Ofcom
OFFICE OF COMMUNICATIONS

Radio – Preparing for the Future

Appendix A: Results of audience research

Research Study conducted by The Knowledge Agency on behalf of Ofcom

October 2005

Contents

Section A1

Management summary

- Radio is seen as unique in many respects, most notably in being the most *accessible* medium. There is an overwhelming desire for mainstream UK radio to continue to offer a wide range of speech and music content.

- The most important components of radio are...

  – Music variety, local and national news and weather

  – Witty, entertaining and intelligent presenters

  – Ease of access wherever you are and whenever you want

- The overall level of satisfaction with current UK radio is high. Retaining the status quo would keep many people happy.

- In terms of satisfaction with current provision, the greatest shortfall appears to be in the quality of presenters, and the provision of services for specific communities, particularly children.

- When forced to prioritise what they would like to hear more of on radio, the majority opt for more local services, more music, more presenter-based programming and more opportunities for up-and-coming talent.

- Existing commercial radio is expected by most people to provide music, local news and information.

- The BBC is primarily expected to provide a variety of speech output, and to satisfy more specialist needs such as cultural and educational programming.

- Although the majority show little interest in increased plurality of provision, a minority of more educated, upmarket BBC listeners would welcome increased competition of the right quality.

- There is some interest in the concept of subscription-based radio services. Specialist, added value music and sports services would appear to have the greatest potential for success.

- Although respondents do not naturally think of radio as a public service, they clearly articulate what kind of radio they want for themselves *and for society as a whole*...

  – *A high quality, varied, easily accessible range of programmes and services that address the needs of national and local communities, with a particular emphasis on music and information*

Section A2

# Objectives & Methodology

Background

Ofcom recently completed the first phase of the Radio Review. As part of this phase, a comprehensive piece of research was undertaken by MORI, looking specifically at current trends, localness and digital radio. This research provides rich insight into how listeners use radio compared to other media, their likes and dislikes, and what they want from radio, and local radio in particular.

In the consultation document for Phase 1, Ofcom said that in Phase 2 of the Radio Review it would try to answer some of the questions raised about the longer-term, particularly as regards the public purposes of radio and how they are best delivered.

Research was required to help define and quantify a framework for the purposes and components of *public service* radio, and to understand the relative importance of different elements of radio output to listeners.

The research set out to create a clear, comprehensive and graphical template for the core purposes and characteristics of radio much in the same way as Ofcom did for television as part of its Public Service Television Broadcasting Review in 2004 (Figure 1).

Figure 1: Purposes and characteristics of public service television
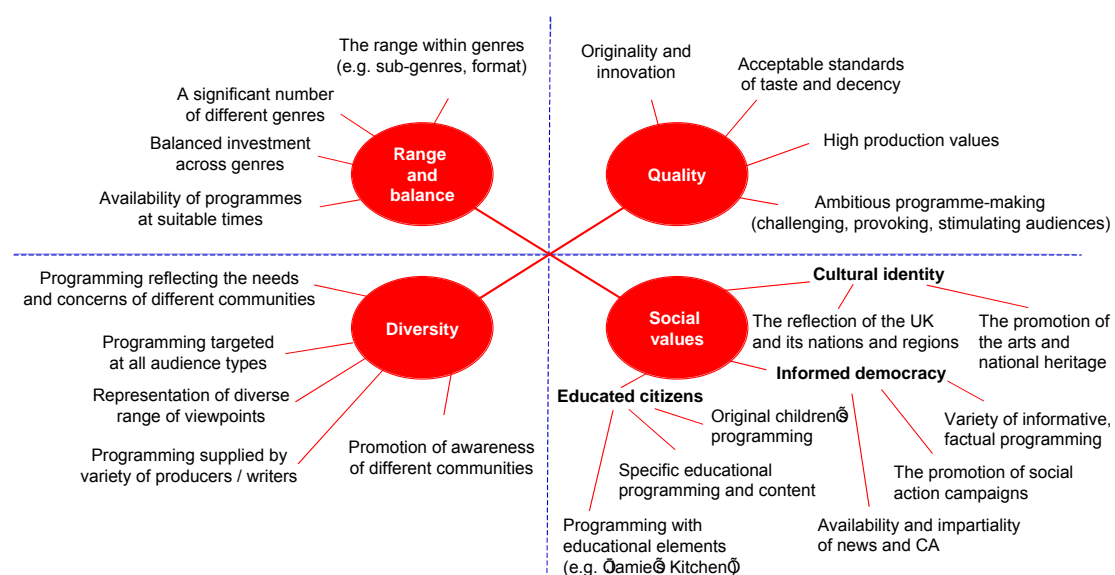
Objectives

The key topic areas and objectives of the research are set out below:

Importance of radio and its component elements

- How important is radio versus other media?

- What elements of radio are most important to radio listeners, and how important?
- What is important for radio to deliver versus other media?

Defining/structuring radio's core purposes

- Content elements (news, traffic, etc.)
- Conceptual elements (quality, diversity, balance, etc.)
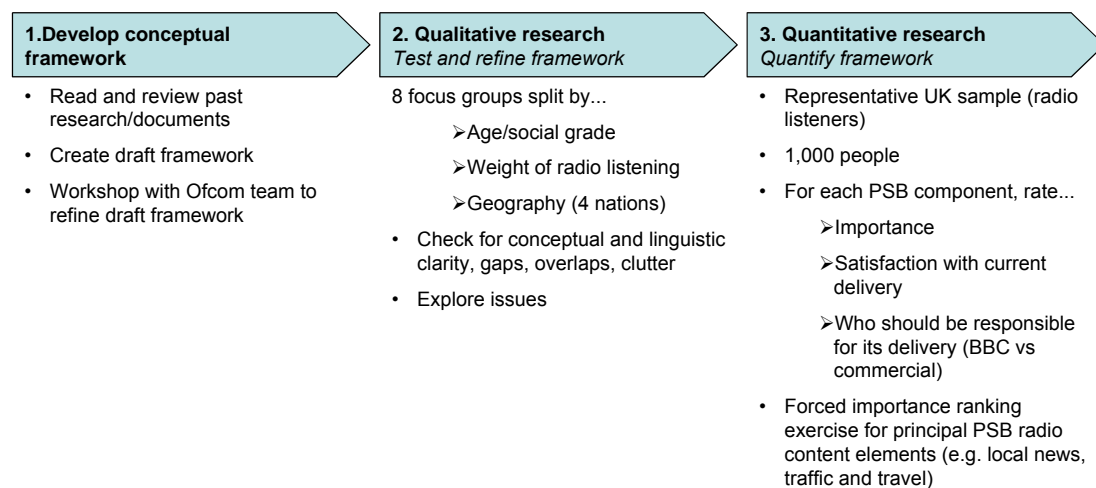
Understanding and quantifying radio's core purposes

- How important is each (relatively) from both *consumer* and *citizen* perspectives?
- What is the specific role of *radio* (vs other media) in delivering each of them?
- How well is each currently delivered?

Ofcom commissioned independent research agency, The Knowledge Agency, to conduct this study.

Methodology

The research consisted of three distinct stages – the development of a draft framework of purposes and characteristics for testing, followed by qualitative research among a cross section of audience types, and finally a large scale quantitative survey among a nationally representative cross-section of 1,000 radio listeners. Figure 2 gives an overview of the project process.

Figure 2: overview of project process

1. Develop conceptual framework	2. Qualitative research *Test and refine framework*	3. Quantitative research *Quantify framework*

• Read and review past research/documents
 	
• Create draft framework
 	
• Workshop with Ofcom team to refine draft framework
	8 focus groups split by...
	  ➤ Age/social grade
	  ➤ Weight of radio listening
	  ➤ Geography (4 nations)
	• Check for conceptual and linguistic clarity, gaps, overlaps, clutter
	• Explore issues
		• Representative UK sample (radio listeners)
		
		• 1,000 people
		
		• For each PSB component, rate...
		  ➤ Importance
		  ➤ Satisfaction with current delivery
		  ➤ Who should be responsible for its delivery (BBC vs commercial)
		• Forced importance ranking exercise for principal PSB radio content elements (e.g. local news, traffic and travel)

Develop conceptual framework

The first stage of the project was dedicated to developing a draft framework for the purposes and characteristics of radio to use as the basis for discussion guide and questionnaire design for subsequent stages of the project which would, in turn, help us test and refine the framework.

The draft framework was put together jointly by The Knowledge Agency and the Ofcom project team, informed by past radio research, the PSB Television framework, and with reference to the Communications Act 2003.

The initial draft framework was based around the same four core components as the PSB television framework, namely Range and Balance, Quality, Social Values and Diversity. However, it became clear after the qualitative research stage that this hierarchy did not adequately reflect listener attitudes to radio, and a revised version based on six core components (Variety, Quality, Community, Social Benefits, Access and Information) was ultimately adopted (see section 3, below).

Qualitative research

This research consisted of a series of eight 3-hour focus group discussions.

The research sample was structured to reflect the UK radio listening population as broadly as possible. With this is mind, 8 mixed sex workshops, split by age, social grade, weight of radio listening and location were held.

Table 1: Sample Structure

Group	Location	Age profile	Social grade	Radio listening
1	Aberdeen	50+	ABC1	Medium/light
2	Cardiff	16-20	ABC1	Heavy
3	Belfast	20-34	C2DE	Heavy
4	Weston-super-Mare	35-50	C2DE	Medium/light
5	Northampton	20-34	ABC1	Medium/light
6	London	35-50	ABC1	Heavy
7	Birmingham	50+	C2DE	Heavy
8	Liverpool	16-20	C2DE	Medium/light

The groups took place between 9th and 17th March 2005.

Participants in each group represented listeners to a mix of different radio stations – BBC and commercial, local and national. A minimum of three respondents in each group had access to digital radio services (either via DAB or digital television).

The aims of these groups were threefold:

- To explore the relevant issues in depth, and particularly to help define what the specific role for public service broadcasting is in radio;

- To expose the prototype framework to public scrutiny, to ensure that it made conceptual sense and to identify any gaps, overlaps or redundancies;

- To identify the right language for expressing simply the ideas in the framework, so that they could be meaningfully tested through quantitative research.

Quantitative research

The quantitative survey was conducted by Ace Fieldwork Ltd on behalf of The Knowledge Agency between 12th and 28th April, 2005.

A total of 1,037 face-to-face interviews were completed across the UK

Scotland, Wales and Northern Ireland were upweighted in the sample to allow for separate reporting by nation. The final data was then re-weighted to be representative of the UK population as a whole.

The key objective of this stage of the research was to substantiate the findings of the qualitative research with regards to the purposes and characteristics identified.

The questionnaire tested a number of key areas, through a combination of rating, ranking and polar-trade-off exercises.

- Radio usage
- Platforms for listening
- Stations most visited
- Importance, quality of delivery and who should be responsible for providing the different elements of the framework
- Ranking of different types of radio content in terms of value to the listener themselves and value to society as a whole
- Polar-trade-off attributes – forcing an either/or decision
- Attitudes to pay services
- How should the needs of minority ethnic and religious communities best be served?

Section A3

What do people want from radio?

Overview

Radio is important to people, but often taken for granted. Much of the language used by respondents in the focus groups described radio as a recessive, passive medium.

"Background listening..."

"Easier to ignore than TV..."

"It's just radio..." [Various]

However when pressed the majority of those interviewed (including light radio listeners) insist that it plays an important role in their lives, and during the process of discussions many felt reminded of the benefits of radio and its value to them.

"I really would miss it... can I take back what I said at the start" [Birmingham]

Respondents described radio as a unique medium: it goes anywhere; it is seen as the most local broadcast medium; it is seen as the best travel medium and the best for music; it breaks new music and comedy; and it feeds breaking news to you wherever you are.

For many, radio's primary role was the provision of music into their daily lives. However, some speech radio listeners spoke at length about radio's ability to explore and discuss subjects in a depth that they rarely saw on television, for example, and its ability to stimulate the imagination (through drama, for example) in a way that was more akin to books than to any other electronic medium. Listening to the radio was seen as something virtuous – it lets you carry on with other useful things, it engages the imagination and it broadens horizons.

"Radio is like a book... your mind has to create the pictures" [Aberdeen]

Moreover, respondents felt that radio acts as a complement both to other activities and to other media. Many participants talked about how radio is used for background listening when surfing the internet, as an extra soundtrack to support television coverage of major sports events and concerts, and for keeping up to date with the news when television isn't available. Many felt that radio offers depth of coverage that in their opinion may not always be available on television (e.g. of local sport), even if television is the medium of choice for the major national sporting events for many.

"It makes life interesting when you're doing something" [Aberdeen]

In both the qualitative and quantitative research stages, we asked participants to prioritise which aspects of radio were most important to them, and to discuss these aspects in detail.

One of the key outputs for the project was to be a simple graphical framework for the purposes and characteristics of radio. As a means of structuring the discussion in the focus groups with this end in sight (and to help stimulate this discussion in the groups) stage one of the project was dedicated to preparing a draft framework, using the PSB television framework as our point of departure. Figure 3 shows this initial draft, before input from the focus groups.

Figure 3: Draft framework for the purposes and characteristics of radio
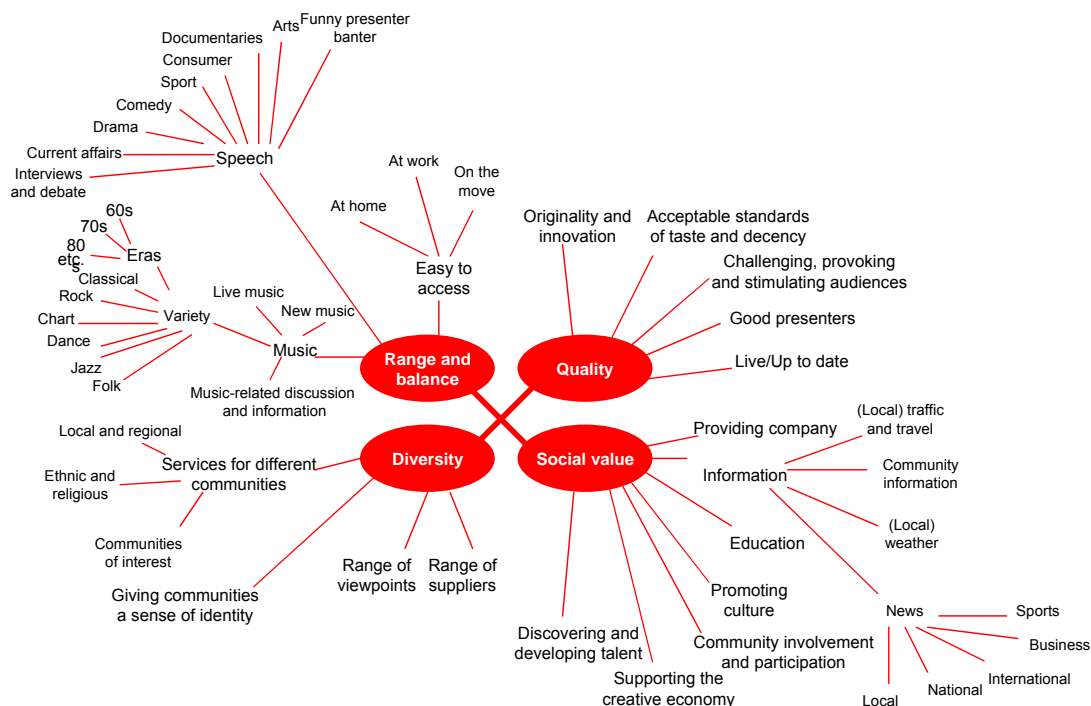
Participants in the focus groups were asked first for their spontaneous views on what was important about radio, then asked to identify priorities, gaps and redundancies in the draft framework. Lastly each of the specific elements in the draft framework was discussed in detail.

It became clear through the group discussions that, although most of the important purposes and characteristics of radio were present in the draft framework, the hierarchy implicit in the four main headings did not really reflect either the way respondents spontaneously described the purposes and characteristics of radio, or those elements from the framework they chose to prioritise either for themselves or for society as a whole when prompted. Specifically...

- *Music*, *news* and *information* were considered the most important content characteristics of radio (particularly in listeners' *personal* priorities), and none of these were represented at the top level in the draft framework. It was decided to give these all greater prominence in the final version.

- The role of radio in informing, supporting and involving different *communities* was considered extremely important by focus group participants when thinking about

radio's role for society as a whole. Attributes relating to community which appeared in different parts of the draft framework were grouped together and given greater priority in the final version.

- It became clear from the group discussions that *access* is a key characteristic of radio. The ability to access radio in places other media are not available is one of its defining and enduring strengths, and has far-reaching implications for the range of services people want from radio (discussed in more detail later in this section). People's ability to access radio programmes when and where they want was felt to be of fundamental importance both to listeners personally and to society as a whole, and we consequently chose to give this greater priority in the final framework.

- The role of good presenters in shaping perceptions of quality was also considered fundamental. Although this was present in general terms in the initial draft, specific characteristics of good presenters (*witty and entertaining*, *intelligent and independent*) were added to the final version, based on the insights from listeners in the focus groups.

- Participants in the focus groups spoke repeatedly and at length about radio's role in providing company both as a *social* benefit to the elderly and visually impaired (for example), and a *personal* benefit to themselves, particularly when travelling, working during the night or doing housework. This has been incorporated into the final version.

From this process we have ultimately identified six key "purposes and characteristics" for radio.

- Radio services that are easy to **access** wherever and whenever listeners want to hear them;

- Radio programmes and services of a high **quality;**

- Timely provision of relevant **information**, including local and national news, weather and traffic and travel;

- A wide **variety** of music and speech programming;

- Radio that provides a sense of **community**, and serves and supports the different communities that make up the UK;

- Radio that delivers **social benefits**, including cultural and economic benefits.

Within each of these general areas there are specific examples of what people want radio to deliver. These are summarised in Figure 4, below, the final framework for the purposes and characteristics of radio as validated and quantified by the two-stage research approach.

Figure 4: Purposes and characteristics of radio
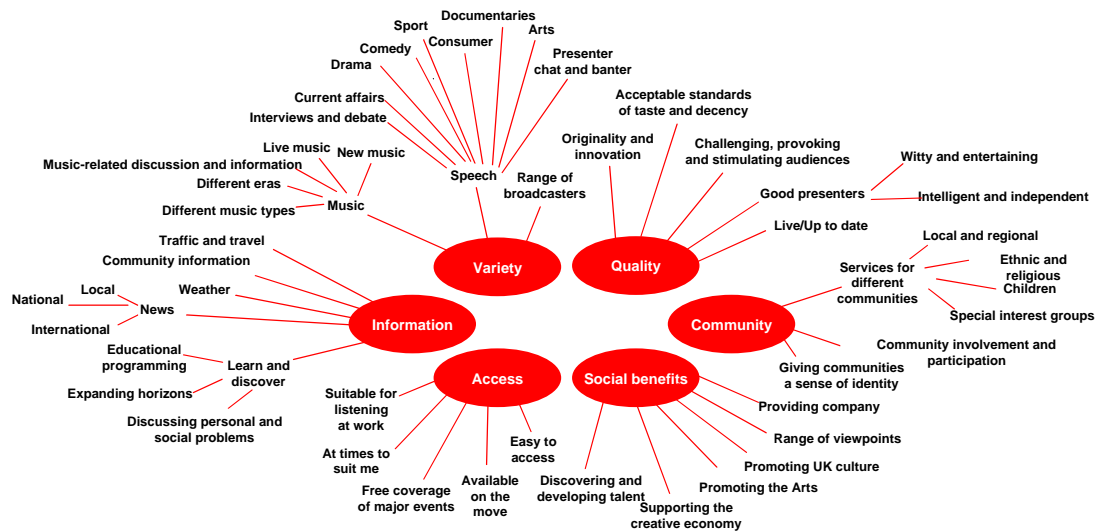
For the purposes of the quantitative research survey, the elements of the framework were represented by a series of statements that were designed to communicate the attributes to the general public as clearly and succinctly as possible. Table 2 shows how each attribute was presented to the survey participants.

Table 2: Linking purposes and characteristics to research statements

Purpose and characteristic	Research statement
Access	
Available on the move	Stations and services that are easy to receive on the move (in cars, on portable devices, etc.)
At times to suit me	Programmes and services that can be heard whenever I choose to listen to them
Free coverage of major events	Coverage of major sports and other events available free of charge
Quality	
Witty and entertaining	Witty and entertaining presenters with a good sense of humour
Live/up to date	Provision of up to the minute news and information
Intelligent and independent	Intelligent presenters who know their own mind
Challenging, provoking and stimulating audiences	Stimulating, challenging programmes that make you think
Originality and innovation	Lots of new and innovative programme ideas
Information	
Local news	Local news bulletins and reports to keep people well informed
Weather	Local and national weather reports
National news	National news bulletins and reports to keep people well informed
Traffic and travel	Traffic and travel information
Community information	Information about the local community (events, schools, etc.)
Learn and discover	Programmes that people will feel they have learned something from
Educational programming	Specialist educational programmes for children and adults
Variety	
Different music types	A variety of different styles of music (pop, classical, dance etc)
Different eras	Music from a variety of different eras (60s, 80s etc)
Music related discussion and information	Interesting information and chat around the music
Live music	Live music
New music	New music
Speech	A variety of speech programmes (drama, comedy, current affairs, sport etc) A variety of speech stations (drama, comedy, current affairs, sport etc)
Range of broadcasters	Radio services provided by a range of different broadcasters

Community	
Local and regional	*Stations that reflect the needs and concerns of local and regional communities within the UK*
Children	*Programmes and services for children*
Special interest groups	*Stations that reflect the needs and concerns of special interest groups within the UK (e.g. rock music fans, football fans, gay people)*
Community involvement and participation	*Opportunities for ordinary people to get involved in radio stations and programmes*
Ethnic and religious	*Stations that reflect the needs and concerns of ethnic communities within the UK*
Social benefits	
Providing company	*Programmes and presenters that keep you company when you're on your own*
Discovering and developing talent	*Discovering and developing new talent (e.g. presenters, new bands)*
Promoting the Arts	*Programmes that promote cultural activities like music and the Arts*
Range of viewpoints	*Representation of a wide range of different political and social viewpoints*

Relative importance of the purposes and characteristics of radio

Participants in the quantitative research were asked to rate the importance of each of the specific purposes and characteristics of radio on a five-point scale. Looking at the percentage of people rating each element as very or quite important, Figure 5 illustrates the top ten most important attributes of radio across the UK population.

Figure 5: Ten most important attributes for radio in the UK

Q: How important do you think it is for radio in the UK as a whole to provide the following…

Attribute	Very important	Quite important	Neither	Not very	Others
Stations and services that are easy to receive on the move	64	25	5	4	3
Witty and entertaining presenters	51	38	6		2
Local news bulletins and reports to keep people well informed	49	39	5	4	2
Local & national weather reports	47	41	5	5	2
National news bulletins and reports to keep people well informed	50	35	9		3
Provision of up-to-the-minute news and information	46	38	9	4	2
Intelligent presenters who know their own mind	43	39	12		3
A variety of different styles of music (pop, classical, dance, etc.)	41	40	12	4	3
Music from a variety of different eras (60s, 80s, etc,)	43	38	12	5	3
Programmes that can be heard whenever I choose to listen to them	48	31	10	7	3

□ Very important
□ Quite important
□ Neither important nor unimportant
■ Not very important
□ Not at all important
■ Don't know

%

The most important attributes of radio to the population may be summarised as:

• Music variety, local and national news and weather;
• Witty, entertaining and intelligent presenters;
• Ease of access wherever and whenever you want.

These results were fairly consistent across the nations and across age groups. Findings from the qualitative research were also consistent with these results.

The leading attributes in terms of importance come from all areas of the framework (Figure 6). There is no one aspect of radio that dominates the others, although there are directional differences.

Figure 6: There are important attributes in all parts of the framework

Weighted Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Conversely, the least important components were felt to be the promotion of cultural activities, educational programmes for children and adults, and stations that satisfy the needs and concerns of ethnic minorities (Figure 7).

Figure 7: Ten least important attributes for radio in the UK

Q: How important do you think it is for radio in the UK as a whole to provide the following…

%

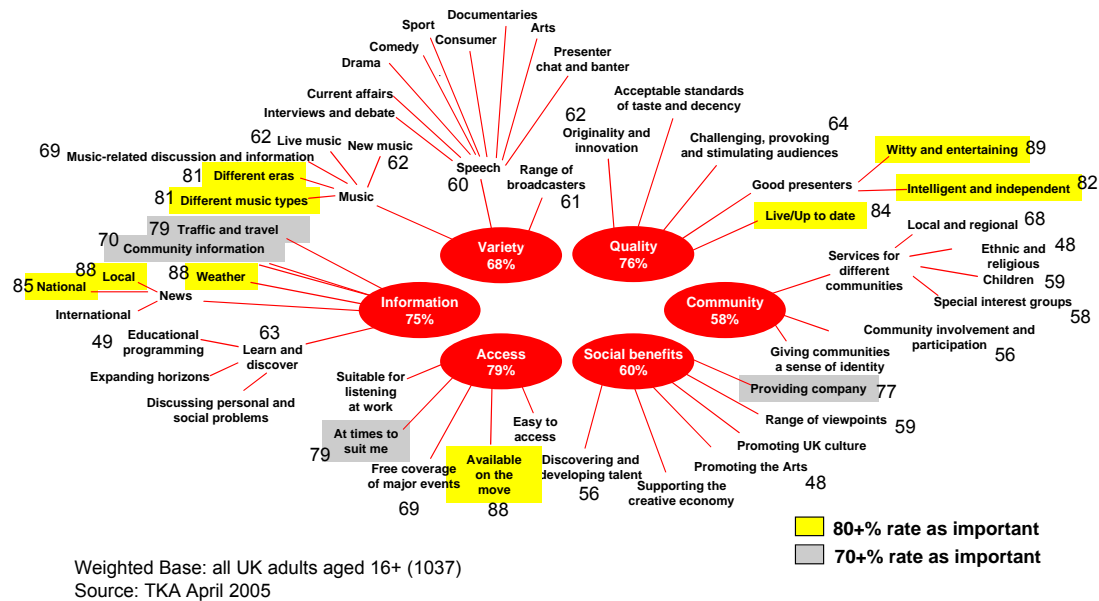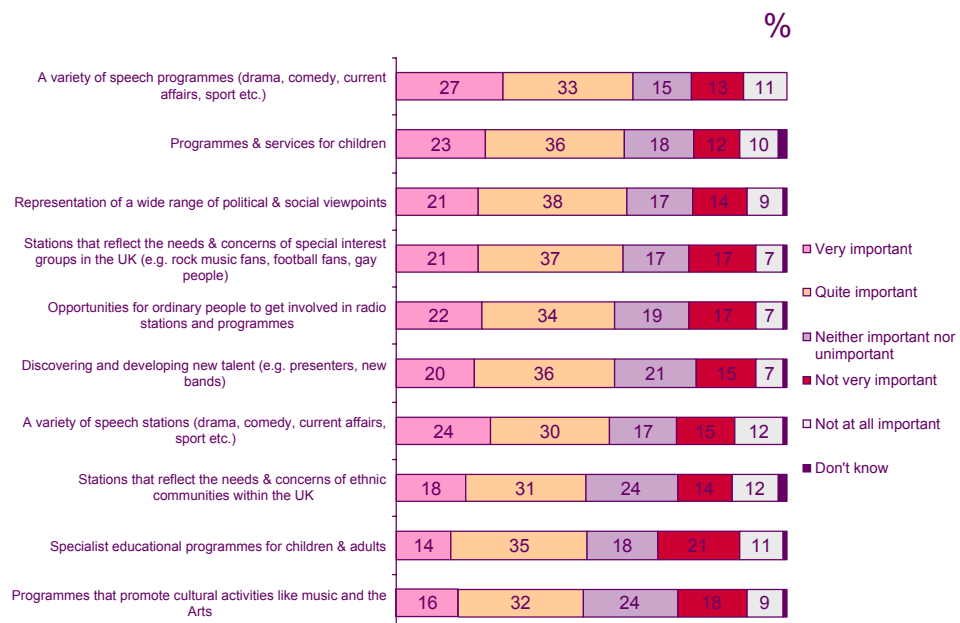
Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

However, it should be noted that these were seen as *relatively* unimportant. Even the lowest ranking component (*Programmes that promote cultural activities like music and the Arts*) was still considered important by 48% of survey respondents – with 24% remaining neutral on this statement.

Although, in terms of the most important individual attributes all parts of the framework were represented, there are some differences in the overall relative importance of each of the six main components – derived from taking a mean importance rating for all the attributes in each area (Figure 8). Access and quality are the most important components overall. Community and social benefits are less important.

Figure 8: Relative importance of the six main components

Q: How important do you think it is for radio in the UK as a whole to provide the following…

Component	Mean score (% rating as important)
Access	79%
Quality	76%
Information	75%
Variety	68%
Social benefits	60%
Community	58%

Legend: ■ Mean score for all statements in category (% rating as important)
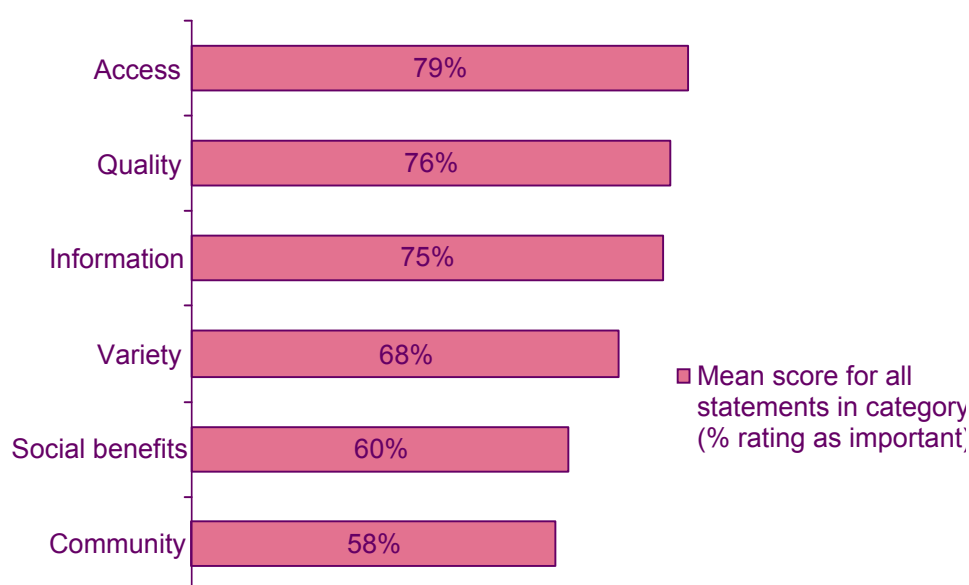
Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

The different attributes within each of the six main components were investigated in more detail in both the focus groups and the quantitative survey.

17

Access

Figure 9: Importance of access

Q: How important do you think it is for radio in the UK as a whole to provide the followingÉ

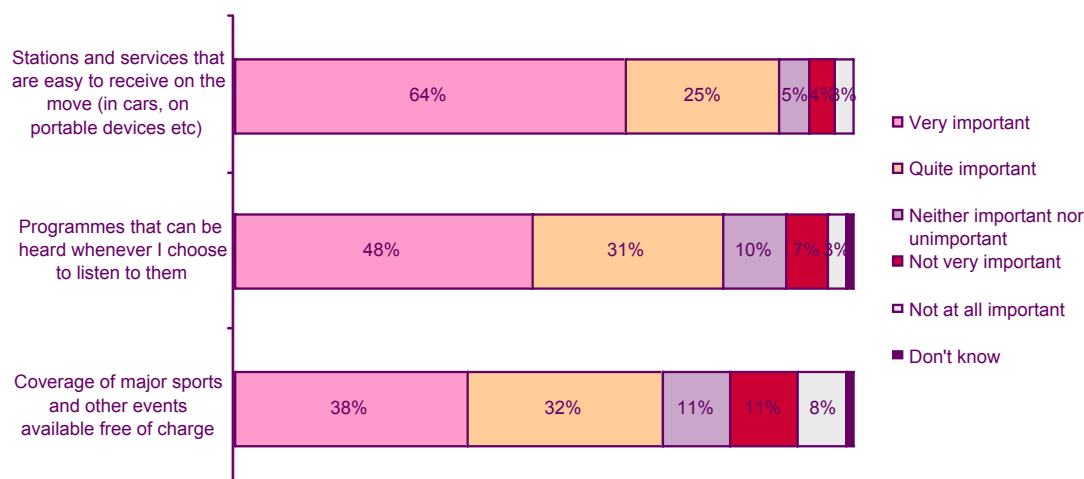|		
Stations and services that are easy to receive on the move (in cars, on portable devices etc)	64% — 25% — 5% 4% 3%	
Programmes that can be heard whenever I choose to listen to them	48% — 31% — 10% 7% 3%	
Coverage of major sports and other events available free of charge	38% — 32% — 11% 11% 8%	

Legend:
- Very important
- Quite important
- Neither important nor unimportant
- Not very important
- Not at all important
- Don't know

The quantitative research showed that, of all the purposes and characteristics of radio, access is most highly rated for importance. (In this instance access refers to the accessibility of stations and programmes rather than listener 'on-air' access such as phone-ins, etc.)

88% of respondents felt that services that are *easy to receive on the move* are important, 79% wanted programmes available *whenever I choose to listen*, and 69% felt it was important for radio to offer *coverage of major sports and other events available free of charge*.

As we have already seen above, the accessibility of radio in terms of location is a key enduring part of its appeal. However, this research suggests that access by time is also a key issue. In the focus groups, there was strong appeal among users for services such as BBC's listen on demand service.

Access is not just a function of *availability* – it is also a function of *awareness*. Focus group participants talked about how they don't necessarily find things that are relevant to them, even though they suspect that such programming does exist. This was seen to be partly down to the habitual nature of radio listening and partly down to the lack of availability of radio listings, particularly for digital radio.

"You don't know what's out there" [Belfast]

"[We're] missing out on all the good stuff... we know it's out there" [Birmingham]

Listening on the move was particularly important to 25-34 year olds (94%) – arguably those with the most mobile lifestyle - and to those listening to radio via the internet (92%).

This conclusion is supported by the qualitative research, where participants of all ages agreed that what makes radio unique as a medium is its ability to go anywhere – in the car, on the bus, in the garden, at work, etc. This is partly about radio's portability, but also about its unique ability to serve as a complement to other activities.

"It goes to work with you" [Belfast]

Because radio acts as a fundamentally different medium, most focus group participants insisted that it should continue to offer a full range of different services. They felt that just because (for example) television offers a more dynamic and vivid portrayal of world news, this does not mean that radio should focus on other things. There was recognition that radio needs to offer a full range of services because people rely on it to do so when they don't have access to television or internet.

"The whole is more than the sum of the parts" [Aberdeen]

Quality

Figure 10: Importance of quality

Q: How important do you think it is for radio in the UK as a whole to provide the followingÉ

	Very important	Quite important	Neither important nor unimportant	Not very important	Not at all important	Don't know
Witty and entertaining presenters with a good sense of humour	51%	38%	6%	3%	2%	
Provision of up to the minute news and information	46%	38%	9%	4%	2%	
Intelligent presenters who know their own mind	43%	39%	12%	3%	3%	
Stimulating, challenging programmes that make you think	30%	34%	14%	15%	7%	
Lots of new and innovative programme ideas	24%	38%	21%	11%	5%	
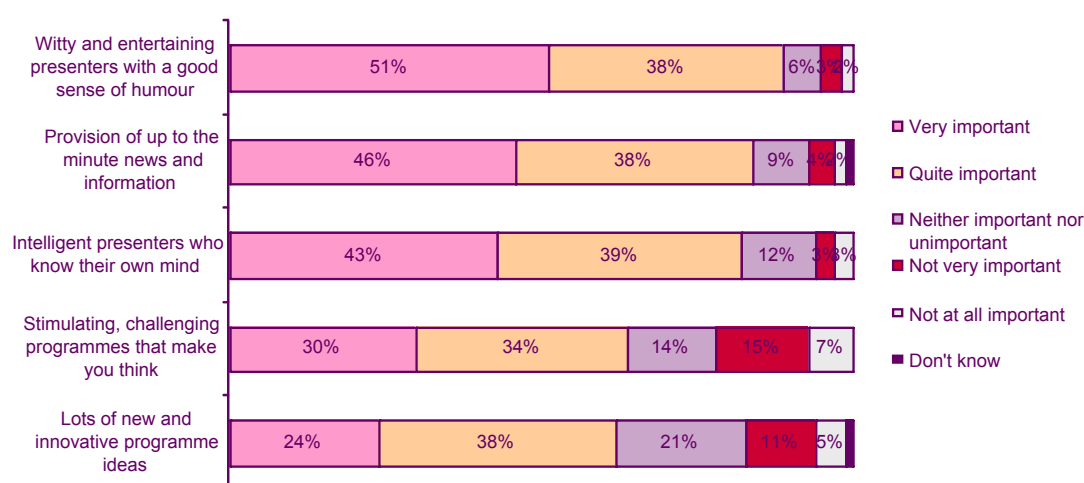
Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

Overall, quality was rated as being of high importance for UK radio; however, the ratings for the individual elements that comprise quality radio were quite diverse. The principal requirement was for *high quality presenters*. 89% of respondents felt it was important to have *witty and entertaining presenters*, and 82% *wanted intelligent, independent presenters who know their own mind* (91% of internet radio listeners).

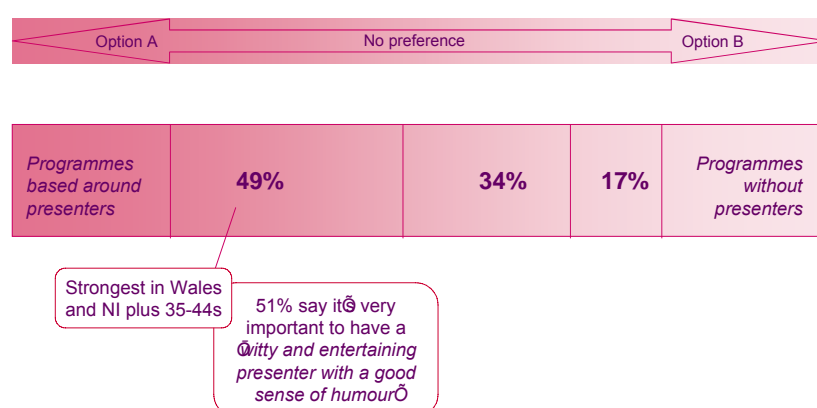Participants in the focus groups talked extensively about presenter quality being at the heart of what makes good radio. Although the definition of a good presenter is highly subjective, some specific characteristics did emerge across the groups including a good sense of humour, genuine interest and involvement in the local area and/or the music being played, and some degree of editorial independence (e.g. chooses his/her own records).

"Some presenters make friends of their listeners" [Birmingham]

"No fakes" [Northampton]

The importance of presenters was further reinforced by responses to a trade-off question offering people the chance to choose between programmes based around presenters and programmes without presenters (Figure 11). Although respondents in groups talked about preferring more music and less chat, it seems that intervention of the right kind from the right kind of presenter continues to be an important facet of radio's appeal.

Figure 11: Majority are in favour of presenter-based programming

Option A	No preference	Option B

| Programmes based around presenters | 49% | 34% | 17% | Programmes without presenters |

Strongest in Wales and NI plus 35-44s

51% say it's very important to have a *"witty and entertaining presenter with a good sense of humour"*

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Up to the minute news and information was also rated as highly important (84%) – discussions around this subject suggested that the immediacy of radio is an enduring strength. In the focus groups it was clear that radio's "freshness" – most commonly associated with being broadcast live – continues to be part of its appeal. People expect radio to bring them the latest breaking information, and topical discussion.

Respondents in the focus groups talked about how television had excelled in this area, particularly admiring sports and news coverage on the Sky channels (Sky Sports & Sky News). However radio's use as a background and listeners' ability to mentally tune in and out means that it is widely used to keep a "finger on the pulse". Immediacy during the working day and in work situations is a core strength.

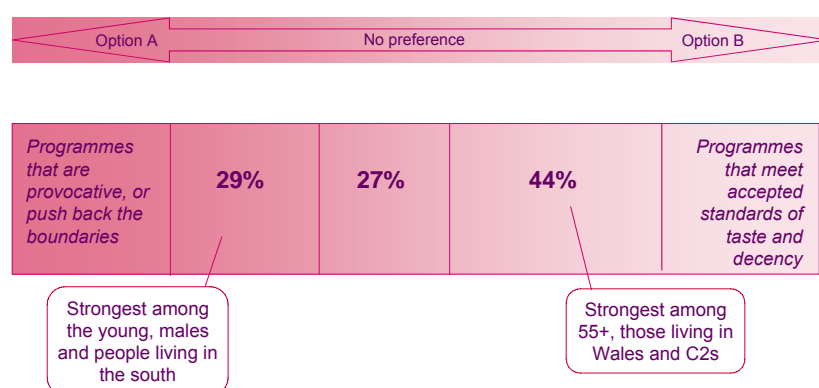Among other characteristics of quality, *new and innovative programme ideas* (62%) and *stimulating, challenging programmes* (64%) were of relatively lower importance – although still seen as important by the majority of respondents. It was felt by many in the groups that these qualities would be delivered naturally by high quality presenters, and were not therefore necessarily a goal in their own right. Moreover

most acknowledge that television, as a visual medium is more stimulating, although there are some exceptions. For a minority, radio engages the imagination (like book reading), and some devotees felt that the radio versions of popular formats (e.g. food programmes) worked harder to engage their listeners than the television equivalents.

There also appeared to be less appetite for programmes that are *provocative, or push back the boundaries*, on radio. Respondents in groups talked about not wanting to be in a position where they have to exercise discretion in their listening choices as they do with their viewing choices. They didn't *expect* radio to challenge their tastes in the same way as some suggested broadcasters such as Channel 4 are seen to do on television.

And it appears survey respondents don't want radio to do this, either. When presented with a direct trade-off between the two, the largest number of quantitative research participants opted for programmes that meet accepted standard of tastes and decency over programmes that are provocative or push back the boundaries (Figure 12).

Figure 12: Pushing back the boundaries not as important as meeting standards of taste and decency

Option A	No preference	Option B

Programmes that are provocative, or push back the boundaries	**29%**	**27%**	**44%**	*Programmes that meet accepted standards of taste and decency*

Strongest among the young, males and people living in the south

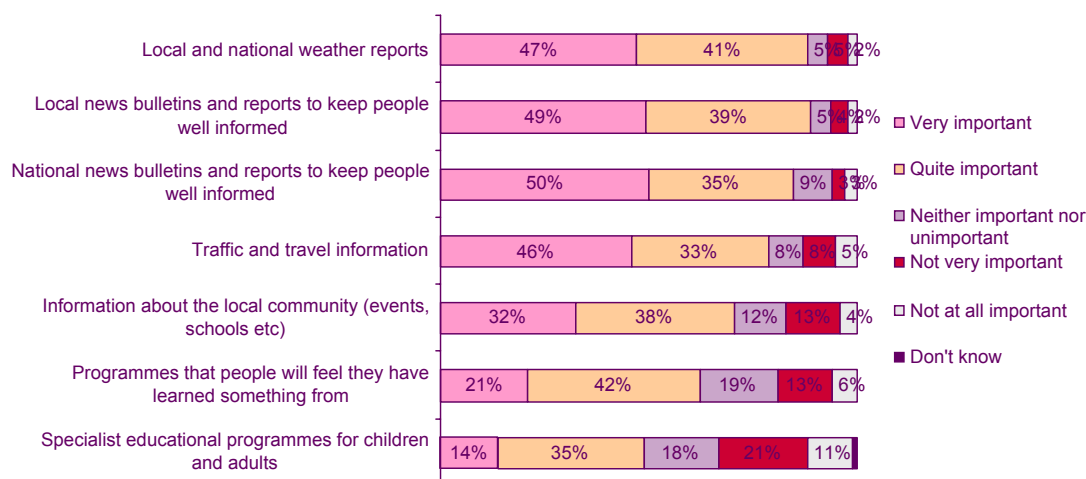Strongest among 55+, those living in Wales and C2s

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Information

Figure 13: Importance of information

Q: How important do you think it is for radio in the UK as a whole to provide the followingÉ

	Very important	Quite important	Neither important nor unimportant	Not very important	Not at all important	Don't know
Local and national weather reports	47%	41%	5%	5%	2%	
Local news bulletins and reports to keep people well informed	49%	39%	5%	4%	2%	
National news bulletins and reports to keep people well informed	50%	35%	9%	3%	3%	
Traffic and travel information	46%	33%	8%	8%	5%	
Information about the local community (events, schools etc)	32%	38%	12%	13%	4%	
Programmes that people will feel they have learned something from	21%	42%	19%	13%	6%	
Specialist educational programmes for children and adults	14%	35%	18%	21%	11%	

Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

There appear to be certain fundamentals which all groups consider to be vital components of a good radio system. *Local news* (88%), *weather* (88%) and *national news* (85%) are seen as the most important information elements, with a strong demand also for *traffic and travel news* (79%), and *community information* (70%).

Participants in the focus groups routinely acknowledged their reliance on radio information's trustworthiness and usefulness.

"It's where I get a lot of what I know about what's happening that day" [Liverpool]

 "BBC World Service... it's absolutely objective" [Aberdeen]

Older listeners are particularly interested in radio's information services – 92% think that local news is important, and 91% national news.

In the focus groups, providing information was felt to be the primary *social* purpose of radio. Although radio was seen as having a role to play in providing all kinds of information, it was felt to have a unique role to play in providing time-sensitive localised information – like traffic and travel, weather and some community information (floods, power cuts, school fetes, etc.).

"[Local information]... you couldn't get it any other way" [Birmingham]

"People ring up... they've lost their dog... they invariably find it..." [Birmingham]

More specialist on-demand local information (e.g. cinema listings) were felt to be better delivered through other media.

Of relatively lesser importance are the more educational elements of radio – 63% of survey respondents felt that programmes people will feel they have learned something from this important.49% feel that specific *educational programming* is important, and in the broader sense of programmes that *expand your horizons* 63% of respondents considered this important.

Variety

Respondents expected radio to provide a wide range of programme types. Participants in the focus groups were clear that they are not interested in everything, but they want their own personal favourites to be available. In particular, digital radio users actively welcomed the added range provided by digital, with stations like 1Xtra adding real value for some listeners.

"Like Sky... a channel for everyone" [Belfast]

Nevertheless, most people recognise that the bulk of listening and supply is to mainstream music formats – and they are broadly supportive of the current balance.

The quantitative research probed on a number of specific areas (Figure 14).

Figure 14: Importance of variety

Q: How important do you think it is for radio in the UK as a whole to provide the followingÉ
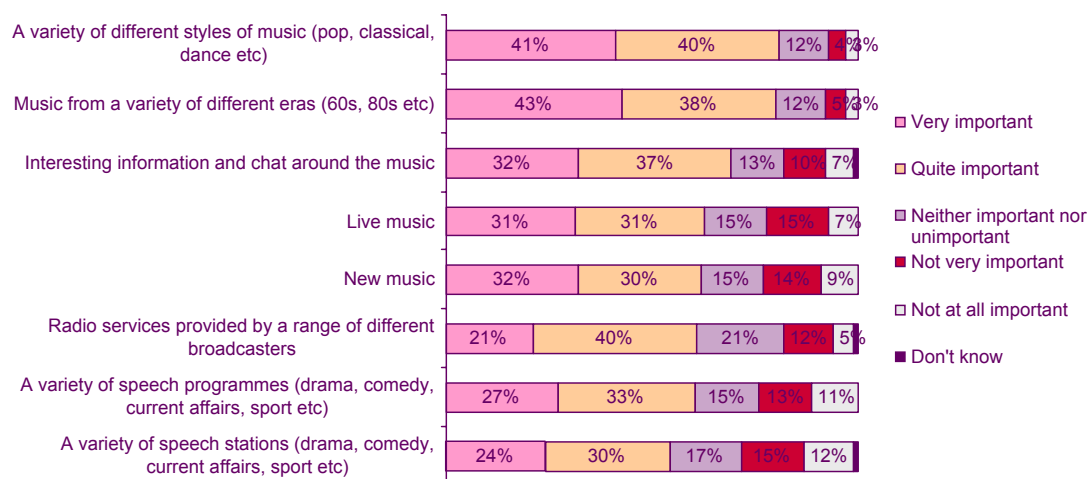
Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

Although there is appetite for a varied diet of both music and speech programming, it is clear that music is the key driver of most people's radio requirements. 81% of survey respondents highlighted the importance of the provision of a mix of music both by type and by era. 62% think that new music is important, and the same figure consider live music to be an important part of radio's output.

Similarly, most of the focus group sample listen to radio predominantly for music, and most were listening to mainstream music stations most of the time.

"Music... that's the reason I switch the radio on" [Liverpool]

"It's what radio was invented for..." [Weston]

Nevertheless, they felt that it was important that a variety of music be available both by era and style, and radio's role in introducing people to new music continues to be hugely important, especially for younger people, in spite of the availability of more hi-tech alternatives.

"You get to hear what's new... it can lift your spirits" [Aberdeen]

"Radio lends itself to music... you don't need to see the artist" [Aberdeen]

Much of the specific feedback to speech content was covered under *Information* above. However information and chat around music was picked out as important by over two thirds of respondents (69%). 60% of those interviewed felt that a range of speech *programmes* was important, significantly more than the 54% who felt that a range of dedicated speech *stations* was important. Both these attributes rated in the bottom ten overall, yet were nevertheless chosen as important by over half the sample.

Respondents in the focus groups felt strongly that a range of speech content should continue to be available, although its role in provision of news and current affairs was considered as more important overall than, for example, drama and documentaries.

Indeed, documentaries were the one area where the focus group respondents consistently felt that radio could be considered a poor relation to television as it was viewed primarily as a visual genre. Many struggled to think of an example of a radio documentary. To a lesser degree, the same attitudes and lack of awareness were expressed towards drama.

Attitudes towards sport, as one would expect, were polarised. Most respondents felt the television coverage was superior, but radio was seen to offer a distinctive angle on sports coverage, with greater breadth of coverage, freedom of access (e.g. football for those without Sky), and more local coverage.

There was some concern from older respondents that younger listeners are not engaging in speech radio. This was confirmed by the younger respondents themselves in their attitudes to specific speech genres.

"Very BBC... those horrible talking ones where they just talk for hours and hours... I'd rather just talk to someone" [Liverpool]

"I know there used to be radio dramas, but that was before TV" [Liverpool]

As a result, some groups did perceive a gap in the market for what was described as a less "fuddy-duddy" speech alternative to Radio 4. Parallels were drawn with Channel 4 on television – the channel of choice for most of the younger respondents.

In the quantitative survey, the overall preference for music over speech was reinforced in a trade-off question where, given a choice between more music programming and more speech programming, a clear majority (55%) opted for more

music. The desire for more music was strongest among 16-24s (77% choosing this option). Although the majority of over 55 year old respondents also opted for 'more music' options, there was a clear bias towards this age group amongst those choosing 'more speech' (Figure 15).

Figure 15: Music is the dominant force in programming and station choice

Option A	No preference	Option B

More speech programming	17%	28%	55%		More music programming
		55+ year olds (27%) and (27%)	Strongest with 16-24 year olds (77%) and (76%)		
More speech stations	18%	30%	52%		More music stations
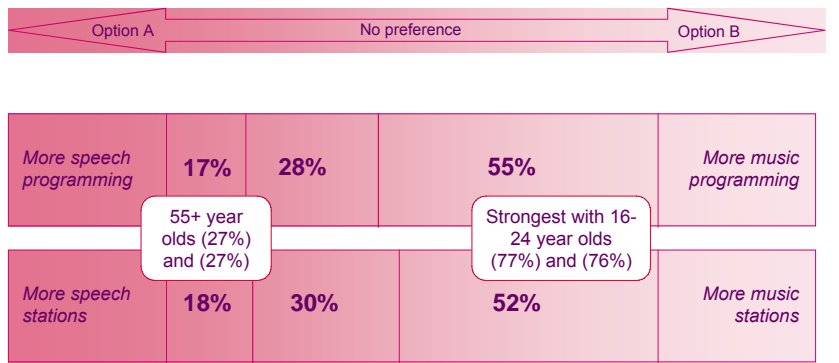
Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

When asked what kind of music they would like to hear more of, views differed dramatically by age group. Although there was a marginal preference overall for more familiar favourites over more new music, 60% of 16-24s would choose more new music. Over 70% of over 55s opted for more familiar favourites (Figure 16).

Figure 16: Choice of music styles polarised by age

Option A	No preference	Option B

More new music	29%	27%	44%	More familiar favourites

60% of 16-24s	71% of 55+s
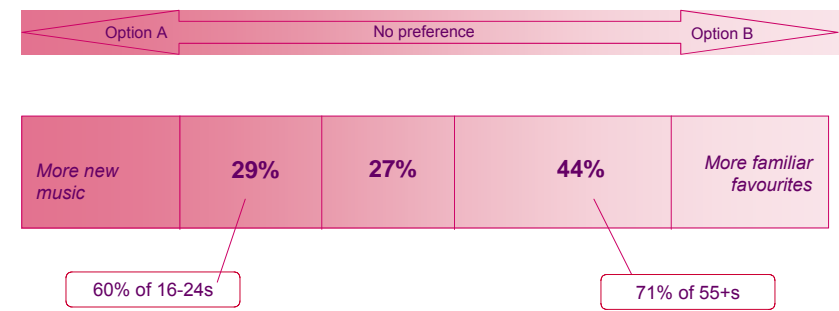
Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

25

In the focus groups an informed minority of respondents were advocates of digital radio, most often citing the new BBC channels as adding value to their radio listening repertoire.

"BBC... good new digital channels" [Belfast]

However, on the whole, the increase in choice offered by digital radio was not fully appreciated – even by those with access to digital radio. Many claimed they were using the new technology to access much the same stations as before - those who didn't have access to digital radio don't seem to feel left out, although much of this may be driven by lack of awareness.

Social benefits

Figure 17: Importance of social benefits

Q: How important do you think it is for radio in the UK as a whole to provide the followingÉ

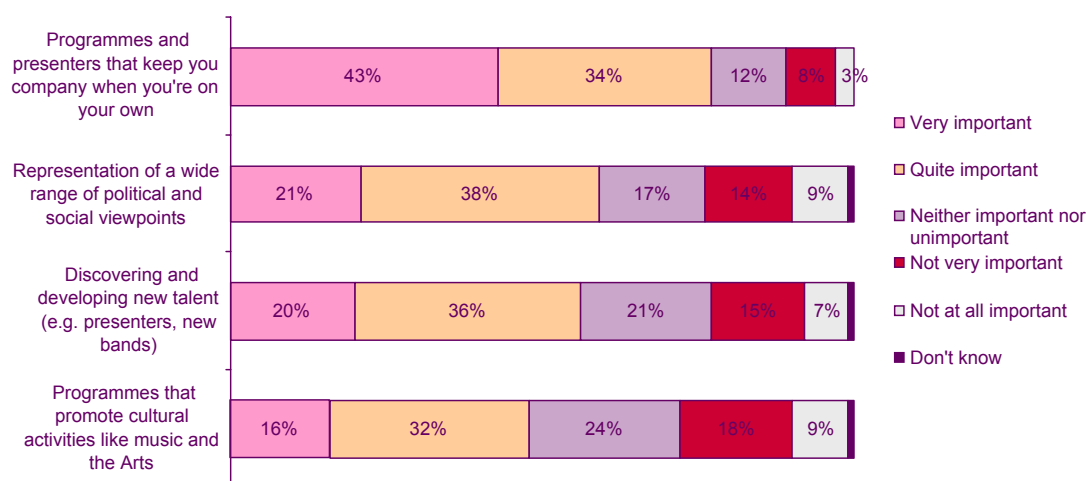|	Very important	Quite important	Neither important nor unimportant	Not very important	Not at all important
Programmes and presenters that keep you company when you're on your own	43%	34%	12%	8%	3%
Representation of a wide range of political and social viewpoints	21%	38%	17%	14%	9%
Discovering and developing new talent (e.g. presenters, new bands)	20%	36%	21%	15%	7%
Programmes that promote cultural activities like music and the Arts	16%	32%	24%	18%	9%

Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

Radio is felt to provide benefits to society as a whole. Its single most powerful benefit stems from the ability of radio to provide company. This emerged time and again in the focus groups as a valued and much-appreciated facet of radio for many people. Thinking as citizens, participants tended to define this benefit quite narrowly, citing old people, those living alone, and the visually impaired as those for whom the benefit is particularly significant. However, many respondents were grateful at a personal level for radio providing company at specific points in their own lives – particularly when travelling and at night-time.

"Better by day than TV... talk shows... go in depth about issues" [Belfast]

"The radio fills the night all in... absorbing" [Birmingham]

Moreover, there was a sense in the focus groups that there is a growing need for this kind of company. The respondents talked about an ageing population, the fact that

people are more mobile than ever before, there are smaller households and they felt there was now more shift work – all of which means that more people are spending more time on their own.

The quantitative research reflected these attitudes, with 77% rating radio's role in providing company as important. Other, more specific, social benefits were rated relatively lower. Its role in discovering and developing talent was deemed important by 58% of the total sample. However, attitudes to this attribute varied widely by age. 70% of younger listeners considered this important.

In the focus group discussions participants felt that radio has a big role to play in discovering and developing talent. In particular, the role of radio in breaking new bands is highly valued.

"It's a great feeling discovering new stuff..." [Belfast]

Some groups felt that radio could make a greater feature of this role. They felt radio should be looking for new presenter talent and new comedy talent as well as the great new bands.

"Where are the new John Peels?" [Belfast]

The cultural role of radio was also investigated. In the focus groups this was typically seen as an area of more niche interest. For some, the notion of promoting culture even raised some negative feelings such as potentially patronising listeners.
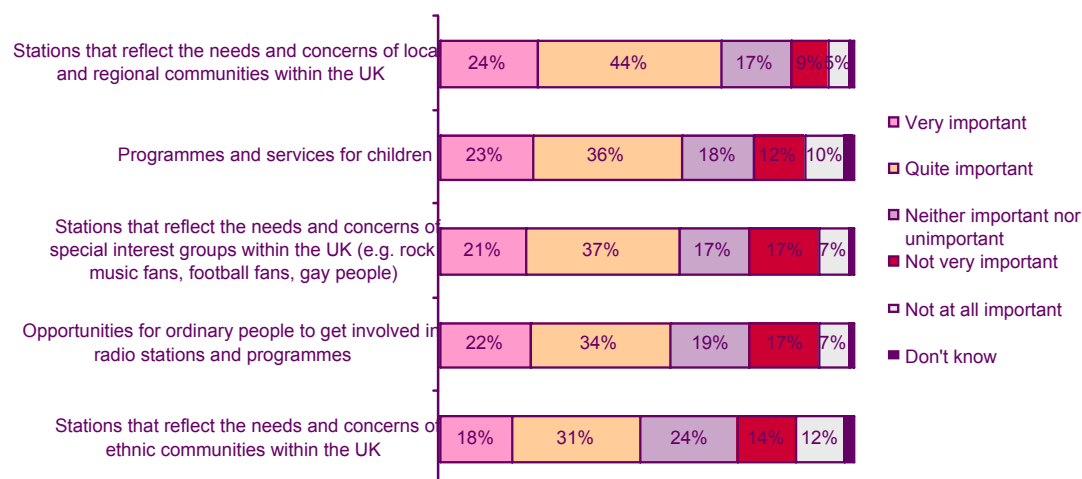
"Radio telling you what's good for you" [Aberdeen]

In the survey, 48% of respondents felt that *programmes that promote cultural activities like music and the Arts* were important purposes for radio. There was a bias towards AB listeners (56%) – this trend along with the fact that 24% of respondents remained neutral about the provision of Arts demonstrates the niche nature of this area.

Community

Figure 18: Importance of community

Q: How important do you think it is for radio in the UK as a whole to provide the followingÉ

	Very important	Quite important	Neither important nor unimportant	Not very important	Not at all important	Don't know

Stations that reflect the needs and concerns of local and regional communities within the UK: 24% | 44% | 17% | 9% | 5%

Programmes and services for children: 23% | 36% | 18% | 12% | 10%

Stations that reflect the needs and concerns of special interest groups within the UK (e.g. rock music fans, football fans, gay people): 21% | 37% | 17% | 17% | 7%

Opportunities for ordinary people to get involved in radio stations and programmes: 22% | 34% | 19% | 17% | 7%

Stations that reflect the needs and concerns of ethnic communities within the UK: 18% | 31% | 24% | 14% | 12%

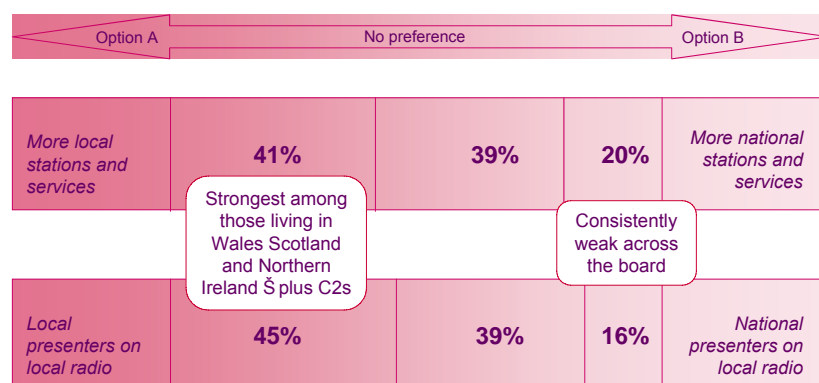Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

The research found that local radio in particular plays a role both serving communities and giving communities a sense of identity. In the focus groups, radio was singled out as the medium that communities most strongly identify with. It was seen as more local, and therefore more relevant from a community perspective, than television, yet still a large scale broadcast medium with more perceived impact than local press, for example.

"You feel like you're part of a community" [Birmingham]

Radio was felt to have an important role to play in giving local communities a sense of identity. This was equally true of, for example, rural Somerset and inner-city projects in London. Examples of non-location-specific stations succeeding in doing this were more limited (1Xtra was cited by some black respondents as doing this).

The figures from the quantitative research support this conclusion. When given the option of more local stations and services versus more national stations and services, twice as many opted for the former as for the latter. Equally, there was a strong preference for local presenters over national presenters on local radio (Figure 19). Focus group participants talked about local accents and genuine knowledge about an area adding authenticity and sincerity. This finding is in line with results of the Radio Review Phase 1 research which found that local presenters are a key element of localness and a good way of providing an 'emotional connection'.

Figure 19: Preference for local over national

	Option A		No preference		Option B	

More local stations and services	**41%**	**39%**	**20%**		*More national stations and services*

Strongest among those living in Wales Scotland and Northern Ireland Š plus C2s

Consistently weak across the board

Local presenters on local radio	**45%**	**39%**	**16%**		*National presenters on local radio*

Standards of professionalism on local radio were felt by the focus groups to have risen over the last decade, but some felt there was still room for improvement – particularly among a more upmarket younger audience who felt that local radio lacked relevance and acceptable levels of professionalism. Focus group respondents felt *high quality* presenters are few and far between on local radio. Specific examples cited were mainly limited to the BBC local stations, and some commercial local radio breakfast presenters.

Local radio was felt to involve communities in very tangible and positive ways. The visibility of presenters in the community, roadshows, and other ways of supporting local events and causes help to create empathy and trust. Local voices, requests and competitions and more direct community participation help to create a sense of ownership. For many, their local radio service is important and truly valued.

"You feel like you're part of it... it could be me" [Birmingham]

"[You] join in... you don't feel frozen out" [Birmingham]

"Local radio is more accountable to local people... a symbiotic relationship" [Birmingham]

Ofcom research conducted in 2004 looking at the performance of pilot community radio stations also demonstrated this point – respondents felt a real connection with the stations having made contact through a number of avenues including events and volunteer work.

In the quantitative research 68% felt that *stations that reflect the needs of local and regional communities* were important, and 56% felt that *opportunities for ordinary people to get involved* were important.

Services for niche audiences including children (59%), special interest groups (58%) and ethnic and communities (48%) scored lower than the more mainstream local and regional communities. However, it is important to note that in each case a significant proportion of respondents remained neutral (children 18%, special interest 17%, ethnic & religious communities 24%).
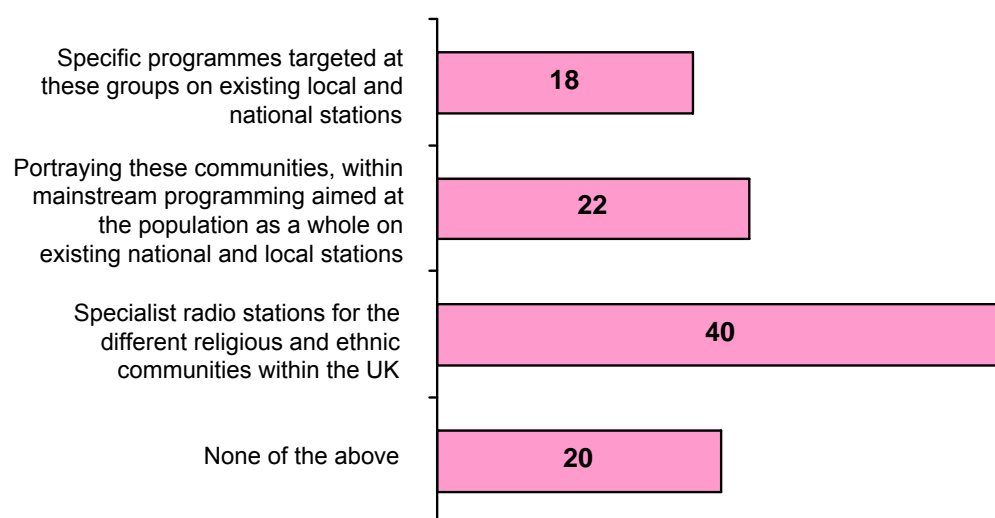
Some participants in some of the focus groups went as far as to say that separate services for ethnic and religious minorities were actually a *bad* thing. Arguments ranged from the dangers of marginalising minorities whose culture should be embraced more strongly in the mainstream media, to concerns that a small proportion of the population were being over-served relative to the majority.

"Radio should be inclusive... it's good to have a sense of belonging but..."
[Belfast]

Attitudes to non-English language services were more supportive. Most people felt there should be some provision for older people and/or those whose first language might not be English, and for UK native tongues such as Welsh. However, some respondents suggested that some English language be present on all stations to encourage integration.

With these issues in mind, we specifically asked respondents in the quantitative survey how they felt that such communities should best be served (Figure 20). Although there was not a majority view, clearly the largest group was in favour of continuing to serve such audiences with specialist stations.

Figure 20: Although not prioritised, specialist radio stations for religious and ethnic groups offer the favoured solution

Category	Value
Specific programmes targeted at these groups on existing local and national stations	18
Portraying these communities, within mainstream programming aimed at the population as a whole on existing national and local stations	22
Specialist radio stations for the different religious and ethnic communities within the UK	40
None of the above	20

Qi8: If radio in the UK is to provide programmes and services that reflect the needs and concerns of different religious and ethnic communities within the UK, which of the following do you think is the most appropriate way to do this?

Weighted Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

30

Listener Clusters

To try and help us understand listener views in more detail, we conducted a piece of statistical analysis called *Cluster Analysis* on the quantitative research data.

Cluster Analysis is a technique that splits a total research sample into groups (or *clusters)* of respondents on the basis of **attitudes** or **behaviours** that they have in common, rather than traditional demographic groupings. The analysis sets out to identify groups with as little difference as possible *within* each group (i.e. there is a high degree of similarity between people in that group), and as much difference as possible between groups (i.e. Group A is very different to Group B). A more detailed explanation of cluster analysis is featured in Appendix 1 of this document.

In this instance, we used the analysis to identify groups who have differences in the type of radio purposes and characteristics they rate as important. The analysis reveals five distinct attitude groups in the population...

Cluster 1: **Mobile Music Specialists** (14% of the sample)

The key defining aspects of this group are that they feel that provision of programmes for special interest groups is important. Most of them feel that it is important that radio provide new and live music - they are less interested in the provision of local news and speech programming. The single highest rating attribute for this group is *stations and services that are easy to receive on the move*.

Typically members of this group are young (half of them are aged between 16 and 24).

Cluster 2: **Radio Evangelists** (24% of the sample)

This group tends to rate **all** of the attributes of radio higher than the population as a whole. These people are enthusiastic about radio and feel that it is important that it offers the full range of "social goods", such as education, local news and new music. They want to be stimulated by radio. They also want to be involved in radio with this group feeling that is important for *ordinary people to get involved in radio*.

Although they have no particular demographic skew, this group is the most likely to listen in a range of locations (at breakfast, in-car, etc.). Radio is an integral part of their daily life.

Cluster 3: **Speech-Hungry** (18% of the sample)

This group's primary focus is the provision of speech programmes and stations, news and information. Radio is an important provider of company to many of them, and they tend to rate *intelligent presenters who know their own mind* and *representation of a wide range of different political and social viewpoints* more highly than others.

Members of this group tends to be older people (47% are over 55), living in the South of England, and listening to national BBC (2, 3 and 4) and commercial (Classic FM) networks.

Cluster 4: **Local Music Radio Enthusiasts** (28% of the sample)

Like Cluster 2 (although not to the same degree), this group tends to rate all attributes of radio more important than average. However, their main focus of attention is different.

They are especially likely to rate *music* (new, live and from a variety of eras) as important, and are strong advocates of radio's role as *local* medium. The group has a positive belief that radio should provide programmes tailored to the local community. They are keen news consumers with most feeling that local news, as well as national news and up-to-the minute news, is important.

A large proportion of this group are in the family lifestage (42% are aged 25-44). They tend to be the heaviest and most regular radio listeners in the population. 37% of them live in Scotland.

Cluster 5: **Entertainment Seekers** (13% of the sample)

Radio is less important overall for this group. They are most interested in music variety (by era and style), local news and witty, entertaining presenters. They are less interested in dedicated speech programming, and tend not to think that it is important for radio to provide *stimulating, challening programmes that make you think*.

Members of this group are more likely to be women (60:40 female to male ratio), with very low levels of speech radio listenership. They are the least likely of all groups to listen to any BBC station (although 68% still do).

Section A4

How satisfied are listeners with current UK radio?

Overall satisfaction

Across both pieces of research, it was clear that overall satisfaction with UK radio is high. In the quantitative research participants' average rating for their level of satisfaction was significantly over 8 out of 10.

These scores were high among all ages, all nations and all listening platforms, although there were some minor differences

- Women were more satisfied than men;
- The AB social group were less satisfied than average;
- Younger listeners were less satisfied than their older counterparts.

The principal conclusion from this, however, is that UK radio is already serving its majority audiences well.

Figure 21: Satisfaction with radio is uniformly high

Q: On a scale of 1-10 where 10 equals very satisfied and 1 equals not at all satisfied, how satisfied are you with what you listen to on the radio? Š Mean scores

Category	Score
TOTAL	8.29
AB	8.03
C2	8.48
Female	8.41
Male	8.16
16-24	7.80
55+	8.58
Analogue	8.26
Digital	8.25

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Those with access to DAB showed higher levels of satisfaction than listeners of other platforms (Figure 22). As relatively early adopters it may be that access to digital radio through DAB encourages a level of exploration which boosts satisfaction.

Figure 22: Those with access to DAB are especially satisfied with current UK radio

Q: On a scale of 1-10 where 10 equals very satisfied and 1 equals not at all satisfied, how satisfied are you with what you listen to on the radio?- Mean scores

Platform	Mean score
TOTAL	8.29
Analogue	8.26
Total Digital	8.25
DAB	8.52
DTV	8.13
Internet	8.24

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005
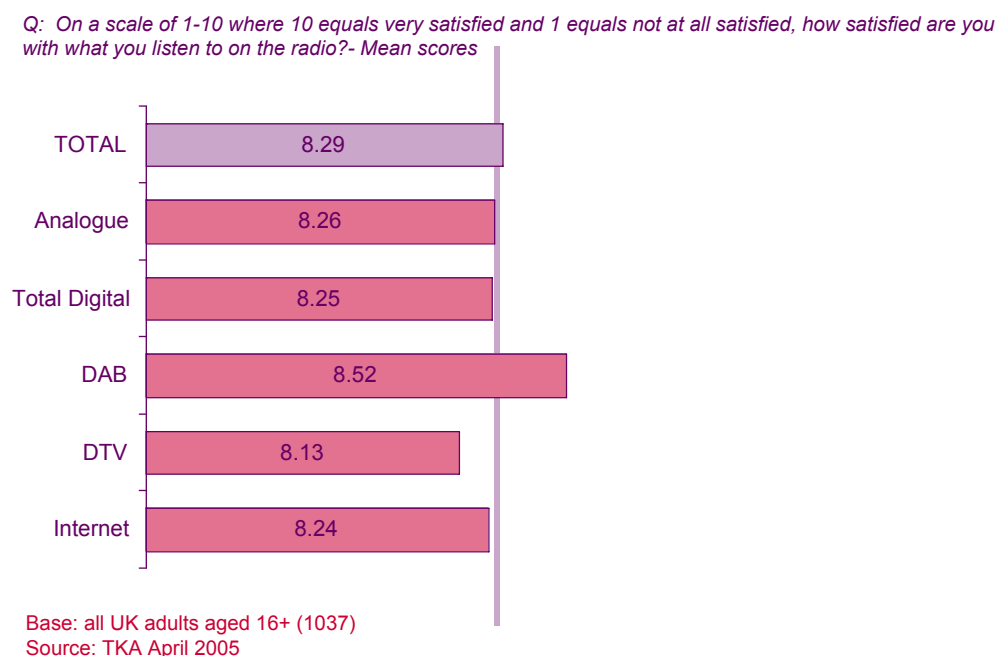
Conversely, listeners to BBC local radio are less satisfied than listeners to national BBC networks or commercial radio (Figure 23).

Figure 23: BBC local listeners are least satisfied

Q: On a scale of 1-10 where 10 equals very satisfied and 1 equals not at all satisfied, how satisfied are you with what you listen to on the radio? Š Mean scores

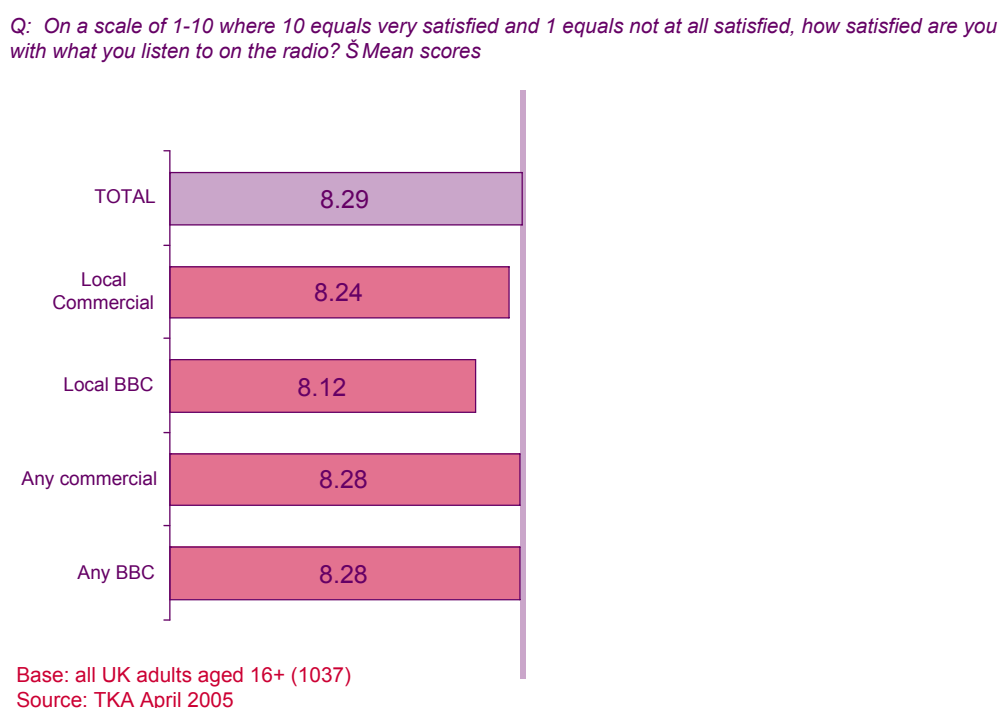| Platform	Mean score
TOTAL	8.29
Local Commercial	8.24
Local BBC	8.12
Any commercial	8.28
Any BBC	8.28

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Levels of satisfaction varied more significantly across the listener clusters described in section 3, above. Some 72% of the population as a whole expressed a high level of satisfaction with current radio in the UK (i.e. rated it at 8 out of 10 or higher). 80% of *Radio Evangelists* expressed high satisfaction – in contrast 57% of *Mobile Music Specialists* were similarly satisfied (Table 3).

Table 3: Level of satisfaction with current UK radio by cluster

	Mobile Music Specialists	Radio Evangelists	Speech Hungry	Local Music Radio Enthusiasts	Entertainment Seekers	All adults
Highly satisfied	57%	80%	66%	77%	70%	72%
Neutral	37%	17%	27%	17%	25%	23%
Dissatisfied	6%	3%	7%	6%	5%	5%

It is worth noting that the numbers of people actively dissatisfied were low in all clusters (between 3 and 7% across the different groups rated it at 5 out of 10 or lower). Most of those who were not highly satisfied were neutral to mildly positive (rating it 6 or 7 out of 10).

Satisfaction with the delivery of the most important attributes of radio

There is a strong correlation between those attributes that people think are most *important* about UK radio, and *how well* they feel those attributes are currently delivered.

Comparisons between the top ten attributes for each of these (Table 4) reveal very few differences – nine attributes are common to both.

Table 4: Top ten attributes	
In terms of importance	**In terms of satisfaction with current delivery**
Easy to receive on the move (89%)	Easy to receive on the move (88%)
Entertaining presenters (89%)	National news bulletins (88%)
Local news bulletins (88%)	Traffic and travel bulletins (86%)
Local and national weather (88%)	Local and national weather (85%)
National news bulletins (85%)	Entertaining presenters (84%)
Up-to-the-minute news and information (84%)	Up-to-the-minute news and information (83%)
Intelligent presenters (82%)	Music from different eras (83%)
Different styles of music (81%)	Different styles of music (83%)
Music from different eras (81%)	Local news bulletins (83%)
Programmes I can hear whenever I choose (79%)	Programmes I can hear whenever I choose (83%)

Figure 24, below shows an analysis of the ten most important attributes mapped against satisfaction with their current delivery. Although the correlation between the two sets of scores is quite high (as we would expect), it is apparent that there is some shortfall in perceived quality of presenters (relative to their importance).

Figure 24: Quality of presenters is the area of importance where current provision is meeting expectations least well

Weighted Base: all UK adults aged 16+ (1037)
Source: TKA April 2005
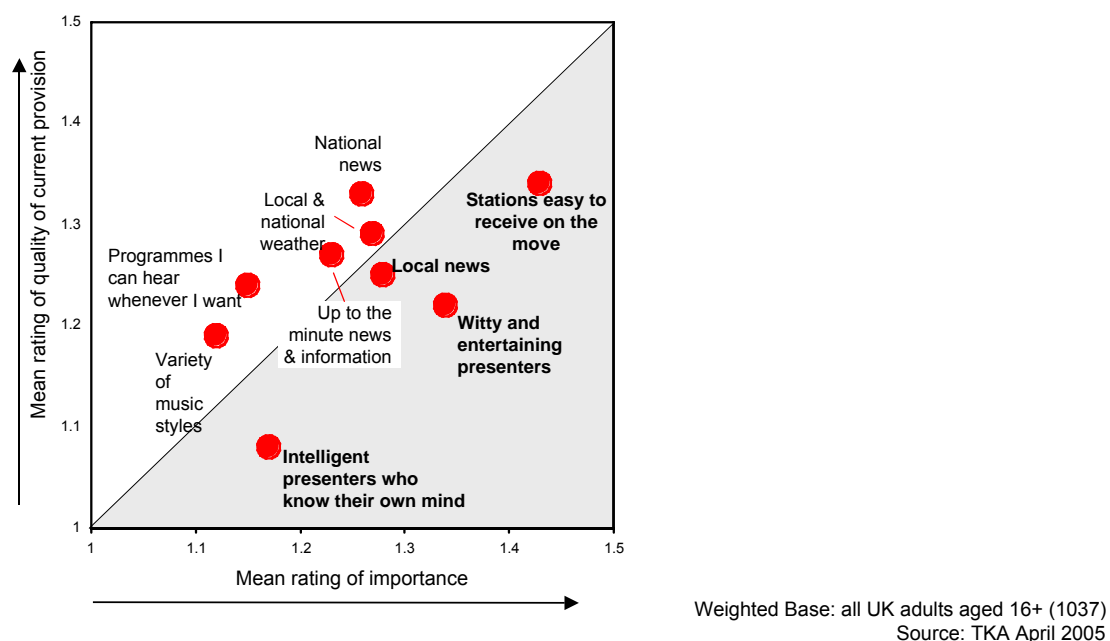
In order to help us understand what kind of presenters may be able to fill this satisfaction gap, we presented a trade-off question, giving people the option to choose between more opportunities for up-and-coming presenters, and more opportunities to hear established stars. There was a strong preference for new talent, particularly, although not exclusively, among younger listeners (Figure 25).

Figure 25: Willingness to foster new talent
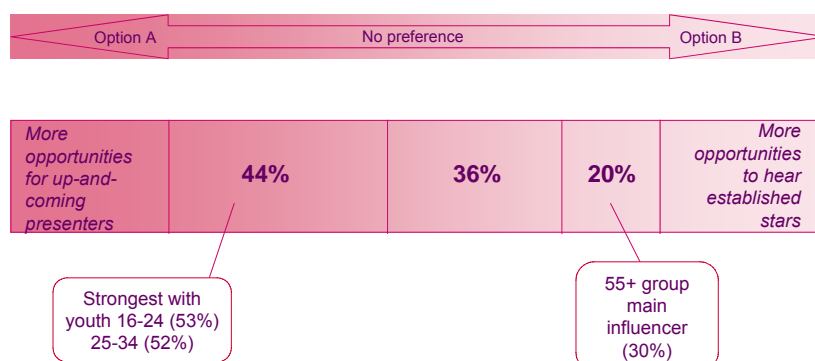
Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Across the six core components of the framework, again there is a strong correlation between importance and satisfaction with current provision, with the minor exception of *Community* (Figure 26), where there are significantly fewer people rating the relevant attributes as well delivered (mean score of 52%) than important (mean score of 58%).

Figure 26: Importance vs satisfaction with core components of radio

Q: How well each of the following is currently delivered by radio in the UK?

Access 79 / 81
Quality 76 / 73
Information 75 / 73
Variety 68 / 72
Social benefits 60 / 59
Community 58 / 52

■ Mean score for all statements in category - % rating as important

■ Mean score for all statements in category - % rating as well delivered
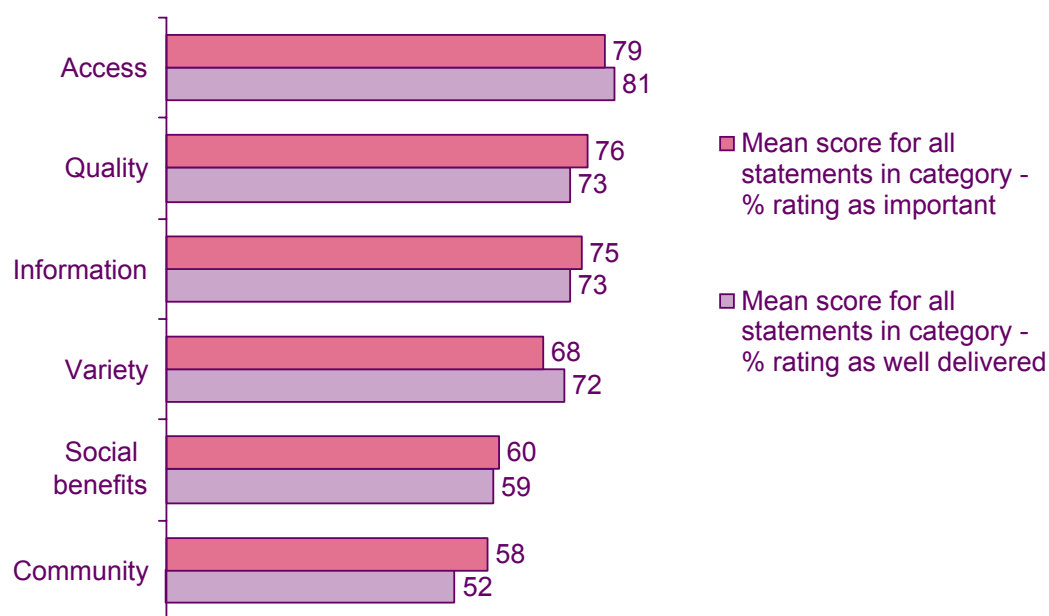
Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Access

Figure 27: Satisfaction with current delivery of Access

Q: How well is each of these features currently delivered by radio in the UK?
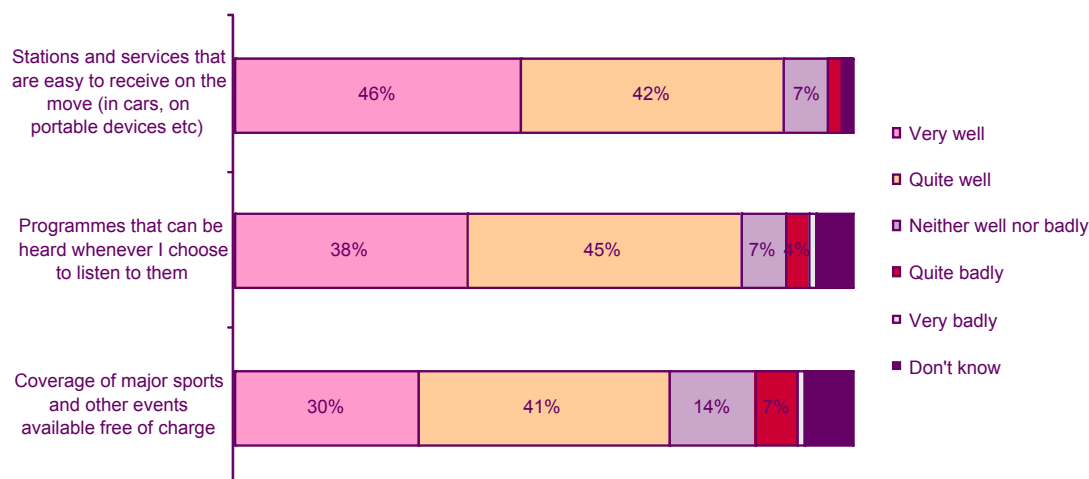
Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

Satisfaction ratings for the delivery of the attributes relating to access are high across the board (Figure 27).

DAB listeners were especially satisfied with the delivery of *programmes that can be heard whenever I choose* (94% rate very or quite well, vs 83% for the sample as a whole).

Those aged 25-44 and those living in Wales were most likely to provide a positive rating for *stations and services that are easy to receive on the move* (93% rate very or quite well). 16-24 year olds are least likely to rate this positively, but 84% still represents a high level of satisfaction.

Quality

Figure 28: Satisfaction with current delivery of Quality

Q: How well is each of these features currently delivered by radio in the UK?
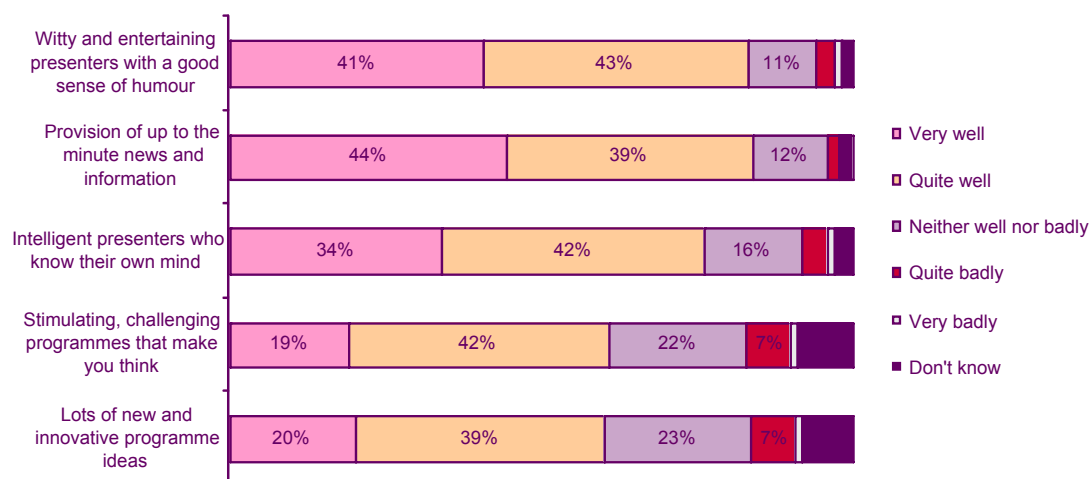
Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

Although overall satisfaction with Quality was relatively high (Figure 28), results do vary by attribute. Although the overall ratings are still highly positive there is, as we have already seen, a shortfall between those rating quality of presenters as important, and as well delivered. Some groups, however, were very happy with the quality of current presenters - listeners in Wales rate provision of *witty and entertaining presenters* particularly highly – 53% feel they are delivered very well. *Radio Evangelists* are even more positive: 60% of them think *witty and entertaining presenters* are very well delivered, and 55% of them think *intelligent presenters* are very well delivered.

There does seem to be a perceived gap in thought provoking programmes, especially for younger listeners. *Stimulating and challenging programmes that make you think* were rated as well delivered by 61% of participants in the research overall, but there are major differences between age groups – 68% of older listeners were satisfied compared to only 45% of younger listeners. Among *Mobile Music Specialists,* 46% are either negative or neutral about the current provision of *stimulating and challenging programmes* (vs 29% overall).

Information

Figure 29: Satisfaction with current delivery of Information

Q: How well is each of these features currently delivered by radio in the UK?

	Very well	Quite well	Neither well nor badly	Quite badly	Very badly	Don't know
Local and national weather reports	40%	43%	9%			
Local news bulletins and reports to keep people well informed	42%	43%	9%			
National news bulletins and reports to keep people well informed	45%	43%	7%	2%		
Traffic and travel information	47%	39%	9%			
Information about the local community (events schools etc)	25%	39%	17%	9%		
Programmes that people will feel they have learned something from	14%	45%	22%	8%		
Specialist educational programmes for children and adults	18%	25%	21%	10%		

Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

Satisfaction with the provision of news, weather, traffic and travel is very high overall – these vitally important information components of radio are clearly appreciated by listeners in their current form (Figure 29).

In relative terms satisfaction with the delivery of *programmes that people will feel they have learned something from* and, particularly *specialist educational programme*s is lower. However, these results are broadly in keeping with the strong correlation in the research data between level of importance and level of satisfaction.

Variety

Figure 30: Satisfaction with current delivery of Variety

Q: How well is each of these features currently delivered by radio in the UK?

	Very well	Quite well	Neither well nor badly	Quite badly	Very badly	Don't know
A variety of different styles of music (pop, classical, dance etc)	40%	43%	12%			
Music from a variety of different eras (60s, 80s etc)	42%	41%	11%			
Interesting information and chat around the music	33%	43%	12%			
Live music	27%	39%	19%	6%		8%
New music	32%	37%	17%	4%		8%
Radio services provided by a range of different broadcasters	26%	46%	17%			6%
A variety of speech programmes (drama, comedy, current affairs, sport etc)	25%	44%	19%			8%
A variety of speech stations (drama, comedy, current affairs, sport etc)	23%	44%	18%	5%		9%

Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

In terms of variety, satisfaction with current provision is again high, and again strongly correlated with perceived importance. The spread of music across styles and eras was rated positively by all demographic groups. Moreover, 82% of 16-24s felt that new music was either very or quite well delivered.

The listener clusters are generally satisfied with the aspects of radio variety most important to them. 71% of *Mobile Music Specialists* think *new music* is very or quite well delivered (vs 69% overall), 71% of *Speech Hungry* think that *a variety of speech programmes* are very or quite well delivered (vs 69% overall) and, among *Entertainment Seekers*, 84% are satisfied with the *variety of different styles of music*, and 89% with *music from a variety of different eras*.

Social Benefits

Figure 31: Satisfaction with current delivery of Social Benefits

Q: How well is each of these features currently delivered by radio in the UK?

	Very well	Quite well	Neither well nor badly	Quite badly	Very badly	Don't know
Programmes and presenters that keep you company when you're on your own	38%	40%	16%			4%
Representation of a wide range of political and social viewpoints	19%	38%	23%	7%		11%
Discovering and developing new talent (e.g. presenters, new bands)	19%	33%	22%	8%		15%
Programmes that promote cultural activities like music and the Arts	13%	35%	28%	9%		13%

Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005

As we saw in Section 3, above, providing *company* was the social benefit most commonly chosen as important for radio. We can similarly see (Figure 31) that it is the social benefit that radio is felt by most people to deliver well at the moment – by some considerable margin (78% versus 57% for *representation of a wide range of political and social viewpoints*).

Satisfaction levels with *programmes and presenters that keep you company* are particularly high in Wales (91%) and among the 55+ age group (82%).

Community

Figure 32: Satisfaction with current delivery of Community

Q: How well is each of these features currently delivered by radio in the UK?

Base: all UK adults aged 16+ (1,037)
Source: TKA April 2005
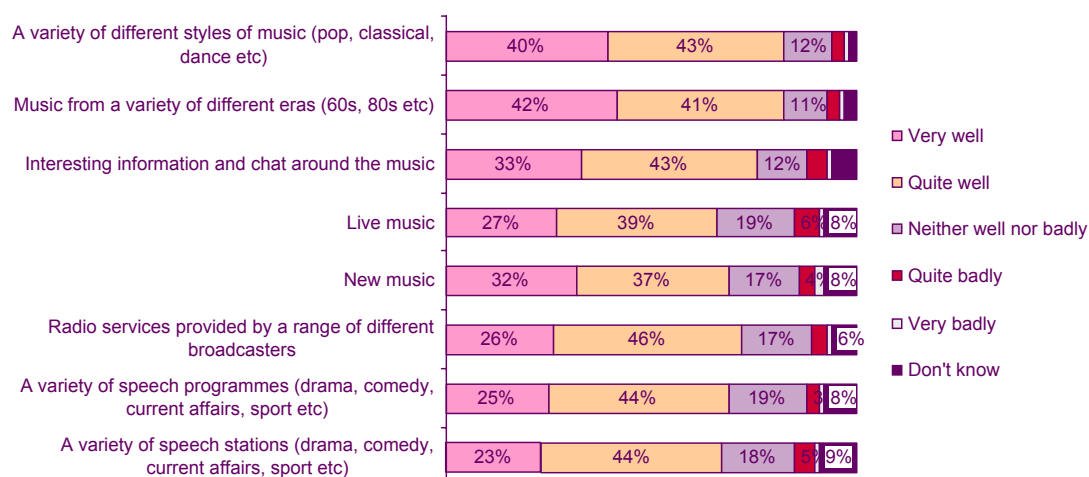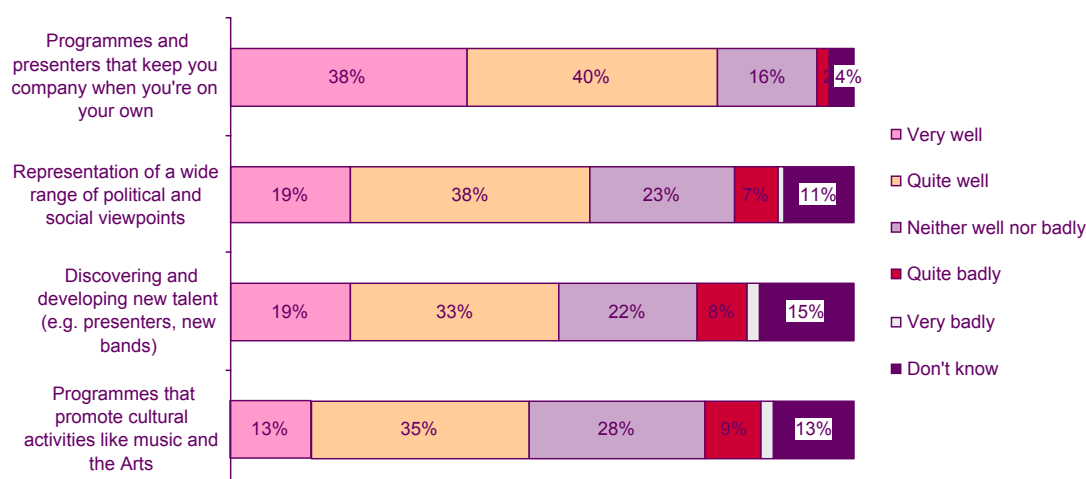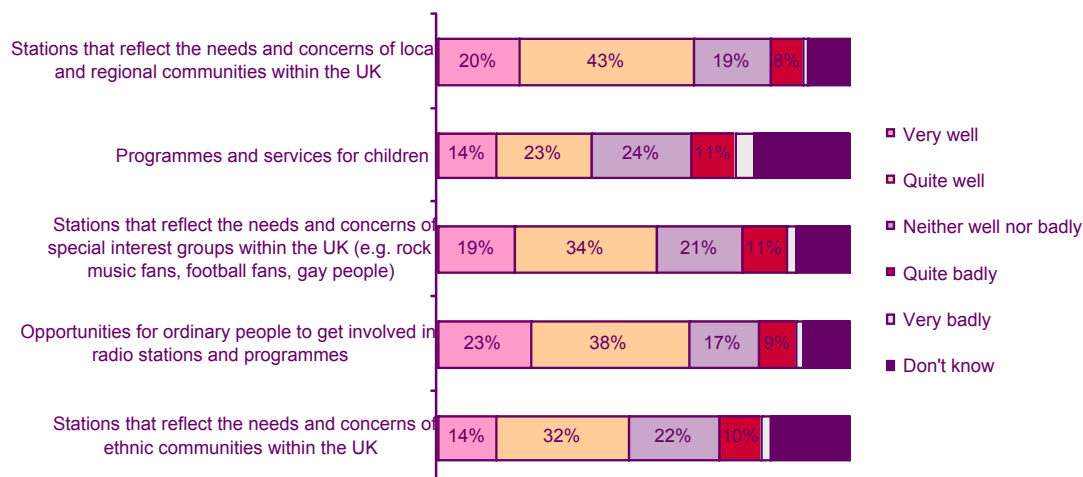
Figure 32 shows satisfaction levels with the current delivery of Community attributes. As well as being the one category where satisfaction with current provision in lowest, Community is also the category where the correlation between importance and satisfaction is much less clear.

Across all community attributes satisfaction scores were low relative to importance scores - although these importance scores were themselves relatively low. The provision of children's programming seems to score particularly poorly (Table 5).

However it is important to put this into context. From a citizen perspective respondents may think catering for a particular group (e.g. children) is important but as consumers they may have little knowledge/experience of current provision. And this is largely reflected in the distribution of attitudes to current provision of children's programming – only 15% said that this was quite or very badly delivered currently. Nearly half the sample (47%) either expressed a neutral view or chose the "Don't know" option.
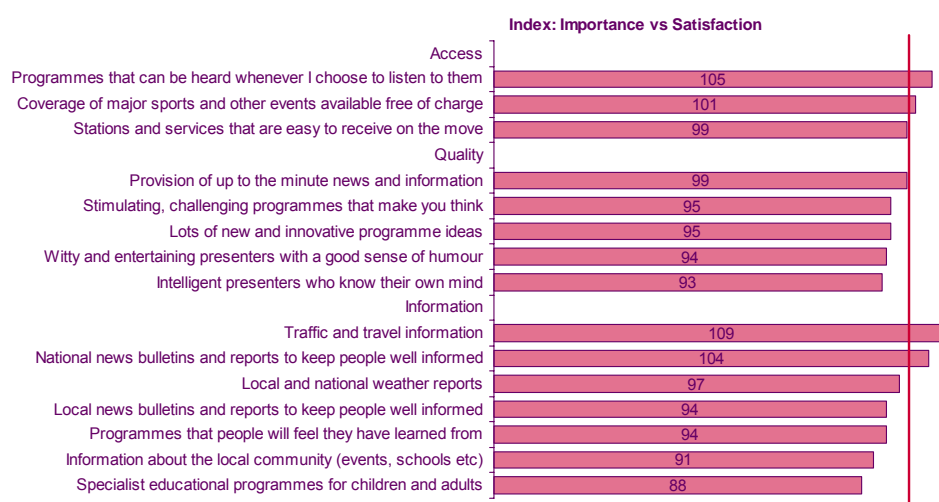
However, there were more significant levels of negative rating among some groups of the population – 28% of 16-24s, and 32% of C1s thought that *programmes and services for children* were quite or very badly delivered.
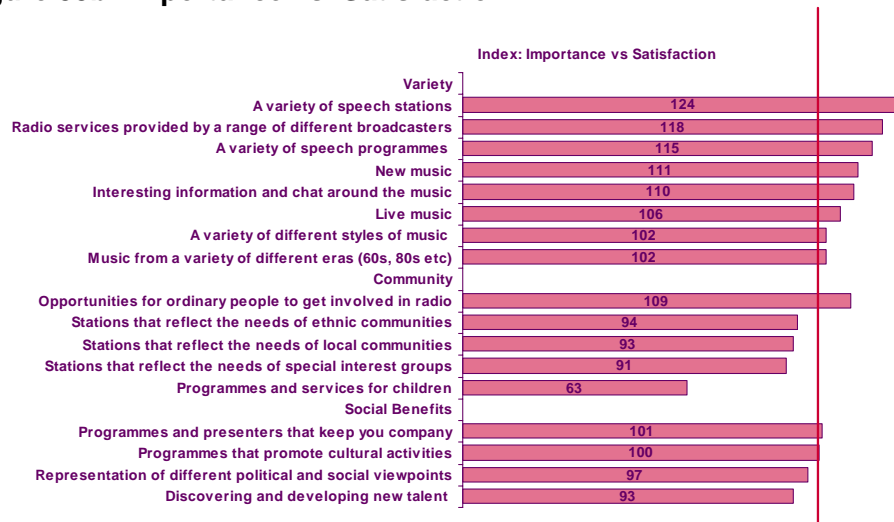
42

Table 5: Importance vs satisfaction ratings for community

Attribute	% rating as very/quite important	% rating as very/quite well delivered
Stations that reflect the needs and concerns of local and regional communities within the UK	68%	63%
Stations that reflect the needs and concerns of ethnic communities within the UK	48%	47%
Programmes and services for children	59%	37%
Stations that reflect the needs and concerns of special interest groups within the UK	58%	53%
Opportunities for ordinary people to get involved in radio stations and programmes	56%	61%
Mean rating for community	58%	52%
Mean rating for all attributes	67%	68%

Overview

Figures 33a and 33b look at the importance and satisfaction ratings of all the statements in relation to each other. An index has been calculated by taking the figures for the proportion of respondents saying a particular element is important and those who say each element is currently well delivered. A statement with an index of over 100 suggests satisfaction is higher than importance.

Figure 33a: Importance vs. Satisfaction

Index: Importance vs Satisfaction

Access	
Programmes that can be heard whenever I choose to listen to them	105
Coverage of major sports and other events available free of charge	101
Stations and services that are easy to receive on the move	99
Quality	
Provision of up to the minute news and information	99
Stimulating, challenging programmes that make you think	95
Lots of new and innovative programme ideas	95
Witty and entertaining presenters with a good sense of humour	94
Intelligent presenters who know their own mind	93
Information	
Traffic and travel information	109
National news bulletins and reports to keep people well informed	104
Local and national weather reports	97
Local news bulletins and reports to keep people well informed	94
Programmes that people will feel they have learned from	94
Information about the local community (events, schools etc)	91
Specialist educational programmes for children and adults	88

Figure 33b: Importance vs. Satisfaction

Index: Importance vs Satisfaction

	Index
Variety	
A variety of speech stations	124
Radio services provided by a range of different broadcasters	118
A variety of speech programmes	115
New music	111
Interesting information and chat around the music	110
Live music	106
A variety of different styles of music	102
Music from a variety of different eras (60s, 80s etc)	102
Community	
Opportunities for ordinary people to get involved in radio	109
Stations that reflect the needs of ethnic communities	94
Stations that reflect the needs of local communities	93
Stations that reflect the needs of special interest groups	91
Programmes and services for children	63
Social Benefits	
Programmes and presenters that keep you company	101
Programmes that promote cultural activities	100
Representation of different political and social viewpoints	97
Discovering and developing new talent	93

Based on these figures, all aspects of Variety are well delivered as the index scores are greater than 100, i.e. that satisfaction levels are higher than importance. The two key areas where satisfaction is markedly lower than importance is for p*rogrammes and services for children* (63) and s*pecialist educational programmes for children and adults* (88). As already discussed, this may be driven by the difference between citizen attitudes and consumer experience.
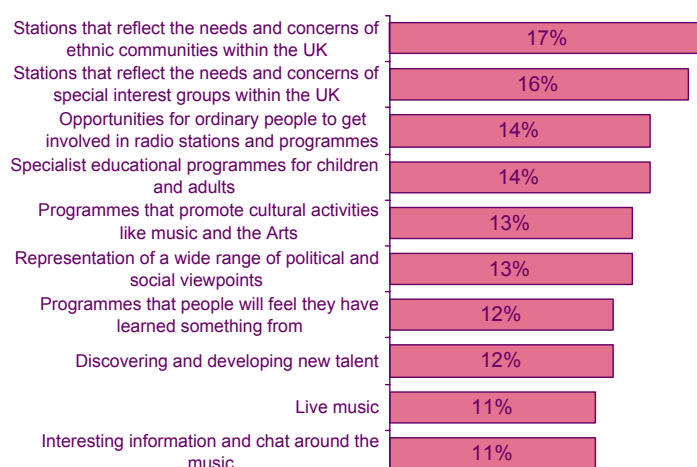
Who should be responsible for providing specific radio services?

For each of the attributes already measured for importance and satisfaction, we gave participants in the quantitative research the opportunity to say who they felt, if anyone, should have an obligation to provide it – the BBC, existing commercial broadcasters, a potential new commercial broadcaster, or no-one at all.

The first observation to make is that, consistent with the earlier findings that all the attributes have at least some importance, the numbers of people suggesting that there should be no obligation for any attribute were fairly small (Figure 34).

Figure 34: Top attributes where no obligation is considered necessary

Q: Who, if anyone, do you think should be responsible for providing each of the following… ?

Attribute	%
Stations that reflect the needs and concerns of ethnic communities within the UK	17%
Stations that reflect the needs and concerns of special interest groups within the UK	16%
Opportunities for ordinary people to get involved in radio stations and programmes	14%
Specialist educational programmes for children and adults	14%
Programmes that promote cultural activities like music and the Arts	13%
Representation of a wide range of political and social viewpoints	13%
Programmes that people will feel they have learned something from	12%
Discovering and developing new talent	12%
Live music	11%
Interesting information and chat around the music	11%

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Even for the highest rating attribute in this chart – services for ethnic communities - only 17% of those interviewed felt there should be no provision.

There were clear differences between the types of obligations most expected of the BBC, and those most expected of existing commercial radio (Table 6). Participants believed the BBC should be primarily responsible for national coverage, for speech programming and for intellectually stimulating content; commercial radio's emphasis should be music & music-related chat, local news and community information.

Certain attributes were prioritised for both BBC and existing commercial stations – ease of access to programmes and services, up-to-the-minute news and information, and entertaining presenters.

Table 6: BBC vs. existing commercial radio - Top obligations

BBC	Commercial
National news (74%)	Local news (67%)
Up-to-the minute news (72%)	Local and national weather (66%)
Easy to receive on the move (72%)	Music from a variety of eras (66%)
Traffic and travel info (69%)	Traffic and travel info (65%)
Intelligent presenters (67%)	Music of different styles (65%)
Variety of speech programmes (66%)	Easy to receive on the move (62%)
Witty and entertaining presenters (65%)	Witty and entertaining presenters (62%)
Variety of speech stations (64%)	Local community information (61%)
Hear whenever I choose (62%)	Up-to-the-minute news (59%)
Stimulating and challenging (62%)	Information and chat around music (59%)

Focusing on the most important attributes for radio as a whole reinforces this perception of a complementary role for the BBC and commercial radio (Figure 35). Commercial broadcasters are expected by more people to have a responsibility to deliver local services despite the presence of BBC local radio.

Figure 35: Broadcaster obligations for top five radio attributes by importance

Most important attributes	BBC	Existing commercial	New Commercial	No obligation
Stations and services that are easy to receive on the move	72	62	18	6
Witty and entertaining presenters with a good sense of humour	65	62	18	8
Local news bulletins and reports to keep people well informed	57	67	16	7
Local and national weather reports	62	66	16	6
National news bulletins and reports to keep people well informed	74	56	15	7

BBC seen as universal provider: access and coverage

Commercial stations perceived to be more local than BBC

Level of obligation increases with importance

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

With regards to those attributes rated as important by fewest respondents, the perceived responsibility for provision is skewed towards the BBC (Figure 36).

46

Figure 36: Broadcaster obligations for least important radio attributes

Least important attributes	BBC	Existing commercial	New Commercial	No obligation
Discovering and developing new talent	51	48	30	12
A variety of speech stations	64	42	17	9
Stations that reflect the needs and concerns of ethnic communities in the UK	47	32	28	17
Specialist educational programmes for children and adults	54	24	23	14
Programmes that promote cultural activities like music and the arts	54	30	24	13

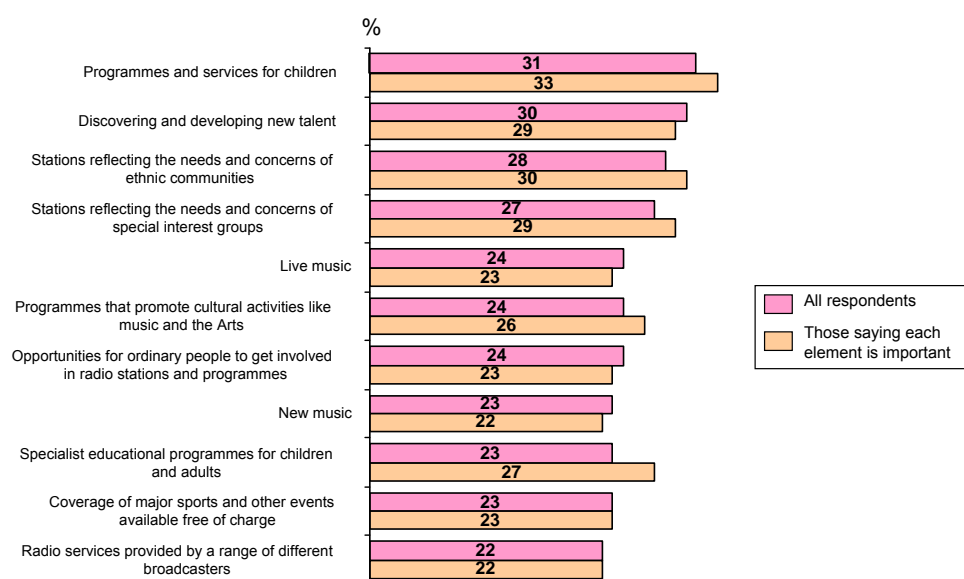BBC seen as provider for minority interests

Level of obligation declines with lack of importance

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Respondents were also given the opportunity to suggest potential responsibilities for a new commercial station. As can be seen from Figure 37, this was mostly seen as an opportunity to channel specialist interest content into a discrete vehicle.

Top of the list were programmes for children; ethnic and special interest groups feature strongly in the top ten, as well as more specialist *content* such as live music, educational programmes and sporting events.

In some cases, those who felt that an attribute was important were particularly likely to suggest that a new commercial radio station should be tasked with providing it – most notably 33% of those wanting *programmes and services for children*, 30% of those wanting *stations reflecting the needs and concerns of ethnic communities*, 27% of those wanting *specialist educational programmes for children and adults*, and 26% of those wanting *programmes that promote cultural activities like music and the Arts*.

Figure 37: Obligations for a new commercial radio station

%

Category	All respondents	Those saying each element is important
Programmes and services for children	31	33
Discovering and developing new talent	30	29
Stations reflecting the needs and concerns of ethnic communities	28	30
Stations reflecting the needs and concerns of special interest groups	27	29
Live music	24	23
Programmes that promote cultural activities like music and the Arts	24	26
Opportunities for ordinary people to get involved in radio stations and programmes	24	23
New music	23	22
Specialist educational programmes for children and adults	23	27
Coverage of major sports and other events available free of charge	23	23
Radio services provided by a range of different broadcasters	22	22

Weighted Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Qi3: Who, if anyone, do you think should be responsible for providing each of the followingÉ ?

Similarly, in the focus groups, children were singled out as a group meriting special consideration. Radio was felt to be good for children as an educative medium that forces people to use their imagination. Some participants had fond memories of their own childhood listening, and there was little awareness of any current provision for this audience. The potential for in-car entertainment, and bedtime stories was felt to be particularly strong. However, there was considerable suspicion as to whether or not children would actually *want* to listen to such a service.

The broader issue of plurality of provision was explored further in the research, but there was little evidence from this research to suggest that greater plurality *per se* would be welcomed by the listening public.
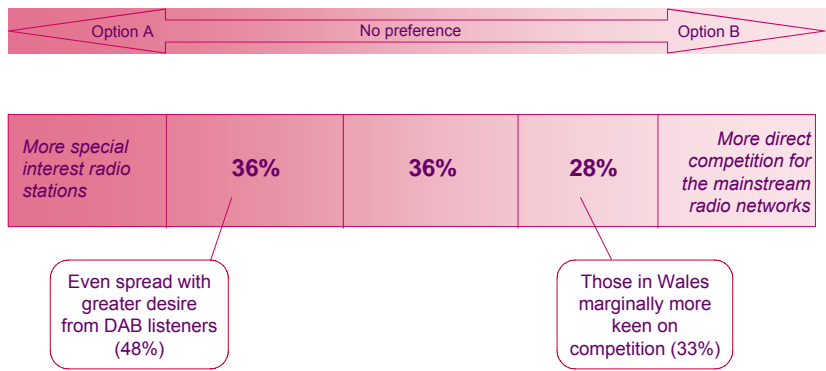
Many participants in the focus groups struggled to understand why you would want radio services provided by a range of suppliers – and especially those who felt that BBC services were already superior to "the competition". Those with access to a wider range of competing radio services (those in major conurbations and digital users) were more cynical and talked about their experience of commercial competition crowding the middle ground.

However a minority of the most critical listeners, and especially some Radio 4 listeners, did feel that the introduction of some more direct and high quality competition could help the BBC to raise its standards.

Within the quantitative survey we specifically asked people to prioritise between more special interest radio stations and more direct competition for the main networks. There was no clear preference either way, although there was a marginal preference for more specialist stations (Figure 38).

Figure 38: No clear preference for special interest stations or creating competition for more mainstream radio

Option A	No preference	Option B

More special interest radio stations	36%	36%	28%	More direct competition for the mainstream radio networks

Even spread with greater desire from DAB listeners (48%)

Those in Wales marginally more keen on competition (33%)

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

49

Section A6

Interest in pay radio

Both stages of research touched on the notion of subscription based radio stations. Although this was by no means a comprehensive exploration of the subject, it does offer some useful indicative insight.

In the qualitative research, there was no specific brief to examine attitudes to pay radio. However, the idea did emerge spontaneously in several of the groups within discussions about the future of radio, and potential future entrants into the radio market.

Here the idea of paid-for radio services tended to be associated with the possible entry of Sky into the radio market, which provoked mixed emotions. The principal objection was that many feared that listeners would have to start paying for services they have traditionally received *for free* - football coverage was the main example cited, given the precedent of multichannel television.
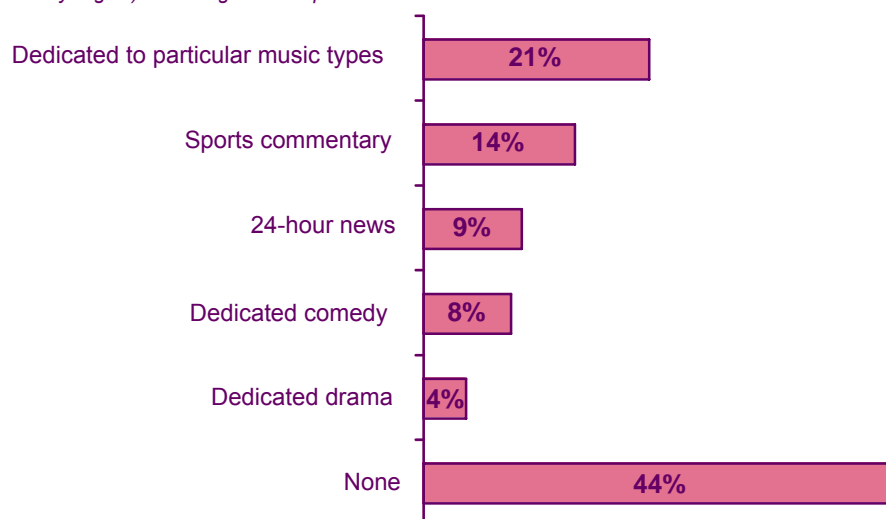
There were, however, some highly positive reactions, especially from some of those with access to digital television. Citing the precedent of Sky's "excellent" live sports and news formats, some suggested that Sky would bring some much needed innovation into the radio market.

"Like a breath of fresh air" [Birmingham]

In the quantitative research, participants were asked which one of a range of different **new services** would they most consider paying a subscription of £3 a month for (Figure 39). The two clear leaders were stations dedicated to particular music types (21%), and sports commentary (14%).

Figure 39: Some appetite for subscription services, dominated by music and sport

Q: Which of the following services which you canõget at the moment would you be willing to pay a subscription (similar to Sky Digital) in the region of £3 per month ?

Although results should be interpreted with some caution (these figures would not necessarily lead to similar take-up figures), it is interesting to see some level of interest given that listeners do not currently pay for radio content. In total, 56% of those asked expressed some interest in pay radio.

As might be expected, there were significant differences in level of interest between men and women (Table 7). Men were more interested in sports and news, women in music, comedy and drama. Similarly 16-24s were more interested in paying for music and/or sports commentary than older respondents.

Table 7: Split interests by sex

Q: For which of the following services which you can't get at the moment would you be willing to pay a subscription (similar to Sky Digital) in the region of £3 per month		
	Male	*Female*
Dedicated to particular music types	17%	25%
Sports commentary	23%	6%
24-hour news	11%	6%
Dedicated comedy	7%	9%
Dedicated drama	3%	5%
Base: all UK adults aged 16+ (1037) Source: TKA April 2005		

Lastly there are some interesting variations across the listener clusters...

- *Radio Evangelists* are again the most enthusiastic group overall. They scored above average for all concepts - 33% (vs. 44% overall) were not interested in any of the concepts on offer.

- 26% of *Mobile Music Specialists* were interested in stations dedicated to particular music types.

- *Speech Hungry* were particularly interested in 24 hour news (13%) and drama (10%) stations.

- *Local Music Radio Enthusiasts* were especially interested in sports (18%).

- *Entertainment Seekers* were the least interested group. 52% were not interested in any of the concepts on offer.

Consumer vs. citizen perspectives

People don't naturally think of radio as a "public service" – and there was certainly less resonance for the phrase among radio listeners than among television viewers who participated in the research for the PSB Television Review.

When pressed, the focus group participants tended to define radio's "public service" in very narrow terms – public information, free for all, and catering for special needs audiences (especially the visually impaired). Such characteristics and obligations tended to be linked exclusively to the BBC.

However, the groups strongly believed that radio provides considerable benefits to society, including companionship, mood management (stress relief, getting the working populace out of bed in the morning, etc.), and championing local causes.

To explore the differences between the personal and social value of radio in more detail, we asked participants in the quantitative research to choose in rank order from the following list of different content types the five they considered most valuable from their own personal perspective, and the five they considered most important to society as a whole.
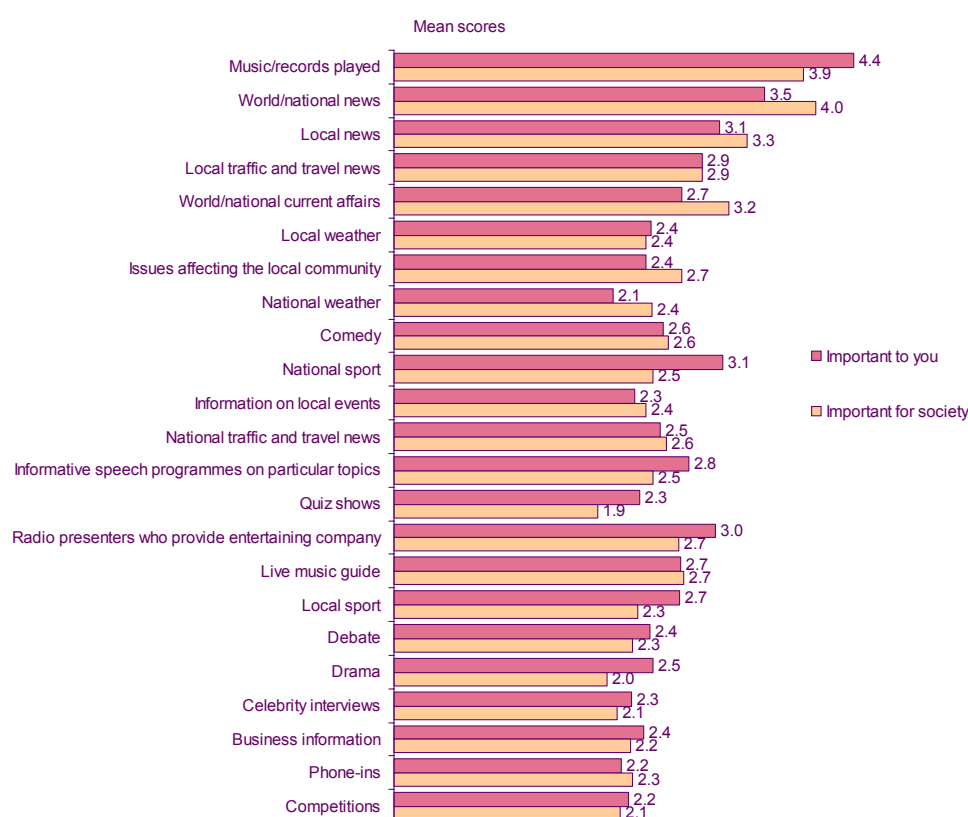
- Music/records played
- World/national news
- Local news
- Local traffic and travel news
- World/national current affairs
- Local weather
- Issues affecting the local community
- National weather
- Comedy
- National sport
- Information on local events
- National traffic and travel news
- Informative speech programmes on particular topics
- Quiz shows
- Radio presenters who provide entertaining company
- Live music guide
- Local sport
- Debate

- Drama

- Celebrity interviews

- Business information

- Phone-ins

- Competitions

This was a specific attempt to separate consumer and citizen perspectives (and thus to gain some insight into what constitutes *public* purposes for radio).

Figure 40 shows the mean scores given for each content type based on the importance placed on each by respondents for them personally and for society.

Figure 40: Personal vs. Societal importance of content types

Mean scores

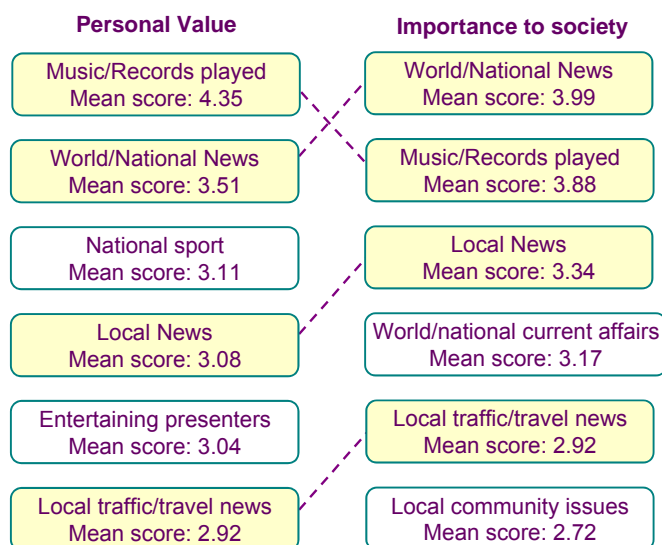| Content type	Important to you	Important for society
Music/records played	4.4	3.9
World/national news	3.5	4.0
Local news	3.1	3.3
Local traffic and travel news	2.9	2.9
World/national current affairs	2.7	3.2
Local weather	2.4	2.4
Issues affecting the local community	2.4	2.7
National weather	2.1	2.4
Comedy	2.6	2.6
National sport	3.1	2.5
Information on local events	2.3	2.4
National traffic and travel news	2.5	2.6
Informative speech programmes on particular topics	2.8	2.5
Quiz shows	2.3	1.9
Radio presenters who provide entertaining company	3.0	2.7
Live music guide	2.7	2.7
Local sport	2.7	2.3
Debate	2.4	2.3
Drama	2.5	2.0
Celebrity interviews	2.3	2.1
Business information	2.4	2.2
Phone-ins	2.2	2.3
Competitions	2.2	2.1

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Certain content types were valued slightly more highly in terms of listeners' personal needs than those of society as a whole, most notably music, sport and entertaining presenters. Other types are more highly rated in terms of their value to society as a whole – local, national and world news, current affairs, weather and issues affecting the local community.

However, overall, content types that are rated as important to listeners personally are also rated as important to society as a whole. Figure 41 shows the top ranking content types for personal value and for importance to society.

Figure 41: Importance of content types

Personal Value	Importance to society
Music/Records played Mean score: 4.35	World/National News Mean score: 3.99
World/National News Mean score: 3.51	Music/Records played Mean score: 3.88
National sport Mean score: 3.11	Local News Mean score: 3.34
Local News Mean score: 3.08	World/national current affairs Mean score: 3.17
Entertaining presenters Mean score: 3.04	Local traffic/travel news Mean score: 2.92
Local traffic/travel news Mean score: 2.92	Local community issues Mean score: 2.72

Base: all UK adults aged 16+ (1037)
Source: TKA April 2005

Participants do make *some* distinctions between what's good for them and what they think is good for society - their rankings for society are marginally more information and community oriented. However, what is most striking is the similarity between the two lists (four out of six content types are common to both) - this suggests that most respondents feel that what is good for *them* is good for *society*.

Technical Appendix

Cluster analysis

When looking at sample results, it is useful to understand whether the respondents can be placed into groups with similar attitudes or behaviours. If this is possible, then these groups can be used to analyse responses to other questions to see if they have similarities, such as being in similar age groups or having access to the internet. Such groups are known as "clusters". Due to wide range of question types, the dataset was too complex to be efficiently arranged directly into groups or clusters. Therefore, the data was analysed first to determine the most appropriate question set.

The question subset which was used to identify the clusters was those that related to how important respondents believed it was for radio to provide certain types of content, programmes, opinion and channels. The full question set used are given at the end of the section. The other subset considered was satisfaction with provision – however, this contained a large group of people who responded "Don't Know" to these questions. The question blocks that related to whether obligations to provide specific services should be placed on particular broadcasters and the trade-off questions were not amenable to this type of analysis.

There are several statistical techniques which can be used to form "clusters". The exact technique used here was "K-mean cluster analysis". This means that groups were identified by looking at responses to a set of questions and grouping those individuals with similar responses. Once the groups had been identified, the mean score for each factor for each cluster was used to separate the groups. This made it possible to obtain a picture of how the question responses and clusters related to each other and of the profile of each cluster.

This resulted in five clusters: Mobile Music Specialists, Radio Evangelists, Speech Hungry, Local music radio enthusiasts and Entertainment Seekers. These five clusters contain 96% of all respondents. However, 4% of respondents did not fit into one of these clusters and are excluded from further analysis.

The results of the analysis were checked by performing an exercise known as "discriminant analysis". This technique can be useful for situations in which you wish to determine the characteristics that fit people into specific groups. The procedure identifies those attitudinal statements which are most important in determining if a member should belong to a particular group. Additionally, they can be applied to existing groups to check the accuracy of the original clustering process. The discriminant analysis assigned respondents to the correct clusters 91% of the time.

Discriminant analysis can also be used to identify the key questions which segment the clusters. These key questions are usually grouped into themes or functions that polarise respondents in a similar way. These functions can be used to describe the clusters and to explain the differences between the groups.

Five functions or themes were identified from the discriminant analysis of the clusters. These functions identified the relative importance of key types of programming in identifying the clusters. The differentiating key themes were: providing a "social good" and meeting the needs of communities, providing new and live music, providing up-to–the minute local, national news and weather, providing stimulating and innovative programmes and providing speech and drama programmes.

The five functions are listed in the following table, with a measure of the impact they have on discriminating between the clusters. As the top two themes explain 91% of the difference between the clusters, a graphical plot of these two alone provides a pictorial representation of the identified clusters (shown below).

Function	Description	% Difference Explained
1	Radio programmes that provide "social goods" and meet the needs of local, regional and ethnic communities	79.2%
2	Radio stations that provide new and live music	11.9%
3	Radio stations that provide up-to-minute local and national news and weather	7.1%
4	Radio stations that provide stimulating and innovative programmes	1.4%
5	Radio stations/programmes that provide speech programmes (drama, comedy etc)	0.4%

Canonical Discriminant Functions

57
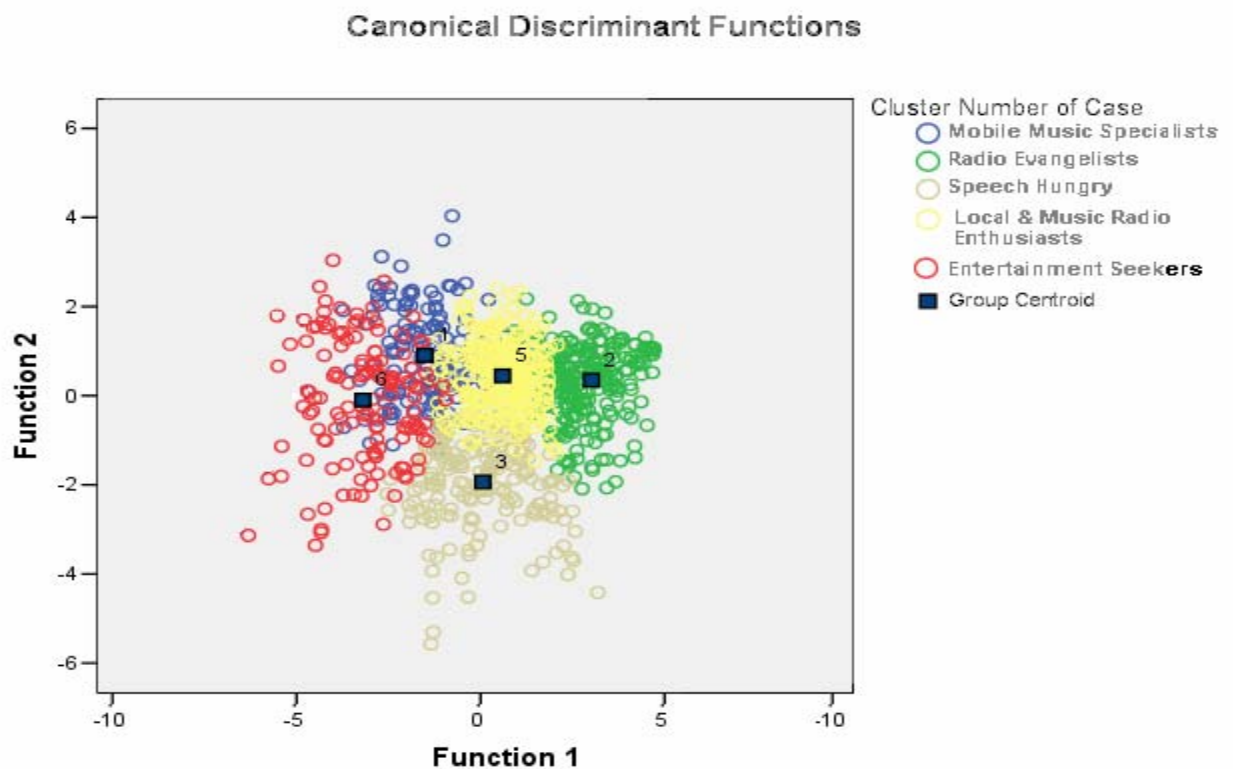
Question Set used in Cluster Analysis

These same functions are used to identify a reduced key question set, which would need to be asked in future surveys, to segment the responses into the same groups. The identified key questions are highlighted in red on the full question set table.

Q. How important do you think it is for radio in the UK as a whole to provide the following...

Scale: Very important
        Quite important
        Neither important or unimportant
        Not very important
        Not at all important
        Don't Know

Programmes that can be heard whenever I want to listen to them.
Stations and services that are easy to receive on the move (in cars, on portable devices, etc.)
A variety of speech programmes (drama, comedy current affairs, sport, etc.)
A variety of speech stations (drama, comedy current affairs, sport, etc.)
Live music
New music
Interesting information and chat around the music
A variety of different styles of music (pop, classical, dance, etc.)
Music from a variety of different eras (60s, 80s, etc.)
Lots of new and innovative programme ideas
Stimulating and challenging programmes that make you think
Witty and entertaining presenters with a good sense of humour
Intelligent presenters who know their own mind
Programmes and presenters that keep you company when you're on your own
Traffic and travel information
Information about the local community (events, schools, etc.)
Local and national weather reports
Local news bulletins and reports to keep people well informed
National news bulletins and reports to keep people well informed
Provision of up-to-the-minute news and information
Specialist educational programmes for children and adults
Programmes that people will feel they have learned something from
Programmes that promote cultural activities, like music and the Arts
Opportunities for ordinary people to get involved in radio stations and programmes
Discovering and developing new talent (e.g. presenters, new bands)
Radio services provided by a range of different broadcasters
Representation of a wide range of different political and social viewpoints
Stations that reflect the needs and concerns of local and regional communities within the UK
Stations that reflect the needs and concerns of ethnic communities within the UK
Stations that reflect the needs and concerns of special interest groups within the UK (e.g. rock music fans, football fans, gay people)
Coverage of major sports and other events available free of charge
Programmes and services for children