



## **REACH NOT REITH**

# **How changes at Radio 2 have undermined the delivery of the BBC's public purposes**

**RadioCentre's response to the BBC Trust's Review  
of Radio 2 and 6Music**

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## 1. EXECUTIVE SUMMARY

### 1.1. Radio 2 is the nation's favourite radio station but, despite this, over the last decade, it has prioritised popularity over public purposes, and favoured younger listeners' tastes over those of older listeners.

1.1.1. 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 driven its audience younger and thereby generated audience scale within the heartland audience of Commercial Radio. This has proved disastrous for Commercial Radio's audience share and for the plurality and diversity of the UK's fragile radio ecology. Radio 2's audience and output has changed beyond all recognition over the past decade. This could have been a good thing, but it has not been.

1.1.2. In this submission to the BBC Trust's review of the Radio 2 and 6Music service licences, we examine changes in audience, delivery of the public purposes and value for money.

1.1.3. We conclude that the BBC's portfolio of popular music radio stations is inappropriately skewed in its appeal to younger audiences; that 6Music is unnecessary; and that Radio 2, Britain's biggest radio station, is both missing an opportunity to serve older audiences and encroaching too overtly on the heartland audience of the commercial sector.

### 1.2. BBC music radio is too focused on youth audiences and is therefore failing properly to serve older listeners.

1.2.1. Radio 2 is licensed to serve "all age groups over 35". However, over the last decade, Radio 2's audience has migrated increasingly younger and has not reflected changes in the UK population.

- Radio 2's total reach has grown from 20.3% in 1999 to 26.2% in 2008<sup>1</sup>. However, over the same period, reach has declined amongst listeners aged 65+. **The strongest growth has come from the demographic outside the station's target audience:** reach amongst 15-34s has grown by 62% since 1999.
- This pattern is replicated when considering audience share. Radio 2's share of 15-34 listening has grown by more than 66% since 1999. Share amongst 55+s has declined.
- The BBC prefers to measure Radio 2's demographic performance by quoting the average age of the Radio 2 audience. However, since 1999 the average age of a Radio 2 listener has fallen from 53 to 50. This is despite an ageing UK population, with the average age of UK citizens who are 35+ (Radio 2's target demographic) rising to 54 in 2007.
- Listening data shows that compared to 1999, today's Radio 2 listener is more likely to listen to Radio 1 (which is tasked with targeting 15-29 year olds) and less likely to listen to Classic FM and Radio 4 (stations of greater appeal to older listeners).

1.2.2. 6Music's audience has also migrated younger.

- Since it was launched in 2004, the station's average age has dropped from 37 to 35, and 85% of its listening hours now come from under 44s<sup>2</sup>.

1.2.3. Changing programming policies account for these demographic shifts in the stations' audiences.

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<sup>1</sup> Throughout this submission, when referring to listening trends, we quote data taken by comparing the annual average for each full year from 1999 to 2008 as generated by RAJAR (RAJAR 1999-2008). This has the benefit of ensuring that any quarterly deviations are smoothed. However, when considering current listening, we quote RAJAR data for Q1 2009 (RAJAR Q1 09).

<sup>2</sup> RAJAR Q1 09

- The BBC's own research<sup>3</sup> has found that Radio 2 now plays more new<sup>4</sup> music than music recorded before 1980 and that almost 40% of its music comes from the past nine years. Almost all of its newly-hired presenters are of particular appeal to younger listeners. Programmes playing music of particular appeal to older listeners are rare, and those which do exist are marginalised in the schedule.
- Although originally licensed to play popular music from the 1970s to the 1990s, 6Music is now permitted to select half of its music from the last four years.

1.2.4. In the context of a BBC Radio portfolio of stations which also includes Radio 1 and 1Xtra, the BBC is failing to provide popular music radio which is of particular appeal to those older than 'the pop generation'<sup>5</sup>. Its two digital-only music stations both serve younger listeners, with Radios 1 and 2 now also clustering in the centre ground. The wider radio market inevitably provides less music radio choice for older listeners because Commercial Radio stations need to deliver the 15-44 demographic that advertisers are keen to reach.

1.2.5. RadioCentre therefore recommends that the BBC Trust should:

- Require Radio 2 to better serve all of the 35+ audience stipulated by its service licence, and reverse the decline in listening amongst older listeners. This should include incorporating within its schedule programmes of particular appeal to older listeners.
- Rebalance the BBC's portfolio of music stations by repurposing 6Music as a digital radio station playing music of particular appeal to those whose musical tastes were formed before 1960 (likely to be aged 65 or over), thereby ensuring that BBC Radio's portfolio of music radio stations better serves all radio listeners.
- Require Radio 2 to adopt many of the current programming characteristics of 6Music.

### **1.3. The Service Licences, and in particular their 'conditions', are insufficiently precise to enable either effective regulation by the Trust or certainty of decision making by management**

1.3.1. Expert analysis by an independent radio programmer has concluded that the conditions within the Radio 2 service licence are so imprecise that Radio 2 could either almost exactly mirror the output of:

- the London easy listening station Magic 105.4; or of
- the London dance music station Kiss 100.

### **1.4. BBC Radio's policy of generating listening 'scale' during peak listening times in order to drive listening to public purpose elements off peak is failing.**

1.4.1. Radio 2 is certainly successful at generating scale in daytime: its peak audience share of listening is almost 20%. However, in the 10pm to midnight slot, this falls to below 7%<sup>6</sup>. Yet this is the slot in which Radio 2 chooses to schedule its arts programming.

1.4.2. Conversely, flagship programmes with high audience share at breakfast and drivetime contribute little to the public purposes in their speech output. During the week of monitoring analysed by RadioCentre, other than news bulletins and travel reports which are common to almost every UK radio breakfast show, speech promoting the public purposes represented just 2.3% of the content of the Terry Wogan show.

<sup>3</sup> Intelligent Media Music Analysis for BBC Audio & Music, November 2008

<sup>4</sup> pre-release or up to 6 weeks after release

<sup>5</sup> People whose musical tastes were formed from c.1958 onwards

<sup>6</sup> RAJAR Q1 09

1.4.3. A new approach is needed. We urge Radio 2 to consider the example set by Radio 4 which schedules highly challenging material such as 'In Our Time' at 9am, and includes highly popular material such as 'The Now Show' and 'The Archers' in the evening.

### **1.5. Radio 2 is missing its target for news and current affairs output.**

1.5.1. Monitoring of Radio 2 has found that the station is not meeting its service licence requirement to deliver 16 hours of news and current affairs output every week.

- Radio 2 delivered less than 11 hours of news and current affairs output during the week of monitoring analysed by RadioCentre.
- Only if items such as presenters reading items from newspapers, a discussion about snoring, a Monopoly championship and discussions about teleshopping and the pressures of TV talent shows were categorised as 'news and current affairs' did the station achieve its 16 hour target.

### **1.6. The BBC Trust should employ a range of methods when assessing the value for money of BBC radio services**

1.6.1. BBC Radio stations cost, in absolute terms, a great deal of money. There has been little public explanation of why this is the case and what public studies do exist (such as those conducted recently by the NAO) raise more questions than they answer.

1.6.2. There is no apparent reason, for example, why 6Music should cost almost five times more than Planet Rock to run, why Radio 2 should cost almost six times more than 6Music to run, or why the typical cost of a Radio 2 programme should be 54% higher<sup>7</sup> than a similar show on Radio 1. We recommend that the BBC should conduct a 'bottom-up' evaluation of what amount of money is actually needed to deliver the public purposes.

1.6.3. In addition, it is not appropriate to continue to use cost per listener hour as the sole value for money performance metric for BBC Radio Services, not least because it encourages BBC management to grow audience share (i.e. listening hours) rather than reach; and, as the NAO points out, "a station could have a low cost per listener hour without necessarily being efficient"<sup>8</sup>.

1.6.4. The BBC Trust should urgently progress benchmarking with the commercial sector as well as other methods of assessing value for money.

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<sup>7</sup> National Audit Office, 'The efficiency of radio production at the BBC', January 2009, pg.5

<sup>8</sup> National Audit Office, 'The efficiency of radio production at the BBC', January 2009, p.12

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