



# Radio: latest audience research findings

Results from two surveys investigating listeners'  
attitude towards radio

Statement

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## Section 1

# Executive summary

## Ofcom has conducted two research surveys into listeners' attitudes towards radio, and local radio in particular

- 1.1 Ofcom has the following broad duties in relation to radio broadcasting:
  - Promoting the interests of citizens and consumers;
  - Securing the availability throughout the UK of a wide range of radio services which (taken as a whole) are both of high quality and calculated to appeal to a variety of tastes and interests, and;
  - Securing, to the extent that we consider appropriate in each case, that local analogue commercial radio stations broadcast programmes which include local material, and that a suitable proportion of such programmes are locally-made.<sup>1</sup>
- 1.2 Ofcom is required to draw up guidance as to how we consider the last of these requirements should be satisfied. This 'localness' guidance can be found at <http://stakeholders.ofcom.org.uk/broadcasting/radio/localness/localness-guidelines>.
- 1.3 These localness guidelines were significantly amended in 2010 to allow local analogue commercial radio stations greater leeway to share programmes, and co-locate, with other stations, and greater flexibility in the extent to which stations are required to provide local material and locally-made programmes. This has resulted in local station operators taking different approaches to local news and information provision, and hours of local production.
- 1.4 For example, networking has become far more prevalent, and some operators have also chosen to significantly reduce the length of local news bulletins.
- 1.5 Ofcom commissioned consumer research (both quantitative and qualitative) to help it understand any impact of these changes on audiences, and also to understand the role that radio serves for listeners, which elements are particularly valued, and which continue to be served uniquely by this medium.
- 1.6 In the broadest terms, the key objective for the research was to help Ofcom understand whether the public purposes which radio has traditionally delivered continue to be valued by listeners in the digital age, both from a consumer and a citizen viewpoint<sup>2</sup>, and also to test current public satisfaction with local news and other content on local radio given the recent changes in this area.
- 1.7 The findings show that the public purposes of radio identified in 2005 remain and still hold value for listeners. They also show that local content is still important to, and valued by, listeners, who are generally satisfied with the current levels being delivered. In addition, our measures to allow greater networking and programme sharing whilst decreasing the number of hours of locally-made programming required to be provided outside of peak-time listening appear to have struck the right balance.

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<sup>1</sup> See section 314 of the Communications Act 2003.

<sup>2</sup> A summary model of radio's public purposes was produced as part of the output of a research study commissioned by Ofcom in 2005, and we use this as a point of reference for the current study.

Respondents in our research were satisfied with their current provision of local time-critical content, and felt that local programming was most important at peak times and that it was important for presenters to be locally-based at key times of day.

- 1.8 The two consumer research reports – *Radio: The Listeners' Perspective* and *Attitudes towards local radio* – are being published alongside this summary document.

## Section 2

# Main findings

## Purpose of the research

- 2.1 We sought to understand firstly whether our established public purposes of radio (determined by our research in 2005) still held true in 2013, in light of the increasing importance of digital distribution and an increase in competing sources of music and other types of content provided by radio services.
- 2.2 Secondly, in the context of our reduction in localness regulation in 2010 and a keen uptake of networking and programme sharing within the industry, we also wanted to test public satisfaction with local news and content on local commercial radio.

## Methodology

- 2.3 We used two separate research approaches to answer the above objectives, both with slightly different audience profiles and focus.
  - i) Qualitative research: Workshops conducted with a sample of **'regular' radio listeners** (to both national and local stations). Six workshops in total involving c. 24 participants in each location (Birmingham, Durham, Edinburgh, Plymouth, Cardiff, Belfast). The key objective was to establish whether what were traditionally seen as the public purposes of radio continue to be valued by listeners in the digital age. It also investigated attitudes towards local news and information as well as awareness and expectations regarding networking across commercial stations.
  - ii) Quantitative research: Face-to-face survey among a representative sample of **listeners to any local radio** across the UK aged 16+ (base size 2,434). The overall aims were to understand the value of local news on radio and the satisfaction with the current provision.
- 2.4 The two consumer research reports – *Radio: The Listeners' Perspective* (summary of the qualitative research) and *Attitudes towards local radio* (summary of the quantitative survey) – are being published alongside this summary document.

## Main findings

### Radio's enduring strength remains and listeners' relationship with radio remains in good health

- Radio is considered to be an accessible medium, on a ubiquitous platform; a dependable companion; a deliverer of timely national and local information; and a source of a variety of entertaining and stimulating music and speech. These qualities are felt to have endured both over time and in relation to other media, whether traditional or new.
- There is however evidence from the qualitative research that radio is being challenged by digital and mobile media in two specific respects: firstly, as the primary source of music (especially amongst younger audiences); and secondly, as the unique medium for instantaneous news delivery for both local and

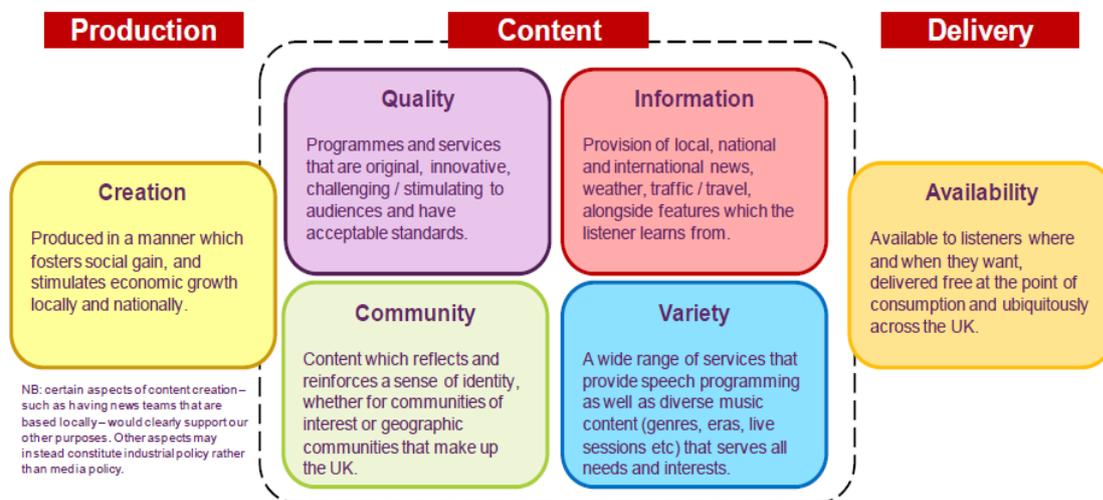
national/international news, whereby listeners claim that the internet has superseded press and lies just behind TV and radio as a news source.

- However, the qualitative research also confirmed that as well as being a threat, new technology and media consumption behaviours have also enhanced radio's position by extending access and offering increased station and genre choice.

### Radio's key public purposes established in research in 2005 are still applicable today

- The qualitative research established that the public purposes of radio identified in 2005 remain and still hold value for listeners.
- Radio's accessibility/availability, music variety, presenters, news/information and key local information are considered particularly important.

### Summary of public purposes of radio, 2005



- The attributes felt to be uniquely delivered by radio can be grouped into:
  - accessibility (free, ease of audio, choice of background/foreground listening),
  - music variety and specialism (different eras/genres, specialist music, old/new);
  - listener interaction (presenters, DJs, competitions, phone-ins, debate);
  - immediacy of information (up-to-the-minute UK and local news); and
  - local content (local traffic and weather, local news, local ads and deals, discussion of local issues).
- Accessibility is not only considered to be unique to radio, but it is also seen to underpin radio's various content-based attributes.
- Listeners' preferences and priorities regarding radio's content-based attributes can be seen to vary considerably by age and lifestage, but the qualitative research showed little difference by location. On a content basis (in a very general order of stated importance) music is the key driver, followed by entertaining, interesting or informative speech output delivered by engaging presenters; up-to-date news; and local travel, weather and news bulletins.

- On a societal level, listeners prioritise radio’s capacity to serve and support individuals or groups within society, particularly the needy or isolated, as it offers company, connection, information and stimulation, all delivered by the platform’s universal attribute of easy access, wide reach and instantaneity.

### Local content is still important to, and valued by, listeners

- The qualitative research indicated that local content is considered important to radio listeners. Regarding local output specifically, listeners placed highest importance on local traffic, travel, weather and news bulletins. This was particularly true of those who drive or commute regularly or those with children in local schools or jobs in the local community. Other longer-form types of local output such as discussions, phone-ins, or competitions were less important but are seen as underpinning the public’s strong relationship with radio.
- The bespoke quantitative survey we commissioned as part of this work included local radio listeners only. 54% of local radio listeners claim that local commercial radio is important to them, while 50% claim that BBC local radio is an important local medium.
- The bespoke quantitative survey also identified local radio as the most used source for traffic and travel reports, and over half of local commercial radio listeners say they use those stations for local news. Again, when explored in more detail in the qualitative research, key traffic and travel information, and any important local news stories, were considered to be delivered in sufficient detail but without disturbing their main reason for listening.
- As found in the qualitative research, music is the key driver for listening to most local commercial stations. In addition, the quantitative survey identified local news as the next most valued type of content followed by weather and traffic reports. For BBC local radio listeners, however, local news is the most valued content type followed by weather updates.

### Content valued on local radio, 2013

#### Local commercial radio

Rank	Content	% Value
1	Music	83
2	Local news	45
3	Weather	35
4	Traffic & travel	34
5	Entertaining presenters	26
6	Local events & entertainment information	23
7	Discussion of local issues	22
=8	Local presenters	20
=8	UK / international news	20
10	Sport	19
11	Opinions on local issues	16

#### BBC local radio

Rank	Content	% Value
1	Local news	61
2	Weather	46
=3	Traffic & travel	40
=3	Music	40
5	Discussion of local issues	36
6	Local events & entertainment information	32
7	Sport	31
8	Opinions on local issues	25
9	Local presenters	22
=10	Entertaining presenters	21
=10	UK / international news	21

Source: Ipsos-MORI

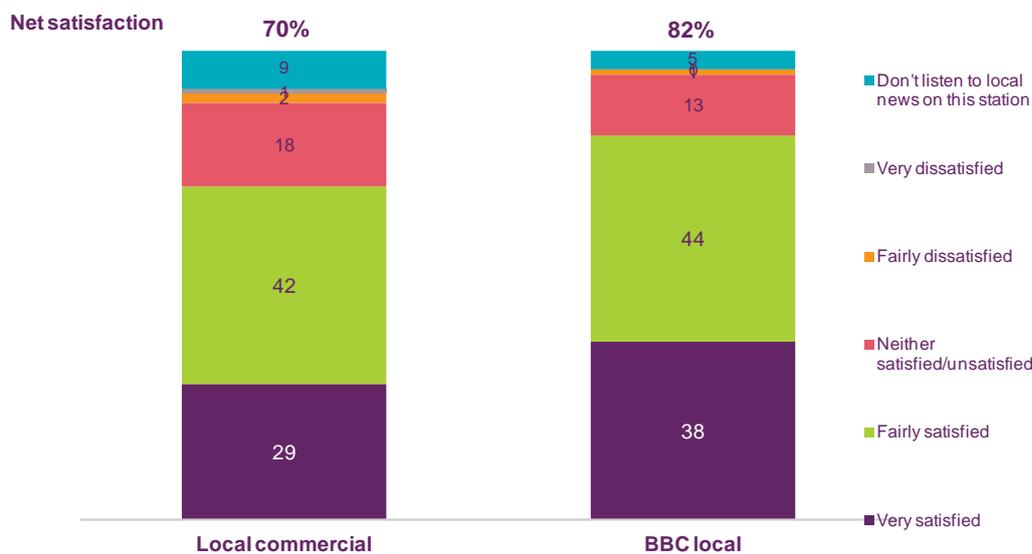
Q9: Which, if any, of the following do you particularly value on <local radio station>?

Base: All who listen each month to: local commercial radio (1984); BBC local radio (1079)

## Listeners are generally satisfied with local content delivery on local radio

- The bespoke quantitative survey also found that the majority of listeners to BBC local radio and to local commercial radio are satisfied with the way their stations cover local news. When explored in the qualitative research, local commercial radio listeners explained this satisfaction derives mainly from the short and frequent local bulletins which align to their needs.

### Satisfaction with coverage of local news by local radio listeners, 2013



Source: Ipsos-MORI

Q10: Overall, how satisfied are you with the way in which <local radio station> covers local news?

Base: All who listen monthly to: local commercial radio (1984); BBC local (1079);

- In addition, over two-thirds of local commercial listeners (67%) agree that their station is good at covering local news stories that matter to the area.
- The role of local news on local radio is vital to many, as over half of local commercial listeners (56%) say they rely on their station to keep them updated with local headlines. This is particularly strong among those in lower social grades, and also with older listeners.
- By way of context, RAJAR analysis shows that 51% of the population listens to local commercial radio and, of these, 83% do not listen to BBC local radio; these figures are stable over time.
- Considering listeners to specific commercial radio "brands"<sup>3</sup>, almost half (48%) of listeners to a UKRD-owned station and 46% of Real Radio listeners say they value local news on their station, compared with 30% of listeners to Capital stations. Similarly, 40% of listeners to a UKRD station value traffic and travel updates on their station, compared with 38% of Real Radio listeners and less than one in four (23%) Capital listeners.

<sup>3</sup> In this context, "brands" also includes groups of co-owned but not commonly branded stations.

## **Broadly, listeners feel that locally-based presenters add credibility to delivery of local content**

- The quantitative survey found that over half of local commercial radio listeners say it is important that their local station has presenters who are based in the area during the breakfast show, and just under half said it was important to have local presenters during the afternoon drivetime slot.
- The qualitative sessions generally concur with this finding, as many believe that a presenter rooted in their community, with local knowledge, is best placed to present local information in a credible way, although some felt that local provenance and accent assists in delivering relationship-based and longer speech content.
- When discussed in more detail, many listeners, including those who regularly listen to networked commercial stations, claim to be unaware of the practice of networking on commercial radio. This is at least in part due to the majority of the sample being peak-time listeners and thus not necessarily exposed to networked output
- Once informed of the practice, listeners tend to take a pragmatic stance, declaring they are satisfied so long as their basic need for short and frequent local news and information bulletins is met.

## **When discussing potential future changes, listeners generally feel the status quo meets their requirement**

- The qualitative research introduced discussion of several potential scenarios representing different levels of networking and local content delivery on commercial radio in the future to gain an understanding of people's preferences. Whilst it is difficult to accurately gauge reactions to potential change, the research participants tended to prefer the status quo: local programming and presenters during peak time, with networked output on some stations at other times, while keeping short and frequent local news and information bulletins.
- Faced with a scenario whereby key local output at breakfast and drive-time is removed, but short frequent bulletins are retained, listeners who feel closer to local presenters and discussion of local issues showed concern. Others, however, felt that such a scenario would not significantly affect their current satisfaction with local commercial radio output. A scenario whereby all local output is given over to the BBC is, however, generally felt to be a step too far.