

Attitudes to BBC and Commercial Radio

September 2004

BBC commissioned independent research produced in
consultation with the DCMS

Methodology

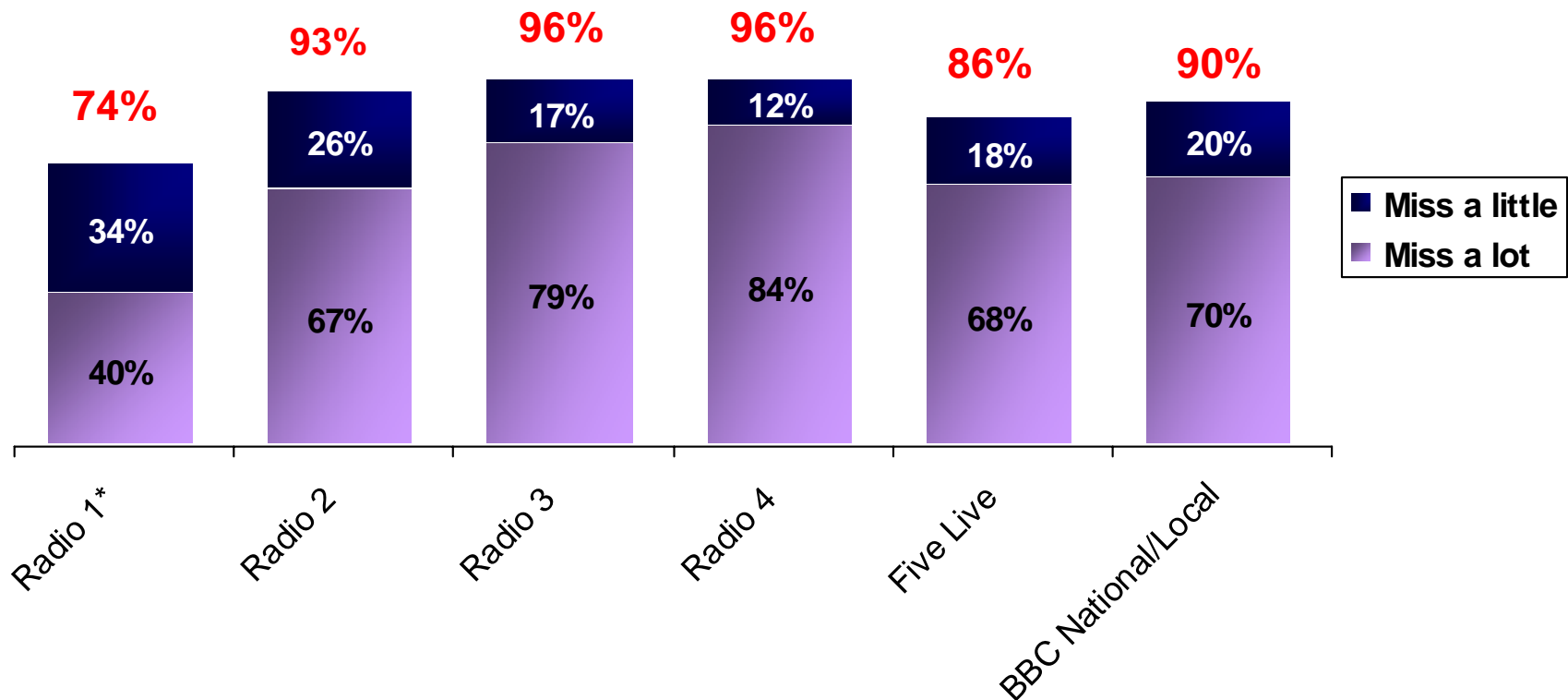
- This document reports on the key findings from a piece of research commissioned to understand audiences attitudes towards, and perceptions of, BBC and commercial radio services and their relevant output.
- The survey was conducted via The Quest Panel in week 22 (24th-30th May 2004).
- The Quest panel is independently run and owned by Ipsos-RSL on behalf of major UK broadcasters and the broadcast industry regulators. It is sponsored by BBC and ITV although major clients also include OFCOM and other broadcasters.
- The panel provides appreciation data for Radio and Television and can also be used to ask bespoke questions about programmes and services.
- Data is collected via a self completion questionnaire amongst 4077 adults aged 16+ and is representative of the UK population by sex, social grade, region, multi-channel ownership and social class.

Summary

- Radio continues to be an important part of everyday life and radio listeners place high value on the radio stations they listen to. Both BBC and commercial stations are considered important in peoples' lives and the vast majority of listeners would miss their radio station if it was to go off air.
- When asked if there were similar alternatives to listen to should their station cease to exist, the majority of BBC listeners said there was little alternative, although answers did vary by station. Listeners to Radio 1 and Radio 3 were most likely to cite an alternative commercial station, whereas Radio 2, Radio 4 and Five Live listeners were more likely to mention other BBC stations as substitutes. Radio 1 operates in the most competitive environment with hundreds of stations available, most seeking to serve Radio 1s key target of 15-24s.
- Radio listeners want to listen to a wide range of music and speech programming on the radio and both areas are considered equally important. News and current affairs, impartial reporting, British music, 70s, 80s music, comedy and Pop music were the most popular types of content that people wanted to hear on the radio.
- BBC radio stations were perceived to be particularly good at delivering a wide range of genres and types of programmes. Of the 33 music genres and types or programme considered important, BBC stations were named best for 30 of them.
- Strengths of individual stations identified were:
 - Radio 1: British music/supporting British music and promoting new talent
 - Radio 2: Playing a wide range of music
 - Radio 3: Live classical, arts & culture
 - Radio 4: News and current affairs, comedy, documentaries, arts and culture
 - Five Live: Live sports commentary
 - BBC National/Local: Discussions/phone ins, reflecting life in your region
 - Local Commercial radio: Pop music and programmes you can interact with

How much would listeners miss their BBC station if it closed down?

The vast majority of BBC Radio listeners said they would miss their station if it closed down tomorrow. In the case of Radio 2, Radio 3 and Radio 4 listeners almost all listeners would feel the loss.



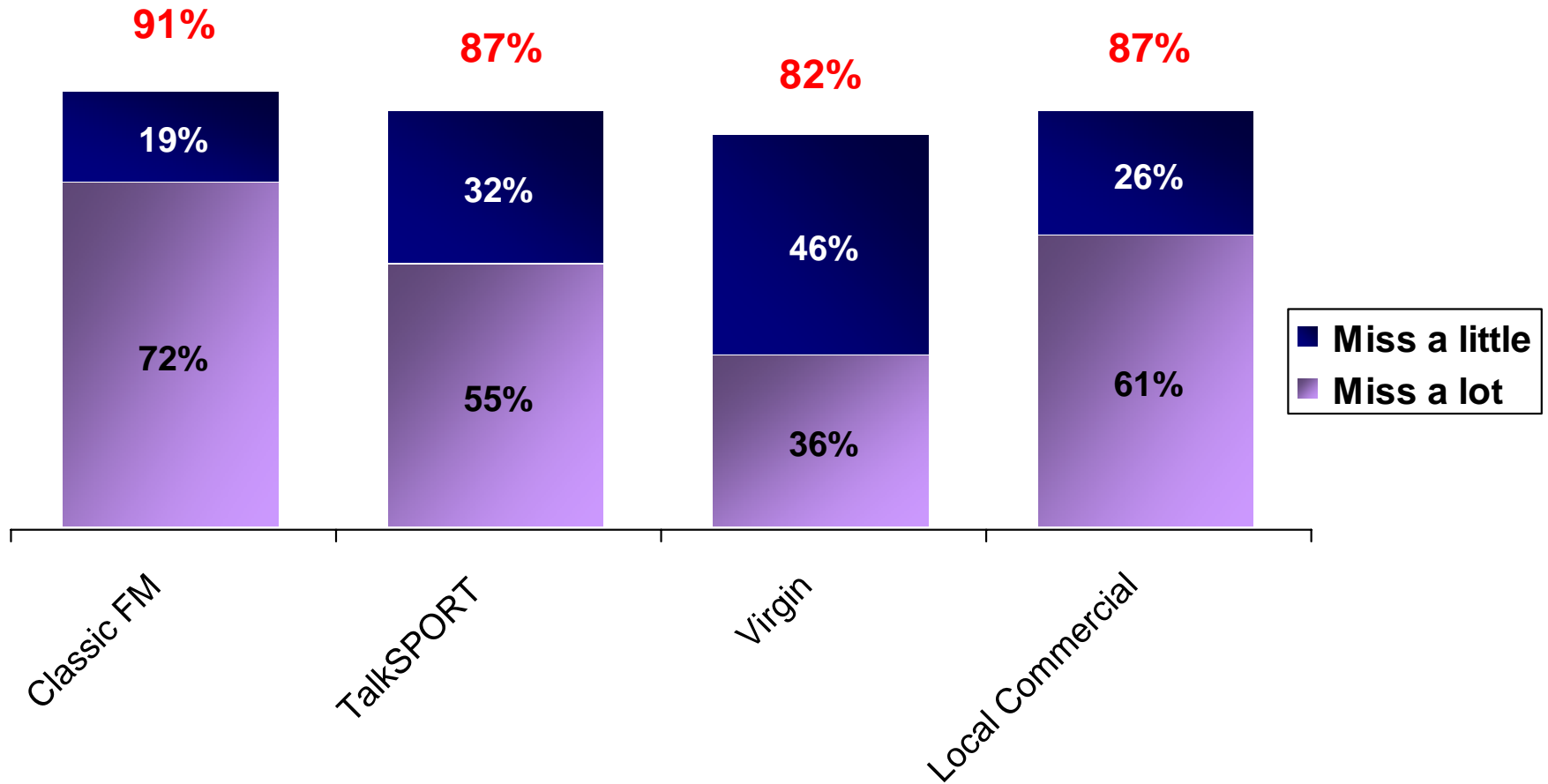
Data based on weekly listeners to each station

*Figures for 16-24s (Radio 1s key target) are significantly higher, please refer to slide 13

Source: Quest/Ipsos/RSL Week 22 2004

How much would listeners miss their commercial station if it closed down tomorrow?

The same pattern emerges for commercial radio listeners. In each case more than 8 out of 10 listeners would miss their station if it closed down tomorrow.

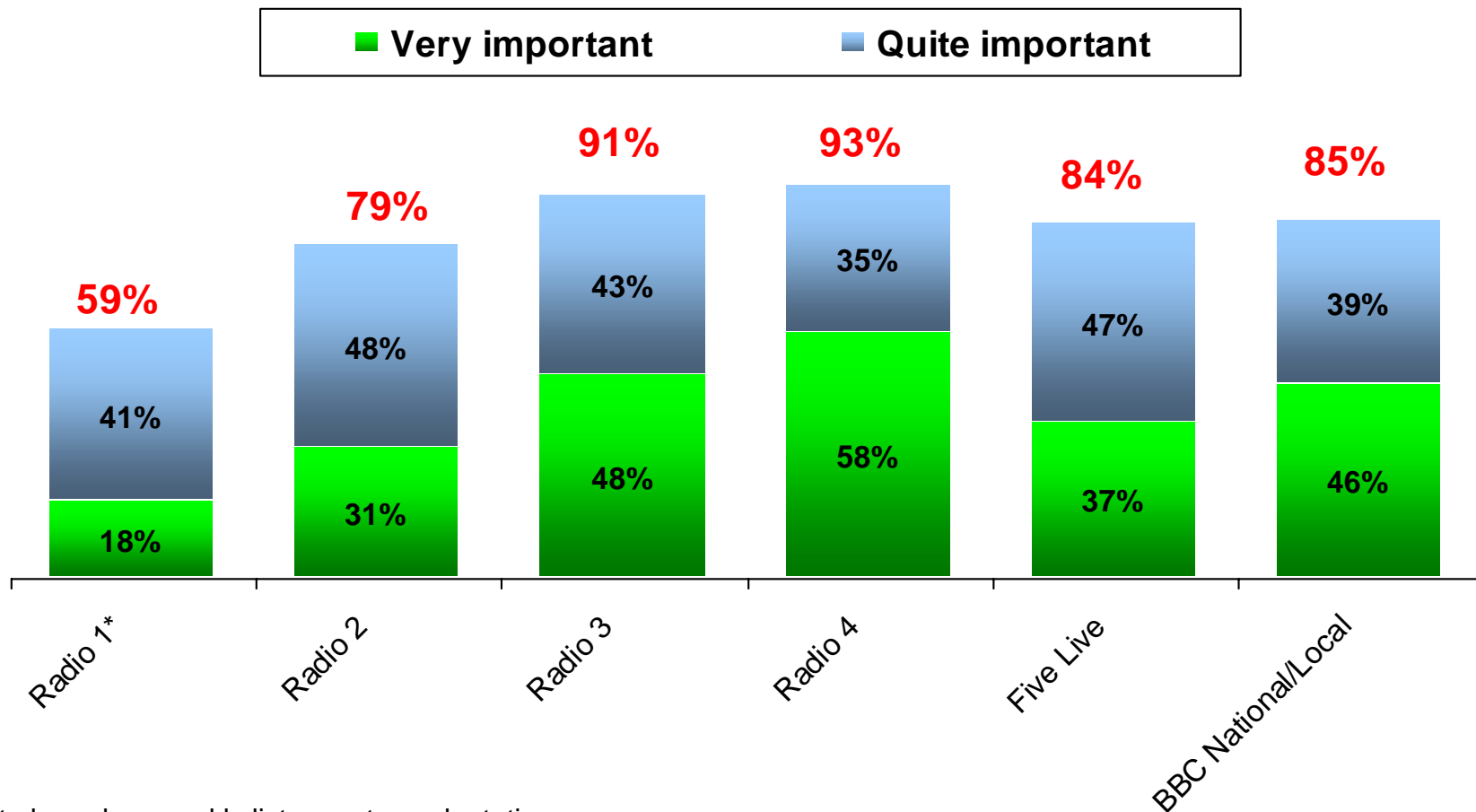


Data based on weekly listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

How important, in your everyday life, are the BBC radio stations you listen to?

Radio is an important medium, playing a significant role in the lives of the vast majority of radio listeners. For 58% of the Radio 4 audience the station plays a **very** important part in their life. Radio 1 listeners were least likely to say their station was important in their everyday life, although it still played an important part for the majority of listeners, and in particular the stations key target of 16-24s (figure rises to 71%).



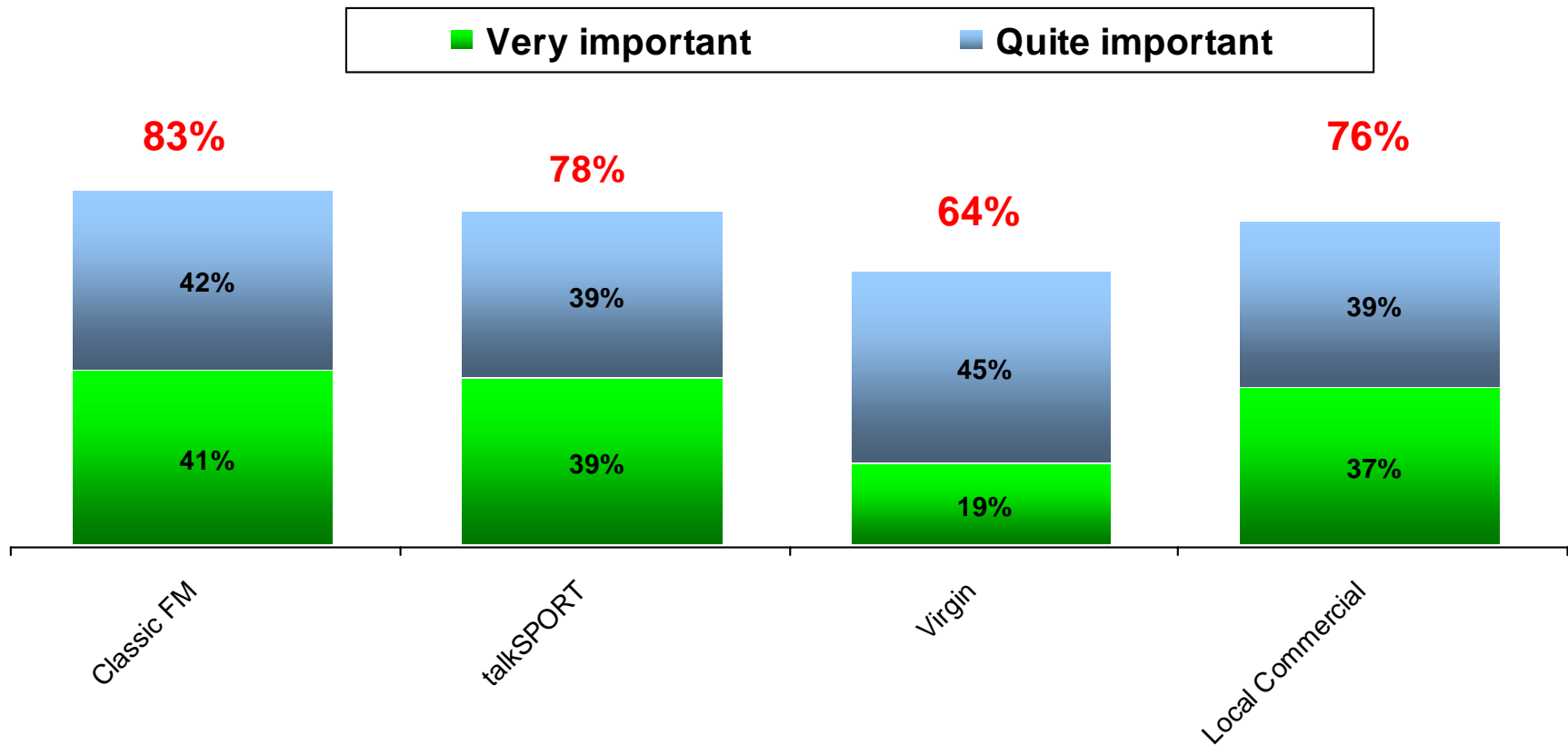
Data based on weekly listeners to each station

*Figures for 16-24s (Radio 1s key target) are significantly higher, please refer to slide 14

Source: Quest/Ipsos/RSL Week 22 2004

How important, in your everyday life, are the commercial radio stations you listen to?

As with the BBC networks (see previous slide), both national and local commercial radio stations play a significant role in the lives of their listeners. 83% of Classic FM listeners said Classic FM was important in their everyday life and almost 8 in 10 talkSPORT and independent local radio listeners said their stations were important to them.



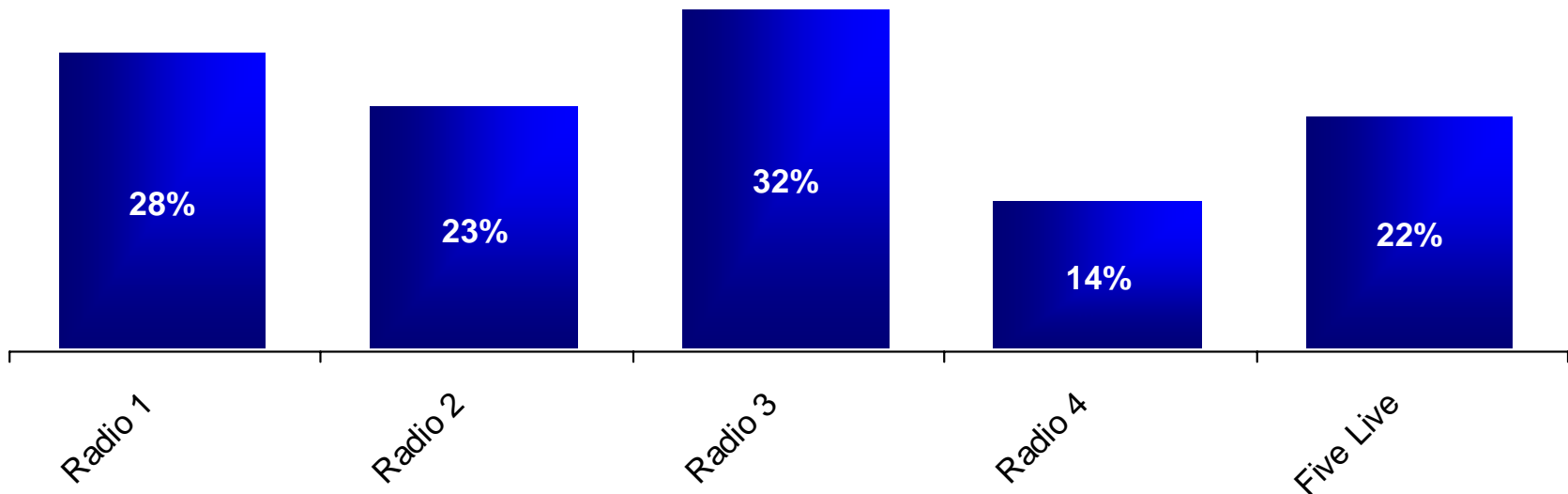
Data based on weekly listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Alternative stations to listen to

In each case, for BBC speech and music stations, a large majority of listeners could think of no comparable alternative that they would listen to should their BBC station go off air. For example, only 14% of Radio 4 listeners could think of an alternative to Radio 4 and amongst those that did mention another station they quoted other BBC station such as Radio Five Live, Radio 2 and World Service. Radio 3 listeners were most likely to say they could think of an alternative station to listen to: the vast majority of listeners mentioned Classic FM, although BBC stations such as Radio 2 and Radio 4 were also popular substitutes. Radio 1 listeners were more likely to mention local/regional commercial stations, not surprising given the hundreds of music stations available that are seeking to serve the younger audience that Radio 1 target. For Radio 2 listeners Radio 4 was a popular alternative but commercial easy listening stations such as Magic, Saga, Classic FM and Heart were possible options.

% of listeners to each station who could think of an alternative station to listen to



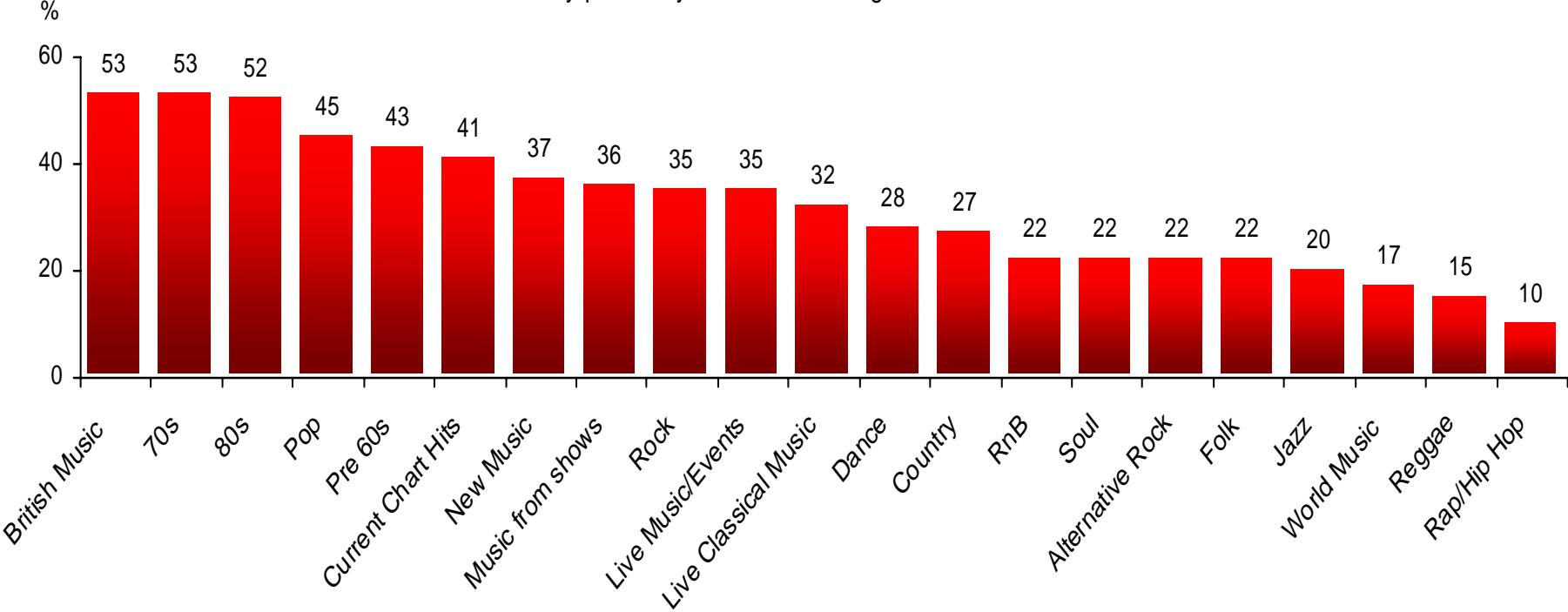
Data based on weekly listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Importance of music genres on the radio

Radio listeners quoted a wide range of music genres they personally like to hear on the radio, from British music to music from across the decades. Pop music, current chart hits, and new music were popular. Not surprisingly music preference did differ by age (see later slides).

% who said they personally like to hear each genre of music on the radio



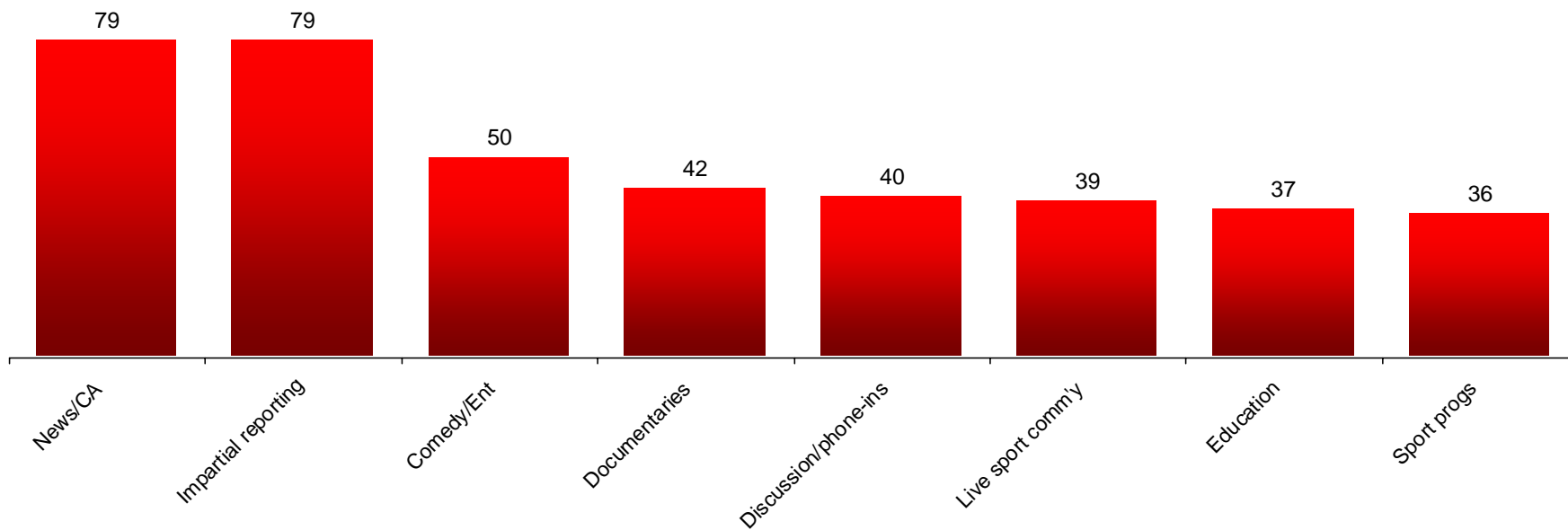
Base: all radio listeners

Source: Quest/Ipsos/RSL Week 22 2004

Importance of speech genres on the radio

Almost 8 in 10 radio listeners said they personally like to hear news & current affairs programmes and impartial news reporting on the radio (higher than music genres). Entertainment/comedy, documentaries and discussions/phone ins were also important types of radio programme. Speech genres were of more importance to the older demographics (35+). Around a third of radio listeners said they personally like to hear sports programmes and live sport commentary although this was of particular interest to men.

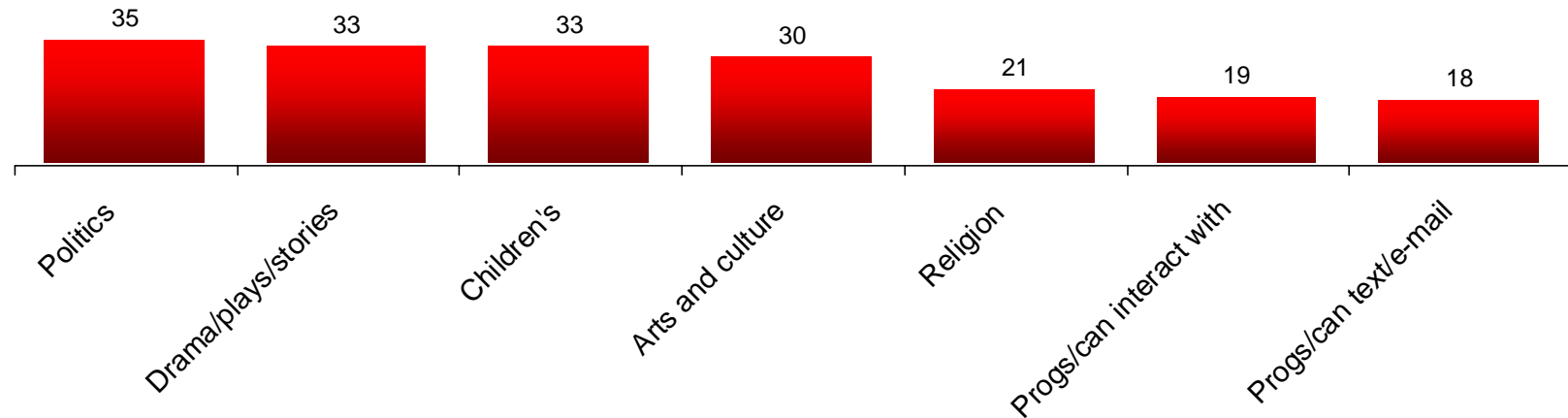
% who said they personally like to hear each genre on the radio



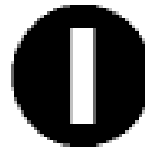
Source: Quest/Ipsos/RSL Week 22 2004

Importance of speech genres on the radio - 2

Political programmes, drama and programmes for children were important to around a third of radio listeners, with cultural and religion programmes of slightly less interest. Interacting with radio programmes was of interest to around 20% of radio listeners.



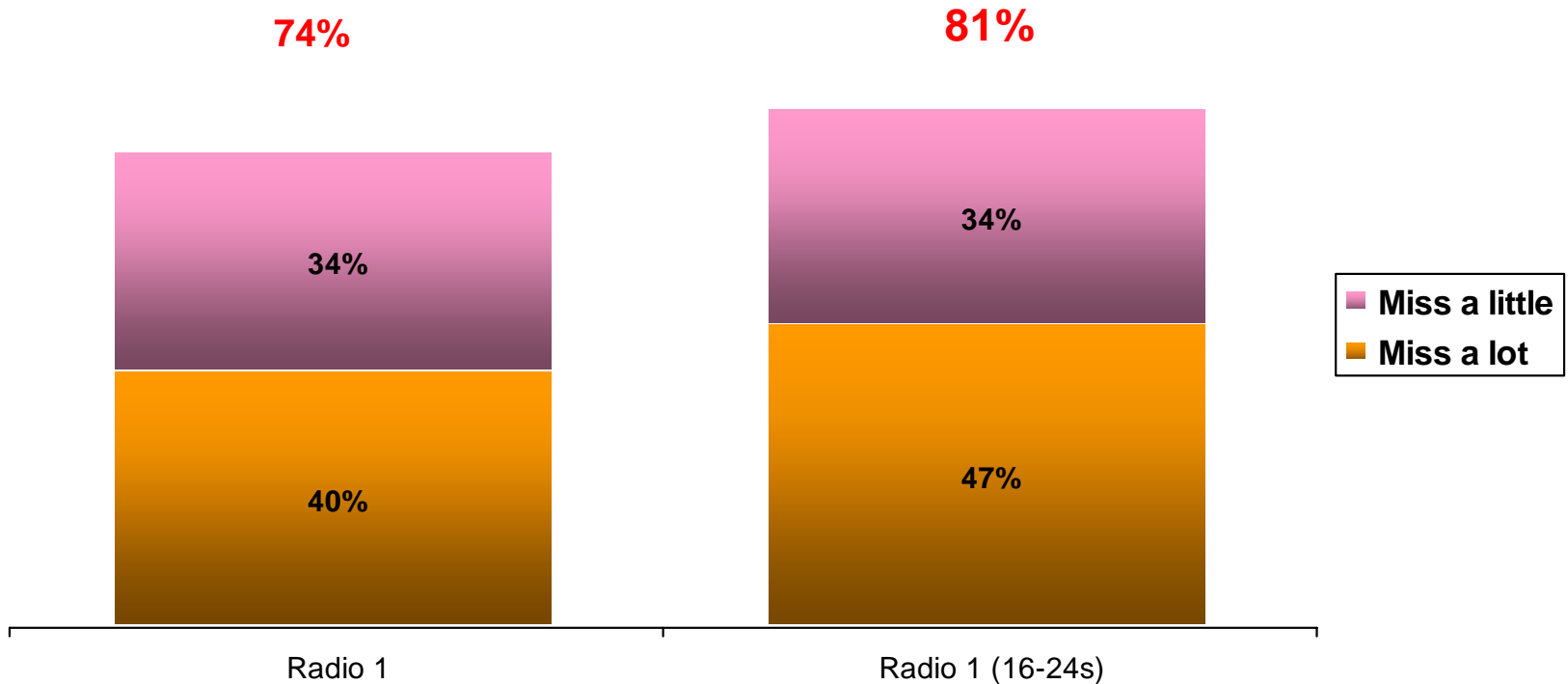
Source: Quest/Ipsos/RSL Week 22 2004



- 3 in 4 Radio 1 listeners would miss the station if it closed down tomorrow and 40% would miss it a lot. 3 in 5 feel it is important in their everyday lives and only 1 in 4 could think of another comparable station that they would listen to
- Amongst 16-24 year olds Radio 1 is considered better than the competition in 9 out of 10 relevant music genres. It is beaten, albeit narrowly, only on Pop by commercial radio.
- Radio 1 is particularly strong versus the competition at delivering *New music not in the charts, dance, rap/hiphop* and *live music/events*
- Over half of 16-24s consider Radio 1 as the station best for supporting the British music industry and a similar number best for promoting new talent. This is considerably more than for commercial radio
- When asked to describe Radio 1 almost half of 16-24s say Radio 1 understands the needs of their generation; and almost 40% believe the network has the best presenters.
- Around 1 in 4 16-24s think the station is particularly good for impartial news reporting.

How much would listeners miss their station if it closed down tomorrow?

74% of Radio 1 listeners would miss Radio 1 if it closed down tomorrow – 40% would miss it a lot. This rises to 81% amongst 16-24 year old listeners.

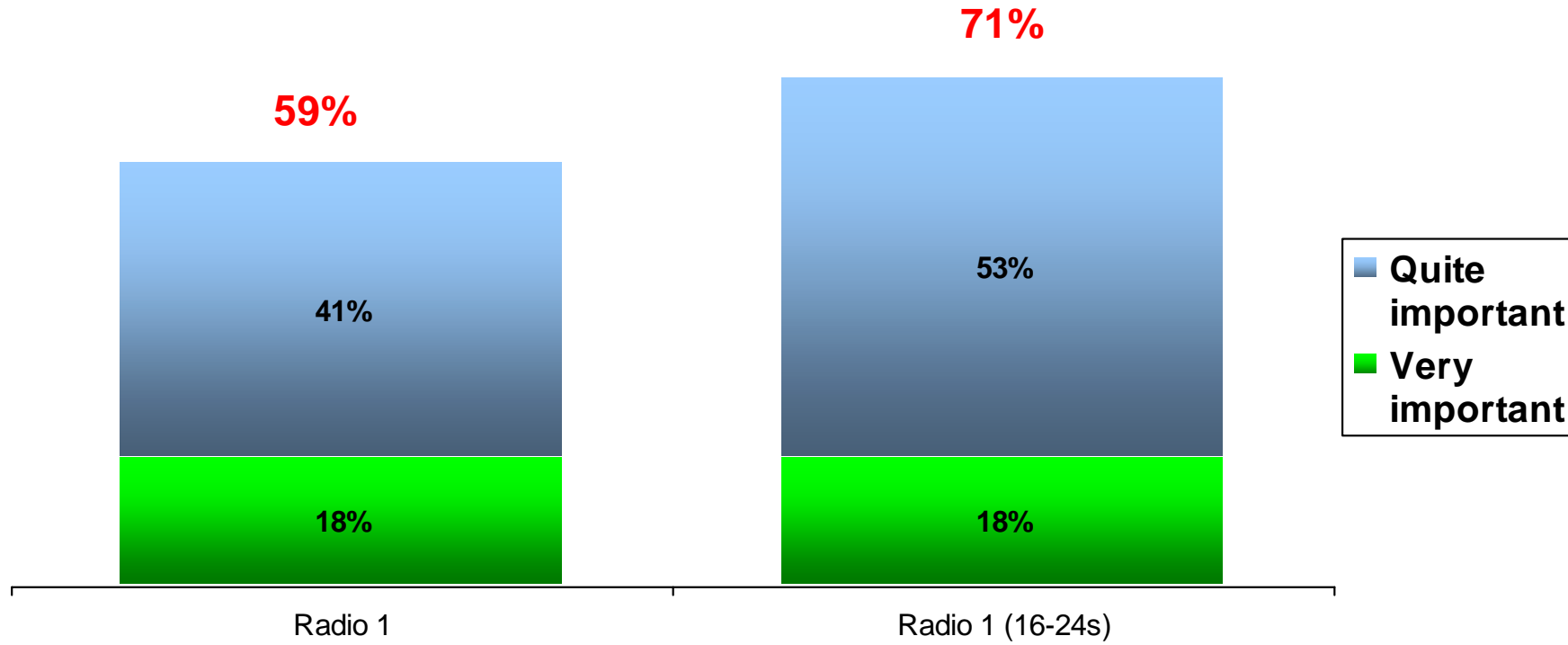


Data based on weekly listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Importance of radio stations in listeners everyday lives?

For 59% of Radio 1 listeners, Radio 1 is important in their everyday lives. Radio 1 is more important to its key target audience, the figure rising to 71% amongst 16-24 year olds.

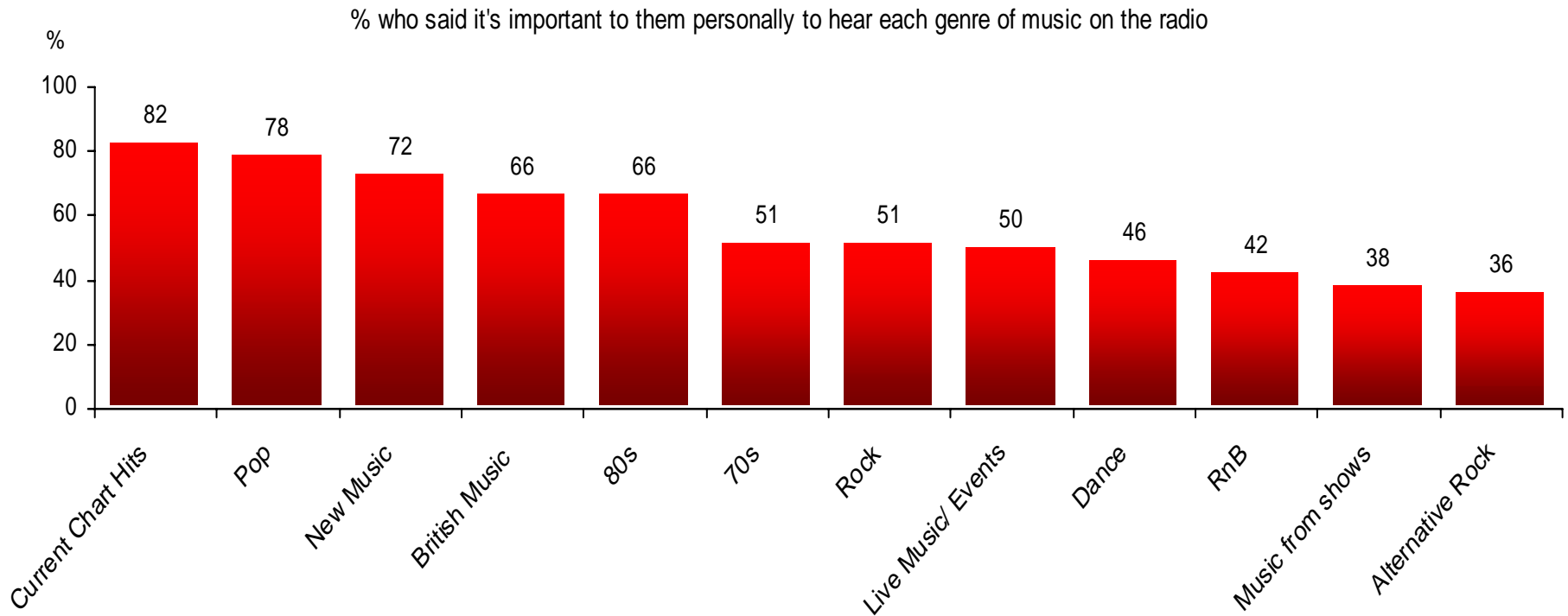


Data based on weekly listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Top music genres amongst 16-24s

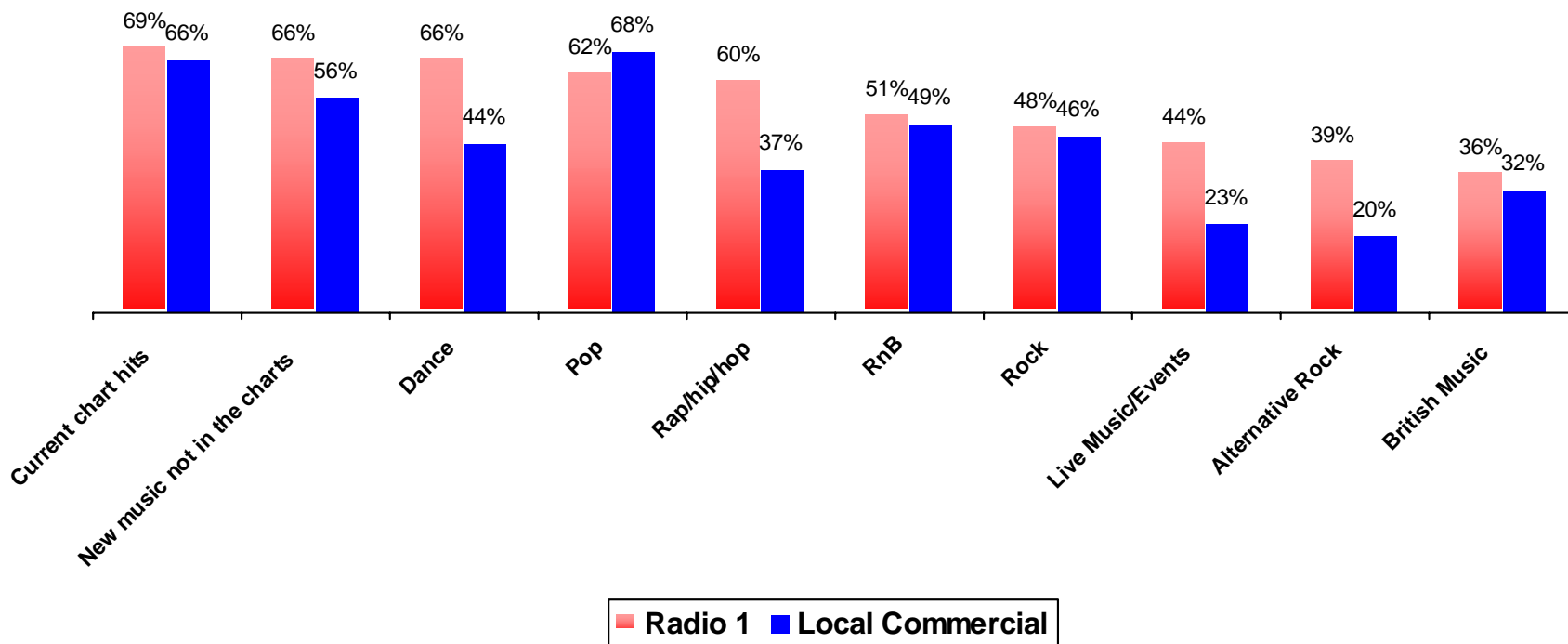
Current chart hits, pop, new and British music were the most popular genres of music that 16-24s like to hear on the radio. Older music also strikes a chord for over half of young people (for example 70s and 80s music). Live music and events are also important.



Source: Quest/Ipsos/RSL Week 22 2004

Top 10 types of music that Radio 1 are particularly good at, compared with Local Commercial amongst 16-24s

This chart shows the % of 16-24 listeners to each station (Radio 1 and Local Commercial radio) who think their station is particularly good at each genre of music. For example, 66% of 16-24 Radio 1 listeners think that Radio 1 is particularly good at broadcasting new music not in the charts compared to 56% for local commercial stations. Pop music is the only music genre where local commercial radio is perceived to be better than Radio 1 amongst their listeners.

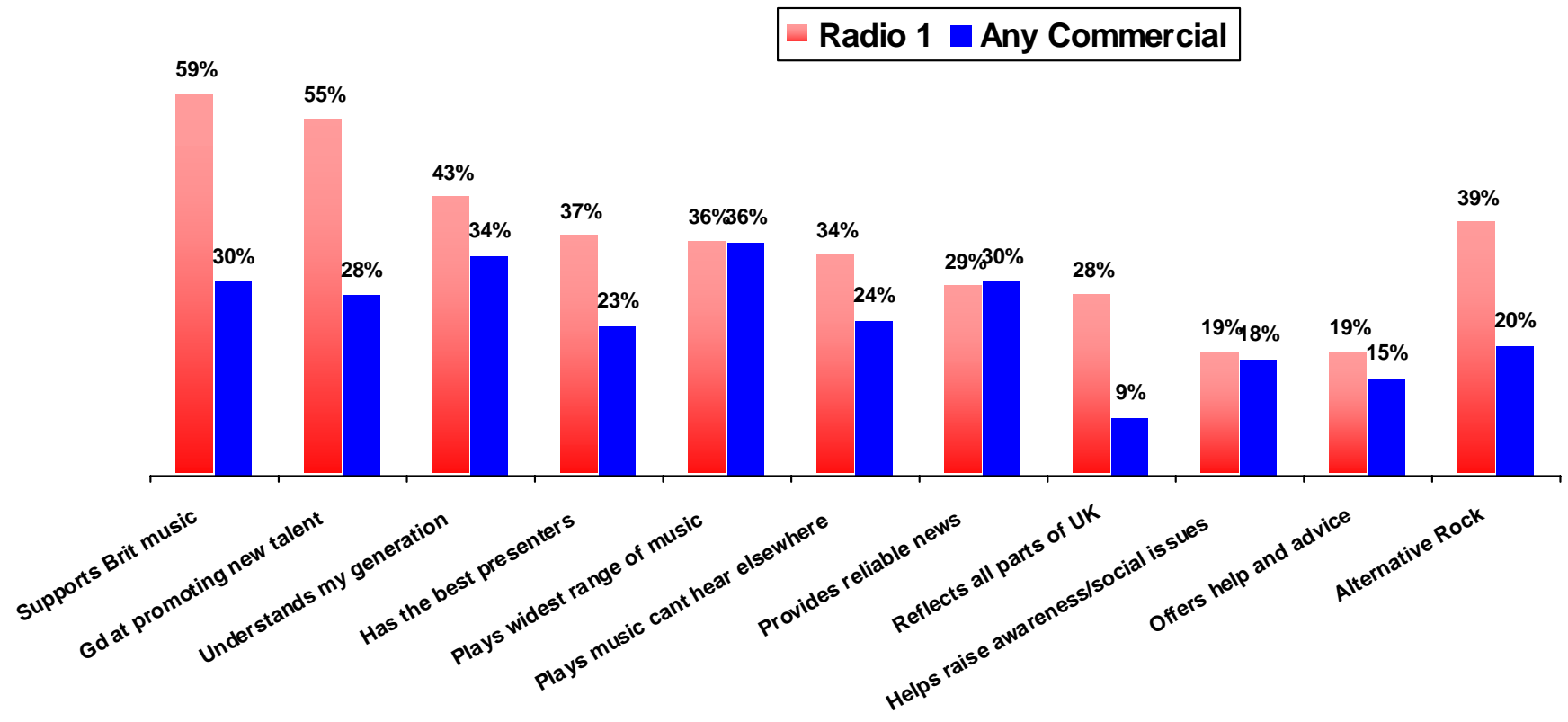


Data based on listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

How 16-24s best describe Radio 1 and Local Commercial Radio

Over half of 16-24 Radio 1 listeners would say Radio 1 “supports British music” and is “good at promoting new talent”, more than 16-24 listeners of local commercial radio (30% and 28% respectively). Radio 1 and local commercial radio are on a par when it comes to playing a wide range of music and providing reliable news.



Data based on listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

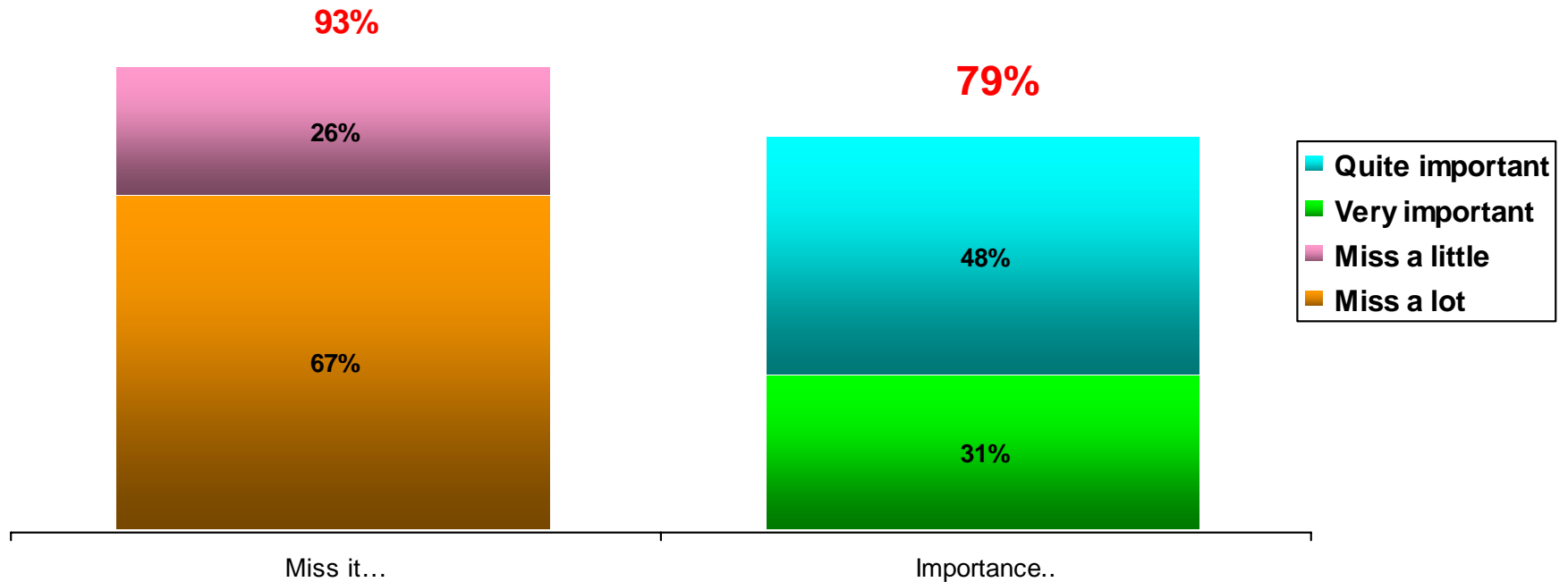
Alternatives to Radio 1:

- Q. *If Radio 1 closed down tomorrow, is there a similar station that you would listen to that has similar types of music/programmes? If yes, what is it?***
- 28% of Radio 1 listeners thought there was at least one alternative radio station they could tune to, with 2 in every 3 of those mentioned local FM commercial stations.
 - Radio 1 operates in the most competitive arena with hundreds of music stations on offer, most of which seek to serve the younger demographics.
 - About one in ten mentions were other BBC stations, led by Radio 2, various BBC Local and 6Music, but most of these were named by people aged 35+
 - Most popular individual stations mentioned:-
 - Virgin (34 mentions)
 - Capital FM
 - Galaxy
 - Radio 2
 - Vibe FM (Dance station, East Anglia)
 - Heart
 - Kiss 100

- There is a strong attachment to Radio 2 amongst its listeners. 2 out of 3 would miss the station a lot if it went off air and 4 in 5 consider it important in their everyday lives. Fewer than 1 in 4 thought there was an obvious alternative to listen to.
- Over half of those who have ever listened to the station consider Radio 2 best for 70s, 80s and pre-60s music – three genres which are also seen as very important in overall radio enjoyment.
- Almost half of those who have ever listened view it as best for music from shows and for country music. Around 4 in 10 think it is best for comedy and entertainment and a third think it is best for British music, live music/events and jazz.
- In all these genres Radio 2 outperforms commercial competitors such as Virgin and independent local radio.
- More than 1 in 3 listeners describe Radio 2 as playing a wide range of music, catering for all tastes and setting high professional standards.
- The station also fares favourably for non-music genres such as news and religion.

How much would listeners miss Radio 2 if it closed down tomorrow and how important is it in their everyday lives?

93% of Radio 2 listeners would miss Radio 2 if it closed down tomorrow and 79% consider Radio 2 to be an important part of their everyday life.

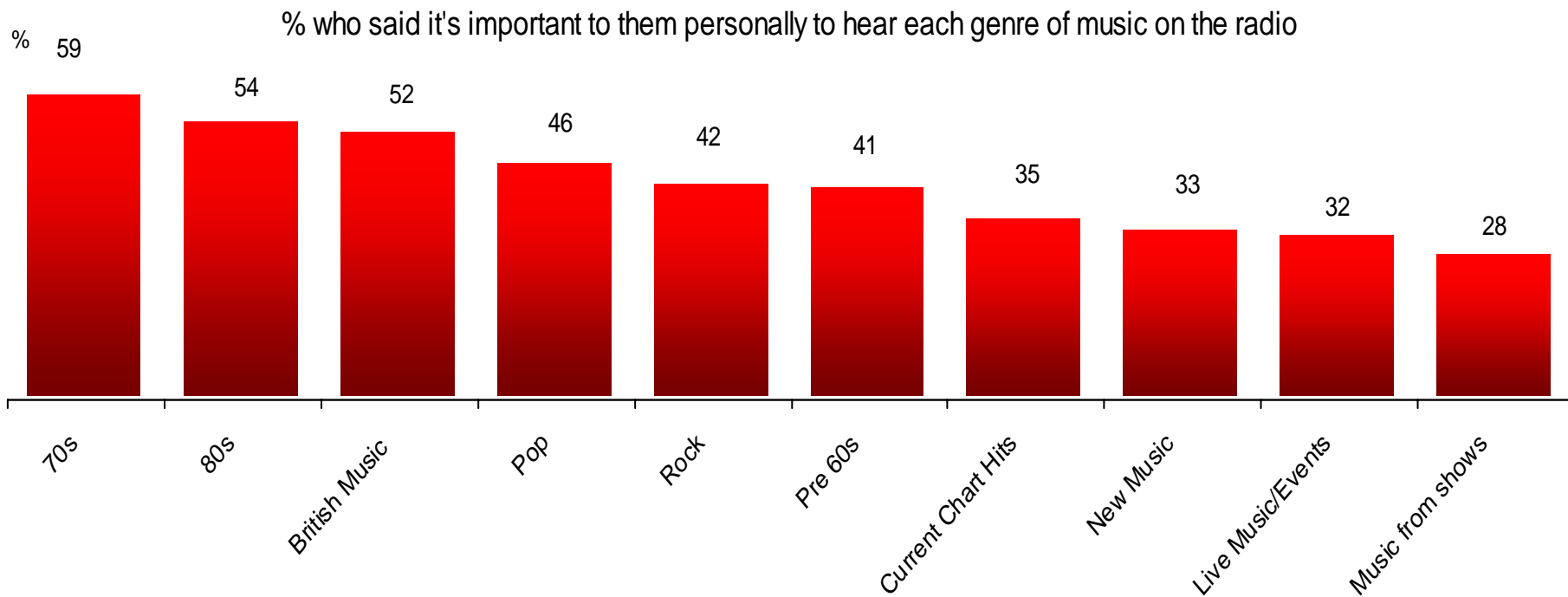


Data based on weekly listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Top 10 music genres amongst 35-54 year olds

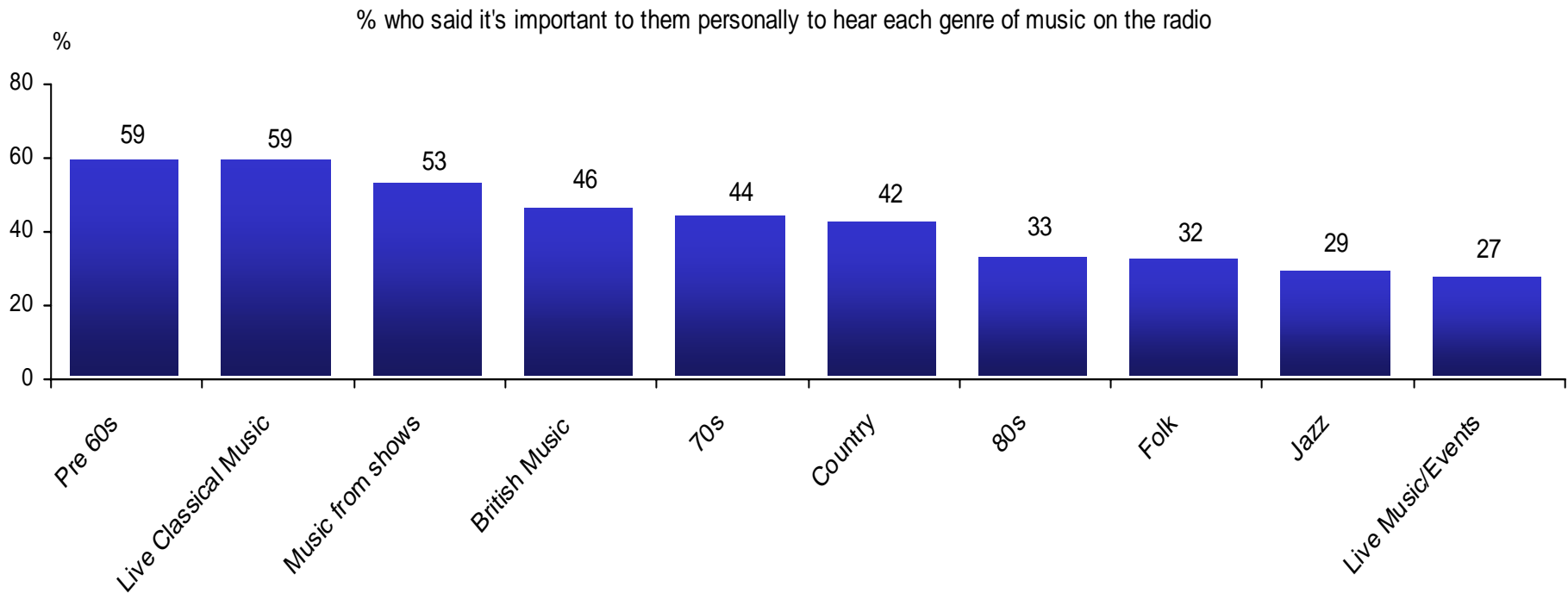
35-54 year olds have a wide range of tastes from '70s and '80s music which are the most popular genres to British music, Pop, Rock and new music. Around a third are interested in hearing live events on the radio.



Source: Quest/Ipsos/RSL Week 22 2004

Top 10 music genres amongst over 55s

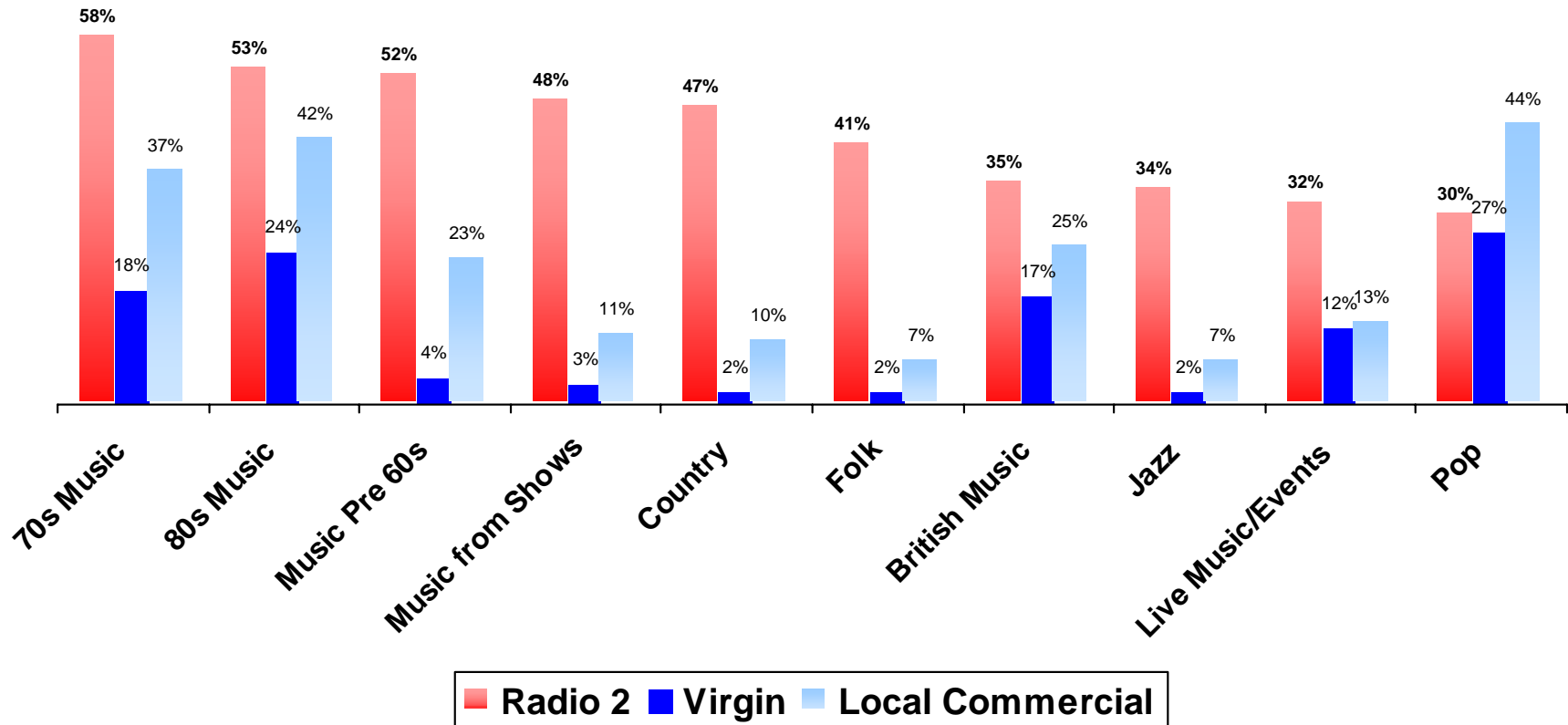
Music from before the 60s and live classical music is more prominent amongst the tastes of older people. Genres such as country, folk and jazz also make an appearance. Just over a quarter are interested in hearing live events on the radio.



Source: Quest/Ipsos/RSL Week 22 2004

Top 10 types of music that Radio 2 is particularly good at, compared with Virgin and Local Commercial

Radio 2 is perceived to be particularly good at a wide range of music genres compared to the competition. The exception is Pop: local commercial radio listeners were more likely to say their local commercial station was particularly good at Pop compared to Radio 2 listeners.

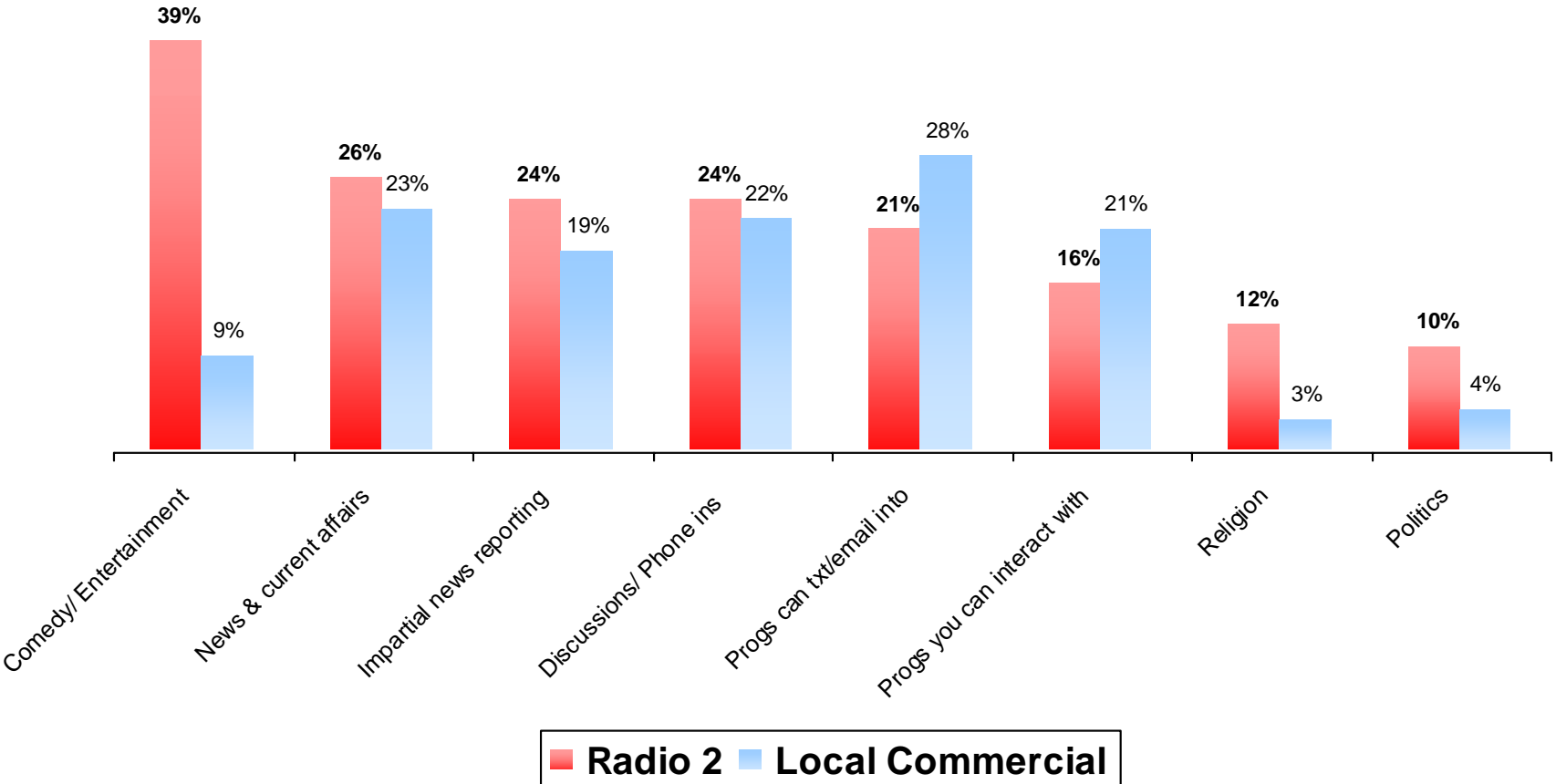


Data based on listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Types of programmes each station is considered to be particularly good at

Over a third of Radio 2 listeners say that Radio 2 is particularly good at comedy/entertainment programmes compared to only 9% for local commercial radio. Radio 2 is also perceived to be better at news and current affairs, impartial news reporting, religion and political programming. Local commercial radio is perceived to be better at programmes you can interact with.

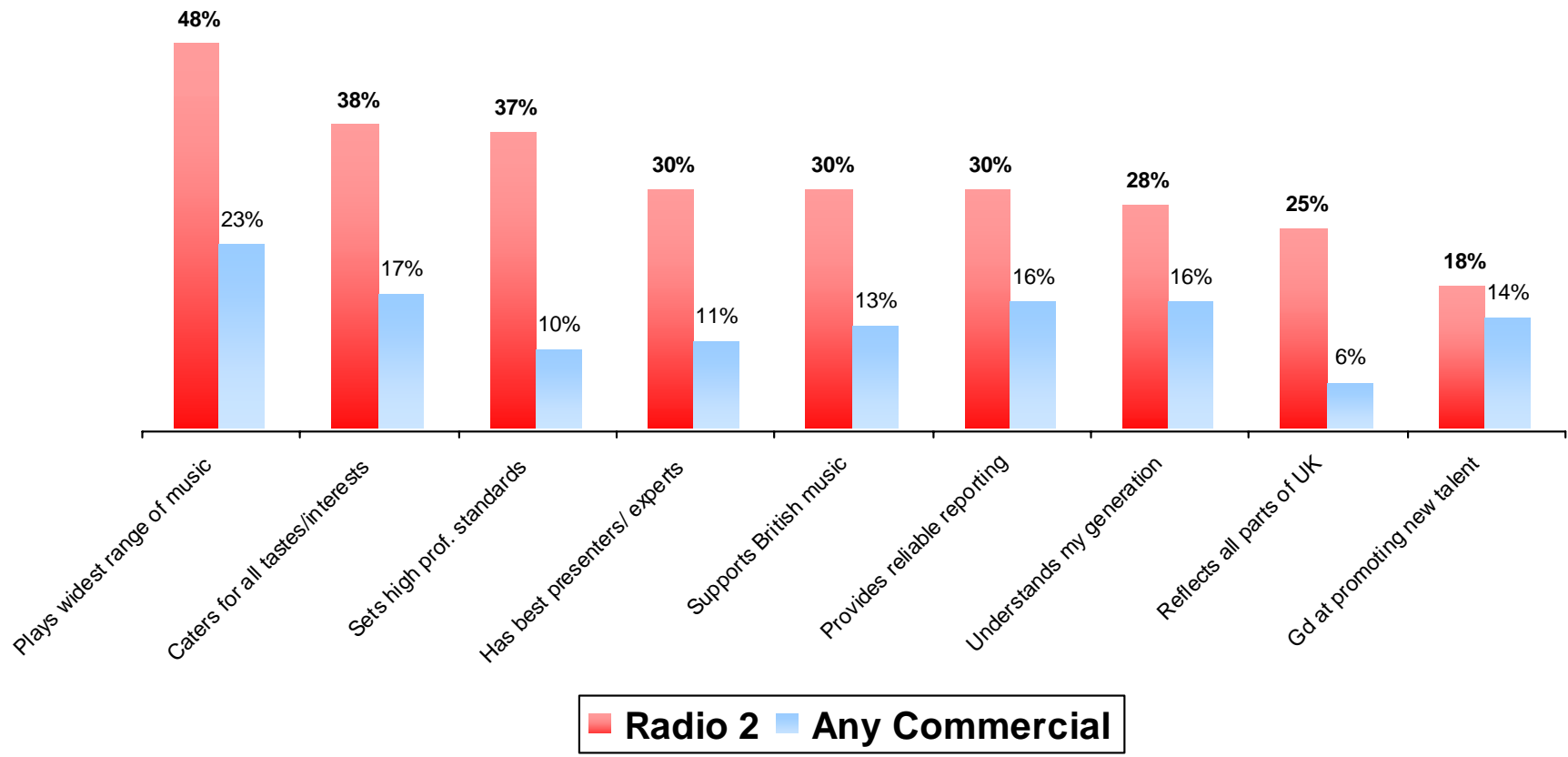


Data based on listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Statements that best describe Radio 2

Almost half of all Radio 2 listeners say that Radio 2 *plays the widest range of music*, compared to just under a quarter of local commercial radio listeners who think local commercial radio plays the widest range of music. Over a third of Radio 2 listeners perceive Radio 2 to *cater for all tastes/interests* and *sets high professional standards*.



Data based on listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

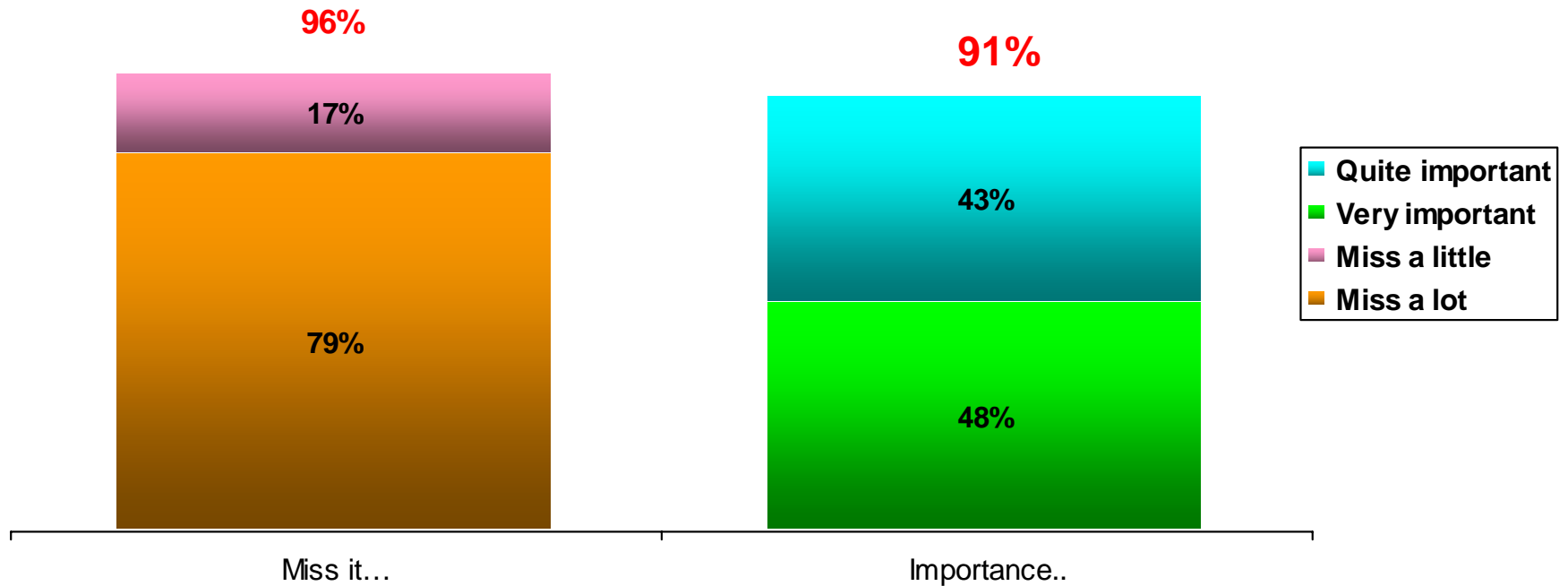
Alternatives to Radio 2:

- Q. *If Radio 2 closed down tomorrow, is there a similar station that you would listen to that has similar types of music/programmes? If yes, what is it?*
- 23% of listeners thought there was at least one alternative to Radio 2 they'd tune to.
 - Just over a half of those mentioned were local or regional commercial stations, a mixture of FM and AM Gold services
 - One in three mentions were for other BBC stations, mostly BBC Local/National, but also Radio 4, Radio 1 and Radio 3
 - Most popular individual stations mentioned:-
 - Radio 4 (24 mentions)
 - Magic
 - Saga
 - Classic FM
 - Heart FM
 - Capital Gold
 - Radio 1

- Almost all Radio 3 listeners (96%) would miss the station if it closed and half say it's very important in their everyday lives.
- 1 in 3 could contemplate listening to an alternative (mostly Classic FM) should Radio 3 go off the air.
- Radio 3 is seen as being best for live classical music and it is also associated with other live music/events.
- Jazz, World music and British music are key strengths of Radio 3. 1 in 3 describe the station as playing music you can't hear elsewhere on radio.
- Radio 3 is also widely recognised as being good at Arts and culture, with 45% agreeing with the statement, and almost a third consider it to have the best presenters/experts in their field.

How much would listeners miss Radio 3 if it closed down tomorrow and how important is it in their everyday lives?

Radio 3 plays an important role in the lives of its listeners. 96% of Radio 3 listeners said they would miss Radio 3 if it closed down tomorrow, with almost 8 in 10 saying they would miss it a lot. 91% of Radio 3 listeners consider the station important in their everyday lives .

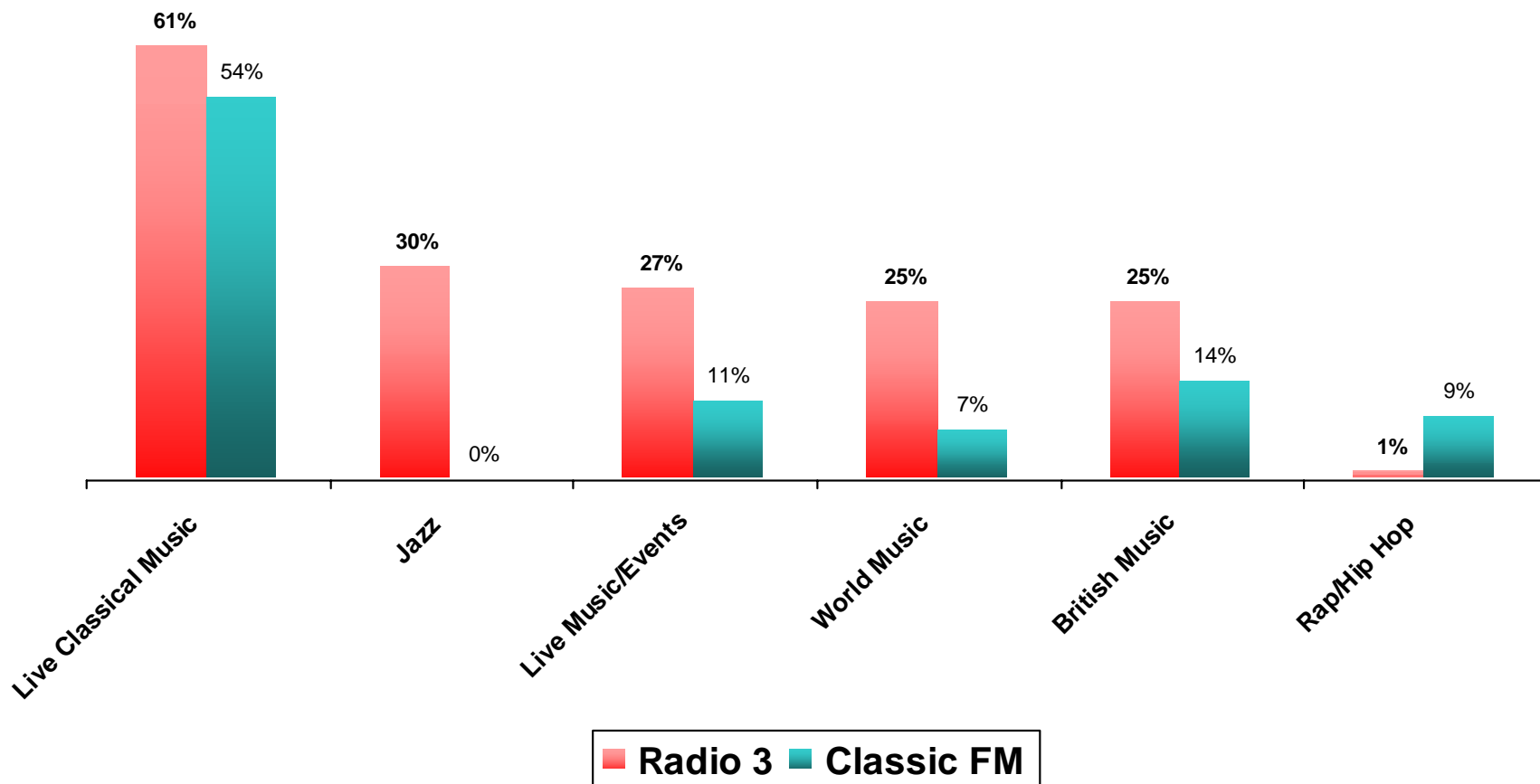


Data based on weekly listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Types of music that Radio 3 are particularly good at

Just under two thirds of Radio 3 listeners perceive Radio 3 to be particularly good at live classical music. Over half of Classic FM listeners also feel their station is good at this genre. Just under a third say Radio 3 is also good at Jazz and other live music and events.

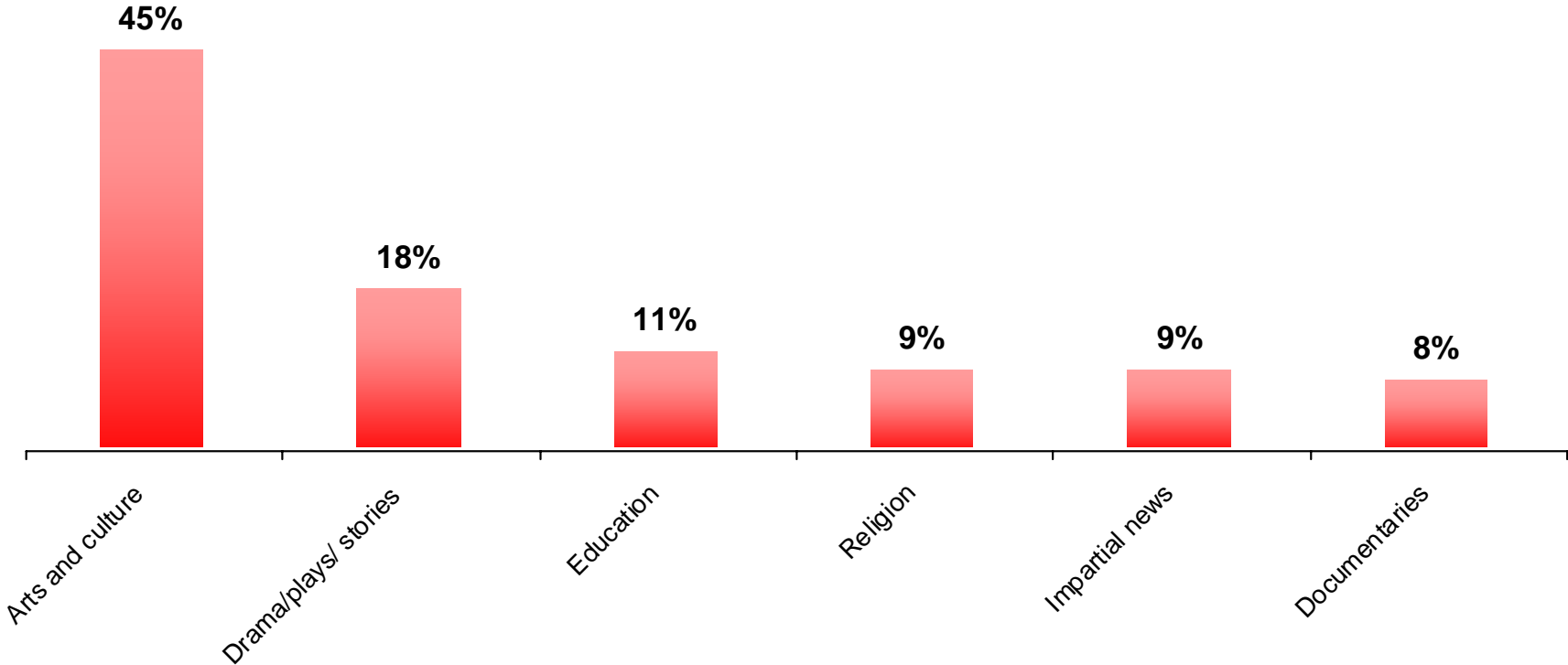


Data based on listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Speech programmes that Radio 3 is considered particularly good at

Almost half of Radio 3 listeners consider Radio 3 to be particularly good at Arts & Culture programmes.

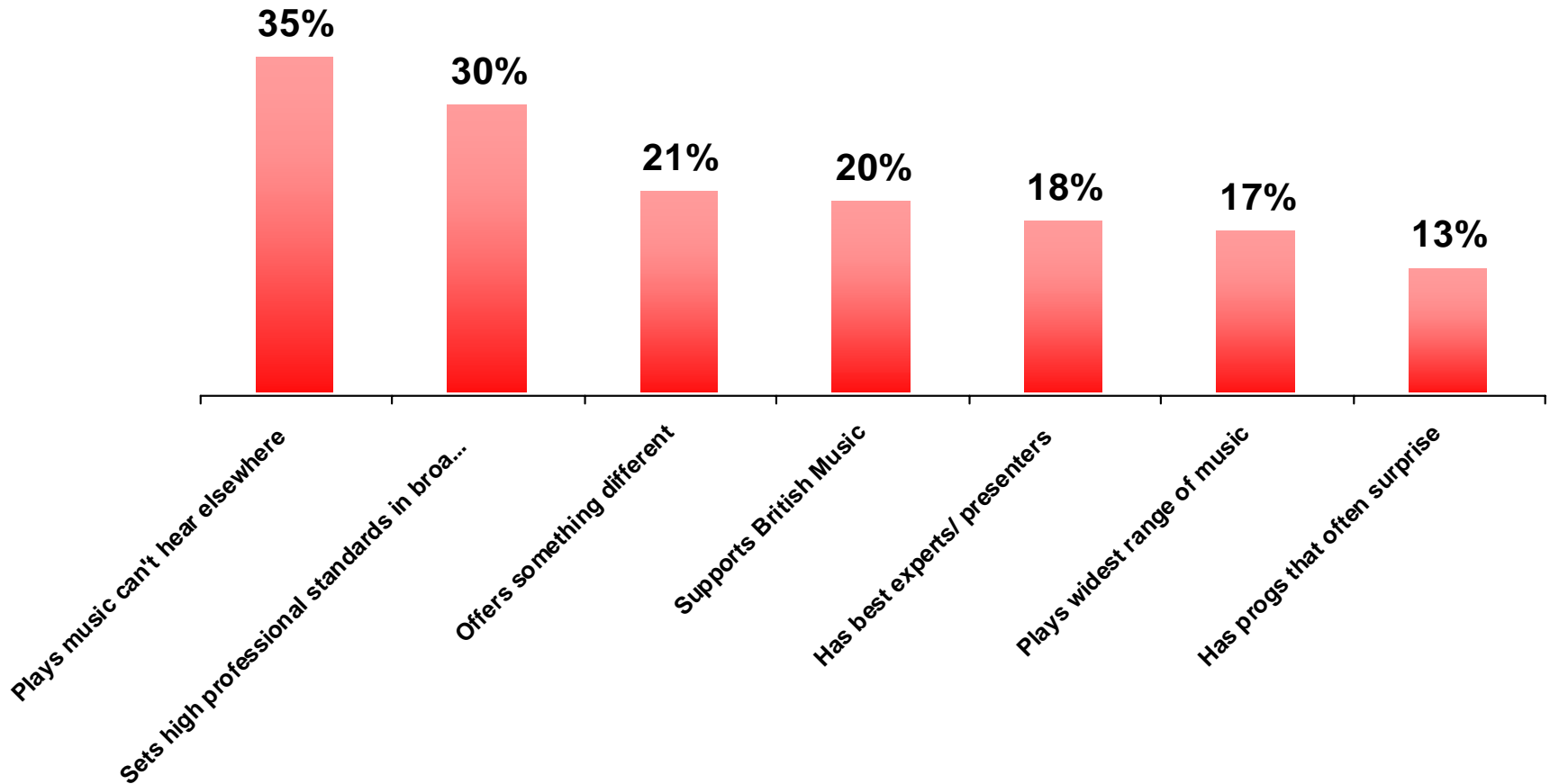


Data based on Radio 3 listeners

Source: Quest/Ipsos/RSL Week 22 2004

Statements that best describe Radio 3

Around a third of Radio 3 listeners felt that Radio 3 “plays music you cannot elsewhere” and “sets high professional standards in broadcasting”.



Data based on Radio 3 listeners

Source: Quest/Ipsos/RSL Week 22 2004

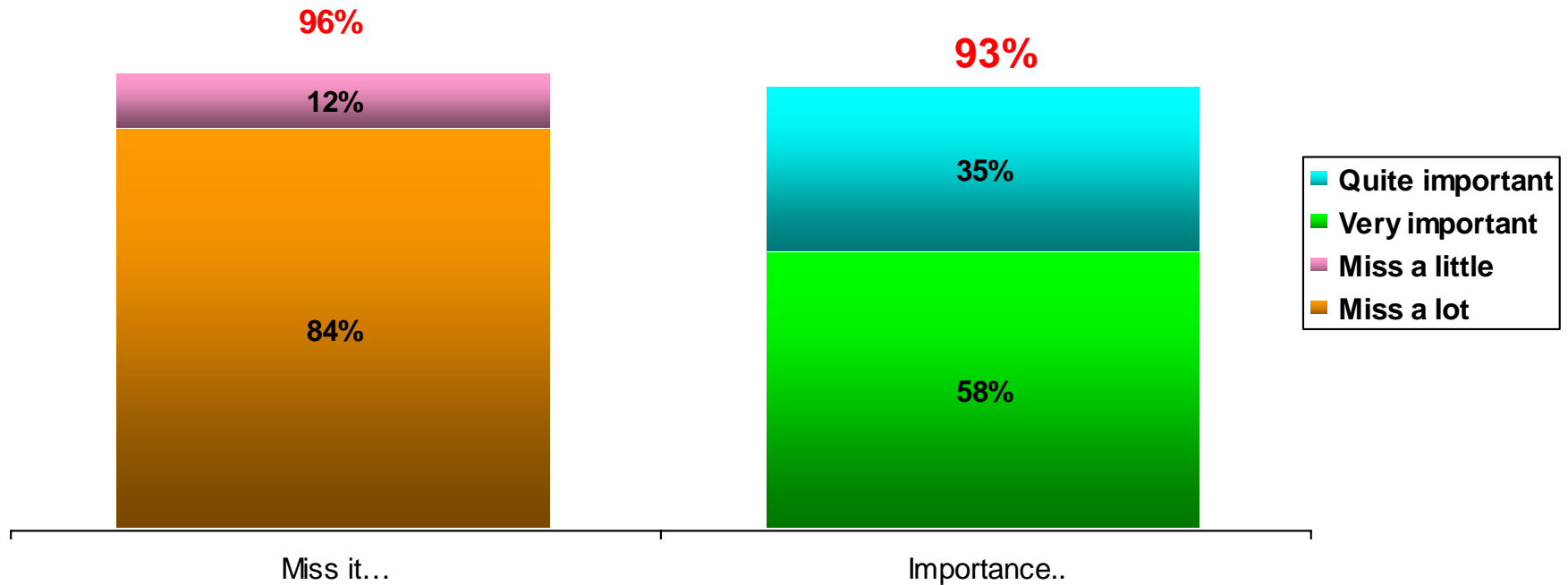
Alternatives to Radio 3:

- Q. *If Radio 3 closed down tomorrow, is there a similar station that you would listen to that has similar types of music/programmes? If yes, what is it?***
- Almost 1 in 3 (32%) of Radio 3 listeners thought there was at least one alternative they'd tune to.
 - Classic FM dominated, with seven out of eight of these people citing the commercial classical music network
 - Only 4 other commercial stations were named (Once each)
 - The only stations mentioned more than once were:-
 - Classic FM (346 mentions)
 - Radio 2 (7)
 - Radio 4 (5)

- Radio 4 has the strongest links with its listeners than any other station. Almost all said they would miss it, the vast majority of whom would miss it a lot. Only 1 in 7 could think of a comparable station they would listen to if it were not on air
- It was also regarded as playing an important role in their everyday lives, with 58% considering it 'very' important
- Over 8 in 10 of those who have ever listened to the station consider it best for drama, plays and stories, with more than 7 in 10 saying it is best for news and current affairs and over 6 in 10 politics, documentaries, and impartial news reporting
- The majority of listeners describe its news and current affairs coverage as in-depth and trustworthy
- The majority also believe Radio 4 provides stimulating discussion, raises awareness of social issues and has high professional standards
- 1 in 3 think it has the capacity to surprise.

How much would listeners miss Radio 4 if it closed down tomorrow and how important is it in their everyday lives?

96% of Radio 4 listeners would miss Radio 4 if it closed down tomorrow (84% would miss it a lot) and 93% consider it important in their everyday lives, with over half saying it was very important.

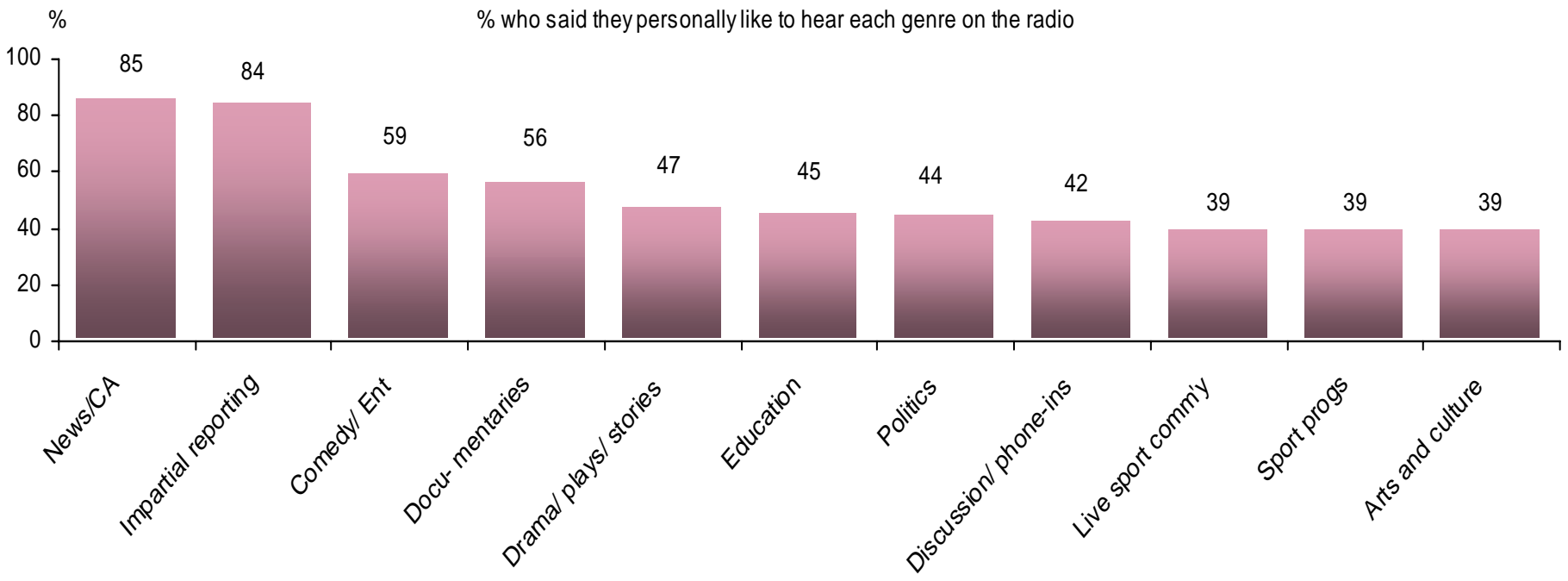


Data based on Radio 4 listeners

Source: Quest/Ipsos/RSL Week 22 2004

Top 10 speech genres amongst over-45s

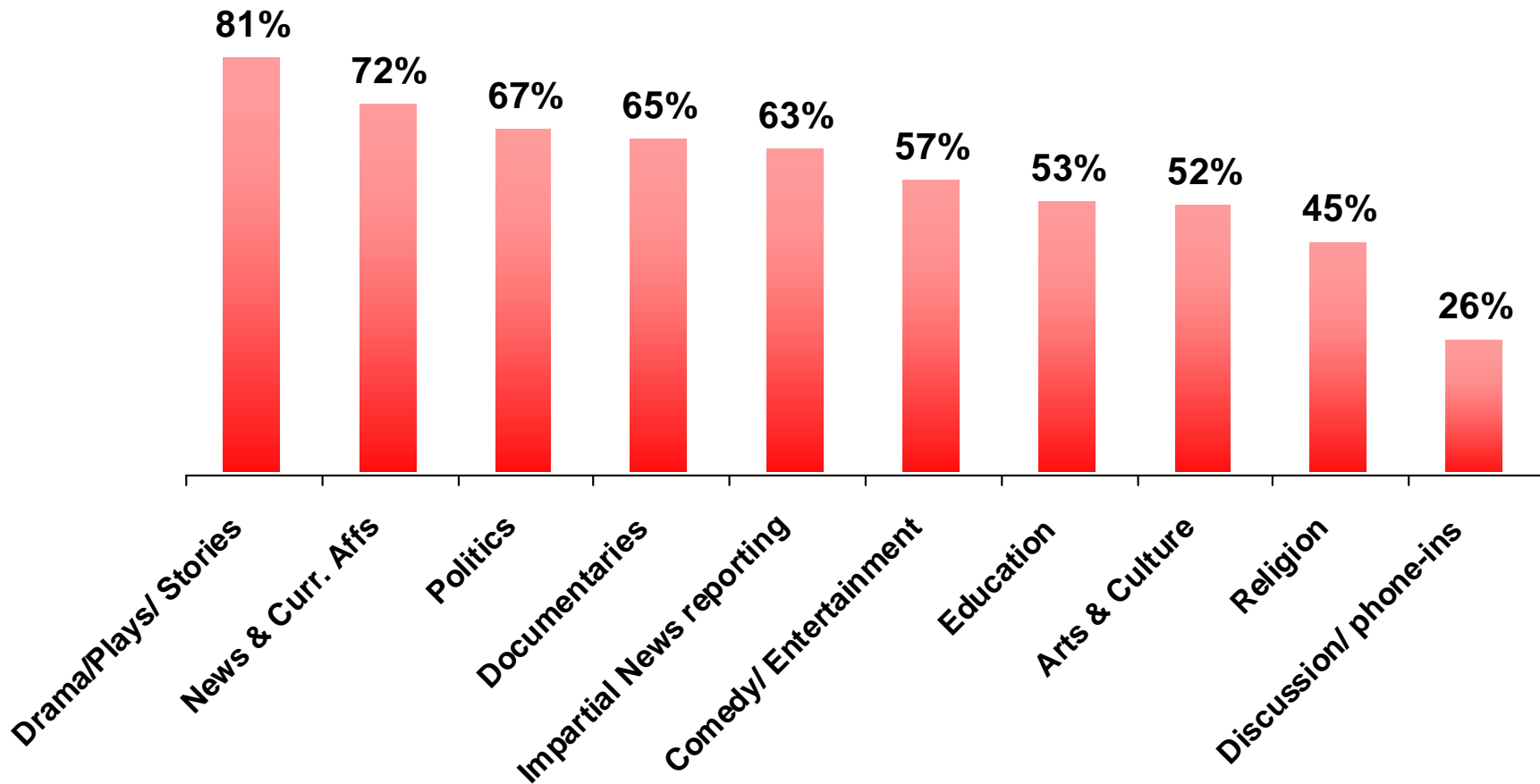
News and current affairs, and specifically impartial news reporting, are extremely important to the over 45s. More than half also had an appetite for Comedy/entertainment and documentaries, with other speech-led genres featuring strongly too.



Source: Quest/Ipsos/RSL Week 22 2004

Top 10 types of programme that Radio 4 are thought to be particularly good at:

81% of Radio 4 listeners thought Radio 4 was particularly good at drama and over 70% said the station was particularly good at news and current affairs programmes. The station was also perceived to do well at a wide variety of speech genres from politics to comedy and religion.

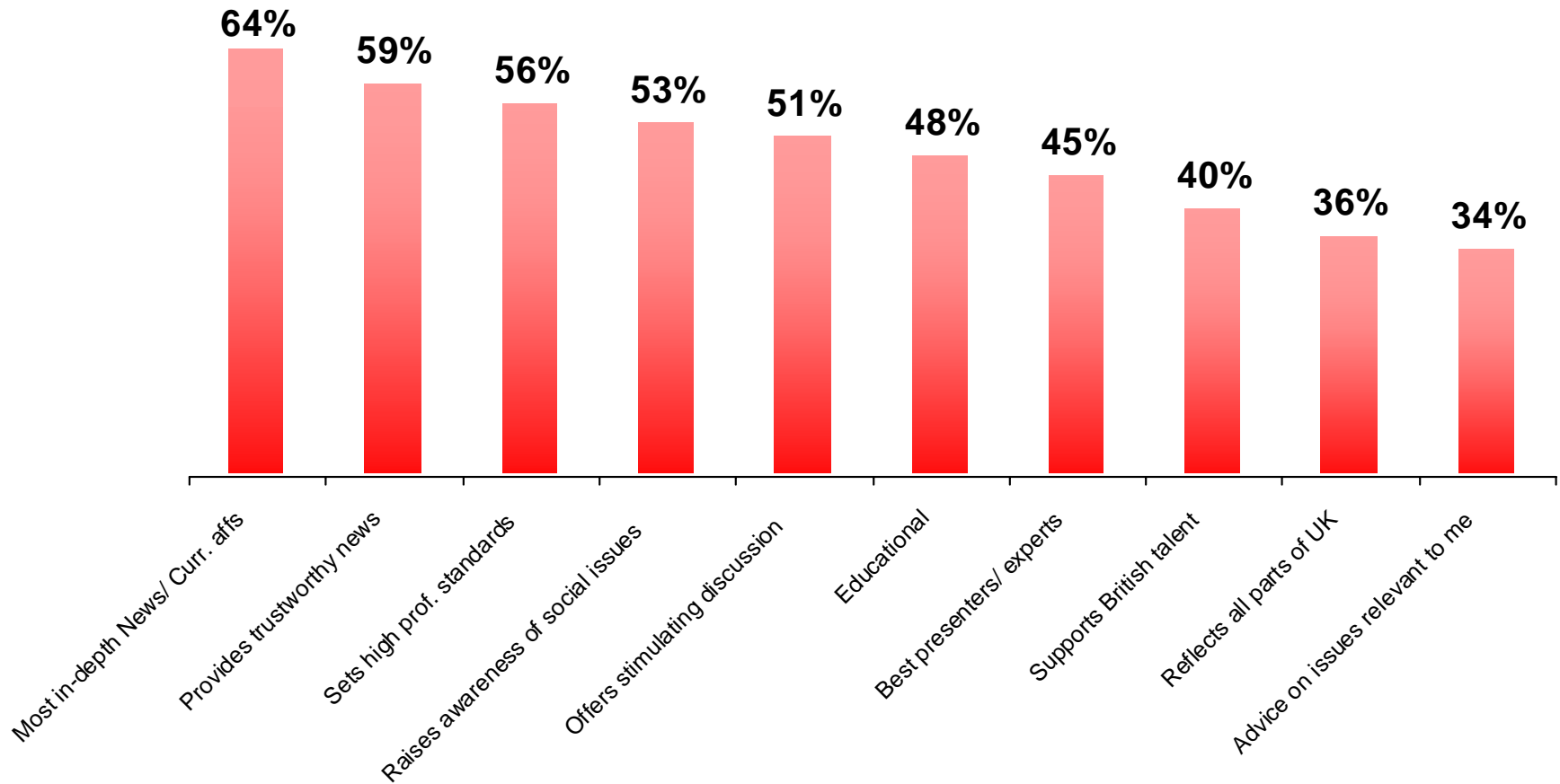


Data based on Radio 4 listeners

Source: Quest/Ipsos/RSL Week 22 2004

Top 10 Statements that Radio 4 listeners use to best describe Radio 4

The majority of Radio 4 listeners describe Radio 4 as carrying the most in-depth news and current affairs, providing trustworthy news, setting high professional standards, raising awareness of social issues and offering stimulating discussion.



Data based on Radio 4 listeners

Source: Quest/Ipsos/RSL Week 22 2004

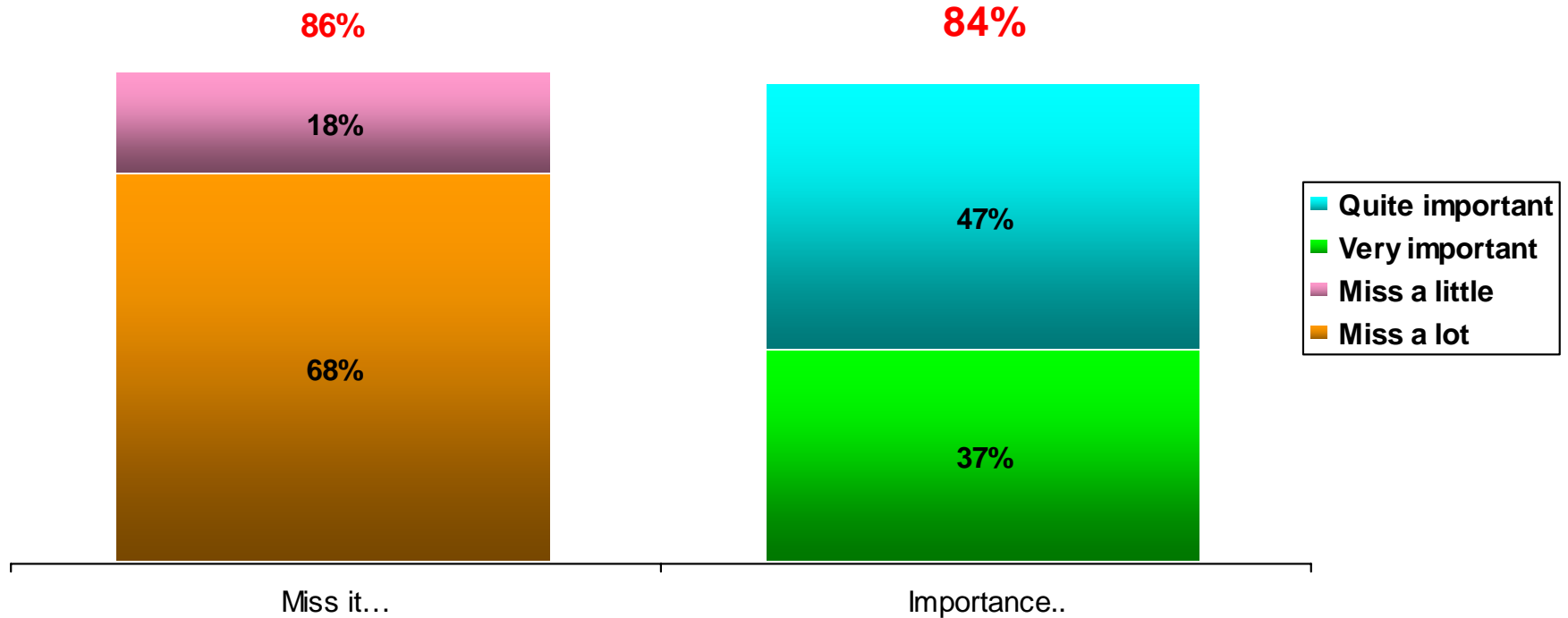
Alternatives to Radio 4:

- Q. *If Radio 4 closed down tomorrow, is there a similar station that you would listen to that has similar types of music/programmes? If yes, what is it?***
- 1 in 7 (14%) of listeners thought there was at least one alternative they'd tune to.
 - BBC stations dominated the list, mostly the national networks such as Five Live and Radio 2, but also a large number of local/national stations such as Radio Wales, Scotland and Cornwall
 - Very few commercial stations were named. Apart from Classic FM, only talkSPORT and LBC had more than one mention.
 - Most popular individual stations mentioned:-
 - Five Live (33 mentions)
 - Radio 2
 - World Service
 - Classic FM
 - Radio 3
 - BBC7
 - Radio Scotland

- Five Live has a strong bond with its listeners: 2 in 3 say they would miss it a lot if it closed down tomorrow and a substantial majority regard it as being very important in their everyday lives.
- It is for sports output that Five Live is rated most highly. Over 7 in 10 of those who have ever listened to the station consider it particularly good for live sports commentary, significantly more than for talkSPORT.
- However, Five Live also scores well for important elements such as news and current affairs and is best described as offering stimulating discussion and trustworthy news reporting, particularly amongst its male and younger target groups.
- Almost a third feel it is good for discussions/phone-ins, however generally talkSPORT fares better on this area and other elements of interactivity.
- 1 in 8 listeners think Five Live understands their generation, equal across the 25-54 age range.

How much would listeners miss Radio Five Live if it closed down tomorrow and how important is it in their everyday lives?

86% of Five Live listeners say they would miss Five Live if it closed down tomorrow and 84% of Five Live listeners say Five Live is important in their everyday lives.

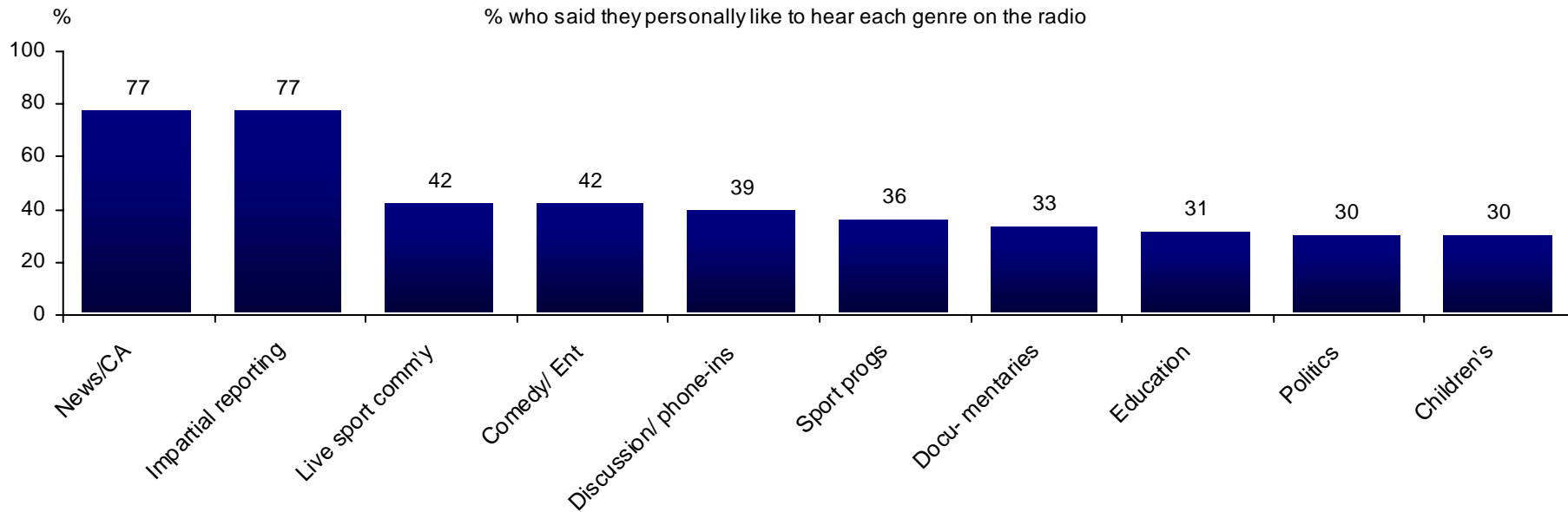


Data based on weekly listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Top 10 speech programmes 25-44 year olds like to hear on the radio

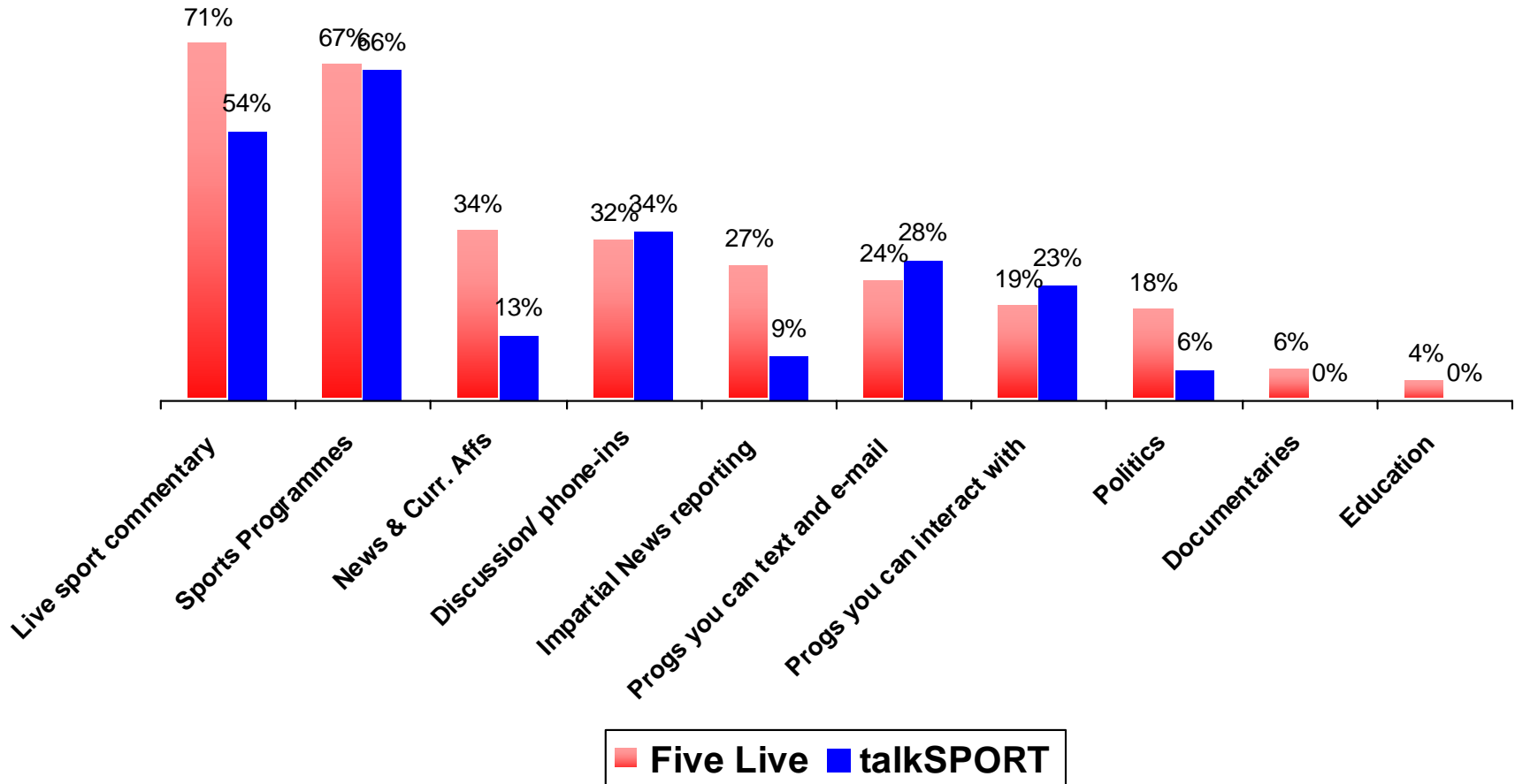
News & current affairs, and specifically impartial news reporting, were the top non-music programme genres that 25-44 year olds personally like to hear on the radio. Live sport commentaries and comedy/entertainment were also cited by more than 2 in 5 people. Children's output, political and educational programmes were of less interest but still featured in the Top 10.



Source: Quest/Ipsos/RSL Week 22 2004

Top 10 types of programme that Five Live are thought to be particularly good at

71% of Radio Five Live listeners thought the station was particularly good at live sport commentary, with a further 67% praising other sports programmes. This compares to 54% and 66% of talkSPORT listeners who thought their station was particularly good at live commentary and sports programming. Around a third said Five Live was particularly good at news and current affairs. Around a third said Five Live was particularly good at news and current affairs. Around a third said Five Live was particularly good at news and current affairs.

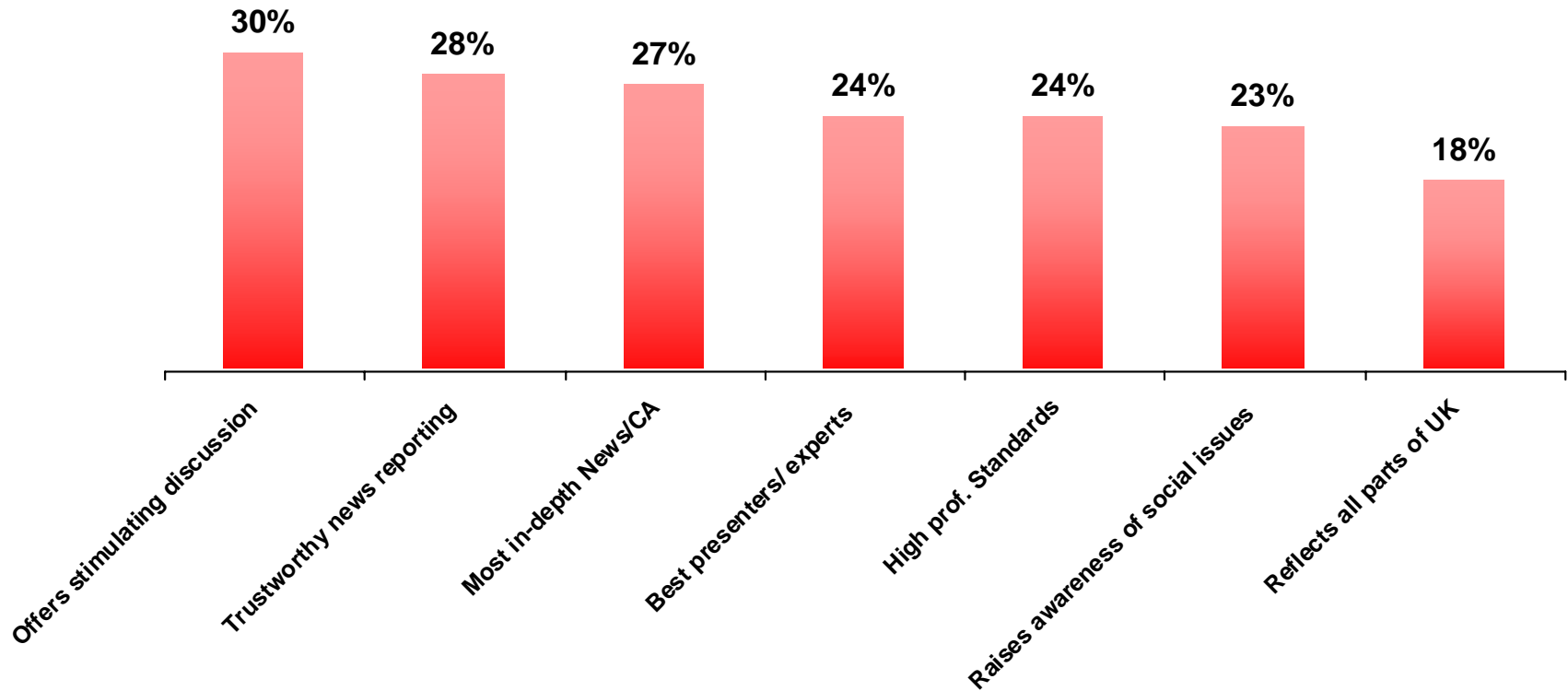


Data based on listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Statements that Five Live listeners use to best describe Five Live

Five Live was best described by its listeners as offering stimulating discussion, trustworthy news reporting and more in-depth news and current affairs.



Data based on Five Live listeners

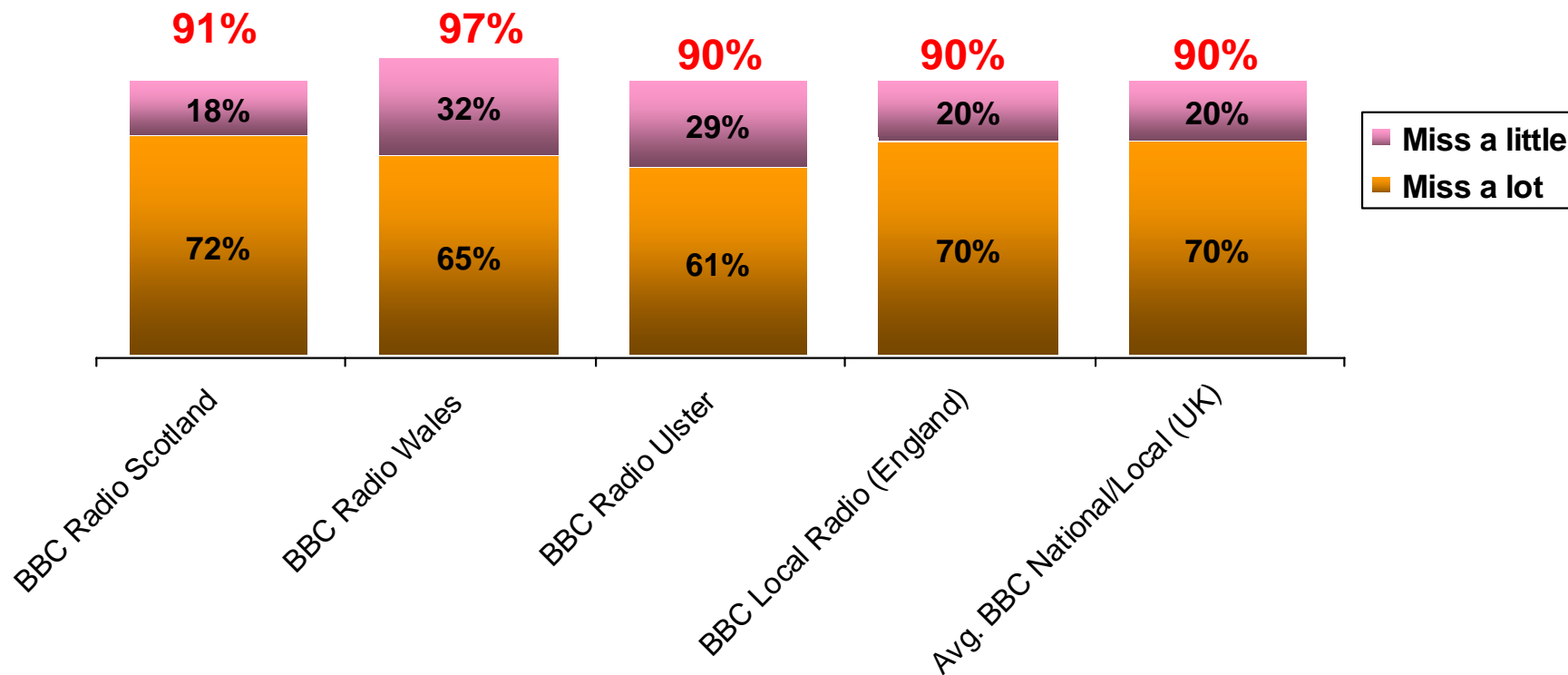
Source: Quest/Ipsos/RSL Week 22 2004

Alternatives to Radio Five Live:

- Q. *If Radio Five Live was closed down tomorrow, is there a similar station that you would listen to that has similar types of music/programmes? If yes, what is it?***
- 22% of listeners thought there was at least one alternative they'd tune to, half of which named talkSPORT, or some variant of the name.
 - Other individual stations mentioned:-
 - Radio 4 (37 mentions)
 - Radio 2
 - Radio Wales
 - LBC
 - Radio Scotland
 - Radio 3
 - Classic FM

How much would listeners miss their BBC Local/National station if it closed down tomorrow?

90% of listeners to the BBC's national and local stations would miss them if they closed down tomorrow – 70% would miss their station a lot.

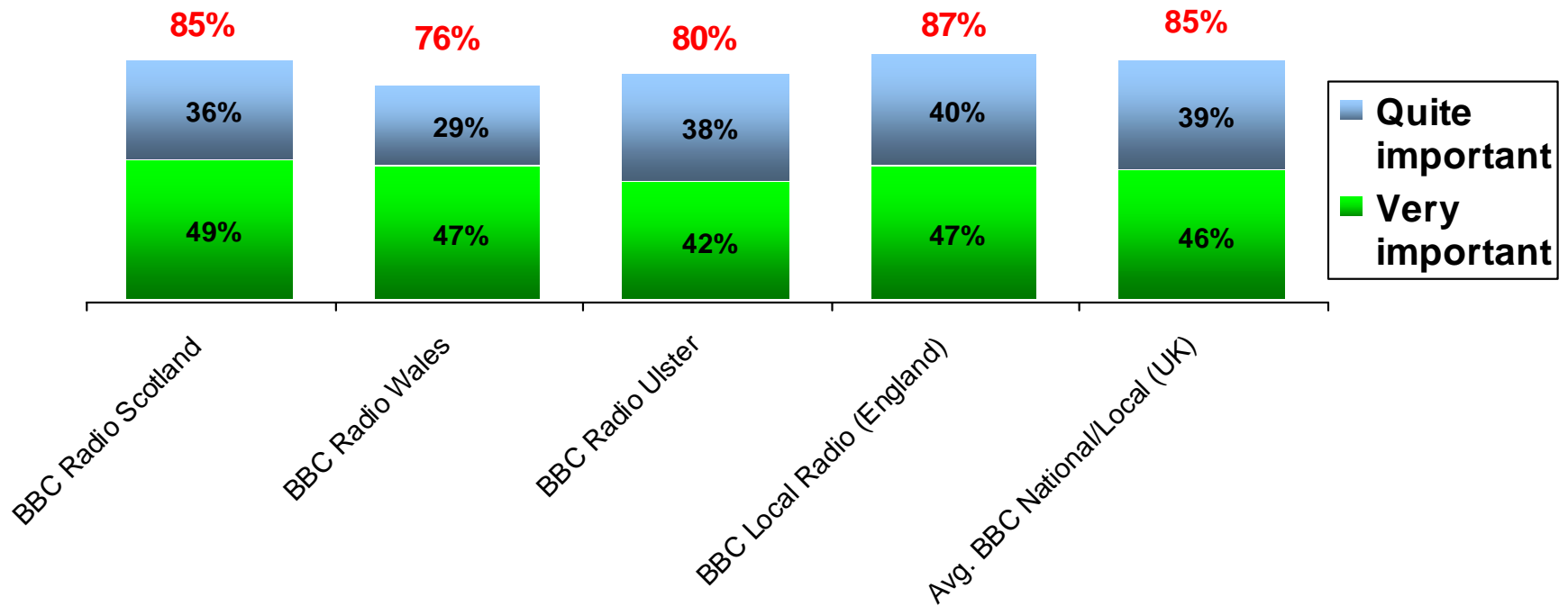


Data based on weekly listeners to each station
(results in nations based on fewer than 50 respondents)

Source: Quest/Ipsos/RSL Week 22 2004

How important are the stations they listen to in their everyday lives? BBC National/Local stations vs Local commercial stations, by nation

For 85% of listeners to the BBC's national and local stations in the UK, their respective station is important in their everyday lives.

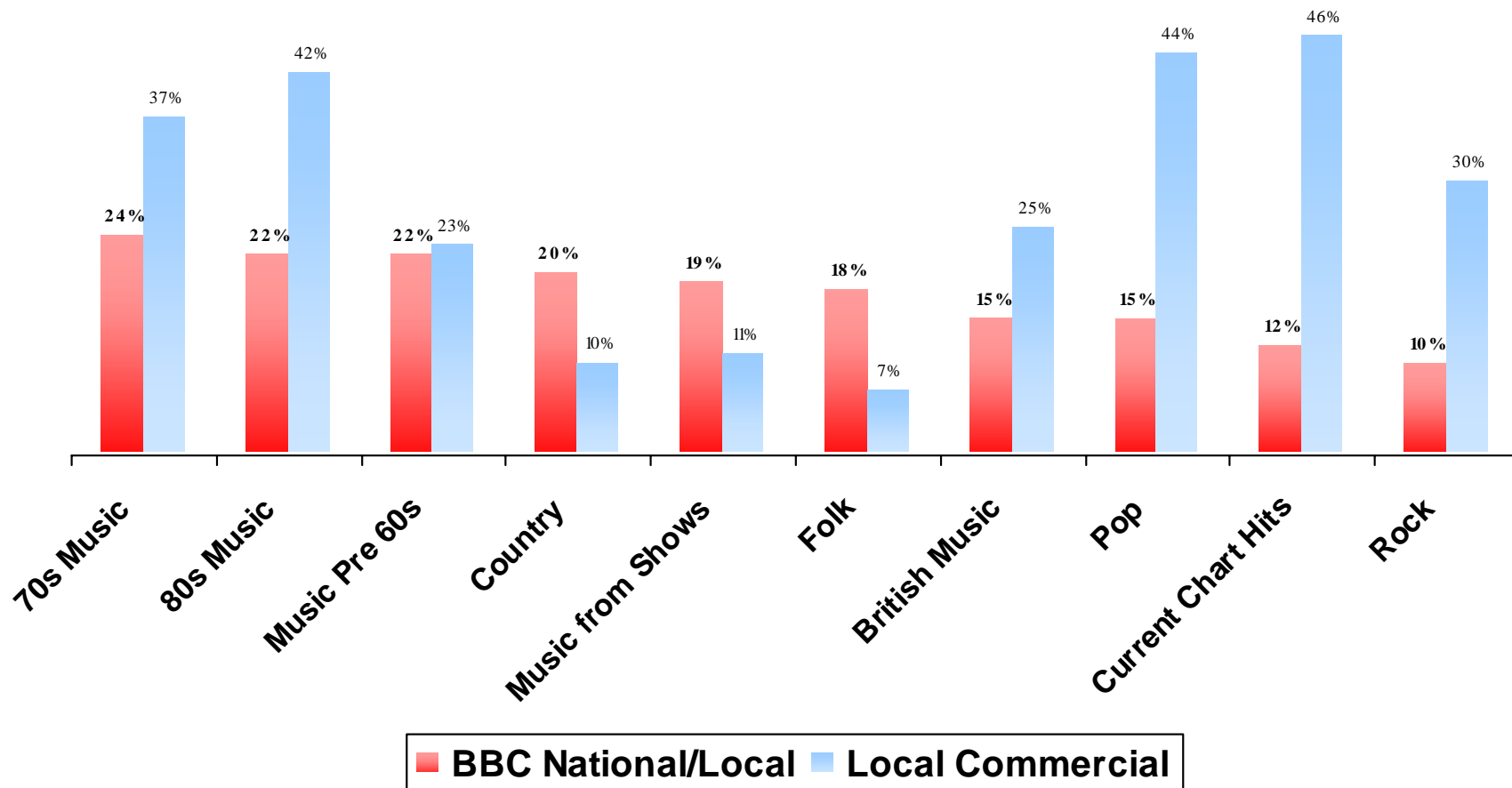


Data based on weekly listeners to each station
(results in nations based on fewer than 50 respondents)

Source: Quest/Ipsos/RSL Week 22 2004

Top 10 types of music that BBC National/Local Radio is particularly good at

The BBC's national/local stations are predominantly speech stations, whereas local commercial stations are primarily led by mainstream music playlists. This is reflected by the perceived musical strengths of the two sets of stations: local commercial stations are considered particularly good for music from the 70s onwards by their listeners, while BBC national/local stations are perceived by more of their listeners to be particularly good at playing country, folk, and show music.

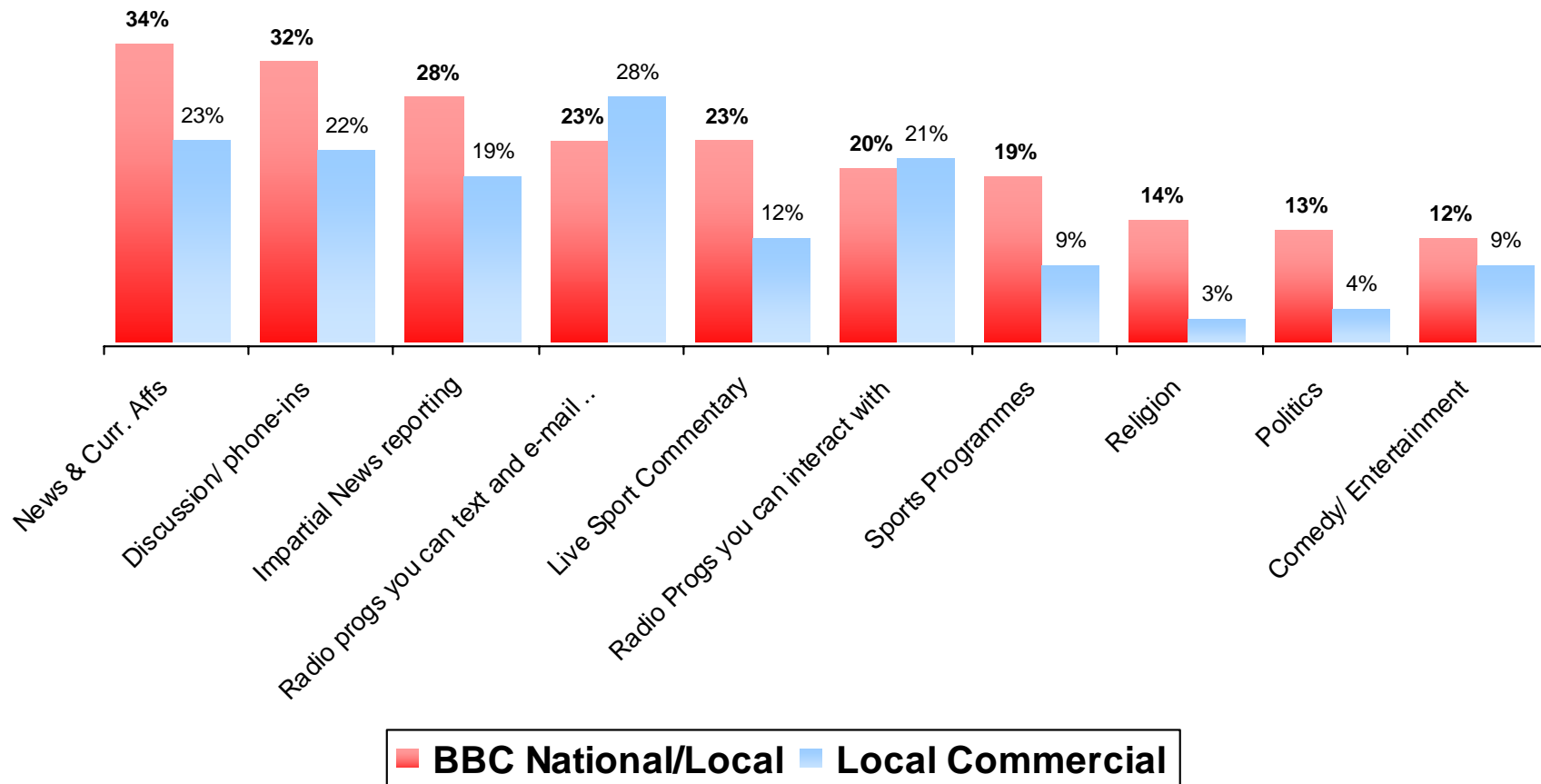


Data based on listeners to each station

Source: Quest/Ipsos/RSL Week 22 2004

Top 10 types of speech programme that BBC National/Local stations are thought to be particularly good at:

The BBC's national/local stations are also thought to be particularly good at a wide range of speech genres, particularly news and current affairs and discussion/phone in programmes. Local Commercial stations are thought to have the edge on programmes that have some form of interaction.



Data based on National/Local Radio listeners

Source: Quest/Ipsos/RSL Week 22 2004

Top 10 Statements that best describe BBC National/Local stations

Over half of BBC Local/National radio listeners would describe their stations as “reflecting life in their region”. This compares to 20% of commercial radio listeners who think commercial radio stations reflect their region. Around a third feel the stations raise awareness of social issues and provide trustworthy news.

