



MORI

## Radio – Preparing for the future

**Phase 1: Developing a new framework**

### Appendix B: Results of audience research

**Research Study conducted by MORI  
on behalf of Ofcom**

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# Appendix B: Results of audience research

## B1 Executive Summary

### Key Questions

Ofcom commissioned MORI to inform three key topic areas of Ofcom's Radio Review. The key questions within each topic area are summarised below:

- **Current Trends**
  - the role of radio in people's lives;
  - to understand listening patterns, such as where radio users listen, what they listen to and when they listen; and
  - audience perceptions of current radio provision including satisfaction levels and possible improvements.
- **Localness**
  - to understand the importance of localness to listeners – and how they define the concept;
  - the role of radio in the provision of localness versus other media;
  - audience satisfaction with current local radio services; and
  - thoughts on specific issues such as news compilation and location of local stations.
- **Digital Radio**
  - to gain an understanding of awareness, knowledge of and interest in digital radio;
  - key drivers of adoption and current usage trends amongst adopters; and
  - barriers to adoption and the likelihood of take-up amongst current non-adopters.

### Key Findings

#### The Role of Radio

- Radio is essentially used as a passive medium, listened to while doing something else. Despite this, people consider radio to be an important and relevant medium and have strong opinions on both positive and negative aspects of radio. Overall, there is substantial satisfaction in the current provision of radio services.
- Radio performs many functions including acting as company for people, alleviating the boredom of mundane tasks, and contributing and impacting on mood. Radio can also often be an alternative to other forms of entertainment.

## Radio – Preparing for the future

*"I find radio can change or enhance your mood. I used the example of getting ready to go out on a Saturday evening or it's nice to have some nice relaxing music as you go to bed."*

Manchester, DAB Group

- Radio is an important connection with the outside world on both a local, national and global level. It allows people to keep 'in touch' with unfolding news, traffic, weather, sports, and new music trends.
- There are some negative aspects to radio: it is sometimes felt to have too much advertising and too much repetition in terms of both the music played and news bulletins.

*"When you hear the news, and you hear something which you've heard half an hour before, that's when you turn to the control."*

Male, Colwyn Bay

### Current Trends in Radio Listening

- Most people in Britain (87%) listen to the radio, with almost 86% of these listeners ever having tuned into BBC stations, compared with 71% for commercial radio. The audience for commercial radio is younger than that of BBC Radio. Reach among residents in the home nations to their national BBC Radio station is higher than that of any of the English regions to a local BBC station.
- More than two-thirds of radio listeners tune in on a daily basis, with a further quarter doing so on between three and six days per week. However, listeners can be fickle, with just 14% of radio listeners tuning into local BBC stations daily and 20% doing so to local commercial stations.
- Over half of listeners tune in while getting up or having breakfast. Two-fifths listen to the radio travelling to or from work and around three in five say they listen during the day either at home or work.

*"It's a great way to start the morning!"*

Female, Stirling

- A minority of around one in five chooses to listen to just one station during an average week, while around half choose three or more. People have a limited sense of loyalty to radio stations and are willing to switch between stations to find other programmes or music.
- More than eight in ten listeners state that the music and records played are of importance to them in choosing a radio station. Keeping abreast of news is also important to listeners, at both a national and local level. Local radio services such as local traffic and travel information, local weather forecasts and issues affecting the local community are also considered important.

### Localness

- Localness is a difficult concept for people to think about and articulate. Rather than focusing on a geographically defined area, localness means different things to people depending on their situation and the context of the discussion.
- There are a number of factors that constitute localness. These include **shared humour** and **common interests** between people; **shared geography** and **focal points**; the **length of time** in an area; people's own **personal history**; the **accessibility** of surrounding areas; the location of

**family and friends**; place of **work**; and level of **rurality**. People often talk about how they belong to their 'local area' with a sense of pride and happiness.

*"The sense of humour here is quite different, and doesn't travel well – but we like it."*

Female, Belfast

- The local press, both paid-for and free, are the most frequently used source on information on issues within the boundary of nearby towns. When widening the geographic area, there is less reliance on local press, although paid-for newspapers remain a key source for many seeking information at a county level. Beyond the county and through to the national level, television becomes an increasingly important source of information.

*"For me, I think if I can see local events in the local paper, I'll cut it out and make a note of it, but if it's on the radio, you might miss it."*

Male, Stirling

- Local or national radio does not feature as one of the top two sources of information on a range of localities respondents were questioned about from 'the neighbourhood' to the UK. This backs up the hypothesis that, while a certain level of content is expected of radio, it is the style of the programmes which actually attracts listeners.
- Although localness, in general, is a difficult concept for people to think about, localness in radio proved to be an easier topic for respondents to discuss.
- Satisfaction is lower with local radio than for the radio overall, although around half (51%) are satisfied overall with local provision. The three issues which are considered most important to be covered by local radio (**news; traffic and travel; and weather**) are also those which listeners are most satisfied with. Community issues and local events, both also considered important, are also among those issues with which listeners are most satisfied.
- A segmentation analysis was conducted to develop population clusters, based upon their view on issues surrounding localness and the use of local radio. Six clusters were identified:
  - The Community Cohorts – living in a town or city. Community Cohorts are strong supporters of local radio and believe that local issues should be covered by local radio stations, which should be based in the area in which they broadcast.
  - The News Junkies – Male dominated, high income cluster which is more likely to listen to national radio. Although they have little interest in local issues they believe, on a citizen level, that local issues should be covered by local radio.
  - The Disengaged – Likely to include young men from the DE social grades, this cluster is uninterested in local issues and has little local identity.
  - The Well-informed – Likely to include older listeners, this cluster is interested in local issues but does not have a strong local identity, nor listens to local radio with listening dominated by BBC stations.
  - The Rural Community – Living in the rural community members of this cluster have a strong local identity and are interested in local issues which should be covered by local radio.

## Radio – Preparing for the future

- The Entertainment Seekers – With a high proportion of young women, members of this cluster are most likely to be listening to the radio for entertainment and although they believe local issues should be covered on local radio, they do not feel they have a local identity.
- There were respondents in the radio workshops who believe that it does not matter where the news is compiled, as long as it is relevant and read by a person with local knowledge. However, others feel strongly that presenters should be based in the local area so as to have an emotional connection with listeners. Whatever view is held, it is of particular importance that names and places are pronounced correctly by presenters.
- The quantitative study demonstrated a clear difference in the importance listeners place on how the news is **compiled**, with the majority saying it is important that **news reporters** are based in the local area, and how the news is **presented** – 71% agree with the statement ‘*If local news is covered, I don’t care where the **news reader** is*’.
- People often like hearing about areas with which they are familiar. As such, having representatives from the local station visible around the local area is seen as a good way of providing an ‘emotional connection’ between the listener and the station.

*“Your local presenter should speak in a local accent. They know the area and know what the people are looking for.”*

Female, Stirling

- There were suggestions of things that local radio could do more of, such as showcasing and promoting local talent; broadcasting more news about local events; encouraging more participation from the local community; and broadcasting services for specific audiences such as children and women.
- There are mixed views on whether there should be more community involvement in local issues and decisions about policy. Some older participants believe this would be a good idea, for example hearing about local council decisions and its likely impact, although others think it would lead to very boring radio.
- People have a negative image of community radio, describing it as unprofessional, un-dynamic, and boring. Producing radio is seen as something which should be done by professionals.
- Earlier this year Ofcom conducted research amongst listeners, station participants and community leaders in a selection of areas where pilot community radio stations have been in operation for over 2 years. Results of the study suggest there is a high level of satisfaction amongst the target market in these areas with both those listening to, and participating in, community radio saying it enhances their personal well-being and sense of community.

## Digital Radio

- Almost six in ten (57%) have accessed digital radio through any platform such as the television or internet. Digital radio stations on the television are accessed while channel hopping through the television channels or, as with

radio generally, in the background when doing other tasks such as the housework, work etc.

*"I put the radio on through my Sky and do the housework."*

Female, Oldham

- There is high awareness of the term 'digital radio', although few radio listeners claim to know much detail about digital radio and presume it to be of better quality than analogue radio. Awareness of the term 'DAB digital radio' is much lower with a little over half of all radio listeners (56%) aware of the term. Indeed, there is some confusion over what DAB units actually are.
- Non-users see digital radio as not yet established and quite a niche product. Both users and non-users feel there is a distinct lack of clear advertising of the features or benefits of digital radio and DAB sets. Lack of awareness, perceived lack of need and cost are the key barriers to uptake of a DAB radio, and there are no substantial plans among analogue listeners to access digital radio through either internet, digital TV or a DAB set.

*"My dad's got a radio that's about 25 years old, but it still works and as long as it works, he doesn't care. It's huge and covered in paint."*

Male, Watford

- 47% of digital users cite better sound quality as the most important advantage of listening to digital radio (rising to 56% amongst DAB users) with the increased choice, content and diversity of the channels also mentioned.
- Four in ten DAB users listen to the radio more after first accessing digital radio, with more than half (61%) listening to new stations and more stations (57%). The listening experience is considered as more pleasurable due to the increase in sound quality, the increase in choice and variety of channels and the ease of use of the sets.
- There is a perception from both DAB and non DAB users that the price of sets will fall further in the future. Among both groups, there is limited interest in purchasing a set until the price falls below £60.
- Without increased promotion on the part of both manufacturers and retailers, identifying the benefits of digital radio over analogue services and the benefits of the investment required in new equipment, it is unlikely that uptake will rise sharply in the next twelve months. Word-of-mouth will also be an invaluable aid to the marketing of digital radio and DAB sets, as DAB set users are almost 'evangelical' about their sets.

*"I couldn't listen to a normal analogue radio after that. It just, it said, look, buy me now. It reminds me of when a guy came to our house once and was selling us a Hoover, years ago. He cleaned a little spot there, so you had to buy it."*

London DAB Group

## Radio – Preparing for the future

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## B2 Background and objectives

### Background to the Review

Ofcom is carrying out a review of radio provision and consumption comprising several elements of work. This includes:

- A review of the progress made to date in the digital radio market for the Secretary of State; and
- A review of “localness” in relation to radio.

Ofcom has identified that as little research exists on these topics, there is a need for evidence-based understanding of the radio audience and its current perceptions and behaviours and indicators as to how these might change over time.

As part of its charter, Ofcom is required to provide guidance on ‘localness’ to local commercial radio broadcasters in general; and ensure local content is available and that the character of radio stations is appropriate as part of the radio licensing process. Hence it is critical that Ofcom understands both the concept and importance of localness in radio and what it means both to listeners and to broadcasters.

With regard to digital radio, Section 67 of the Broadcasting Act 1996 requires the Secretary of State to keep under review the development of digital radio, for the purpose of considering for how long it would be appropriate for sound broadcasting services to continue to be provided in analogue form. The Act requires the review to look at:

- the provision in the UK of radio multiplex services;
- the availability in the UK of digital sound programme services and existing analogue services in digital form and the sound broadcasting services of the BBC;
- the ownership or possession in the UK of equipment capable of receiving digital sound services; and
- the likely future extent of such provision, such availability and such ownership or possession.

### Research Objectives

Ofcom commissioned MORI to inform three key topic areas of Ofcom’s Radio Review:

- **Current Trends.** To understand listening patterns, such as where radio users listen, what they listen to, when they listen and on which platform. In particular Ofcom wanted to focus on audience perceptions of current radio provision including satisfaction levels and possible improvements;
- **Localness.** To understand the importance of localness to listeners, the role of radio in the provision of localness versus other media, satisfaction with current local radio services and how listeners think ‘localness’ should be delivered; and

- **Digital Radio.** To gain an understanding of awareness, knowledge of and interest in digital radio, including current levels of take-up, trends in usage, key drivers of adoption, barriers to adoption and the likelihood of take-up among the general population.

The research programme provides a deeper understanding of consumer behaviour and issues across these three areas through qualitative work and robust and representative data on the UK radio market, through quantitative data.

### Methodology

As stated above, the devised methodology employed a multi-method approach:

#### Qualitative Research

The qualitative research consisted of, firstly, extended focus groups in a **mini workshop format**. This allowed for detailed examination of all relevant issues in a consultative format, as well as the inclusion of a wide range and diverse profile of participants in six different types of locations. Locations were chosen to include both urban and rural areas, and representing all of the nations in the UK. Each mini-workshop was held with 15-18 people, which individually broke into two or three groups at various times throughout the session and also worked together in plenary. Discussion covered views about current radio provision, views on localness and local radio and views about digital radio. The following table shows the composition of each workshop:

Location	Location specific profiles	Demographic profiles	Radio Listening patterns
Watford	Mix of those moved to Watford to commute and those born in Watford		<ul style="list-style-type: none"><li>• All radio listeners</li><li>• Mix of heavy / light listening patterns</li></ul>
Nottingham	Ethnic mix Rural / urban mix	<ul style="list-style-type: none"><li>• Mix of gender</li><li>• Mix of ages from 21-65 years</li><li>• Mix of life stage and family status</li><li>• Mix of social grade</li><li>• Mix of working / non working status</li></ul>	<ul style="list-style-type: none"><li>• Some in each location who listen to local</li><li>• Mix of local / regional /national radio consumption</li><li>• Mix of BBC / commercial radio listening habits</li><li>• Some in each who listen to digital radio through TV, internet or DAB sets</li></ul>
Oldham	Ethnic mix		
Belfast	Catholics and Protestants mix		
Stirling	Rural / urban mix		
Colwyn Bay	Rural / urban mix Some Welsh speakers (also English speaking)		

In addition to the workshops, we conducted two traditional **discussion groups among DAB users**. DAB users are a small proportion of the total population and so it was unlikely that a significant number would be present in the workshops. In

addition, DAB set users are quite different from the general population and so required exploration independent from the workshops. The topics covered in these sessions were: DAB usage, drivers for purchase, the role of local provision in usage and interest in local radio.

### **Quantitative Stage**

The qualitative research informed the **quantitative stage** in terms of language and topic coverage. This phase of the research provides Ofcom with robust measurements to complement the more in depth understanding achieved by the qualitative phase. The quantitative questionnaire was both designed and piloted after the qualitative phase. The 26.5 minute questionnaire was conducted via CATI (Computer Assisted Telephone interviewing) and was asked of 1,501 radio listeners aged 16 and over from across the UK. The questionnaire examined the following areas: media consumption – both national and local sources, radio listening trends – both national and local, satisfaction with current provision, perceptions of localness, interest in local issues, desired local radio features, awareness of digital radio, use of digital radio – via DAB sets, internet, TV and likely take up of DAB radio sets at various price points.

1,000 interviews were conducted in England, 200 interviews in Scotland, 151 interviews in Northern Ireland and 150 interviews in Wales. Data are weighted by region, gender, age and social class to reflect the known population of radio listeners.

At the analysis stage, MORI undertook factor and cluster analysis to develop distinct population clusters, based upon their view on issues surrounding localness and local radio use. Six clusters were identified, and a short summary of each follows.

#### **Cluster One – The Community Cohorts** (18% of the population)

*Likely to be living on the outskirts of a town or city, this cluster is particularly interested in local issues. They are strong supporters of local radio, believing that local issues should be covered and that 'local' radio stations should be based in the area in which they broadcast. They are more likely than the other five clusters to listen to local radio, and they listen for longer in an average week. Those in this cluster are more likely than others to be aged between 35 – 54, to be of C2 social grade and have an average household income. They are more likely to be in a household with two-adults, aged under 60, or in two-parent families.*

#### **Cluster Two – The News Junkies** (18% of the population)

*Likely to be from social grade AB, this male-dominated, high-income cluster is more likely to listen to the radio while travelling in a car, with BBC Radio 4 being their station of choice. They are more likely to listen to national radio, with commercial radio listening also featuring highly in their listening. News Junkies have little interest in local issues, with the exception of local politics, but have a citizenship view of local radio, as they believe that local issues should be covered by local radio.*

#### **Cluster Three – The Disengaged** (12% of the population)

*Likely to be young men from the DE social groups, members of this cluster are more likely to be living in large households and in an urban centre. This cluster is uninterested in local issues and has little local affiliation or identity. Their media consumption is dominated by tabloid newspapers and BBC Radio 1.*

**Cluster Four – The Well-informed** (19% of the population)

*Likely to be aged 55 and over, from the C1 social grade, this cluster, although interested to some extent in local issues, doesn't have a strong local identity, nor listens to local radio. They are more likely to listen to the national BBC stations, BBC Radio 2, 3 and 4 and less likely to listen to commercial stations. This cluster is also likely to read broadsheet newspapers.*

**Cluster Five – The Rural Community** (9% of the population)

*Living in a rural community, or small village, members of this cluster have a strong local identity and are interested in local issues and strongly believe they should be covered by local radio. Members of this cluster listen to BBC local stations, but also to talkSPORT and BBC Radio FIVE LIVE. They are likely to listen to the radio in a wide variety of situations, travelling to and from work, at home and work during the day and at home during the evening. Members of this cluster are likely to work full-time and live in households with two adults, aged under 60.*

**Cluster Six – The Entertainment Seekers** (24% of the population)

*The largest cluster, with a high proportion of women in the 25 – 34 age group, members of this cluster are most likely to be listening to the radio for entertainment. Although both interested in local issues, and believing that they should be covered on local radio, members of this cluster do not consider themselves to have a local identity. They are more likely to listen to BBC Radio 1, and both national commercial radio (particularly Virgin Radio), and local commercial stations. This cluster watches a lot of television, read mid-market, local and regional press and are likely to read magazines.*

Throughout the report, differences by cluster are reported where they exist. Further detail about how the analysis was undertaken can be found in the appendix to this report.

## Interpretation of the Findings

**Qualitative research** is designed to be illustrative rather than providing statistically representative data. It should also be remembered that throughout this report the qualitative insights record perceptions, not facts. Participants may hold views based on incorrect information and it is these perceptions that are reported here.

For **quantitative elements** of this project, it should be remembered that a sample of, and not all, radio listeners in the UK has been interviewed. Consequently, results are subject to sampling tolerances, which mean that not all differences are statistically significant. **An explanation of statistical reliability is contained in the appendices.**

Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of “don't know” categories, or multiple answers. Throughout the volume an asterisk (\*) denotes any value of less than half a per cent, but more than zero.

In the report and computer tables (provided under separate cover), reference is made to “net” figures. This represents the balance of opinion on attitudinal questions, and provides a particularly useful means of comparing the results for a number of variables. In the case of a net satisfaction figure, this represents the percentage satisfied on a particular issue or service, less the percentage dissatisfied. For example, if a service records 40% satisfied and 25% dissatisfied, the net satisfaction figure is +15 points.

## **Publication of Data**

As with all MORI studies, findings from this survey are subject to the standard Terms and Conditions of Contract of MORI and Ofcom. Any press release or publication of the findings requires the advance approval of both parties. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

### B3 The role of radio

Among listeners, radio plays an important role. It is also a variable role, as the radio plays a different function for an individual listener according to time of day, their mood or need for entertainment. In the qualitative workshops and focus groups, the role of the radio was discussed to provide the context in which radio listening habits can be explored and understood. The main functions that the radio performs include:

- **As company.** Participants report that listening to the radio is often a solitary activity for example, to alleviate silence when driving or doing the housework and many appear to develop a personal relationship with the radio. Some older respondents who live on their own particularly value radio for this function;

*"It's like having somebody else sitting there as company as well, isn't it, in the car when you're on your own."*

Male, Watford

- **Is interactive.** Although radio is felt to be a passive medium, as it is often listened to while doing something else, participants reveal how they interact with certain programmes by laughing along with and agreeing or disagreeing with presenters, programme contributors and other listeners phoning in;

*"I think you're interacting without actually taking part. Especially with talkSPORT. I listen to it and because you're listening to it, you think my view is not like that and it's almost like discussing, if you like, but not actually being part of the discussion."*

Male, Watford

- **To alleviate boredom.** Similarly, despite the passive nature of radio, it is often switched on to alleviate the boredom of monotonous and mundane tasks such as work, housework, and driving on the motorway;
- **To contribute to and impact on mood.** People feel that radio programmes are often aimed at creating a mood at certain times of the day. For example, people want to be woken up in the morning by a lively show, but want a more relaxed programme before going to sleep at night. Some of the younger respondents listen to dance music shows while getting ready to go out at the weekend. The music genre is felt to impact as well as the tone and nature of the DJ's presentation and features of the programme such as phone-ins, wind-ups and competitions;

*"I rely on my radio to get me out of bed in the morning. It is just set to 7am and that's it. If I didn't have it, I would never get up."*

Female, Nottingham

*"I find radio can change or enhance your mood. I used the example of getting ready to go out on a Saturday evening or it's nice to have some nice relaxing music as you go to bed."*

Manchester, DAB Group

*"I'm a driving instructor, and if you've come home after a stressful day, and you've got a headache ... I just put Classic FM on, it's like background music."*

Male, Colwyn Bay

- Radio is an important connection with the outside world on both a **local, national and global level** to keep 'in touch' with unfolding news and events. This is important on four levels:

- to get general information on **weather, traffic, and events**;
- many of the male participants of all ages use the radio as a source of **sports** information including commentary on matches, listening to debates from sports fans and presenters discussing sports news.

*"Any match that's on is always on Radio FIVE. I won't pay for Sky Sports . . . with the telly I have to pay to watch what I can listen to for free on Radio FIVE, so I listen to Radio FIVE quite a bit."*

Male, Colwyn Bay

- The radio helps people to keep up to date with trends in new music and bands, particularly younger adults;

*"I like the wider range of music that you can choose from, and you get that from the radio."*

Male, Nottingham

*"It is a way of keeping up to date with new music."*

Female, Nottingham

- As a way of keeping abreast of ongoing national and international news and current affairs, especially as many people do not have access to a television during the day. The news on the radio is sometimes felt to be more up to date than that on the television, especially as radio is broadcast live. There were also participants in the workshops who enjoyed listening to the debates and phone-ins about current affairs issues to gain a broader perspective. The role of news was generally mentioned more frequently by members of older groups, as well as those who are out at work or travelling a lot;

*"The power that radio has got when delivering the news. I have been listening to the radio when major events happened. I was working at a factory when the Pan Am flight came down over Lockerbie and the whole factory just stopped."*

Male, Colwyn Bay

- Radio is often used as an **alternative to other forms of entertainment** such as the television or respondents' own music collection. Entertainment on the radio is often defined in several different ways and includes the humorous presentation of DJs such as Chris Moyles and Jonathan Ross; items such as competitions, crank calls and wind-ups; listening to other people's problems and opinions on debates and phone-ins; and listening to drama such as the Archers;
- Radio is seen as **portable** and always available to listen to. People often have difficulty remembering how many radios they have, as there was often one in every room. It is possible to take a radio on the beach, in the garden, to work, and to have one on a mobile phone.

## Radio – Preparing for the future

However there are some **negative** associations with radio:

- Although participants accept advertising as a necessary evil on commercial radio, they often believe there was too much advertising which cuts into their enjoyment of a programme;
- There is a belief that there is too much repetition in terms of the music played and that, if listening to the radio for long periods, it is possible to hear the same song several times;
- There is not always enough interactivity from presenters and little participation and conversation;

*“You go from one record to another record to another record, and you get bored in the end.”*

Male, Colwyn Bay

- There are debates and arguments in the household over which stations to listen to, for example men wanting to listen to Radio FIVE LIVE and mums trying to keep the children happy with Radio 1;
- The news on the radio is not always felt to be relevant and was used to fill time:

*“Scraping the barrel with news sometimes especially on local radio.”*

Female, Colwyn Bay

- Some feel that there is too much news and that news items are repeated too regularly on the radio, both locally and nationally;

*“When you hear the news, and you hear something which you’ve heard half an hour before, that’s when you turn to the control.”*

Male, Colwyn Bay

Despite these negative associations and the fact that many people listen to the radio while completing other tasks, people consider radio to be important, and relevant. Many have a detailed knowledge of both the national and local presenters, stations, and shows on those stations to which they listen and are extremely positive about the stations and choice available on the radio.



## B4 Current trends in radio listening

### Radio listening

While the quantitative survey for the Radio Review explores the views of radio listeners only, other MORI data identifies that most people in Britain (87%) listen to the radio, with men (91%) more likely to do so.

The reach of BBC stations is higher than commercial stations, with seven in ten (71%) adults claiming to listen to BBC radio stations, while six in ten (61%) listen to commercial radio stations.

**Table One: Overall radio listening among British adults**

	Total	Gender		Age		
Base: All British adults (1,003)	%	Male %	Female %	16 – 34 %	35 – 54 %	55+ %
<b>Any Radio</b>	<b>87</b>	<b>91</b>	<b>83</b>	<b>87</b>	<b>90</b>	<b>82</b>
BBC radio	71	79	64	70	70	74
Commercial radio	61	64	58	66	73	44

Source: MORI

\* Data taken from MORI Telephone Omnibus survey, 30 July – 1 August 2004

Among radio listeners only, this pattern is even more pronounced, with almost nine in ten (86%) ever listening to BBC stations, compared with seven in ten (71%) to commercial stations.

The audience for commercial radio is younger than that of BBC Radio, with 76% of listeners aged under 55. In contrast, BBC stations tend to have an older audience, with 67% aged under 55.

### Popular stations

BBC Radio 2 is the most commonly listened to of the national radio stations, tuned to by two-fifths of adult radio listeners (42%). In the qualitative phase, Radio 2 was often cited as an extremely good station with interesting and humorous presenters and a good range of popular music played. BBC Radio 1 and BBC Radio 4 are listened to by 38% and 37% respectively. Classic FM is the most commonly listened to of the national commercial stations (33%).

Among radio listeners in Northern Ireland, more (51%) tend to listen to BBC Radio Ulster than any other station. National stations for Wales and Scotland<sup>2</sup> are also popular with four in ten (40%) of Welsh listeners and a third (35%) of Scottish listeners tuning in to their respective stations. It is interesting to note that in the workshops in Belfast, many participants defined their 'local area' as Northern Ireland rather than the town where they lived, indicating that Radio Ulster may fulfil a role as both a national and local station.

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<sup>2</sup> BBC Radio Wales, BBC Radio Cymru, BBC Radio Scotland, BBC Radio Nan Gaidheal

## Radio – Preparing for the future

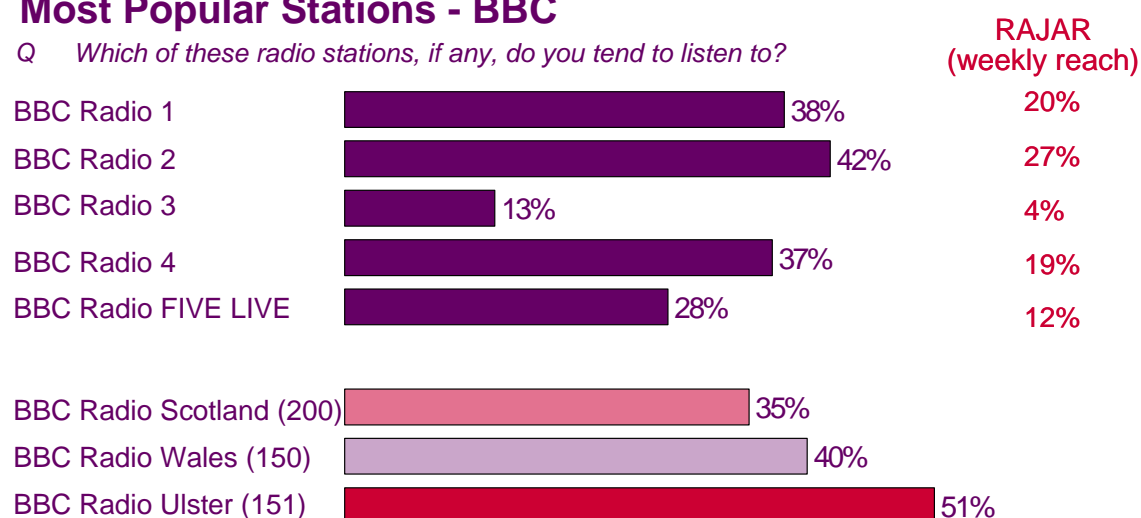
Within the English regions, reach of local BBC Stations is higher among those living in the North (31% listen to a local BBC Radio station) and the Midlands (29%), than the South (23%).

While not directly comparable, the pattern of reach identified in the quantitative survey for the Radio Review is similar to the most recently published data from RAJAR (Radio Joint Audience Research Limited), in June 2004. Figure One shows the most popular national BBC stations recorded in this survey, with the comparable weekly reach figures from RAJAR, showing the same listening patterns for the five major BBC National Radio stations.

**Figure One**

### Most Popular Stations - BBC

Q Which of these radio stations, if any, do you tend to listen to?



Base: All Radio Listeners (1,501); Scotland (200); Wales (150); Northern Ireland (151)

\* Please note that the Radio Review quantitative survey and RAJAR figures can not directly be compared, as the question wording and methodology used is different.

Those listening to less than seven hours radio per week are more likely to listen to BBC Radio 1 and, unsurprisingly listeners to this station are much more likely than listeners to the other BBC national radio stations to be aged under 35 (55% of the BBC Radio 1 audience is aged under 35). In contrast, BBC Radio 2, 3 and 4 all have higher reach among those aged 55 and over (48%, 26% and 57% respectively), reflecting the audience profile that these stations target.

The Disengaged (49%) and Entertainment Seekers (50%) are more likely to listen to BBC Radio 1, than the News Junkies and the Community Cohorts, while more than nine in ten News Junkies (91%) and the Well-informed (93%) listen to BBC National stations.

### Frequency of listening

More than two-thirds (69%) of radio listeners tune in on a daily basis, with a further quarter (24%) doing so on between three and six days per week. Older people are more likely to listen to the radio at least five days a week, with almost nine in ten (87%) of those aged over 55 doing so.

On an average day that they listen, half of radio listeners (50%) do so for up to two hours, while one in five (19%) do so for more than five hours. Welsh listeners are both more likely to listen to the radio at least five days a week and are also more likely than those from elsewhere in the UK to listen for more than two hours a week. Those from lower social classes are also more likely to listen for several hours on an average day that they listen.

In the workshops, this pattern was also identified and explained by those from lower social classes being more likely to be in an environment in which the radio is on as background, either at home, or for manual workers in particular, at their workplace. However, whatever the social grade or age of respondent, radio is essentially seen as a **passive** medium, and respondents tend to listen whilst **doing something else** such as driving a car, going to work on public transport or doing the housework.

*"It's awful driving a car without music, you really notice it."*

Male, Nottingham

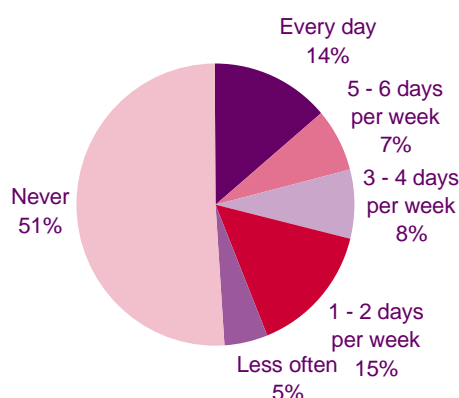
Fewer people tune into local radio as frequently as the radio overall, since much of the daily listening is to the national radio stations. Around three in ten (29%) listen to local radio every day, with a further 16% doing so on 5 or six days in the week. A quarter (24%) of respondents claim they do not listen to any local radio in an average week. Just 14% of radio listeners tune into local BBC stations daily, with 20% doing so to local commercial stations.

**Figure Two**

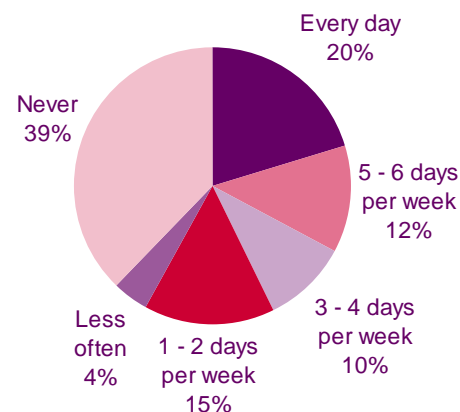
## Frequency of Listening per Week

Q During an average week, on how many days do you listen to a local BBC radio station? And a local commercial radio station?

### Local BBC Radio



### Local Commercial Radio



Base: All Radio Listeners (1,501)

Half (51%) of all radio listeners never tune into local BBC stations, with around a third (37%) not doing so to commercial stations. BBC radio is listened to more often by older listeners (23% of over 55s listen daily), while, in contrast, commercial radio is more popular with younger age groups (24% of 16 – 54 year olds listen every day). This local listening pattern reflects the overall pattern already highlighted.

Women are less likely to tune into local BBC radio (56% of women compared to 46% of men don't listen in an average week). As with overall radio listening, the audience for local commercial radio is younger than that of local BBC stations (9% of those aged under 35 listen to local BBC stations everyday, while 22% listen to local commercial stations every day). Overall, just a quarter of those aged 16 – 24 never listen to local commercial radio, while more than three in five (61%) of those aged 55 do not do so. This is reflected in the qualitative workshops where respondents believe that local BBC stations are targeted at older age groups.

While the Community Cohorts (30%) and Entertainment Seekers (31%) are more likely to listen to local commercial radio everyday, just 1% of the Well-informed listens to either local BBC or local commercial radio in an average week.

### Listening patterns

While there are specific times of the day when radio reach is particularly high, there is a substantial audience at all times of the day and night, both during the week and at weekends, reflecting the background and entertainment role that the radio performs for many people.

**Table Two: Weekday listening patterns**

Base: All radio listeners (1,501) All local BBC radio listeners (746) All local commercial radio listeners (944)	All radio stations %	Local BBC radio stations %	Local commercial radio stations %
Getting up / having breakfast	57	38	35
Travelling to work	46	27	33
At home during the day	38	20	19
At work during the day	24	13	17
Travelling home from work	43	23	30
At home early evening	37	19	21
At home late evening	26	12	13
Overnight	13	4	4
Whenever travelling in the car	56	27	33

Source: MORI

The important role played by the radio at breakfast time to wake listeners up and at drive time, as company, is substantiated by the quantitative work with over half of radio listeners doing so while getting up or having breakfast, with women (60% of women listen at this time) and those aged 55 and over (68%) most likely to do so. Radio is seen as a good mechanism to wake up with and 'get the day started' and shows are felt to be very lively at this time of the day. Furthermore, because it is possible to listen while doing other things at this busy time of the day, it tends to be the entertainment medium of choice.

*"It's a great way to start the morning!"*

Female, Stirling

*"Mine's the radio, really and then it's scream and shout at the kids to get them out ... They're not allowed the telly 'cos they just won't move when the telly's on. Don't read the paper – don't have time for that."*

Female, Watford

The Well-informed (67%) and News Junkies (65%) are more likely to tune into the radio while waking up, or at breakfast time during the week.

While two-fifths listen to the radio while travelling to or from work, highest reach is achieved during the day, either at home or work. Around two in five women (41%) listen to the radio at home during the day, while a higher proportion of men (31% of men, compared to 17% of women) listen while at work, reflecting the background use of radio as entertainment on the shop-floor identified during the qualitative phase. Similarly, as also identified in the workshops, more than half (56%) of radio listeners tune in whenever they are in the car.

*"I tend to associate radio with my car as well, 'cos that's mostly when I listen to it."*

Male, Watford

While fewer listen to either local BBC or commercial stations at any one time, the pattern of listening to local stations remains similar to that overall, with peaks, early in the morning and while travelling to and from work. Local commercial radio is more popular among those travelling to and from work and those listening while at work. This is reflected in the workshops where respondents feel that the travel information on local commercial radio was very good. In contrast, BBC local radio is more popular than local commercial radio while getting up or having breakfast during the week, although this is driven largely by the those aged 55+, almost half (45%) of radio listeners of this age listen to BBC radio at this time of a weekday.

As might be expected, the weekend pattern of listening differs from weekday patterns, with more people listening at home during the day, while the proportions listening at work falls sharply. Women (56% compared to 45% of men) remain more likely to listen to the radio at home, during weekends, as well as in the week, and older people are also more likely to listen at that time (38% of 16 – 24 year olds; 50% of 35 – 54 year olds and 57% of over 55s).

**Table Three: Weekend listening patterns**

Base: All radio listeners (1,501) All local BBC radio listeners (746) All local commercial radio listeners (944)	All radio stations	Local BBC radio stations	Local commercial radio stations
	%	%	%
Getting up / having breakfast	51	32	28
Travelling to work	14	7	10
At home during the day	50	28	29
At work during the day	10	6	6
Travelling home from work	14	6	9
At home early evening	30	17	18
At home late evening	23	9	11
Overnight	10	4	4
Whenever travelling in the car	50	25	29

Source: MORI

Local BBC radio remains more popular as listeners get up or have breakfast while there is little difference in the proportions listening to local BBC or local commercial radio during other weekend time periods.

Listeners have a limited sense of loyalty to radio stations, both on a local and national basis, and are often willing to switch between stations to find other programmes or music. This could be during a slot, throughout the day or over the course of a year. There was some discussion in the workshops about presenters moving between stations and changing slots.

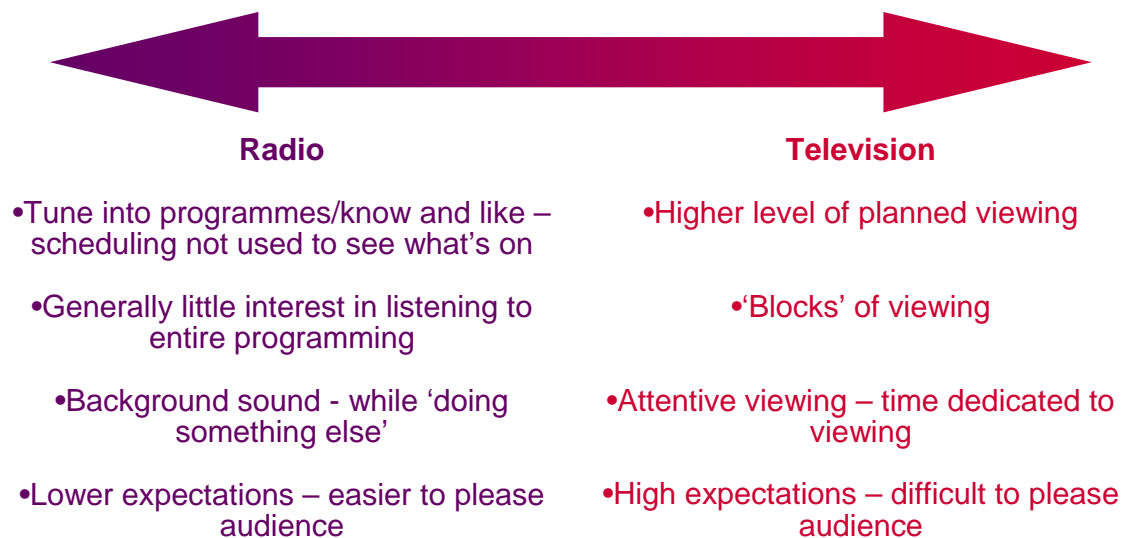
*“There’s certain stations that do apply more time to the news and to the local, and the weather and all stuff like that. So you just go to them if that’s what you want. If you think I need to know a bit more about that traffic jam on the M6 there’s certain stations you just go to them. The choice is there to go to them.”*

Manchester DAB Group

People tend not to read the radio schedules, nor to stop doing other activities in order to make time for radio programmes. People become familiar with slots, without using radio scheduling information. This, again, reflects the background role that the radio often plays and contrasts with television viewing habits.

Figure Three

## Radio versus Television – Key differences



In general, there is little interest in listening to an entire programme (unlike the TV, where people watch 'blocks' of entertainment). The three exceptions to this general rule are sports commentary, live music concerts and drama programmes. In these cases, listeners set aside time to listen, in much the same way as they would make time to watch a television programme.

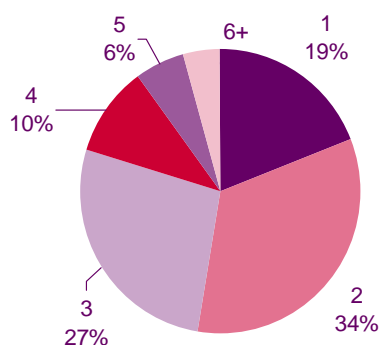
While the qualitative work identifies the extent of channel hopping among radio listeners, a minority of around one in five (19%) *chooses* to listen to just one station during an average week. A third (33%) of listeners choose to listen to two stations during an average week while around half (48%) choose three or more.

Figure Four

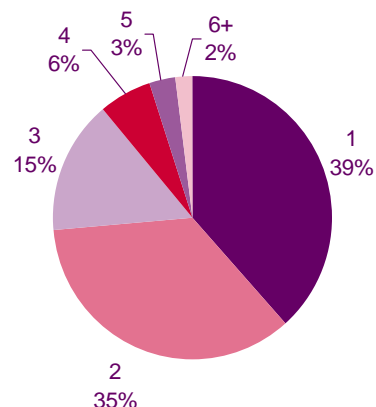
## Number of Stations per Week

Q On an average week, how many different radio stations do you choose to listen to? And local BBC or commercial stations?

All Stations



Local Stations



Base: All Radio Listeners/Local Radio listeners

## Radio – Preparing for the future

Single station devotees are more likely to be women (23% choose just one station), from social classes DE (26%) and aged 55 and over (23%). Among those who choose to listen to just one station, the BBC national stations are particularly popular, with around one in five choosing Radio 1 (21% of those who choose to listen to one station per week, tends to listen to it), Radio 2 (23%) and Radio 4 (21%). As illustrated in the DAB groups, listeners to an analogue radio are also more likely than those listening to digital radio to choose one station in an average week. This is partly because it is easier to change channels on DAB sets and other digital radio devices and also because there is more choice of channels on digital radio.

News Junkies (61%) and Entertainment Seekers (61%) are more likely to choose to listen to at least three stations during an average week, while the Well-informed are least likely to switch (33% chooses to listen to one station), reflecting that they do not listen to local radio but restrict themselves to the BBC national radio stations.

There is less switching between local radio stations than across radio stations overall, reflecting, in part at least, that when restricting choice to local stations there is a more limited number of stations available to listeners. Rural dwellers are more likely than those living in urban centres to choose just one local radio station, although they are no more likely to choose to listen to fewer stations overall.

### Importance of radio services

As identified during the qualitative phase, the importance of the radio as an entertainment platform is clear, with more than eight in ten listeners stating that the music / records played are of importance to them in choosing a radio station. This service is particularly important to young adults (94% of those aged 16 – 34) and commercial radio listeners (88% say it is important), rather than BBC radio listeners (84%).

Keeping abreast of news is also a service which is important to listeners, at both a national and local level. More than nine in ten (94%) of heavy local BBC radio listeners state that local news is important to them in deciding to tune into a station, compared with 87% of heavy local commercial listeners.

Local radio services are clearly important to listeners, with local traffic and travel information, local weather forecast and issues affecting the local community joining local news among the seven services mentioned by more listeners as important in deciding whether or not to tune into a station, see Table Four.

Local news (85%), local weather (81%) and issues affecting the local community (75%) are all important to the Community Cohort, while just one in five (22%) of the Disengaged say that local community issues are important to them in deciding to tune to a particular station.

World / national news and current affairs are of particular importance to the News Junkies and Well-informed, while Entertainment Seekers are more likely than other listeners to say that competitions, celebrity interviews, phone-ins and the music played are important in their decision to tune to a particular radio station.



**Table Four: Importance of radio services in deciding to tune to a station**

Base: All radio listeners (1,501)	Very important	Important	Neither	Not important	Not at all important	Net score +/-
	%	%	%	%	%	%
<i>Music / records played</i>	47	38	4	8	3	+74
<i>World / national news</i>	30	49	5	13	3	+63
<i>Local news</i>	22	48	5	19	6	+46
<i>Local traffic and travel news</i>	24	44	6	18	8	+43
<i>World / national current affairs</i>	23	45	7	18	7	+43
<i>Local weather</i>	18	48	5	22	7	+36
<i>Issues affecting the local community</i>	15	42	8	25	9	+22
<i>National weather</i>	9	39	8	35	9	+5
<i>Comedy</i>	11	37	9	32	10	+5
<i>National sport</i>	14	29	7	30	20	-6
<i>Information on local events</i>	7	35	10	35	13	-6
<i>National traffic and travel news</i>	10	32	8	36	13	-7
<i>Documentaries</i>	9	31	9	35	16	-11
<i>Live music guide</i>	7	29	8	40	15	-18
<i>Local sport</i>	8	21	5	39	27	-35
<i>Drama</i>	7	20	8	45	20	-38
<i>Celebrity interviews</i>	2	22	13	40	23	-39
<i>Business information</i>	4	21	9	42	24	-40
<i>Phone-ins</i>	4	16	9	43	28	-52
<i>Competitions</i>	2	11	8	49	30	-66

However, the qualitative workshops provide clear evidence that while these services are not considered important, listeners expect most, if not all, of them to be provided by every radio station. As such, therefore, in terms of service provision, content alone will not guarantee an audience. While the services broadcast are important, it is the style in which it is broadcast, in terms of the personnel presenting shows and the mix of music and chat for example that draws an audience.

## **Developments in radio technology**

Radio is leading the move towards convergence. Services are now available and listened to via digital television, the internet and mobile telephones, as well as DAB sets. These developments in technology have resulted in a range of benefits for the listener including increased choice, increased portability and opportunities to interact and download programmes / tracks.

RAJAR figures (June 2004) show 28.8% of all UK adults have at some time listened to radio via their digital television set, 15.0% claimed to have listened via the internet and 15.4% of 15-24 year olds have tuned in through their mobile telephones.

This increased convergence, availability and portability may have had some impact on overall listening patterns which suggest that the average number of hours spent listening to the radio each week has increased by 5.2% from 23.2 hours / listener in June 1999, to 24.4 hours / listener in June 2004.

## B5 Localness and local radio

### What is localness?

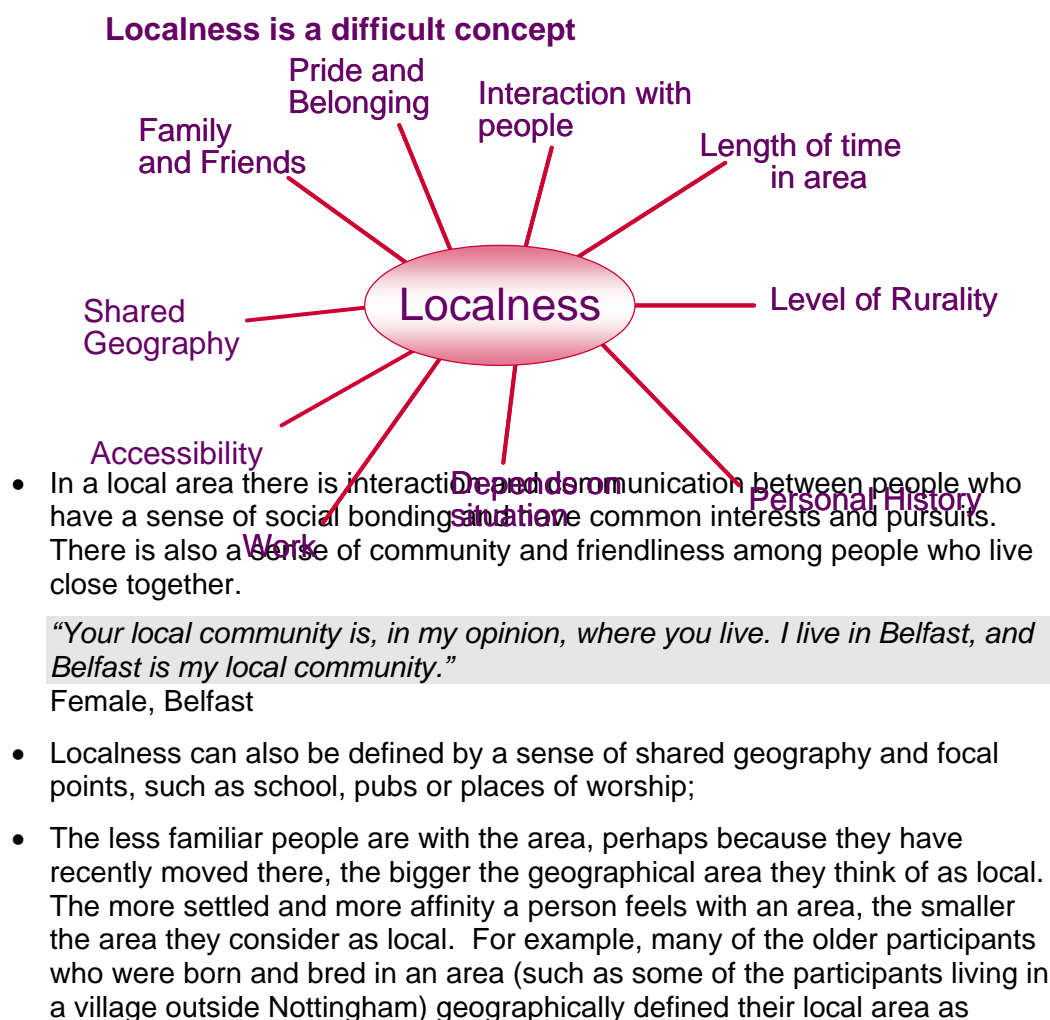
In the qualitative workshops people tended to find localness a difficult concept to articulate and think about. Although sometime defined in purely geographic terms, localness means different things to people depending on their situation. Indeed, the concept of localness is very transient and changed in people's minds throughout the radio workshops depending on what was being discussed. For example, when people talk about their job, their definition of localness changes to include the area where they work. It is therefore very much a personal decision as to what constitutes localness.

"It depends what's personal to you . . . How close to home is it, is it going to affect me? . . . but I live at St Helens and we've got family elsewhere."  
Manchester DAB Group

*"It just depends on who you're talking to."*  
Male, Belfast

Despite this, people are able to identify some important factors that constitute localness.

Figure Five



smaller than younger residents from the same village, who included the City as they went out in the evenings into Nottingham;

- Personal history also plays a role in how people define local:

*"I think for me I've lived in the centre of Manchester when I was at college. I went to college in Liverpool as well so given they're both, what, Manchester's only ten minutes away, Liverpool's only half an hour away, that to me is local . . . I go up to Liverpool for lunch."*

Manchester DAB Group

- The more accessible the surrounding areas, the wider the local area is defined. If there are good transport links to a surrounding area, such as between Oldham and Manchester, then people's concept of localness widens – particularly for the younger participants in the radio workshops. Similarly, in Belfast, it is felt to be very easy to travel around the whole of Northern Ireland from the city and so the whole province is defined as local. Even if an area is accessible people have to be willing to travel as it was noticeable that some people defined their local area as smaller if they did not like travelling by car or public transport;
- The context of local is also crucial and depended on the topic being discussed. For example:

*"When you say to people local, you've got to look at them in what aspect are we talking about. We're talking about radio, aren't we? Now if someone says to me, do you go down to your local pub? I'll say yeah, the one over in Alexandra Park... my local pub is round the corner. But when you're talking about radio, which is information ... that locality becomes wider."*

London DAB Group

- Location of family and friends also drives feelings of localness. For example, there are respondents in the radio workshops with relatives that live in neighbouring towns and their concept of localness widens to include these towns;
- Those who commute to work are also likely to define localness more widely. If people work in neighbouring towns and cities, then their concept of localness is often widened;
- The more rural the area, the smaller the area that is considered local. This is related to a lack of accessibility to surrounding areas and also a belief that the local community and interaction between people is stronger in more rural areas;
- People often talked about how they belong to their 'local area' with a sense of pride and happiness mentioning landmarks, local industries and positive aspects about living where they do. For example, in Belfast there is a sense of pride that the city and Northern Ireland in general was 'on the up' with less paramilitary activities and new shops and bars opening.
- Sense of humour is felt to be important as people generally identify a specific humour to their area. Areas are believed to have their own defined sense of humour, which people from other local areas may not understand or identify with.

*"The sense of humour here is quite different, and doesn't travel well – but we like it."*

Female, Belfast

There is also a recognition that understanding of localness might vary by area of the country. People acknowledge that living in a larger city might mean that the concept of localness varies to someone living a small and close-knit village community.'

*"Like I was going to get a place in the Medway and it'd be a lot cheaper, then I got in this taxi with this guy whose mum lived down there or something and found that their whole perspective, well they're a very local and tight-knit community where London isn't."*

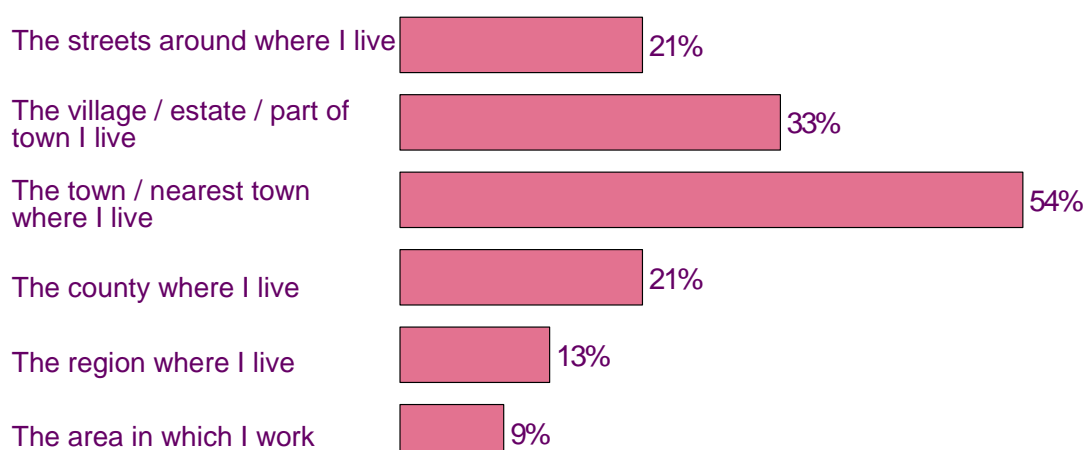
London DAB Group

During the quantitative phase, respondents were asked to geographically define their local area. On this geographical basis, the 'town, or nearest town to which I live' is the most frequently cited definition of their local area, with half (54%) defining their local area in this way, see Figure Six.

Figure Six

## What is 'my local area'?

Q Which of these do you consider to be your local area?



Base: All radio listeners (1,501)

Reinforcing the findings of the qualitative exploration that the more rural the area the more tightly defined the local area was felt to be, rural dwellers are more likely to define their local area as the 'village / estate / part of town' (48% of rural dwellers, compared to 26% of urban dwellers), than urban dwellers who generally regarded their local area as wider, incorporating the 'town / nearest town' (59% of urban dwellers, compared to 44% of rural dwellers).

The Rural Community cluster group are particularly likely to define their local area tightly, with almost all (97%) regarding it as the 'village / estate / part of town' in which they live. All other groups, including the Community Cohorts, are more likely to define the area as the 'town / nearest town to which I live'.

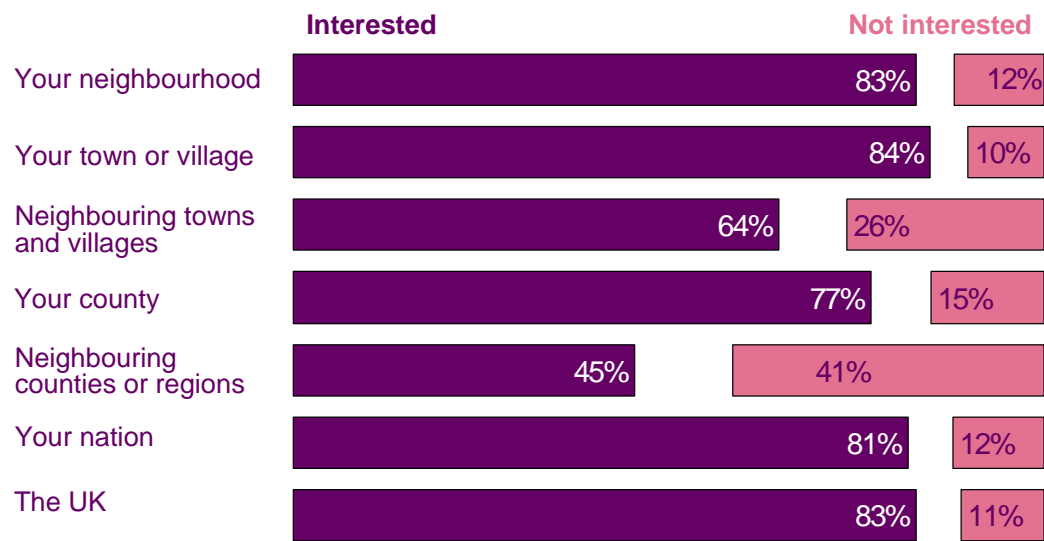
Interest in the local area

Radio listeners are more interested in what’s going on around the local area, their county or nationally, than they are in neighbouring towns or in more regional information, see Figure Seven. Those not interested in local issues are more likely to be men, aged 16 – 24 and are less likely to listen to local BBC or commercial stations than national BBC radio.

Figure Seven

Where are we interested in?

Q     How interested are you in hearing about issues and what’s going on in....’?



Base: All radio listeners (1,501)

## Which media do people think of as local?

Figure Eight

Local Radio	Local TV
<ul style="list-style-type: none"> <li>Many listen to local commercial radio <ul style="list-style-type: none"> <li>Largely driven by music and local information</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Not seen as 'local'</li> <li>Is regional with sporadic local information</li> <li>Only really regional news bulletins</li> <li>Not in touch with communities</li> </ul>
Local Press	Local Internet
<ul style="list-style-type: none"> <li>Seen as <u>very</u> local</li> <li>Used as source of information as can find what's needed at time needed</li> <li>Most have good local press service</li> </ul>	<ul style="list-style-type: none"> <li>Internet not really recognised as being localised</li> </ul>

In the workshops, the local press was felt to be the most 'local' media and is most widely used as a source of information for events such as cinema listings and local sports events by workshop participants. People tend to keep these papers to hand to use when needed and are confident in them being a good source of information.

*"For me, I think if I can see local events in the local paper, I'll cut it out and make a note of it, but if it's on the radio, you might miss it."*

Male, Stirling

Despite this, views of the local press were mixed, with some areas such as Belfast viewing it as parochial, dull and uninformative, but others seeing it as 'in touch', and containing useful local information. Some people feel the local press was sometimes too insular. Some find stories trivial and irrelevant and the local newspaper is sometimes regarded as a source of amusement rather than information. Some mention inaccuracies in reporting in local press stories.

*"The main story in our local paper was the fact that the local paper had been going for 100 years! They had the cheek to put that as their headline. It was all about them."*

Male, Nottingham

Regional television is seen as having much wider coverage and is therefore seen as less localised. People in the Oldham workshop, for example, felt that regional television covers events in Liverpool and Lancashire which has little relevance to them. Those in Colwyn Bay expressed similar sentiments believing that their regional station covers events and news in South Wales which has very little relevance to them. There is also a perception that regional television only reports local news in sensationalist way and can exclude some areas, particularly small towns and villages.

*"They totally blank us out, don't they?"*

Male, Colwyn Bay

### Media Consumption

A wide range of other media are consumed by radio listeners, with almost all (96%) watching television, three-quarters (76%) reading a national newspaper and two-thirds (67%) reading a local or regional newspaper.

**Table Five: Media consumption, average week**

	Total %	Gender		Age			
		Male %	Female %	16 – 24 %	25 – 34 %	35 – 54 %	55+ %
<b>Any TV viewing</b>	<b>96</b>	<b>95</b>	<b>96</b>	<b>96</b>	<b>96</b>	<b>97</b>	<b>94</b>
Terrestrial TV channels	88	87	89	89	90	88	87
Multi-channel TV	58	60	56	64	64	62	46
<b>Any radio*</b>	<b>86</b>	<b>85</b>	<b>86</b>	<b>85</b>	<b>87</b>	<b>87</b>	<b>84</b>
National radio	72	74	70	67	71	70	76
Local radio	59	59	59	62	67	64	46
<b>Any National newspaper</b>	<b>76</b>	<b>77</b>	<b>75</b>	<b>81</b>	<b>67</b>	<b>72</b>	<b>83</b>
National broadsheet	43	44	42	38	38	41	50
National mid-market	37	35	39	34	32	38	39
National tabloid	32	33	31	50	36	30	22
<b>Regional / Local newspaper</b>	<b>67</b>	<b>64</b>	<b>70</b>	<b>64</b>	<b>65</b>	<b>70</b>	<b>67</b>
<b>Magazines</b>	<b>52</b>	<b>47</b>	<b>57</b>	<b>65</b>	<b>59</b>	<b>49</b>	<b>45</b>
<b>Internet</b>	<b>55</b>	<b>55</b>	<b>55</b>	<b>74</b>	<b>71</b>	<b>60</b>	<b>31</b>
<b>Teletext</b>	<b>48</b>	<b>49</b>	<b>47</b>	<b>53</b>	<b>52</b>	<b>49</b>	<b>41</b>

Source: MORI

\* Although all respondents in the survey listen to the radio, this question explored media consumption in an average week, against those ever listening to the radio.

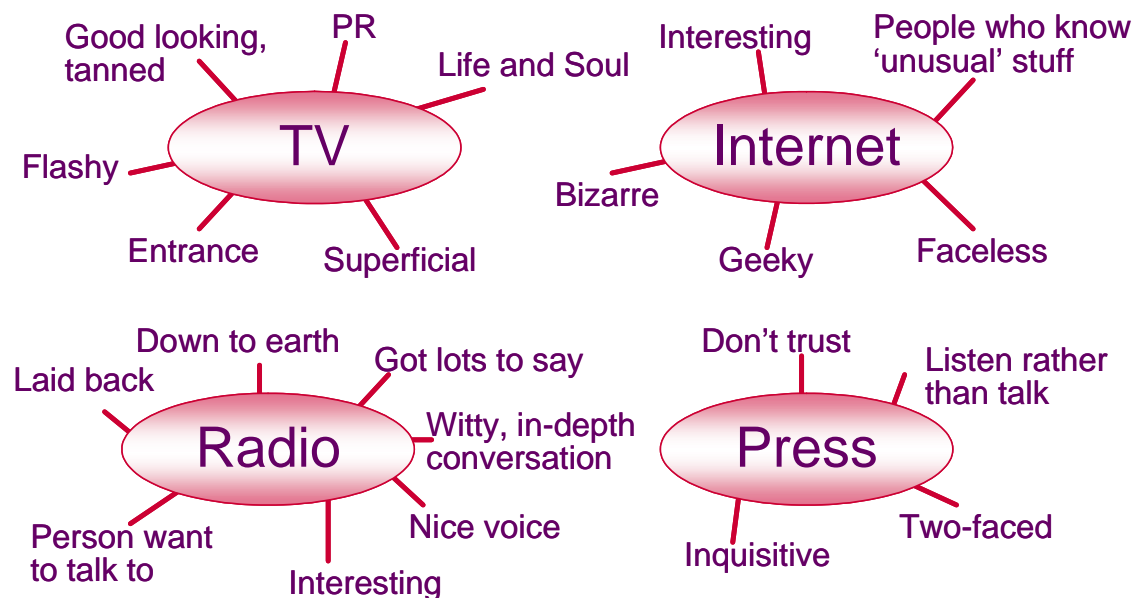
Consumption of some of these media differs among listeners to the different types of radio station. Listeners to BBC radio are more likely than those who listen to commercial radio to read broadsheet newspapers (45% compared to 40%), while commercial radio listeners are more likely to read tabloid newspapers (35% compared to 30%) and to watch multi-channel TV (62% to 54%) in an average week.

However, those who listen to local radio (either BBC or commercial) are no more likely to read local or regional newspapers than those who do not tune to local stations.



In the qualitative workshops, the image of the different media was explored. Participants were asked to imagine the different media were guests at a party and were then asked to articulate how these *guests* might appear and act. This exercise showed radio in a very positive light in comparison with the other media especially television and the press.

Figure Nine



*"I think your radio presenter is just your average person – not like your TV presenter, who's all posh ... and above themselves."*

Female, Stirling

It is clear that each media has a different role to play in the provision of information about different localities (see Table Six). The local press, both paid-for and free, is the most frequently used source on information on more localised issues (i.e: within nearby towns), while local radio is the fourth most regularly used way of finding out information, behind word-of-mouth. As the geographic area of coverage widens, there is less reliance on local press, although paid-for newspapers remain a key source for many seeking information at a county level. Regional television, is the most regularly used at county and regional level, while few rely on it for more local information.

Beyond the county level, television becomes an increasingly important source of information, with regional television increasing for information on neighbouring counties or regions, while national TV is the most used source for information at a national or UK level.

Across all of the different localities, local or national radio does not feature as one of the top two sources of information. Local radio increases as a source of information for information at a county level, but even among local radio listeners, it remains the third most used source. Despite being the heaviest listeners to local radio, the Community Cohorts are no more likely to listen to local radio for information on their neighbourhood or town / village.

**Table Six: Sources of information for different localities**

	Neighbour -hood	Town/ village	Neighbouring towns/villages	County/ region	Neighbouring counties/ regions	Your nation	The UK
Base: All radio listeners (1,501)	%	%	%	%	%	%	%
National TV	1	1	2	2	9	46	56
Regional TV	5	5	11	25	25	6	1
National radio	*	*	1	2	5	14	13
Local radio	9	8	12	15	10	2	1
National newspaper	1	1	3	5	11	22	22
Paid-for local newspaper	32	35	30	21	10	2	1
Free local newspaper	28	29	18	9	4	*	*
Word of mouth	14	12	6	2	3	1	1
Ceefax / Teletext	1	1	1	1	1	*	1
Internet	1	1	1	2	3	3	3

Source: MORI

While local radio, per se, is not one of the three key sources of information on either neighbourhood, or town / village issues, it is the most frequently used source for those very interested in local traffic & travel updates, with two-thirds tuning to the radio for this. Local radio is used by more than one in five local radio listeners as their main source for local weather (28%), local sport (25%), local celebrities (23%) and local news (21%). However, local paid-for newspaper and / or regional television coverage are used by more for all other information other than traffic and travel updates.

Figure Ten

## Sources of Information

*Q. And what is your one main source of information for...? – Top 3*

<b>Local news</b>	Paid for local paper (30%)	Regional TV (23%)	<b>Local Radio (21%)</b>
<b>Local traffic &amp; travel</b>	<b>Local Radio (67%)</b>	Regional TV (10%)	National TV (9%)
<b>Local weather</b>	Regional TV (40%)	<b>Local Radio (28%)</b>	National TV (12%)
<b>Local sport</b>	Paid for local paper (33%)	<b>Local Radio (25%)</b>	Regional Newspaper (9%)
<b>Live music</b>	Paid for local paper (22%)	<b>Local Radio (13%)</b>	National Radio (10%)
<b>Local music/bands</b>	Free local paper (25%)	Paid for local paper (20%)	<b>Local Radio (11%)</b>
<b>Local film listings</b>	Paid for local paper (32%)	Internet (23%)	Free local paper (20%)
<b>Local events</b>	Paid for local paper (39%)	Free local paper (24%)	<b>Local radio (14%)</b>
<b>Property</b>	Paid for local paper (46%)	Free local paper (28%)	Internet (9%)
<b>Community issues</b>	Paid for local paper (35%)	Free local paper (20%)	<b>Local radio (12%)</b>

Base: All who are 'very interested' in each attribute

The internet is not perceived as local media, given its global reach and the ability to listen to radio stations anywhere in the world. Despite this, it is occasionally used to look up local information:

"I use another source of the media to find basically all that out and it's a website called Manchester Online, it's the Manchester Evening News website."

Manchester DAB Group

Word-of-mouth was also mentioned in the workshops as an important way of getting information about what was happening in the local area. There were also very occasional mentions of using Teletext for cinema listings and keeping an eye out for fly posters detailing local events.

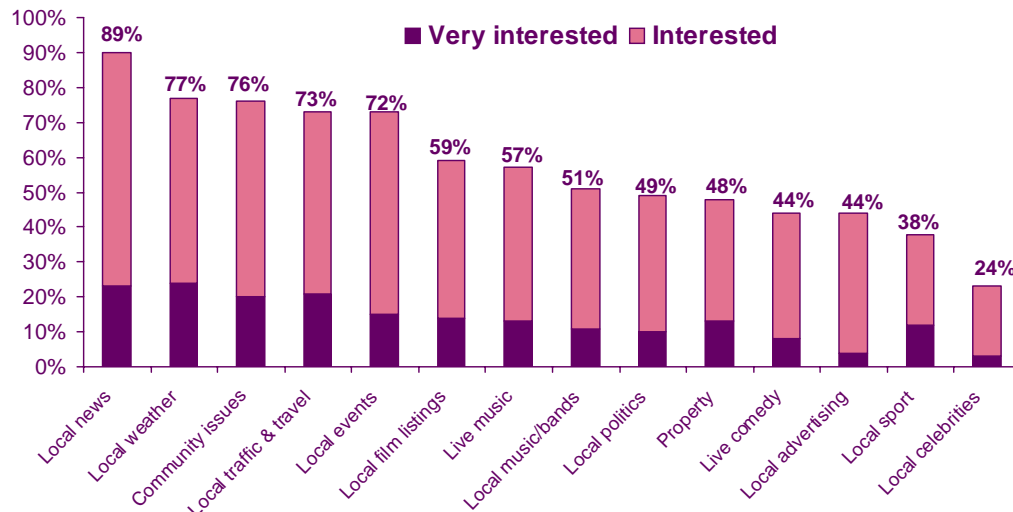
### What do people need / want to know about their local area?

With such considerable interest in hearing about what's going on in the local area, it is of little surprise that people want to know about specific issues in their local area.

Figure Eleven

## Interest in listening to, watching and reading about things in local area

Q How interested or not are you in listening to, watching, reading about or knowing about each of the following in your town or local area?



Base: All radio listeners(1,501)

On the whole, women have more interest in these local issues than men, including local news (92% of women interested compared to 87% of men), local weather (81% compared to 73%), community issues (80% compared to 72%), traffic and travel (77% compared to 70%) and local events (79% compared to 67%). While local sport is, overall, one of issues that fewest are interested in, it appeals, unlike almost all others, far more strongly to men (52% interested) than women (23%).

The Community Cohort are particularly interested in finding out about news (98%), weather (90%), traffic & travel (86%) and property (64%) in the local area while Entertainment Seekers are interested in live music (93%), local events (88%), local bands (87%) and film listings (81%). In contrast, the Disengaged group have little interest in most local issues, just one in three (28%) are interested in local news and local events (33%), with fewer still interested in the weather (16%) and none of this group interested in traffic information. Both Entertainment Seekers and the Rural Community are interested in local news and weather information, while News Junkies and the Well-informed have less interest in these, reflecting their greater interest in national news and current affairs.

The relative importance of hearing what events are happening locally varies according to the area in which the workshops were held. However, life stage and accessibility are the two factors driving what people wanted to know about their local area. If respondents feel there are good public transport links or road access, then they are interested in learning about events to which they could travel to easily, even if it is geographically some distance. For example, those in the London DAB group (held in Blackheath) felt that they could go to an event anywhere in the London area because it was easily accessible.

People want to hear local traffic reports on the local area – perhaps predictably. Again, unsurprisingly, this is felt to be most important at morning and evening rush hour. For some, local traffic reports are more important than hearing about local news, and weather information.

*“If you’ve got RDS, then it will automatically tune in if there is a local traffic report . . . and the advantages of that, I think it’s fantastic.”*

Male, Colwyn Bay

*“What the nice thing is about Capital Radio was that it set off from Neasden. OK, so that’s Hertfordshire, the flying eye I’m talking about. It would set off from Neasden so you’d get all the local traffic jams, then it would pass through, say, ... Elstree and then it would go obviously to London and you would hear the traffic news in Slough and Beaconsfield and Buckinghamshire, so it did actually stretch a little bit further, but the nice thing for me it felt because it was leaving Watford you actually got local traffic.”*

Female, Watford

Despite negative associations with advertising on commercial local radio, older respondents and those with families like to hear about whether a new store or supermarket was opening and thought that adverts from local suppliers could provide useful information. However there is a perception that only large companies can afford to buy the spaces on local radio and therefore local business are unable to compete for radio advertising space.

*“If you’re looking for a certain produce – say double glazing – and you hear it on the radio, you can give them a phone.”*

Female, Stirling

Overall, people want to listen to local news, although there was a split about whether they want the local or national news to take priority during the bulletin. Despite this, there are people, especially in Northern Ireland, who do not like hearing the local news as it tended to be quite negative in tone and comprised mainly of local politicians arguing with each other. It was also questioned whether local areas can generate enough interesting news, especially as news tends to be repeated in some participants’ views, far too regularly.

*“I’d have headlines about what is going on in the world, but not in depth.”*

Male, Nottingham

*“I don’t like the local news. You’re not going to hear any good news hearing about Northern Ireland ... it’s never good.”*

Male, Belfast

Many participants across the workshops listen to their local stations not only because of the local information, news and traffic updates, but also because they like the presenters, music played and the features on the shows. For example, some participants like the local radio phone-ins or the ability to request a record to be played. However, there is a strong perception, particularly amongst younger respondents, that many local radio stations essentially play the same sort of music constantly, and there is little variety. These participants are, perhaps understandably, less likely to be well-disposed to the idea of local radio – seeing little point in a ‘local’ station indistinguishable from numerous others around the country.

## Radio – Preparing for the future

*"I like competitions [on my local radio station], yeah, and I like it when people ring in and stuff. It's quite interesting, it's funny. There's some completely wrong answer and you know it's not that in a million years."*

Female, Watford

*"With radio, you find that a lot of the local stations play the same records over and over and over again."*

Male, Colwyn Bay

*"They're all exactly the same. You've got Ram FM (local commercial station) in Derby, and they are exactly the same ... They play exactly the same music, if you go from Ram FM to Trent FM, it is exactly the same."*

Male, Nottingham

People often like hearing about areas with which they were familiar. As such, having representatives from the local station visible around the local area – at community events, or in bars and clubs – is seen as a good way of providing an 'emotional connection' between the listener and the station.

*"Transforms it from something you listen to, to an actual physical thing which you see around you. You see them driving round Nottingham all the time, driving past, and they actually go to events, so it kinds of links it all together."*

Male, Nottingham

The view on provision of local sport coverage was polarised, both by gender and location. In general men (of all ages) tend to be more in favour of having coverage of sport on local radio. However, the degree to which local sports or sports teams should be covered varied, depending upon the profile of local sporting teams. In Nottingham, for example, people associated a number of sporting activities and teams with the town (including the Trent Bridge cricket ground, Nottingham Forest and Notts County football teams, the Nottingham Panthers ice hockey side, as well as the Nottingham Tennis Tournament). As such, there is a fairly high degree of support for local radio devoting coverage to local sporting events and teams. The same was true in Oldham (though here, local teams included football teams based in Manchester, as well as Oldham Athletic). Respondents in Belfast, by contrast, tended to have less of an interest in local sports teams and fixtures – though there was a degree of support about hearing news about national sports teams.

### How 'local' does radio need to be?

When asked how local they wanted their local radio station to be and specifically the area it should cover, responses were largely dependent on individual definitions of their local area. However, many thought there is not enough news and events going on to cover a small area throughout the whole day.

*"But for radio, you want to hear what's going round the city . . . You don't want to hear Lewisham Radio repeating these miniscule little stories non-stop."*

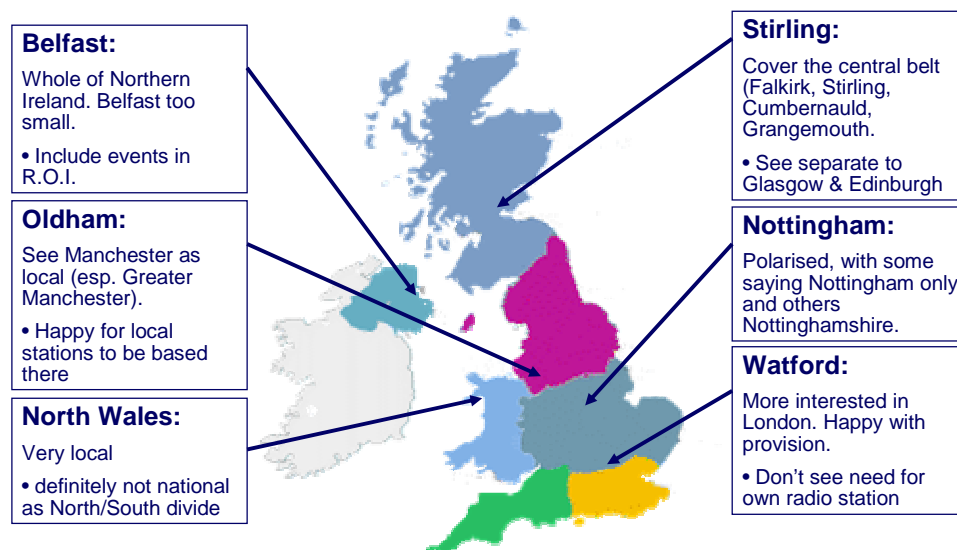
London DAB Group

*"I don't think there is as much going on in Belfast as elsewhere – not enough to justify a local radio station."*

Male, Belfast

Figure Twelve summarises the responses by region:

Figure Twelve



Those in **Colwyn Bay, North Wales** generally feel that the local radio station should cover a relatively small area. A previous radio station had been based in the town but recently the studio moved to Bangor. Older respondents believe that this presence in the town has made them feel more involved in the station. They are also less favourable about current local provision since the closure of their local station and some had stopped listening altogether. These participants feel that the radio stations that remain are all very similar and didn't suit their needs as the previous one had done.

*"You could walk in and report local event and news [when local radio was based in town centre]."*

Colwyn Bay, Older

Nevertheless, they also perceive that having reporters based locally is more important than having the station based locally and are not sure whether there is enough going on locally to justify a local station. Younger people are likely to listen to radio based in Liverpool for example, as they felt that this area is local to them – it is an area that was relevant and within reach.

Many of those in **Oldham** incorporate Manchester into their local area. Manchester is extremely close with very good transport links and people regularly go there for work and / or leisure purposes with little variation across age and life stage. In Oldham participants feel very strongly that any local station should incorporate the 'northern spirit' and be straight-talking, displaying the Mancunian sense of humour. The views in **Watford** are similar, with people often travelling to London for work, shopping and entertainment.

Younger participants in **Belfast** feel that their local radio station would cover the whole of Northern Ireland. This is due to the fact that they want to know about what was going on in terms of new music and events in the whole of Northern Ireland and, on occasion, the Republic of Ireland too. They also feel excluded from current local radio because of the types of music played, and because older groups were perceived to have a greater interest in the local area. Older people in Belfast also feel

a local station should also cover the whole of the province and therefore should be based within Northern Ireland, but should also cover some issues across the whole of the Republic of Ireland and Scotland as well.

*“I’m local to Northern Ireland.”*

Male, Belfast

*“People tend to think that the whole of Northern Ireland, the whole six counties, that’s what I think of as localness.”*

Male, Belfast

In **Stirling**, there are very mixed views on what local area should be covered, depending on people’s definitions of localness and their age. Older participants tend to think local radio should be centred on their local town, whereas middle aged people think it should be widened to include towns in their part of the central belt such as Falkirk, Cumbernauld and Grangemouth, but not the major cities of Edinburgh and Glasgow. However, younger people who tend to travel into Glasgow quite regularly for shopping, work and entertainment purposes think the area should be widened to include Glasgow as well.

*“What’s the point of hearing what’s on in Kilmarnock if you’re in Cumbernauld?”*

Female, Stirling

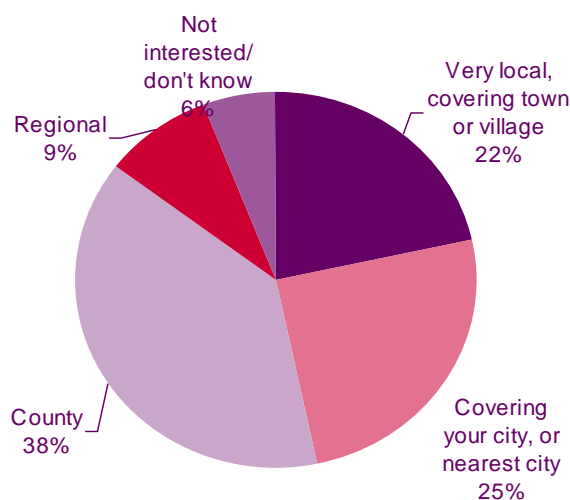
In **Nottingham**, similar mixed views are expressed, again dependent on age. Some older participants feel that local radio should only cover Nottingham and Mansfield, whereas younger people who often travel further a field when going out, wanted to hear about events across the whole of Nottinghamshire.

Two-fifths (39%) of those who currently listen to local radio believe that ideally a local radio station should have county coverage, as is the case with many BBC local radio stations presently (see Figure Thirteen). However, almost half, would like their local station to be restricted to a smaller area than this, with one in five (22%) wanting very local coverage and a quarter (25%) the area around their city or nearest city.

Figure Thirteen

## Local Radio Coverage

Q Which of the following best describes the area you would like your local radio to cover?



Base: All who listen to local radio (1,146)



Heavy listeners to local BBC stations are more likely to want a broader area covered by their local station (19% compared to 9%), perhaps, as the qualitative work indicates, because there is not enough news and information to support a smaller geographical area while keeping content fresh and interesting.

*"There would be a lack of things going on. Although it is quite a big area, it is not big enough to sustain a station."*

Male, Nottingham

Those living outside England are particularly likely to want a broader region covered by their local station, with more than a quarter (28%) in Northern Ireland, and one in six (16% Scotland, 14% Wales) preferring this. Particularly, in the qualitative workshops in Northern Ireland, but also in Wales and Scotland, a broader 'local' area was defined than in England, which may help to explain this greater interest in radio stations with regional coverage.

Interestingly, while rural dwellers are more likely to define their local area to a tighter geographical area, over half (54%) want their local radio station to cover a county or regional area, while fewer urban dwellers (45%) want local radio to cover such a broad area. Once again, the qualitative work indicates that rural dwellers do not believe there is enough happening in the locality to justify a very local station. However, around one in five (22%) would prefer their local radio station to cover a very local area, with English residents (23%) more likely than those in the nations to want this (16% Scotland and Wales, 13% Northern Ireland).

## Reactions to community radio

Respondents in the workshops did not have a strong image of community radio – this is probably associated with lack of experience as community radio stations are currently only operating in 14 areas. Respondents tended to be negative in tone, describing community radio as:

- Unprofessional;
- Un-dynamic;
- Boring; and
- Would be dominated by a small group of people with a specific message.

Whilst, as discussed earlier, there is a certain degree of support amongst respondents for local coverage of local events, producing radio is still seen as something which should be done by professionals. There is also a feeling that there is simply not enough interesting subject matter to keep community radio broadcasting every day.

Those who do see the advantage of the idea of community radio feel that it might be something which might appeal to younger listeners - partly because of its association in certain areas (particularly in Watford and London) with pirate stations, which tend to be run by young people. It also might appeal to elderly or housebound listeners who can't get out, or could be broadcast during only during a local event such as a community festival.

*"Keep the kids off the street."*

Nottingham, Male

This antipathy to community radio should be balanced with the positive reaction that many respondents have to the idea of local radio stations becoming more engaged with local issues and local events. Indeed, it was suggested that perhaps local radio stations could run community slots or try to involve local residents more in the programming for example through interviews and phone-ins, or a local community watch, such as warning if burglaries were occurring in the area.

In contrast the research conducted by Ofcom earlier in 2004<sup>3</sup> to assess the overall impact of community radio on listeners, station participants and community leaders showed a hugely positive opinion amongst those target markets which have experienced what community radio has to offer for over 2 years. Significant numbers in the four areas researched are aware of, and listen to their community radio station – and a high level of satisfaction is recorded amongst listeners. Both listeners and stations participants saying it enhances their personal well-being and sense of community. Listeners typically perceive community radio as well run, relevant and entertaining – and clearly different to the existing radio product offered. One example demonstrating the impact of community radio is Awaz FM which provides radio services for the Asian population in Glasgow. 91% of the target market in Glasgow is aware of the station – with 59% saying it is the station ‘most listened to’.

### **Key times for local coverage**

People consider mornings and evenings the key times for local news and traffic information. The quantitative research substantiates this, highlighting that local programming is particularly important to local radio listeners at weekday and weekend breakfast time and during weekday drive-time (See Table Seven).

Fewer demand local programming at weekends, although a third (36%) still want this at breakfast, three in ten (30%) during the day. Reflecting that fewer people travel to work at the weekend, there is a substantial fall in demand for local programming at drive time and one in five (20%) feel it is unimportant to have local programming at any time during the weekend, more than twice as many that feel local programming isn’t necessary during weekdays.

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<sup>3</sup> *Licensing Community Radio, A Statement of Ofcom’s Strategy for the introduction of community radio in the UK, and the process by which licences will be advertised, awarded and regulated*, Ofcom, August 2004

**Table Seven: Important times to hear local programming**

	Weekdays	Weekends
	%	%
Base: All local radio listeners (1,146)		
Breakfast time	46	36
Daytime	21	30
Drive time or early evening	39	21
Evening after 7pm	11	10
None of these	8	20

Source: MORI

More than three in five (62%) would be happy with a local radio station that *'plays a mix of programmes about local issues with programmes that are produced outside the local area'*, although one in five (20%) would be unhappy with this. Entertainment Seekers (76%), the Rural Community (72%) and News Junkies (72%) are happiest to accept a mix of programming.

Among those happy to accept a mix of programming, around a third (31%) are happy with a 50:50 split between local programmes and those produced elsewhere, with four in ten (38%) wanting a bias in favour of local programming, while three in ten (29%) favour weighting content in favour of programmes from elsewhere.

### Location of news compilation

Some participants in the radio workshops believed that it does not matter where the news is **compiled**, as long as it is **relevant** and read by a person with **local knowledge**. The newsreader should not be patronising and needs to know the local area and care about local people. However, others believe that this would be difficult to do, if people are not based in the local area. There is also a belief that presenters should be based in the local area so as to have an emotional connection with listeners.

*"If the news is just compiled in London, you're going to miss out on so much. You're not going to get a feel for the place, for the twists in the story and whatever."*

Male, Belfast

*"A local station should be based in the local area ... they're not going to know absolutely everything that's going on in that area."*

Female, Stirling

*"There's no point in a station being based in Cumbernauld telling the people of Stirling what is happening and vice versa."*

Male, Stirling

Of particular importance is that names and places are **pronounced correctly**. In some areas such as North Wales, having the right accent and 'patter', using appropriate language and sayings is felt to be especially important. For others, accent is less important as long as the presenter knew the area and could pronounce place names correctly.

## Radio – Preparing for the future

*“There was one where, exactly what you’re saying, they’ll be talking about local places but there was one, I can’t remember which DJ it was but he was working on a local radio station and he obviously didn’t live here and he obviously didn’t know the area because he was talking about Salford (“Sallford”) and Worsley (“War-sley”). I just thought somebody should go down and have a word with him. That’s not how it’s pronounced.”*

Manchester DAB Group

*“We listen to other radio stations that have got English presenters ... what does accent matter?”*

Female, Stirling

*“Your local presenter should speak in a local accent. They know the area, and know what the people are looking for.”*

Female, Stirling

*“And the people, you get the impression, make, on the radio, broadcasting from Capital House, wherever it is, is that they’re Londoners. They might not have come from London but just the feel that you get from them is that they know the city; they know what’s going on. It’s not something they’re reading, they’re like a part of it, which I think that comes across. Like the call centres in India, they try their best and they’re polite and but they’re not a part of you, you know they’re not.”*

London DAB Group

These qualitative findings are supported by the quantitative survey (see Figure Fourteen). Two key points arise from the survey around the issue of news compilation on local radio:

- 63% say it very important / important that **news reporters** are based in the local area
- 71% strongly agree / agree with the statement ‘ If local news is covered, I don’t care where the **news reader** is’.

This demonstrates the difference in importance listeners place to compiling and presenting news. It is important to listeners that ‘local radio presenters have local knowledge and are able to pronounce place names correctly’, although more than half feel that a local radio station should be located ‘in or near to the area in which its listeners live’.

Figure Fourteen

## The Localness of Radio

Q How important is it to you that ....

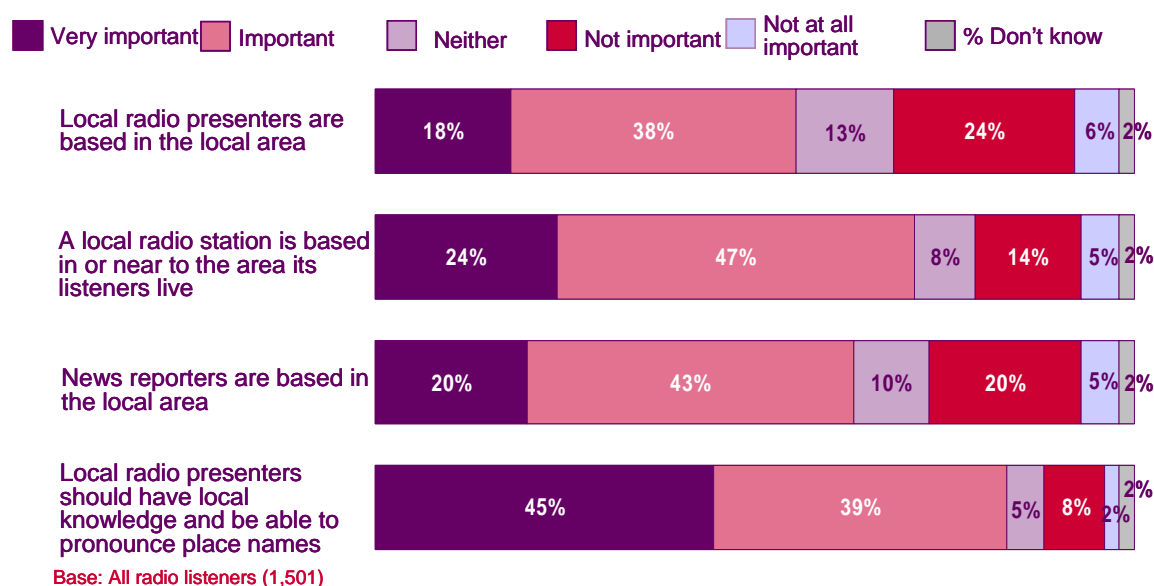
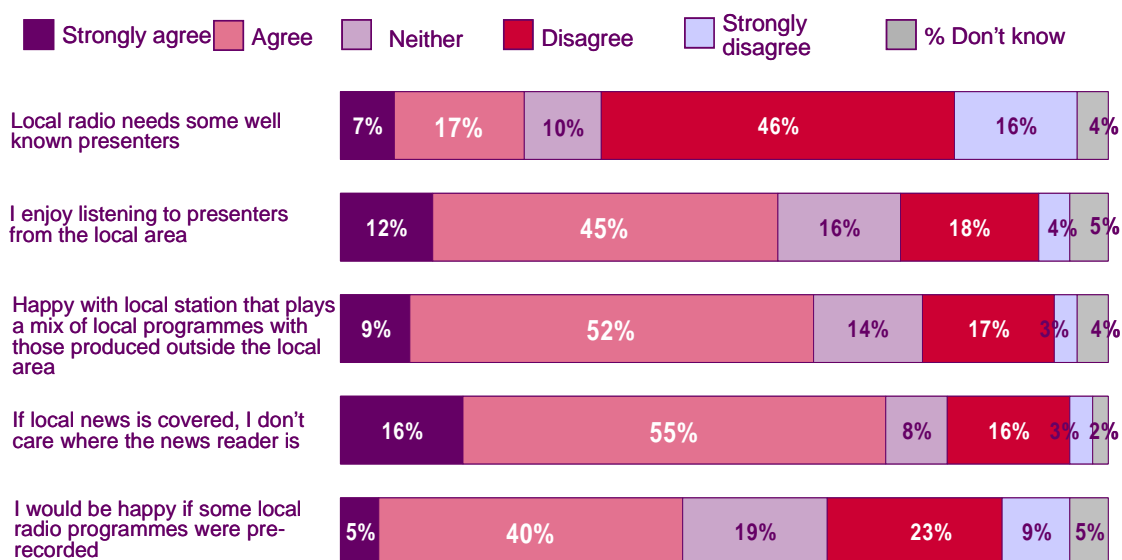


Figure Fifteen

## The Localness of Radio

Q How strongly do you agree or disagree with the following statements about the radio?



While initial reaction to the concept of automated programming was not positive, because it was felt to defeat the purpose of radio- 'might as well put a CD on' and would lose spontaneity, there was some disagreement as people thought it would be very difficult to know whether a programme is automated and might actually lead to better quality programmes because it is compiled in advance. The concept of automated programming is not always well understood. People often associate it with pre-recorded or repeated programmes. Among all radio listeners, more than two in five (45%) agreed with the statement 'I would be happy if some of the programmes on

## Radio – Preparing for the future

*my local station were pre-recorded'*, although 14% would not be – almost a quarter were neutral.

If was felt that this particular topic required further investigation with a more detailed explanation of the concept of automation. Follow-on research was conducted by MORI between 1<sup>st</sup>-3<sup>rd</sup> October 2004 using the MORI Telephone Omnibus. 1,000 adults aged 16 or over are questioned each week on the omnibus – as with the main survey the questions regarding automation were asked of radio listeners, a total of 924 respondents.

The questionnaire began by giving a more detailed explanation of what automation is:

*“Sometimes radio presenters or disc jockeys pre-record the talking between the music and records that they play. The radio station then broadcasts the pre-recorded parts of the programme automatically. This process is called automation. Automation does not apply to items such as news bulletins, live sports reports, weather forecasts and traffic reports.”*

We asked respondents if they are aware that some music programmes are currently automated. The results show that 57% claimed that they were aware, and 43% claimed they were not. What it is not possible to know from this survey is whether listeners can tell the difference between an automated programme and a live programme and so the results of this research should be treated with extreme caution.

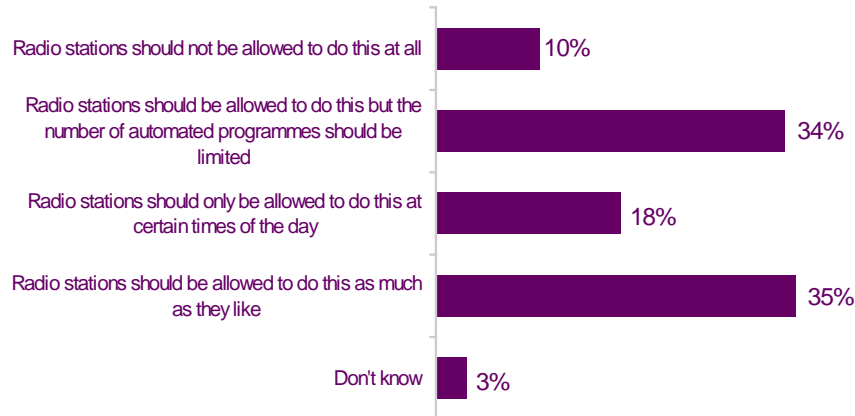
We then asked respondents about whether or not stations should be allowed to automate and whether there should be any restrictions in place. 10% of respondents thought stations should not be allowed to automate at all (this is on par with the 14% of respondents in the main survey saying they disagreed with the statement *“I would be happy if some of the programmes on my local station were pre-recorded”*). 35% thought they should be allowed to automate as much as they like without restrictions - men (40%), 25-34 year olds (39%) and AB (45%) respondents were more likely to agree with this statement.

52% thought that there should be some restrictions in place – 34% saying there should be limitations on the number of programmes automated and 18% felt there should be restrictions around the time of day stations are allowed to automate.

Figure Sixteen

## 52% of respondents say there should be some restrictions on the amount of automation taking place

Q Which of the following comes closest to your view about automation?



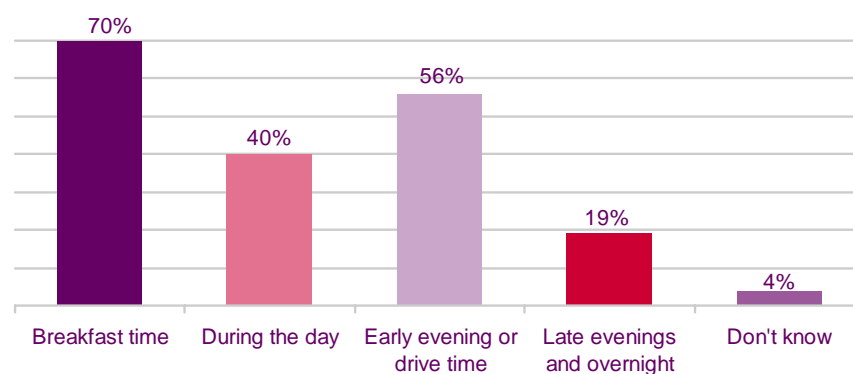
Base: Radio Listeners (924), MORI Telephone Omnibus (October 2004)

We then asked the 52% who thought that automation should be limited whether it was important for programmes to be live at particular times of day rather than automated. The results suggest that the majority of respondents think it is important for programming to be live at peak listening times. 70% thought that breakfast programmes and 56% thought drive-time programming should be broadcast live. In contrast only 19% thought it important to broadcast late evening programmes live.

Figure Seventeen

## Live programming is important during breakfast time and early evening/drive time

Q When do you think programmes should be broadcast live rather than be automated?



Base: Radio Listeners who think automation should be limited (475), MORI Telephone Omnibus (October 2004)

## Importance of radio coverage of local issues

When exploring which radio services are important on local radio, a similar pattern emerges to those regarded as important overall, with the provision of local news, local traffic and travel information, local weather and community issues regarded as the most important (see Table Eight). However, while few consider the provision of information on local events important in determining whether or not they personally tune into a station, more believe it important that these should be made available on local stations. This view was reflected in the qualitative phase where listeners said while they often tuned into local radio for the music, presenters, local news and traffic, it is important that local radio stations carry information on local events.

**Table Eight: Importance of issues being covered on local radio - Prompted**

Base: All who listen to local radio (1,146)	Very important	Important	Neither	Not important	Not at all important	Net score +/-
	%	%	%	%	%	%
<i>Local news</i>	40	54	2	2	1	+90
<i>Local traffic and travel</i>	37	50	3	7	2	+79
<i>Local weather</i>	30	51	5	10	3	+68
<i>Community issues</i>	24	57	6	10	3	+68
<i>Local events</i>	18	59	8	10	4	+63
<i>Local music / bands</i>	12	47	10	23	8	+28
<i>Live music</i>	12	45	11	24	7	+26
<i>Local politics</i>	14	42	8	23	12	+21
<i>Local film listings</i>	9	45	10	28	8	+19
<i>Local advertising</i>	8	46	11	25	9	+19
<i>Local sport</i>	17	37	8	25	13	+17
<i>Live comedy</i>	8	35	13	34	9	0
<i>Property</i>	9	30	10	35	15	-12
<i>Local celebrities</i>	3	26	11	39	20	-31

Source: MORI

Little importance is placed on hearing about property and local personalities on local radio, substantiated by insight from the qualitative phase. It was felt that local celebrities would not be very good, as any that are tend to leave the area.



## Satisfaction with services

In the qualitative discussions, people expressed contentment with the current provision on the radio: the channels; choice and information available. There is felt to be a diverse enough range of styles of music and types of programme to suit everyone.

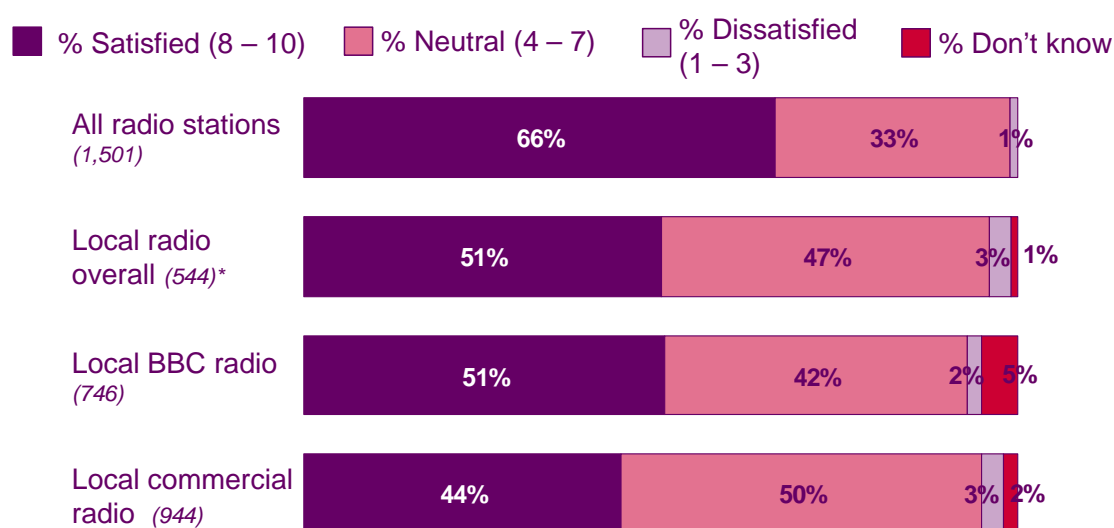
This is reflected in the quantitative survey which records substantial satisfaction in the current provision of radio services. Across all radio stations generally, two-thirds (66%) are satisfied, a third (33%) are neutral and just 1% of listeners are dissatisfied. Heavy radio listeners are more satisfied with the current provision than those who listen for only a few hours in a typical week, perhaps indicating that the radio very successfully fulfils its background role, while not always being so successful when meeting the needs of those searching for a specific service or type of music.

Being a background activity for many listeners, the radio is more likely to satisfy (or less likely to dissatisfy) than when full attention is given to the entertainment platform, as is the case for television viewers. Results of research conducted by Ofcom amongst viewers as part of the Public Service Broadcasting Review<sup>4</sup> showed that 61% of the UK population is satisfied with television provision, 15% is neutral, 13% is dissatisfied and 11% answered 'don't know'.

Figure Eighteen

### Satisfaction with Radio Service Provision

Q On a scale of 1 – 10, how satisfied are you with what you listen to on the radio?



Base: All who listen to each type of radio (number in brackets)\* based on those who listen to both BBC & commercial local radio

Satisfaction is lower with local radio than for the radio overall, although around half (51%) are satisfied overall with local provision and again there is very little dissatisfaction. It is clear from both elements of the Radio Review research that users have clear demands of local radio but that these vary immensely between individuals. Each individual wants a particular mix of music, local news, weather and travel for example, depending upon what is relevant and of interest to them.

<sup>4</sup> Ofcom Review of Public Service Television Broadcasting – Phase 1, Is Television Special?, Ofcom, June 2004

## Radio – Preparing for the future

The Disengaged are *least likely* to be satisfied with local BBC (25% satisfied, compared to 59% of Community Cohorts, who listen to most local radio).

Overall, however, there is widespread satisfaction with all local radio services, particularly with those that are considered both most important to be provided on local radio (see Table Eight) and those local issues which listeners are most interested in hearing about (See Figure Eleven).

**Table Nine: Satisfaction with local radio services**

Base: All who listen to local radio (1,146)	Very satisfied	Satisfied	Neither	Dis-satisfied	Very dissatisfied	Net score +/-
	%	%	%	%	%	%
<i>Local news</i>	23	64	6	5	*	+82
<i>Local traffic and travel</i>	24	61	6	5	1	+80
<i>Local weather</i>	20	65	8	4	1	+80
<i>Local events</i>	10	63	13	9	1	+63
<i>Community issues</i>	9	59	15	12	1	+55
<i>Local advertising</i>	8	55	19	9	2	+52
<i>Local sport</i>	13	48	22	8	2	+51
<i>Local politics</i>	6	49	23	13	2	+40
<i>Live music</i>	7	45	25	13	2	+37
<i>Local celebrities</i>	4	42	33	8	2	+36
<i>Local film listings</i>	5	45	26	12	2	+35
<i>Local music / bands</i>	5	42	25	16	3	+29
<i>Property</i>	4	37	31	14	2	+24
<i>Live comedy</i>	3	36	33	15	2	+22

Source: MORI

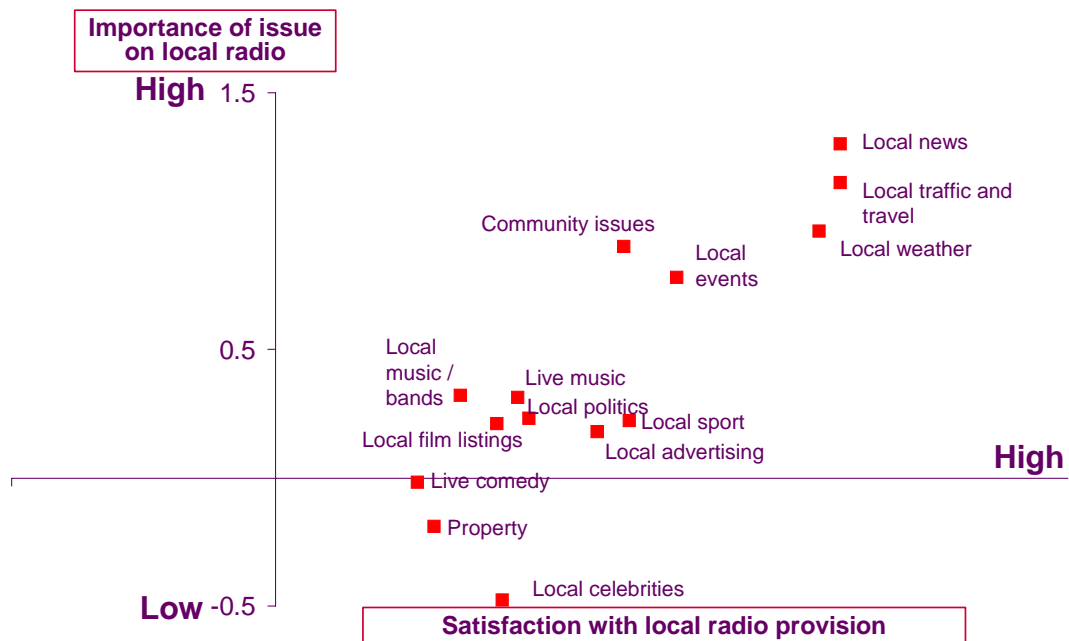
It is satisfaction with the local issues that are both of interest to listeners and considered important to be provided on local radio which drives overall satisfaction with local radio. The following scatterchart (see Figure Nineteen) plots the importance that local radio listeners place on an issue being covered (on the vertical axis), against their level of satisfaction with current local radio provision of the issue (on the horizontal axis). Therefore, those issues that appear towards the top of the chart are those which local radio listeners believe are important and those to the right of the chart are those which listeners are most satisfied with. A score of below zero on the vertical axis indicates that more listeners consider the issue to be unimportant than important, while for no issue does dissatisfaction exceed satisfaction.

The scatterchart identifies that the three issues which are considered most important to be covered by local radio (news; traffic & travel; and weather) are also those which

listeners are most satisfied with. Community issues and local events, both considered important are also among those issues with which listeners are most satisfied with too.

Figure Nineteen

## Importance of issues on local radio and satisfaction with current provision



Supporting this, people in the radio workshops are generally happy with local provision on the radio and find it difficult to think how local radio could be improved. Where there is criticism it is to do with the types of music played, repetition of records, the length, repeating and frequency of the adverts, and DJs cutting into the record before it has ended.

There are also some criticisms of local radio from some of the younger participants who perceive local radio stations as unprofessional, boring and parochial. These younger respondents claimed not to listen to local radio or consume local media, because it did not relate to them, for example not playing the types of music they wanted. These younger people prefer to consume national media aimed at their taste in music and chat, rather than a local 'catch all' station.

### Improvements to local radio

On the whole people are happy with their local radio service provision. However we continued to probe respondents for any suggestions of things radio could do more of. Ideas included:

- showcasing and promoting local talent;
- broadcasting more news about local events in advance so listeners can get tickets and information;
- encourage more participation from the local community in terms of phone-ins and requests;

## Radio – Preparing for the future

- have more competitions about local events;
- broadcast more services for specific local audiences such as children and women; and
- make sure the programming relates to peoples' local sense of humour.

There are mixed views on whether there should be more community involvement in local issues and decisions about policy. Some older participants believe this would be a good idea, for example hearing about local council decisions and its likely impact, whereas others thought it would lead to very boring radio. In the Belfast radio workshops, younger participants often expressed views that increasing the number of local media outlets may lead to more political discussions, which they felt they had too much of anyway.

However, in the Scotland and Northern Ireland workshops in particular, it is felt that radio could have an important role in encouraging community cohesion, and that any local station should be a visible presence in the local area. Any local radio station should also help to build 'community spirit' and create pride in the local area to *'make us feel better about ourselves.'*

*"At the local station... they say 'come and visit us'."*

Female, Stirling

People are more likely to have a 'citizen' view of local radio, wanting it to cater for a cross-section of community. They, therefore, believe that it is essential for any local service to cater for all ages and be accessible. However, it was also pointed out that this can be very difficult to achieve as only certain types of music appeal to certain age groups.

A local radio service should have personable, up and coming presenters rather than 'failed' presenters from national radio. There were often underlying perceptions that local radio stations are less professional than national stations and do not have the same level of resources. Any talented local presenters are felt to leave the area and go to national stations. Just one in four (24%) of radio listeners feel that local radio *'needs some well-known presenters to make it worth listening too'*, with three in five (62%) disagreeing.

## **B6 Digital radio**

Digital radio was developed in the UK throughout the 1990s and currently reaches around three-quarters of the UK population. The UK is now the leading market for digital radio in Europe.

Digital radio is accessed in three different ways:

- Digital television either through satellite, cable or Freeview;
- The internet; and
- DAB sets either standalone, portable or in car.

MORI undertook two focus groups with DAB set owners, one in London and one in Manchester, which focused on why people had bought sets, what they thought of the services offered and views about DAB in the future. The findings from these focus groups makes up the greater part of this chapter, but also included is some data from both the workshops and the survey, in both of which people were asked about their level of awareness of digital radio, whether they accessed digital radio through television or the internet, and reactions to future changes in technology.

### **Awareness of digital radio and DAB**

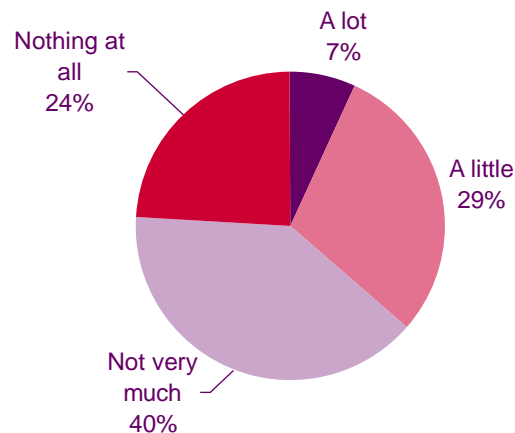
There is substantial awareness of the term 'digital radio', with more than nine in ten (92%) stating that they had heard of it prior to participating in the Radio Review survey, with those from social classes ABC1 being more likely to be aware (95% compared to 90% of C2DEs). Heavy radio listeners who tune into radio for more than 28 hours per week are also more likely to be aware of the term (95%).

Despite high awareness of the term, few radio listeners claim to know much detail about digital radio (see Figure Twenty), with less than one in ten (7%) saying they know a lot about the technology, while three in ten (29%) claim to have a little knowledge. Half (48%) of men know at least a little about the technology, while those aged under 25 years (45%) are also more likely to have some understanding.

Figure Twenty

## Awareness of Digital Radio

Q How much would you say you know about digital radio?



Base: All Radio Listeners (1,501)

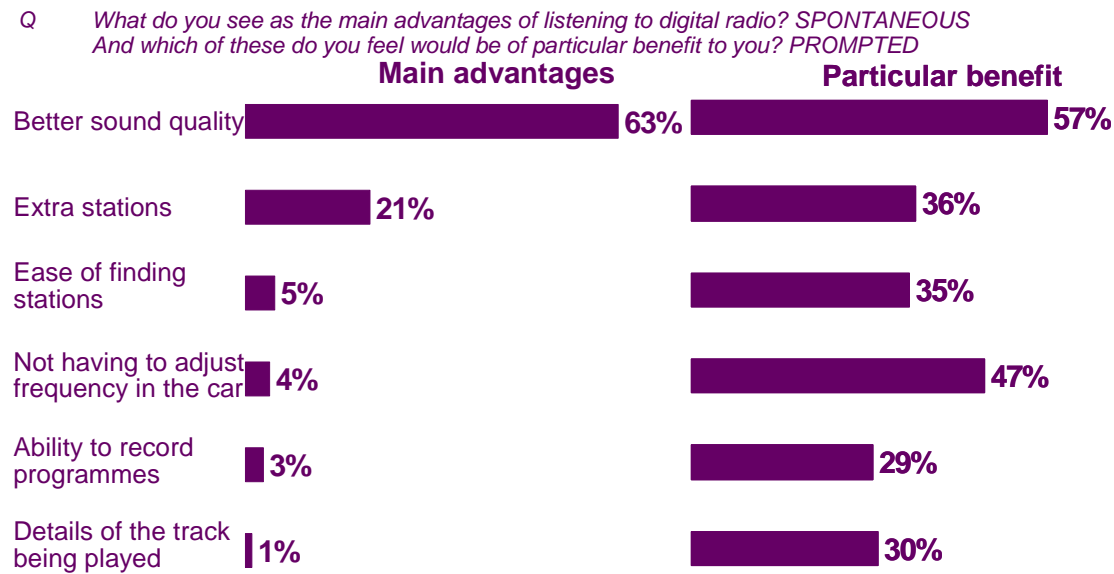
The quantitative results reinforce findings from the qualitative work, where there was also high awareness of the term 'digital radio' but a limited understanding of the specific features and benefits that this technology offered over traditional radio services. The benefits of digital radio are generally *presumed*, rather than known, to be of better quality than analogue radio. This is based upon a more widespread understanding that digital television provided a better picture and sound quality than analogue television.

Once again, this qualitative insight is substantiated by the quantitative results. Among analogue radio listeners who know at least a little about digital radio, almost two-thirds (63%) cited better sound quality, three times more mentioned than extra stations (21%). Beyond these two advantages, there is very little understanding at present of other benefits of a digital radio set, with only around one in twenty mentioning the ease of finding stations (5%), not having to adjust radio frequencies while driving (4%) and the ability to record radio programmes (3%).

However, the list of potential benefits offered by digital radio generated a great deal of interest with many analogue listeners feeling these would offer benefit to them (See Figure Twenty One).

Figure Twenty One

## Awareness of Benefits of Digital Radio?

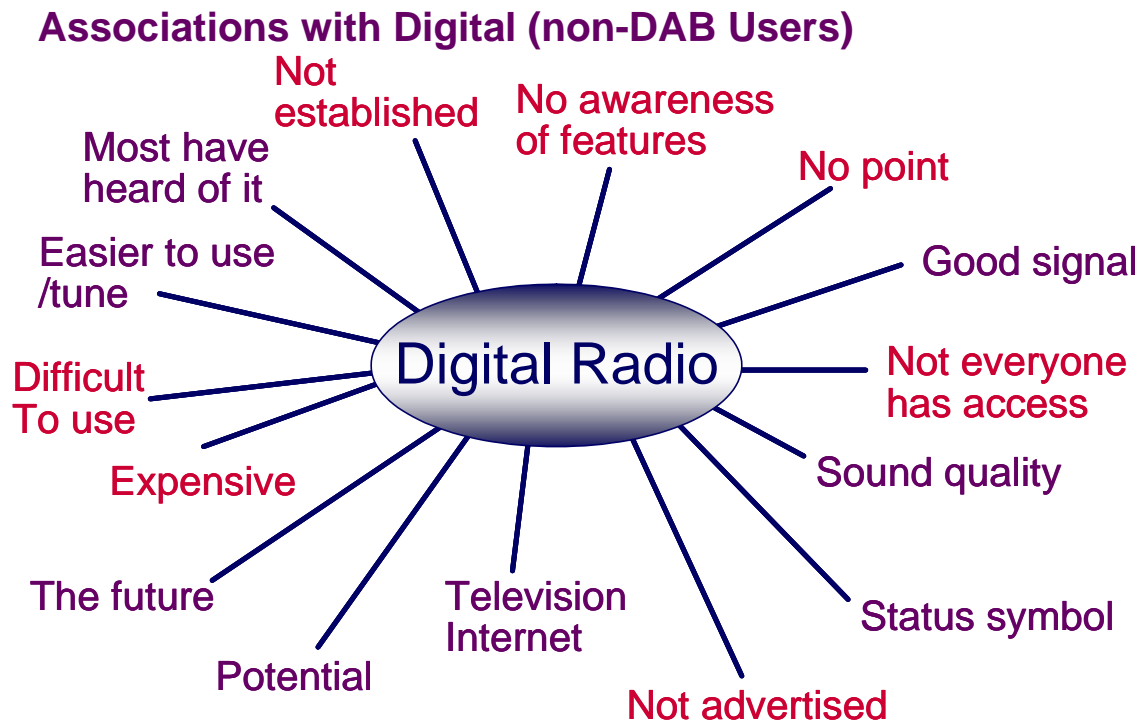


Base: All analogue radio listeners who know a lot / a little about digital radio (144)

## Barriers to adoption

The qualitative workshops provided some further insights into both positive and negative impressions of digital radio, among analogue users.

Figure Twenty Two



**Positive** associations with digital radio and DAB sets were:

- Improved sound **quality** and better **signal**;
- **Easier to tune** and improved usability in general;
- Access through **TV and internet**;
- **Greater choice** of channels. Again this perception is driven by the knowledge there are more TV channels on digital TV in comparison to terrestrial television;
- **A status symbol** for those who have access to it;
- The future of radio - "**Everything is digital now**".

However, some substantial concerns and negative associations were also apparent from the qualitative phase, which can be summarised as:

- Lack of familiarity with technology leads to a fear that it might be **difficult to use**;
- A perception that it is expensive, most believe that the **cost would fall quickly**, with several citing DVD players as an example of a similar technology which replaced the near ubiquitous video player, once costs had fallen far enough;



- Poor **digital radio reception** in their area, particularly in the more rural areas;
- A conception that there are **less channels available** on digital radio than on analogue radio;
- That it is yet to be established and in its **infancy**;
- That it is a ruse by set manufacturers to make more **money** by forcing people to pay to upgrade their radios;
- That there is little need for digital radio as people are **happy** with the range of stations they currently listen to; and

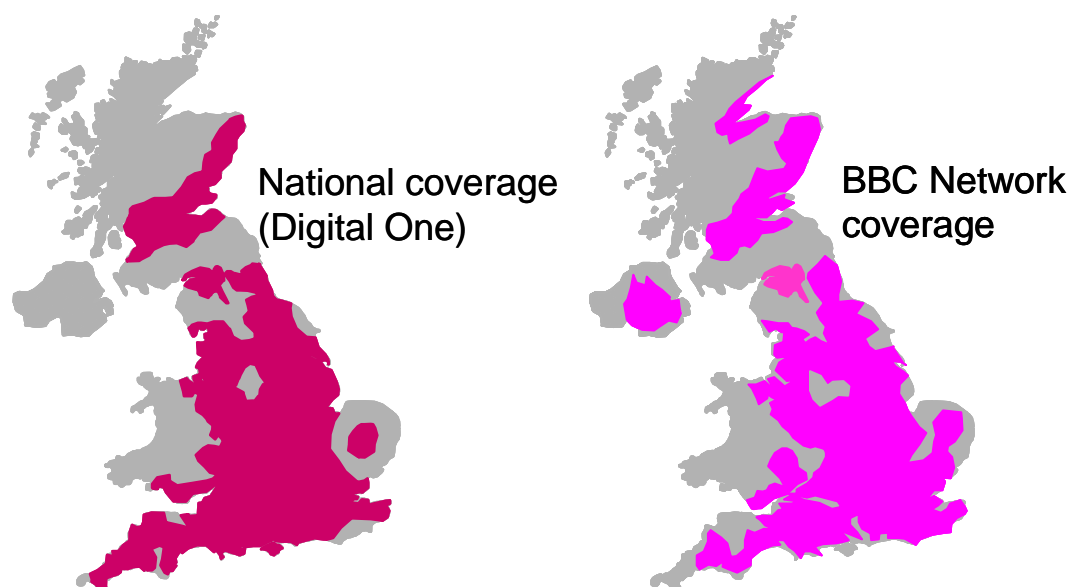
*"I listen to radio on the move, I listen in the car, I listen on my Walkman, and I don't really sit down and concentrate on the sounds. I concentrate on something else . . . like driving . . . so what's the point?"*  
Watford

- Another new device that not all people will have access to – it would therefore **exclude** some groups of people.

At the moment non-users see digital radio as not yet established and quite a niche product, bought by early technology adopters and people who wanted it as a status symbol. There is felt to be a distinct **lack of advertising / marketing** of the features or benefits of digital radio.

Awareness of the term 'DAB digital radio' is much lower than for 'digital radio' overall. A little over half of all radio listeners (56%), are aware of the term. The profile of those who are aware reflects those who tend to be interested in technology in general: young men are far more likely to be aware of the term, than women, or older listeners. Awareness is also much higher in England (58%) than in Scotland (43%) or Northern Ireland (33%) (see Figure Twenty One), although there is no difference in awareness among those living in urban or rural locations throughout the UK.

Figure Twenty Three



## Radio – Preparing for the future

Indeed, in the qualitative workshops, there was some confusion over what DAB units were, indeed, some people thought that digital radios were simply those with preset stations or with digital LCD displays.

There was some awareness of the price of DAB sets within the qualitative workshops - and they are thought to cost around £100. This is felt to be far too expensive particularly in comparison with the cheap analogue sets that can currently be purchased.

*"I think the 10 or 15 radio channels I've got on my little radio are sufficient for me, it's better than £120 for another 20 channels I don't even want to listen to."*

Male, Watford

*"I wouldn't get one because my radio where it is in my room works fine, I don't notice any hissing or anything, so for fifty quid, it's not worth it."*

Female, Nottingham

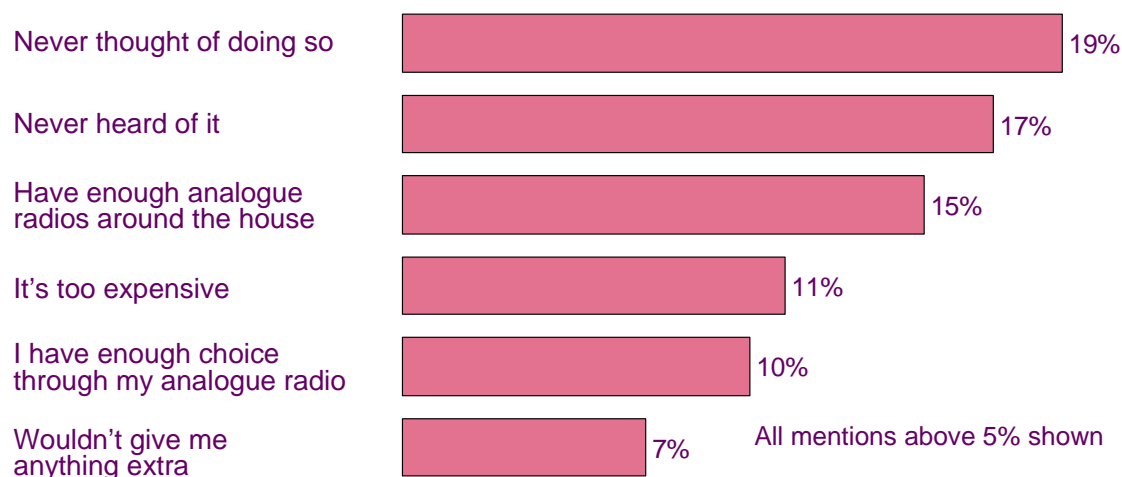
However, digital radio and DAB sets are seen as the future. There is a sense that everyone could get a digital radio eventually once prices dropped in the same way that other equipment had been introduced. Despite this there are some concerns that digital radio will be forced on people as the analogue signal gets turned off.

Lack of awareness, lack of need and cost summarise the key barriers to uptake of a DAB radio among those currently restricted to an analogue radio service, including those in homes with multi-channel TV, or internet access.

Figure Twenty Four

### Barriers to Uptake of DAB radios

Q Why do you not have a DAB radio?



Base: All analogue radio listeners (679)

Older analogue listeners are particularly likely to be satisfied with the current provision of analogue stations, with more than one in ten (12%) citing this as a reason for why they do not have a DAB digital radio, with those listening to less than seven hours radio per week also more likely to cite this.

Figure Twenty five below summarises the barriers highlighted by quantitative research along with suggestions around how these barriers could be overcome.

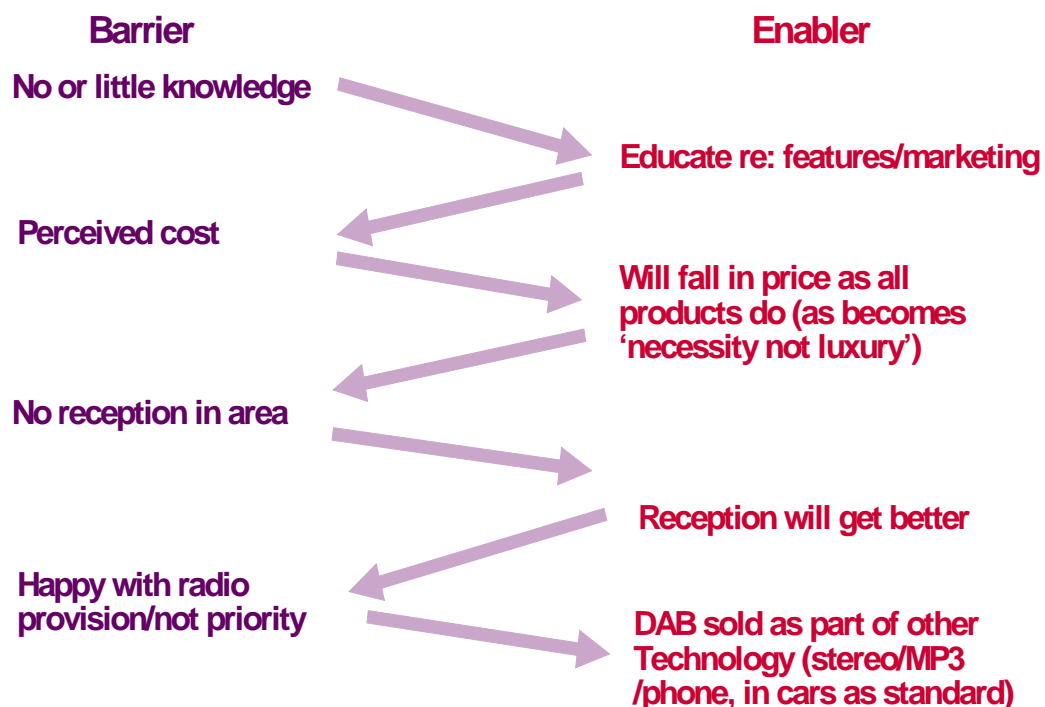
### Digital radio platforms

Traditional AM / FM radio continues to be the dominant platform through which listeners access radio programmes, with almost all (99%) having done so. Around one in five (18%) have *ever* listened to the radio through a mobile phone, particularly among those aged under 25 (39% having done so). Almost six in ten (57%) have accessed digital radio through any platform, with the digital radio through the television (46%) and the internet (25%) the most common.

Less than one in ten (8%) have *ever* used a DAB digital radio to access programmes, with those aged 16 – 24 (13%) twice as likely older people to have done so. Heavy radio listeners are also more likely to have done so (11%), perhaps relishing the wider choice made available, although they are no more likely to listen to digital radio through the other two platforms.

In the workshops and DAB groups, participants with digital TV and access to the internet recognise that new technology had had some impact on the way they listen to radio.

## Attitudes to Adopting New Products



Those who work at home or are on their computers a great deal of time reported listening to radio via the **internet**. It is felt to provide a greater **choice of stations** and is an easy to listen to whilst working or playing with the computer.

- **Mobile phones** have provided a new way to access radio. There are participants, in particular in the younger age groups who have listened to radio via this method, especially when travelling on trains or buses. However, this is seen sometimes as a 'gimmicky' feature of mobile phones.
- **Digital TV** is used by participants to access digital radio. Participants tend to use digital radio stations on their televisions while channel hopping if there was nothing entertaining to watch. There are also people who used digital radio via their TV when doing other activities such as housework or studying. The sound quality is felt to be better and there are also more stations available. Some participants explained how they had changed the set-up of equipment in the living room with some using the DVD player to listen to CD's and others who have taken their radio out of the living room because they could now listen to stations through digital television.

"I put the radio on through my Sky and do the housework."

Female Oldham, Middle Aged

There is some awareness amongst people who did not have internet access or digital TV that it was possible to listen to radio through these methods. There is a belief that converging technology in the future will result in computers converging with televisions and including radio in one overall media centre.

However, participants feel that changing listening habits are also due to changes in their lifestyle and their progression through life stages. As their tastes and needs change over time they find both radio stations and methods of listening change too. For example, there are participants who report listening more to the radio in cars than they used to or in different rooms of the house because the children were watching the television. Similarly, there were participants who believed that the types of music and programmes they listened to on the radio had changed over time.

"And I've found that I've mellowed a lot . . . and then like you said about the classic, I can't believe I'm listening to Classic FM and Radio 4 . . . I'd rather listen to somebody talking for an hour and having a discussion and a debate about fishing off the coast of Scotland and all that. It's what's going on in this world. I find it really interesting, whereas 10-20 years ago I was like, I didn't care about anything like that."

Manchester DAB Group

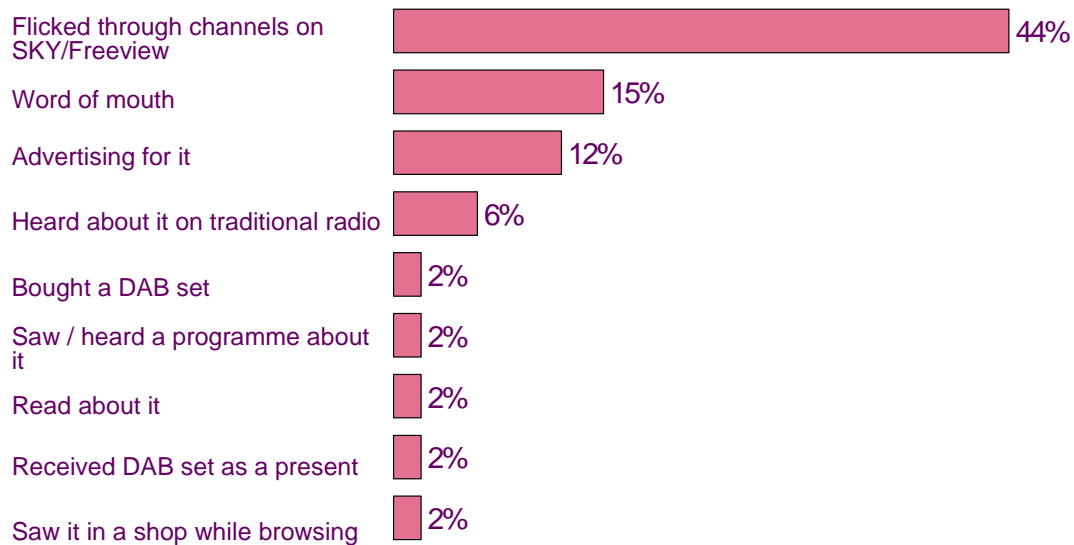
Among those listening to digital radio, over half (53%) have been listening to the digital service for less than a year, with only two in five (41%) listening for more than two years. DAB users are more recent users of digital radio, almost three-quarters (77%) having listened to digital radio for a year or less.

Both the quantitative and qualitative phases of the research indicate that awareness of digital radio is often prompted by flicking through channels on digital TV. Many workshop participants stated that this was where they first came across digital radio and upon which much of their knowledge was based. The quantitative survey also supports this, with two-fifths (45%) of those listening to digital radio first coming across it through flicking channels on a digital television service (see Figure Twenty Six). Word of mouth is the initial source of information about digital radio for around one in six (15%) of respondents, but only one in ten (12%) has been made aware through traditional advertising.

Figure Twenty Six

## First come across Digital Radio

Q How did you first come across digital radio?



Base: All digital radio listeners (822)

Those using DAB radio sets were most likely to have been made aware through traditional advertising (24%), with word-of-mouth of particular importance to these users (17%). This further supports the qualitative work, which identifies that current DAB users are acting as true advocates of the technology, making non-users in the workshop aware of some of the functions and benefits of using digital radio and DAB sets in particular.

During the qualitative phase, DAB owners described a number of ways in which they came to own sets:

- Discovering digital stations through the internet or digital TV and becoming aware of the number of extra channels and better sound quality.

“Driven by listening on TV: I mean it was as I say I watched the radio on television, it was Radio 4 . . . that’s what I was looking for first and then I found the others and I just thought it was too good to not have such instant access to it really. And to be able to get it wherever in the house.”

Manchester DAB Group

- Unintentional ownership. There were participants who had received DAB radios as presents bought by friends or close family. One respondent reported that it came with his new car.

“Well, mine come with the car, it was sold with the car, but it’s the same again, you don’t realise what you get with it.”

London DAB Group

- Browsing in a shop. There are participants who had been browsing in their local high street retailers and had played around with the DAB sets. Being impressed by the sound quality and features, they had bought one on the ‘spur’ of the moment. Similarly, one participant who had gone to replace his in-car system and, on hearing a DAB car system demonstrated in his local dealer, had immediately purchased it.

## Radio – Preparing for the future

*“Well, I just went in the shop. I said I wanted a radio, a radio cassette with a 10-disc changer, and the guy just said, ‘Have you considered digital?’ Well, what’s digital? Does it sound any better than what I had before? And when he put it on, I was like [respondent gasps]. He said, ‘Look, can you hear any hissing at all?’ I said, I can’t. The music was so clear; it was like on a CD. I could not believe it could be so clear and then that was a radio. No way.”*

London DAB Group

*“I couldn’t listen to a normal analogue radio after that. It just, it said, look, buy me now. It reminds me of when a guy came to our house once and was selling us a Hoover years ago. He cleaned a little spot there, so you had to buy it.”*

London DAB Group

- To get better reception than old analogue sets. Some in the London group reported poor reception on their existing analogue radios because of the closeness of other buildings and living in ‘dips’. They made a purchase, believing a digital signal would be stronger.
- A number of the respondents in the DAB groups described themselves as ‘musos’ and wanted the best possible sound, whether it was from a Hi-fi, television or radio and had bought a DAB unit knowing of its better quality sound. Allied to this were ‘early adopters’ – people who always liked to buy the latest technological gadgets. There were also ‘radio enthusiasts’ who were heavy radio listeners and therefore considered that the extra investment in a DAB set was worthwhile:

*“I think [it was] about 99 quid or something. It seemed quite a lot when you could get a standard radio, you know, a decent one for £40, so I was paying over double, but I just felt I’d like to pay a bit more cos I do listen to radio a lot . . . it’s several hours a day probably I’m listening to the radio and working in the kitchen, things like that.”*

London DAB Group

- Finally there were a number of people who like the aesthetic appeal and ‘retro’ design of the DAB sets and bought on this basis rather than the features available. These people are especially positive about the solid design and wooden features of the sets.

*“They’ve gone away from all these big, bulky stereo looking kind of things and they sit quite nicely now on your bedside cabinet.”*

Manchester DAB Group

*“I’ve got mine in the kitchen permanently on show. I’ve spent a bit of money on my kitchen so I’ve got a nice, what I consider a nice kitchen. I don’t want a naff looking old battered radio . . . sat there.”*

Manchester DAB Group

### Purchase decision making

Generally, participants feel that they were unlikely to purchase a new radio in the near future.

*“I don’t buy radios, I just come across them. I can’t remember when I last bought a radio – although I have got a lot of them.”*

Female, Nottingham

Rather than seeing it as a separate purchase, participants are more likely to buy a radio within a larger music system where they are also able to play CDs, MP3s etc. Similarly the provision of radio channels within cable and satellite digital TV packages and on Freeview is seen as an added extra but is not the reason why people accessed multi-channel TV services. A radio within any kind of larger system is seen as an 'added extra' rather than a key factor in the purchase decision.

When participants are asked about the key features that were important when considering buying a new stereo, appearance is often cited. Other factors that people take into account when buying a stereo are the quality of the sound, the price of the stereo and its ease of use.

"Just something which is good quality, something easy to use, something that looks good . . . in the kitchen it doesn't need to be, cos in there you've just got a small radio, I'm not bothered, but in the lounge, in the bedroom, especially in the lounge, we've got a really good system so, and it needs to look cool, look good."

Watford

People often have a number of radios throughout their house and occasionally have difficulties remembering how many they had. Radios are regarded as a very cheap item and, therefore, disposable. However, it was pointed out that radios tend to last a lot longer than other pieces of electrical equipment and rarely need replacing.

*"My dad's got a radio that's about 25 years old, but it still works and as long as it works, he doesn't care. It's huge and covered in paint."*

Male, Watford

Analogue listeners were asked in the quantitative survey their likelihood of accessing digital radio over the coming twelve months. Despite the belief that features of digital radio might provide particular benefit to them (see Figure Twenty One), there are no substantial plans among analogue listeners to access digital radio through the internet, digital TV or DAB sets. Fewer than one in ten analogue listeners (8%) is certain to access digital radio through either digital TV or the internet in the coming twelve months, with a similar proportion (7%) very likely to do so. Almost half (44%) are certain or not at all likely to access digital radio through these platforms.

Fewer still are likely to buy a DAB set in the coming twelve months, with just 1% certain and 3% very likely to do so. Half (51%) are certain or not at all likely to purchase a DAB set.

**Table Ten: Likelihood of listening to digital radio among analogue radio listeners**

	Digital Television / Internet	DAB radio set
Base: All analogue radio listeners (665)	%	%
Certain to	8	1
Very likely	7	3
Likely	12	9
Not likely	24	30
Not at all likely	23	26
Certain not to	21	25

Source: MORI

Those from the higher social grade, AB, are most likely to be certain or very likely to access digital radio in the coming twelve months, reflecting the greater purchasing power of these people.

Few digital radio listeners currently without a DAB set either are likely to purchase a set in the coming 12 months either, with just 2% certain to and 9% very likely to do so. Four in ten (39%) are certain not to or not at all likely do so.

**Table Eleven: Likelihood of buying a DAB set among current digital TV or internet radio listeners**

Base: All digital radio listeners who don't own a DAB set (691)	%
Certain to	2
Very likely	9
Likely	15
Not likely	30
Not at all likely	29
Certain not to	10

Source: MORI

However the results of the quantitative study suggest the digital television plays a key role in introducing people to digital radio. 39% of analogue listeners with multichannel access say they are certain to / very likely / likely to listen to digital radio through digital TV or the internet in the next 12 months – but only 12% say they are likely to purchase a set. Having first experienced digital radio via the TV or internet, digital radio listeners who do not currently own a DAB set are also more likely to purchase a set (25% certain to / very likely / likely) compared with analogue listeners (13%).



Without increased promotion on the part of both manufacturers and retailers, identifying the benefits of digital radio over analogue services, it is unlikely that uptake will rise sharply among either analogue or digital listeners in the next 12 months, although word-of-mouth recommendations will provide a spur to uptake.

Word-of-mouth will be an invaluable aid to the marketing of digital radio, and DAB sets in particular. DAB set users in the qualitative workshop and focus groups were almost 'evangelical' about their sets and could not imagine going back to analogue radio. DAB users are extremely attached to their DAB sets and when they do use analogue radio, for example if they were in another area of the house, they found it a frustrating experience.

*"It's like going back from colour to black and white, isn't it?"*

London DAB Group

Current DAB users do not think DAB sets were **marketed** properly, with no overall body seemingly in charge of pushing it forward. Messages are not clear and its advantages are not promoted, despite it being considered an easy concept to communicate with strong messages about the extra channels, sound quality and ease of use. Users believe this is inhibiting more widespread uptake of the technology

*"DAB, it's not explained, it just isn't explained and I'm probably just Joe Average to do with technology and more than most and maybe not as much as others but the idea of the digital and the airwaves and how and why it does this and why it does that I can get it, I grasp it, but I had to go and find that out and I'd been sat there with my cable and gone, hang on a minute, why is Radio 5 crystal clear? I've seen DAB all over the Argos catalogue but nothing to say and this is what it is."*

Manchester DAB Group

*"But I just can't believe that this DAB, if you stopped anyone out there and said what do you understand by the word DAB ... stain removal or something like that."*

Manchester DAB Group

DAB users suspect that ordinary members of the public have little idea of advantages of the sets and that take up is very low. It is also perceived that not everywhere in the country could receive a DAB signal yet and that not all stations were broadcasting a digital signal.

*"I've read in the paper reports in the last six months or something and I think I'm getting the gist that overall the industry's a bit disappointed with the fact that the population isn't saturated with digital radio. It hasn't been quite the success that it was planned to be."*

London DAB Group

Given the sound quality and functionality of the sets, it is felt there should more demonstration in stores and supermarkets. Other suggestions are television adverts, internet adverts and of course adverts and campaigns on analogue radio. There are participants who wondered whether radio was actually the right description for DAB as radio was an old fashioned term and was perhaps a reason why digital radio had yet to establish itself.

*"I think you said something very interesting. The name radio is quite old-fashioned but I think that's the whole purpose for the digital technology. So the radio no longer stays a radio, you can do other things with it. You once*

*give it the machinery of digitalism, and you can do, it's no longer a radio, it has other functions."*

Non-DAB users express similar views about marketing, saying they have not heard of its benefits and the services offered, although there is some limited recall of the BBC's campaigns.

Perhaps lessons can be learnt from the promotion of digital TV, in which the advantages were highlighted to users in many ways, including in-store promotion, television advertising and in-show promotion of interactive services which led to a widespread understanding of what was available and helped to drive uptake, although, of course, impetus in the television market was also provided by the highly subsidised upgrade of analogue satellite receivers to digital.

### **DAB user's experiences**

Reflecting the poor awareness and understanding of digital radio and DAB sets, overall expectations of the DAB units on the market is fairly limited prior to purchase, and users did not have particularly strong knowledge of the features. However participants described the gap between expectations and experience of DAB services. For example, users realised there would be better quality reception and sound from the units, but were surprised how good the sound was. The improvement in the quality of sound from stations such as Virgin and Radio FIVE LIVE were particularly noted. Respondents particularly liked the fact that the signal did not 'drift', that there was no interference or crackling, and that the sound was 'crisp' and crystal clear. Indeed, some of the more technical 'musos' in the London group felt at times that the digital sound was too sharp and did not always have the warmth and bass of analogue broadcasts.

*"It's really clear, to the point where you think, is this a radio or is the person right in front of you."*

London DAB Group

*"I think the only downside to digital, I might be getting a bit, might be criticising it too much, is it can tend to sound rather sharp, rather, not as warm as analogue . . . Like if you listen to somebody's voice, it's crystal clear but it's not warm sometimes, not got that nice richness about it, whereas analogue has." London DAB Group*

Similarly, people knew they would be able to receive more channels but were surprised at how many more channels there were and the choice, content and diversity of the channels available. They were also impressed that they were able to listen to stations in some areas where they could not previously.

*"You've got the quality of the local stations throughout the country. Like Capital FM, the big London one ... listen to that, just somewhere different but still maintain the quality."*

Manchester DAB Group

*"I was intrigued, some of the channels I'd heard of, but there were more channels, things like FIVE LIVE sports extra and I'd heard about BBC6 and 7 but I didn't realise how many different channels there were until I bought it. I thought there'd be your BBC1, a couple of local ones, but I didn't realise you were getting 20 odd, whatever there is, there's tons. I've not even listened to all of them . . . I was, yeah, really, really quite surprised."*

## Manchester DAB Group

DAB users were positive about track listings, name of DJ, and next show on the text screen, although were less positive about unrelated information on the screen such as news. As before, these features were an unexpected bonus.

*"I just thought it would be better sound. I wasn't aware that the BBC are showing you the songs and you can see all the artists and everything. I just thought it would be a much better quality sounding system for a small unit . . . So I expected a radio of just decent sound quality and I was pleasantly surprised with some of the other features that it does include".*

Manchester DAB Group

*"And I didn't know much about it. I only listened to it in the shop and thought, that's really clear. But it had all the host of the other features that you get with it, it was kind of mind blowing."*

London DAB Group

Finally there was an expectation that sets would be easier to use, but again users were surprised just how easy it was to change channels. One user with a DAB stereo in his car noted how the set automatically tuned to the strongest station as he was driving around the country. Another explained how they would scroll through channels and simply hit the memory button when they found a channel they liked.

*"For me digital radio has enabled me to access all these other channels far easier, a lot easier. And rather than searching through trying to find a frequency and a number you can just hit a button and it's there."*

Manchester DAB Group

These insights are quantified in the survey. Among DAB users, more than half (56%) cite better sound quality as the most important advantage of listening to digital radio, with around one in ten believing it to be the ease of finding stations (13%), the extra stations made available to digital listeners (13%) and not having to adjust the frequency while driving (9%). Those accessing digital radio through the television and internet also feel improved sound quality (46%) to be the key advantage.

**Table Twelve: Most important advantages of digital radio**

	Digital TV / Internet radio listeners	DAB set owners
Base: All digital TV / internet radio listeners (799)	%	%
All DAB set owners (145)		
Better sound quality	46	56
Not having to adjust the frequency while driving	14	12
Ease of finding stations	13	13
Extra stations	14	13
Details of tracks being played	3	3
No advantages	6	2

Source: MORI

## Radio – Preparing for the future

Digital radio listeners aged 35 and over are more likely to believe better sound quality to be the key advantage (52% compared to 38% of younger listeners), while those aged under 35 are more likely than older listeners to consider extra stations to be the main advantage of digital radio (18% compared to 10%).

DAB set users reported an increase in radio listening after purchasing their set. This was for a number of reasons:

- The listening experience becomes more pleasurable due to the increase in sound quality;
- The sheer number and variety of channels available;
- It is easier to switch between channels and store channels on presets;
- It is possible to 'stumble across' and find new channels;
- Those with DAB sets in their cars reported particularly listening to radio more because there was no need to retune whilst travelling around the country.

DAB users are very willing to try out new stations and believe they had come across new types of music. Those with DAB sets reported that they do not listen to their CD collections as much nor buy as many CDs as previously and also watched less television.

*"So at times, there's been times when I have switched the radio off. With the digital now, you've got such a wide range of choice that if you sat down with it, you want to listen to the radio, there's something there to suit everybody. And I think that's the beauty of it really."*

Manchester DAB Group

The existing station brand names tend not to be a key motivator to listen as people are so willing to try new stations. However, they do help respondents to know what sort of music was being played. For example, people could tell what sort of music a station like Kerrang would play because of its associations with the magazine, but are less sure what sort of output to be expected from a station such as Arrow. However, there are participants who had settled down to listen to a smaller number of stations after having tried all the stations when they first got their DAB set.

*"When I first got it I flicked loads and tried lots of different stations and then after a month or so I found what I liked and I settled down. There's some I sort of listened to and I probably won't listen to now. I've just settled into, I've found what I like and I stick with that."*

Manchester DAB Group

DAB users also reported listening **more actively** to stations, for example sport, the programmes on BBC 7, and some of the chat shows. DAB is also felt to give more opportunity for listeners to actively engage with the radio.

*"Whereas now the radio is taking far more of a role at home . . . the debates that are going on and the diversity of, you know, just different people's opinions and then you can sit and make your own judgement and say that's rubbish. You know what you just said is total rubbish and that's something I wouldn't have dreamed of getting into at all a couple of years ago."*

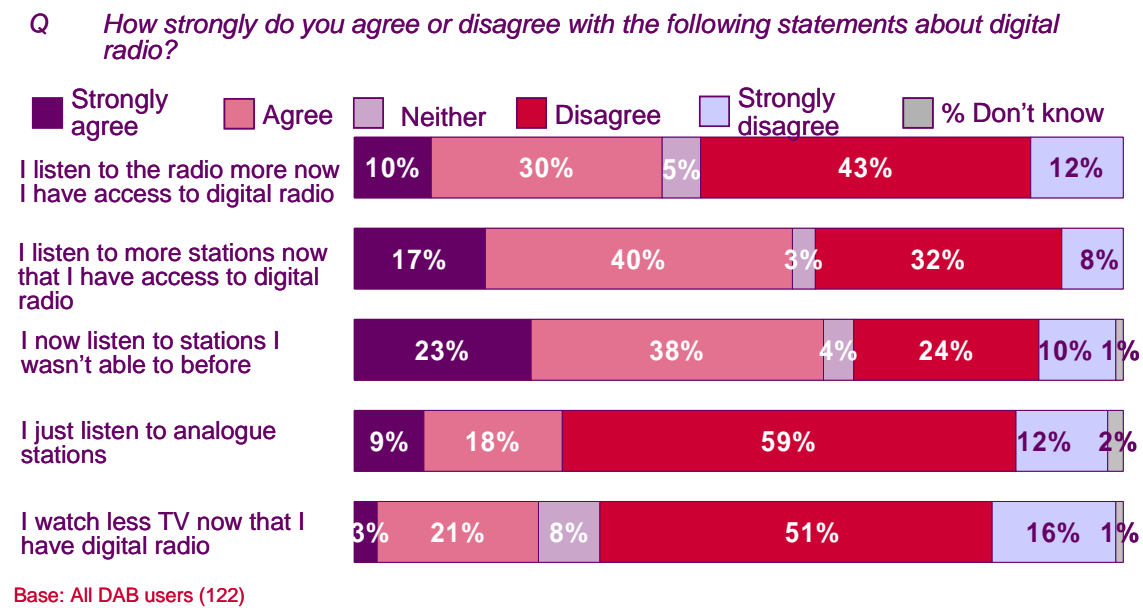
Manchester DAB Group

Respondents especially liked some of the digital only stations such as BBC 7 for its comedy and drama and BBC 6 and 1xtra for their music. However, they also listen to stations they previously had done so on analogue but enjoy the experience more.

Many DAB users have clearly changed their listening behaviour since accessing digital radio, with four in ten (40%) listening to the radio more after first accessing digital radio, with more than half (61%) listening to new stations and more stations (57%). Indeed, a quarter (24%) of DAB users believe that they watch less television now that they have digital radio.

Figure Twenty Seven

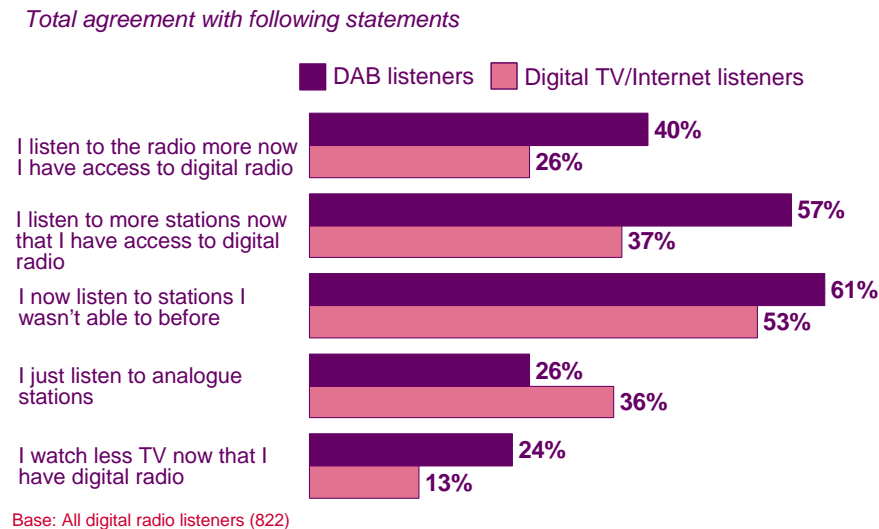
### Usage of Radio among DAB users



While users of digital radio through the internet and television have also changed their behaviour, fewer now listen to the radio more (27%) and just one in ten (13%) watch less television as a result of accessing digital radio.

Figure Twenty Eight

### Usage of Radio – DAB versus DTV/Internet listeners



## The future of DAB

There is a perception from both DAB and non DAB users that the **price of sets** has started to come down and will fall further in the future. Comparisons were made with other digital technology such as CD players, DVD players and digital cameras, which has followed this trend. Some of DAB owners also note how their sets have reduced in price since they bought them. It is felt that people now expected new technology to always fall in price and it is often a question of waiting for the right time to purchase.

*"I think now, you know, new technology's very high when it first comes out and then it starts to drop. Like DVD players, now you pick them up for £36 each, they were £700 when they first come out."*

London DAB Group

Ordinary analogue radio is regarded as quite cheap to buy and therefore it is difficult to see the benefits of spending around £100 on a set. Indeed some of the DAB set owners had debated whether to spend this amount of money on radio. It was also pointed out that radios lasted for a long time and did not need replacing very often.

*"It's sad really, but I didn't really, I didn't want to spend, you know it's a radio for Christ's sake, I didn't really want to spend hundreds on a radio . . . It seemed quite extravagant at the time to spend double what I would want to spend really, but it seemed, well, let's go digital, it seems a good idea, it looks nice."*

London DAB Group

*"I mean if it's not advertised and it's not actually out there, a lot of people, but especially like some older people, will probably think the saying, it's not broken, why fix it? So if you've got a standard radio you really like, it does the work, why go out and get a new one, if there's not really that much advertisement to show you how it's that much better."*

People considered that £50 might be an acceptable price for DAB sets, although others felt that the benefits of DAB would be worth somewhere between £10 and £20 more than the cost of an analogue set. However, most people in the workshops believed the price of DAB sets would become less of an issue once people learned of the features and channels available.

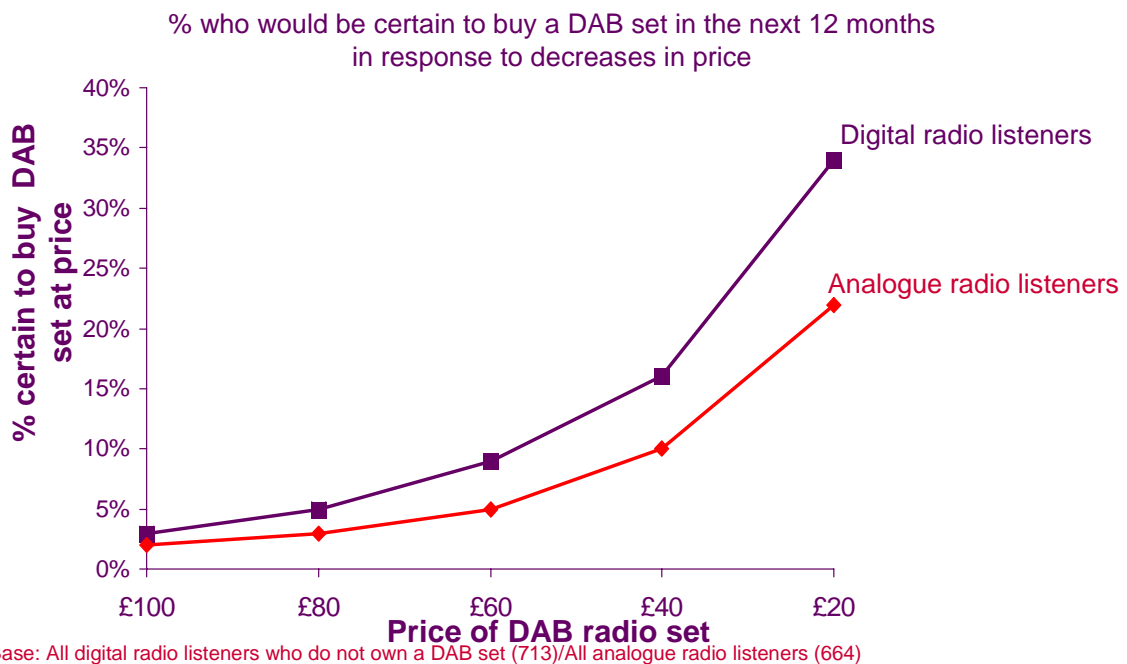
*"At the end of the day, if it comes down to the point where there isn't much difference between the price of that and an analogue system, the person thinking about buying a radio might think, oh, it's only £10 extra for a set's that digital, or £20 extra . . . But at the moment it's a select few that's got it."*

London DAB Group

Within the quantitative research, both digital radio owners who didn't own a DAB set and analogue listeners were asked their interest in purchasing a DAB digital radio at a number of different purchase points, at £20 intervals from £100 to £20. Among both groups, there is limited interest in purchasing a set until the price falls below £60 (see Figure Twenty Nine).

Figure Twenty Nine

### Change in purchase behaviour as price of DAB set falls



Among the workshops and focus group participants, it was also felt that DAB systems were not part of overall stereos and were mainly standalone items at present. Once they became a part of standard hi-fis or contained CD players, then take-up would increase. Radio was felt to be lagging behind other media in converting to digital such as telephones and television.

DAB users also point out that the benefits are not truly appreciated until the sets are used and believed that there needed to be more demonstrations in shops, with a marketing and communications push about the services offered and the improved sound quality.

#### Future technological changes

Future technological changes on DAB sets generally met with positive reactions from both DAB users and non-users:

- Users particularly liked the idea of music downloads and said they were happy to pay for this service, especially if they could press a button during the song being played on the radio to download it. This would save having to remember the name of the track;
- People also wanted the ability to receive a much wider choice of radio stations than are available at present;
- Interactive radio sets that let you send requests, vote on issues, and buy music at the push of a button would be welcomed. It was suggested that electoral voting could be expanded to include digital radio;

## Radio – Preparing for the future

- A DAB set incorporated into a mobile phone. This would be useful for people on the move as they travel to work by public transport. However, as with existing radios on mobile phones there is a perception that this was a gimmick;
- The idea of intelligent radio that learns the sort of programmes liked to listen to and records them for you was appreciated especially by those who already had a Sky Plus system for television programmes. However it was pointed out that people listen to various types of radio programmes depending on their mood. There were also respondents who found this concept a little 'creepy' and believed it went against the idea of live programming. It is also felt that it was already possible to record radio programmes on tape or onto computer if you were really interested in them;
- The idea of rewinding and being able to pause a radio programme is received extremely positively although there were a number of questions as to how this would work. However there were also respondents who felt this went against the idea of radio being a spontaneous medium as with 'intelligent' radio; and
- Radio sets with a small screen for programme information, video or web browsing on the move was also welcomed. There was also some concern that this would be dangerous if incorporated into a car radio.

It was also felt that such features prevent people from doing something else at the same time as listening which is one of the attractions of radio and that such features might ruin the design and aesthetic appeal of the radio. Furthermore, the main appeal of the DAB radio was felt to be the clear sound, ease of use and extra channels available rather than the extra features.

*"You buy a computer to go on the internet to browse or whatever, to find information out. You've got to be careful that you don't oversell it and it becomes too complicated. You listen to a radio, you don't do anything with a radio, it's there; you decide what you listen to. You don't want to interact with it; you don't want to do anything with it . . . just want to listen to it."*

Manchester DAB Group

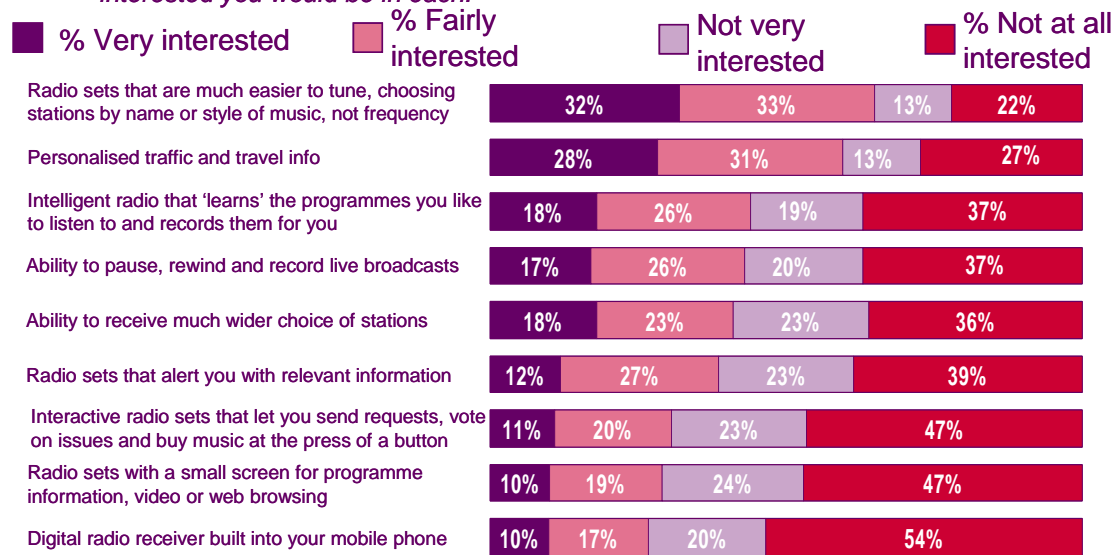
Another recent quantitative survey conducted by MORI on behalf of Ofcom (June 2004) explored interest in newly launched and potential services that could be made available through digital radio among the British adult population (see Figure Thirty). Among all adults, there was greatest interest in the ease of finding stations, already an advantage offered by digital radio, personalised traffic and travel information and radio which 'learnt' a listeners' favourite types of programmes and recorded them automatically. Interest in all of the new radio features was higher among those who listen to more than one hour of radio per day, on average.



Figure Thirty

## Interest in New Radio Features

Q Digital radio could soon include any of the following features. Please tell us how interested you would be in each.



Base: All respondents(1,010) MORI Telephone Omnibus (June 2004)

## **B7 Nations and regions – key differences**

### **Radio listening**

- Welsh listeners (92%) are more likely to listen to BBC radio stations than those in Scotland (82%) and Northern Ireland (78%). However, Scottish listeners (76%) are more likely than Welsh (65%) listeners to tune into commercial stations.
- Those living in Wales (54%) are more likely than those from the other nations to listen to BBC Radio 2, while Welsh and English listeners are more likely than those from either Scotland or Northern Ireland to listen to both Radio 3 and Radio 4.
- Welsh listeners are both more likely to listen to the radio at least five days per week (91% do so), than those from the other nations, and also more likely to tune into the radio for more than two hours on an average day that they listen (59% do so).
- Listeners from Northern Ireland (net importance +41%), Wales (+33%) and Scotland (+30%) are more likely to consider the provision of information on issues affecting the local community as an important reason to tune into a radio station than those from England (20%). More listeners from Northern Ireland (net importance +73%), Scotland (+65%) and Wales (+52%) also consider provision of local news as important and those from these three nations are more likely than English residents to believe local weather is also important.

### **Localness**

- Fewer English radio listeners are interested in issues about their county or region (net interested +59%) than those in Scotland (+75%), Wales and Northern Ireland) (+73%). By contrast, those from Northern Ireland (net interested +60%) are the least interested in news about their nation and the UK (+48%), although in the qualitative phase of this project, many in the Belfast workshops thought their local area to be the whole of the province.
- Local radio is a more often used source of information by those living in the Midlands (23%) than either the North (10%) or South (12%) of England for regional / county information. In the Midlands, local radio, along with regional TV, is the main source for this information, unlike the rest of the UK, where paid for local newspapers are more important than the radio.
- There is more widespread interest in finding out about local issues in Scotland, Wales and Northern Ireland, than in England, although some exceptions exist – for example there is less interest in local politics in Northern Ireland than in the other nations.

**Table Thirteen: Interest in issues about town or local area**

% net interested (Very interested / interested – Not interested / Not at all interested)

Base: All (1,501)	England	Scotland	Wales	Northern Ireland
	%	%	%	%
<i>Local news</i>	+81	+93	+94	+87
<i>Local traffic and travel</i>	+51	+55	+58	+41
<i>Local weather</i>	+58	+77	+64	+70
<i>Local events</i>	+52	+66	+51	+70
<i>Community issues</i>	+59	+57	+65	+43
<i>Local advertising</i>	-4	+16	+4	+8
<i>Local sport</i>	-20	+1	-4	-12
<i>Local politics</i>	+6	0	+11	-9
<i>Live music</i>	+22	+30	+34	+33
<i>Local celebrities</i>	-45	-39	-41	-25
<i>Local film listings</i>	+26	+24	+32	+34
<i>Local music / bands</i>	+9	+20	+25	+24
<i>Property</i>	+3	+15	+3	-2
<i>Live comedy</i>	-2	4	-11	-4

Source: MORI

## Local radio listening

- Reflecting their overall higher use of commercial stations, Scottish radio listeners are the most likely to listen to local commercial radio, 45% doing so at least five days a week. Northern Irish listeners are most likely (29%) to listen to local BBC stations. Scottish listeners are least likely to listen to BBC local stations, with just a third (35%) listening for more than an hour on an average day they listen.
- Those in the North of England (68%) are more likely than those living in the South (57%) or the Midlands (58%) and residents of Scotland (58%) and Wales (52%) to choose to listen to more than two local radio stations.
- Listeners in Northern Ireland (28%), Scotland (16%) and Wales (14%) are more likely than those in England (7%) to want a local radio station to cover a region wider than a county level. English residents (23%) are more likely than those from Northern Ireland (13%) to want a local station to cover just the local town or village.

## Radio – Preparing for the future

- English listeners are least likely (60% do so) to agree that they would “*be happy with a local radio station that plays a mix of programmes about local issues with programmes that are produced outside the local area*”. Northern Irish (78%) and Welsh (73%) are more likely to accept this.

•

### Digital radio

- Awareness of the term DAB digital radio is higher in England (58%) than in Scotland (43%) and Northern Ireland (33%). Knowledge of digital radio is also higher in England (37% know a lot / a little about the technology) than in Northern Ireland (24%).
- Among users of digital radio, those in the North of England are most likely to say ‘*I just listen to the analogue stations*’ (47%), while fewer do so in the South of England (35%) or the Midlands (29%).

## Annex 1: Segmentation analysis

Provided below is an overview of the segmentation analysis which was carried out on the data as part of the Ofcom Radio Review survey. Questions used for this analysis focused upon the issues of localness and local radio usage. The aim of the analysis was to see whether, and how, the population divided into like-minded 'clusters', sharing similar characteristics.

First a factor analysis was carried out which simplified all of the questions into six themes. These themes were:

1. Coverage of local radio
2. Local interest
3. Music and comedy
4. Local means local
5. Politics and national
6. Local identity

The second stage was to identify groups of respondents (clusters) using a technique known as cluster analysis. People within each of the six clusters we identified respond to questions in a similar way, and in ways that are different from those in other clusters. By relating these cluster to the factors found when grouping the questions, it is possible to apply a meaningful label to them, particularly when the demographic make-up of the clusters is explored. It should, of course, be pointed out that none of these groups are totally exclusive. The profiles point to general tendencies towards, or relative 'concentrations' of certain population sub-groups falling into these clusters.

Six clusters were identified:

### **Cluster One – The Community Cohorts** (18% of the population)

*Likely to be living on the outskirts of a town or city, this cluster is particularly interested in local issues. They are strong supporters of local radio, believing that local issues should be covered and that 'local' radio stations should be based in the area in which they broadcast. They are more likely than the other five clusters to listen to local radio, and they listen for longer in an average week. Those in this cluster are more likely than others to be aged between 35 – 54, to be of C2 social grade and have an average household income. They are more likely to be in a household with two-adults aged under sixty, or in two-parent families.*

### **Cluster Two – The News Junkies** (18% of the population)

*Likely to be from social grade AB, this male-dominated, high-income cluster is more likely to listen to the radio while travelling in a car, with BBC Radio 4 being their station of choice. They are more likely to listen to national radio, with commercial radio listening also featuring highly in their listening. News Junkies have little interest in local issues, with the exception of local politics, but have a citizenship view of local radio, as they believe that local issues should be covered by local radio.*

**Cluster Three – The Disengaged** (12% of the population)

*Likely to be young men from the DE social groups, members of this cluster are more likely to be living in large households and in an urban centre. This cluster is uninterested in local issues and has little local affiliation or identity. Their media consumption is dominated by tabloid newspapers and BBC Radio 1.*

**Cluster Four – The Well-informed** (19% of the population)

*Likely to be aged 55 and over, from the C1 social grade, this cluster, although interested to some extent in local issues, doesn't have a strong local identity, nor listens to local radio. They are more likely to listen to the national BBC stations, BBC Radio 2, 3 and 4 and less likely to listen to commercial stations. This cluster is also likely to read broadsheet newspapers.*

**Cluster Five – The Rural Community** (9% of the population)

*Living in a rural community, or small village, members of this cluster have a strong local identity and are interested in local issues and strongly believe they should be covered by local radio. Members of this cluster listen to BBC local stations, but also to talkSPORT and BBC Radio FIVE LIVE. They are likely to listen to the radio in a wide variety of situations, travelling to and from work, at home and work during the day and at home during the evening. Members of this cluster are likely to work full-time and live in households with two adults, aged under 60.*

**Cluster Six – The Entertainment Seekers** (24% of the population)

*The largest cluster, with a high proportion of women in the 25 – 34 age group, members of this cluster are most likely to be listening to the radio for entertainment. Although both interested in local issues, and believing that they should be covered on local radio, members of this cluster do not consider themselves to have a local identity. They are more likely to listen to BBC Radio 1, and both national commercial radio (particularly Virgin Radio, and local commercial stations. This cluster watches a lot of television, read mid-market, local and regional press and are likely to read magazines.*

## Annex 2: Statistical reliability

The sample tolerances that apply to the percentage results in this report are given in the table below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population, was interviewed. As indicated, sampling tolerances vary with the size of the sample and the size of the percentage results.

The confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 19 in 20 that the 'true' value will fall within a specified range. The table below illustrates the predicted ranges for different sample sizes and percentage results at the '95% confidence interval'.

### Approximate sampling tolerances applicable to percentages at or near these levels (at the 95% confidence level)

	10% or 90% ±	30% or 70% ±	50% ±
Size of sample or sub-group on which survey result is based			
1,501 interviews (total sample)	1.5	2.3	2.5
150 interviews (e.g. All Welsh listeners)	4.8	7.4	8.0
330 interviews (All AB social grade)	3.2	5.0	5.4

Source: MORI

Thus the confidence interval (or margin of error) is by how much the survey result could increase or decrease and still be considered to reflect the 'true' result that would have been recorded if everyone in the population had been surveyed. As an example, if a survey result of 50% is given to a question asked of the entire sample (1,501 interviews), the chances are that the 'true' result would be 50% +/- 2.5%.

When results are compared between separate groups within a sample, different results may be obtained. The difference may be 'real,' or it may occur by chance (because not everyone in the population has been interviewed). To test if the difference is a real one - i.e. if it is 'statistically significant', we again have to know the size of the samples, the percentage giving a certain answer and the degree of confidence chosen. If we assume '95% confidence interval', the differences between the results of two separate groups must be greater than the values given in the table below:

**Differences required for significance at the 95% confidence level  
at or near these percentages**

	<b>10% or 90% ±</b>	<b>30% or 70% ±</b>	<b>50% ±</b>
<b>Size of sample on which survey result is based</b>			
English residents (1,000) vs. Welsh residents (150)	5.2	7.9	8.6
Men (695) vs. Women (806)	3.0	4.7	5.1

*Source: MORI*



### Annex 3: Definition of social grades

The grades detailed below are the social class definitions as used by the Institute of Practitioners in Advertising, and are standard on all surveys carried out by MORI (Market & Opinion Research International Limited).

Social grades			
	Social class	Occupation of chief income earner	Percentage of population
A	Upper Middle Class	Higher managerial, administrative or professional	2.9
B	Middle Class	Intermediate managerial, administrative or professional	18.9
C1	Lower Middle Class	Supervisor or clerical and junior managerial, administrative or professional	27.0
C2	Skilled Working Class	Skilled manual workers	22.6
D	Working Class	Semi and unskilled manual workers	16.9
E	Those at the lowest levels of subsistence	State pensioners, etc, with no other earnings	11.7