



# **Audience Research into BBC Digital Radio Services**

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# Background

- DCMS seek an independent review of the BBC Digital Radio Services, the purpose of which is to consider:
  - How far the digital services have achieved their state purpose as laid out in their licence and conditions
  - Their impact on the market place
  - Their contribution to driving up digital take up
- Audience review to focus on 1Xtra and BBC Asian Network
- Both have remits intended to differentiate them from commercial competition and to reach audiences who generally make less use of the BBC than others
- These stations are also required to achieve high editorial standard, stimulate and support diversity of cultural activity in the UK
- Audience research into the above stations required

# Research Objectives

- Overall, to understand how 1Xtra and BBC Asian Network are perceived by their respective audiences.
- More specifically, to ascertain:
  - Perceived strengths and weaknesses of these stations
  - Extent to their material appeals: music, speech, news, current affairs etc.
  - Interest and appeal of issues in speech segments
  - How these stations compare with their commercial counterparts
  - Whether their public service differentiation is perceived to provide added value

# Research Objectives Cont'd

- How far 1Xtra is seen to promote and reflect black British music
- Whether the balance between English and Asian languages on BBC Asian Network are felt to be appropriate
- How audiences access these stations
- Extent to which audiences use and what they think of multi media functions

# Sample and Methodology

- 6 x 2 hour group discussions, structured as follows:
  - African Caribbeans, 16 – 25, mixed sex      LONDON
  - Asians, 18 – 30, mixed sex      LONDON
  - Asians, 31 – 45, mixed sex      LONDON
  - African Caribbeans, mixed sex      BIRMINGHAM
  - Asians, 18 – 30, mixed sex      BIRMINGHAM
  - Asians, 31 – 45, mixed sex      BIRMINGHAM
- Conducted during July 2004
- Mix of current and potential listeners
- Range of mother tongue languages
- Access via digital satellite TV, Freeview, DAB, online

# Radio Listening Habits

# Radio Listening Habits

## BREAKFAST

Habitual, routine. 1 or 2 favourite and regular stations

## DRIVE TIME/OUT AND ABOUT

Repertoire of 3 – 4 favourite stations. Switching between stations depending on music, issues discussed. Seeking out news/travel info. between these stations

## EVENING

Relaxation, unwinding, leisure. More selective listening. Dependent on particular genre of music, programme. (Older Asians: specific language output for minority)

# Listening Patterns

## YOUNGER FEMALES

- Narrower menu of stations
- More driven by habit, less experimental
- Ethnic radio part of repertoire

## OLDER ASIAN MALES

- Equally enjoy Asian and mainstream
- Greater interest in news, current affairs, talk radio
- Greatest involvement in BBC mainstream output

## YOUNGER MALES

- Range of stations. Greater listening of 'underground', pirate stations
- More experimental
- Asians: mainly mainstream and other 'ethnic' stations. Asian stations usually as shared listening
- African Caribbeans.: little mainstream stations beyond Radio 1, Galaxy

## OLDER ASIAN FEMALES

- Generally, Asian radio mainstay of listening
- Traditionalists
- Almost no listening of mainstream stations

# Key Drivers in Choice of Station

**MUSIC TASTES**

**KNOWLEDGE/INFORMATION**

**LANAGUAGE NEEDS**

**CULTURAL CONNECTION/RESONANCE**

# Music Tastes

## URBAN

- African Caribbeans: culturally relevant music, style, (topics)
- Younger Asian men: hip, funky, cutting edge
- Underground/pirate, some legal
- Choice, 1Xtra, Radio 1 (Westwood) Flava, New Style, Silk City, Freeze, PCRL, Sting, Hot 92

## SPECIALIST

- A few older Asians
- Something different
- Classic FM, Jazz FM

## 'ETHNIC' MUSIC

- Older Asians
- Younger Asian women
- African Caribbeans
- Premier, BBC Asian Network, XL, Sunrise, Club Asia, Punjab Radio

## MAINSTREAM/POP

- Younger Asians
- Older Asian men
- African Caribbeans in Birmingham (Galaxy)
- Heart, Kiss, Capital, Radio 4, 5 Live

# Information/Knowledge

- All desire basic news coverage, local information and travel
- Level of interest in talk based stations and programmes generally amongst older Asian men and some younger Asian and African Caribbean women
  - Enjoy debates, analysis of current affairs
  - Keeping up to date, want to be stimulated
  - Other samples primarily restricted to news, travel info., maybe discussion if interesting when flicking – less likely to seek out these types of stations/programmes
- Tends to be during morning/evening drive time, travel during the day
  - Mainstream stations (Galaxy, etc.)
  - Specialist: Talk Radio, Radio 4, LBC, News Direct
  - Ethnic: BBC Asian Network

# Language Needs

- Mainly older Asian women
- Preference and greater dependence on non English Asian stations, specialist language stations (a minority of our sample)
  - Mainstream English stations of little relevance
  - Sunrise Radio, Radio XL, Punjab Radio, (BBC Asian Network)
- ⇒ HOWEVER, there was little listening of programmes in languages other than Hindi:
  - ⇒ Most understand Hindi
  - ⇒ Language programmes felt to be at inconvenient times
  - ⇒ Prefer to seek out specific stations catering for these languages
  - ⇒ Minority of older women listening to Gujarati programmes

# Cultural Relevance

- Desire for own 'cultural' music:
  - Important for all
  - Except some younger Asian men – language a barrier for some
- Connection with and reflection of cultural values (older Asians)
- Topics and issues of direct cultural relevance/pertinence
- Religious programming:
  - Mainly older Asian women
- Desire for 'something for us, by us'
- 1Xtra, Choice, pirate/community stations, XL, BBC Asian Network, Sunrise

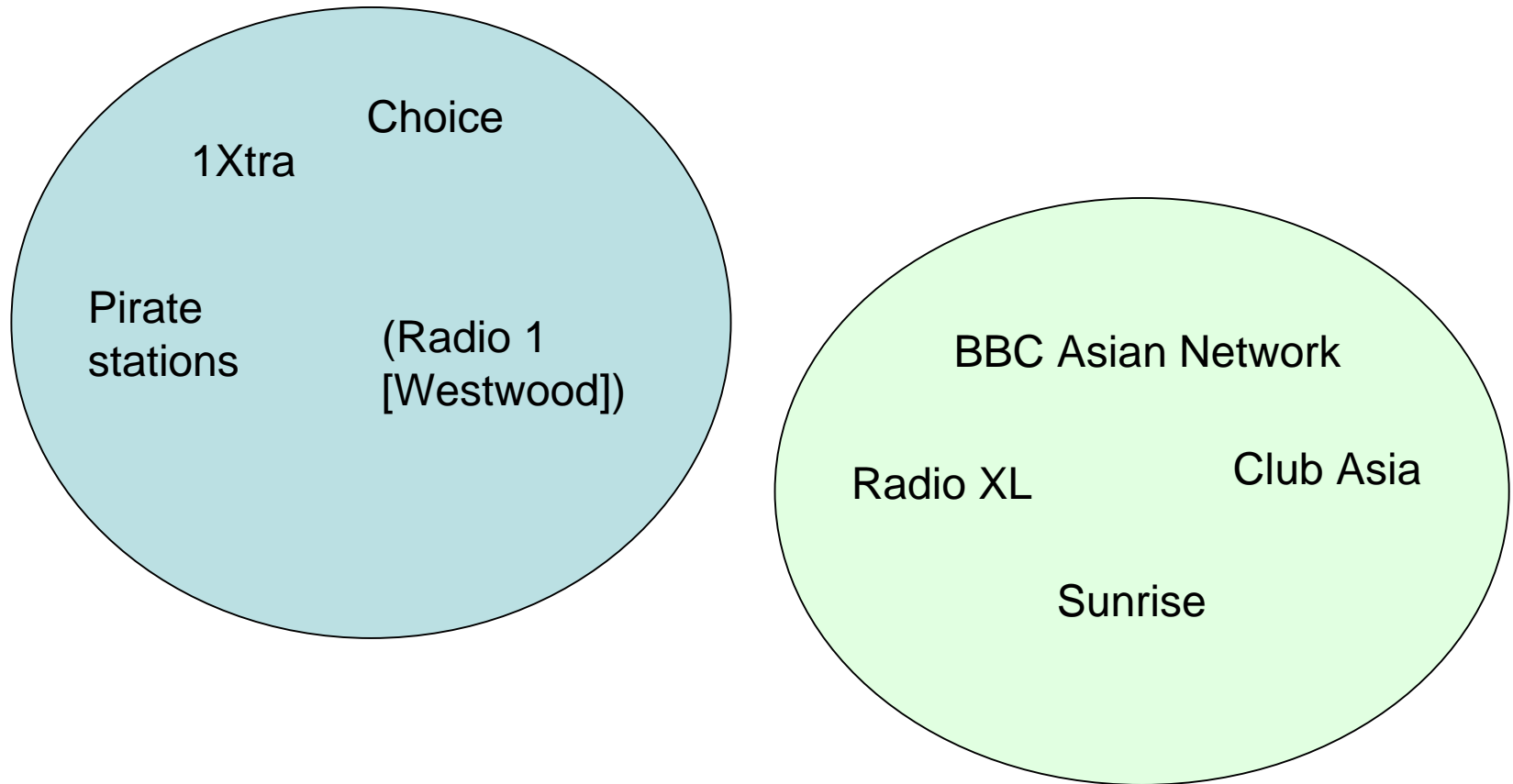
# Accessing Stations

- Listening on the move
  - Continues to be via analogue radio, only 2 respondents in sample had access to DAB in car
- At home/leisure:
  - Approx. half listening via digital television:
    - Evenings, weekends
    - Background music
    - Access to specialist stations e.g. Punjab Radio, Premier, other specialist music stations
    - Including 1Xtra, BBC Asian Network
- Others via analogue radio (mainly older women)
- Approx. a quarter accessing stations online:
  - During work/studying, surfing the net
  - A range of stations: 1Xtra, BBC Asian Network, international stations

# Impact of DAB

- Very limited usage so far, only three or four across the whole sample
- Key barriers to take up:
  - Perceived cost
  - Lack of perceived need:
    - ⇒ Digital radio services available through media already to hand
- Current users i.e. early adopters who undoubtedly see benefits:
  - Sound quality
  - Ease of accessing range of stations
  - Continuous geographic coverage
- Others have little knowledge of what DAB is, how it works

# Competitive Context



**1Xtra**

# Radio Listening Needs

- High music content
- Primarily black/urban music rather than chart
- What's new on the music scene
- What's going on: events, gigs etc.
- Short, simple news, not detail
- Local information and travel rather than current affairs
- Entertainment (rather than intellectual stimulation)
- Gossip, humour and chit chat rather than in depth discussion

# 1Xtra vs. Competition: Overview

- 1Xtra seen by sample to compete with legal 'black' stations, pirate stations and Radio 1's specific Westwood show as
  - Targeting a black audience
  - Playing 'black' music
  - Providing information relevant to the black community
- Respondents struggle to identify any real differences in these stations beyond perceptions of the music focus and target audience in terms of age when prompted
- Choice of station largely determined by:
  - Ease of access
  - Familiarity/habit
  - Desire for something new

# Competition

## 1xtra

- New 'black'/urban radio station
- Covers range of music styles
- Professional, slick, modern
- New talent
- Very similar to Choice re: music, target audience
- ⇒ BUT limited, more difficult access, so, planned listening at home, work
- ⇒ Lack of awareness for some

## Choice

- Established, well known
- The original black station
- Familiar, habitual
- Range of music styles
- Caters for all ages
- Easy to access on analogue and digital
- Therefore, both 'music on the go' and at home

## Pirate Stations

- London: Beat FM, Unique, Freeze, Revive
- Birmingham: Flava, Silk City, New Style, PCRL
- Underground music, new sounds
- Local bands
- Local information re: gigs, artists from 'back home'
- Community feel
- ⇒ BUT poor quality of sound, inconsistent transmission

# Competition Cont'd

- Radio 1 Westwood show enjoyed by many but only BBC station really listened to
- Often planned listening
- Music genres similar to other stations
- BUT presentation is professional

# Quotes

***“Pirate stations give you something no else gives you, what’s on the street.”***

***“Other stations can only do what they are told.”***

***“Choice tries to cater for all ages, plays younger and older tracks.”***

***“Choice has been around longer, it’s the station I would choose.”***

***“[1Xtra] is an urban station.”***

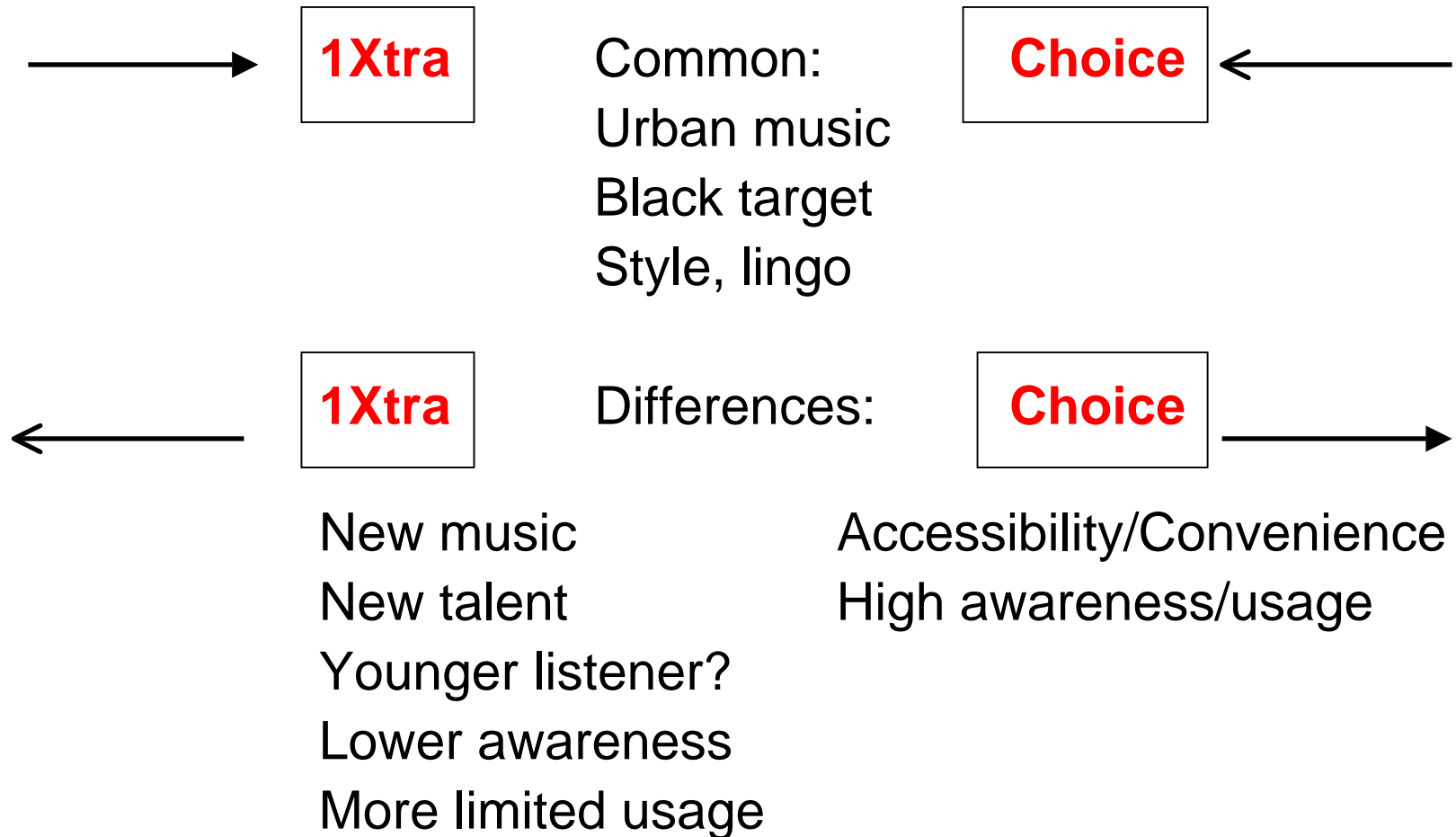
***“[1Xtra] Heard of it but I don’t know what’s on it... what kind of music it is.”***

***“It’s a legal station but it’s just not accessible to everybody.”***

***“New Style is Birmingham based and it covers African community information, talks politics.”***

***“Pirate – they come out with a lot of dances... artists coming from Jamaica, they have their dances here in Birmingham.”***

# 1Xtra vs. Choice



# 1Xtra vs. Choice Cont'd

***“They’d be in competition with each other. If they were in a room together they’d kick each other out.”***

***“Choice would a fun, black person, loud, someone who got on with everyone. 1Xtra would be the same type.”***

***“Choice is just a bit older, more adult.”***

***“They all play R & B, hip hop, garage, just urban music.”***

# 1Xtra: Current Listeners

- 2/3 current listeners in each group
- Accessed via:
  - Internet, digital TV, (DAB in car)
- Particular shows mentioned:
  - Femme Fatale
  - Rodney B & Skitz
  - Ace
  - KC
  - Robbo
- Initial awareness for current listeners through:
  - marketing campaigns esp. on BBC television
  - ‘by accident’ when flicking on digital TV
  - Searching radio stations on the internet

# 1Xtra: Current Listeners Cont'd



- Type and range of music played
- Urban, fresh, modern
- Promotes new talent
- Professional feel
- Non chart focus
- Web site: quality, ability to listen to previous programmes



- Some presenters – Ace?
- Night time programmes a bit hit and miss – quality, music played

⇒ **Little spontaneous mention of speech segments**

⇒ **Not really that different from Choice**

⇒ **Another choice in the menu of stations to ring the changes**

# Potential Listeners

- Overall, very positive responses from current non listeners
- Initial expectations prior to listening:
  - BBC therefore staid, ‘safe’, mainstream
- Actual experience:
  - Really enjoyed: music, presenters
  - Felt like a black station ‘just for people like us’
  - Impressed that the BBC has provided such a ‘hip’ station
  - Professional, quality
  - Some speech segments: gossip, what’s going on in America
- These perceptions endorsed by sample clips played

# Prompted Responses



- Cool, funky style
- Latest music, caters for all black music tastes
- Quality news, information
- Professional and modern
- Quality and range of presenters
- Well known presenters
- Repartee between presenters enjoyed – mirrors their own style of language
- Humour



- Too much speech
- Output very similar to Choice – nothing that distinctive
- Perceived London focus (Birmingham)

# Quotes

***“If I heard that like that is, I’d listen to that every single day.”***

***“It’s cool.”***

***“It’s like, they’re funny. It’s the kinda talk you’d hear in the barbers.”***

***“It’s the same sort of format, the jokes, the music, the way they speak as Choice.”***

***“They speak on the level of the people.”***

***“It sounds real, that does, like they’re just doing their thing, how they are.”***

***“It’s for the black community.”***

***“If people really wanted it [speech], they’d watch the news.”***

***“They’re talking too much.”***

# Attitudes to Speech Segments

- Overall, this sample is less interested in speech segments per se than the Asians: want more music, less talk
- However, when exposed to the range of issues covered in speech segments, appreciated on a rational level:
  - Good range of issues, good mix of positive and negative topics
  - Of cultural relevance and interest
- ⇒ Good that 1Xtra does them, might listen if come across but most not likely to seek out, unless a topic grabs them
- ⇒ Desire for:
  - More humorous stories
  - Want short (5 minute) speech
  - More gossip, star interviews/stories, Hollywood
- This age group do not want more

# Quotes

***“Racism yes, but you want to hear things like, Halle Berry’s got a new boyfriend or Denzel Washington has been awarded.”***

***“They’re alright [issues], they cover all the things.”***

***“They are based on our culture, the things we can relate to.”***

***“There’s too much talk anyway, why do you want more?”***

***“I’d watch the news.”***

***“It’s good they cover it. It’s important that people look at things from a different angle.”***

***“They should do it at a time when people are most interested. When you’re up for listening to music you don’t want to hear chat, you just want music.”***

# Perceptions re: 'Added Value'

- Respondents do not necessarily recognise or appreciate the BBC's public service differentiation as not front of mind when listening to the radio BUT when prompted, this can be important/fits with perceive role of the BBC
- There are a number of expectations from a BBC output:
  - Quality of news coverage
  - Trust in information provided
  - Professionalism
  - Commitment to providing minority ethnic targeted services
- ⇒ 1Xtra delivers this and does differentiate but music content is most important to this sample

# 'Added Value' Cont'd

- Key role identified for 1Xtra:
  - Provide choice
  - Provide high quality targeted output
  - That is culturally relevant, leading edge
  - Promote black music, reflect black culture
- Social Action, when prompted, fits with expectations, does provide added value

# Extent to which remit is met

Requirements	Met?	Level of Importance
Contemporary black music	✓	✓
Young urban	✓	✓
Range of music genres	✓	✓
New black music	✓	✓
Information, discussion	✓	?
Social action	?	Could be
Diversity of black culture	?	?
On line provision	✓	✓

# Summary

- Some listening of station across groups but primarily 1Xtra is part of the repertoire of radio listening
- For non listeners barriers are:
  - Non analogue access
  - Lack of awareness
  - Lack of experience
  - Rather than dislike of output
- Access is via internet and digital television with a very small no. by DAB
- However, responses to the station are positive in terms of content, style, tone and promotion of new music
- Little spontaneous value placed on speech –not main focus for most but topics are seen as relevant and appealing
- Social action can be a differentiator and there is perceived value in this and can generate good will

# Summary Cont'd

- However, the station is not seen as particularly distinctive from competitors except in image: fresh, new, exciting, modern
- BUT it is seen as important in
  - Providing choice
  - Demonstrating the BBC's perceived duty to provide targeted output
- There is opportunity as more listeners are exposed to the station and there is increasing uptake of digital for 1Xtra to
  - Continue to promote new and UK music and new talent
  - Promote social action and other positive community initiatives in order to give the station a 'community feel' cf. pirate stations
  - Continue to promote online to increase daytime listening
  - Provide greater information on events, gigs in key areas

# **BBC Asian Network**

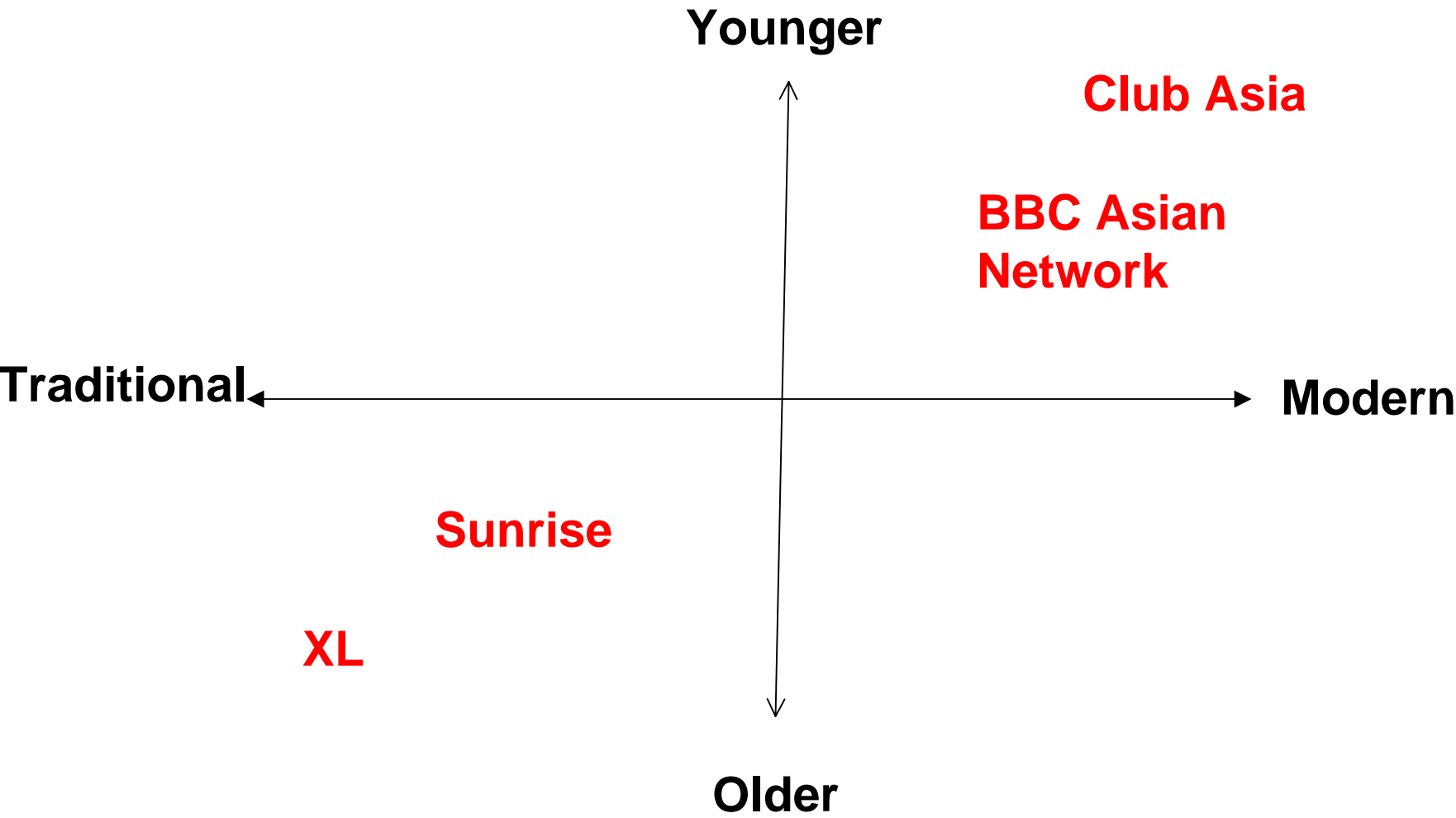
# Asian Listening Needs

- Culturally relevant music: latest Bollywood and beyond
- Information and discussion – culture specific and non specific issues
- Local, national and international news
- Entertainment and stimulation
- ‘Emotional’ involvement in presenters (older)
- Reflection of cultural values (older, female)

# Competition

- Key perceived competitors:
  - London: Sunrise, Club Asia
    - Little mention of Spectrum
  - Birmingham: XL, (Sunrise)
- Greater differentiation made between BBC Asian Network and its competitors cf. 1Xtra in terms of
  - Target audience
  - Style, ‘feel’
  - Content
- Choice largely determined by:
  - Familiarity and habit (older, more traditional)
  - Ability to access via non-traditional media

# BBC Asian Network vs. Competitors



# Sunrise



- Oldest, most established and well known
- Familiar, tried and tested: formats, presenters, content
- 'Safe': discussions, tone etc.
- Specific language programming
- Bollywood connections
- News in Hindi/Urdu
- 'Local' community feel



- Old fashioned, out dated
- Traditional, orthodox
- Unprofessional
- Traditional stance of discussions
- Down market

# XL



- Good range of music
- Latest music
- Delivery in Hindi/Punjabi
- Local focus: information, news, advertising



- Traditional, orthodox
- Down market
- Poor quality, less professional (presenters, how issues are handled etc.)
- Too 'desi': therefore for older generations only

# Club Asia



- Young, vibrant
- Hip trendy music
- New young British Asian talent
- English and Asian music
- More underground Asian sounds



- Music too trendy, too niche
- New, therefore, less experienced
- Too much bhangra, not enough variety

# Quotes

***“Club Asia is a sort of Kiss radio station.”***

***“Club Asia have taken the teenagers away from Sunrise.”***

***“Everybody listened to Sunrise no matter who you were.”***

***“Sunrise...you understand exactly their themes, the programme’s style.”***

***“XL is so desi-fied, it’s so orthodox.”***

***“Club Asia is the Ibiza teenager, Sunrise the grand-dad and BBC Asian Network the young professional.”***

***“I’ve tried other stations but I know Sunrise.”***

***“XL does play the latest Indian tracks.”***

# BBC Asian Network: Overview

- Perceived as more contemporary than longer established Asian stations such as Sunrise, XL
- Greater appeal for young British Asians
- Already established in Birmingham on analogue but becoming better known in London
- In London:
  - 2/3 current listeners in each group
    - Mainly younger Asian women and less traditional older men and women
  - Access mainly via internet and to lesser extent, digital TV

# Overview Cont'd

- Initial awareness through marketing esp. on BBC after Eastenders
- In Birmingham:
  - Older listeners since station started
  - Although mainly on analogue on the move and at home, increasing access through digital TV and online at work
- Similar responses by current listeners and non listeners
- Non listeners:
  - Tend to be impressed by the station's output.
  - Main barrier for them is lack of analogue: station is not front of mind
  - Older women: less likely to access non-analogue
  - Younger men less interested in Asian stations

# BBC Asian Network

- ✓
- Younger, more modern but appealing to range of ages
- Professional, high quality: presenters (esp. Sonia Deol), news, current affairs, discussions
- News very much in the BBC style: high quality, good reporters
- Issues discussed: good range, contemporary, relevant, more 'edgy'
- Well researched issues
- Broadcasting in English but specific language output also
- Range of music genres
- Web site
- Well marketed

# BBC Asian Network

**x**

- Scheduling and quality of specific language programmes
- Not consistent quality of presenters
- Not always the latest Asian sounds
- Lack of community feel: local events, news (Birmingham)

# Quotes

***“BBC Asian Network is a radio station which was brought out for the generation of Asians that grew up in this country. Sunrise was made for the generation that immigrated to here, but they know now there’s a new generation...who are here to stay.”***

***“It’s more trendy, more Anglo-fied.”***

***“I thought it would be another Sunrise. The content, I was quite amazed with because it was quite international in terms of news, sports and music.”***

***“It feels like it’s from London, they don’t really do much about local things.”***

***“You’d expect it to be of a high standard, maybe they’ve got more options open to them.”***

# Attitudes to Speech Segments

- Unlike African Caribbeans, Asian sample spontaneously mention discussions and current affairs
  - Enjoyed by all except some younger men
  - Older men are listening to other talk radio stations
  - Younger women like range and relevance of issues
  - Older women enjoy style of presenters esp. Sonia Deol
- Amount of speech less problematic
- **Quality of speech segments is a definite differentiator**
  - Issues covered: not stereotypical, more controversial
  - More relevant to younger listeners
  - Issues, callers, well handled by presenters
  - Issues covered in depth

# Quotes

***“Sonia Deol sounds good on the radio. She appeals to all generations, she’s a cut above the rest.”***

***“There’s always something on that affects you.”***

***“The presenters know how to handle phone ins. Someone swore the other day and Sonia handled it really well.”***

***“Most of the presenters sound English, they speak really well, like us.”***

***“They’re younger presenters. The music’s a lot better...you can call in and discuss what you want. So it’s not just one topic like on Sunrise, they discuss everything.”***

# Added Value

- BBC Asian Network does benefit from positive values respondents attach to the BBC in general:
  - Professionalism, vigour
  - High quality news and current affairs
  - In depth discussion and analysis
- These are seen to be reflected in BBC Asian Network's output and are considered important differentiators
- These are values not associated with its main competitors. While other stations do provide news and debate they are not seen as effective
- Also, the station's value is that it reflects British Asian values
- As with 1Xtra, BBC Asian Network is seen as important in providing:
  - Choice
  - Targeted services – justifies licence fee

# Extent to which remit is met

Requirements	Met?	Level of Importance
English and language programmes	✓	?
News, current affairs, debate	✓	✓
Sports	?	?
Audience participation	✓	✓
Wide spectrum of music	✓	✓
50% speech	✓	✓ ?
Meet needs of wide range of Asian communities	✓	✓

# Extent to which remit is met

- Some respondents felt that the station's remit is too wide, that it is trying to do too much
- It's image of a more professional, contemporary station does not fit well with specific language programmes
  - Only relevant and of interest to older, more traditional listeners
  - Most younger Asians prefer/only understand English language broadcasting

# Summary

- Increasing awareness of BBC Asian Network in London via digital services, although this is, in the main, online and digital TV
- However, there is little up take of DAB
- Marketing campaigns have been successful in generating some awareness
- BBC Asian Network is seen to be different from its commercial counterparts in overall image, style, content (discussions)
- Seen to be from the BBC stable in terms of quality of broadcasting, news and current affairs and this is valued
- However, for some, targeting is confusing: modern, British Asian OR older, more traditional? (English vs. language programmes)

# Summary Cont'd

- Potential listeners positive to the station's output and the station is seen as relevant and of value to most
  - Need to continue to promote multi media access
- Older, more traditional respondents in London likely to continue to prefer Sunrise
- Opportunity to build on the BBC's public service differentiation in terms of:
  - Promoting more community and social care initiatives
  - Using well known personalities in charity/social care initiatives

# Summary Cont'd

- Initiating social care, charity initiatives which are of interest to Asians e.g. plights from 'back home' etc. with key personalities
- Including controversial, interesting issues to remain contemporary and leading edge
- Being innovative, develop new ideas re: content e.g.:
  - More classical Asian music
  - Asian arts, plays etc.
  - Raising station's profile and key live events

# Quotes

***“It needs to get into the community, get out there.”***

***“They shouldn’t be afraid to try new things that should normal for them. They’ve got good presenters but they shouldn’t be afraid to pull them and try someone new or change the slots.”***

***“There should be more cultural stuff, classical music, plays, comedians.”***