

BBC Trust Service Review

Radio 1, 1Xtra, Radio 2, Radio 3, 6 Music and Asian Network

Annex: Supporting performance analysis

March 2015



Contents

- 1) Network Music Radio portfolio performance.....3
- 2) Radio 16
- 3) 1Xtra..... 10
- 4) Radio 2 11
- 5) 6 Music 14
- 6) Radio 3 16
- 7) Asian Network..... 18

RQIV framework

The RQIV performance framework is a standard part of the Trust’s Service Reviews and is used as a basis for this performance analysis.

Reach: the extent to which BBC services are used by the audience

Quality: measured in terms of audience perception of various aspects of the quality of programmes and channels

Impact: the extent to which BBC content delivers the BBC’s public purposes. The audience research and public consultation are the primary evidence sources we use to assess delivery here.

Value for money: a consideration of performance alongside cost to provide a perspective on cost-effectiveness.

This report is focused on reach and quality. Impact is mainly measured by the delivery of the public purposes, which we have assessed through bespoke research; value for money is assessed in the main report via a financial analysis of the service

Metrics used

In this pack we use the following metrics:

- **Weekly reach** – the number of people (or percentage of a population) that listen to a station for at least five minutes in a given week.
- **Hours per listener** – the average number of hours each listener spends listening to the station each week.
- **Appreciation Index (AI)** – Scores based on a rating out of 100 from the BBC’s Pulse survey. Respondents are asked to rate the programme they have listened to out of 10 which is averaged up to give a rating out of 100.

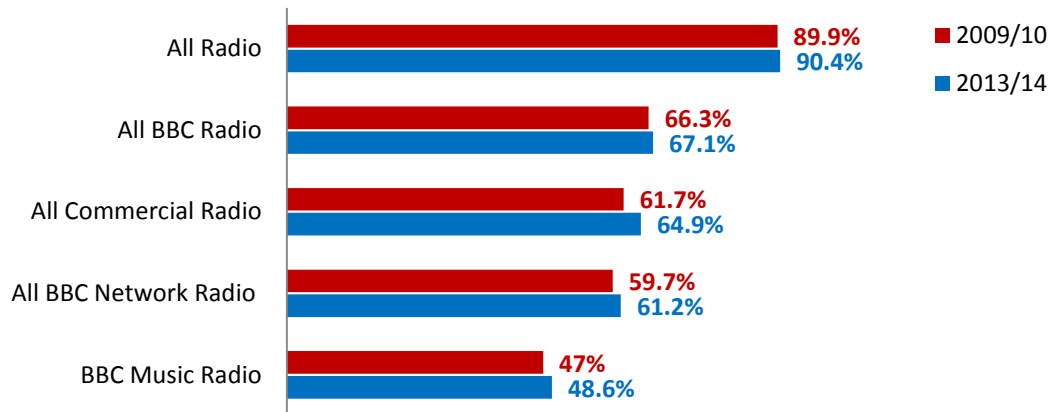
1) BBC Music Radio portfolio performance

This section presents the performance of the BBC network music radio portfolio overall (i.e. the combined performance Radio 1, 1Xtra, Radio 2, 6 Music, Radio 3 and Asian Network). We consider BBC music radio's performance in serving audiences overall as well as by age, socio-economic status and ethnic background, and in different parts of the UK.

Reach

Nine out of ten adults in the UK listen to the radio each week – a figure that has remained stable for the past four years. All BBC radio reaches 67% of adults each week and BBC Network radio (which excludes the BBC's Local and National radio stations) reaches 61%. Within the BBC's radio offer, the six music stations have a combined reach of 49%, up from 47% in 2009/10. Reach of commercial radio has increased from 62% in 2009/10 to 65% in 2013/14, as shown in Figure 1.

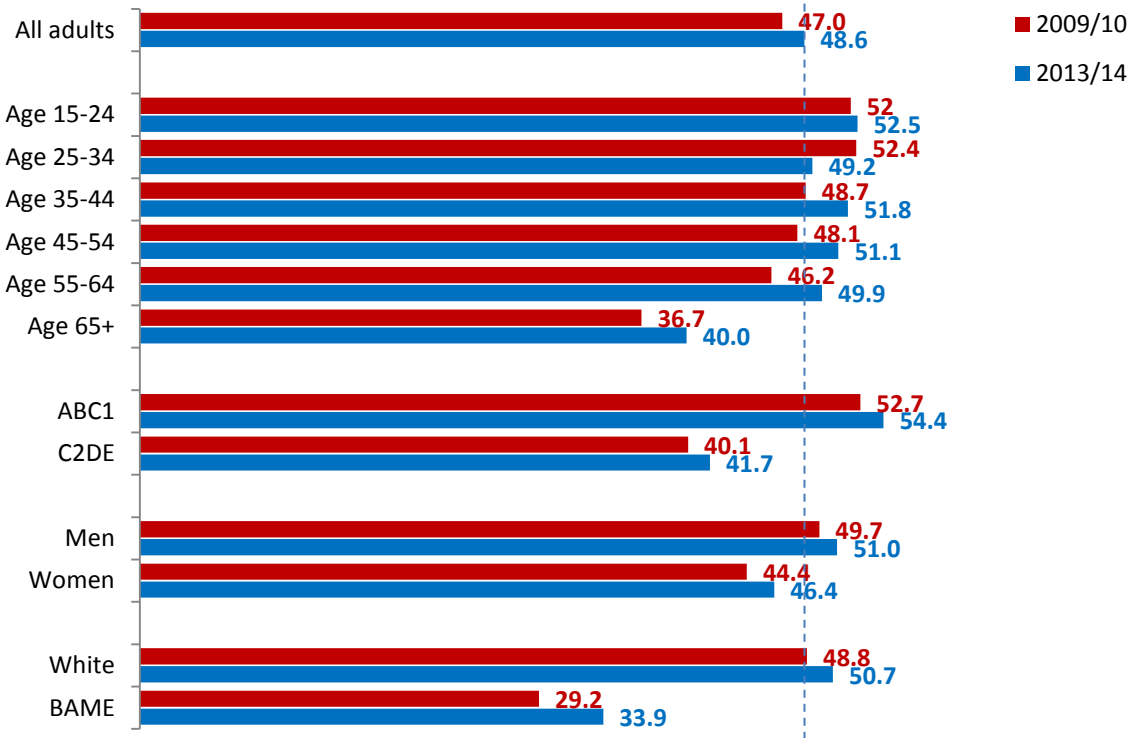
Figure 1: Weekly reach (%) of UK radio services, 2009/10 & 2013/14



Source: RAJAR

By demographic, BBC music radio's reach has increased since 2009/10 for all age groups except 25-34 year olds where it has declined by 3% points. Reach has increased among both ABC1 and C2DE adults, and among men and women. Reach has increased by 4% points among black, Asian and minority ethnic (BAME) adults, although it remains significantly lower than average, as shown in Figure 2.

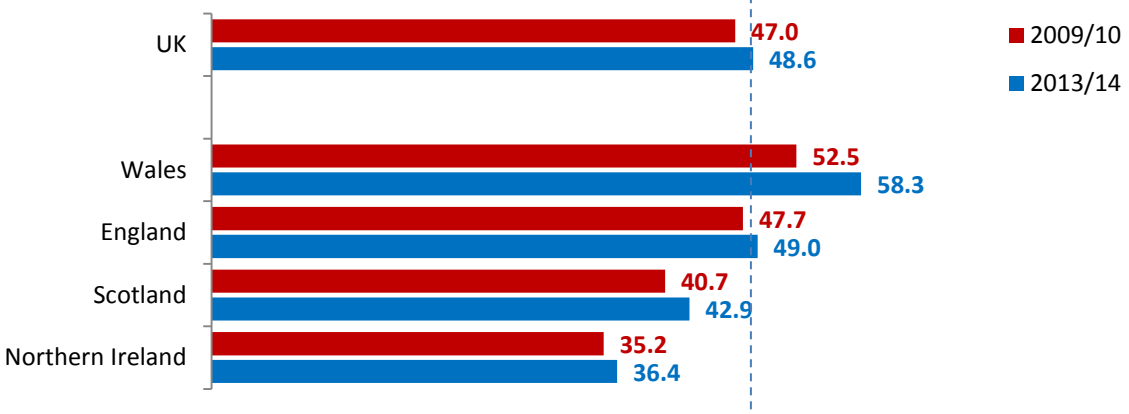
Figure 2: BBC music radio reach (%) by demographic, 2009/10 & 2013/14



Source: RAJAR

By nation, reach of BBC music radio is lowest in Northern Ireland. To some extent this is countered by Radio Ulster/Foyle’s popularity (which is listened to by 36% of adults in Northern Ireland each week, well above the UK average for the BBC’s local/national stations, of 18%), although overall reach of BBC Radio is still lower than average. Reach of BBC music radio is also slightly lower than average in Scotland, and highest in Wales, as shown in Figure 3.

Figure 3: BBC music radio reach (%) by nation, 2009-10 & 2013-14



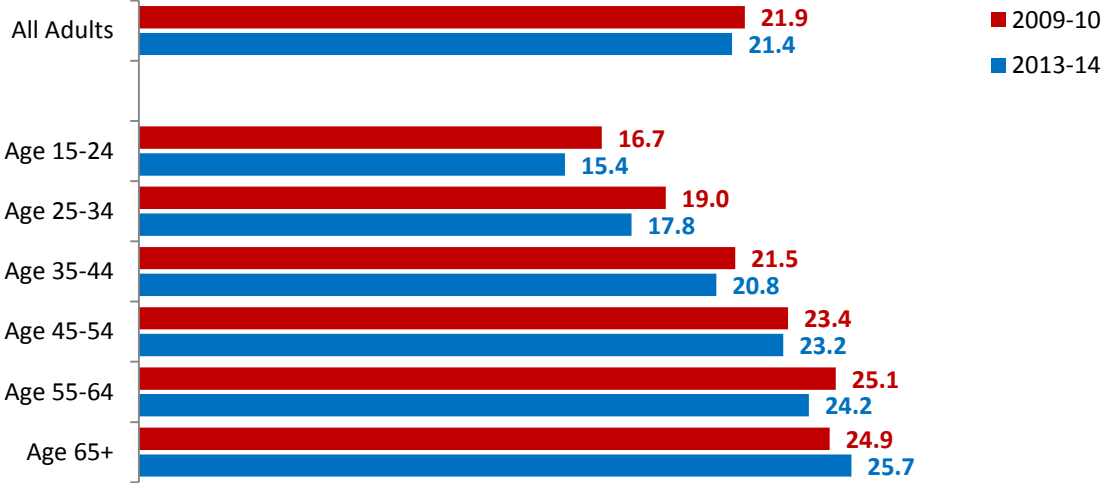
Source: RAJAR, all adults aged 15+

Hours per listener

The amount of time people spend listening to the radio each week has declined slightly over the last five years, down from 21.9 hours in 2009/0 to 21.4 in 2013/14. In the longer term, hours are down further, from an average 24.3 per week in 2003-04.

By age, hours are now much lower among younger audiences, having fallen by around 8% since 2009/10 (from 16.7 to 15.4 hours per week), and are down by 28% since 2003/04. See Figure 4.

Figure 4: All radio hours per listener by age, 2009/10 & 2013/14



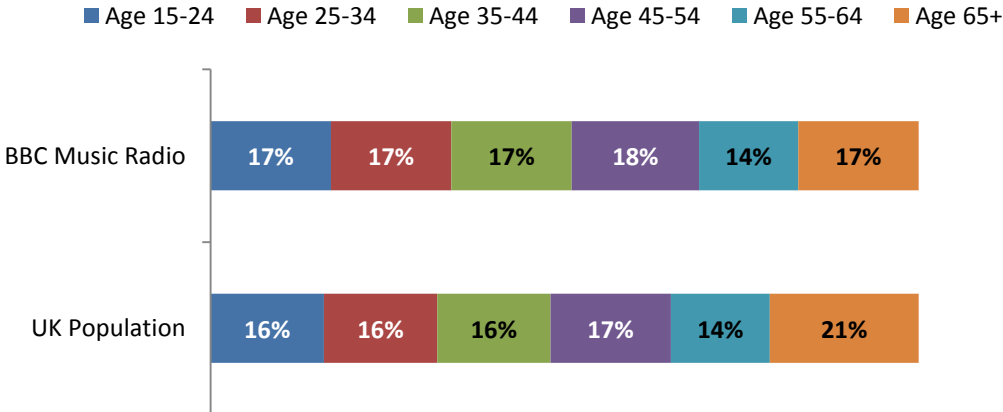
Source: RAJAR

This decline has been mirrored in hours of listening to BBC Radio, with the average amount of time spent with BBC radio at 15.7 hours per listener each week in 2013/14, down from 16.4 in 2009/10. The amount of time spent each week listening to the BBC’s music radio offer has also declined, down from 11.9 hours per listener in 2009/10 to 11.1 hours in 2013/14.

Audience Profile

The age profile of listeners to the BBC music radio stations is just slightly younger than the profile of the UK’s adult population. Under 55 year olds make up 69% of listeners to the music radio stations, compared with 65% of the adult population, as shown in Figure 5.

Figure 5: Age profile of BBC music radio audience vs. UK population, 2013-14



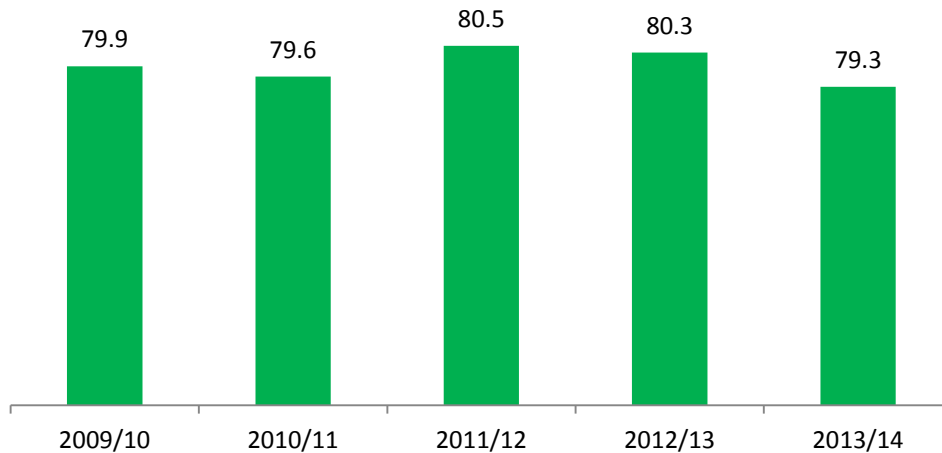
Source: RAJAR

When looking by gender and nation, the profile is also similar to the UK average. By ethnicity, black, Asian and minority ethnic (BAME) listeners account for a slightly lower proportion of listeners than the UK average (at 8.5% compared with the population average of 12.2%).

Quality

Audience perceptions of the quality of the BBC's radio stations are high. The majority (64%) of listeners to the BBC's music radio stations are 'high approvers' of the services¹, and the audience appreciation index (AI) score is high, at an average of 79.3 in 2013-14, although it has fallen slightly since it peaked in 2011/12, as shown in Figure 6.

Figure 6: Average Appreciation Index (AI) of BBC music radio, 2009/10 to 2013/14



Source: BBC Pulse Survey, adults aged 16+. Note AI scores have been collected for 1Xtra, 6 Music and Asian Network from November 2010.

2) Radio 1

Reach

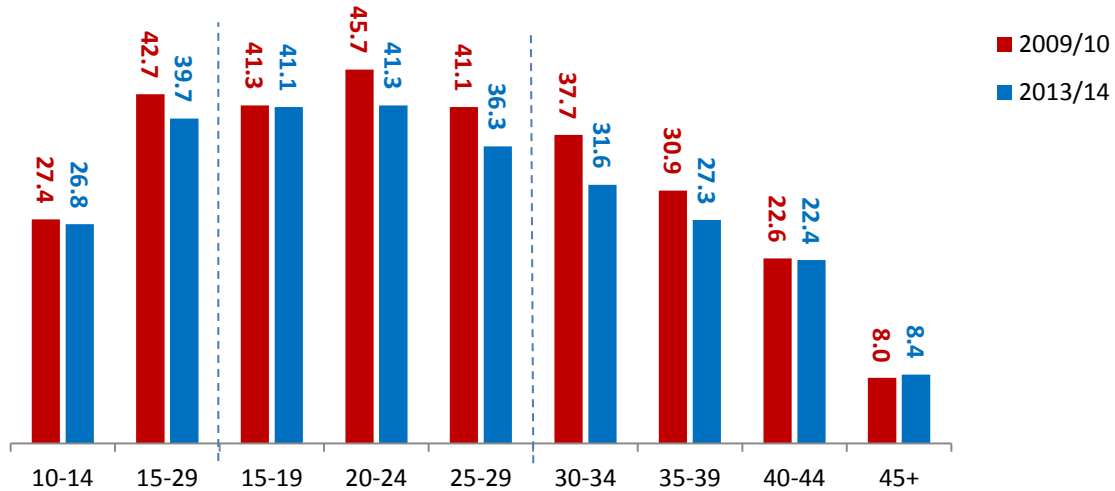
In 2013-14 Radio 1 was listened to by around 11 million people each week (or 20.7% of all individuals aged 10+), this has fallen slightly in the last few years, down from 22.3% in 2009/10.

Reach is high among the target audience of 15-29 year olds, as 40% listen each week, although this has declined slightly in the last few years, from 43% in 2009/10, and in the longer term it has fallen slightly further.

Radio 1's decline in reach among 15-29 year olds since 2009-10 has mainly come from older listeners within the target age range. Reach has remained stable among 15-19s, and has fallen among 20-24 year olds and 25-29 year olds. Reach has also fallen among over 30s, as shown in Figure 7.

¹ Source: BBC Accountability and Reputation Tracker, all adults who had listened to the services in the last seven days, 2013/14. High approvers are those rating the service 8 or more out of 10 for their general impression.

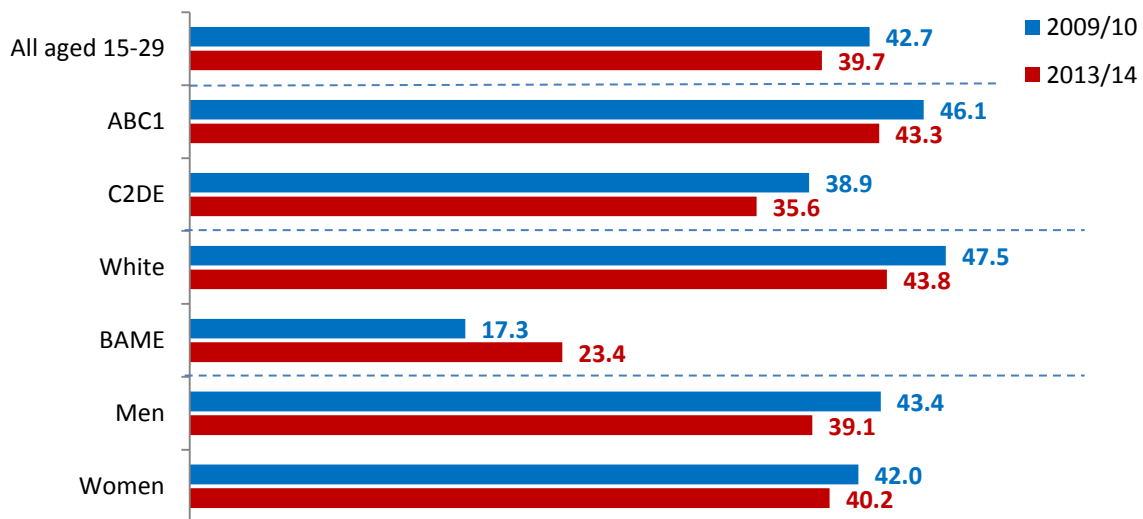
Figure 7: Radio 1 reach (%) by age, 2009-10 & 2013-14



Source: RAJAR 2009-10 and 2013-14

Among its target audience of 15-29 year olds, reach has increased among black, Asian and minority ethnic (BAME) audiences, it remains lower than average, reaching 23.4% each week in 2013-14, as shown below.

Figure 8: Radio 1 reach among 15-29 year olds (%) by other demographic, 2009-10 & 2013-14



Source: RAJAR

Audience Profile

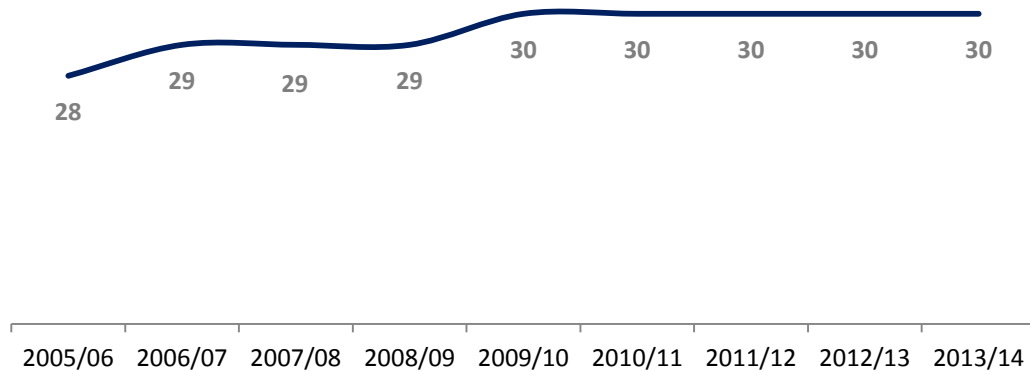
The audience profile of Radio 1 listeners is slightly more female than male, while 58% of the audience is ABC1 (vs. the population average of 55%) and 90% of the audience is white.

The proportion of the audience within the target age range of 15-29 is 41.2%, compared with the population average of 21.5%. A further 8% of listeners are aged 10-14.

Median age

The median age of listener to Radio 1 had been slowly increasing from 2005/06 until 2009/10. Since then it has remained stable, at 30, as illustrated in Figure 9.

Figure 9: Radio 1's median age of listener, 2005/06 to 2013/14



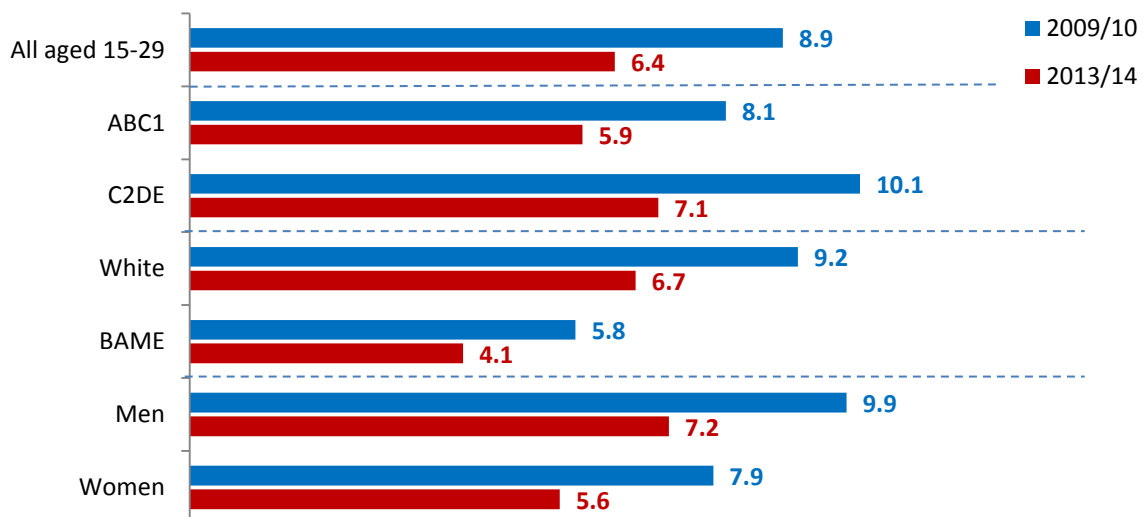
Source: RAJAR, all individuals aged 10+

Hours per listener

The amount of time listeners are spending with Radio 1 has fallen. Overall hours per listener are down from 8.5 hours per week in 2009/10 to 6.2 in 2013/14.

This decline is reflected in listening among the target audience of 15-29 year olds, with hours down from 8.9 to 6.4 hours per week. Among 15-29s, hours are lower among BAME listeners, with an average 4.1 hours per week in 2013/14. Hours are also slightly lower among women and ABC1 listeners, as shown in Figure 10.

Figure 10: Radio 1 weekly hours per listener among 15-29 year olds, 2009-10 & 2013-14

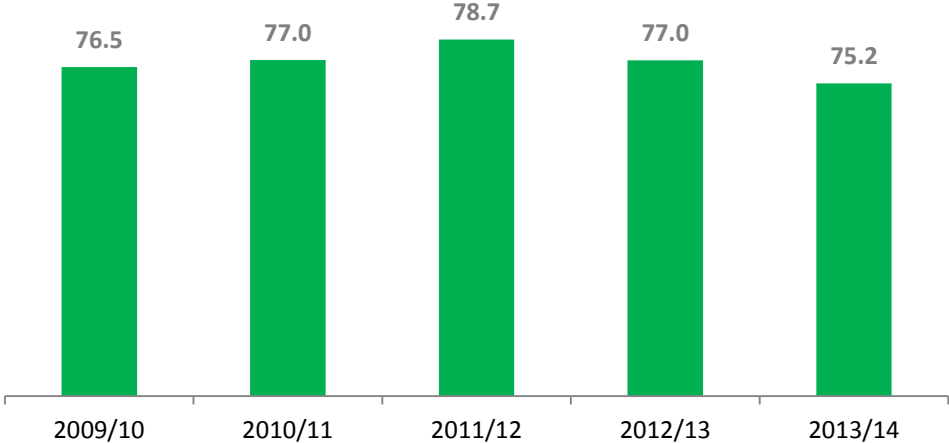


Source: RAJAR

Quality

Audience perceptions of quality of Radio 1 are fairly high. The majority (53%) of listeners are high approvers of the service, although this has fallen slightly over the last few years². The station’s average audience appreciation index (AI) score has also fallen over the last few years, down from an average 78.7 in 2011-12, to 75.2 in 2013-14, as shown in [Figure 11](#).

Figure 11: Radio 1’s average AI score, 2009/10 to 2013/14



Source: BBC Pulse Survey, adults aged 16+

By demographic, Radio 1’s AI score is lower among older, ABC1 and BAME audiences, and is slightly lower among women, as shown in [Figure 12](#). While the AI is much lower among older audiences, they make up a much smaller proportion of the overall sample, due to their much lower reach.

Figure 12: Radio 1’s average AI score by demographic, 2013/14



Source: BBC Pulse Survey, all adults aged 16+

² Source: BBC Accountability and Reputation Tracker, adults 16+ who had listened in the last seven days. ‘High approvers’ are those rating 8 or more out of 10 for general impression.

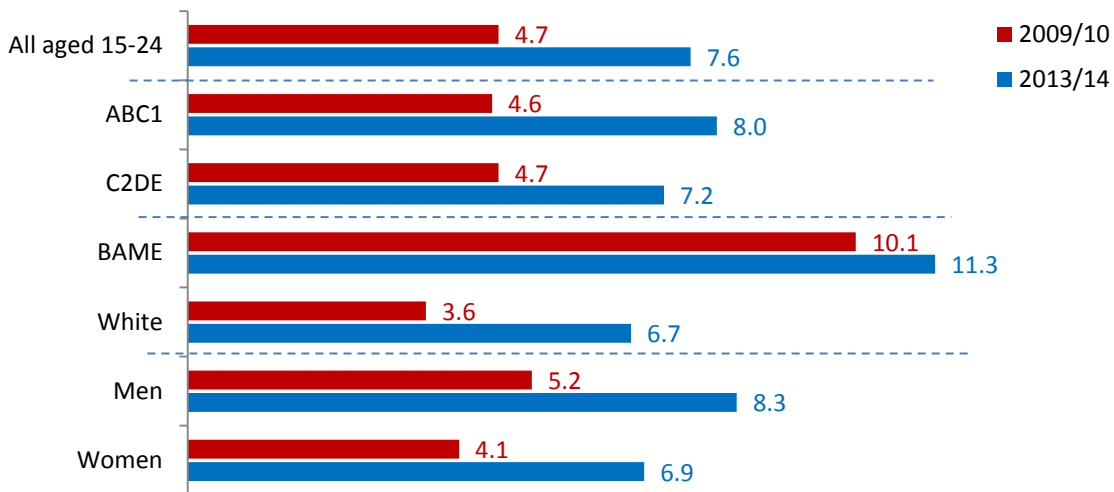
3) 1Xtra

Reach

Reach of 1Xtra has increased significantly over the last few years. In 2013-14 it was listened to by more than 1 million adults each week, or 2.1% of all UK adults, up from 1.2% (or 643,000) in 2009/10.

1Xtra has a service licence remit to appeal to 15-24 year olds, particularly, although not exclusively, from ethnic minorities. In 2013/14 1Xtra reached 7.6% of 15-24 year-olds each week, up from 4.7% in 2009/10. Within the target audience, reach is higher among BAME audiences, reaching 11.3% each week, although over the last few years there has been strong growth in reach among white audiences, as shown in Figure 13.

Figure 13: 1Xtra reach (%) among 15-24s by demographic, 2009/10 & 2013/14



Source: RAJAR

Hours per listener

Weekly hours per listener among 15-24s have declined from 5.6 hours in 2009/10 to around 4.5 hours in 2013/14. The decline has been fairly even across different demographics although the most significant drop has been among the BAME audience (down 2.7 hours since 2009/10).

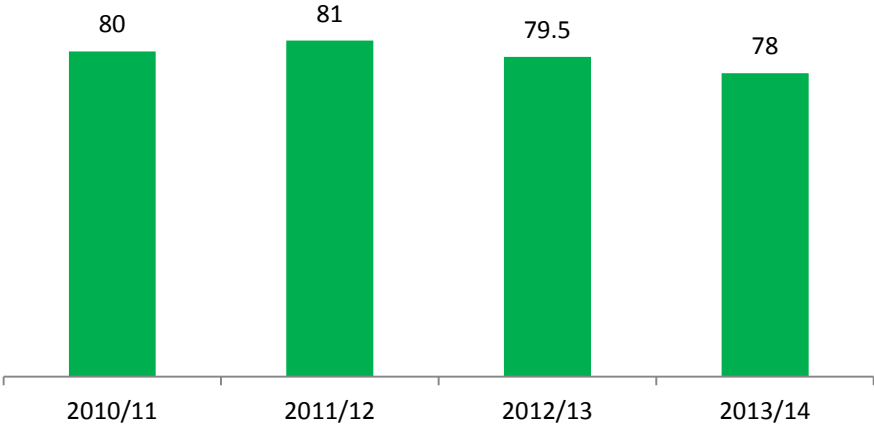
Audience Profile

1Xtra's audience profile is young: the median age of listeners is 24, and 15-24 year olds make up 56% of the total audience. The audience is slightly more male (55%) than female and evenly split between ABC1 and C2DE. While reach is higher among BAME audiences, white listeners make up 69% of the 1Xtra audience, although this is significantly lower than the proportion of the UK population (of 88%).

Quality

Audience perceptions of quality of 1Xtra are high. Some 84% of listeners are 'high approvers' of the station, higher than any of the BBC's music radio stations³. The station achieved an average audience appreciation index (AI) score of 78.1 in 2013-14, although this has fallen slightly, from 81 in 2011-12, as shown in Figure 14. The AI score is highest among younger and BAME audiences.

Figure 14: 1Xtra's average AI score, 2010/11 to 2013/14



Source: BBC Pulse Survey, adults aged 16+. Note 2010/11 data is based on November 2011 onwards.

4) Radio 2

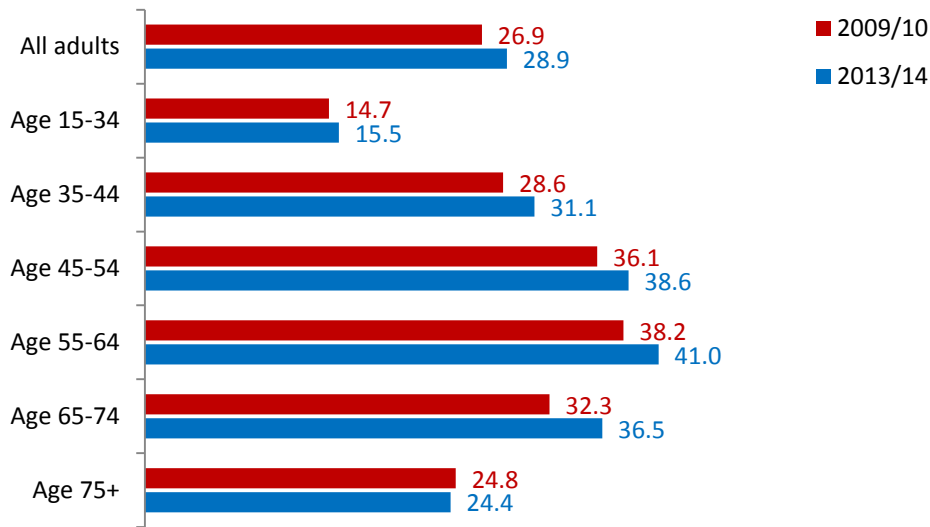
Reach

Listening to Radio 2 has increased in the last few years. The station now reaches 15.6 million adults each week, equating to 29% of all UK adults, up from 27% in 2009/10.

Radio has a target audience of adults aged 35+. In 2013/14 it was listened to by 35% of all over 35s each week, up from 32% in 2009/10. By age, reach is highest among adults aged 55-64, with reach of 41%. Since 2009/10 reach has increased most among 65-74 year olds, now listened to by 37% each week, as shown in Figure 15.

³ Source: BBC Accountability and Reputation Tracker, adults 16+ who had listened in the last seven days, 2013/14. 'High approvers' are those rating 8 or more out of 10 for general impression.

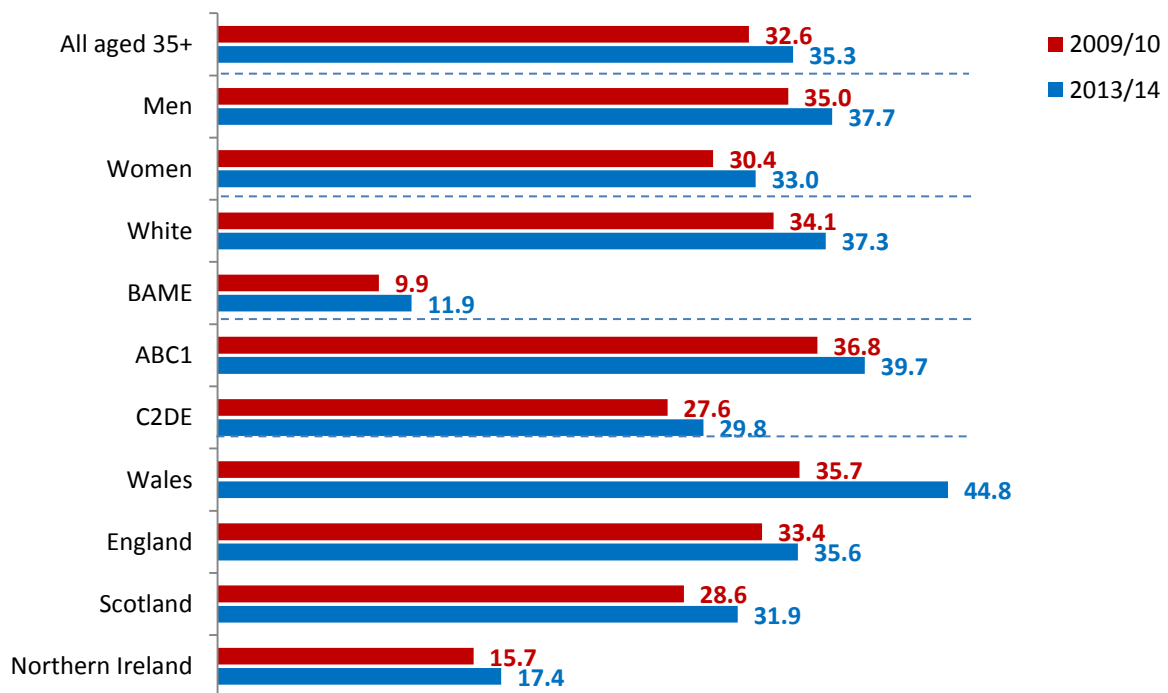
Figure 15: Radio 2's reach (%) by age, 2010/11 & 2013/14



Source: RAJAR

Among over 35 year olds, reach is considerably lower among BAME audiences, reaching 12% each week. Reach is also slightly lower among women and C2DE audiences. By nation, reach is significantly lower among adults in Northern Ireland, at less than half of the UK average. However, as noted on page 4, this should be taken in the context of very strong performance of BBC Radio Ulster/Foyle, which is listened to by 45% of over 35s in Northern Ireland each week.

Figure 16: Radio 2 reach (%) among over 35s by demographic, 2009/10 & 2013/14



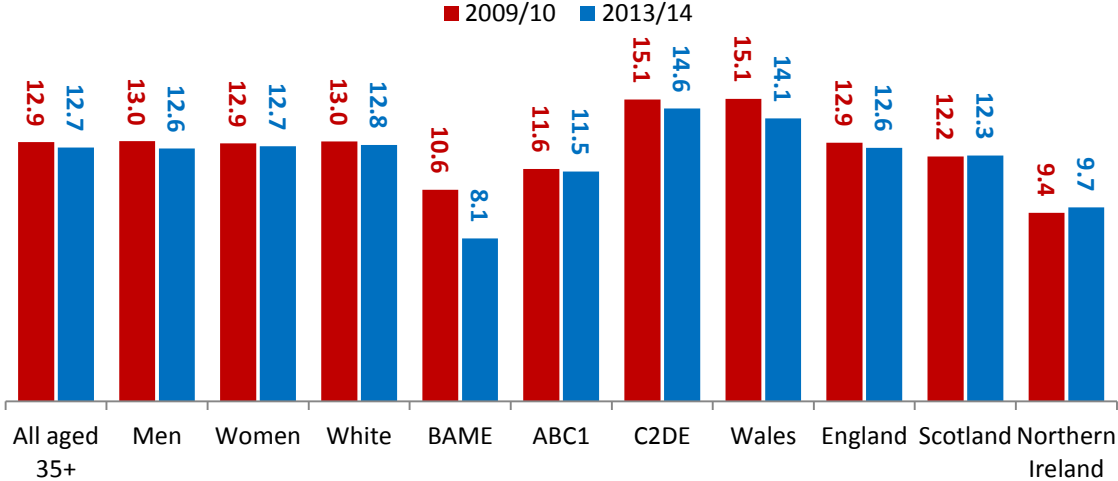
Source: RAJAR

Hours per listener

Hours per listener for Radio 2 are the highest of any BBC station. The average listener tuned in for 11.7 hours per week in 2013/14, and this has been broadly stable over the last five years.

By demographic, among over 35s, C2DE listeners spend longer listening (with an average 14.6 hours), although this has declined slightly from 15.1 in 2009/10. Hours per listener are also significantly lower among BAME audiences, and have fallen slightly since 2009/10, as shown in Figure 17.

Figure 17: Radio 2 hours per listener among over 35s, 2009/10 & 2013/14



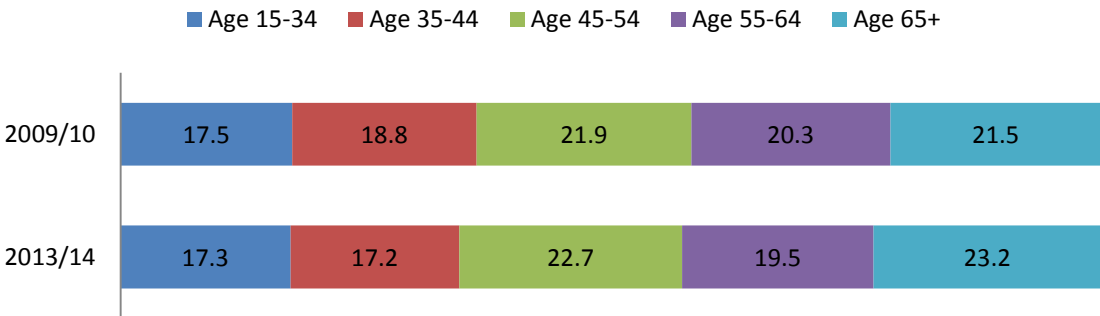
Source: RAJAR

Audience profile

The audience profile of the station is slightly more male (accounting for 52% of listeners) than female, and primarily ABC1 (accounting for 63%, compared with the population average of 55%).

By age, the station’s target audience of over 35 year olds account for 83% of the total audience, and this has remained stable since 2009/10. The proportion of the audience aged over 65 however has increased slightly, to account for 23% of listeners, as shown in Figure 18. Since 2009/10 the median age of Radio 2 listeners has remained stable, at 51.

Figure 18: Radio 2 audience age profile, 2009/10 & 2013/14

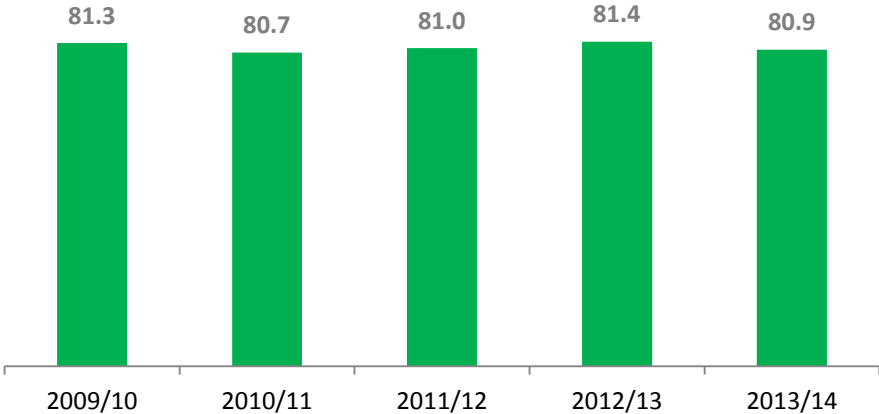


Source: RAJAR

Quality

Audience perceptions of the quality of the station are high. More than two thirds (69%) of Radio 2 listeners are 'high approvers' of the service⁴, and the AI score is high, with an average score of 81 in 2013-14. Of the BBC's music stations, this is behind only 6 Music and Radio 3 and has remained broadly stable over the last five years, as shown in Figure 19.

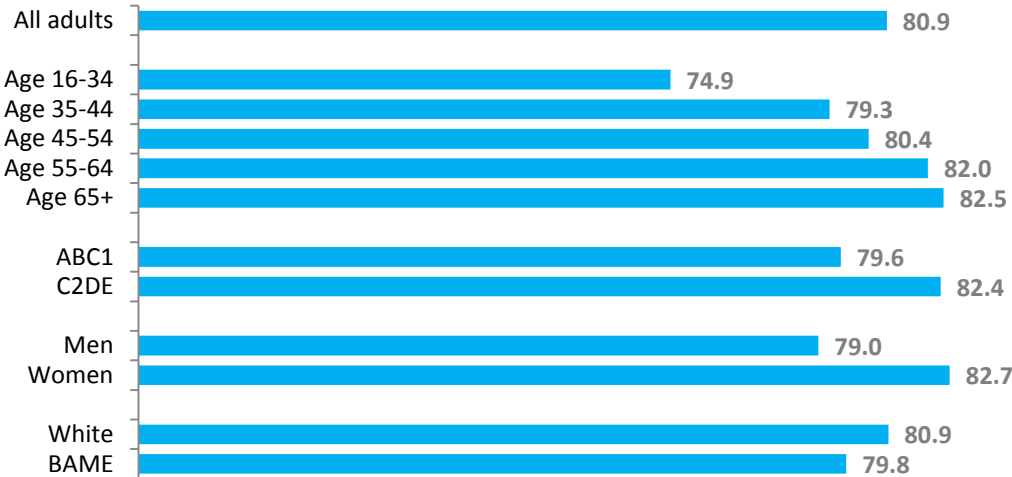
Figure 19: Radio 2 AI scores, 2009/10 to 2013/14



Source: BBC Pulse Survey, adults aged 16+

By demographic, Radio 2's average AI score is lower among 16-34s, and increases gradually with age for all groups over 35. The AI score is slightly higher among C2DE audiences, women and white audiences, as shown in Figure 20.

Figure 20: Radio 2 AI scores by demographic, 2013/14



Source: BBC Pulse Survey, all adults aged 16+

5) 6 Music

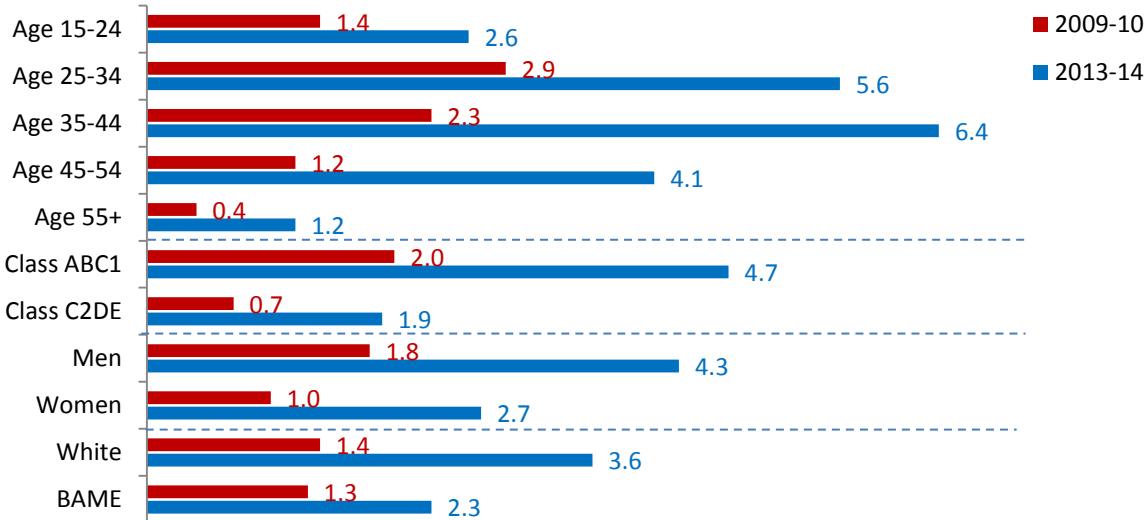
Reach

⁴ Source: BBC Accountability and Reputation Tracker, adults 16+ who had listened in the last seven days, 2013/14. 'High approvers' are those rating 8 or more out of 10 for general impression.

6 Music is the highest reaching digital station in the UK, and its reach has grown significantly over the last five years. In 2013/14 the station was listened to by 1.8 million people each week (or 3.5% of all UK adults). By the end of 2014 reach had increased further, listened to by more than 2 million adults each week.

The increase in 6 Music’s reach has come from all age groups and demographics, although it remains higher among some demographic groups. Reach is higher among 25-44 year olds and among ABC1 listeners, men and white listeners, as shown in Figure 21.

Figure 21: 6 Music % reach by demographic 2009/10 & 2013/14



Source: RAJAR

Hours per listener

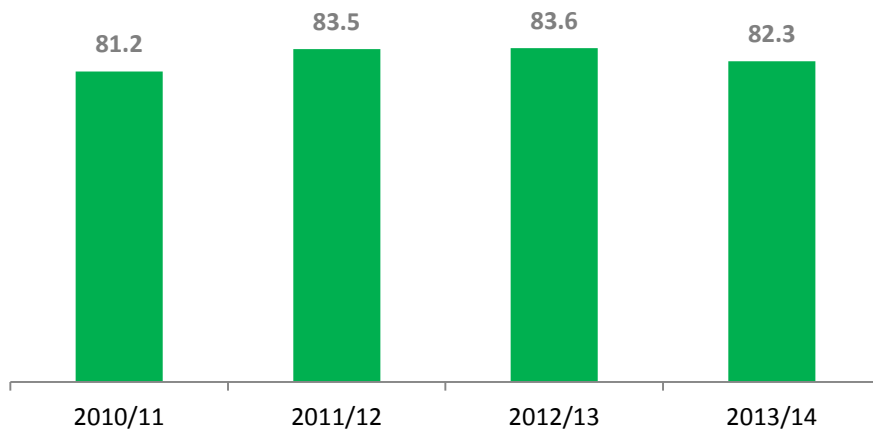
6 Music has the highest hours per listener of any digital radio station, and this has increased significantly in the last five years. In 2013/14 the average listener tuned in for almost 9 hours per week, up from around 6 hours in 2009/10.

Quality

Audience perceptions of 6 Music are very high. Some 83% of listeners are ‘high approvers’ of the station, and this has increased slightly in the last few years⁵. The audience appreciation index (AI) score is highest of any of the BBC’s music radio stations, with an average of 82.3 in 2013-14.

⁵ Source: BBC Accountability and Reputation Tracker, adults 16+ who had listened in the last seven days. ‘High approvers’ are those rating 8 or more out of 10 for general impression.

Figure 22: 6 Music AI scores 2010/11 to 2013/14

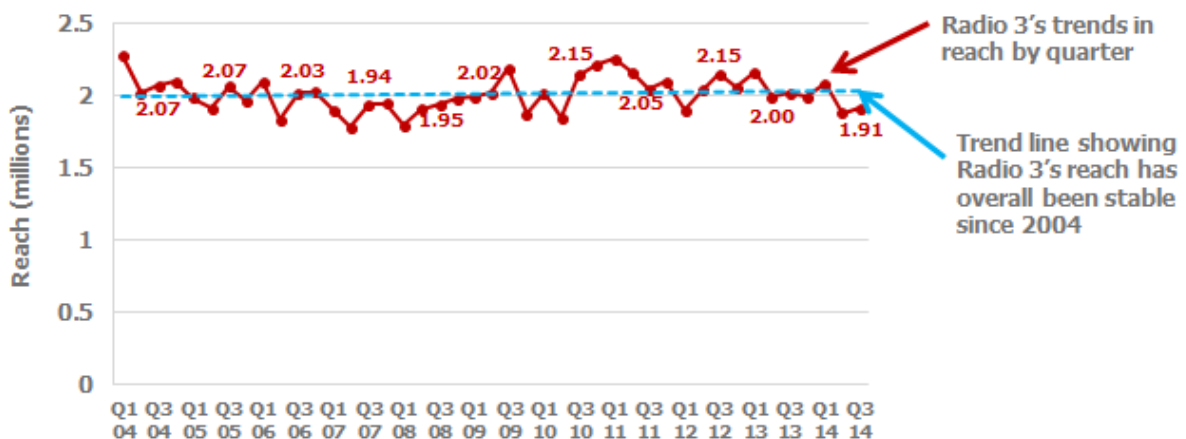


Source: BBC Pulse Survey, all adults aged 16+. Note 2010/11 data is based on November 2011 onwards.

6) Radio 3

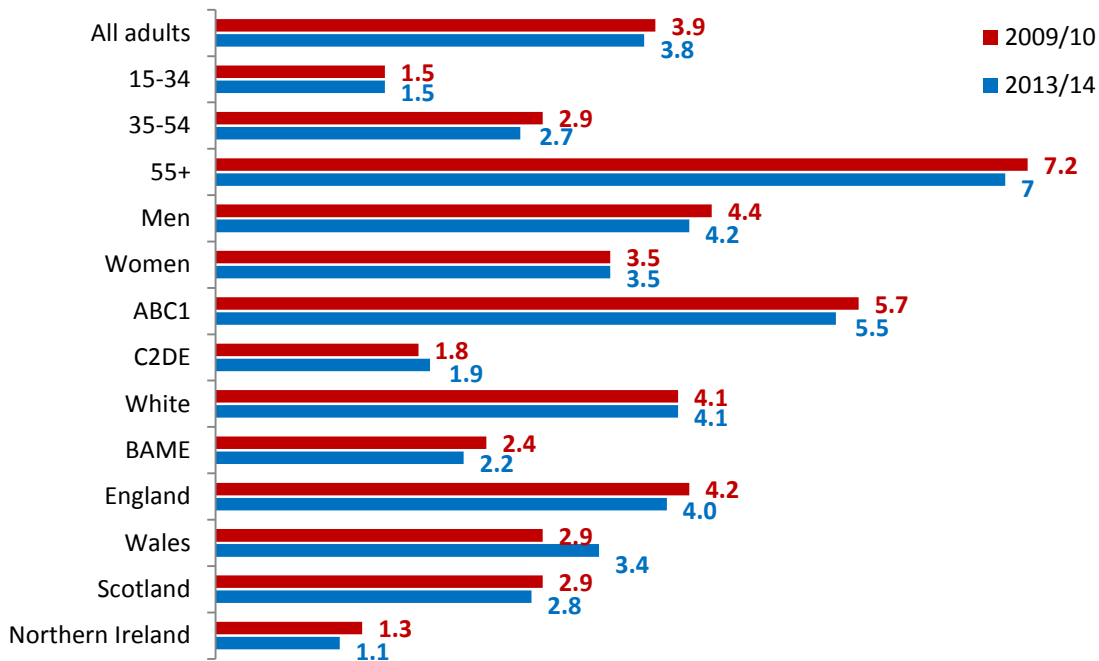
Radio 3's reach has broadly stable over the last ten years, as around 2 million adults listen each week. While there are some fluctuations in reach on a quarterly basis, on an annual basis, reach has been broadly stable since 2004. See Figure 23.

Figure 23: Radio 3 trends in reach (millions), Q1 2004 to Q3 2014



By demographic, reach of Radio 3 is highest among older, ABC1, and white audiences, and audiences in the South of England. In the last five years, reach has fallen among listeners aged 35-54, down from 2.9% to 2.7%, and in the longer term have fallen from 3.9% in 2003/04. These disparities among other demographic groups have remained broadly stable since 2009/10, as shown in Figure 24.

Figure 24: Radio 3 reach (%) by demographic, 2009/10 & 2013/14



Source: RAJAR

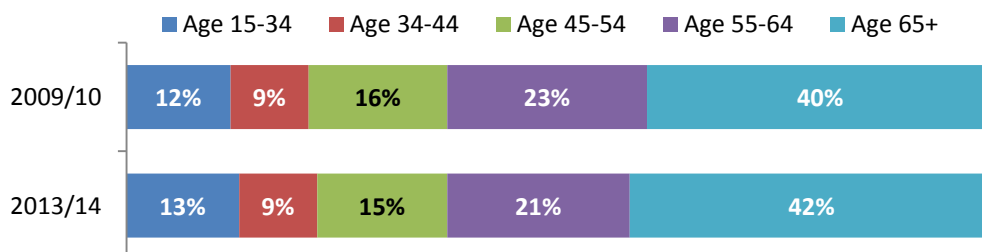
Hours per listener

In 2013-14 the average Radio 3 listener tuned in for 6.1 hours of the station per week, and this has been broadly stable over the last five years. While this is lower than some of the other BBC stations, this reflects Radio 3's high overlap in listeners with other BBC stations, as 73% of its audience also listen to Radio 4.

Audience profile

Radio 3's audience is significantly weighted towards older, ABC1 listeners. ABC1 audiences account for 78% of listeners (vs. the population average of 55%), a figure which is broadly stable since 2009/10. As shown below 42% of the audience is over 65 and this has proportion has increased slightly over the last few years.

Figure 25: Radio 3 audience profile by age, 2009/10 & 2013/14

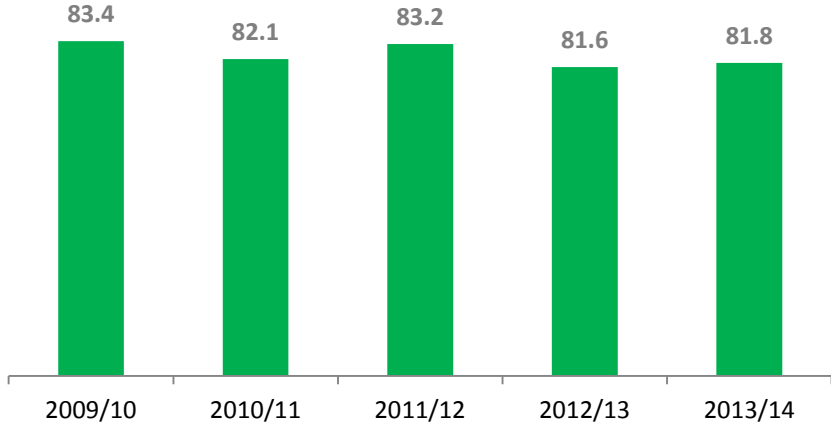


Source: RAJAR

Quality

The audiences' perceptions of quality of Radio 3 are high. Some 62% of listeners are 'high approvers' of the service⁶. The average AI is second highest of all of the BBC's network radio stations, at an average 81.9 in 2013-14, although this has fallen slightly since 2009/10, as shown below.

Figure 26: Radio 3 average AI scores, 2009/10 to 2013/14

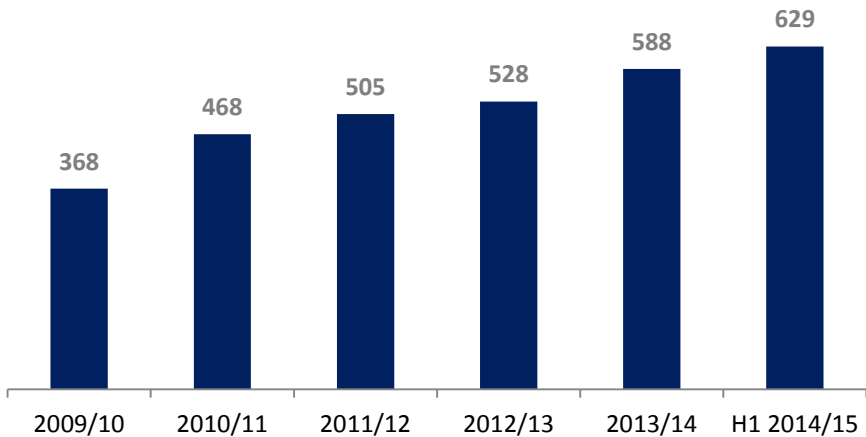


Source: BBC Pulse Survey, adults aged 16+

7) Asian Network

In the last five years Asian Network's audience has increased significantly. Reach has grown from 368,000 in 2009/10 to 588,000 in 2013-14. Since then it has increased further, to reach 629,000 adults each week in the first half of 2014/15, as shown below.

Figure 27: Asian network reach (000s), 2009/10 to H1 2014/15



Source: RAJAR

In line with the station's remit to appeal to British Asians⁷, the station reaches 15.1% of the UK's Asian adults each week, who account for 85% of the total audience. This has increased

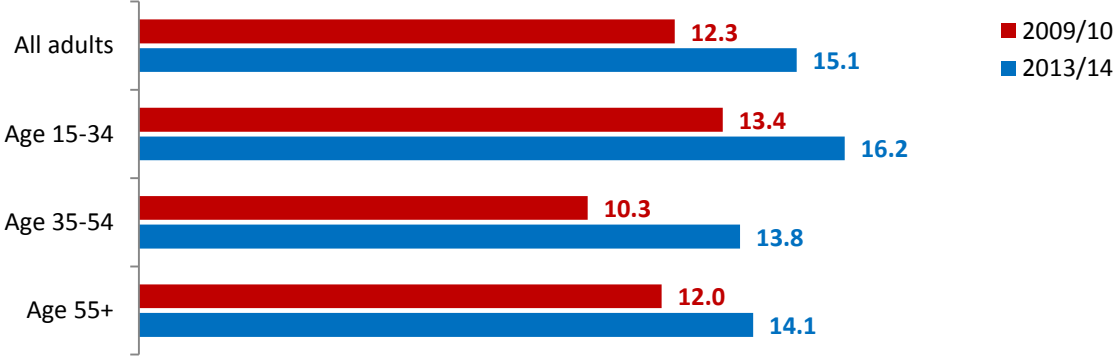
⁶ BBC Accountability and Reputation Tracker, adults 16+ who had listened in the last seven days, 2013/14. 'High approvers' are those rating 8 or more out of 10 for general impression.

⁷ This report refers to British Asians as the primary audience group for the service, meaning the British South Asian community (i.e. listeners primarily with roots in India, Pakistan, Bangladesh and Sri Lanka)

from 2009/10 when it reached 12.3% of UK Asian adults each week, who accounted for 78% of the audience.

Reach is highest among the station’s primary target audience, of British Asians under 35, reaching an average 16% each week, up from 13% in 2009/10, as shown in Figure 28.

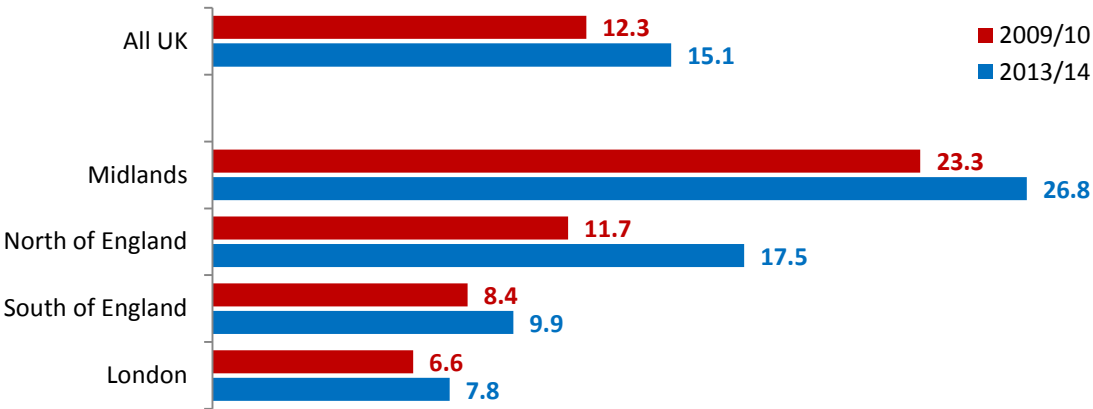
Figure 28: Asian Network reach (%) among Asian audiences by age, 2009/10 & 2013/14



Source: RAJAR

The station’s reach in different areas of the UK show some sizeable differences. Among Asian adults, reach is highest in the Midlands at 27%, while it is lower in London, at 8%.

Figure 29: Asian Network (%) reach among Asian audiences by region 2009/10 to 2013/14

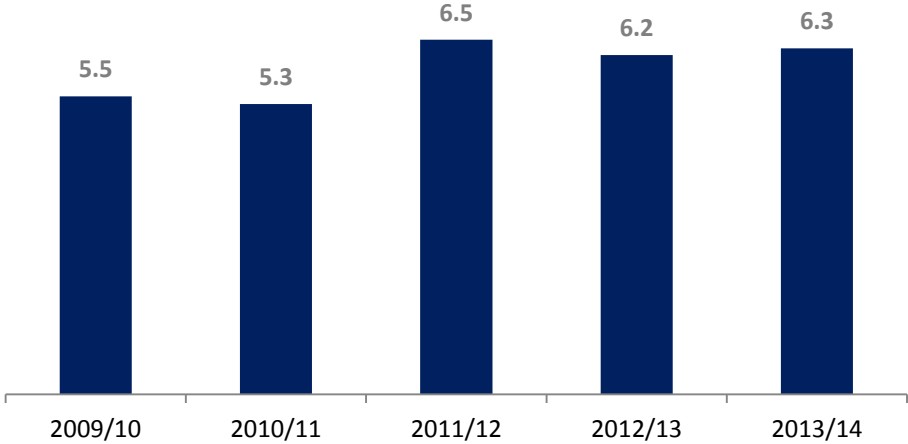


Source: RAJAR.

Hours per listener

The amount of time audiences spend listening to Asian Network each week has remained relatively stable since 2011/12, and has increased by nearly an hour since 2009/10, as shown in Figure 30.

Figure 30: Asian network hours per listener, 2009/10 to 2013/14

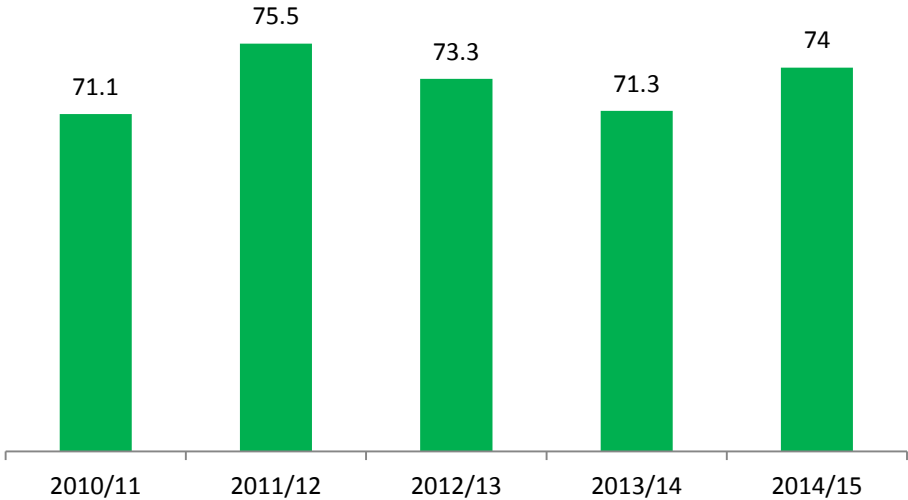


Source: RAJAR

Quality

Perceptions of quality of Asian Network are fairly mixed. While sample sizes are fairly low, the majority (72%) of listeners to Asian Network are 'high approvers' of the station⁸. However, its average audience appreciation index score (AI) has fallen from 75.6 in 2011-12 to 71.3 in 2013-14, although it has risen to 73.7 so far in 2014-15, as shown below.

Figure 31: Asian network AI scores 2010/11 – 2013/14



Source: BBC Pulse Survey, adults 16+. 2014-15 data is based on week 14 2014 to week 9 2015. 2010/11 data is based on November 2011 onwards.

⁸ BBC Accountability and Reputation Tracker, adults 16+ who had listened in the last seven days, 2013/14. 'High approvers' are those rating 8 or more out of 10 for general impression.