Radio & Audio Review:

Ethnic minority audience perceptions and consumption of radio and alternatives

April 2021

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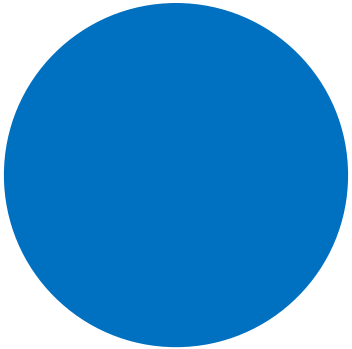
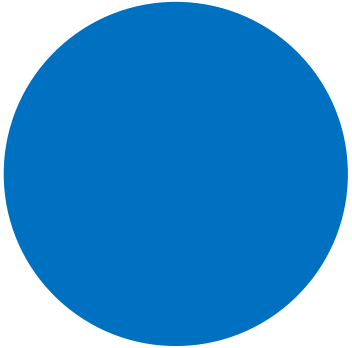
Key Questions & Methodology

Key Objective

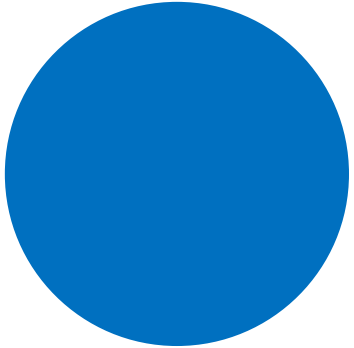
To understand how ethnic minority audiences perceive and consume radio, as well as other audio alternatives



Are needs being met for these audiences?



Do ethnic minority audiences have any different needs to White audiences?



Is there a difference between how the BBC serves these audiences compared to commercial radio?

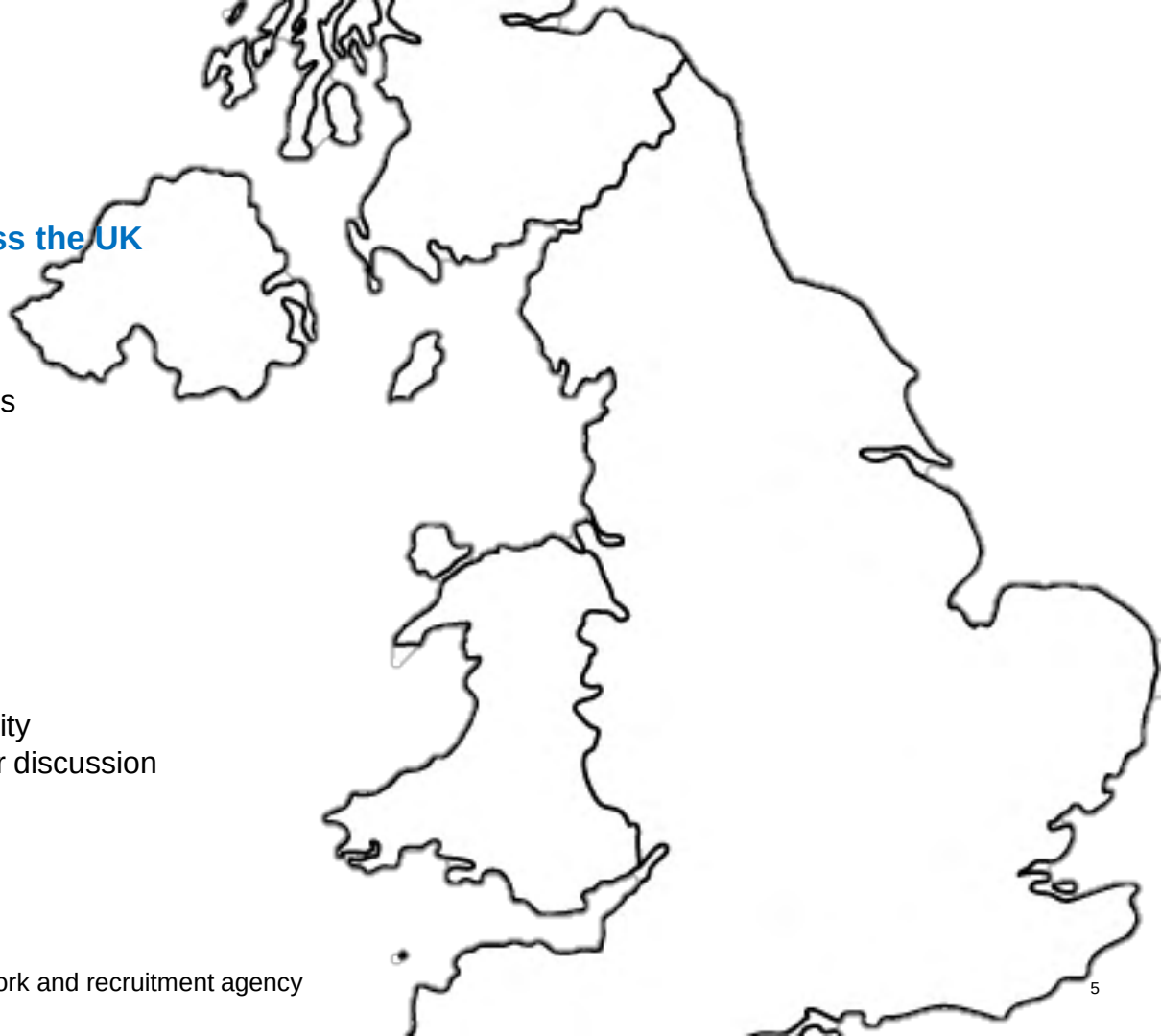
Location, Sample & Methodology

— Phase 1: 8x discussion groups across the UK

- Mainstream radio listeners
  - *16-34, 35-54, 55+*
- Community / pirate / other radio listeners
  - *16-34, 35-54, 55+*
- Other audio listeners (non-radio)
  - *2x mixed age groups*

— Phase 2: 10x 1-on-1 deeper dives

- Choosing most responsive ethnic minority respondents from each group for further discussion
- To explore in depth, in safer space



All recruited by *Ethnic Opinions* - a specialist fieldwork and recruitment agency

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Executive Summary

Executive Summary

KEY FINDINGS

- **Audiences across the board come to the radio category with a perception that it is a more passive medium:** A lean-back experience with associations of the past and regulated content
- **Many emotional drivers are especially enhanced for ethnic minority people:** Representation & Relatability, Connection & Discovery, Productivity & Motivation, Truth & Expertise
- **Functional needs are also changing, especially for younger and tech savvy audiences:** Specifically, around new controls that audiences have over what they listen to, the omnipresence of streaming and competition with streaming's UX and algorithms

RECOMMENDATIONS

- **Play on lower stakes of radio listening moment:** There are benefits and opportunities within this
- **Improve on execution of representation:** Greater need for relatable representation, on and off mic
- **Consider enhancing speech and news-based alternatives to what exists:** There is potential to shift the representation dial further with talk radio than music
- **Improve functional needs of radio apps:** A need to work hard to keep up functionally so there is lower barrier to access the content people desire
- **Keep promoting ways you have already made progress:** Many people are largely unaware of this or find it difficult to discover

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Category Perceptions & Listening Habits

Audiences across the board come to the radio category with a perception that it is a more passive, lean-back experience with associations of the past and regulated content

Music radio

Talk radio

Music streaming

Podcasts

YouTube

- Radio as a medium allows the listener to leave choice of both music or discussion to the station and presenter
- Associated with the past, nostalgia and previous generations
- Expectations of more planned, regulated and safe content (with the small exception of pirate radio)

- Streaming, mainly through Spotify, allows the listener to use this as background ambience but requires some level of the listener's own selection
- Associated with the present and future of audio listening
- Expectations of unpolished, uncensored and explicit content

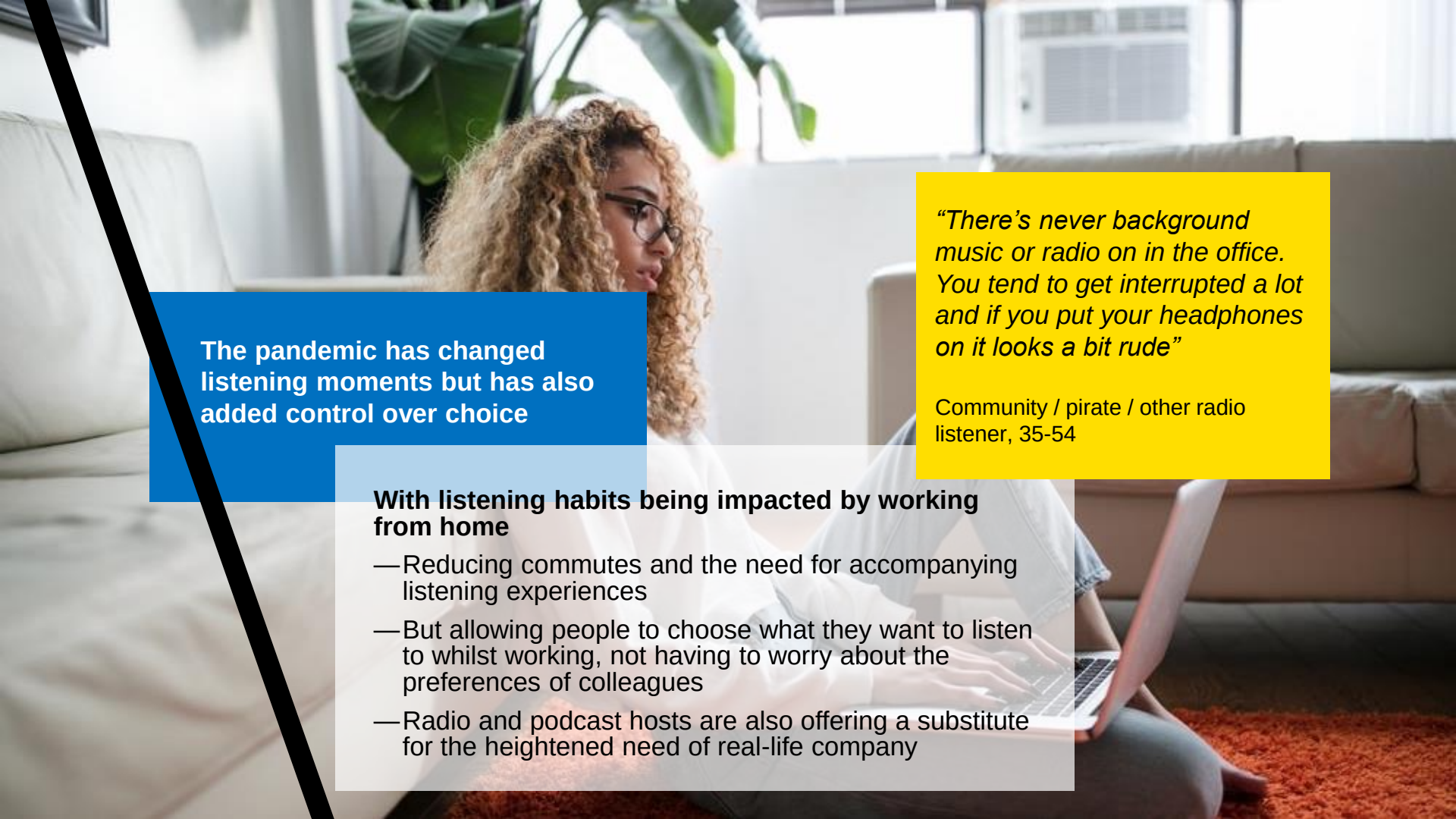
- Similar to podcast streaming in content but added attention needed for the visual element
- Associated with the present of long-form video content

Passive experience

Active experience

I listen to radio because unlike telly, I can do lots of other things at the same time. It's background noise while I'm in the house

Mainstream radio listener, 55+



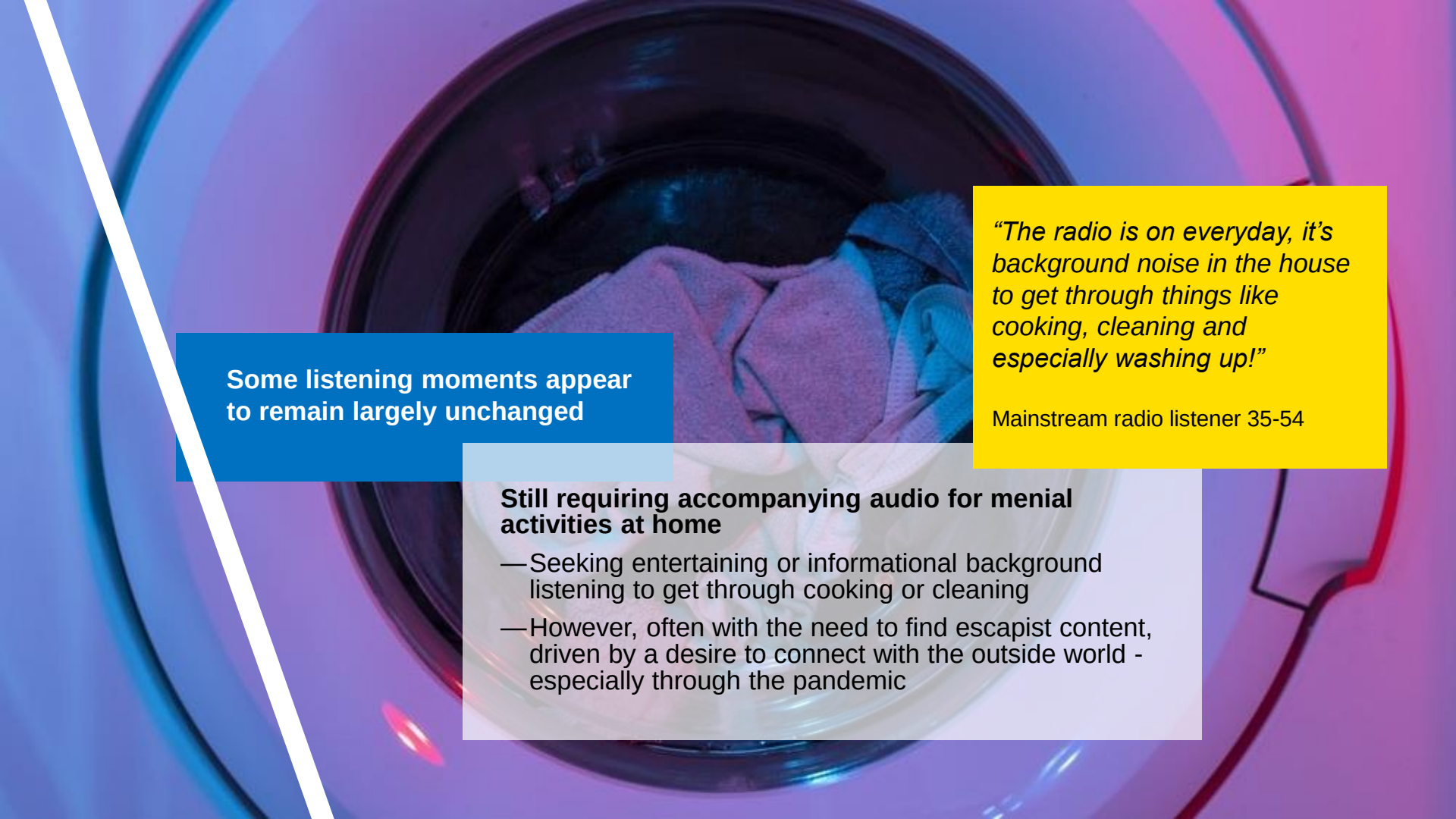
The pandemic has changed listening moments but has also added control over choice

“There’s never background music or radio on in the office. You tend to get interrupted a lot and if you put your headphones on it looks a bit rude”

Community / pirate / other radio listener, 35-54

With listening habits being impacted by working from home

- Reducing commutes and the need for accompanying listening experiences
- But allowing people to choose what they want to listen to whilst working, not having to worry about the preferences of colleagues
- Radio and podcast hosts are also offering a substitute for the heightened need of real-life company



Some listening moments appear to remain largely unchanged

“The radio is on everyday, it’s background noise in the house to get through things like cooking, cleaning and especially washing up!”

Mainstream radio listener 35-54

Still requiring accompanying audio for menial activities at home

- Seeking entertaining or informational background listening to get through cooking or cleaning
- However, often with the need to find escapist content, driven by a desire to connect with the outside world - especially through the pandemic

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Emotional Needs

Many emotional drivers are especially enhanced for ethnic minority audiences

Representation & Relatability

— To identify with others and see your image and thoughts reflected

Connection & Discovery

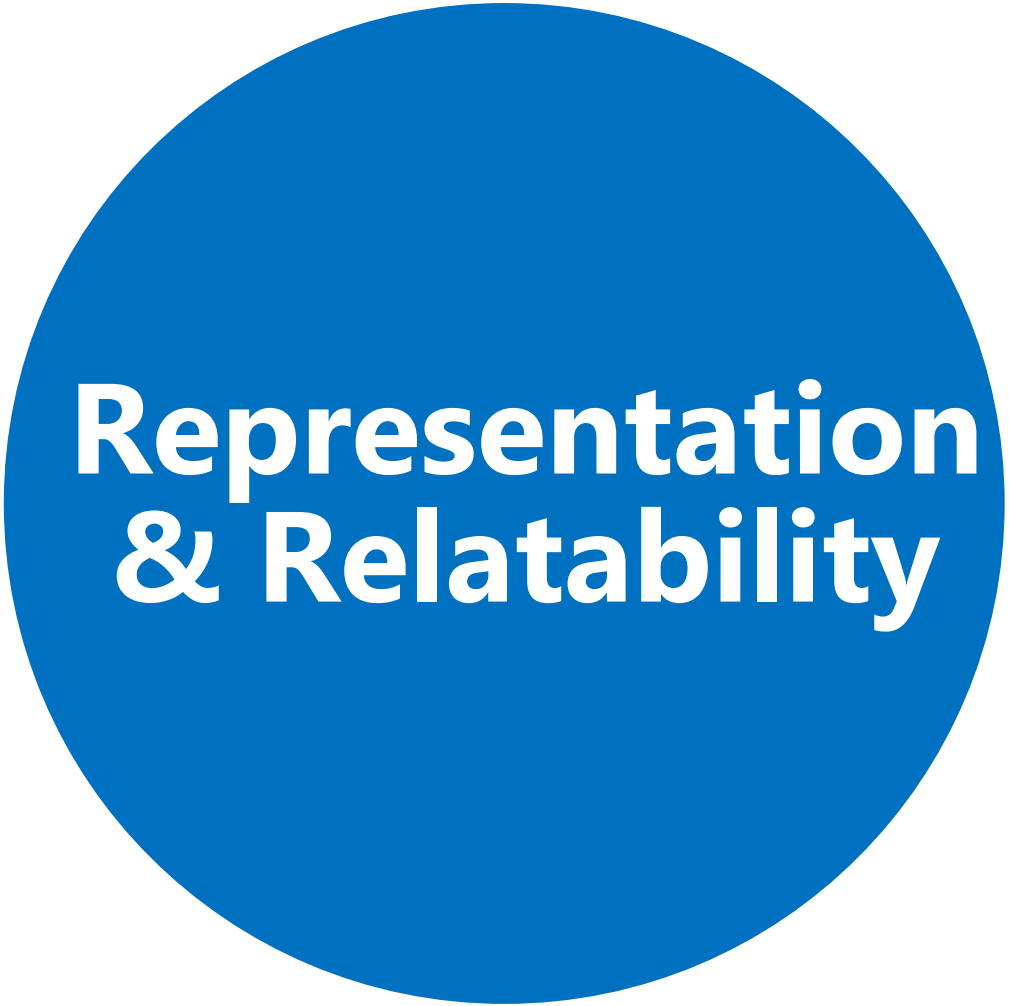
— To feel in touch with other people, places, arts and ideas

Productivity & Motivation

— To be inspired through others and become individually driven

Truth & Expertise

— To hear opinion with authority, especially when unheard in the mainstream


Representation
& Relatability

Radio is somewhat better for representation than in other public spheres but the opportunity to increase this could have a great impact on broader society

There is a feeling that overall, radio is doing somewhat better than many other public spheres

— For example, the increasing representation of Black music in the mainstream

— There is a feeling that some progress has been made and more accurate representation has been increasing, especially in recent years

Nonetheless, there is a strong sense that radio has much more progress to make on this

— Especially for younger audiences who have a different measurement of progress compared to their older counterparts

— The potential progress that can be made in mainstream radio is understood to have the power to go beyond this sphere too with radio presenters now appearing in many other spaces (TV, literature, politics, arts)

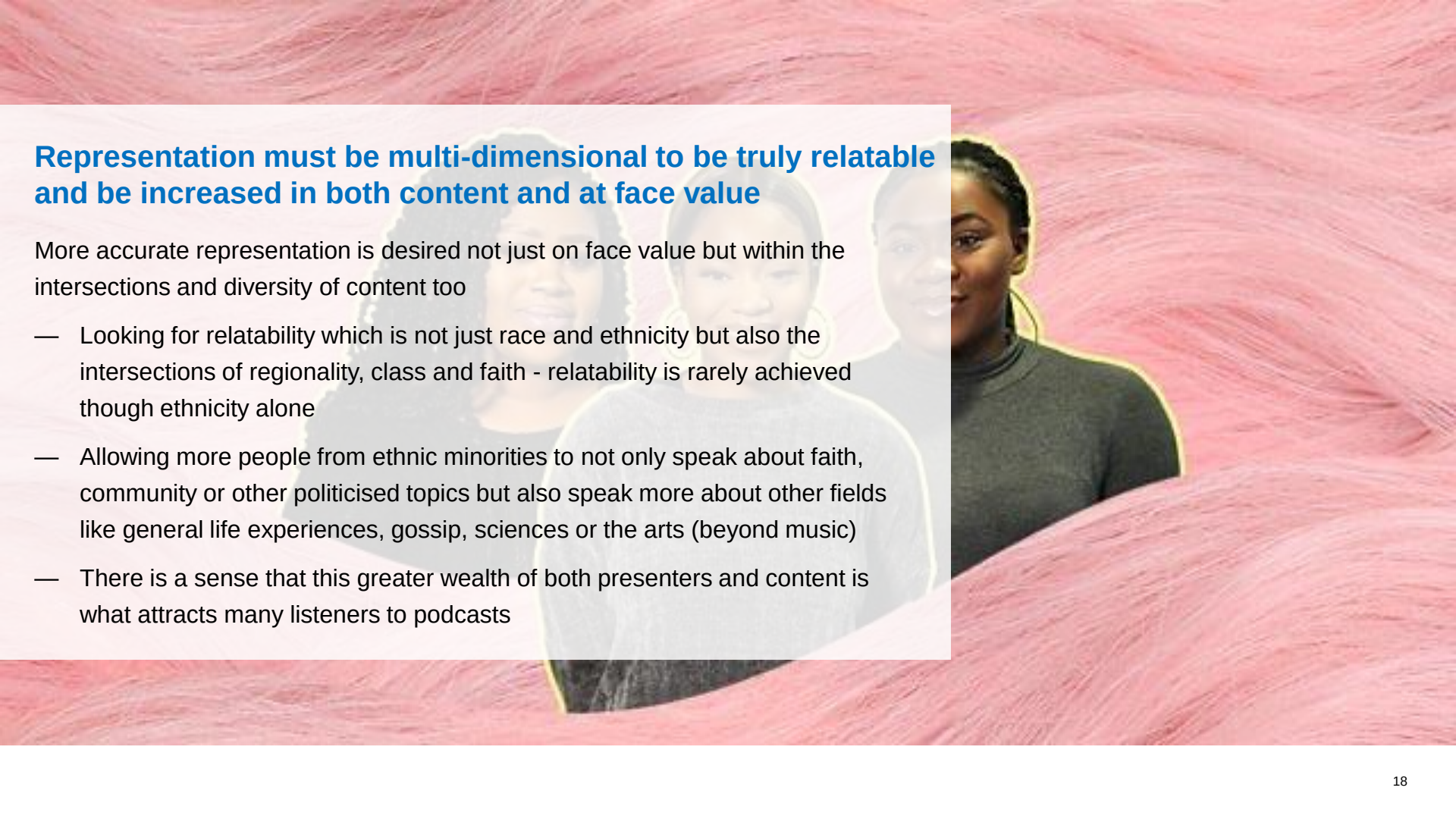
It shouldn't even be called inclusion; it should be natural. If you do have in your area a certain proportion of this and a certain proportion of that, then it should just be standard (to have reflective representation)

Community / pirate / other radio listener, 35-54

Representation must be multi-dimensional to be truly relatable and be increased in both content and at face value

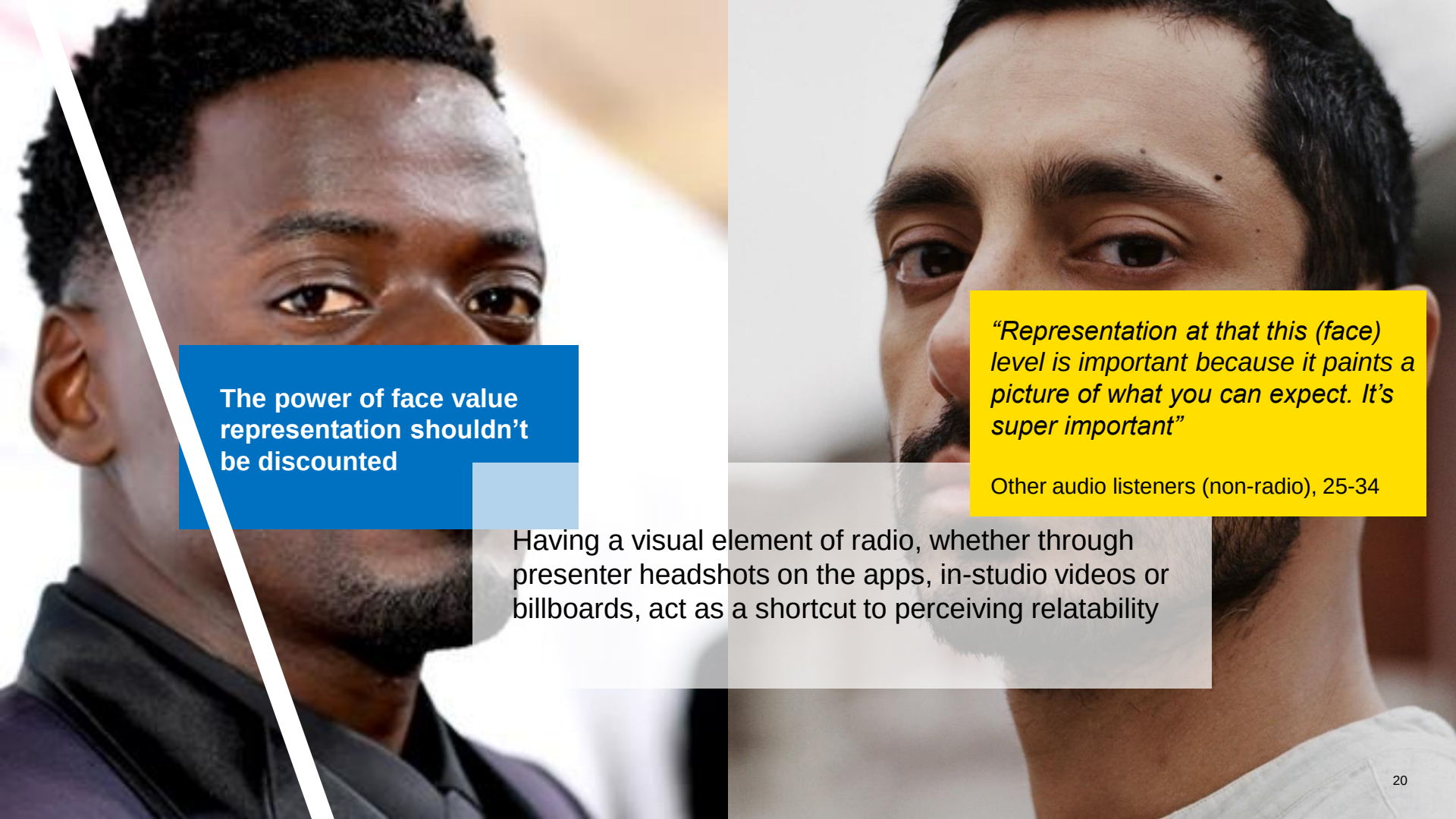
More accurate representation is desired not just on face value but within the intersections and diversity of content too

- Looking for relatability which is not just race and ethnicity but also the intersections of regionality, class and faith - relatability is rarely achieved though ethnicity alone
- Allowing more people from ethnic minorities to not only speak about faith, community or other politicised topics but also speak more about other fields like general life experiences, gossip, sciences or the arts (beyond music)
- There is a sense that this greater wealth of both presenters and content is what attracts many listeners to podcasts



With like BBC 1Xtra, the music that they play (Black music) is from that audience but I'm not sure if the people that actually tune in are that audience (Black listeners)

Community / pirate / other radio listener, 35-54



The power of face value representation shouldn't be discounted

"Representation at that this (face) level is important because it paints a picture of what you can expect. It's super important"

Other audio listeners (non-radio), 25-34

Having a visual element of radio, whether through presenter headshots on the apps, in-studio videos or billboards, act as a shortcut to perceiving relatability

As the BBC is a public service broadcaster, there are higher expectation for it to have better representation in all forms

“I think it (representation) has definitely got better, you see them doing it on TV as well”

Other audio listeners (non-radio)

As reflected on BBC TV channels - compared to commercial radio stations that are not held to the same standard

Specialist platforms are still important but need inclusion at a sub-demographic level too

Whilst there is a great importance to improve representation in the mainstream, there is still a need for specialist and shows

— With an understanding that these spaces, whether on specialist platforms like BBC 1Xtra, BBC Asian Network or Capital XTRA, on community stations or independent podcasts - these are safe spaces

— An understanding that you're never going to tick everyone's boxes and mainstream Britain may not be interested in hearing what is relatively niche interest

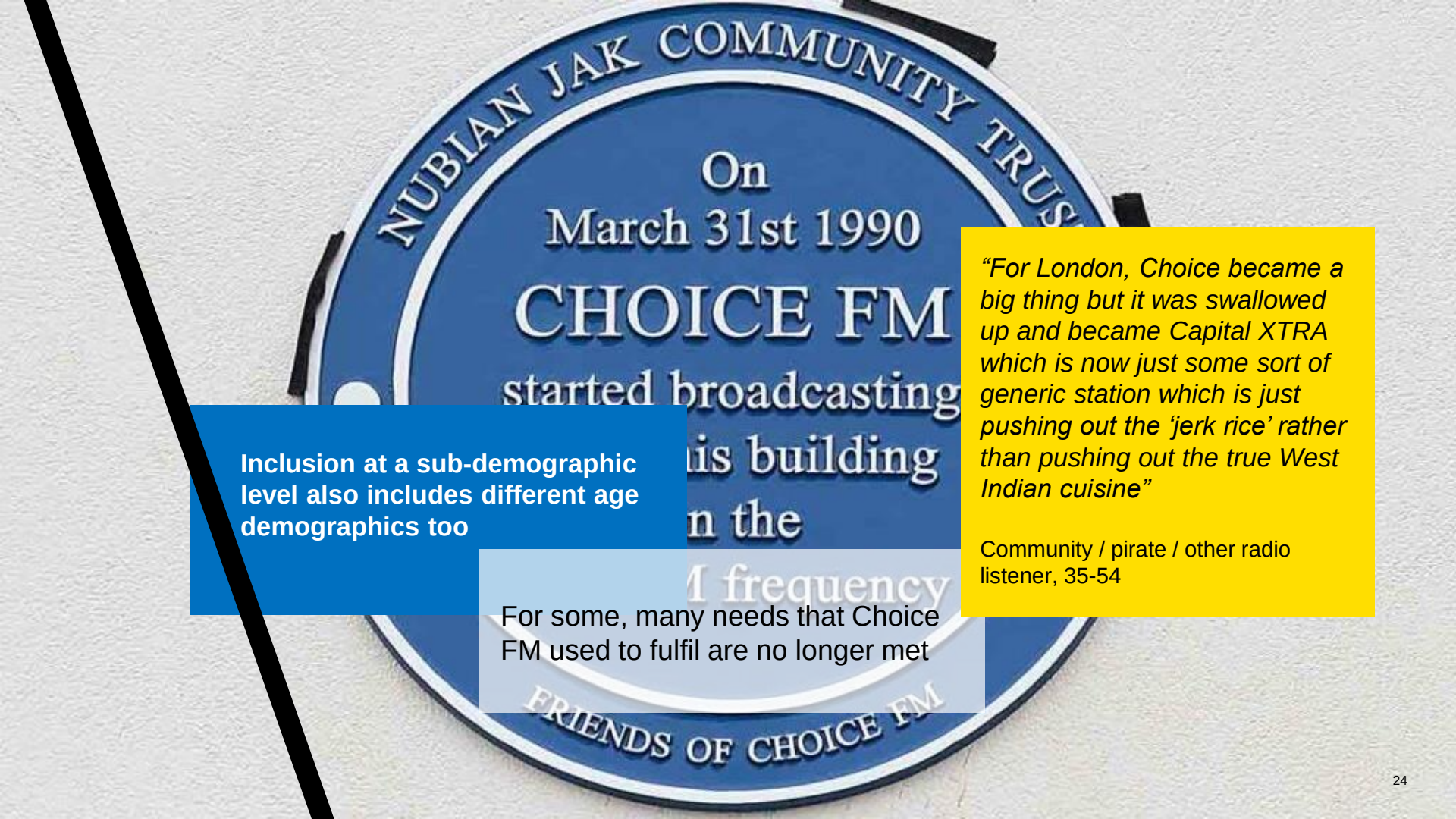
However, those specialist platforms would be more inclusive if they had inclusion at a sub-demographic level too

— Representing a broader range of sub-groups and not being afraid to spotlight them

— As opposed to mostly talking about the broader collective in aggregate

I’m a Black Arab, I don’t necessarily fit into the stereotype of what Black culture may be and I don’t listen to like Caribbean music so when they say they cater to Black people, there’s a lack of diversity even in that

Community / pirate / other radio listener, 35-54

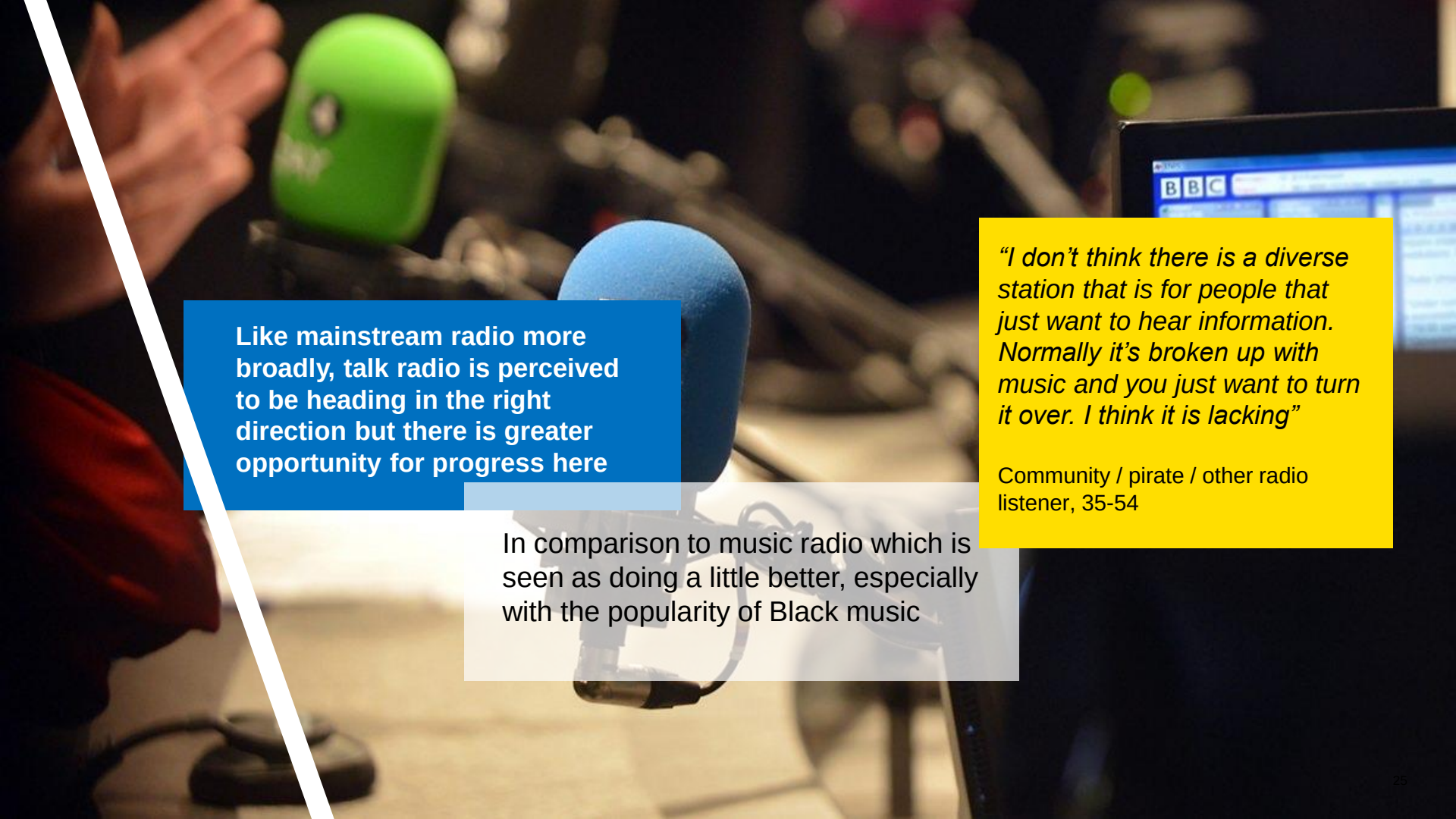


Inclusion at a sub-demographic level also includes different age demographics too

For some, many needs that Choice FM used to fulfil are no longer met

"For London, Choice became a big thing but it was swallowed up and became Capital XTRA which is now just some sort of generic station which is just pushing out the 'jerk rice' rather than pushing out the true West Indian cuisine"

Community / pirate / other radio listener, 35-54



Like mainstream radio more broadly, talk radio is perceived to be heading in the right direction but there is greater opportunity for progress here

In comparison to music radio which is seen as doing a little better, especially with the popularity of Black music

“I don’t think there is a diverse station that is for people that just want to hear information. Normally it’s broken up with music and you just want to turn it over. I think it is lacking”

Community / pirate / other radio listener, 35-54

When thinking about talk radio, LBC has the most prominence but much progress to make on multi-dimensional representation

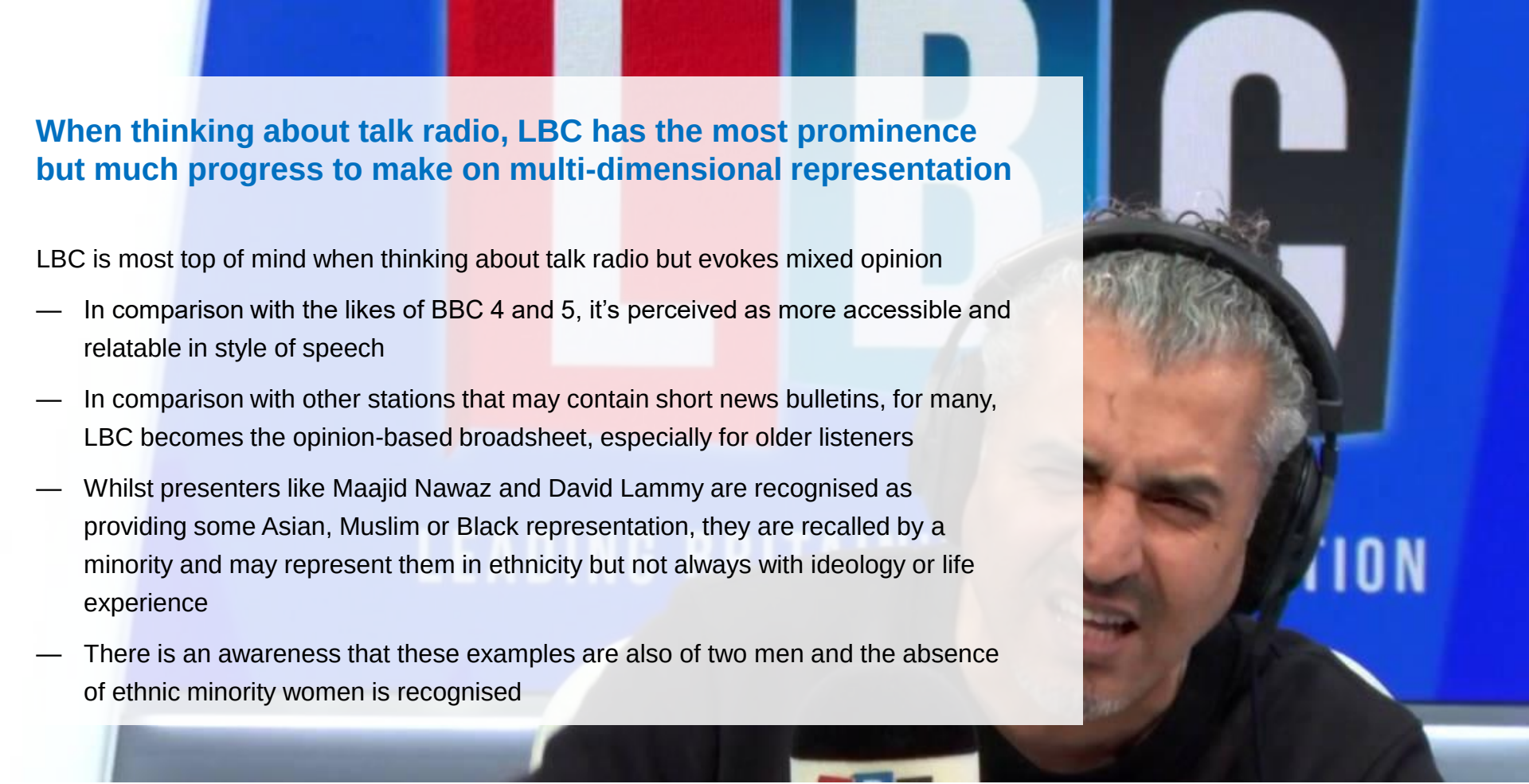
LBC is most top of mind when thinking about talk radio but evokes mixed opinion

— In comparison with the likes of BBC 4 and 5, it's perceived as more accessible and relatable in style of speech

— In comparison with other stations that may contain short news bulletins, for many, LBC becomes the opinion-based broadsheet, especially for older listeners

— Whilst presenters like Maajid Nawaz and David Lammy are recognised as providing some Asian, Muslim or Black representation, they are recalled by a minority and may represent them in ethnicity but not always with ideology or life experience

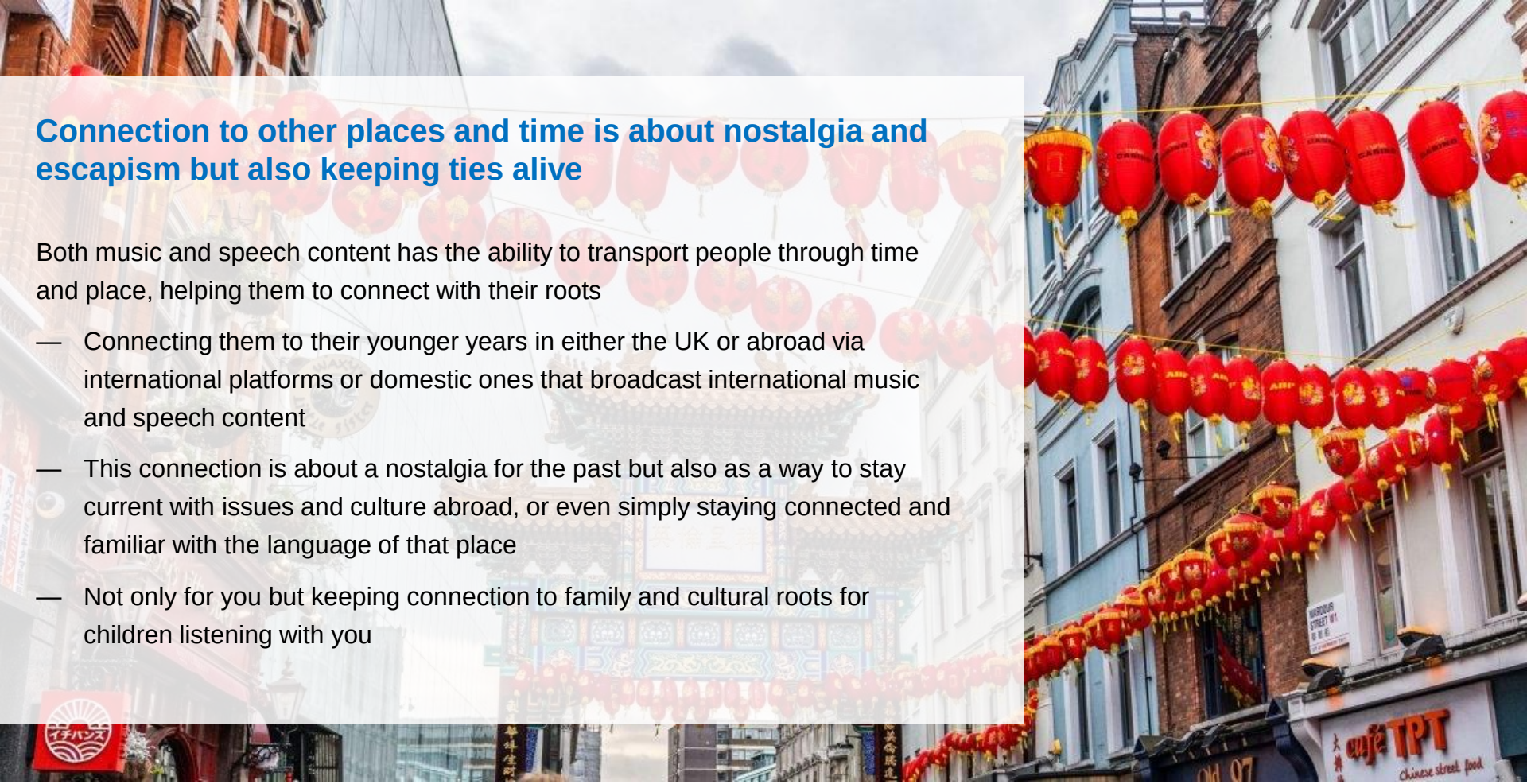
— There is an awareness that these examples are also of two men and the absence of ethnic minority women is recognised



I can’t think of any radio station that gives you diversity of thought and opinion. It’s really the podcasts and some community stations that give you diversity of thought because it impacts them locally and individually. That’s actually really sad isn’t it

Community / pirate / other radio listener, 35-54

Connection &
Discovery



Connection to other places and time is about nostalgia and escapism but also keeping ties alive

Both music and speech content has the ability to transport people through time and place, helping them to connect with their roots

- Connecting them to their younger years in either the UK or abroad via international platforms or domestic ones that broadcast international music and speech content
- This connection is about a nostalgia for the past but also as a way to stay current with issues and culture abroad, or even simply staying connected and familiar with the language of that place
- Not only for you but keeping connection to family and cultural roots for children listening with you

I really love listening to Lyca Radio because it reminds me of when my Dad used to listen to it when it was ‘Sunrise Radio’. I want to pass it on to my grandchildren as well

Community / pirate / other radio listener, 55+

Desire for connection with like-minded people and music fans; creating new discourse and discovering new music together

New discourse together

— The liveness of radio helps to deliver this feeling of real-time, authentic connection

— Conversely, some listeners find this live element within podcasts, gaining this feeling from the unpolished, ‘as-live’ style

— Live calling is yet to be fully replaced, however, Clubhouse and the ‘live podcasting’ space that is being developed is starting to fill this gap for younger listeners

New music discovery together

— Feeling connection to the live radio DJ that is premiering new music as well as the other listeners that are tuning in, even tweeting in at the same time

— For the very cutting edge, online stations like NTS or No Signal may do a better job at this but a platform like BBC Radio Introducing isn’t too far behind

— However, new premieres of music are increasingly happening off radio, especially on YouTube

I know this is really stupid but there was a time where I didn’t even know that podcasts were all pre-recorded and edited! I kind of thought that it was just like radio and live

Other audio listeners (non-radio), 25-34

Productivity &
Motivation

Using audio to enhance productivity

For many, especially younger demographics, self-improvement podcasts provide an answer to the need for productivity

— An expectation for the contents of a show to be very clear (through podcast or YouTube titling) – with little time to gamble figuring this out

— As opposed to the more lean-back and longer-form experience of radio

— This is tied to ideas of young Millennial and Gen Z productivity

In the morning, where I used to listen to affirmations before, I now listen to more podcasts that recite these kinds of things while I drive into work

Community / pirate / other radio listener, 35-54

Seeking self-improvement content to motivate yourself

A large part of this self-improvement need is met through motivational and inspirational life stories

— Found within life stories and lessons relatable people

— Often these stories have links with faith and spirituality

— Commonly listened to in the morning to feel energised in the same way many people will listen to energetic music

Motivational stories can also be found beyond large celebrities and within presenting talent themselves

— Seeing their come up through the media world via socials (e.g. Kamilla Rose, Mim Shaikh, Reece Parkinson)

— Links with the drive for meritocracy, showing you that anyone can become a respected public figure

On Denzel Washington’s podcast he talks about things like being determined, having perspective and success. He talks about challenges and stepping out of your comfort zone

Other audio listeners (non-radio), 25-34

Truth &
Expertise

There is appetite and opportunity for news-based alternatives that truly reflect the experiences and views of many ethnic minority people

Perception of biased news

— A desire for expert and authority opinion to cut through noise

— But challenging to find in mainstream which is seen as biased and antagonistic

Trickle down to public

— That biased and right-leaning opinion appears to trickle down to the public

— Commonly reflected in the ideology of guests and callers too

Desire for an alternative

— Seeking the same energetic content but with relatable people, ideas and niche discussion

— Currently found in more niche spaces on podcasts and YouTube

An energetic alternative

— The true alternative mirror to the likes of LBC isn't the academic type (e.g. Mishal Husain on BBC Radio 4)

— But instead the likes of Trevor Noah, Andrew Shultz, Nish Kumar, Angela Yee, Mobeen

There are no stations that dispel the misconceptions (about people like me –Asian, Muslim) and have presenters that are down to earth and funny but are also very knowledgeable

Other audio listeners (non-radio), 25-34

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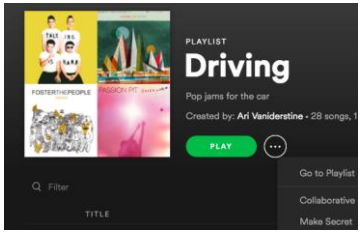
Functional Needs

A need to work hard to keep up functionally so there is lower barrier to access the content people desire



Control over compromise

— No longer having to listen to a mix of music and speech when you only desire one at a time

— No longer searching for perfect presenter that can give you both the music you want and speech you enjoy

Omnipresence of streaming

— Being able to move an app like Spotify seamlessly through places and devices makes it feel omnipresent

— Contrasting with the perception that you have to go out of your way to listen to radio

Functionality of apps

— Apps like BBC Sounds and Global Player are becoming more sophisticated

— However, the intuitive UX of an app like Spotify gives easier listening access (e.g. easier to judge duration)

Competing with algorithm

— A sense that Spotify and YouTube are proactively getting to know your tastes very well, even if this is via an algorithm

— The radio DJ now needs to work harder to compete against this

YouTube is just so easy to access, you can just put something on and tune in whenever. I'm sure you can do the same with radio or digital radio but I've just never done it before

I don't know what the channels are, how diverse they are, what the discussions are about and if it's things that would relate to me or not

Other audio listeners (non-radio), 25-34

It’s like YouTube knows the colour of my skin!

Mainstream radio listener, 16-34

6

Strategic Recommendations

5 Strategic Recommendations to work toward meeting the needs of ethnic minority radio audiences

1. Play on lower stakes of radio listening moment
2. Improve on execution of representation
3. Consider enhancing speech and news-based alternatives to what exists
4. Improve functional needs of radio apps
5. Keep promoting ways you have already made progress

1

Play on lower stakes of radio listening moment

“The radio is on everyday, it’s background noise in the house to get through things like cooking, cleaning and especially washing up!”

Mainstream radio listener 35-54

- Whilst radio is commonly perceived as the more lean-back, passive listening experience, there are benefits and opportunities within this
- There are moments where not having to go through the effort of finding something specific to listen to is desired
- Being able to switch live radio on and off without having to worry about matching listening duration to activity (e.g. cooking) or gaining a sense of completion (i.e. from hearing the whole podcast)
- **Radio can be the casual friend that you enjoy spending time with rather than the one you always have to acutely plan ahead to meet up with**

2

Improve on execution of representation

"I think representation from the top is really important. It's not just about showing people we have diversity, it's about having it behind the scenes and in higher positions as well. It will definitely have an impact on what's broadcasted and said on the channels. It can only be positive"

Other audio listeners (non-radio), 25-34

- Greater need for relatable representation in the mainstream, on the mic and in the boardroom
- Going beyond face value race to find intersections with region, class, faith, age, and sexuality
- Ensuring ethnic minorities are part of the conversation beyond faith, community and politics
- Nevertheless, you're not going to tick everyone's boxes all the time so there's still a need to create great specialist platforms that can act as safe spaces for discussion and more niche music genres

3

Consider enhancing speech and news-based alternatives to what exists

There are no stations that dispel the misconceptions (about people like her –Asian, Muslim) and have presenters that are down to earth and funny but are also very knowledgeable

Other audio listeners (non-radio), 25-34

- Popular talk radio content like LBC is far-reaching, especially when it appears on social media - becoming part of a broader debate (rather than trying to host the entire debate)
- However, there is potential to shift the representation dial further with talk radio than there is with music radio (which feels relatively more representative)
- There is opportunity and strong appetite, especially from but not limited to ethnic minority audiences – to enhance alternatives to LBC (which feels right-leaning) or BBC Radio 4 and 5, which can feel stuffy and academic

4

Improve functional needs of radio apps

"YouTube is just so easy to access, you can just put something on and tune in whenever. I'm sure you can do the same with radio or digital radio but I've just never done it before. I don't know what the channels are, how diverse they are, what the discussions are about and if it's things that would relate to me or not"

Other audio listeners (non-radio), 25-34

- Whilst alternative listening mediums like Spotify may have more resource to continuously invest in app UX
- Apps like BBC Sounds and Global Player need to work hard to keep up functionally so there is less barrier to access the content people desire
- To prove their value against a mobile's app storage capacity
- The alternative is to migrate more on-demand content to the likes of Spotify

5

Keep promoting ways you have already made progress

"Representation at that this (face) level is important because it paints a picture of what you can expect. It's super important"

Other audio listeners (non-radio), 25-34

- Many of the needs and desires expressed by people in this study do somewhat exist on mainstream radio, even if seemingly niche e.g. programming from the likes of Grace Adeniji on spirituality and inspiration does exist on the BBC
- Despite this, there is a distinct perception that representation of ethnic minority presence and experiences are largely absent – whether because this is true, because people are unaware or because this is difficult to discover (compared to podcasts and YouTube)
- So whilst efforts are made to increase this, continue to promote the efforts you are already making, e.g. LBC billboards of David Lammy – face value representation is still highly impactful

THANK YOU

Tarek Chaudhury

Senior Strategist & Qual Researcher

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of the Year