

# Music Analysis



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# Methodology (1)

Research commissioned by the BBC was conducted by Intelligent Media to monitor the music output of Radio 1 and Radio 2 and some key commercial stations.

## Monitoring Period

The period of recordings analysed ran from 0600 on Saturday May 8 through to 0600 Saturday May 15, 2004.

## Analysis Reports

These have been provided in two formats:

- The full week (168 hours per station)

- The key weekday daytime hours – Monday-Friday 0600-1900 (65 hours per station)

## Music Identification

This is conducted by a team of researchers who listen through every minute of the recordings for the stations in the survey. The start time for a song is logged from the second all speech stops and the end time is logged from the second speech starts again. Therefore the period of a record when a DJ is talking over the top of it is not counted towards the duration of that play.

Unfortunately, it is not possible to identify every single track played. Examples of this would be where there is Live DJ Mix programme where the DJ is mixing a large number of songs and samples of songs together. A large number of these tracks are normally brand new and unreleased and the DJs on these types of programme tend not to announce the artist and title detail for all or any of the songs they are playing.

Live DJ Mixes and unidentified songs are not included in the calculations relating to the analysis for Era, Genre, UK/non-UK, New/Old.

## Methodology (2)

### Radio 1 is measured against:-

*Capital FM* (London) – popular contemporary music station also playing classic hits aimed at 15-44 year olds

*Beat 106* (Central Scotland) - play fresh and innovative music aimed at 15-39 year olds

*Galaxy 105-106* (Newcastle) – Dance & RnB station aimed at 15-34 year olds.

*Key 103 FM* (Manchester) – Contemporary pop station aimed at 15-34 year olds

*Kiss 100 FM* (London) – Dance station aimed at 15-25 year olds

*Leicester Sound* – Contemporary pop station aimed at 15-44 year olds

*96.4The Wave* (Swansea) – Contemporary and classic hits, with strong commitment to local news and info aimed at 15-44s

*Virgin FM* (London) – Rock and contemporary music station aimed at 20-44 year olds

*XFM* (London) – Specialist alternative rock station aimed at 15-34 year olds

### Radio 2 is measured against:-

*Capital FM* (London) - popular contemporary music station also playing classic hits aimed at 15-44 year olds

*Heart 106.2* (London) – Adult contemporary pop station aimed at 25-44 year olds

*Leicester Sound* - Contemporary pop station aimed at 15-44 year olds

*Real Radio* (Glasgow) – Personality radio, music and speech for central Scotland aimed at 25-54s

*Saga 105.7* (Birmingham) – Easy melodic music station mixed with news and lifestyle orientated speech aimed at the 50s and over

*Virgin FM* (London) - Rock and contemporary music station aimed at 20-44 year olds

## Radio 1 & Radio 2 crossover

Radio 1 and Radio 2 are important to the BBC Radio portfolio of national analogue stations because of their unique music offerings.

The music output provided on each network is distinctive and the independent research carried out by Intelligent Media has found that there is very little crossover between the two networks.

Crossover analysis:-

- Total number of individual titles played on Radio 1 and Radio 2 for the sampled week was 2,259.
- The number of titles played on both Radio 1 and Radio 2 was 50 (2.2%)
- Most of these were played mainly by one station, and only once or twice by the other.
- Number of titles played more than five times by both R1 and R2 was 4 (0.2%)

# Glossary of definitions

- **Full Week** – the full survey period 06:00 Saturday May 8<sup>th</sup> to 06:00 Saturday May 15<sup>th</sup>
- **Daytime** – 06:00 Monday May 10<sup>th</sup> to 19:00 Friday May 14<sup>th</sup>
- **New songs** – Pre release or within one month of release. This time period was chosen to give an indication of support for tracks in their earliest days. Many stations feature songs on their playlists that are two or three months old, but tracks in this stage of life are better described as “recent hits” rather than “new”.
- **Repetition ratio** - the average number of plays, per song, per week (calculated by dividing total plays by total songs). Specialist programmes playing more songs, less often, affect this figure, as do the number of old tracks, as they are usually rotated less often.
- **Unique songs** - songs played on a station during the survey week and not played on any other sampled station. The “uniqueness” figure for stations compared to both Radio 1 and Radio 2 will be different in the respective surveys. This is because they are compared against the competitors in that competitor set only.
- **Era** – the release year of a track
- **Genre** - Genre coding was based on definitions used by the BPI (British Phonographic Industry). Tracks were placed in one of twenty genres, coding was consistent whether played on Radio 1, Radio 2, or any competitor station. All sub-genres were collapsed into four overview genres in the Radio 1 charts - Dance, Modern Rock, Urban (including Hip-Hop and RnB) and Pop are shown. Genres primarily appealing to an older audience, e.g. Classic Rock and Soul, are shown in “other”. In the Radio 2 charts the “Rock” total includes Modern, Classic and Adult Orientated Rock.
- **Live music** - Session, acoustic or concert tracks broadcast as live, or specially recorded “as live” for later transmission. Live versions of tracks played from commercially released recordings are not included.

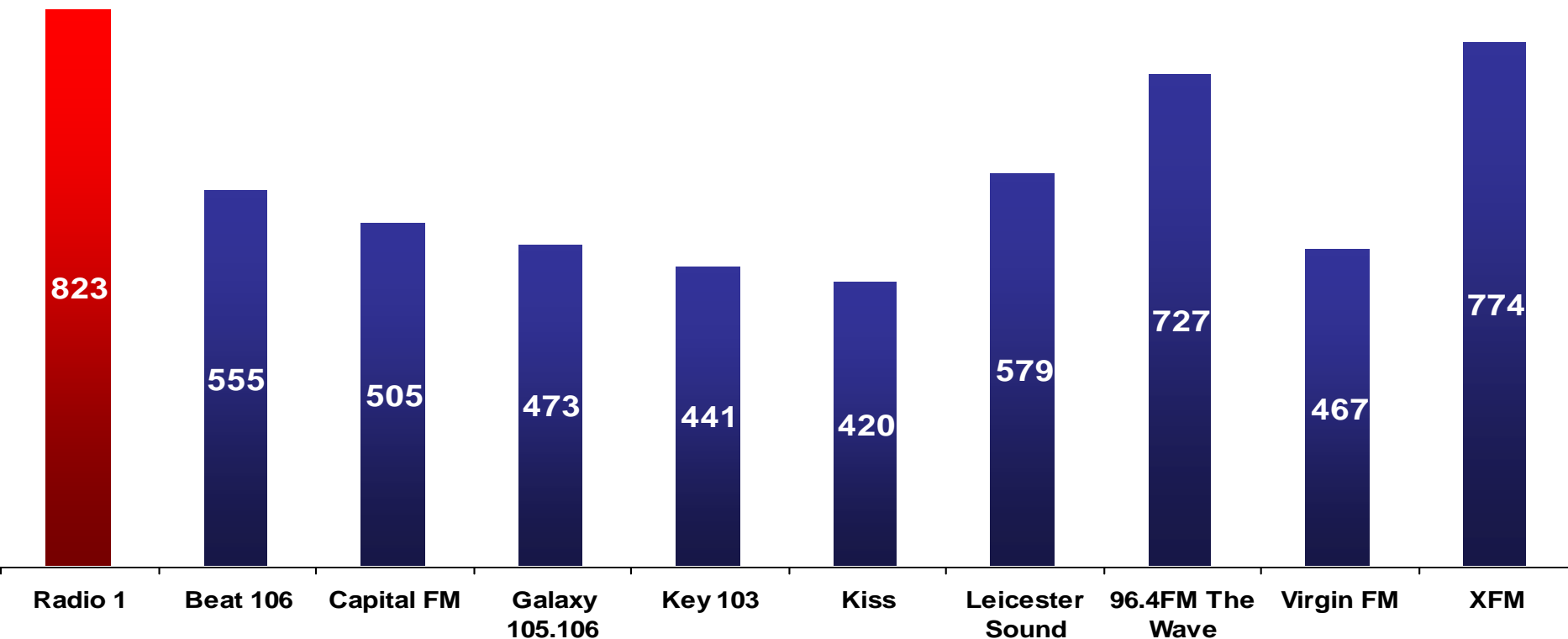


# Radio 1 summary

- Radio 1 aims to introduce new songs, new artists and new styles of music to a young audience. It places specific emphasis on UK acts, and has a clear policy to develop this music through its daytime as well as its specialist shows.
- As part of this, Radio 1 deliberately sets out to help developing artists and consciously tries to give airtime to music which does not yet have commercial backing and with which the audience may be unfamiliar.
- Music is complemented on Radio 1 by a distinctive speech offering, with personality DJ's, news, documentaries and social action output. Radio 1's speech makes up over 30% of total hours broadcast.
- There are over 250 commercial stations in the UK, the majority of whom target Radio 1's young audience either directly or indirectly.
- Of the stations Radio 1 is compared to in this survey, Capital FM, Key 103, Leicester Sound and The Wave are typical of most of the commercial stations aimed at a young audience. Their approach generally is to offer tried and tested hits for a broad age range which includes Radio 1's target audience of 15 to 24 year olds.
- The survey group however is weighted towards the more progressive, youth-orientated and single genre stations which supply a more adventurous musical offering. This is to enable a full comparison of Radio 1 to the alternatives available in the market which may be attractive to potential listeners.
- Radio 1 played more different songs in the week surveyed than all the other sampled stations. The range and diversity of new songs in daytime was far greater, and tracks were repeated less frequently. Support given to new tracks by UK acts was far more significant on Radio 1, and the commitment to "live" music unmatched.
- Only 13% of Radio 1's total music output would have been classed as "pop" by the BPI (British Phonographic Industry), and over half of all the music during the week (and half of all new songs in daytime) was "unique" to Radio 1, and not played on any of the other stations sampled.
- Some stations matched Radio 1 on some measures. Some came close on others. But none brought together the mix of new artists, tracks from across the range of contemporary genres and live music to the extent that Radio 1 did.

## Number of individual songs – full week\*

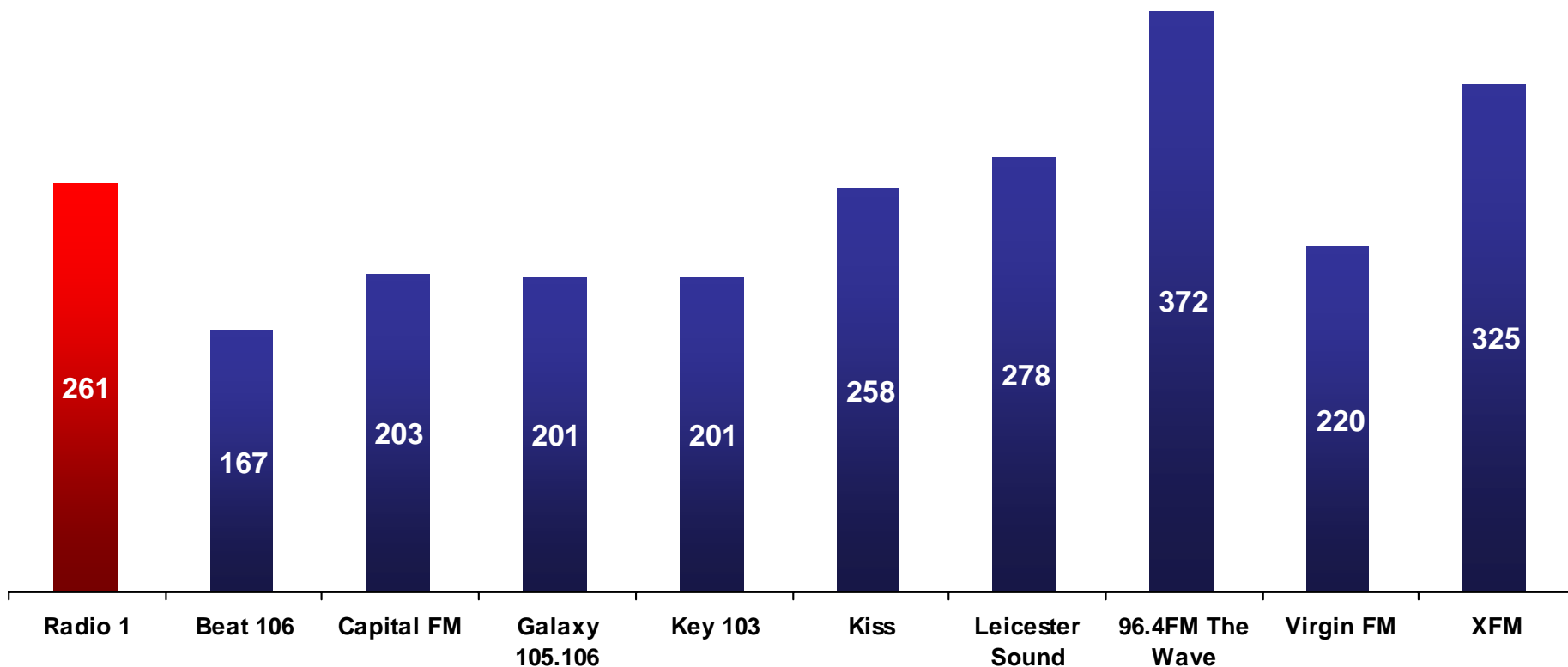
Radio 1 played over 800 songs during the surveyed week – more than any other station. This reflects the range and depth of Radio 1's specialist output.



NB The total number of tracks played per station was fairly consistent (averaging 1922) as each broadcast for the same number of hours, so the number of individual songs is a better indication to the range and depth of music broadcast.

## Number of individual songs – daytime\*

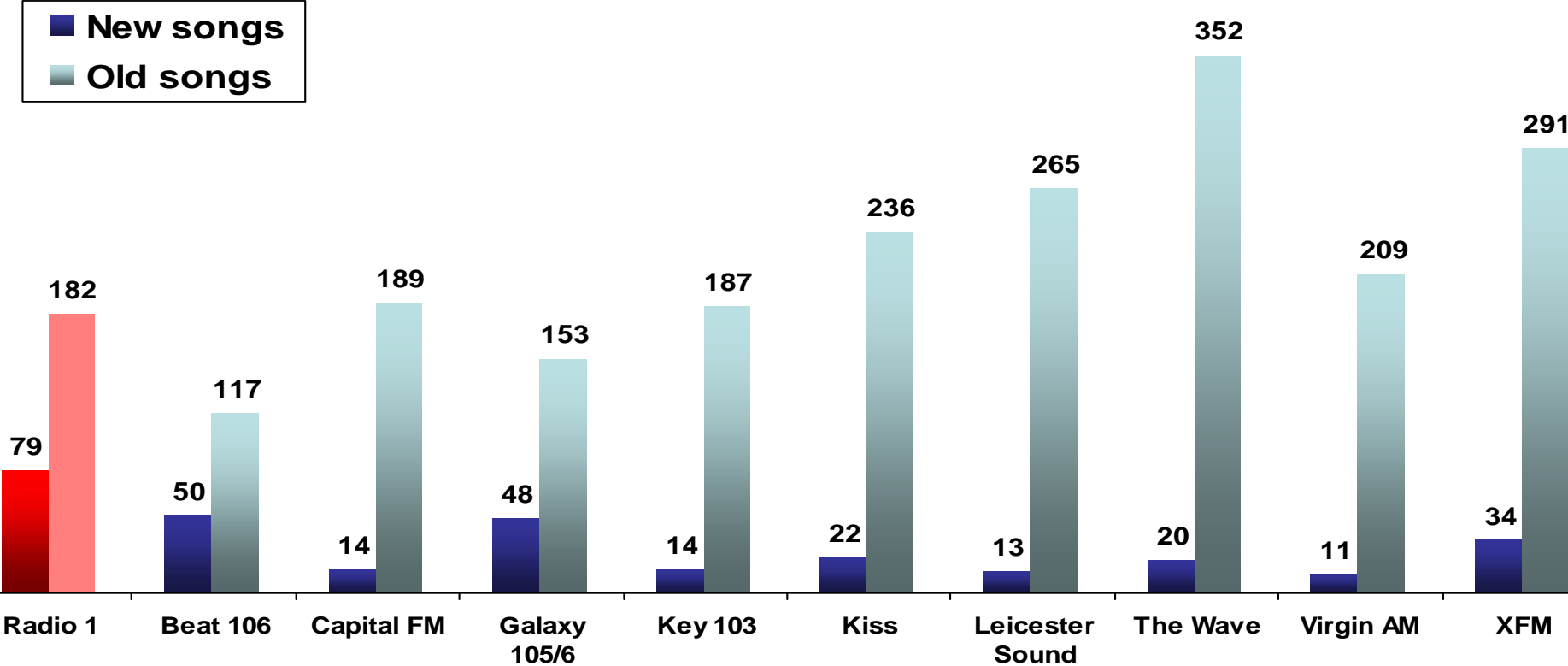
During “daytime” Radio 1 played 261 individual songs. Some stations played a greater number, but these tended to be older tracks (See slide 11).



# Daytime\* music, total songs – new vs old

On Radio 1 30% of the songs featured during daytime were new. This was matched by Beat 106 and 25% of the tracks on Galaxy were new. The figures for the other stations surveyed however were between 5% and 10%.

Number of new and old songs featured in daytime

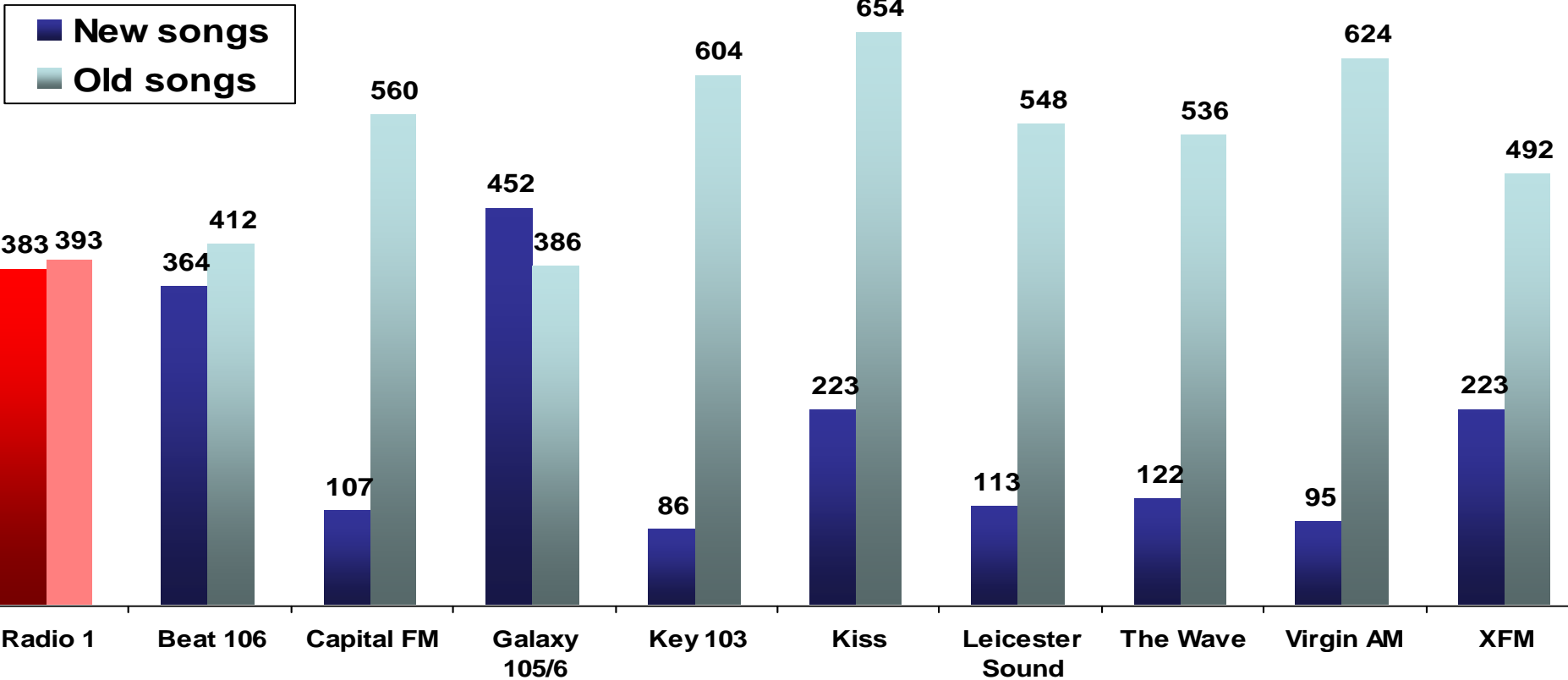


Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 7.00pm Fri. 14<sup>th</sup> May 2004)

# Daytime\* music, total plays – new vs old

Looking at total plays, Radio 1's daytime music was evenly split between new and old music. With the exception of Beat 106 and Galaxy, older music dominated other commercial stations, with half the sampled stations playing fewer than 1 in 5 new tracks.

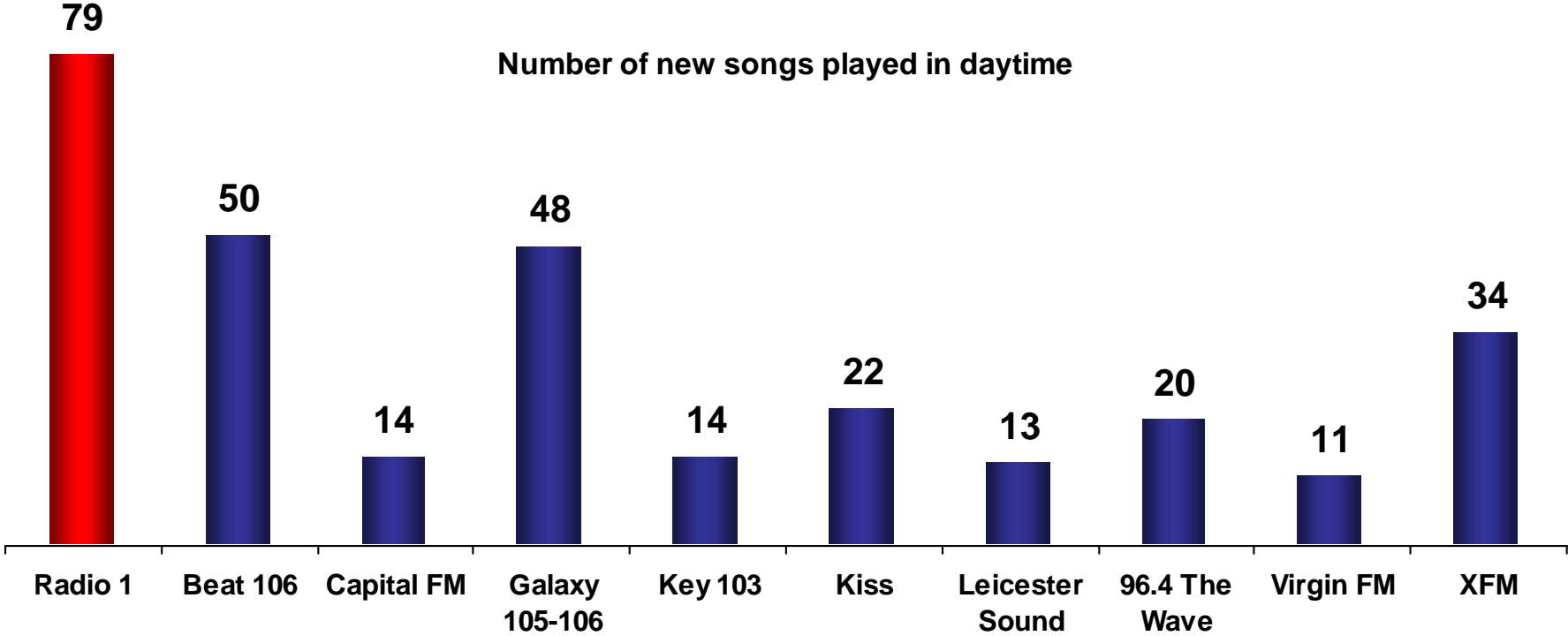
Total plays of new and old songs in daytime



Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 7.00pm Fri. 14<sup>th</sup> May 2004)

# New music in daytime\*

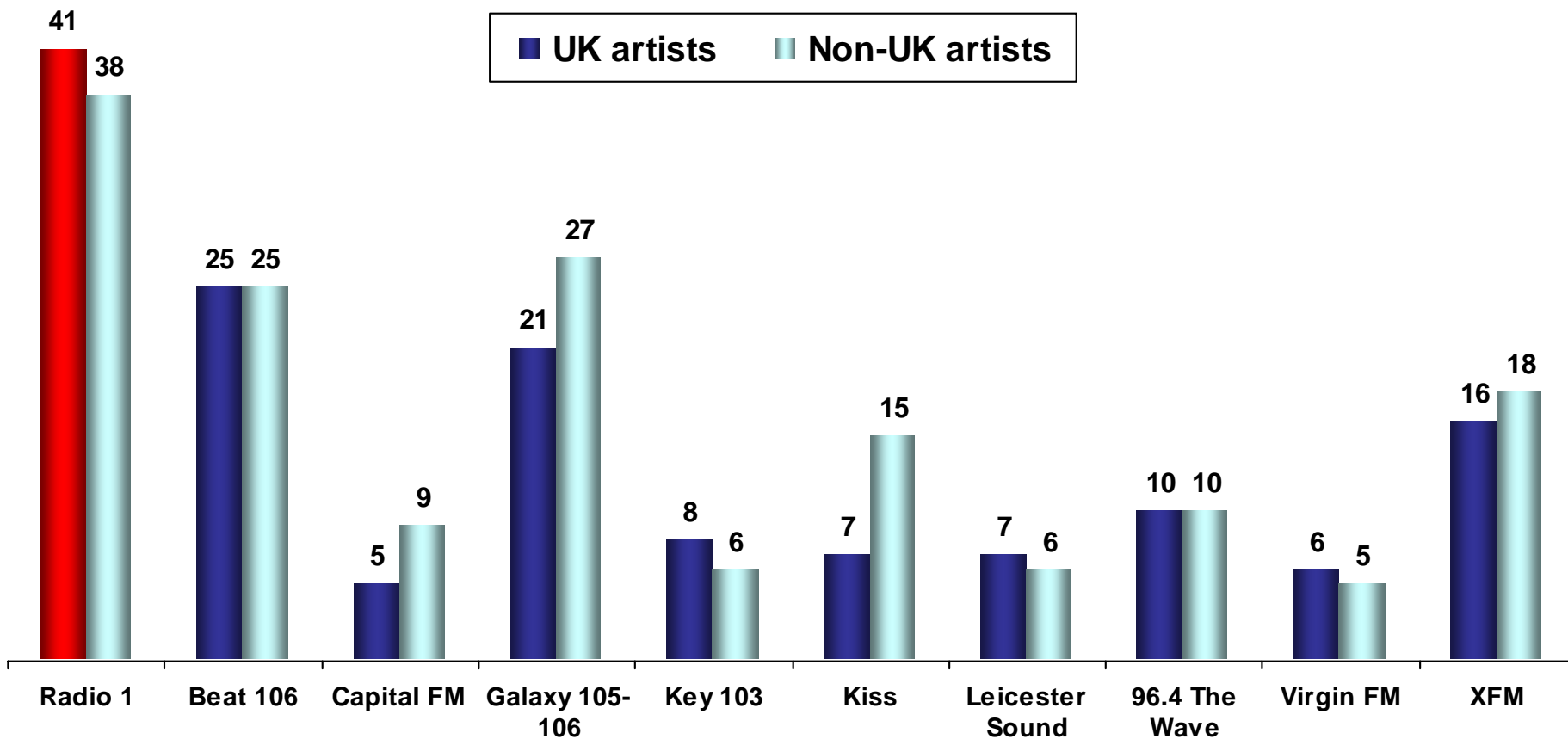
Radio 1 played more new songs in daytime than any other station sampled. Galaxy played more new tracks overall than Radio 1 (see slide 12) in part due to their higher music to speech ratio – they played more music overall and spoke less. However, they featured far fewer individual new songs. Radio 1 played 79 new songs in daytime, 60% more than both Galaxy and Beat, and four times the average for the other stations.



Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 7.00pm Fri. 14<sup>th</sup> May 2004)

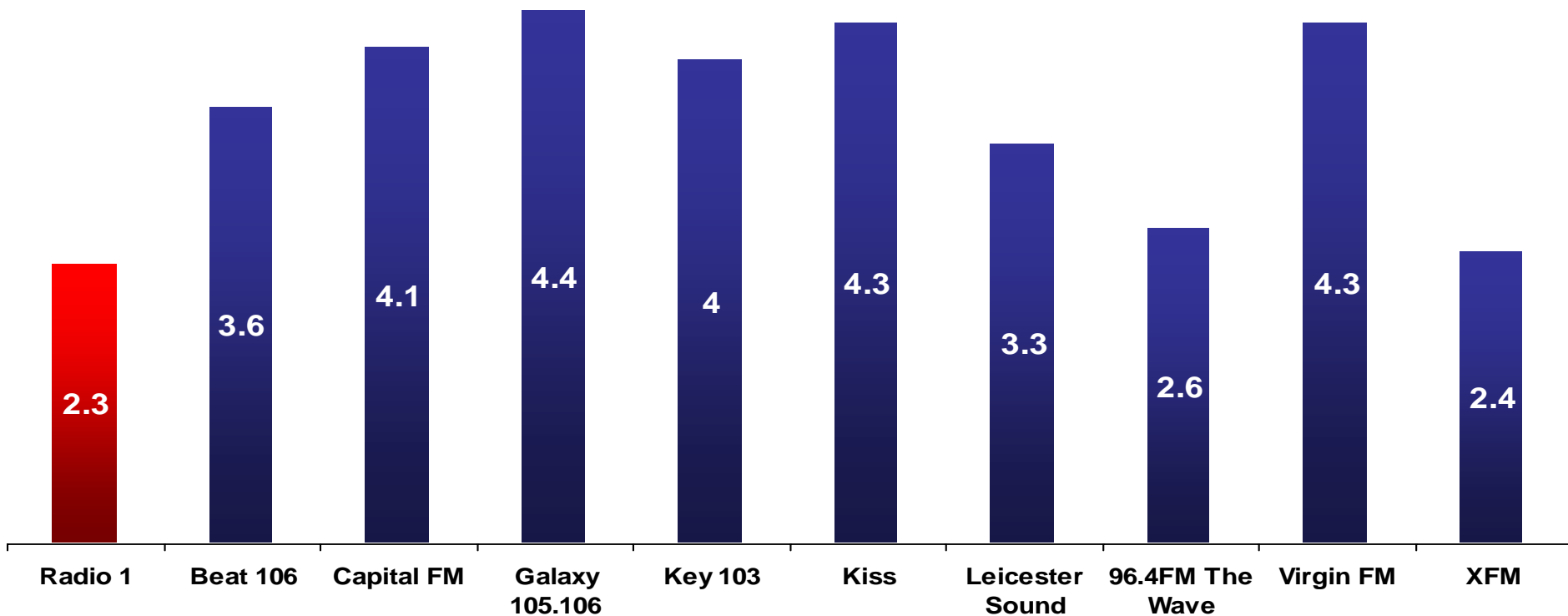
# New music broken down by UK v non-UK artists – daytime\*

Over half of Radio 1's new songs, 41 in total, were by UK artists, again far more than any other station.



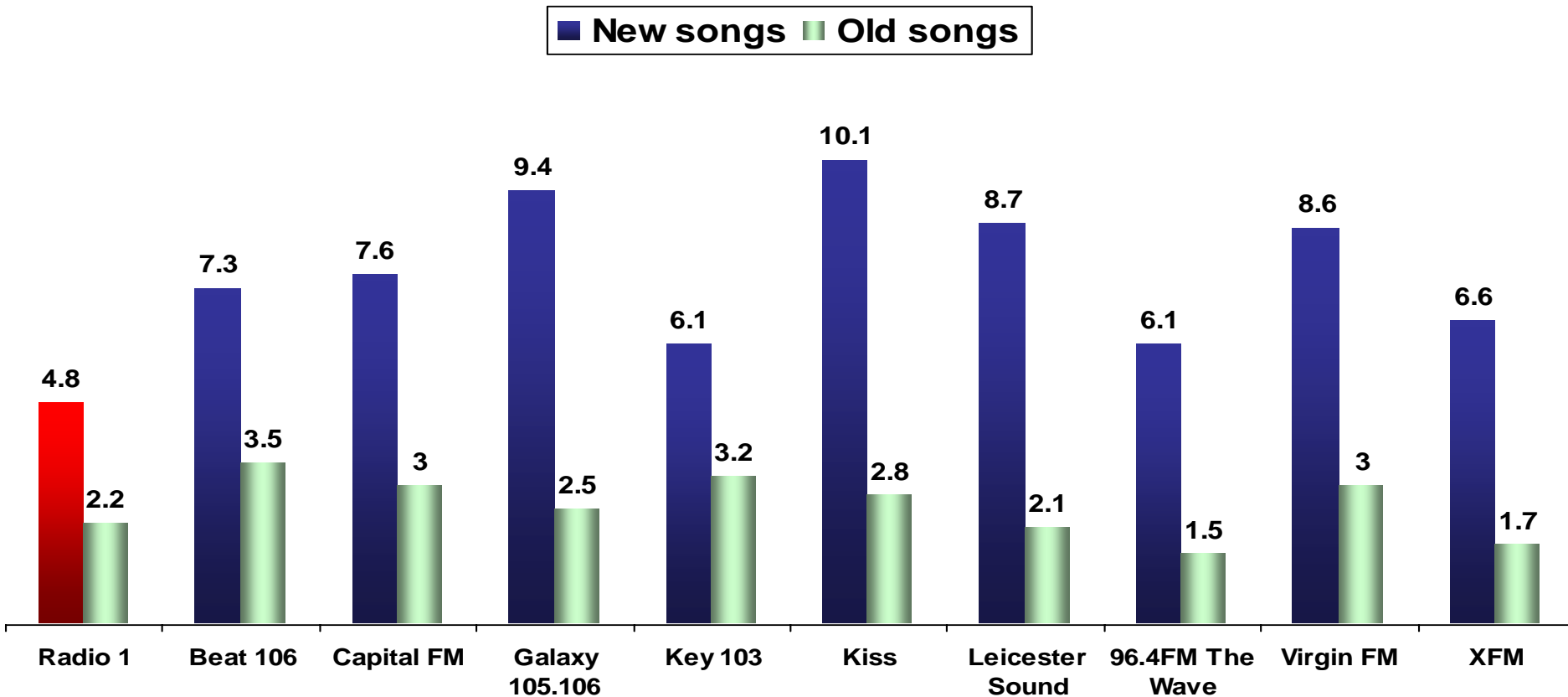
## Repetition ratio - full week\*

The repetition rate of songs on Radio 1 was less than any other station. This figure was low to some degree because of the impact of Radio 1's specialist shows, which played a vast range and number of songs, but which each got only one or two plays.



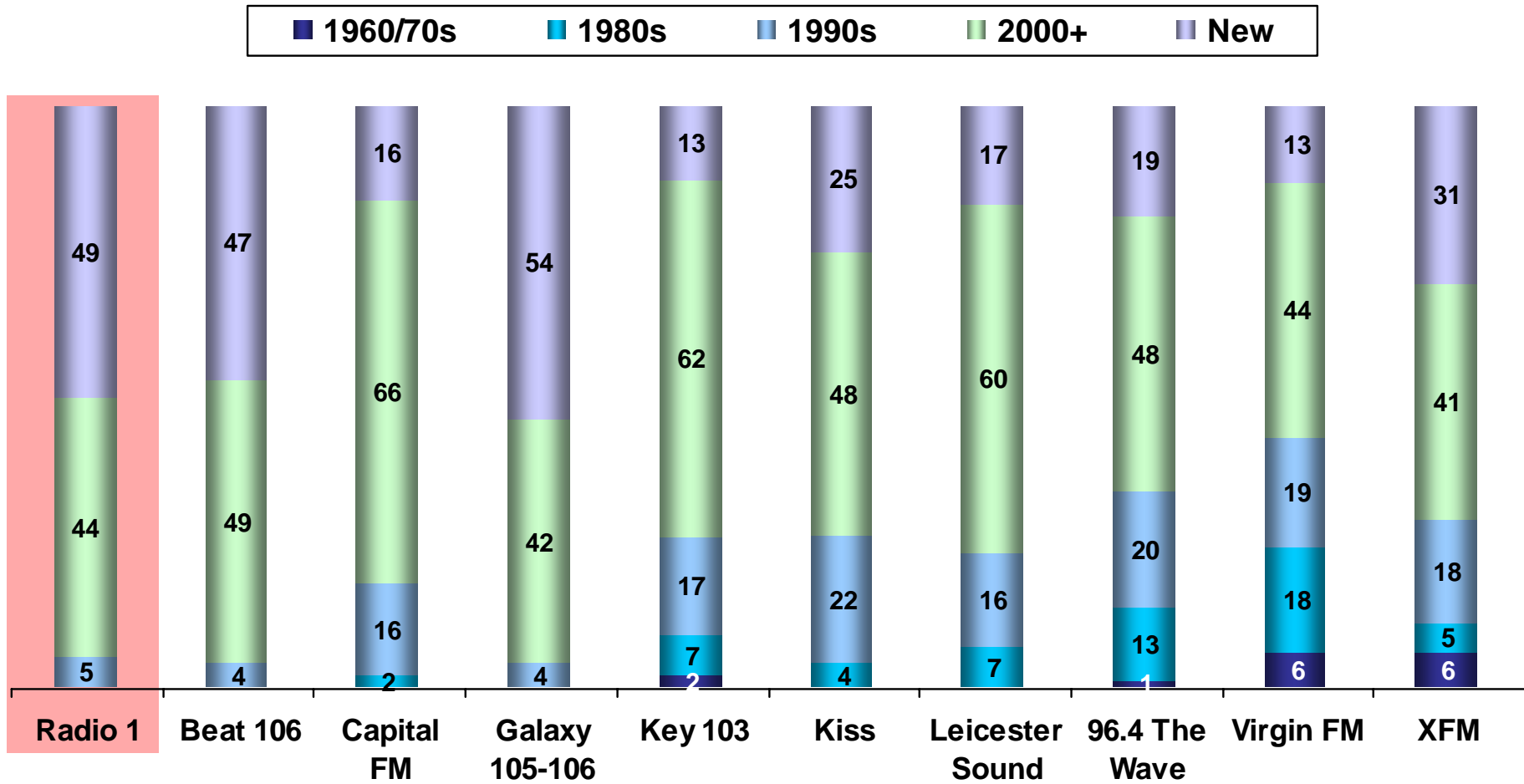
# Repetition ratio – daytime\* split by new and old songs

However, even in daytime, Radio 1's repetition ratio for new songs was the lowest of all the sampled stations. Galaxy and Kiss played their new songs on average around twice as often and all stations rotated new tracks significantly more.



# Music broken down by era – daytime\*

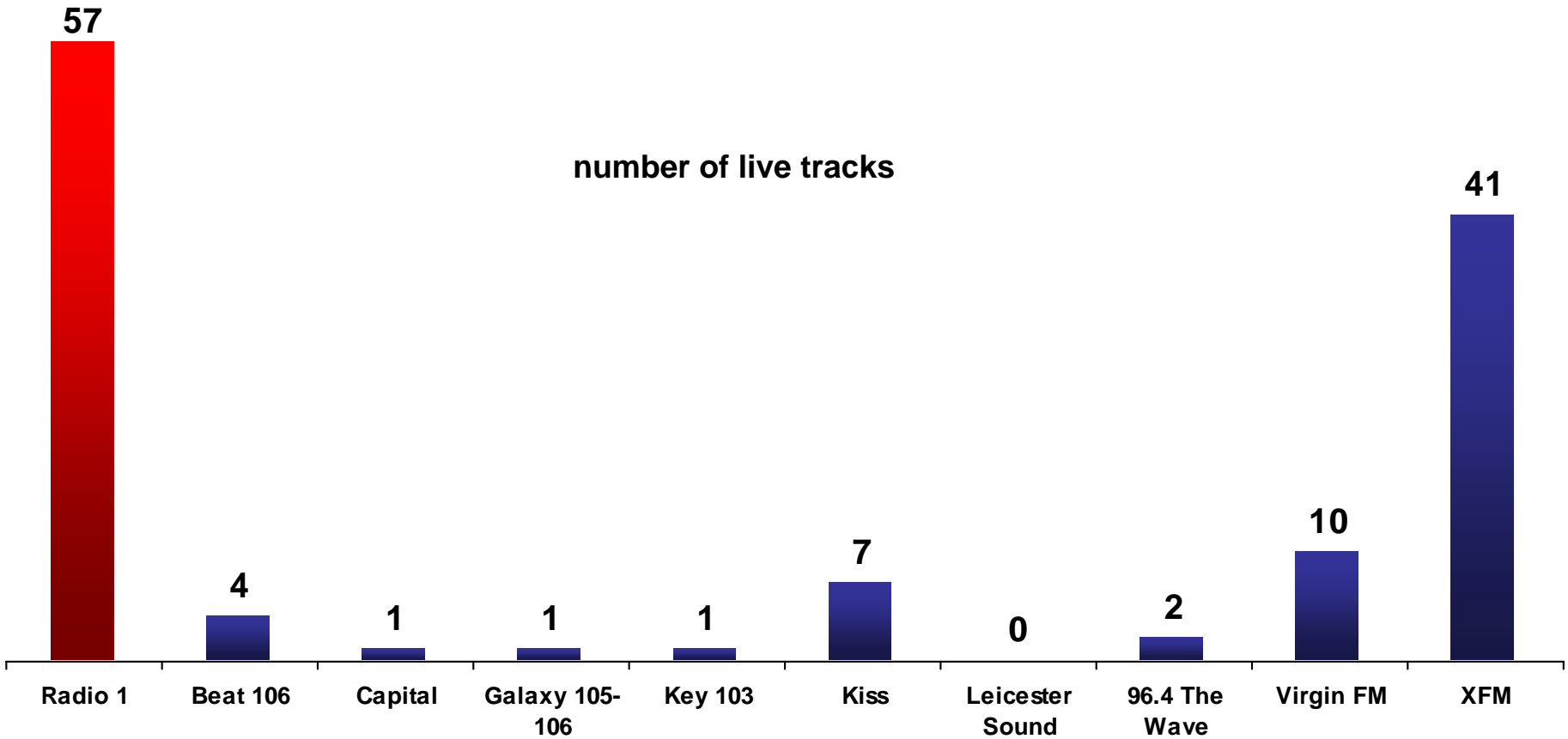
Nearly 50% of Radio 1's daytime music was less than a month old, and 95% came from the last four years. Beat and Galaxy had a similar profile, but other stations relied far more on heritage tracks.



Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 7.00pm Fri. 14<sup>th</sup> May 2004)

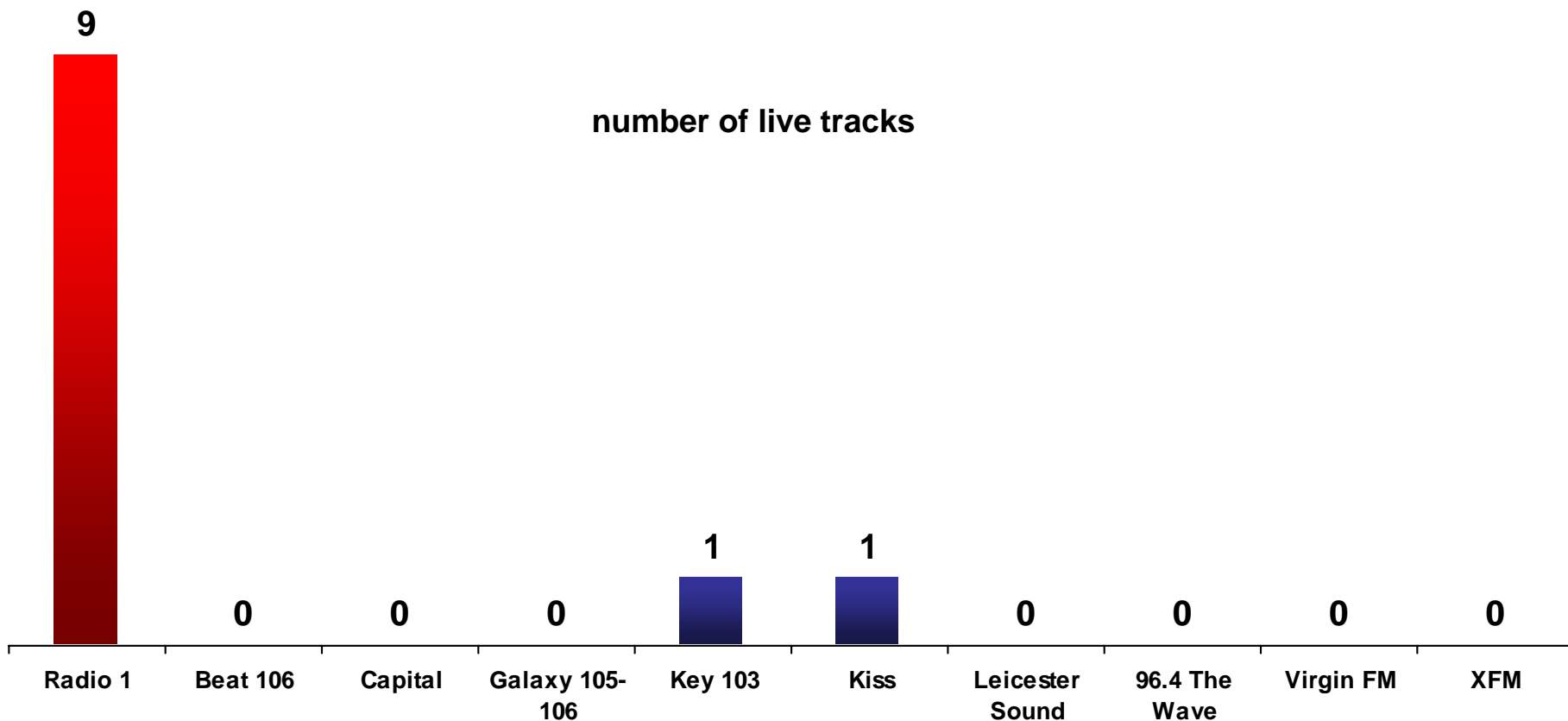
# Live music – full week\*

Radio 1 played almost 60 live tracks during the week. Only XFM came close to matching this figure and the other 8 stations together played less live music than Radio 1.



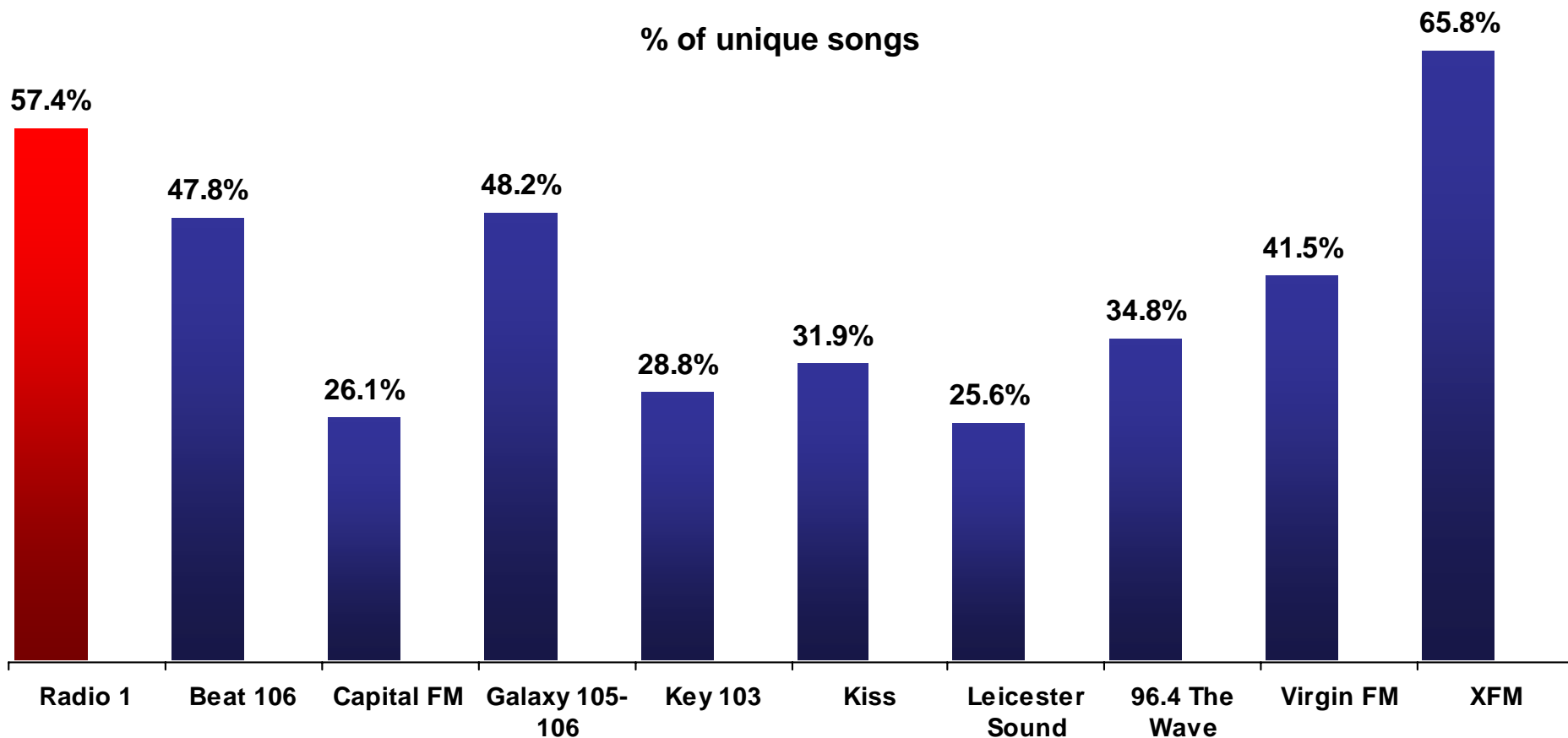
## Live music – daytime\*

1 in 6 of Radio 1's live tracks were played in daytime, but all XFM's live music was played during the evenings or at the weekend. Key 103 and Kiss (1 track each) were the only other stations to play any other live music in daytime.



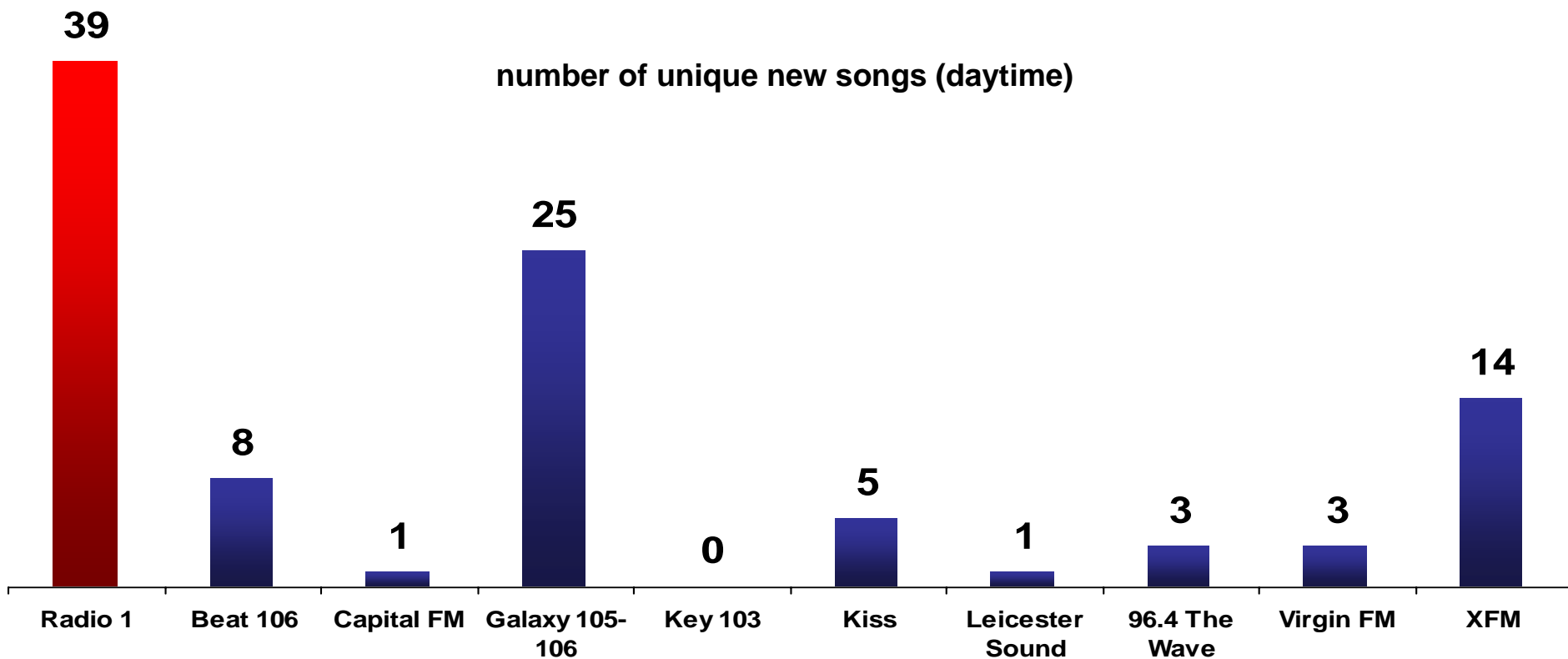
## Unique songs – full week\*

Almost 60% of songs played on Radio 1 during the surveyed week were not played on any other station sampled. Only XFM had a higher percentage of “uniqueness”, primarily due to the number of specialist and older rock tracks they featured (see slide 21).



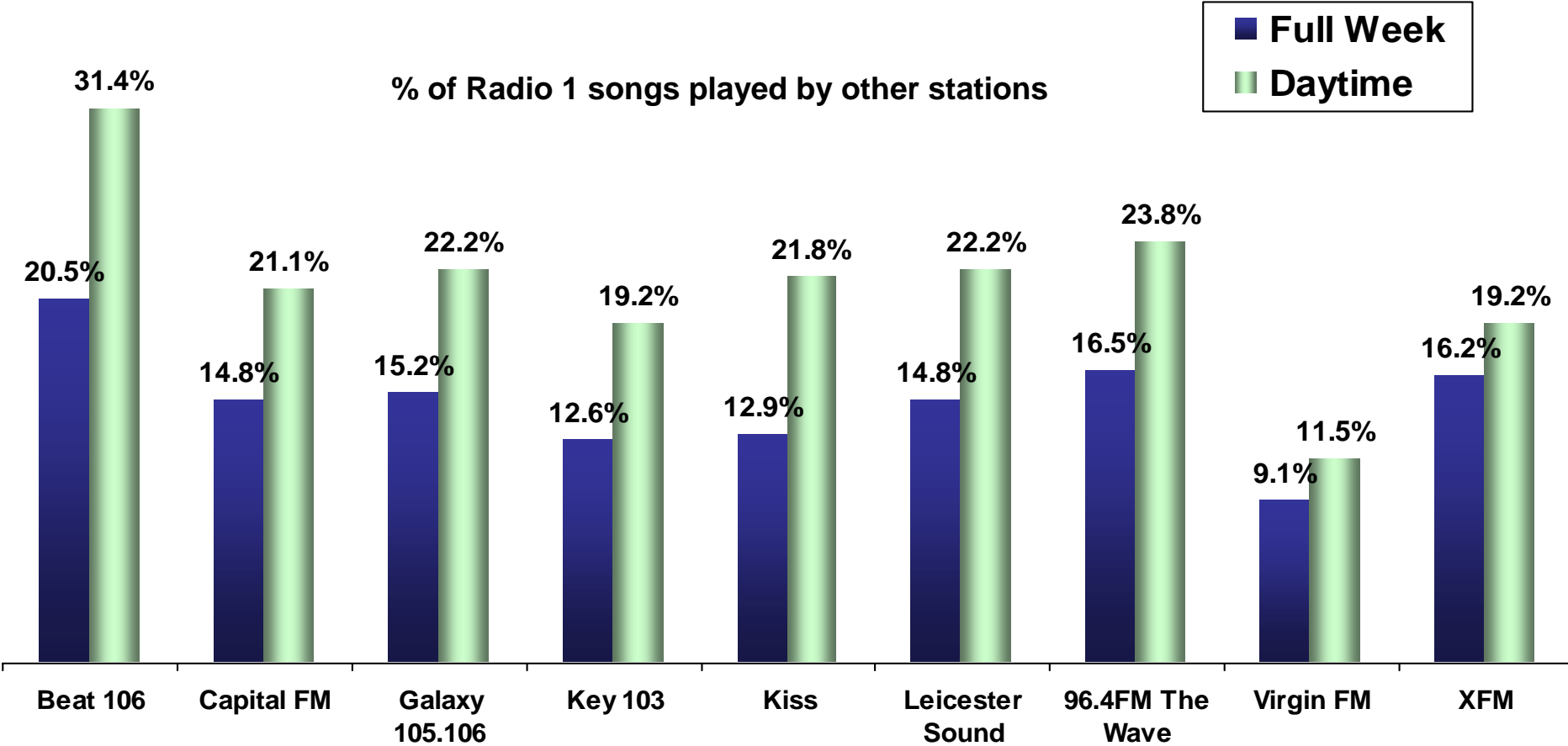
## Number of unique new songs – daytime\*

Looking at just “new songs in daytime”, half (39 of 79) on Radio 1 could not be heard on any other station in daytime. Galaxy and XFM between them featured another 39, but elsewhere it was hard to hear any different new tracks.



# Overlap of songs – full week and daytime\*

Although some stations played a similar number of songs to Radio 1, the songs played were very different on each station. On average each other station played only 15% of the songs featured on Radio 1 during the full week. Even in daytime the average just a fifth (21%).

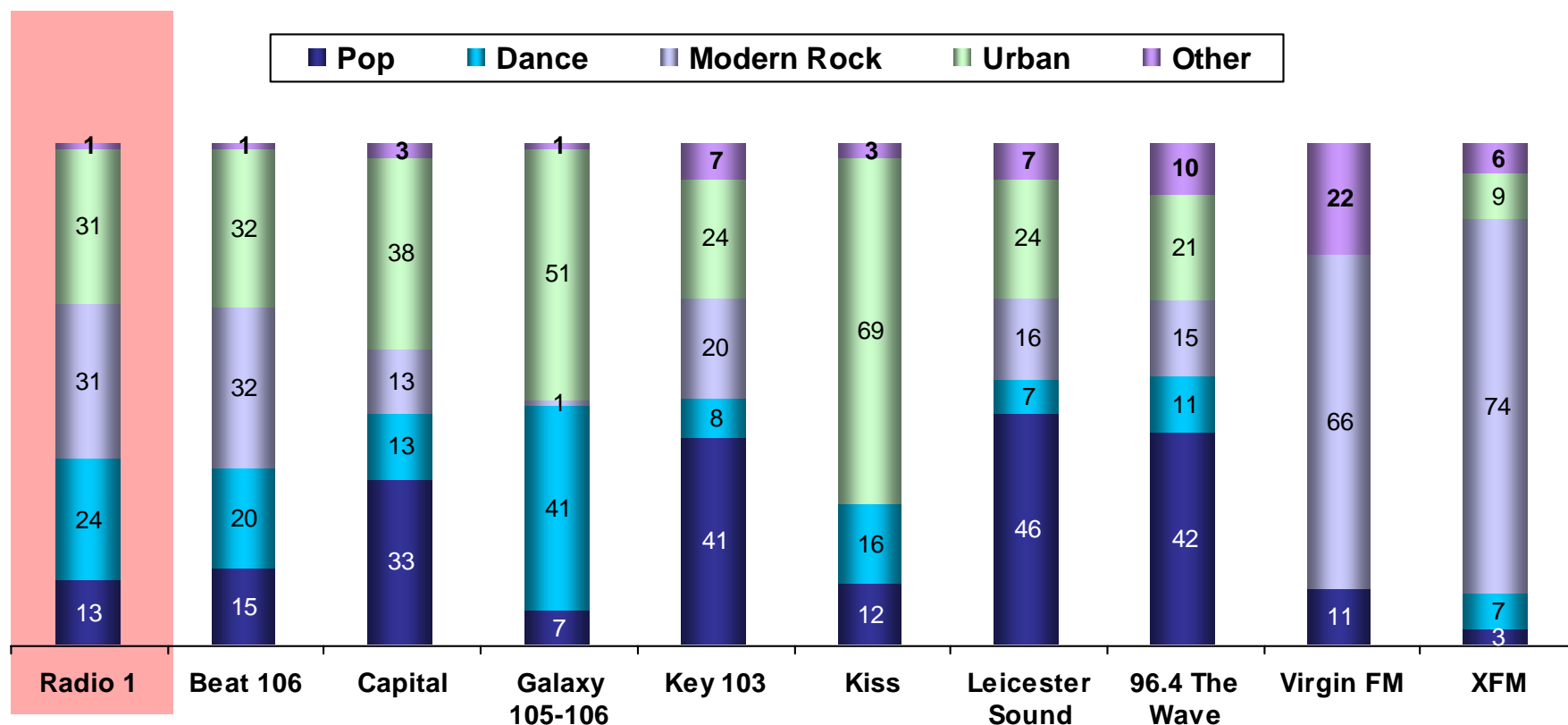


Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 7.00pm Fri. 14<sup>th</sup> May 2004)

# Breakdown of music by genre – % of all plays (full week)\*

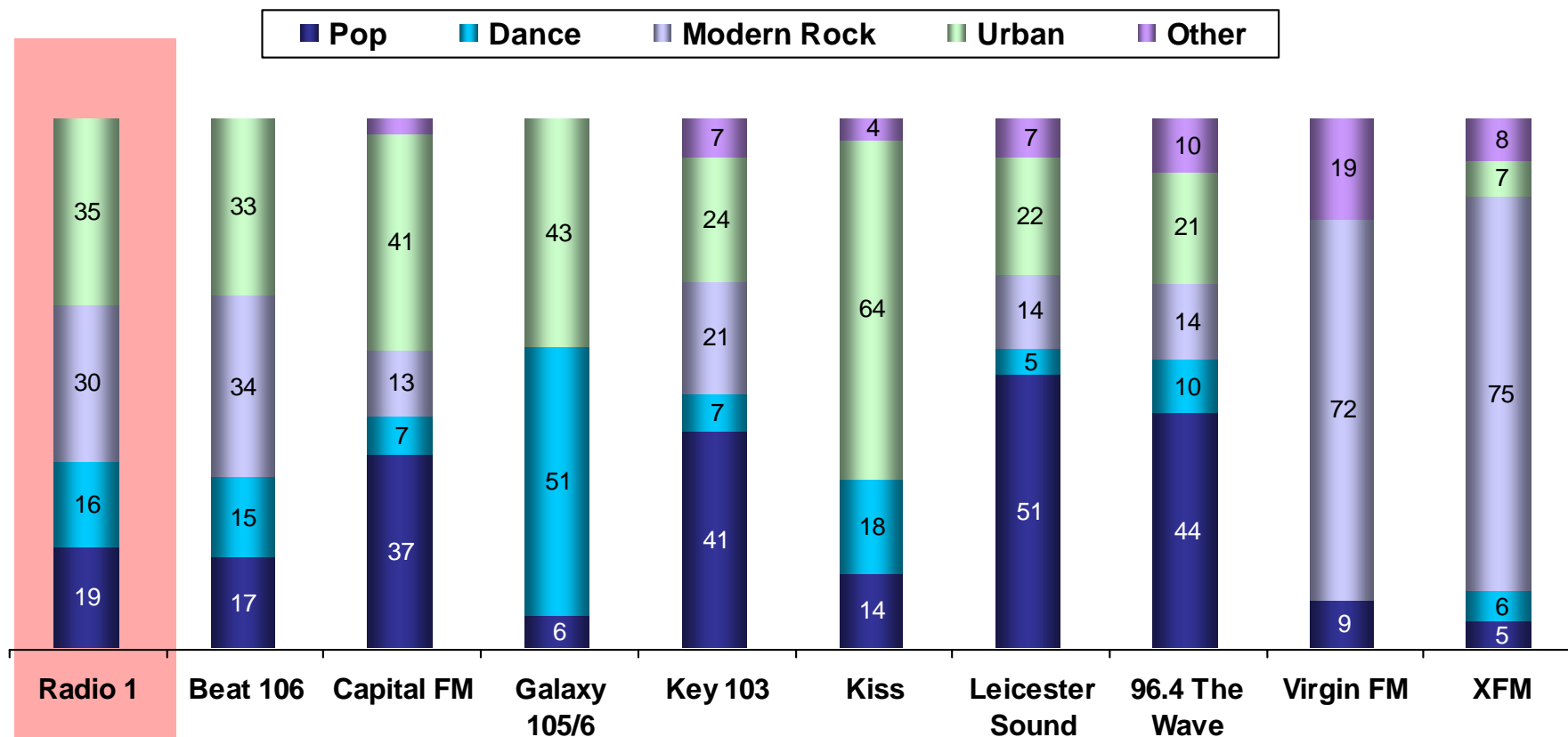
Radio 1 played an even mix of contemporary music genres, matched only by Beat 106. Radio 1's "pop" total was only 13%, compared to 30-40% on the non-specialist commercial.

Genre coding was based on the genre definitions used by the BPI (British Phonographic Industry).



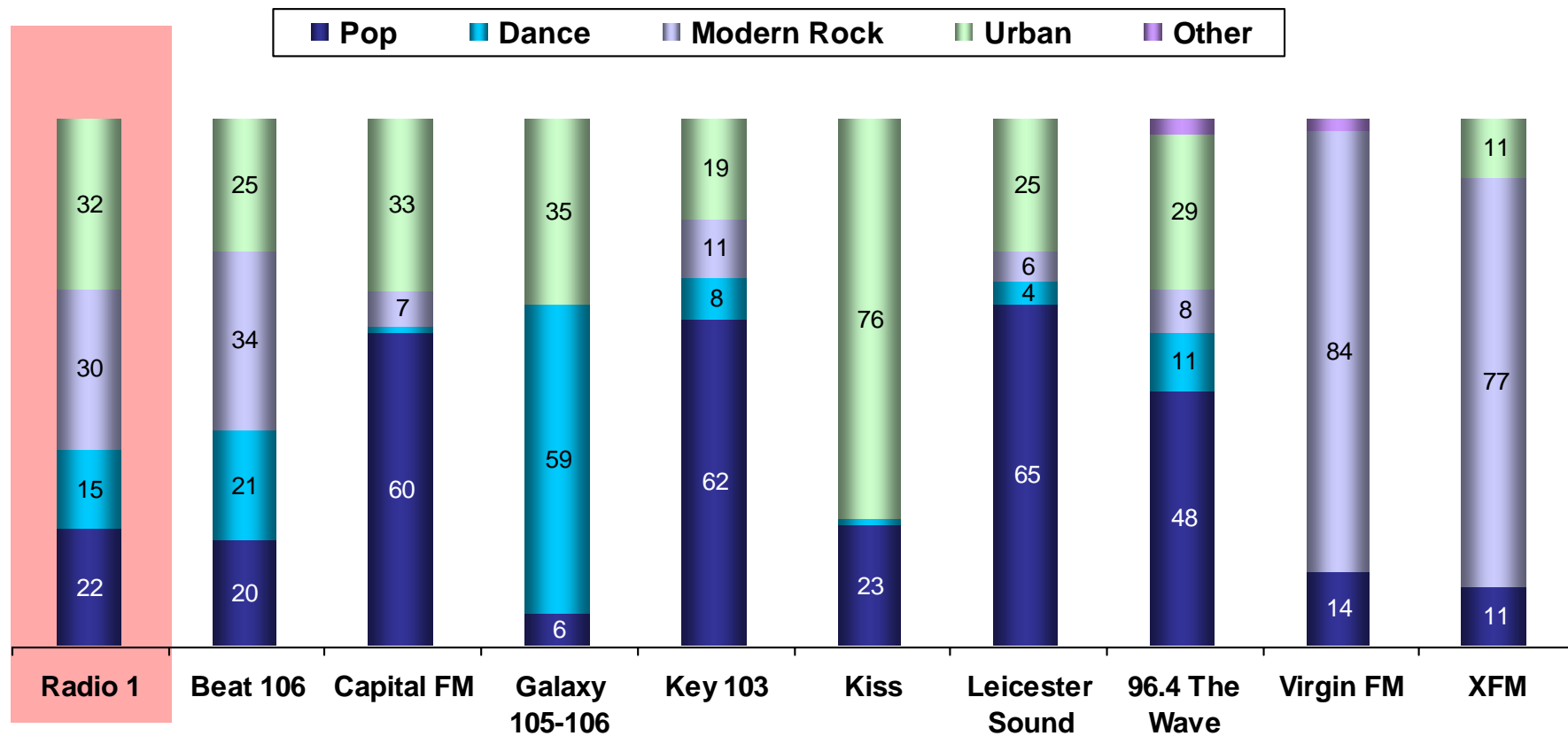
# Breakdown of music by genre – % of all plays (daytime)\*

Even in daytime, with the effect of specialist programming removed, less than a fifth of Radio 1's music was "pop".



# Breakdown of music by genre – % of new songs (daytime)\*

New music on Radio 1 came from a broad range of genres. Mainstream commercial radio leaned far more toward pop (50-60%), with some urban new music. New dance and rock music only received significant support on Radio 1, the specialist genre stations, and Beat 106.



**B B C**  
**RADIO**



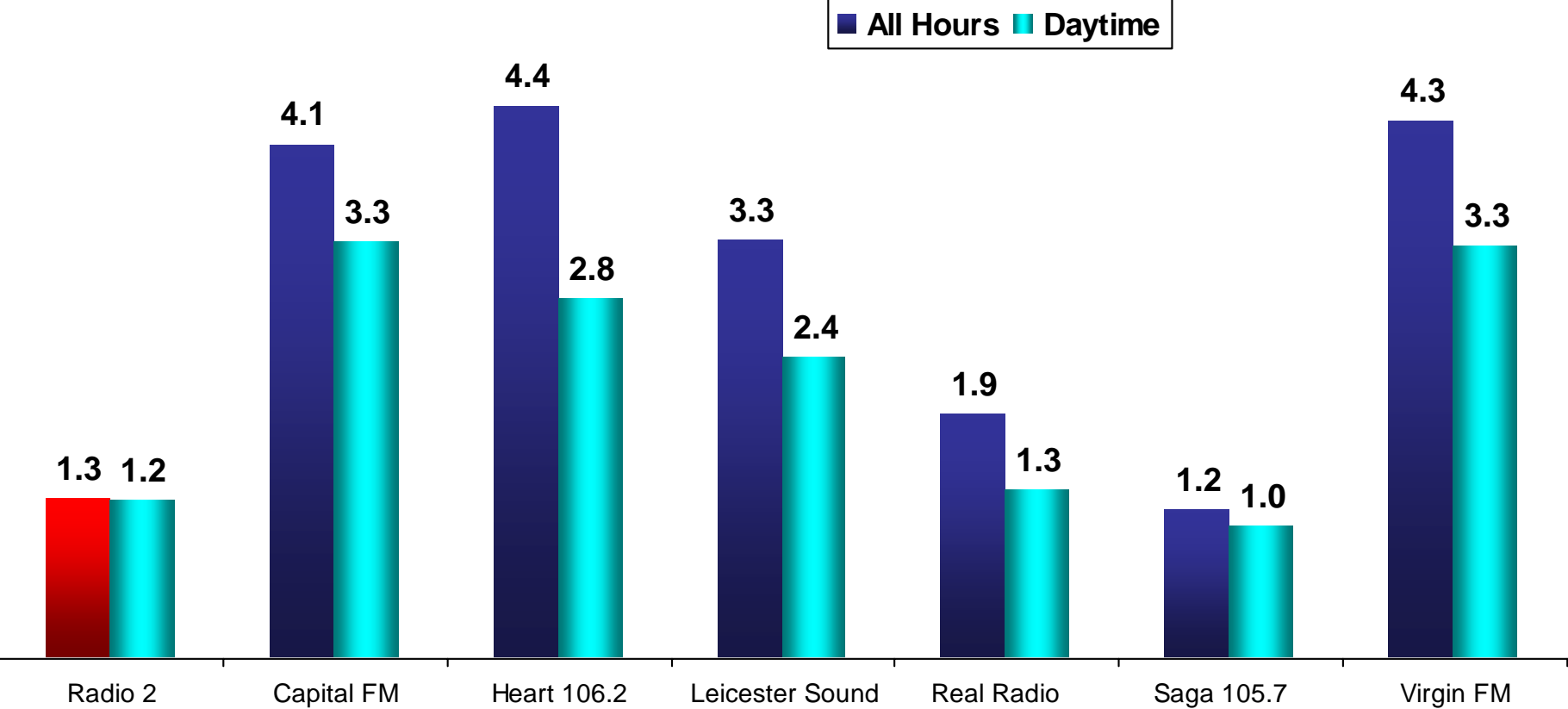
**88-91FM**

## Radio 2 music summary

- BBC Radio 2 aims to bring a wide range of popular and specialist music to an adult audience, together with a large amount of distinctive speech output from news and current affairs, to comedy, readings and social action campaigns.
- Over 40% of the output was speech based compared to less than 30% on average for the other stations sampled. As a result Radio 2 had more speech and played less music over the full week.
- Radio 2 had a low rotation rate of records, with most tracks only being played once during the week. Repetition was far higher on every other sampled station except Saga 105.7 who do not operate a playlist (for new releases) and therefore do not guarantee a certain number of plays to particular records. Capital, Heart and Virgin played each record on average over 4 times a week.
- Radio 2 played just under 1500 different tracks across the week. This was three times as many as some stations, and far higher than everyone except Saga. The songs on Radio 2 and Saga were very different however, with Radio 2's being evenly spread across eras, and Saga's coming primarily from the 70's and before.
- The overlap of tracks between Radio 2 and other stations (the number of tracks which were played on Radio 2 and also on each individual station) was very small – as low as 5%, and only 10% on average.
- Two thirds of songs played on Radio 2 during the survey week were not played on any other station.
- Radio 2 played music from over 20 different genres over the full week. This diversity was almost as great during daytime.
- Radio 2 has a strong commitment to live music, and played over 70 live tracks across the week. Virgin was the only other station with any significant live music output (10 tracks), and Heart, Leicester Sound and Real Radio featured no live tracks.

# Repetition ratio – full week and daytime\*

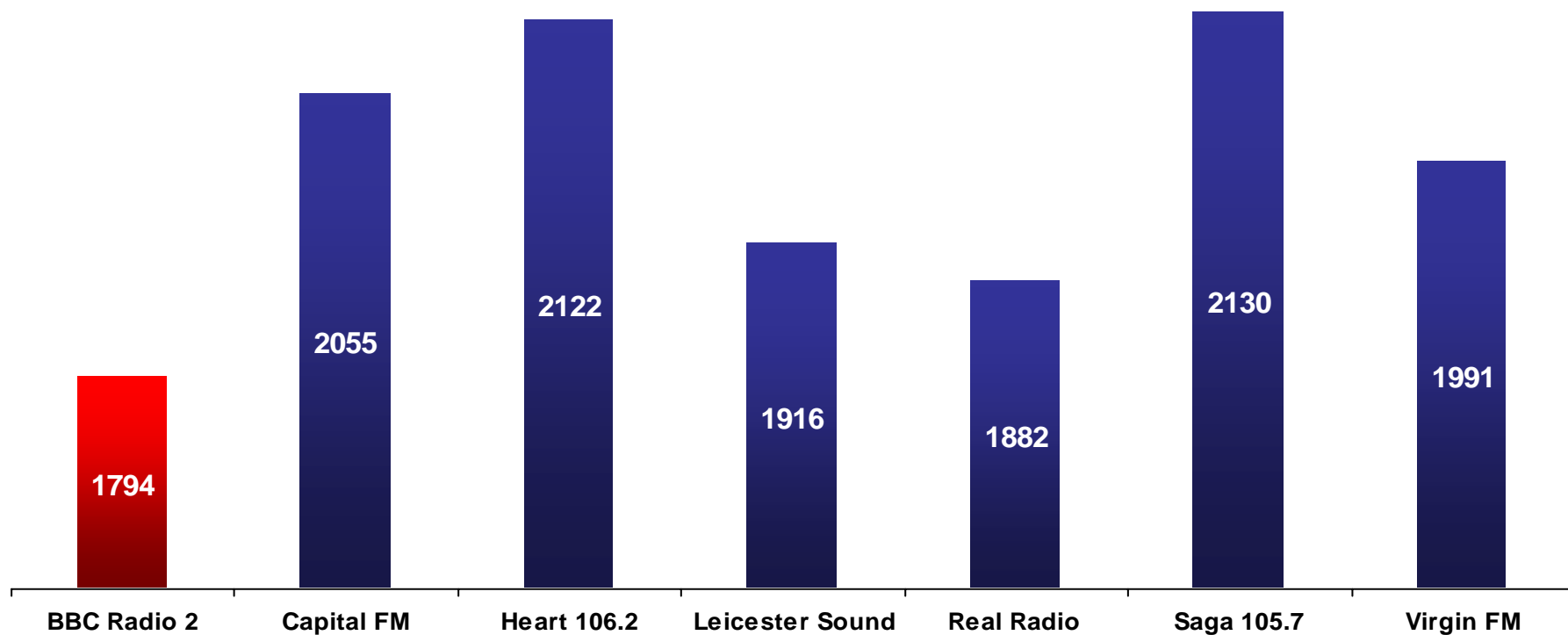
Radio 2 had a far low rotation rate of tracks than most stations, repeating each song just over once, even in daytime. On average the competitor stations sampled played each song just over 3 times (2.4 in daytime). However, this does differ by station. Saga has the lowest rotation due to the fact they do not operate a playlist for new material. Capital, Heart and Virgin played each record on average over 4 times (3 in daytime).



Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 6.00am Sat. 15<sup>th</sup> May 2004)

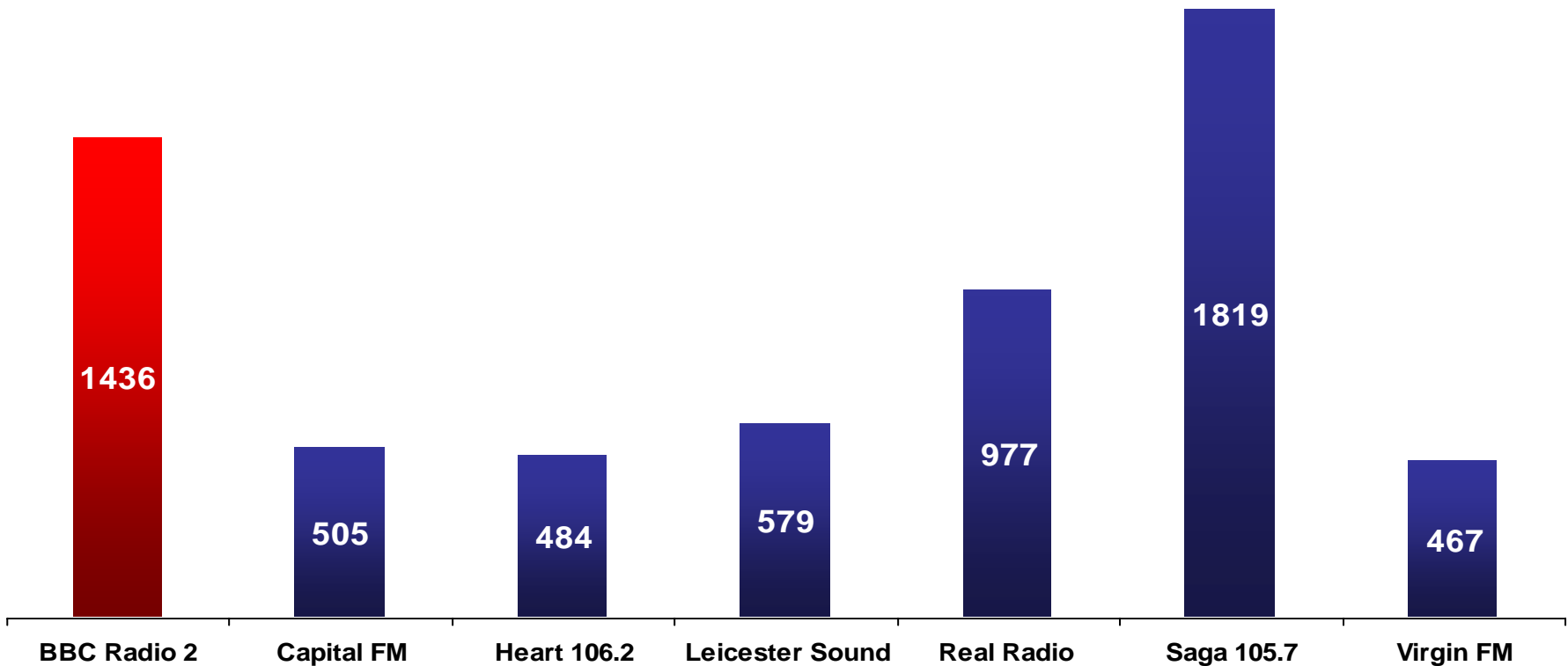
## Total plays – full week\*

Music made up 60% of Radio 2's output, with a diverse speech offering making up the other 40%. On other stations the music to speech ratio was far higher, resulting in more total music and less speech during the week.



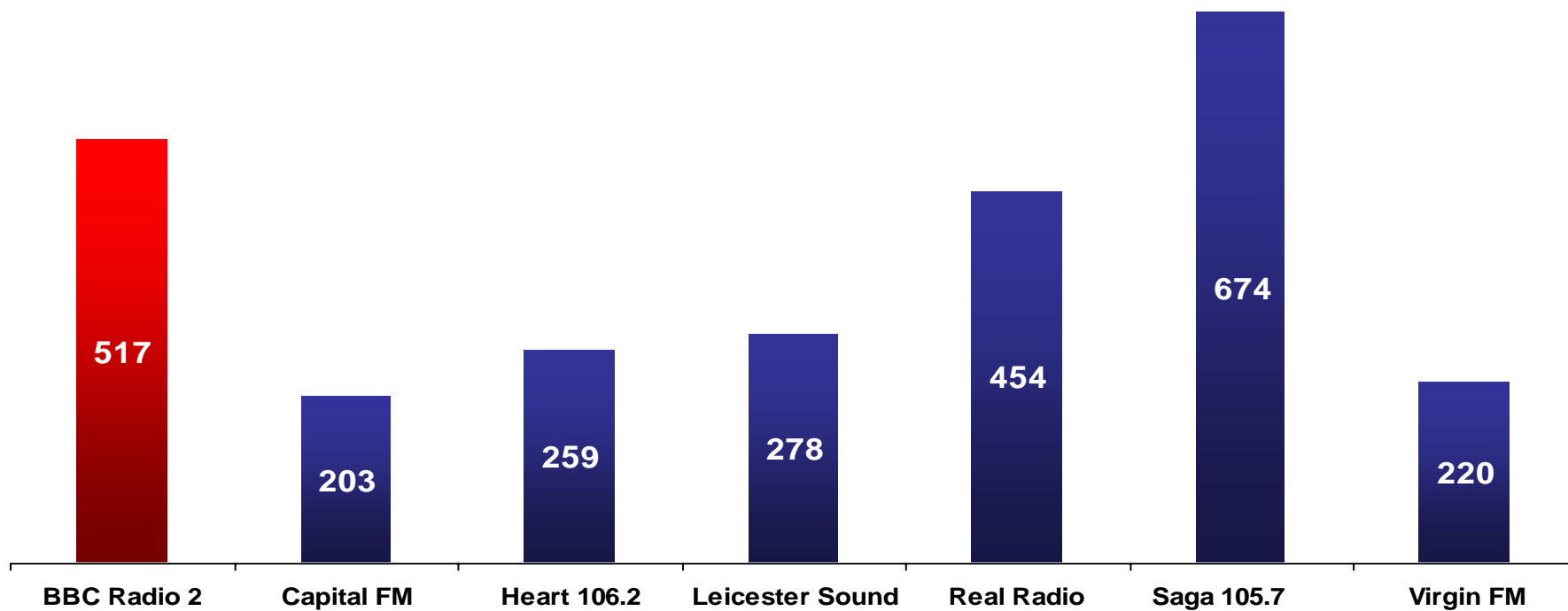
## Number of individual songs – full week\*

Despite this Radio 2 played just under 1500 different tracks across the week. Commercial Radio's higher repetition of tracks meant this was around three times as many as Heart and Virgin, and far more than any other station with the exception of Saga in the West Midlands. Saga's lack of a playlist for new tracks was again partly responsible for this, together with their lower level of speech output which means they play more music overall.



## Number of individual songs in daytime\*

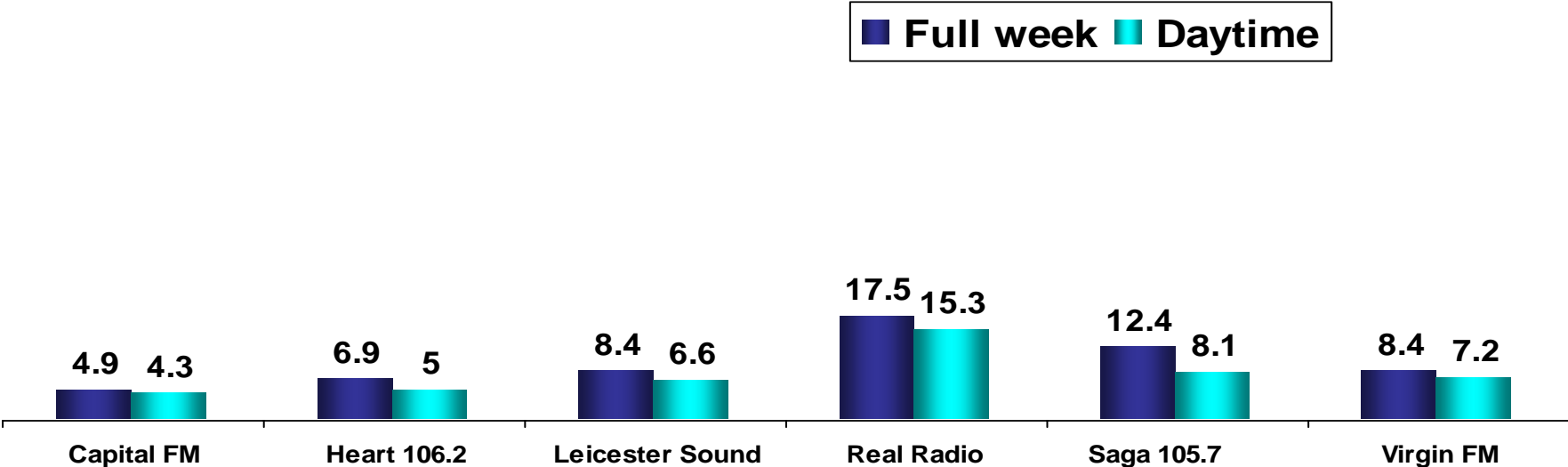
In daytime Radio 2 played twice as many records as Capital, Heart and Virgin.



# Overlap of songs – full week and daytime\*

Although some stations played a similar number of songs to Radio 2, the songs played were very different. On average there was only a 10% overlap of tracks (Records played on Radio 2 and also on the compared station) during the full week, and just 8% during daytime.

% overlap of songs

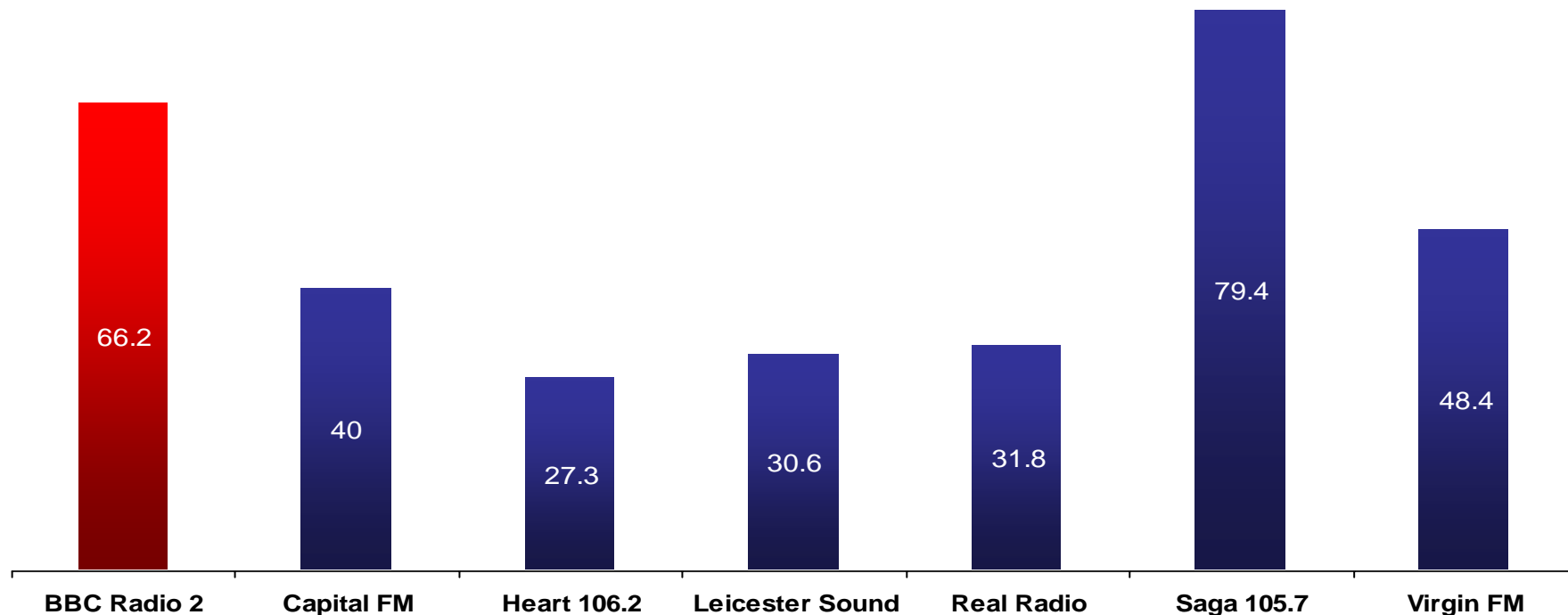


Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 7.00pm Fri. 14<sup>th</sup> May 2004)

## % of unique songs – full week\*

Two thirds of songs played on Radio 2 during the survey week were not played on any other station. A large proportion of Saga's output was also unique, but those songs were from a particular era (pre 60s) rather than across the decades like Radio 2 (see slide 35).

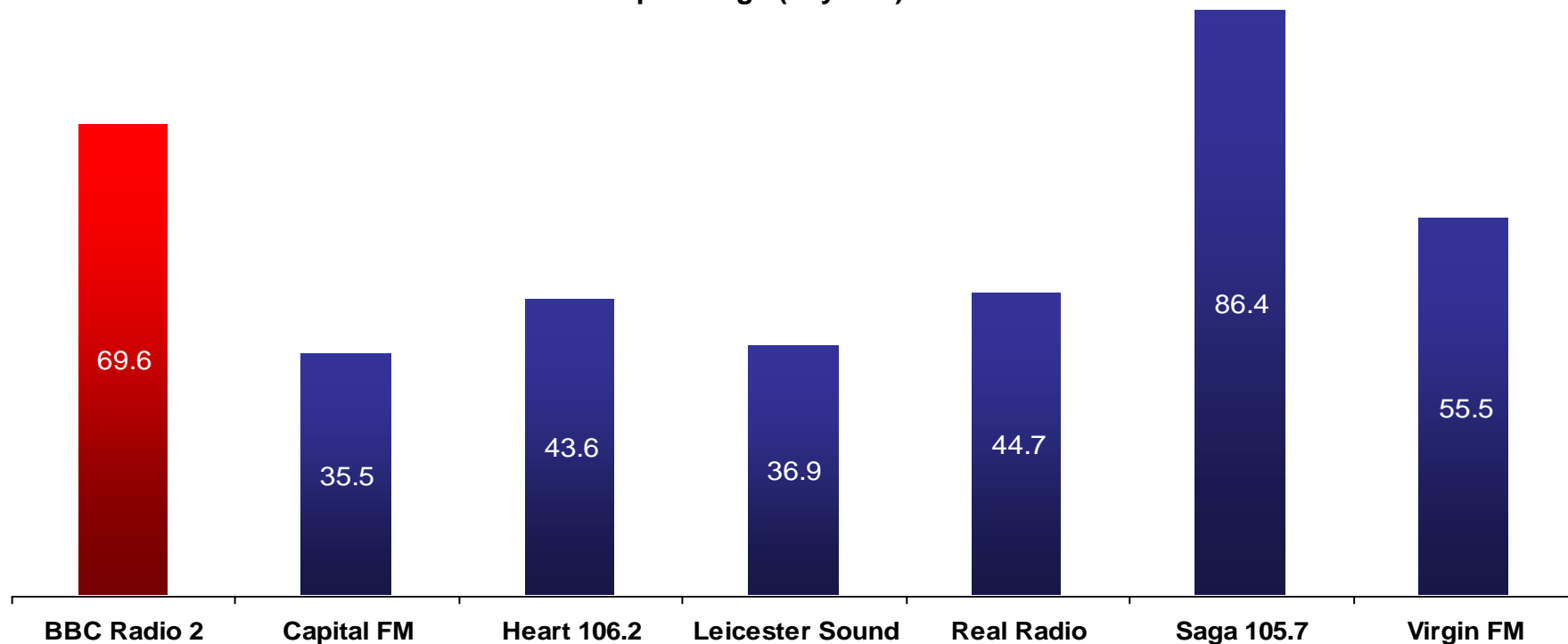
% of unique songs



## % of unique songs – daytime\*

Daytime was similar to the whole week, with two thirds of songs played on Radio 2 not played on any other station.

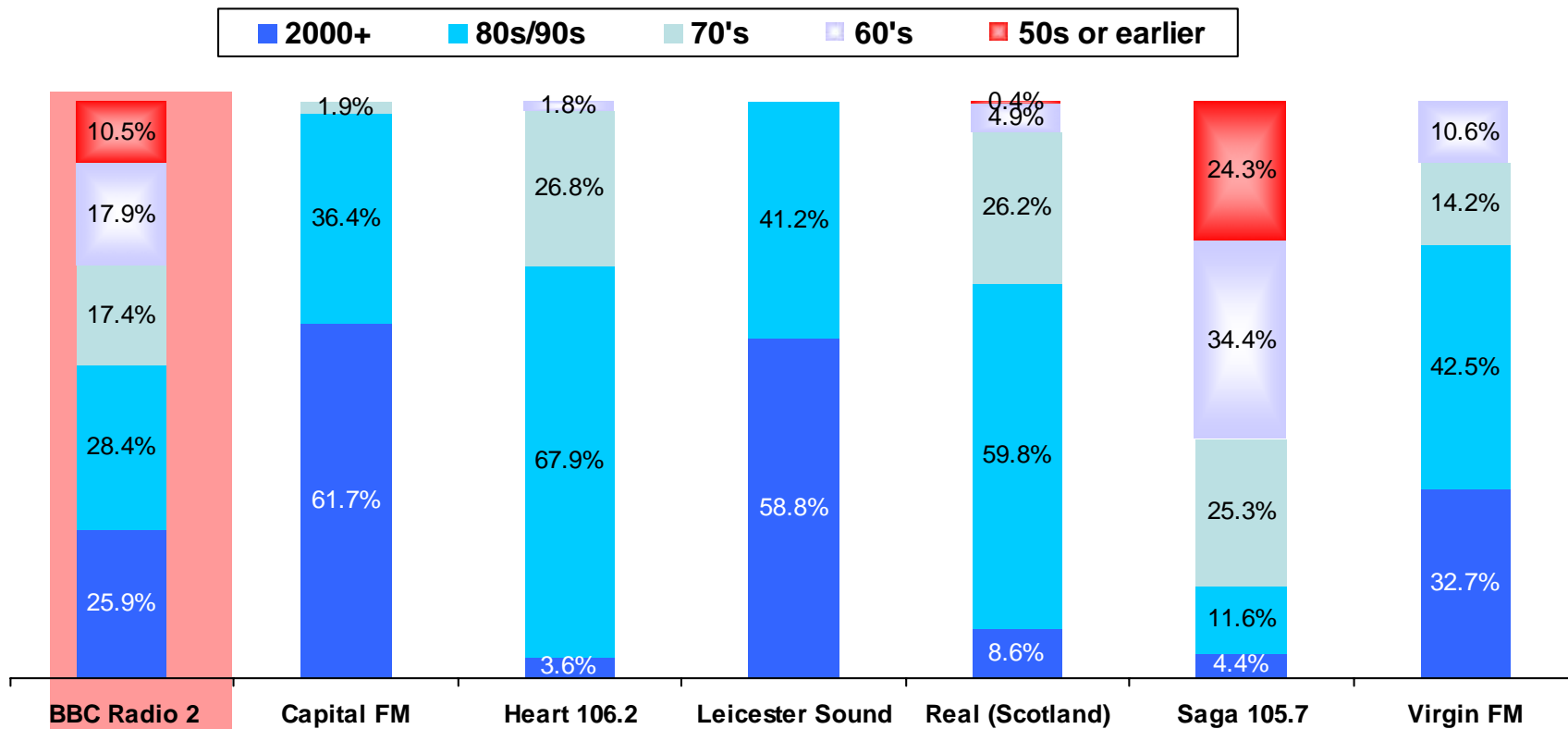
% of unique songs (daytime)



# Unique songs by era – full week\*

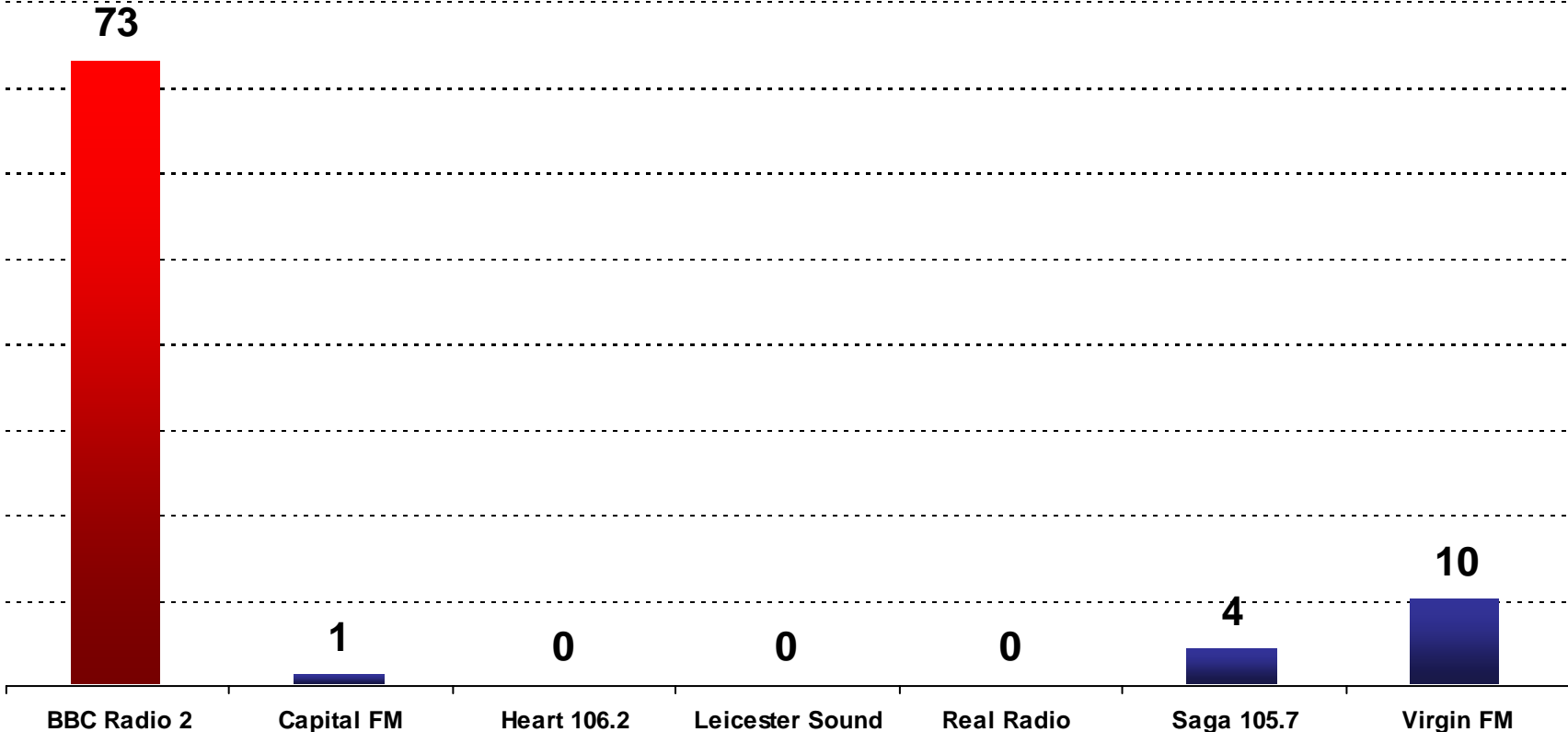
The unique records played by Radio 2 were songs from across the decades. Saga 105.7 also had a high proportion of unique records however the majority of those records came from a particular era (pre 60's).

Breakdown (%) as a percentage of total output



# Live Music – full week\*

Radio 2 has a strong commitment to live music. The station played over 70 live tracks across the week, with only Virgin out of the other sampled stations having a total in double figures. Heart, Leicester Sound and Real Radio played no live music in the surveyed week. In daytime Radio 2 played 5 live tracks and Saga featured 3, but there was no live music in daytime on the other stations.



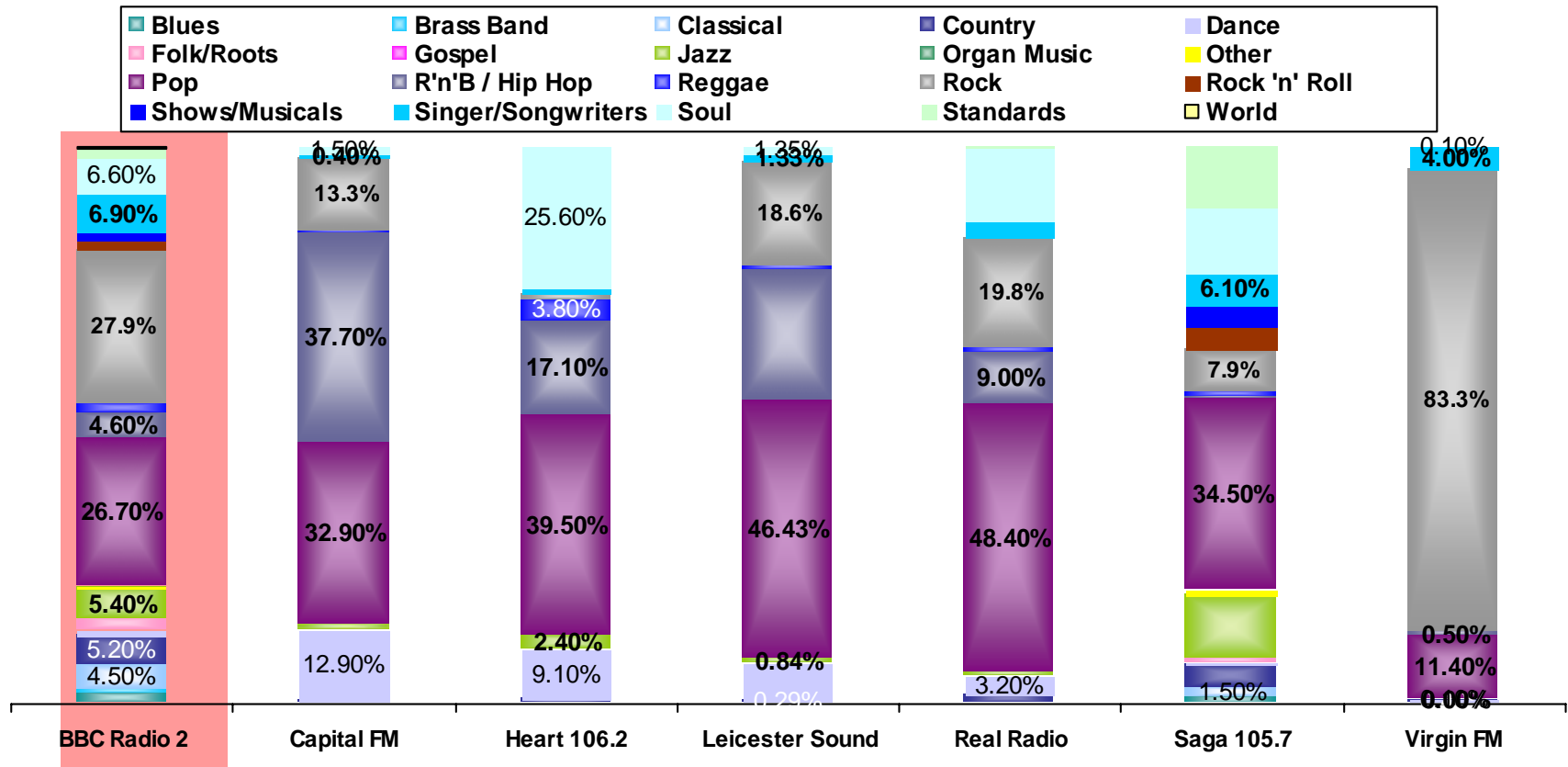
Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 6.00am Sat. 15<sup>th</sup> May 2004)

# Breakdown of music by genre – % of all plays, full week\*

Radio 2 plays music from a wide range of genres. In the week monitored Radio 2 played records from over 20 genres of music. Almost half the music on Leicester Sound and Real Radio was “pop”.

Genre coding was based on the genre definitions used by the BPI (British Phonographic Industry).

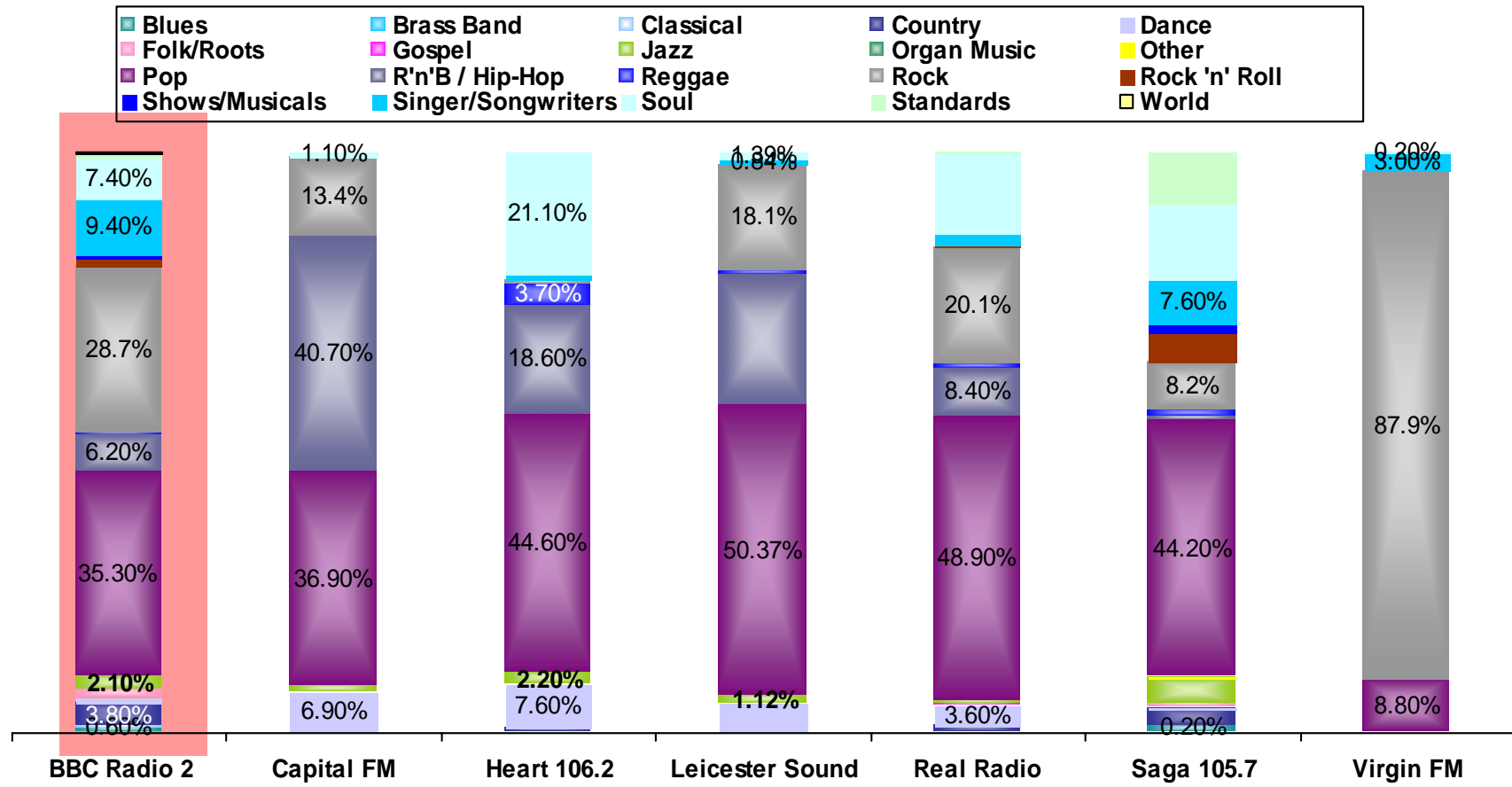
## Breakdown (%) by genre as a percentage of total output



# Breakdown of music by genre – % of all plays, daytime\*

And this breadth of music is mirrored in daytime. Radio 2 broadcast music from 17 different genres across the day.

### Breakdown (%) by genre as a percentage of total output

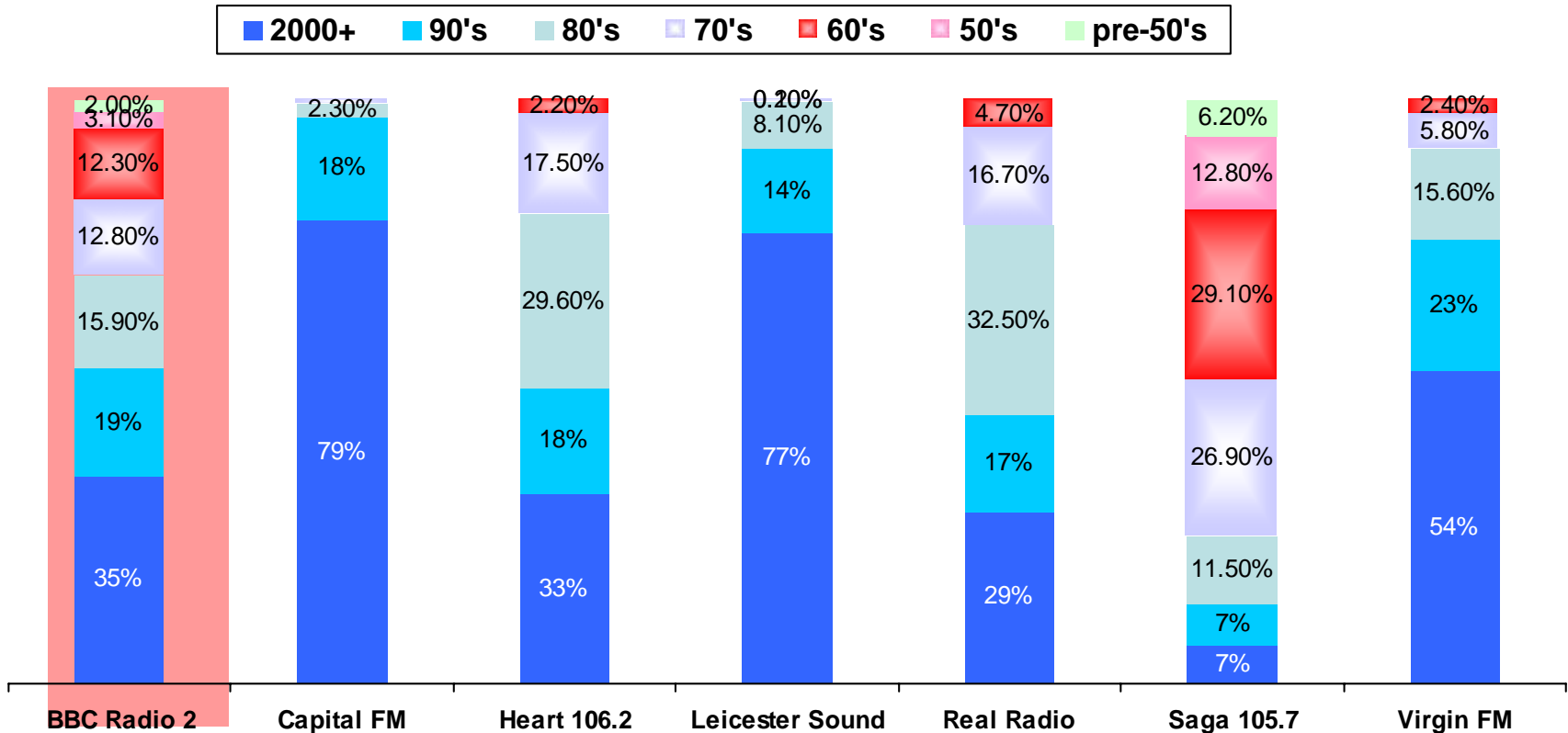


Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 7.00pm Fri. 14<sup>th</sup> May 2004)

# Breakdown of music by era – full week\*

Radio 2 played a wide range of music from across the decades. Three-quarters of the music on Capital and Leicester Sound was from 2000+, Heart and Real Radio lean more towards 70's and 80's music, and Saga concentrated on the 70's and earlier.

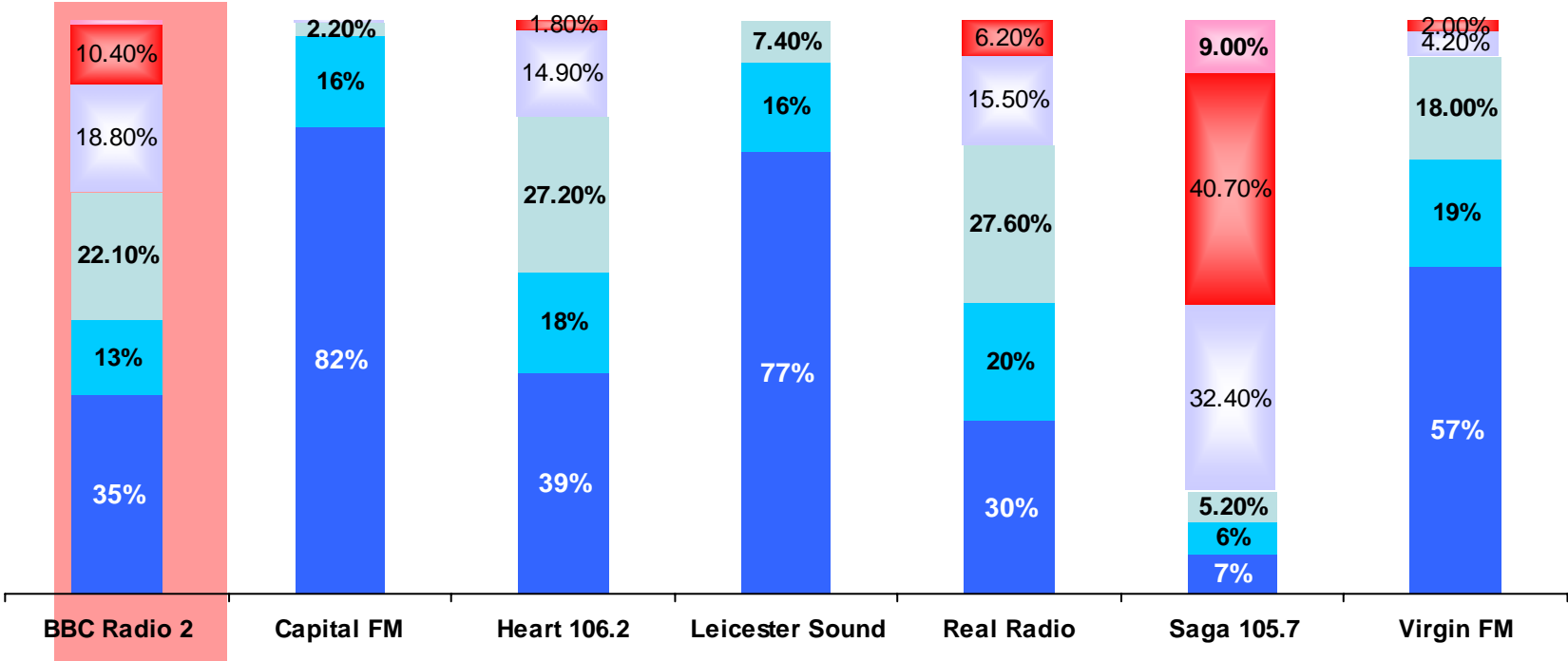
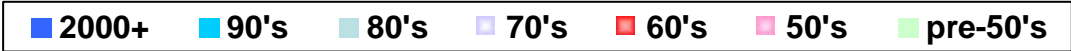
Breakdown (%) as a percentage of total output



# Breakdown of music by era – daytime\*

This was echoed in daytime.

Breakdown (%) as a percentage of total output



Source: Intelligent Media Ltd (Survey period 6.00am Sat. 8<sup>th</sup> May – 7.00pm Fri. 14<sup>th</sup> May 2004)