1. Headlines

1.1 What do Radio 1 and Radio 2 listeners think?

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

**Listeners think Radio 1 and Radio 2 should be more distinctive**

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

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

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

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

Radio 1 listeners:

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

Radio 2 listeners:

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

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

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

2.1 Content – Radio 1

Only a third of Radio 1 listeners (33%) thought that BBC Radio was different to commercial radio and only 23% thought that it informed and educated the public. When asked about specialist shows broadcast on Radio 1 very few listeners could remember any:

- 14% arts /culture or documentaries
- 13% comedy shows
- 22% specialist music shows

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

Among Radio 1 listeners, there is a strong perception that Radio 1 is just like any other station. The majority of Radio 1 listeners didn’t think that it was unique and different (only 42% thought it was) 60% of listeners identify Radio 1 with playing chart music; 42% thinking that it played the same music as other stations (this rises to 47% among the station’s core 16-24 year old demographic).

When asked about specific stations, nearly half of Radio 1 listeners (46%) thought that Radio 1 was the same or only slightly different to Capital FM. This widely held perception extended to the music played on the station. When asked to identify which station is most associated with the top 5 chart hit music tracks played on Capital FM, 60% of listeners attributed these tracks to Radio 1. In addition, on hearing the top 5 tracks played on Kiss, 58% attributed this music to Radio 1.
We also asked respondents to consider various artists and where they might expect to hear their music played. Nearly 80% attributed Rihanna to Radio 1. Three quarters thought that they would expect to hear a mainstream artist such as Katy Perry on Radio 1.

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

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

2.2 Content - Radio 2

Although BBC Radio was seen by just over half (54%) of Radio 2 listeners to be different to commercial radio, like commercial radio it was seen by 44% of listeners as a station simply designed to ‘appeal to the largest audience’. Only 19% stated the station was innovative. When listeners were asked what statements they thought applied to Radio 2, less than a fifth (19%) thought that it played music not available on other radio stations.

With regards to music, on hearing 5 of the top 10 tracks played on Smooth Radio, 65% said that they would most associate this music with Radio 2. Radio 2 was also highly associated with the top 5 tracks played on Magic (63%) and Heart (52%).
In addition to this, we asked respondents to consider various artists and where they might expect them to hear their music played. Nearly 80% attributed Queen to Radio 2 compared to the next highest Magic (39%). Just over three quarters stated that they would expect to hear Michael Buble on Radio 2.

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

The audience believes Radio 2 is over-delivering pop music content. For example, 35% of listeners would like Radio 2 to play less mainstream chart music and 46% want to hear fewer boy/girl band tracks.

In specialist music genres Radio 2 is under-delivering to the demands of the audience. Only 21% of listeners surveyed said they had heard specialist music shows on the station. Indeed, a significant proportion of listeners would like to hear more Blues (26%), Jazz (21%) and Soul (25%) on Radio 2. Country music particularly is perceived to be under represented; nearly a quarter would like to hear more country (this is highest among the over 65s where 40% would like to hear more) on Radio 2.
2.3 Service licence - Radio 1

Radio 1 is governed by a service licence that requires the station to provide listeners with a range of specific services, not otherwise offered by other radio stations. In the research project we asked whether specific elements of the service licence are associated with the station.

From our findings it is clear that Radio 1 is not associated with certain elements of its public service remit by its listeners. In general terms, only a third thought that BBC Radio informs and educates the public. More specifically, only 6% said that they believed ‘documentaries and social action should formed an integral part of the schedule’, 18% attributed ‘exposing me to new and sometimes challenging material I may not otherwise experience’ as part of the content and just a quarter said that they associated ‘programming for younger teenagers’ with Radio 1.

Radio 1 is also obliged to target listeners between 15-29 years of age, but 30% of 35-44 year olds think it is aimed at them.
75% or more of Radio 1 listeners suggest the station is not representing its target audience, or getting them to engage.

Which of the following do you associate with Radio 1?

- Music festivals: 62%
- Live music sessions: 57%
- Music from UK acts: 56%
- Supports emerging artists: 31%
- Nurturing UK talent: 29%
- Specialist music: 28%
- International music: 26%
- Accurate and impartial news: 26%

Which of the following do you associate with Radio 2?

- Enables me to explore a range of specialist music genres: 61%
- Arte programming: 51%
- Current affairs: 42%
- Music festivals: 31%
- New music: 27%
- Includes music from around the world: 25%
- Specialist music: 25%
- Reflects UK national regions and communities: 24%
- Includes music genres that do not normally receive wide exposure: 21%
- Extends my musical tastes: 21%

2.3 Service Licence - Radio 2

Radio 2 is governed by a service licence that requires the station to provide listeners with a range of specific services, not otherwise offered by other radio stations. In the research project, we asked
whether elements of the service licence are associated with the station.

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

Radio 2 is obliged to serve all age groups over 35, but 31% of 25-34 year olds think it is aimed at their age group. In addition, 65% of listeners aged 35-44 believe it is aimed at them.

3. Background

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

4. About BDRC Continental

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

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

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