

BBC Charter Review of Analogue Radio Seminar Papers - Audience Pack

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1. All BBC Radio - Network Analysis

Key Facts

(Unless stated otherwise all data quoted is from the BBC Radio overview paper and where appropriate page references are given.)

Audience Data:

- BBC Radio has 32.4 million listeners each week, which is an overall share of 52.6% (Q1, 2004). (Audience data pack, Overview, p11)
- Its reach was 66.9% during Q1 of 2004. (Audience data pack, Overview, p12)
- BBC Radio services score an average approval rating of 8.0 out of 10, compared to the average of 6.1.
- Each listener on average listens to BBC Radio around 17.39 hours per week. (Audience data pack, Overview, p14)
- 90% of the population listen to radio each week, using BBC services for over 17 hours. (p4)
- The BBC performs less well in reach amongst ethnic minorities, particularly in London where reach is around 36% compared to 62% amongst Whites Adults.

Figure 1 Overview of BBC Audience Data

	Weekly Reach (m)	Weekly Share (%)	Average Age	Average Approval Rating	Average Listening Hours (per week)
Radio 1	9.76	7.6%	28	7.2	8.5
Radio 2	12.92	15.3%	50	7.9	13
Radio 3	2.16	1.2%	57	7.5	5.54
Radio 4	9.56	11%	54	8.3	12.48
Radio Five Live	6.06	5.1%	46	7.8	8.3
Nations & Local Radio	10.21	11%	55	7.8	11.22
BBC Radio	32	52.6%	48	8	17.39

Cost:

- The total cost of BBC Radio services in 2003/04 was £466 million.
- The cost per hour was £1,524 and the cost per listener per hour was £0.02.
- The costs per hour for the individual networks in 2003/04 are shown in figure 2.

Figure 2 Comparison of cost per head and cost per listener per hour (£)

		1999/00	2000/01	2001/02	2002/03	2003/04
Radio 1	cost per hour	4,285.43	4,433.48	4221.68	4,363.33	4,292.35
	cost/listener hour	0.01	0.01	0.01	0.01	0.01
Radio 2	cost per hour	4,522.65	4,370.55	4,729.11	4,770.66	4,719.07
	cost/listener hour	0.01	0.01	0.01	0.01	0.01
Radio 3	cost per hour	6,014.23	5,751.83	5,912.44	5,992.01	6,093.81
	cost/listener hour	0.08	0.08	0.08	0.08	0.08
Radio 4	cost per hour	10,502.00	11,010.67	11,185.83	11,063.27	11,044.71
	cost/listener hour	0.01	0.01	0.01	0.01	0.01
Radio Five Live	cost per hour	6,703.21	7,574.54	8,390.75	8,657.65	8,237.70
	cost/listener hour	0.03	0.03	0.03	0.03	0.03
Nations & Local	cost per hour	582.18	609.87	607.49	659.53	656.11
	cost/listener hour	0.03	0.02	0.02	0.03	0.03
Total	cost per hour	1,445.59	1,489.99	1,524.99	1,559.72	1,524.56
	cost/listener hour	0.02	0.02	0.02	0.02	0.02

BBC Radio Output:

Music and Speech:

- On average 50% of songs played weekly on Radio 1 are by UK artists. (p11)
- Two-thirds of songs on Radio 2 (from 20 different music genres) are not played on other UK stations. (p11)
- Radio 3 commissioned 50 new classical works in the last year. (p11)
- Radio 4 commissioned 350 new plays and 300 hours of original comedy last year.
- Radio Five Live broadcast 6,486 hours of news and weather during 2003/04.

News:

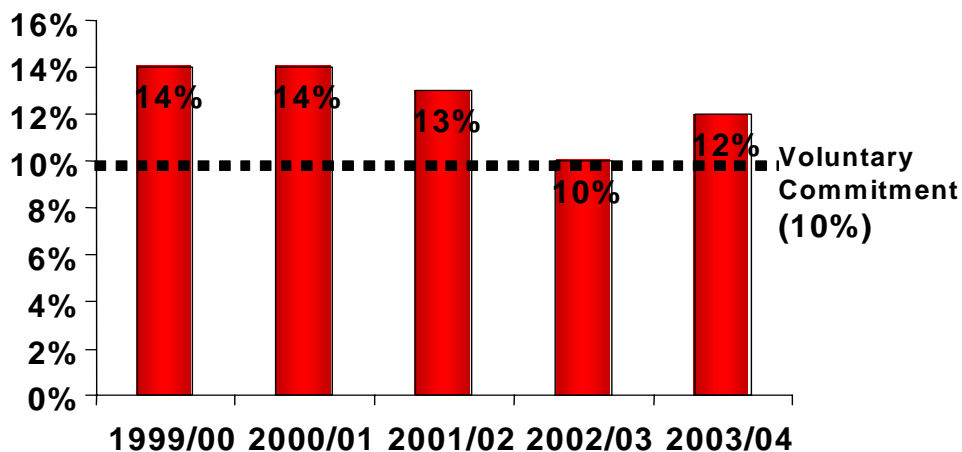
- The five national stations produce over 11,000 hours of news and current affairs a year. (p8)

- There are 140 BBC network journalists and around 300 to 500 reporters for Nations and Regions. (p9)

Economic Value:

- Over 50% of direct programming (staff, talent, resources etc), or over £211 million, is spent outside London. (p23)
- BBC Radio issues around 3,700 contracts to writers and 11,000 to actors in a year. (p23)
- Over 420 musicians and singers within the BBC performing group are directly employed.
- In 2003/04 BBC Radio worked with 67 different independent production companies, at an investment of around £12 million. (p26) Year on year independent production displayed in figure 3.

Figure 3 Independent Production since 99/00



Website:

- 4.1 million unique users to the BBC Radio websites during 2003/04.
- In March 2004, BBC Radio sites recorded over 90 million page impressions.

Value of BBC Radio:

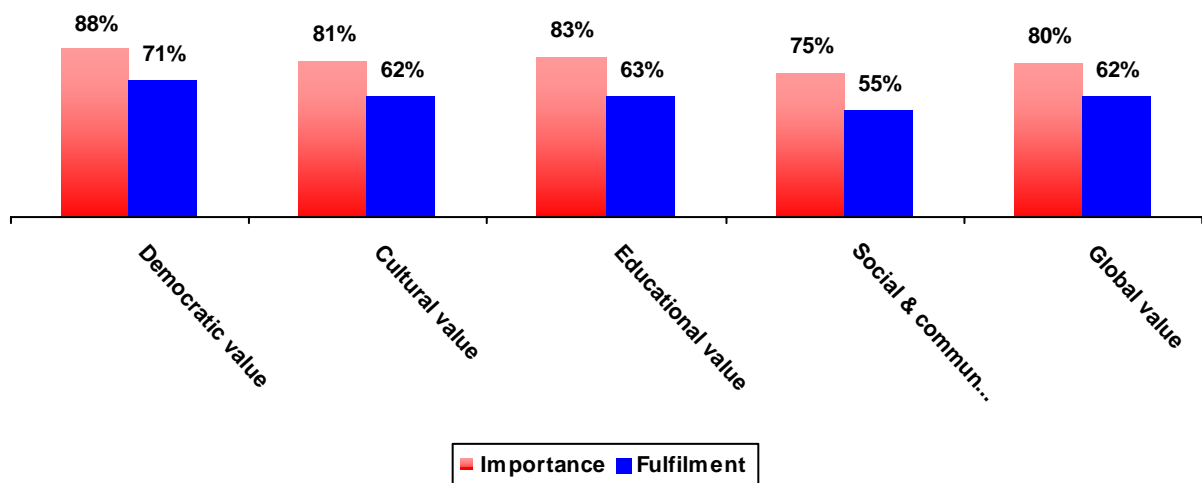
(All statistics in this section are quoted from the BBC Quest surveys “Attitudes to BBC and commercial Radio” and “Attitudes to BBC Radio and public value”.)

- *How much would listeners miss their station?* Those answering “Miss a little or Miss a lot”:
- | | |
|----------------------|-----|
| ○ Radio 1 | 74% |
| ○ Radio 2 | 93% |
| ○ Radio 3 | 96% |
| ○ Radio 4 | 96% |
| ○ Radio Five Live | 86% |
| ○ BBC National/Local | 90% |

- *How important are the stations they listen to in their everyday lives? Those answering "Quite important or very important":*
 - Radio 1 59%
 - Radio 2 79%
 - Radio 3 91%
 - Radio 4 93%
 - Radio Five Live 84%
 - BBC National/Local 85%
- *If your station closed tomorrow, is there a similar station that you would listen to that has similar types of music/programmes? Those that could think of at least one alternative station.*
 - Radio 1 28%
 - Radio 2 23%
 - Radio 3 32%
 - Radio 4 14%
 - Radio Five Live 22%
 - BBC National/Local not available
- *How important is the continued licence fee funding for BBC Radio? Those which answered quite important and very important: (Audience data pack, overview, p38)*
 - Total 65%
- *Is it important for the UK to have public service radio? Those answering very important and quite important: (Audience data pack, overview, p33)*
 - Total 85%
- *To what extent do you think it is important that the BBC is responsible for each public value and how well does BBC Radio fulfil them? Figure 4 (p59)*

Figure 4 *

Importance and fulfilment of public values



* See 'Definitions of Terms' for descriptions of BBC public values.

2. Summary of 'Building Public Value'

- We (the BBC) will secure the BBC's commitment to our collective cultural heritage by maintaining investment in music-making, arts and documentary coverage on Radios 1, 2 and 3. (p13)
- A new public interest test will delineate the scope and objectives of BBC services more explicitly than in the past, the system will all make the BBC's current and future services more predictable from the perspective of other players in the media market. (p15)
- Every BBC channel and service will be granted a Service Licence by the Board of Governors, setting out its remit, conditions and objectives. Significant variations to the licence would require agreement from the board. (p15)
- A new performance measurement framework will be adopted, based around four overall criteria: reach, quality, impact and value for money. The framework will consider public value delivered against each of the BBC's five principal public purposes. Reach – the proportion of people who use the BBC's services – will be a headline indicator of success. Audience share and volume will continue to be considered as measures of programme or service impact, but only as two among several. (p15)
- We will increase support for the roll-out and take-up of digital radio. We will invest in the BBC's DAB network to ensure that at least 90% of UK homes can receive BBC radio services on DAB, in partnership with commercial radio through the Digital Radio Development Bureau. (p62)
- All local radio services on digital. We will seek to offer all our existing and new local radio services on digital platforms to ensure they reach the widest possible audience. (p77)
- Extended local radio coverage. New technology and lightweight equipment will also allow us to extend services and develop new ways to connect with local audiences. In radio, this will mean increasing local coverage to traditionally underserved parts of the UK, like Bradford, Somerset, Cheshire and Dorset. (p77)
- In radio, the BBC is the only broadcaster in Europe to commission a significant amount of output from independents. Within the UK the BBC has had a voluntary commitment in place since 1996 to commission at least 10% of its network programming from independent producers. It has consistently exceeded that target and currently commissions around 13% externally. There are ongoing discussions between BBC radio and the independent production sector with a view to developing the relationship with the sector still further. The commercial sector commissions virtually no programming from the independent sector. (p101)
- In radio, the BBC is committed to continue to exceed the current voluntary target of 10% of network radio production from the independent sector, and, as part of the review, will agree and then publish a voluntary quota for the nations' radio services. (p17)

3. “The Communications Market 2004” – Ofcom – 11 August 2004

Key Facts - Analogue Radio

- By the end of July 2004, there were 212 local FM commercial radio stations broadcasting, together with 59 local AM licences, one national FM commercial station. (p17)
- In many areas of the country the FM spectrum is now full, however Ofcom expect to issue at least 30 new FM licences in the next three years. (p15)
- Annual radio revenue in the UK is above £1.1 billion, £543 million from commercial radio. (p9)
- There has been an overall upward trend in total listening, in the last five years (Q2 1999 to Q2 2004) by 7%. Most people listen to radio every day, with the highest audiences coming in the morning. (p64)
- The BBC reaches 66% of listeners compared to commercial stations 64%. Figure 5 (p69)
- The BBC networks has the largest audience share with 42.2%, local commercial radio at 34.9%, BBC Nat/Loc Radio 10.9%, and national commercial 10.1% (Q2, 2004). Figure 6 (p78)

Figure 5 Audience reach

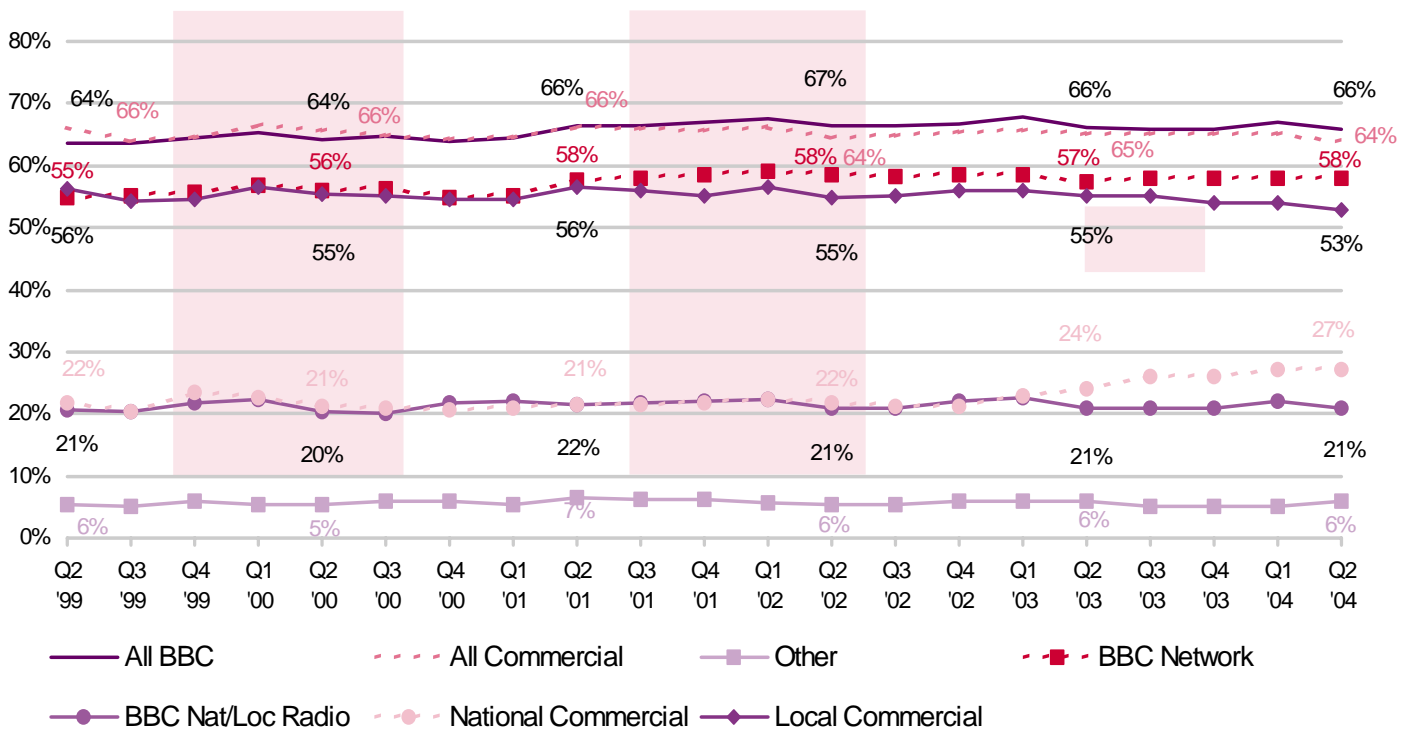
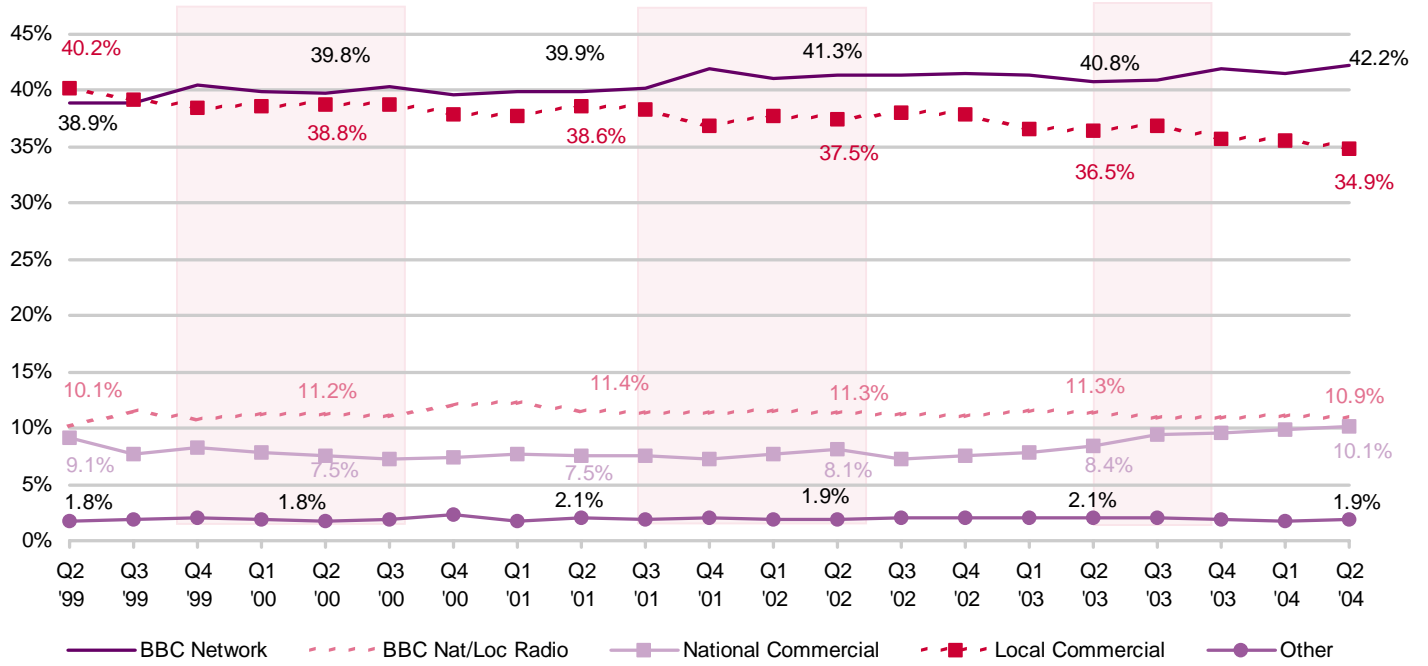


Figure 6 Audience Share



4. DCMS Research

(Quoted from Mori poll "Quantitative Research to inform preparation of the BBC Charter Review 2004".)

- *Q Which of these types of programmes, if any, do you personally listen to nowadays?*

<input type="radio"/> Music – pop/rock	49%
<input type="radio"/> Music - other	33%
<input type="radio"/> News about the UK and the world	33%
<input type="radio"/> Music – classical	25%
<input type="radio"/> Phone-ins and discussion shows	18%
<input type="radio"/> Sports programmes	16%
<input type="radio"/> Music – jazz	13%
<input type="radio"/> Comedy	12%
<input type="radio"/> Drama	11%
<input type="radio"/> Documentaries	11%
<input type="radio"/> Information about my region	11%
<input type="radio"/> Arts, and culture programmes	10%

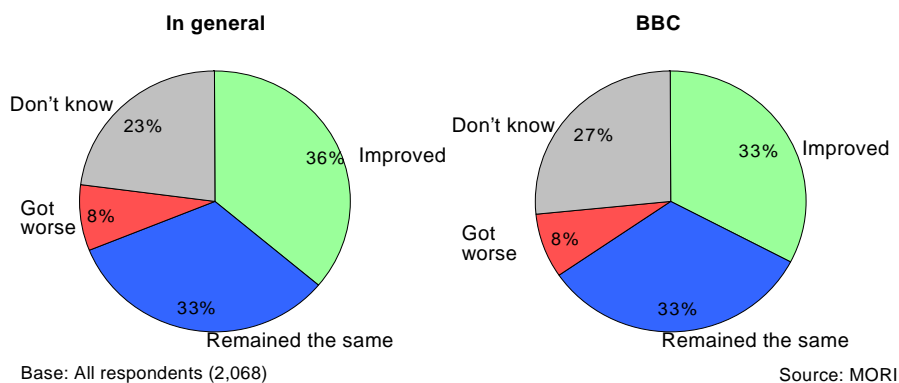
- *Q Which types of programmes, if any, would you like to hear more of?*

<input type="radio"/> Comedy	11%
<input type="radio"/> Music – pop/rock	8%
<input type="radio"/> Music - other	8%
<input type="radio"/> Drama	7%
<input type="radio"/> Documentaries	7%
<input type="radio"/> Music – classical	5%
<input type="radio"/> News about the UK and the world	5%
<input type="radio"/> Phone-ins and discussion shows	5%
<input type="radio"/> Music – jazz	4%
<input type="radio"/> Arts, and culture programmes	3%
<input type="radio"/> Information about area or region	3%

Changes in radio over time

Q *Do you think the programmes provided by radio broadcasters in general have improved, remained the same or got worse?*

Q *Thinking about the radio programmes provided by the BBC, do you think these have improved, remained the same or got worse over the years?*



6. Definition of terms

Weekly Share as a %

The percentage of all radio listening hours that a station accounts for within its transmission area.

Weekly Reach as a %

The weekly reach, the number of people aged 15+ who tune to a radio station within at least 1 quarter-hour period over the course of a week, expressed as a percentage of the Population within the total survey area (TSA).

Average Hours

The average length of time that listeners to a station spend with the station. This is calculated by dividing the total number of hours listened to by the weekly reach.

BBC Public Value definitions:

- **Democratic value** – to support active and informed citizenship by providing trusted, impartial, in-depth news and information that help people make sense of the world.
- **Cultural value** – to enrich the cultural life of the nation by enabling the UK's best creative talents to produce great original work and provide a broad range of memorable and enjoyable programmes and events.
- **Educational value** – contribute to education for all by creating a wide range of accessible programmes and services that feed curiosity and enable people to learn throughout their lives.
- **Social and community value** – help make the UK a more inclusive society by providing programmes and services that connect communities, encourage participation and help build a sense of place and belonging.
- **Global value** – support the UK's global role by being the world's most trusted provider of international news and by showcasing the best of British culture to a global audience.