BBC Media Centre, [‘Tony Hall announces greatest commitment to arts for a generation’](#), 25 March 2014.

⁷² BDRC, *Radio 1 & 2*, p. 43.

⁷³ BBC Media Centre, [‘Radio 2 New Comedy Award 2012 launched’](#), 25 May 2012.

and repackaged for peak-time audiences in a 'comedy short' format, which has worked well on TV for Channel 4 as well as new online offerings.

Service licence recommendations

- The majority of music tracks on Radio 2 in weekday daytime (7am – 7pm) should not be played on commercial radio, with the intention of driving this up still further (to two-thirds).
- Radio 2 should increase the proportion of specialist music available to the public, by featuring more of this output in the daytime and peak time
- Radio 2 should remind producers and presenters conducting interviews (for example, with musicians, artists and writers) of the BBC's editorial guidelines and rules on product endorsement
- Radio 2 should be required to broadcast one hour of comedy programming each week
- Extended clips or extracts of this content should be repurposed and broadcast at peak times

Sustaining citizenship and civil society

7.39 Radio 2 has a commitment to 'broadcast at least 16 hours of news and current affairs programming each week, including regular news bulletins.'⁷⁴ From the monitoring of peak time content undertaken by an independent arbitrator, there was 10 hours 22 minutes of news in weekday peak-time. This combined with regular bulletins through the night means that we are satisfied Radio 2 meets its news requirements.

7.40 **News on Radio 2 is an example of how difficult and complex subject matter can be presented to mainstream audiences.** Such is the success of its news output, the station is now the most used radio station for news in the UK. Amongst the survey conducted by BDRC Continental, more listeners associated Radio 2 with news (61%) and current affairs (42%) than any other service licence attribute⁷⁵.

7.41 Ofcom has found that 72% of those who consume news through BBC Radio 2 do so at least once a day⁷⁶. Radio 2 therefore has a responsibility to be at the forefront of public service content in news and current affairs, and crucially should provide different types of news output to better cater for this returning audience.

7.42 The Jeremy Vine lunchtime show now has higher audience figures than any news programme on BBC Radio (now regularly outperforming Radio 4's Today Show in Rajar figures). While we have in the past queried the proportion of music and non-news items on the show, as well as whether Vine's subject matter can always be considered 'hard' news, it is indisputable that it has a commitment to issues which are up to the minute, relevant to the audience and involving.

7.43 From the monitoring undertaken in September, around two thirds of the content on *The Jeremy Vine Show* was speech content, and the majority of this deals with serious subject matter from a different perspective to how the same stories would be treated on Radio 4, 5

⁷⁴ BBC Trust, [Radio 2 Service Licence](#), April 2014, p. 5.

⁷⁵ BDRC, *Radio 1 & 2*, p. 43.

⁷⁶ Ofcom, [News consumption in the UK - 2013 report](#), 25 September 2013, p. 8.

Live or LBC. For example, in the week monitored for RadioCentre, he was at the Labour Party Conference in Manchester, and his guests ranged from Shadow Chancellor Ed Balls, to Francis Fukuyama as part of the 'What Makes Us Human?' series.

- 7.44 In our response to the Trust Review of News and Current Affairs, we suggested that there was scope for the show to reduce its music component further in order to allow for more time to debate serious issues. We still believe that this is the case and recommend the Trust revisit these proposals⁷⁷.

Service licence recommendations

- The commitment to an accessible current affairs programme in daytime (currently *The Jeremy Vine Show*) should be strengthened by increasing the proportion of speech
- Additional news updates should be included at breakfast time
- Radio 2 should provide longer and more detailed news bulletins during daytime (potentially using content originally recorded for Radio 4 but repurposed for Radio 2 listeners)

Promoting education and learning

- 7.45 There is still more scope for Radio 2 to use its speech output more effectively to promote the BBC's public purposes. While we have noted that this is partly a matter of maximising the reach and impact of the stations' output, it is also a case of ensuring that the right sort of speech output is provided in the right volume and in the right way.
- 7.46 Our findings indicate that **people who listen off-peak have a higher opinion of Radio 2's delivery of the public purposes than those who listen only in peak time**. BDRC research showed that off-peak Radio 2 listeners were 7% more likely to say that the BBC informed and educated the public than peak listeners⁷⁸. We believe that much of this is due to the lack of content of real substance which exists outside the dedicated current affairs and documentary programming.
- 7.47 Radio 2 has the resources to better inform and educate listeners in presentation speech. In monitoring conducted for RadioCentre, one fifth of all speech in peak time could only be described as banter; which covered a variety of issues ranging from celebrating 25 years since debut episode of *Baywatch* to discussing the best accompaniment to doughnuts⁷⁹. This is content that would be more familiar to the format of a commercial radio station.
- 7.48 In some parts of the schedule the public value aspect of output appears unrecognisable. Only 38% of the Steve Wright show is speech, and of that 35% could be termed general 'banter' of no clear public service value.

• Documentaries

- 7.49 Scripted documentary content offers the Radio 2 audience a guaranteed opportunity to access distinctive and informative speech, often supplemented with – or focusing on – music not

⁷⁷ RadioCentre, [Response to BBC Trust Service Review of BBC News and Current Affairs](#), December 2013, p. 5.

⁷⁸ 40% peak vs 47% off-peak. BDRC, *Radio 1 & 2*, p. 13.

⁷⁹ Both from *Chris Evans Breakfast show*: Monday 22nd September and Wednesday 24th September 2014.

heard elsewhere in the schedule which may be of particular interest to a more diverse audience. Radio 2 has a commitment to broadcast 130 documentaries a year. In practice these are mainly music related, and universally in off-peak times.

- 7.50 On other BBC broadcasting channels – such as BBC 2, BBC 4, Radio 4 or 5Live – independent documentary productions are treated as the linchpin of peak-time schedules. They are ‘event’ content, which is publicised in other areas of the schedule to maximise impact. However, a brief glance at the Radio 2 schedule indicates that documentary content is tucked away in the peripheries – apparently used as filler for a spare hour between more mainstream weekly music programme formats. Unsurprisingly BDRC found that only 13% of Radio 2 listeners could name a documentary, arts or culture programme on the station⁸⁰.
- 7.51 Audio documentary content appears undervalued on Radio 2. This format could be adapted creatively for primetime schedules, providing unique insights into different music genres, as well as social and cultural issues.

- **Promotion**

- 7.52 Much of the scheduling problems discussed above could partly be addressed by changes to Radio 2 promotion policy. While the monitoring undertaken for RadioCentre highlighted that *Friday Night is Music Night* and the *Cerys Matthews Show* on 6Music received several plugs through the peak-time week, these were far outweighed by the amount of times *the Chris Evans Breakfast Show* was trailed. These findings were echoed in BDRC’s survey of listeners, where one particular respondent commented that promotions they recalled were “mainly things associated with Chris Evans”⁸¹.
- 7.53 Promotion for Chris Evans’ show (7 times over the week in day time), Graham Norton’s chat show (8) or even other popular mainstream BBC content like *Strictly Come Dancing* (7) are unnecessary uses of the Radio 2 peak-time audience. These trails should instead be used to concentrate on the harder to find, less listened to educational content available on Radio 2, like documentaries or social action appeals.

- **Social Action**

- 7.54 Radio 2 has a commitment within its licence to actively support pan-BBC learning and social action initiatives, but from monitoring undertaken for RadioCentre, less than 3 minutes of content throughout peak-time was devoted to charity campaigns, and only 6% of listeners associate social action with Radio 2. While we accept that many of these campaigns – such as Children in Need - are of a seasonal nature, we do feel the station has an opportunity to do more in this space.
- 7.55 Radio 2 should take a more ambitious approach to social action campaigns, and consider offering a continuous year-round programme, which could include social or community advice sections in a similar format to the *Surgery with Aled* on Radio 1, or look to engage specific ethnic or religious communities currently underserved by the station.

⁸⁰ BDRC, *Radio 1 & 2*, p. 44.

⁸¹ BDRC, *Radio 1 & 2*, p. 47.

Service licence recommendations

- Radio 2 should be required to experiment with broadcasting documentary output (or suitable extracts of this output) in daytime
- Radio 2 should increase the volume, ambition and prominence of its social action output

Reflecting the UK's nations, regions and communities

7.56 A station with the extensive reach of Radio 2 has a responsibility to reflect the diverse multicultural place the United Kingdom is today. It has consistently failed to do this, and performs poorly even by BBC standards in these areas. Indeed, currently only Radio 3 reaches a smaller non-white audience than Radio 2, and only 5 Live has a higher percentage of male listeners.

7.57 RadioCentre has not conducted a separate evaluation of these failings (although we believe it is an important responsibility for the Trust to undertake this analysis), there appear to be some pretty straightforward changes to the schedule and presenter line-up which could dramatically readress this imbalance.

• **Religion**

7.58 The only specific condition in the service licence reflecting the UK's nations, regions and communities is related to 'broadcasting at least 170 hours of religious output each year covering a broad range of faiths'. The BBC annual report states that it delivered 209 hours last year.

7.59 However, it is difficult to see how this condition was met. Independent monitoring commissioned by RadioCentre found that there was only 11 minutes of religious output recorded in weekday daytime. This related to the 2 minutes 30 seconds each day devoted to 'Pause for Thought' in *the Breakfast Show*. Examining the Radio 2 schedule at other times, there appears to be only 1 hour of dedicated religious programming, 'The Sunday Hour' with Diane Louise Jordan, meaning in total there is only 1 hour and 11 minutes of religious programming each week on Radio 2, the equivalent of 61.5 hours of religious content each year, or just over a third of the prescribed programming. Consequently, only 16% of the listeners BDRC surveyed associated Radio 2 with religious programming.

7.60 Moreover, the vast majority of content on both *Pause for Thought* and the *Sunday Hour* tends to be overwhelmingly Christian in nature. The Trust should examine if it is appropriately representative of the wider UK population. We recommend that the Trust introduces a mandatory condition on weekly religious programming to the service licence, which focuses on a variety of faiths.

• **Diversity**

7.61 Radio 2 does not reflect wider BBC policy regarding promoting ethnic and gender diversity. Diane Louise Jordan is a rarity on Radio 2, as she is both non-white and a woman. We understand that in recent months the Director General has made several proposals regarding better representation at the BBC, so it is therefore disappointing that this does not appear to

have translated to Britain's biggest radio station; which has a talent line-up that is overwhelmingly middle-class, male and white.

- 7.62 At the time of the last Radio 2 review the Trust stated it would like the station to do more to appeal to audiences who are currently less likely to listen, including ethnic minorities.⁸² We understand that in response BBC management proposed a package of measures to increase the ethnic diversity of the Radio 2 audience. However Radio 2 still only reaches 8.1% of non-whites in the UK, compared to 28.7% overall. This is more pronounced at daytime, when only 3.8% of the non-white population tune in.
- 7.63 **There should be more ethnically diverse representation on Radio 2 during peak-time.** Currently, across 12 hours of peak-time, only Breakfast newsreader Moira Stuart is non-white. This picture does not get much better over weekends, when Diane Louise Jordan, Trevor Nelson and Craig Charles are the only other non-white representation.
- 7.64 **Gender balance on the station has become an even more pressing issue.** Men dominate Radio 2 daytimes like no other BBC service. Every single peak-time Radio 2 show is presented by a man. When women are heard, these are in minor back-up roles. Even by general broadcasting standards, where women make up only 20% of solo radio broadcasters⁸³, this is a poor reflection of the audience; which appears to be shifting more male as a result of these conscious programming decisions.
- 7.65 We acknowledge that the Trust has recognised the wider issues surrounding gender equality on air, and called on management to come up with a co-ordinated plan to tackle the shortcomings⁸⁴. However, Radio 2 appears to be unwilling to do this because of fears of losing audience figures. In response to recent criticism on the issue, Controller Bob Shennan felt he could not make the changes due to the current popularity of the line-up⁸⁵. This lack of risk taking in peak-time output is consistent with much of the content issues already discussed.
- 7.66 Radio 2 must increase representation of women in peak-time broadcast as soon as possible. There are already a plethora of talented female broadcasters on the network who have been pushed to the edges of the schedule as a result of this policy. The issue is only exacerbated by the good work being undertaken at Local Radio level; where BBC Director-General Tony Hall has said he wants to have half of the breakfast shows on Local Radio stations presented by women⁸⁶.

Service licence recommendations

- Radio 2 should be required to provide weekly religious programming covering a broad range of faiths
- Radio 2 should be required to reflect the diversity of the UK within its line-up of presenters, especially at day time

⁸² [Service review BBC Radio 2 and BBC 6 Music](#).

⁸³ Lisa O'Carroll, ['Women make up only 20% of solo radio broadcasters, research reveals'](#), *The Guardian*, 12 July 2013.

⁸⁴ John Plunkett, ['BBC ordered to tackle 'gender imbalance' among presenters'](#), *The Guardian*, 21 July 2014

⁸⁵ John Plunkett, ['BBC Radio 2 'bound to have a female presenter on daytime''](#), *The Guardian*, 14 October 2014; and John Plunkett, ['BBC Radio 2 boss blames daytime stars' popularity for lack of female presenters'](#), 29 November 2013.

⁸⁶ Roy Martin, ['More women at breakfast, says Tony Hall'](#), *Radio Today*, 22 August 2013.

Bringing the UK to the world and the world to the UK

- 7.67 In recent years Radio 2 has been able to use its scale to rival Radio 1 in terms of attracting international artists. Like Radio 1, it has representation at Glastonbury and other BBC affiliated music events, although its role focuses much more on British talent and UK artists when recording live performances.
- 7.68 Indeed, like Radio 1, Radio 2 now runs its own annual Radio 2 Live festival, in Hyde Park. In recent years this has featured the likes of Gary Barlow, Jessie J, Status Quo, Mick Hucknall and ELO. While it is good for UK music that the station continues to promote British artists, we feel that such mass events are unnecessary additional level of competition to an already saturated marketplace. Instead we recommend they feature less mainstream artists, and focus on performers which reflect the diverse music commitments Radio 2 has in its service licence.

Service licence recommendation

- In showcasing global musical talent, Radio 2 should focus on giving a platform to unfamiliar and innovative tracks including those of particular appeal to listeners over 55

Emerging communications

- 7.69 Radio 2 seeks to encourage online music interactivity with its audience, for example through live performances that may attract listeners to sample content or listen again. The station should continue to use its influence in this way to promote the benefits of digital media so that hard to reach groups and older audiences do not get left behind.
- 7.70 In the previous review the Trust felt that Radio 2 had been less successful than other BBC stations at encouraging its audience to listen digitally or go online. Ultimately this is a judgement for the Trust, but efforts to include references to digital listening and multi-platform listening are notable. The station should continue to ensure that this remains the case, but ensure its online presence is not having too great an impact on commercial rivals.
- 7.71 We note from the content monitoring undertaken for us that promotion of digital content – be it 6 Music shows on DAB, or BBC apps of relevance – is undertaken significantly. In the week monitored, 30 minutes – 37 promos – were dedicated to publicising BBC Online offerings on the station. This is a good example of promoting content the audience may be unaware of, or is hard to reach. Furthermore, the weekly newsletter email, which promotes specific content to listeners, is a good way of further encouraging online interaction, and provides another opportunity to promote more diverse content to Radio 2's audience.

Service licence recommendation

- Radio 2 should continue to help improve media literacy and access to on-demand radio listening for older audiences



Previous Trust recommendations	Current status
Accessible and welcoming, without alienating core audience	Difficult to measure. Significant populist output, but core audience seem to be moving away
Consider how the BBC can best deliver classical, jazz and world music to all licence fee payers	On-going. Appears to be part of the overall strategy of broadening appeal
Consider how to help audiences navigate its wide range of content	New website launched, but no publicly available assessment of the impact or effectiveness
Remove Radio 3 message boards	Achieved

- 8.1 Radio 3 has a remit based principally on the provision of classical music and cultural programming, which marks it out from other BBC music radio services. Nevertheless, we are pleased to have the opportunity to comment upon the role of the station as part of this review.
- 8.2 Due to the significant level of funding received by Radio 3 (£40.8m for content in 2013-14) and the range of responsibilities that fall to the station and its controller, from challenging musical output to BBC performing groups and the BBC Proms, it occupies a uniquely privileged position. As such it is capable of being a source of artistic and cultural excellence. It has the ability to produce a range of its output unrivalled by any other radio station, all without the fear of commercial failure. It should therefore be an object lesson in the value of public service broadcasting.
- 8.3 Indeed for much of the history of the station, Radio 3 has stood alone in providing a platform for such content in UK broadcasting and played a complementary role to other services, while delivering a range of original content. However, due to its size and influence, Radio 3 must also be mindful of its potential market distorting role in terms of commissioning, broadcast and promotion of classical music.
- 8.4 In radio this means ensuring a clear separation in terms of remit and programming from its commercial radio competitor, Classic FM. Radio 3 and Classic FM are the only radio stations that primarily broadcast classical music in the UK, operating in a market of two. In these circumstances it is essential that these radio stations play complementary roles.
- 8.5 Classic FM has succeeded in developing a unique and successful commercial model, pioneering a range of successful programming techniques as a means of broadening the appeal and accessibility of classical music to an audience of 5.4 million listeners each week.

- 8.6 **Radio 3 has undoubtedly drifted towards the more populist approach of Classic FM.** This follows contradictory signals from then BBC Trust in its last service review in 2011⁸⁷. At that time the Trust stated that while it might be tempting for Radio 3 to actively target listeners *‘by abandoning its commitment to a wide range of challenging music, or by playing much shorter excerpts of orchestral pieces...such an approach would significantly jeopardise and damage those elements that make Radio 3 distinctive and highly valued’*. This position was welcome, but appears to have been undermined by the Trust’s endorsement of the broad strategy to make Radio 3 *‘more accessible and welcoming’*, particularly in peak times.
- 8.7 Instead of continuing to offer a markedly different service, which would augment the artistic depth and breadth of classical music broadcasting (and provide the greatest possible choice for listeners), Radio 3 has been permitted to make gradual programming changes to ape the programming pioneered by Classic FM as a means of trying to make the station more popular. In the process this has gradually eroded the clear gap between Radio 3 and Classic FM, reducing the choice available to listeners. Examples of these changes are outlined below.
- 8.8 Radio 3 should reverse these changes, in order to re-establish its distinctiveness during peak time and not just during off-peak periods. It must re-focus on what makes it a distinctive service – its emphasis on live and specially recorded classical music, its promotion of less familiar work and commissioning of new music, its jazz and world music output, and its high quality speech output, including investment in drama and religious programming. **Unless it addresses the changes implemented by Radio 3 we believe that the BBC will be failing in its duty to ‘minimise its negative competitive impact on the wider market’⁸⁸.**
- **Programming changes**
- 8.9 The changes to Radio 3’s output in recent years have been gradual and may appear relatively minor in isolation. However, the cumulative effect over a sustained period has been to profoundly change the character and content of the service.
- 8.10 Examples have included, but are not limited to:
- An increase in the number of shorter works or extracts of works during the peak breakfast and drive periods, with a reduction in the number of multi-movement pieces being played in full
 - A new focus on ‘lighter’ repertoire, including increased airplay for film soundtracks within stripped sequence programmes (these are programmes where a series of CD recordings are played one after another with short excerpts of speech in between each track)
 - Far greater interaction from listeners, including requests, dedications and on-air telephone calls
 - Reduced commitment to a specialist Early Music programme (halved in September 2013)
 - Radio 3’s longstanding commitment to broadcast opera live from the New York Met on Saturday evenings was axed in September 2013
 - Radio 3’s Sunday night drama output was moved into a late night slot in September 2013
- 8.11 In addition, Radio 3 has introduced features and special programming pioneered by Classic FM in the area of classical music radio. These include:
- A ‘CD of the Week’ on the new *Essential Classics* morning programme (launched in September 2011)

⁸⁷ BBC Trust, [Service Review: BBC Radio 3, BBC Radio 4 & BBC Radio 7](#), February 2011.

⁸⁸ Cornerstones of BBC Competitive Impact and Fair Trading Policy.

- The introduction of a weekly album sales chart by BBC Radio 3 at the beginning of 2010
- The introduction of listener voted polls to BBC Radio 3 (e.g. The Nation's Favourite Aria in 2011)
- The introduction of daily interactive Listener Request programmes
- The extension of classical music concert programming between 9pm and 10pm, with a consequent removal of speech-based programming from this hour
- The introduction of a new film music programme on Saturday afternoons at 4pm in September 2013

• Listener response

- 8.12 A range of comments from long-standing Radio 3 listeners would indicate that these programming changes have not gone unnoticed by the audience. These have included listener groups such as the Friends of Radio 3⁸⁹, as well as critics and opinion formers⁹⁰.
- 8.13 In order to assess the impact of the creeping popularisation of Radio 3's programming techniques and the perspective of the audience, BDRC Continental also conducted a survey of Radio 3 and Classic FM listeners. We understand that this information will be submitted to the Trust directly by Classic FM.
- 8.14 When considering the views of Radio 3 listeners only (rather than a broader sample) on the station's programming, there were a number of key findings, including:
- A significant proportion (33%) of listeners to peak time shows, such as the Radio 3 breakfast show, have noticed a change in output.
 - Overall, breakfast show listeners were more likely to recall populist programming techniques than key elements of Radio 3's public service output.
 - When asked what they remembers from the breakfast show
 - 20% said listener calls, 21% said celebrity interviews and 25% said listeners' requests/dedications.
 - This was higher than 11% who said jazz, 13% who said music by new artists and 17% who said world music.
 - Only a very small proportion of listeners to Radio 3 could name any drama/ plays (12%) or religious shows (17%).
 - There were also relatively low scores for shows providing key elements of the music output – including world music (15%) or jazz (23%).

Stimulating creativity and cultural excellence

- 8.15 Most of the key service licence conditions that Radio 3 is required to meet are captured under this heading – including quotas for live or specially recorded music (40%), the number of specially recorded performances (400), new musical works to be commissioned (20) and total number of new drama productions (25). Radio 3 consistently meets these targets and we see little value in making small incremental changes to these criteria.

⁸⁹ Sarah Spilsbury, '[Radio 3 is letting its listeners down](#)', *The Guardian*, 5 October 2011.

⁹⁰ Michael White, '[Why Radio 3 is out of tune with its listeners](#)', *The Telegraph*, 31 January 2014.

- 8.16 Instead the service licence should be amended to address the challenge of providing a broader range of Radio 3 programming to listeners across the schedule. As part of the last review of Radio 3, we proposed a specific change to the service licence that would require Radio 3 to broadcast a full range of programming on the station (including jazz, world music, drama, the arts and ideas and religious programming), between 10.00 and 19.00 Monday to Friday. The Trust rejected this approach, as it felt that the wholesale introduction of all these elements into daytime would be disruptive and ‘unlikely to bring additional audiences to this content’⁹¹.
- 8.17 However, there are creative ways that a station like Radio 3 would be able to repackage some of this content so that it is suitable for daytime and peak time listening. Therefore, we propose that this issue is examined further and addressed in a manner suitable for Radio 3 and its audience (see below).
- 8.18 This would, by definition, bring this content to larger audiences. At present only 4.8% of Radio 3’s listening hours are between 10pm and 12.30am⁹², the period at which it schedules some of its most unique programming, including World on 3, Jazz on 3, Drama on 3 and Late Junction (as well as distinctive speech output such as Free Thinking, The Essay and The Verb). It is therefore unsurprising that audience research found only a small proportion of listeners to Radio 3 can name any drama/ plays (12%), or even shows providing world music (15%) or jazz (23%).

Promoting education and learning

- 8.19 Educating listeners about music and arts should also be a key purpose of Radio 3. However, the BDRC survey of Radio 3 listeners found that a minority (42%) of the audience agreed that the station ‘informs and educates the public’.
- 8.20 The key condition for Radio 3 under this heading is the delivery of 30 new documentaries on arts and cultural topics each year. While it will always ensure that this target is met, we would also question the impact of these programmes. Only 1 in 10 listeners (10%) could name a documentary on Radio 3. Better scheduling and promotion of this distinctive, high value, cultural content would also assist with this.

Reflecting the UK’s nations regions and communities

- 8.21 Radio 3 should continue to emphasise the BBC’s commitment to broadcasting concerts and events from venues across the UK. Radio 3 currently exceeds its requirement of 40% of relevant spend being outside the M25 (43% in 2013). Therefore the Trust should ask BBC management to consider extending the current target further, ultimately to over 50%.
- 8.22 There should also be a stronger and clearer commitment to religious services with a strong musical element, with the introduction of a service licence condition to safeguard this commitment.

Bringing the UK to the world and the world to the UK

- 8.23 The commitment to world music, both within this service licence heading and in the description of the station’s overall remit, mean that it should be a defining element of what

⁹¹ BBC Trust, [Service Review: BBC Radio 3, BBC Radio 4 & BBC Radio 7](#), February 2011, p. 37.

⁹² Rajar, Q2 2014.

makes Radio 3. However, there is no service licence condition to define and guide how this general commitment should be delivered. As a result, some listeners appear to feel that world music is somewhat marginalised.

8.24 Indeed only 15% of Radio 3 listeners could name a world music show in the BDRC survey. Moreover, there is a clear impression at peak times that world music is secondary to standard or populist programming techniques. For example, listeners to the Radio 3 breakfast show more likely to remember listener calls (20%), celebrity interviews (21%) and listeners' requests/ dedications (25%) – than they were world music (17%).

8.25 There should also be a stronger and clearer commitment to world music, with the introduction of a service licence condition to safeguard this commitment.

Sustaining Citizenship and Civil Society

8.26 Radio 3 should continue to provide regular news bulletins throughout the schedule. While this is not a core element of its overall provision, its value at key times of the day should not be underestimated. According to BDRC research, listeners to the Radio 3 breakfast show reported 'news' (41%) as the element of the show they most remembered after 'classical music' (59%).

Emerging communications

8.27 Around 37.4% of listening hours to Radio 3 are on digital radio. This is a relatively high proportion compared to other national BBC services and its contribution to digital radio listening is welcome.

8.28 However, more broadly we would ask the Trust to consider providing clearer parameters for Radio 3, and the BBC in general, regarding the digital distribution of classical music. The BBC's ability to provide such content freely, through streaming, podcasting or downloads has the ability to impact on an important and established market. Therefore we believe that it would be valuable to highlight the obligation on Radio 3 to be mindful of its requirement to consider the BBC Fair Trading Guidelines when considering offering products or content in this area.

Service licence recommendations

- Radio 3 should repackage a broader range of its content so that it jazz, world music, drama, arts and religious programming and incorporate this in daytime and peak time listening
- Radio 3 should be required to meet a target for religious services with a strong musical element
- Radio 3 should be required to meet a target for world music output
- The Trust should ask BBC management to set a target for growing its proportion of relevant spend outside the M25 to 50%
- In order to highlight the BBC's responsibility consider the market impact of distributing classical music content digitally (and freely), Radio 3's service licence should include a specific reference to the BBC Fair Trading Guidelines



Previous Trust recommendations	Current status
'New music' definition be broadened to include underground and emerging tracks from UK artists.	Change implemented. No significant impact on overall range and distinctiveness of music output
Approved management plans for a reduction in volume and format of news	Reduction in commitment to news output

- 9.1 **1Xtra is proving that it is possible for a BBC music radio station to serve a young target audience of 15-24 year olds.** The mean average age of its listeners is currently 24 years old (when including all those individuals who are 10+). It also serves a relatively high proportion of minority ethnic listeners – with 32% of its audience being from non-white backgrounds, compared to only 8% across BBC radio as a whole⁹³.
- 9.2 The station has seen a significant growth in audience reach and hours in recent years, rising from 634,000 listeners in Q2 2009 to over a million listeners and currently standing at 937,000 in Q2 2014 – a rise of 48% over a 5 year period. This is broadly in line with the growth in audience reach of digital radio across the same period (up by 53%), but it is also an indication that the station is becoming more established and benefiting from increased awareness. The challenge for 1Xtra will be to ensure that it does not become too concerned with seeking further audience growth, or simply increasing its popularity, at the expense of the core public value output and the distinctiveness that it is required to provide.
- 9.3 1Xtra should be able to demonstrate that it is extending itself in the delivery of unique content. Otherwise there is a danger that it could start to become too similar to other black and urban music stations. While there is currently a sufficient level of difference between such stations, the BBC Trust should be mindful of the fact that there are also a number of commercial radio stations that also serve a similar audience. Moreover, some of these stations are evolving, with both Capital Xtra and Kiss now available nationally on DAB, with relatively large numbers of online listeners, alongside their FM broadcast base.

Stimulating creativity and cultural excellence

- 9.4 The service licence for 1Xtra states that it is required to make a very important contribution to the public purpose of stimulating creativity and cultural excellence. Specifically, it should be the home of new black music and provide a platform for a range of music rarely heard elsewhere.
- 9.5 According to the current licence conditions the station should ensure at least 60% of music played on the station in daytime is new, and that at least 35% if all music in daytime is from

⁹³ All data from Rajar Q2 2014

the UK. We understand from the latest full year figures⁹⁴ that the station is meeting these requirements, reporting a 60% new music and 43% UK music in daytime for 2013-14.

- 9.6 As part of the last service review of 1Xtra the BBC executive requested a specific change to the definition of 'new music' to allow for underground and emerging UK tracks to be captured within this definition. While this could have been seen as a relaxation of the requirements, it was explained as a way of increasing 1Xtra's contribution to the UK black music industry, enabling a range of such tracks to be included in the schedule more freely.
- 9.7 When these changes to the definition of new music were made, the BBC Trust said that it would seek evidence from BBC management on whether the changes had an impact on black music. We would therefore be interested in the conclusions of this analysis and propose that the Trust makes any such evidence available as part of this review, alongside its own assessment of the impact.
- 9.8 RadioCentre has not conducted specific additional monitoring of these conditions, but we note that 1Xtra does appear to broadcast a relatively large number of unique tracks across its schedule, with around 85% of its total music output not being played across most commercial radio stations, according to data we have received from CompareMyRadio. Even in daytime, 1Xtra manages to be 73.2% distinctive from commercial radio – a further indication to Radio 1 that this can be achieved successfully while retaining a young audience.
- 9.9 However, it should be noted that this calculation does not include data from Kiss, one of 1Xtra's closest commercial competitors. When looking at the specific tracks played by 1Xtra over the same period (July – September 2014) it is interesting to note that its 50 most played songs, were all played on both Kiss and Capital Xtra – with the top 10 tracks played many times more⁹⁵. While the commercial stations undoubtedly have a much tighter playlist, played on higher rotation, the level of distinctiveness between this group of stations may not always be immediately apparent to listeners (particularly to light listeners at peak times who would be more likely to hear most played tracks). Therefore **we would urge the Trust to monitor the overlap between 1Xtra and commercial radio in daytime to ensure the majority of its music output remains distinctive.**

Sustaining Citizenship and Civil Society

- 9.10 In 2009, following the last review of 1Xtra, the Trust agreed to make changes to the format and volume of the station's news output, on the basis that the existing approach was not meeting audience needs.
- 9.11 This led to the removal of the 2 hour afternoon news show, and the introduction of two extended bulletins of 15 minutes. This change was approved on the condition that these bulletins did not simply replicate Radio 1's *Newsbeat* programme and were scheduled for broadcast at different times⁹⁶.
- 9.12 However, following a review of efficiency across the BBC as part of its Delivering Quality First programme, 1Xtra has started to simulcast Radio 1's *Newsbeat* programme. Therefore the 'conditions' laid down by the Trust, which were presumably designed to safeguard the

⁹⁴ BBC, [Performance against public commitments 2013/14](#), 2014, p. 11.

⁹⁵ RadioCentre analysis, based on Radiomonitor data, July – Sept 2014.

⁹⁶ BBC Trust, [Service Review Younger audiences: BBC Three, Radio 1 and 1Xtra](#), June 2009, p. 75.

distinctive tone and nature of news output on 1Xtra, appear to have been entirely disregarded by the BBC in a relatively short space of time.

- 9.13 We believe that this dilution of 1Xtra's speech output is not acceptable and should be reversed as much as possible. Specifically, we believe that it should be required to broadcast a dedicated current affairs programme aimed at and featuring issues of relevance to the target audience every weekday in daytime.
- 9.14 More broadly, the future news provision on 1Xtra should also echo the recommendations we make on Radio 1, to schedule news bulletins and extended bulletins in order to maximise their reach and impact amongst the target audience. A continuous, rolling programme of social action campaigns with clear objectives and relevance to the audience should also be instituted.

Reflecting the UK's nations regions and communities

- 9.15 1Xtra is required to contribute to this public purpose by bringing together the diversity of black music and culture across the UK; broadcasting live music from a wide range of venues around the UK; and using its online presence to support interest in UK black music. Our assessment is that it is delivering this output appropriately, notwithstanding the comments we make elsewhere about the use of more stretching targets and maximising the distinctiveness of music and speech output.

Bringing the UK to the world and the world to the UK

- 9.16 When the Trust reported on 1Xtra's performance against this objective previously, it noted that listeners perceive that its coverage of global issues and music is in line with comparable commercial radio stations. We would question whether this is a sufficiently stretching and suitable benchmark for 1Xtra, and if this perception has improved since that time.
- 9.17 In terms of specific action and opportunities for improvement we would suggest that 1Xtra use an expanded news offering to meet this requirement more effectively, and looks to give a platform to even broader range of unfamiliar and innovative black music from around the world.

Promoting education and learning

- 9.18 Following the last review of Radio 1 and 1Xtra, BBC management stated that it would aim to increase the impact of social action campaigns on these stations. This was, and remains, a laudable goal for BBC radio in general and we would also be interested in the assessment that the Trust has made regarding the impact of social action on 1Xtra, and whether this has increased.
- 9.19 Notwithstanding the conclusions of this assessment we believe that it may be useful to underpin the commitment to social action in the manner we describe above, with a clear commitment in the service licence of 1Xtra to a continuous, rolling programme of social action campaigns with clear objectives and relevance to the audience.
- 9.20 1Xtra is also required to use its online presence to provide vocational advice to those wishing to work in the music industry. The Trust previously requested that the station give this

greater prominence on the station's website. However, this content is still not clear or accessible from looking at the 1Xtra homepage at this point in time.

Emerging communications

- 9.21 Clearly the online and digital presence of 1Xtra will be a crucial part of its future strategy, but at present the BBC Trust does not seek to define what its mission should be, or whether the extent of such activities should have limits or take into account the broader radio market.
- 9.22 As RadioCentre has stated elsewhere in this review, and in our response to the Trust review of BBC Online, the online and digital teams at the BBC often appear to be generating content and products at a different rate to the rest of BBC output. Service licences have little purpose if BBC Management continues to expand services in a manner that is beyond what is prescribed in these documents. Youth services such as 1Xtra need to be monitored especially carefully, and must proceed with caution to ensure that they do not impact upon commercial competitors online, or expand to the point where they prevent growth opportunities for other players in nascent markets.

Service licence recommendations

- BBC Trust to monitor the overlap of music tracks in weekday daytime (7am – 7pm) between 1Xtra and commercial radio
- 1Xtra (along with Radio 1) should provide 4 extended news bulletins each day, at least 3 of which should be in daytime
- 1Xtra should seek to broadcast an accessible programme in weekday daytimes, which covers current affairs and issues of relevance to the target audience with speech content at a considerably higher than the station's normal output
- A continuous, rolling programme of social action campaigns with clear objectives and relevance to the audience should be instituted



Previous Trust recommendations	Current status
Awareness of stations should be improved	Achieved. High awareness following campaign to prevent planned closure
Presenters should have strong musical credibility	On-going. Strong weekend and guest presenters added to weekday line-up
Target should be provided to the Trust for listener levels	Appears to have been achieved (although not made available publicly)
Documentary output to be improved to deliver service licence obligation on understanding popular music and context	On-going. A number of high quality music documentaries have been broadcast, but limited impact due to scheduling

- 10.1 In 2010, the BBC announced the closure of 6 Music but following the reversal of that decision, the audience for 6 Music has grown dramatically. Between 2009 and 2011 its audience reach more than doubled from 640,000 to 1,306,000. It has since continued to grow at a strong rate and now has the largest audience of any digital only radio station in the UK, with comparable audience reach for 2013 of 1,817,000.
- 10.2 The campaign to save 6 Music also mobilised a range of influential listeners and supporters who highlighted the need for a genuinely distinctive BBC radio offering (perhaps reflecting the extent of shift to mainstream output on Radio 1 and Radio 2). The resulting audience increases over the past five years highlight that when BBC services are distinct, they are not just delivering public purpose output, but can also be incredibly popular, even on platforms without universal reach. RadioCentre believes the BBC's national FM networks could learn from this example, by featuring more of the unique elements of their content in peak time, rather scheduling it in off-peak or expecting digital stations to perform this function.
- 10.3 The rapid growth in popularity and audience may, however, pose future challenges for 6 Music. In particular, there could be a risk that continued efforts to grow audience might undermine the unique and distinctive nature of the station. In 2010 the Trust asked BBC management to provide realistic estimates of audience growth for the station, in part to act as a 'check on excessive growth'⁹⁷. We agree that the key measurement of the success of 6 Music should remain its delivery of a unique range and quality of its output, not its total audience reach or listening hours.

Stimulating creativity and cultural excellence

- 10.4 6 Music makes a very important contribution to stimulating creativity and cultural excellence, and clearly seeks to provide different music output to that played on other radio stations.

⁹⁷ p.56 BBC Trust Review of Radio 2 and 6 Music, February 2010

- 10.5 The requirements in its service licence for it to make extensive use of the BBC archive, feature unfamiliar tracks, live music and new artists with limited exposure or commercial support are all important features that contribute to setting the station apart. The output of 6 Music is also effective in meeting its requirement to 'significantly extend the range of music available to its audiences and...increase understanding through the context'.
- 10.6 RadioCentre has not conducted specific additional monitoring of 6 Music as part of this review. But according research from CompareMyRadio, 81% of the tracks played by 6 Music were not played on commercial radio across the week – a higher proportion than any other popular music station in the UK, including Radio 1 and Radio 2. This is a heartening performance and is a strong indication of the capability of the BBC to provide a diversity of music that is not available elsewhere.
- 10.7 During peak periods of listening during weekday daytimes, this level of unique output is not quite as strong. Between 7am and 7pm the proportion of tracks not played on commercial radio falls to 68.8%. While this is lower than the station overall, it is still at a significantly higher than the level of unique music output during daytimes on Radio 1 (40%), Radio 2 (40%). This demonstrates that it is possible for the BBC to produce a diverse yet coherent range of daytime music output, with a majority of tracks that are unique, an approach that we are proposing elsewhere in this document be adopted by the other BBC music networks.
- 10.8 We would also point out that many of the most played tracks on 6 Music seem to be 'new' as defined by the Trust in the service licence – i.e. they are either unreleased or less than one month since release date. 6 Music's service licence condition is to provide '*no more than 30% new music*' across the schedule. We understand from the BBC annual report that it only just meets this objective overall, broadcasting 28.5% new music in 2013-14.
- 10.9 Indeed, new music does seem to continue to be a prominent part of the station output. According to data from Radiomonitor 70% (or 35) of the top 50 tracks played on 6 Music in the month of September 2014 were new according to this definition. Indeed only 5 out of the top 50 tracks were released before June 2014. While this is only a snapshot of the music output of 6 Music, it does seem to be an unusually high emphasis on new music given the remit of the station and the reservations expressed by the Trust previously on this issue. If this trend were to continue unchecked it could lead to a dilution of 6 Music's distinctiveness, enabling it to become a broader version of new and alternative music stations like XFM (on which a significant number of its presenters featured in the past, including Shaun Keavney, Lauren Laverne and Mary Anne Hobbs).
- 10.10 Against this background, while **we are only proposing limited changes to the service licence of 6 Music**, these amendments (below) are designed to ensure that it is being challenged sufficiently to deliver the objectives set down by the Trust. This includes a proposal to ensure that 'new' music remains an important, but minority, part of the station's output. It also includes a proposal to ensure that the conditions continue to reflect the aspiration to make 'extensive use' of the BBC archive, which was one of the founding principles upon which 6 Music was established and should not be lost.

Promoting education and learning

- 10.11 6 Music is required to feature at least 10 hours a week of speech-based features, documentaries and essays on average across the year.

- 10.12 During the previous review of 6 Music in 2010 the Trust noted that its documentary output was 'not meeting audience expectations'⁹⁸ and that the station should seek to address this shortfall. We propose that the Trust revisit this issue to establish whether audience perceptions have changed in the intervening period.
- 10.13 One of the most effective ways of increasing the impact of this output would be to increase its prominence in the schedule. The current practice of broadcasting most of the station's documentary output overnight may be hindering it in this regard. The Trust should propose that the station seeks alternative ways of utilising this content during daytimes and weekends.

Sustaining Citizenship and Civil Society

- 10.14 6 Music is required to provide 6 hours of news each week on average, and according to the BBC annual report it delivers 6 hours 10 minutes. It is also required to explore the relationship between music and society, although there are no specific conditions or apparent means of measuring this contribution.
- 10.15 RadioCentre does not have any detailed comments on 6 Music's delivery of these objectives, other than to say that this should continue to be part of the station's overall responsibility. In common with other music stations it should schedule news, documentaries and social action output in such a way to maximise the reach and impact amongst its target audience. Hourly news bulletins should also remain part of the output throughout the schedule, during weekdays and weekends.

Reflecting the UK's nations regions and communities

- 10.16 6 Music is required to stimulate, support and reflect the diversity of cultural activity in the UK. Its coverage of live music and festivals should also be reflective of the UK. However, the Trust does not require the delivery of specific conditions to support this.
- 10.17 In its last service review of 6 Music in 2010 the Trust highlighted audience research, which found some of the lowest performance scores were related to diversity. Consequently it asked the station to boost its appeal to older people, listeners from lower income households, to women and to ethnic minorities. It also stated that there was scope to better reflect musical creativity from different parts of the UK. We will be interested to know whether the Trust believes that progress has been sufficient in this regard.
- 10.18 RadioCentre would simply make two observations relating to this objective. Firstly, in common with a number of BBC stations, we would question whether there is scope to seek greater diversity in the presenter line-up of the station so it is more representative of the UK's nations, regions and communities.
- 10.19 Secondly, while 6 Music is capable of providing exemplary coverage of live music and festivals, such as Glastonbury, this may be to the detriment of its broader coverage of festivals, and severely distorts the market, preventing commercial operators from gaining a foothold. There is no basis for 6 Music to dominate coverage of such mainstream festivals as Glastonbury, T and Latitude to the detriment of commercial stations. Instead, the station should extend its role in covering other smaller festivals and live music events across the UK ⁹⁹.

⁹⁸ p.52 BBC Trust Review of Radio 2 and 6 Music, February 2010

⁹⁹ The recent 6 Music Festival appears a good example of this. <http://www.bbc.co.uk/events/e8gmj>

Bringing the UK to the world and the world to the UK

- 10.20 6 Music has a general requirement to cover international music events and ensure its music news and documentaries have international scope. This is a fairly general commitment, with no measurable criteria, which probably does very little if anything to shape the output of the station.
- 10.21 The Trust may wish to consider amending this requirement slightly to be clear that 6 Music has an obligation to showcase global musical talent and styles from the 1960s to the present day, with a focus on archive recordings, innovative and influential artists (who are in keeping with the alternative spirit in popular music that is celebrated by 6 Music).

Emerging communications

- 10.22 In common with several other BBC music radio stations, the service licence requirement for 6 Music within what it should do to promote emerging communications is so broad as to be almost meaningless.
- 10.23 There remains a strong case to argue that that the station should play a significant role in promoting the benefit of emerging communications technologies and services. Its unique offering has already strengthened the national DAB platform immeasurably, which has in turn benefitted commercial services looking to launch nationally. The question we would pose to the BBC Trust is whether this role should be better defined and considered in the future.
- 10.24 Clearly the online and digital presence of 6 Music will be a crucial part of its future strategy, but at present the Trust does not seek to define what its mission should be or whether the extent of such activities should have limits or take into account the broader radio market.

Service licence amendments

- The Trust should require 6 Music to provide realistic estimates of audience growth during the next 5 years
- 6 Music should reduce its cap on new music from no more than 30% to no more than 25%
- 6 Music should increase its output from the BBC archive from 15% to 25%
- 6 Music should consider ways of repackaging some of its documentary and speech output for broadcast as part of daytime or weekend schedules.
- 6 Music should ensure that hourly news bulletins remain part of the schedule during weekdays and at weekends
- 6 Music should demonstrate greater diversity in its presenter line up
- 6 Music should cease from taking such a dominant role in covering mainstream music festivals – and should explore ways in which it might support smaller or regional events
- 6 Music should focus on the archive recordings and alternative or innovative artists when providing a platform for global musical talent



Previous Trust recommendations	Current status
It should shorten and simplify its schedule	Appears to have been delivered, but the loss of some unique content (e.g drama) has reduced distinctiveness.
Primary focus should be on British Asians under 35 (but with a 'friend of family' strategy)	Seems to be adopting this approach, although an undue focus on young audiences risks duplicating the commercial sector
Strong documentary output with wide appeal	On-going. Some fine examples of documentaries that have had broader resonance
Approved management proposal to increase music to 60%	Changes in balance of music and speech introduced October 2012

- 11.1 Due to a combination of declining listeners and escalating costs, Asian Network was earmarked for closure by the former BBC Director General in 2010 along with its sister digital station, BBC Radio 6 Music. Like 6 Music, the decision was eventually reversed following a protest from listeners, although this is where the similarities end.
- 11.2 While BBC 6 Music attracted waves of support from listeners and celebrities including David Bowie, the campaign to rescue Asian Network was less vociferous. Ultimately the service was saved due to cost-cutting of 34%, which meant a reduction of around half its staff.¹⁰⁰
- 11.3 The Trust felt that continuing on such a high cost per listener was not a viable option for Asian Network, so a proposed reduction in broadcast hours combined with significant programming changes was deemed acceptable. These changes were designed to enable the station to appeal to a wider audience of British Asians and those interested in Asian culture, in order to demonstrate that the station was appropriate value for money.
- 11.4 RadioCentre has consistently argued that BBC stations should not be evaluated by cost per listener, but by the quality and distinctiveness of its output. Our response to the proposed changes in 2011 underlined concerns that the format changes resulting from any cost-cutting strategy would ultimately remove quality programming, reduce the distinctiveness of the service and impact commercial broadcasters detrimentally.¹⁰¹

¹⁰⁰ Steven Swinford, 'BBC faces Christmas strike', *The Telegraph*, 18 November 2012.

¹⁰¹ [Response to the BBC Trust's service licence review of Asian Network](#), RadioCentre, December 2011.

- **Audience**

- 11.5 According to the 2011 UK Census, there were 4.4 million individuals of Asian ethnicity in the UK representing around 6.9% of the population, although the vast majority of these (more than 3 million) are located in England and Wales.¹⁰² Around two-thirds of the Asian population in the UK is under 40 years old according to Rajar monitoring.
- 11.6 While the population of the UK is becoming increasingly diverse, the Asian population still mainly resides in urban centres. In radio this market is well catered for by the commercial sector, with a number of local stations targeting the same demographic (and complementing the growing number of community stations) where they reside.
- 11.7 Since the changes to Asian Network, audiences for the station have increased by 22% across all age groups, and now sit at 618,000: 85% of which are of Asian ethnicity – who listen to 90% of all the radio consumed on the station. The average age of an Asian Network listener is 35, which reflects that about two-thirds of the core audience is under 40.

- **Distinctiveness**

- 11.8 At the time of the most recent prescribed service changes, the Trust emphasised that the challenge for the station over the next few years would be to preserve the distinctiveness of the service and continue to improve quality, while reaching new listeners and continuing to deliver value for money.¹⁰³ Ultimately the cuts to Asian Network had the opposite effect, making the service more like commercial offerings. In an explicit attempt to grow audience and protect the service from further threats of closure, Asian Network has lost some of its more distinctive language and drama commitments in favour of more mainstream music and entertainment content.
- 11.9 Similarities around content and talent, which had existed previously between Asian Network and commercial radio equivalents, have multiplied further. In an attempt to attract the largest proportion of Asian listeners – those under 40 which are of importance to advertisers and therefore targeted by the commercial market – further commercial radio broadcast talent was employed, while Bollywood tracks and entertainment chat replaced more diverse music and specialist language content.
- 11.10 These content changes have had a direct impact on the Asian commercial radio sector. Already struggling with ongoing financial pressures from a recession and increasing local advertising competition, the increased popularity of Asian Network has further weakened the market. Since the previous review, Sunrise Radio, the major Asian commercial radio network, had to declare bankruptcy as reduced audiences meant a further drop in ad revenue.¹⁰⁴
- 11.11 **The BBC Trust needs to seriously re-evaluate the purpose and target audience of the Asian Network.** No other single BBC Radio service is so purposeful in its efforts to replicate the commercial radio audience, nor has such a dramatic impact on commercial radio equivalents. Once, Asian Network was the pre-set of choice for first generation parents tuning in for a couple of hours of *filmi* hits and *desi* chatter every week. The station has since set itself the mammoth task of chasing second-, third- and fourth-generation British Asian audiences, too. It does not need to seek such broad appeal.

¹⁰² [UK Census](#), Office for National Statistics, 2012.

¹⁰³ 'Trust's service review of BBC Asian Network', BBC Trust, 16 May 2012.

¹⁰⁴ Raj Baddhan, '[Avtar Lit declared bankrupt by High Court](#)', *BizAsia*, 9 April 2014.

- 11.12 RadioCentre believes that if Asian Network is going to have a distinct and worthwhile impact on the wider BBC audience, and be true value for money to the licence-fee payer, several changes need to be made. While the vast majority of these changes will be content responsibilities, most significantly we believe the Trust should re-evaluate the entire purpose of Asian Network, so it no longer targets British Asians under 35.
- 11.13 **Asian Network should target Asian listeners over 40 years old who are not catered for anywhere else by the BBC or the wider UK Radio market.** We have already mentioned in other areas of this response the BBC's longstanding inability to attract ethnic minorities on every station except Radio 1Xtra. While Asian Network's ability to attract its target market counters that trend, it should be something more than a token service to balance out the BBC's failures in other areas. Instead British Asian content for young people should be moved to Radio 1 and 1Xtra, boosting the diversity of those services, so that content which appeals to older Asian listeners not catered for by commercial operators has more prominence on Asian Network.

Sustaining citizenship and civil society

- 11.14 RadioCentre continues to support the Trust's efforts to focus on areas where the station adds most value for licence-fee payers and is truly distinctive, such as eyewitness reportage; international newsgathering; specialist analysis and explanation; investigative journalism; and current affairs.
- 11.15 Asian Network is tasked with meeting the service licence condition to deliver a 50/50 split of speech and music. The BBC delivers acclaimed speech content across all its music services and Asian Network is no exception; the station being nominated for a station of the year in the 2013 Radio Academy Awards on the back of such shows as Nihal's afternoon programme, which was an essential listen for the recent debates around the recent problem with Rotherham's child services in ethnic communities.
- 11.16 However, since the financial cuts, editorial content of the station has expanded indefinitely outwards to encompass all types of entertainment speech radio, rather than the journalism and debate which is strictly in line with Asian Network's public purposes. The majority of speech is mainly made up of news and entertainment, with shows such as the 10am-1pm Saturday slot featuring Bollywood news, celebrity interviews and music becoming more commonplace in the schedule.

Stimulating creativity and cultural excellence

- 11.17 Asian Network has several commitments with regards to music and culture. It should cover a wide range of genres with an emphasis on new music and British Asian artists, and on nurturing and developing new acts. However, music on Asian Network is dominated by the Bollywood genre, and the Trust should set commitments for increased non-Bollywood music in the licence.
- 11.18 The music-led programming on Asian Network is both cutting edge and award winning. Talent like Bobby Friction have a key role to promote new music talent and music styles that are important in targeting the under 35' audience. However, because of the crossover with the Radio 1 audience, these shows (some of which originated on Radio 1) may now find a more natural home on 1Xtra as part of the BBC's new urban music offering.

- 11.19 It has been promising to see the station recently commissioning dedicated comedy and drama programmes featuring BBC talent such as comedy actress Meera Syal. Since the end of *Silver Street* in 2009, there have been no regular arts or drama coverage on the station and the Trust needs to encourage a return to this unique content.

- **Events**

- 11.20 **Asian Network invests too much resource in sponsoring live events**¹⁰⁵. It continues to directing resources on exclusive sponsorship of Asian Festivals, particularly the large-scale appeal of what the station terms its “now traditional Summer of Melas,”¹⁰⁶ prioritising these events to the less popular festival such as Divali, which is not covered by the Network.
- 11.21 Not only does RadioCentre submit that a pre-occupation with mainstream cultural events is to the direct detriment of funding which otherwise would go on more distinctive content, we believe Asian Network’s direct intervention in this space brings into question the BBC’s wider fair trading responsibilities to ‘minimise its negative competitive impact on the wider market’.
- 11.22 Melas are the most prized parts of the Asian cultural schedule, and the Network dominating the sponsorship is not only unnecessary, but detrimental to the wider market. It should be noted that this sponsorship is an exclusive tie up: no other broadcasters have had the opportunity to sponsor the London Mela since Asian Network took over the contract in 2006, despite Sunrise Radio helping to set-up the initial London event. The Trust should encourage the Network to relinquish these exclusive agreements.
- 11.23 Moreover, we are concerned that Asian Network’s promotional practices are contradicting BBC policies on endorsement. Having intimate relationships with commercial interests means the station need to tread carefully to avoid the perception that the BBC is endorsing third party trading activities. However, DJs read out pre-prepared marketing material about the price and location of commercial products and events on a regular basis. On Friday 22nd August at 5pm an artist by the name of Rahat Fateh Ali was explicitly promoted. More recently, on Saturday 1st November, presenters Panjabi Hit Squad were promoting their commercial club night in Birmingham that same night.

Reflecting the UK’s nations, regions and communities

- 11.24 The current service licence conditions mean that Asian Network should broadcast at least 20 hours of language programming each week, including a mixture of Hindi/ Urdu and English and other regional languages. This is a considerable relaxation of previous specified rules regarding language programming on the service.
- 11.25 **The BBC is now underserving Punjabi, Mirpuri, Gujrati and Bengali speakers**, and this is a direct result of the Trust permitting a reduction of specific language requirements on Asian Network. Indeed, minority cultures as a whole are now being underserved to the extent that there are now examples of complete misunderstanding of less mainstream Asian communities.¹⁰⁷ RadioCentre believes that this balance should be readdressed and the

¹⁰⁵ The station was at 160% the amount of required events in its service licence in 2013. BBC, [Performance against public commitments 2013/14](#), 2013, p. 13.

¹⁰⁶ Roy Martin, [‘Stars join BBC Asian Network line-up’](#), *Radio Today*, 16 April 2012.

¹⁰⁷ John Bingham, [‘BBC expresses regret over suggestion Sikhism is ‘made up of other religions’](#), *The Telegraph*, 14 May 2012.

commitment to specific language programming reinstated to the service licence, possibly with regional opt-outs to maximise the effectiveness of this programming. We discuss this in more detail below.

Bringing the UK to the world and the world to the UK

- 11.26 While the Asian Network is the main cultural conduit for visiting stars from the Indian subcontinent, with all Bollywood actors using the station to make promotional visits, the distinct documentaries and current affairs programmes on the station provide better demonstrations of helping British Asians connect with their roots.
- 11.27 The BBC has access to one of the largest and most respected newsgathering operations in the world. RadioCentre strongly supports Asian Network's efforts to use this position to focus increasingly on areas where it adds most value and is truly distinctive, such as eyewitness reportage; international newsgathering; specialist analysis and explanation; investigative journalism; and current affairs. We believe that Asian Network should seek to do much more to make the most of its already established links with BBC News and the World Service to enhance this roll: and feature more hard news on the Network than the current tendency to feature entertainment content.

Emerging communications

- 11.28 As a dedicated DAB-only station, Asian Network has a responsibility to encourage radio listeners onto the platform. However, currently the reach of the station has different levels of success depending on the areas of broadcast, with the majority of the station's reach coming from the North-West, Midlands and London (reflecting the demographic of these regions). Consideration should be given to the most effective broadcast platform strategy for Asian Network, as well as ways in which its online content can complement its unique output most effectively.

Service licence recommendations

- Asian Network should be required to serve Asian listeners over 40, who are not catered for elsewhere on the BBC or commercial radio
- Asian Network should be required to broadcast comedy and drama output of particular appeal to Asian audiences
- Broadcast rights for events should not be acquired on an exclusive basis
- A limit should be set on the amount of Bollywood music played on Asian Network, which is ideally less than 25% of total
- Asian Network should be required to provide dedicated programming for Punjabi, Mirpuri, Gujrati and Bengali speakers

ABOUT RADIOCENTRE

- 12.1 RadioCentre is the industry body for commercial radio. It represents a range of commercial radio groups and stations from independent, small-scale ventures, to household names serving major metropolitan areas. RadioCentre's member companies operate 276 licensed radio stations across the UK, through 45 different businesses, which represent 90% of commercial radio in terms of listening and revenue.