BBC Trust Review of BBC Local Radio

Findings of qualitative and quantitative research

Prepared for

BBC Trust
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1 Executive summary

1.1 Introduction

This audience research forms part of the BBC Trust’s Service Review of BBC Local Radio. The aim of the research was to contribute to the measurement of the impact of BBC Local Radio by ascertaining the importance to listeners, and perceived performance of BBC Local Radio, across its Public Purposes. In addition, the opportunity was taken with this research to explore audience views of the BBC’s Delivering Quality First (DQF) proposals for BBC Local Radio which were subject to a public consultation at the time of the research.

The research consisted of a quantitative survey of 1,300 listeners of BBC Local Radio across England, and a series of 14 extended mini-groups in seven locations selected by the BBC Trust as representing a cross section of different types of BBC Local Radio stations - these included BBC Radio Cornwall, BBC Radio Coventry & Warwickshire, BBC Radio Cumbria, BBC Radio Essex, BBC Radio Humberside, BBC Radio London and BBC Radio Nottingham. The fieldwork was conducted in late November and early December, 2011.

1.2 Key findings

1.2.1 Perceptions of BBC Local Radio

In the survey, BBC Local Radio was rated highly in terms of overall listener impressions and quality/impact measures. It also outscored the BBC overall on value for money, and was more likely to be missed than other radio stations.

The qualitative research found that many listeners had a strong emotional attachment to BBC Local Radio, and that its local focus was perceived to be both a core strength and differentiator. In addition, listeners identified the friendly and informal tone, and opportunities provided for listener involvement, as key positives.

However, the qualitative research also showed that younger and more occasional listeners tended to have a more functional, and less engaged, relationship with BBC Local Radio. In addition, some listeners across all age groups expressed a view that the content of Local Radio could be trivial and repetitious at times.

That said, the positives were perceived to considerably outweigh the negatives.

1.2.2 Public Purposes and key areas of focus

Almost all attributes measured in the survey were regarded as important by the majority, and BBC Local Radio was also rated highly in almost all cases. Whilst there were small performance gaps in some areas, these were less numerous and sizeable in this research than have been found in previous reviews of other BBC services.

Key areas of focus explored in greater depth included news, sport, music, art and culture, reflecting the community and listener involvement. Satisfaction was generally high across each of these areas, but listeners could nonetheless suggest some further enhancements. These included:

- For news - being brave enough to tackle controversial local topics and enabling more interaction with local leaders
• For sport – broadening of coverage to include all major national sports as well as all the most popular sports in the specific local areas
• For music – slightly up-weighting music to add variety to a predominantly speech service, and some also suggested including some more modern music into the playlist to appeal more to younger listeners
• For arts and culture - increasing the frequency of alerts about events, and focusing particularly on those which are more under-the-radar or involving emerging local talent
• For reflecting the community - ensuring that the full diversity of the area is represented (including geographic, ethnic and cultural)
• For listener involvement - providing opportunities apart from phone-ins, and taking the opportunity to encourage listeners to get involved in their community as well as the station

In addition, there was a general suggestion made for more cross-promotion of programmes and topics so listeners are made aware of content that might interest them.

1.2.3 DQF Proposals

There was only minority awareness of the DQF proposals at the time of the research. Once informed of the 4 proposed changes to Local Radio, the majority of listeners were not opposed to any of the proposals, although a significant minority (40%) was against the afternoon proposal making it the most contentious.

However, in the open-ended sections of the survey, as well as the qualitative research, there was a considerable strength of feeling expressed by some listeners on these proposals. The main concern related to the potential loss of local identity which was felt to be the raison d’être for BBC Local Radio.

In addition, a sizeable proportion could be more accurately described as taking a ‘wait and see’ attitude than being supportive of the proposals. Thus, their views could have changed in response to external stimulus such as public campaigning.
2 Introduction

2.1 Background

The BBC’s Local Radio service is delivered by a network of 40 stations across England and listened to by an average of 7.2 million people each week.¹ Like all BBC services, BBC Local Radio operates under a service licence which sets out what its remit, key characteristics and specific contribution to public value should be². The remit of BBC Local Radio is to provide a primarily speech-based service to local communities and there is an intentional audience skew towards listeners aged 50 and over who are felt not to be well-served elsewhere. There should be a strong focus from BBC Local Radio on interactivity and audience involvement, and the speech-based content should be complemented by music. Whilst the contribution to public value should be across all of the BBC’s public purposes, there is a particular emphasis on:

- Sustaining citizenship and civil society - by encouraging a shared sense of civic responsibility, hosting discussions on matters of local concern, holding local decision-makers to account and offering listeners opportunities to contribute to the output and take active part in their local communities
- Reflecting UK’s nations, regions and communities - by placing local and community concerns at the centre of the output, and specifically by reflecting local faiths and providing broadcasts of local sports
- Stimulating creativity and cultural excellence - by providing opportunities for new and emerging local talent, and by supporting local arts and music events

The BBC Trust periodically reviews all BBC services against their respective service licences. BBC Local Radio is the latest to undergo such a review. These reviews always follow a similar format which includes a performance assessment that considers four drivers of public value - quality, reach, impact and value for money (the ‘QRIV’ framework). There are a number of separate strands within each review including a public consultation, analysis of existing data and specifically commissioned audience research. For the BBC Trust’s service review of BBC Local Radio, Jigsaw Research was commissioned to conduct the audience research and this report details findings from that particular element of the review.

2.2 Research objectives

The focus of the audience research was primarily to measure the impact of BBC Local Radio. This was done by measuring audience perceptions of how well BBC Local Radio is performing against the BBC’s Public Purposes and associated purpose remits. The research also evaluated the importance of each of these areas to audiences so that performance gaps (areas where importance exceeds perceived performance) could be identified and further explored.

There was also an additional objective for this particular service review which was to explore and assess audience attitudes to a pan-BBC strategy proposal, entitled Delivering Quality First (DQF), which included some proposed changes to Local Radio schedules.

¹ BBC Local Radio Performance Analysis (2010-11 Financial Year)
² BBC Local Radio Service Licence (April 2011)
   http://www.bbc.co.uk/bbctrust/our_work/service_reviews/service_licences/bbc_local_radio.shtml
2.3 Research approach

The audience research was comprised of two stages:

- An initial quantitative stage consisting of a combined online/telephone survey of 1,300 BBC Local Radio listeners throughout England
- A follow-up qualitative stage made up of 14 extended mini-groups in seven locations identified by the BBC Trust as representing a cross-section of different types of BBC Local Radio stations areas

More detail on each of these stages is provided below.

2.3.1 Quantitative stage

A combined telephone and online survey was conducted amongst a total of 1,300 BBC Local Radio listeners (i.e. had listened in the month) aged 15 years and over throughout England. Reflective of internet penetration rates, the online data collection approach was used for listeners who were aged under 65 years whilst those aged 65 and over were interviewed by telephone. The fieldwork took place between 14 November and 1 December, 2011. The average survey length was 19 minutes (for the online element) and 24 minutes (for the telephone survey).

The total sample combined a nationally representative element of BBC Local Radio listeners (n=1,000) and a boost amongst the 7 radio stations as identified in Section 1.1) (n=300). For the nationally representative element, quotas were set (based on RAJAR data) for each of the 40 BBC Radio stations, as well as age within gender and also socio-economic grade for the online sample. For the boost sample at least 75 interviews were conducted with listeners of each of these 7 radio stations. These stations included BBC Radio Cornwall, BBC Radio Coventry & Warwickshire, BBC Radio Cumbria, BBC Radio Essex, BBC Radio Humberside, BBC Radio London and BBC Radio Nottingham.

The following question areas were included in the survey:

- BBC Local Radio listening habits - how often BBC Local Radio was listened to in the last month; on what days of week and at which times of day was it listened to; through which types of devices was it accessed
- General attitudes to BBC and to BBC Local Radio - overall impression; perceived value for money; extent to which it would be missed; perceived quality and impact
- Public Purposes - importance and BBC Local Radio’s perceived performance on a total of 23 attributes which had been specifically tailored to be relevant to Local Radio
- DQF proposals - prompted awareness and un-primed views
- Screening, quota and profiling questions - gender; age; employment status; socio-economic grade; number in household; age of any children; ethnicity; faith; health conditions and disabilities; other BBC and commercial radio stations listened to; household technology (digital TV, internet)

This report covers the main findings with respect to the first four question areas. This includes presentation of the aggregated findings across the whole sample and also identification of statistically significant sub-group differences where they occur. The questionnaire and full sample profile details are included in the Appendix to this report.
2.3.2 Qualitative stage

As mentioned, the qualitative research consisted of 14 extended mini-groups across the 7 radio stations selected by the BBC Trust (2 per station). Each group included 6 people and lasted 2 hours. All respondents were required to complete a pre-task prior to the group which involved capturing their listening behaviour and individual views of BBC Local Radio. The qualitative fieldwork took place between 29 November and 7 December, 2011.

Each group was segmented by age and socio-economic grade. All groups were mixed gender and contained both regular and more occasional listeners. A full sample matrix is included below.

<table>
<thead>
<tr>
<th>Region</th>
<th>BBC Local Radio station</th>
<th>Age</th>
<th>SEG</th>
<th>All listened in last month</th>
<th>Mixed gender</th>
<th>Mix of regular and more occasional listeners</th>
</tr>
</thead>
<tbody>
<tr>
<td>NORTH EAST</td>
<td>BBC Radio Cumbria</td>
<td>65+</td>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BBC Radio Cumbria</td>
<td>45-64</td>
<td>C2DE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EAST YORKSHIRE &amp; LINCOLNSHIRE</td>
<td>BBC Radio Humberside</td>
<td>45-64</td>
<td>C2DE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BBC Radio Humberside</td>
<td>Under 45</td>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WEST MIDLANDS</td>
<td>BBC Radio Coventry &amp; Warwickshire</td>
<td>65+</td>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BBC Radio Coventry &amp; Warwickshire</td>
<td>45-64</td>
<td>C2DE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EAST MIDLANDS</td>
<td>BBC Radio Nottingham</td>
<td>65+</td>
<td>C2DE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BBC Radio Nottingham</td>
<td>45-64</td>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SOUTH WEST</td>
<td>BBC Radio Cornwall</td>
<td>65+</td>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BBC Radio Cornwall</td>
<td>Under 45</td>
<td>C2DE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EAST</td>
<td>BBC Radio Essex</td>
<td>65+</td>
<td>C2DE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BBC Radio Essex</td>
<td>Under 45</td>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LONDON</td>
<td>BBC Radio London</td>
<td>Under 45</td>
<td>C2DE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BBC Radio London</td>
<td>45-64</td>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The qualitative research enabled a greater exploration of performance gaps from the survey as well as important areas of focus for Local Radio as set out in the service licence. In addition, there were some issues of interest which were more qualitative in nature (such as the meaning of localism and emotional connection felt to Local Radio) and therefore were included in this stage of the research. The qualitative question areas therefore included:

- Meaning of localism, and what this specifically means for BBC Local Radio
- Emotional connection/relationship of listeners to BBC Local Radio
- Perceived specific strengths and weaknesses of BBC Local Radio, and barriers to listening more for occasional listeners
- Comparison to other radio stations and perceived areas of distinctiveness
• Views on key areas of focus in more detail - news, sport, music, arts and culture, listener participation, reflection of the local community
• Reactions to the DQF proposals including detailed exploration of why views were held

The discussion guide is included in the Appendix to this report.
3 Perceptions of BBC Local Radio

3.1 General metrics

In the survey, respondents were asked about their overall impression of BBC Local Radio and their views as to the value for money that it provides to licence fee payers. They were also asked these questions about the BBC as a whole, which enables a direct comparison to be drawn.

As shown in Chart 1 below, BBC Local Radio was highly regarded by listeners who took part in the survey. BBC Local Radio received an average overall impression rating of 7.6 out of 10, which is on par with how respondents felt about the BBC overall.

Chart 1: Overall impression

In addition, BBC Local Radio was perceived to offer significantly better value for money (58% said ‘very good’ and an additional 31% said ‘fairly good’) than the BBC overall (where only 25% gave a ‘very good’ rating and 48% ‘fairly good’). This is shown in Chart 2 over the page:
C2. The TV licence fee, which pays for all BBC services including television, radio, online content and digital switchover costs £145.50 per
year; please could you tell me the extent to which you feel your household gets value for the licence fee you pay?

F3. Out of the £145.50 licence fee, around £5.97 a year is used to fund a total of 40 BBC Local Radio stations across England. Thinking
specifically about how your licence fee is spent, please tell me whether or not you feel BBC Local Radio is good value for money.

Base: All respondents (n=1300)

For each of these questions, those aged 65 and over and daily listeners were more favourable than average about BBC Local Radio, along with some additional demographic and regional differences (which area shown in Charts 1 and 2).

Listeners were also asked to what extent they would miss BBC Local Radio if it was not there. If they also listened to other BBC and/or commercial radio stations; they were also asked this about the other stations they listen to most. The findings show that BBC Local Radio would be missed by the great majority (72%), slightly ahead of other BBC radio stations (69%) and significantly more likely to be missed compared to commercial stations (54%). Again, those aged 65 and over, and regular (daily or most days) listeners, emerged as groups who would particularly miss BBC Local Radio, along with some regional differences. All of these findings are contained in Chart 3 over the page:
Chart 3: Extent to which radio stations would be missed

In addition, the majority agreed with all four of the statements included in the survey to measure the perceived quality and impact of BBC Local Radio:

- Has programmes I want to listen to (72%)
- Has well made, high quality programmes (71%)
- Has programmes that make me think (62%)
- Has programmes with new ideas and approaches (52%)

However, as can been seen above, whilst the scores for three out of the four attributes showed agreement by clear majorities, only just over 50% agreed that Local Radio delivered on an attribute relating to innovation. Again, the 65 and over age group, and regular listeners, were consistently more favourable. The full findings of this question are shown in Chart 4 over the page.
Chart 4: Quality and impact assessment of BBC Local Radio

<table>
<thead>
<tr>
<th></th>
<th>Definitely agree</th>
<th>Tend to agree</th>
<th>Neither/nor</th>
<th>Tend to disagree</th>
<th>Definitely disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has programmes that I want to listen to</td>
<td>29%</td>
<td>43%</td>
<td>18%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Has well made, high quality programmes</td>
<td>26%</td>
<td>45%</td>
<td>22%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Has programmes that make me think</td>
<td>23%</td>
<td>39%</td>
<td>27%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Has programmes with new ideas and different approaches</td>
<td>17%</td>
<td>35%</td>
<td>35%</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

E3. To what extent do you agree or disagree that [BBC Local Radio station] ...

To provide further detail on what listeners value most about local radio and its perceived points of distinctiveness, respondents in the survey were asked in an open-ended question, what, if anything, their BBC Local Radio station offers that they cannot get from any other radio station. A number of consistent themes emerged:

- Provision of local news and information (particularly traffic)
- Generally high quality presenters and content
- Local community understanding and ‘flavour’
- Phone-ins with ‘real people’
- A friendly and down-to-earth tone
- Specific presenters and programmes which are followed and valued by different listeners
- Coverage of local sports (particularly football)
- The inclusion of some music alongside speech content

A selection of verbatim responses is included below to provide a flavour of reviews expressed:

“It lets me know what is happening in my local area - events, traffic, that sort of thing. It also informs me of places of interest that I might want to visit. And it is vital to me at times of flooding, extreme weather etc.”

Oxford, female, 46 years

“Local presenters talking about local issues, often with a light-hearted touch. Good for news, traffic and weather updates.”

Lancashire, male, 62 years
“Local information which is relevant to me and where I live. Enthusiasm for the county, its places, history and traditions. It makes me feel connected to the place where I live.”

Gloucestershire, female, 51 years

“The local flavour of the news items and discussions - they talk about local matters a lot and hold many debates that are of importance. The quality would be much missed as local commercial stations simply do not focus on this, and the national media is too Southern-biased.”

Leeds, female, 33 years

A strong reliance on BBC Local Radio was also apparent from respondents' listening behaviour. The great majority (72%) listened more than once a week. Whilst most (88%) listened to other radio stations, a significant minority of daily listeners (30%), and the 65 and over age group (27%), only listened to BBC Local Radio and no other radio station. These findings are shown in full in Chart 5 below and Chart 6 over the page.

Chart 5: Frequency of listening to BBC Local Radio in the last month

D1. How often did you listen to [BBC Local Radio station] in the last month?
Base: All respondents (n=1300)
3.2 Detailed impressions

Listeners’ views of BBC Local Radio were covered in greater depth in the qualitative research. The specific aspects that were explored included the emotional connection felt by listeners to Local Radio, the definition and value placed on localism by listeners, and other perceived strengths and weaknesses of Local Radio.

3.2.1 Connection felt by listeners to BBC Local Radio

Using an enabling technique which involved the preparation of a ‘Retirement Speech for Local Radio’, respondents were able to imagine a hypothetical scenario where BBC Local Radio no longer existed and identify what they would miss most about it. The responses indicated that many listeners have a strong emotional connection to BBC Local Radio. This was particularly likely to be the case with older and more regular listeners.

The verbatim comments below are indicative of the sentiments expressed:

“I’ll miss your sense of community, reflecting life in the capital, with an easy listening mix of chat and music. The fact that it often sounds like you are eavesdropping on a private conversation rather than being talked at... The informality, it’s not pompous or arrogant.”

London, 45-64 years

“What will I do without you? I feel that I’ve lost a soulmate. Having listened to you for about 40 years I will miss you enormously. I have loved the jokes, never at anyone’s expense, and all the traffic, weather and news you imparted over the years.”

Essex, 65+ years
“It would be a huge loss for the local community... a loss of identity for the area and a lack of a venue to express your feelings on local issues.

Humberside, 45-64 years

“Radio Cornwall has entertained the people of Cornwall for many years now... For older generations it leaves behind an irreplaceable gap of entertainment and something to focus on. (I'll miss) the various styles of presenters who hollered about our interests and made us smile. But most of all we’ll miss the updates on local weather, travel and school closures.”

Cornwall, under 45 years

Whilst the majority felt a strong emotional connection to BBC Local Radio, there were some more ‘functional’ listeners, as well as some who felt that the station is pitched at others more than them. For example, when asked to ‘imagine BBC Local Radio as a person’, some described it as being relatively old and somewhat dated. In addition, some only listened to BBC Local Radio for a very specific purpose, typically local news and information, and tended to prefer other stations. This group was more likely to be comprised of younger and occasional listeners.

“I thought of it as a bit middle-aged...maybe in their 50s, a bit stuck in their ways, a bit dull. Just from what I've heard and the odd bit of music.”

London, under 45 years

“I think the reason I don’t listen to it more is that I listen for a specific purpose which is for traffic updates and the local news.”

Essex, under 45 years

“I can’t imagine it being of great interest to anyone under the age of 30 to be honest. Men from allotments talking about gardening.”

Nottingham, 45-64 years

3.2.2 Definition and value of localism

The different levels of emotional attachment notwithstanding, BBC Local Radio appears to be valued across-the-board for its local focus.

Respondents in the qualitative research reported that they rely on the local news and information provided by Local Radio, including weather forecasts, updates on roads and travel conditions, and information on school closures resulting from extreme weather.

Local Radio was also felt to make an important contribution in the way it conveys local life. This aspect of localism was felt to include a variety of elements including covering local cultural events and sporting matches, reporting on currently topical local issues, providing a historical perspective, and even publicising the positive contribution to the community of local charities, and other groups and individuals.

In addition, Local Radio was valued for being a conduit for expressing the views of local people. Respondents felt that the presenters on Local Radio were themselves often local people with good local knowledge. They also particularly appreciated hearing from other listeners like themselves in the phone-ins. In addition, there was a specific reference to hearing local accents on Local Radio and the contribution that this makes to a localised feel.
Ultimately, BBC Local Radio was perceived both to reflect and contribute to a sense of community and belonging, as the quotes below indicate:

“It’s nice to hear what’s going on around us and not 300 miles up the road, so that’s why I listen to it.”

Cornwall, under 45 years

“Obviously, the up-to-the-minute updates which even include local roads... There are also a few stories on old Essex history which I quite enjoy.”

Essex, under 45 years

“I think we presume that (the presenters) live in our county; that we might bump into them shopping and they’re personable and you could talk to them.”

Nottingham, 65+ years

“It’s a sort of local bulletin board really... And some of the presenters actually help people don’t they? ...Champion things and also charities.”

Coventry, 45-64 years

“I like the banter. It’s like local people just talking, telling you things like ‘I heard about this restaurant or I heard about that theatre or about this fair going on’... they just talk about what’s going on in London.”

London, 45-64 years

3.2.3 Additional perceived strengths of BBC Local Radio

There were also perceived to be a number of other associated strengths of BBC Local Radio. For example, the perceived quality of specific presenters and programmes was often referred to by respondents.

More generally, there were references to Local Radio having a generally friendly and informal tone which listeners appreciated.

“They seem more friendly and welcoming, and basically they are like friends chatting with you... Just a warm, knowledgeable friend really.”

London, under 45 years

“I think they’re on our level more, they’re not snooty.”

Coventry, 45-64 years

It was also universally felt that the opportunities provided for listener involvement are unique and, for many, this feature added to the emotional connection felt towards Local Radio.

“I think the participation in the programmes is really, really great because it is so diverse and unpredictable where it’s going to take you.”

London, 45-64 years

Another plus for some listeners is the inclusion of some music content as it was felt that this adds variety to a predominantly speech-based service. In addition, some older listeners mentioned the style of music played on BBC Local Radio as a positive, as they felt it is suited to
their age range and provides a sense of nostalgia which they valued. (However, for others the music content was either not a reason for listening or, for a minority, alienating. See Section 4.3.3 for more detail.)

“It manages to straddle the music and talk really well. And mature music, not like hits and party all day long which certain stations drive you mad on.”

London, 45-64 years

3.2.4 Perceived areas for improvement for BBC Local Radio

Conversely, despite the largely positive responses, there were some areas in which it was felt that BBC Local Radio had scope for improvement.

For example, whilst the light-natured and irreverent nature of the content on Local Radio was appreciated, it was also felt by many that the balance could sometimes tip over to being too trivial or banal. Some also felt that this could be at the expense of more important stories which they felt were under-represented. A number of examples of this were cited by respondents:

“Talking about toppings on a bacon sandwich, how many phone-ins can you have on that? Especially when you consider some of the critical things happening here at the moment; the hospitals for example.”

Cumbria, 45-64 years

“There’s the sort of chat where the people ring up and seem to be just chattering, filling space. It’s not interesting.”

Cumbria, 65+ years

“When I said ‘tedious’ earlier on, an example was there were some chaps who grew their beards for charity. We were listening to them shave them off.”

Nottingham, 45-64 years

In addition, there was a perception that individual news items are sometimes overplayed in terms of lasting too long or being repeated too often. Respondents felt that it would be preferable to vary the content and introduce new items more regularly.

“Sometimes they repeat themselves too long, don’t they? If they’ve got some subject they’ve started in the morning...you’ll hear it in an hour’s time and then in another half an hour... instead of bringing other subjects in.”

Cornwall, 65+ years

“If they’ve got a talking point it goes on and on and you think ‘... can we talk about something else?’... Last Monday it was care for the elderly...and that was all that was on all day, this one topic of conversation... they beat it to death really.”

Humberside, 45-64 years

Some also suggested that more music be played on BBC Local Radio than at present in order to break up the speech content and add variety. However, even those who felt this agreed that the overall weighting of content should still be clearly towards speech. The style of music on Local
Radio was also off-putting to some listeners who felt that it was too old-fashioned and would benefit from some degree of modernisation.

“It’s nice to have a song now and again, so it doesn’t get boring and it isn’t just talk.”

Coventry, 45-64 years

“You tend to hear a lot of songs that are really strange, that you haven’t heard since you were 10 years old or something.”

Nottingham, 45-64 years

Finally, an opportunity was identified for BBC Local Radio to increase its cross-promotion of programmes in order to ensure that listeners do not miss content of interest. Some listeners suggested more cross-promotion directly. Others indicated this opportunity implicitly by suggesting as their ‘new content ideas’ programmes or slots that were already in existence on BBC Local Radio - e.g. a programme to showcase emerging local talent and a slot for a phone-in surgery with local politicians.

“We said what they could do better was maybe to flag up things that were particularly interesting that were coming later in the day or the next day or whatever. Promote other programmes than their own a bit more often.”

London, 45-64 years
4 Public Purposes

4.1 Introduction

Under the terms of the Royal Charter and Agreement, the BBC’s main activities should be the promotion of six Public Purposes through output consisting of information, education and entertainment. These Public Purposes are:

1. Sustaining citizenship and civil society (also referred to in this report as ‘Citizenship’)
2. Promoting education and learning (also referred to in this report as ‘Education’)
3. Stimulating creativity and cultural excellence (also referred to in this report as ‘Creativity’)
4. Representing the UK, its nations, regions and communities (also referred to in this report as ‘Nations, regions and communities’)
5. Bringing the UK to the world and the world to the UK (also referred to in this report as ‘Global’)
6. In promoting its other purposes, helping to deliver to the public the benefit of emerging communications technologies and services and, in addition, taking a leading role in the switchover to digital television (also referred to in this report as ‘Digital’)

The BBC Trust has set ‘purpose remits’ against each of the Purposes and these enable the Trust to set objective, transparent, published criteria against which they will judge the BBC’s performance. Broadly, the purpose remits explain how the BBC should fulfil its six public purposes. More specifically, the remits set priorities for the BBC in consultation with licence fee payers and show how the BBC Trust will judge performance against those priorities using measures based on audience perceptions.

In every service review, statements are developed in order to measure the audience perceptions of the BBC’s performance against each Public Purpose and its associated purpose remits. For this research of BBC Local Radio, a total of 23 statements were specially adapted and tailored to ensure they were relevant to Local Radio. This was a collaborative process between Jigsaw Research and the BBC Trust. The final list of statements is included below:

<table>
<thead>
<tr>
<th>Public Purpose</th>
<th>Attribute for BBC Local Radio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustaining citizenship and civic society</td>
<td>1. Provides high quality journalism</td>
</tr>
<tr>
<td></td>
<td>2. I trust it to provide impartial news</td>
</tr>
<tr>
<td></td>
<td>3. Helps me understand politics and decision-making in my local area</td>
</tr>
<tr>
<td></td>
<td>4. I turn to when I need information about a major local issue or crisis</td>
</tr>
<tr>
<td></td>
<td>5. Gives me a better understanding of UK-wide news and topical issues</td>
</tr>
<tr>
<td></td>
<td>6. Gives me a better understanding of news and topical issues in my local area</td>
</tr>
<tr>
<td></td>
<td>7. Provides opportunities to share my own views</td>
</tr>
<tr>
<td></td>
<td>8. Provides opportunities to hear other listeners’ views</td>
</tr>
</tbody>
</table>
Promoting education and learning
9. I have learned new things whilst listening to its programmes
10. Highlights to me important social issues
11. Supports local charities and social causes

Stimulating creativity and cultural excellence
12. Introduces me to new performers, writers and musical artists in my local area
13. Tells me about musical and arts events taking place in my local area
14. Plays music that is relevant to my local area
15. Plays popular music that is relevant to my age group

Representing the UK, its nations, regions and communities
16. Provides programming and content that caters for my local area
17. Helps me feel more involved and interested in my local community
18. Reflects my local issues and concerns
19. Reflects a range of faiths, cultures and communities in my local area
20. Provides coverage of major events and anniversaries that are important to people in my local area
21. Provides coverage of local sporting teams and local sporting events

Bringing the UK to the world and the world to the UK
22. Helps me understand what’s going on in the wider world, such as international news and events

Delivering the benefit of emerging technologies
23. Has helped me to make the most of new technologies such as digital/DAB radio and the internet

During the survey, respondents were first asked to rate BBC Local Radio’s performance on each of the statements above. They were then asked how important each attribute is to them personally. The two rating scales used were as follows:

<table>
<thead>
<tr>
<th>Performance scale</th>
<th>Importance scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completely disagree</td>
<td>Extremely unimportant</td>
</tr>
<tr>
<td>Disagree strongly</td>
<td>Very unimportant</td>
</tr>
<tr>
<td>Disagree slightly</td>
<td>Quite unimportant</td>
</tr>
<tr>
<td>Neither agree nor disagree</td>
<td>Neither important nor unimportant</td>
</tr>
<tr>
<td>Agree slightly</td>
<td>Quite important</td>
</tr>
<tr>
<td>Agree strongly</td>
<td>Very important</td>
</tr>
<tr>
<td>Completely agree</td>
<td>Extremely important</td>
</tr>
</tbody>
</table>

The performance score used in this report is the percentage of users who agreed ‘completely’, ‘strongly’ or ‘slightly’ (score of 5-7 out of 7) with each of the statements concerning BBC Local Radio. The importance score used is the percentage of users who felt each of the statements was ‘extremely’, ‘very’ or ‘quite’ important (also score of 5-7 out of 7).
The performance gap calculation in this report is the difference between the performance and importance scores for each statement. Those statements where claimed importance is notably higher than perceived performance can be regarded as a performance gap.

In addition, as the importance question in the survey just measures stated or ‘claimed’ importance, derived or ‘real’ importance has also been calculated via correlation analysis. The correlation analysis uses overall impressions of BBC Local Radio as the dependant variable and determines the relationship for individual respondents of performance scores across the 23 attributes with their overall impressions of BBC Local Radio. Those attributes which tend to be strongly correlated can be regarded as relatively more important than those where the correlation is less strong.

4.2 Overall importance and performance

Overall, the findings from this part of the survey highlight that almost all statements were both prioritised and highly rated by the majority. With the exception of the digital statement, the statements were regarded as important by between six in ten (for local music and faiths) and almost nine in ten (for local news). A similar range of performance scores for BBC Local Radio were achieved across the attributes. Again with the exception of the digital statement, the lowest performance scores were around six in ten (for local music and talent) and the highest were almost nine in ten (for other listeners’ views and local news).

The reason for the digital statement lagging both in importance and perceived importance was not specifically explored in the qualitative research. However, the survey found that the great majority of local radio listeners were accessing it on analogue radio (79%), whereas the use of other technologies was relatively low (27% for DAB digital radio, 9% for internet, 8% for digital TV and 4% for mobiles).

Another feature of this research was how closely aligned each individual attribute tended to be in terms of the importance and performance scores. Therefore, unlike some other service reviews, there were no large performance gaps found. The relatively largest gaps for BBC Local Radio were found for the following statements:

- Provides high quality journalism (-6)
- Helps me understand politics and local decision making (-5)
- Turn to for information on major local issues (-5)
- Plays music relevant to my age group (-4)
- Reflects my local issues and concerns (-4)

All importance and performance scores are summarised in the Chart 7 over the page:
Chart 7: Performance gaps

Performance is top bar (completely, strongly and slightly agree), Importance is bottom bar (extremely, very and quite important)

Gap between performance and importance

<table>
<thead>
<tr>
<th>Statement</th>
<th>Performance</th>
<th>Importance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides opportunities to hear other listeners’...</td>
<td>67%</td>
<td>76%</td>
<td>+11</td>
</tr>
<tr>
<td>Gives me a better understanding of local news...</td>
<td>65%</td>
<td>86%</td>
<td>+21</td>
</tr>
<tr>
<td>Provides coverage of local sport</td>
<td>83%</td>
<td>81%</td>
<td>-2</td>
</tr>
<tr>
<td>Provides programming &amp; content catering to...</td>
<td>83%</td>
<td>81%</td>
<td>-2</td>
</tr>
<tr>
<td>Provides coverage of major events important...</td>
<td>81%</td>
<td>67%</td>
<td>-14</td>
</tr>
<tr>
<td>Tells me about local musical &amp; arts events</td>
<td>81%</td>
<td>74%</td>
<td>-7</td>
</tr>
<tr>
<td>Trusted to provide impartial news</td>
<td>80%</td>
<td>68%</td>
<td>-12</td>
</tr>
<tr>
<td>Supports local charities &amp; causes</td>
<td>74%</td>
<td>80%</td>
<td>+6</td>
</tr>
<tr>
<td>Turned to for info on major local issues</td>
<td>70%</td>
<td>64%</td>
<td>-6</td>
</tr>
<tr>
<td>Reflects my local interests &amp; concerns</td>
<td>76%</td>
<td>69%</td>
<td>-7</td>
</tr>
<tr>
<td>Highlights important social issues</td>
<td>76%</td>
<td>67%</td>
<td>-9</td>
</tr>
<tr>
<td>Provides opportunities to share my own views</td>
<td>74%</td>
<td>59%</td>
<td>-15</td>
</tr>
<tr>
<td>Provides high quality journalism</td>
<td>76%</td>
<td>64%</td>
<td>-12</td>
</tr>
<tr>
<td>Have learned new things whilst listening</td>
<td>73%</td>
<td>72%</td>
<td>-1</td>
</tr>
<tr>
<td>Helps me feel more involved in local community</td>
<td>73%</td>
<td>74%</td>
<td>+1</td>
</tr>
<tr>
<td>Helps me understand what’s going on in the...</td>
<td>73%</td>
<td>69%</td>
<td>-4</td>
</tr>
<tr>
<td>Plays popular music relevant to my age group</td>
<td>69%</td>
<td>68%</td>
<td>-1</td>
</tr>
<tr>
<td>Gives me a better understanding of UK news</td>
<td>69%</td>
<td>67%</td>
<td>-2</td>
</tr>
<tr>
<td>Helps me understand local politics &amp; decision</td>
<td>60%</td>
<td>74%</td>
<td>+14</td>
</tr>
<tr>
<td>Reflects local faiths, cultures &amp; communities</td>
<td>66%</td>
<td>51%</td>
<td>-15</td>
</tr>
<tr>
<td>Introduces new local performers, writers &amp;...</td>
<td>64%</td>
<td>62%</td>
<td>-2</td>
</tr>
<tr>
<td>Plays music relevant to local area</td>
<td>57%</td>
<td>60%</td>
<td>+3</td>
</tr>
<tr>
<td>Has helped me make the most of new technology</td>
<td>41%</td>
<td>72%</td>
<td>+31</td>
</tr>
</tbody>
</table>

KEY: CITIZENSHIP, CREATIVITY, EDUCATION, NATIONS, REGIONS & COMMUNITIES, GLOBAL, DIGITAL

F1. First of all, to what extent do you agree or disagree with the following statements?
F2. How important or unimportant is it for you personally that....
Base: All respondents (n=1300)
In general, the youngest listeners (under 35 years) tended to be more critical in their evaluation of the above areas, along with Black and Minority Ethnic (BAME) listeners, and less regular listeners (i.e. weekly or less often). For example, only a minority of younger listeners agreed that BBC Local Radio plays music relevant to their age group.

Some additional analysis that compared all those aged less than 45 with those aged 45 and over found that there were variations in the performance gaps between the two age groups, including more and larger gaps for younger listeners as well as some differences in which attributes recorded gaps. These differences are highlighted below:

<table>
<thead>
<tr>
<th>Biggest performance gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Under 45 years</strong></td>
</tr>
<tr>
<td>• Plays popular music relevant to my age group (-14)</td>
</tr>
<tr>
<td>• I turn to when I need information about a major local issue or crisis (-9)</td>
</tr>
<tr>
<td>• Provides high quality journalism (-9)</td>
</tr>
<tr>
<td>• Gives me a better understanding of UK-wide news and topical issues (-7)</td>
</tr>
<tr>
<td><strong>45 years and over</strong></td>
</tr>
<tr>
<td>• Helps me understand politics and decision-making in my local area (-7)</td>
</tr>
<tr>
<td>• Provides high quality journalism (-5)</td>
</tr>
</tbody>
</table>

### 4.3 Derived importance

The way correlation analysis works is explained in Section 4.1. The findings from this analysis also identified only marginal overall differences between attributes in terms of derived importance. This indicates that most aspects tested are similarly important to listeners of BBC Local Radio. However, a handful did stand out as being relatively higher priorities (i.e. with a correlation score than was closer to 1.0):

- Provides high quality journalism (0.54)
- Highlights important social issues (0.52)
- Gives me a better understanding of UK-wide news (0.52)
- Reflects my local issues and concerns (0.51)
- Gives me a better understanding of international news (0.51)

The importance placed on covering national and international news suggests that listeners are looking to Local Radio for more than just local content. This could be in order to provide a one stop shop or at least first port of call for all their news requirements. More detail on this is contained in the next section whilst Chart 8 over the page summarises the correlation scores for all 23 statements.
Chart 8: Correlation analysis

**Performance is top bar (completely, strongly and slightly agree), Importance is bottom bar (extremely, very and quite important)**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Performance</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides opportunities to hear other listeners'</td>
<td>98%</td>
<td>70%</td>
</tr>
<tr>
<td>Gives me a better understanding of local news &amp;...</td>
<td>65%</td>
<td>64%</td>
</tr>
<tr>
<td>Provides coverage of local sport</td>
<td>85%</td>
<td>80%</td>
</tr>
<tr>
<td>Provides programming &amp; content catering to...</td>
<td>65%</td>
<td>65%</td>
</tr>
<tr>
<td>Provides coverage of major events important to...</td>
<td>65%</td>
<td>65%</td>
</tr>
<tr>
<td>Tells me about local musical &amp; arts events</td>
<td>81%</td>
<td>71%</td>
</tr>
<tr>
<td>Trusted to provide impartial news</td>
<td>76%</td>
<td>64%</td>
</tr>
<tr>
<td>Supports local charities &amp; causes</td>
<td>80%</td>
<td>65%</td>
</tr>
<tr>
<td>Turned to for info on major local issues</td>
<td>76%</td>
<td>61%</td>
</tr>
<tr>
<td>Reflects my local interests &amp; concerns</td>
<td>76%</td>
<td>76%</td>
</tr>
<tr>
<td>Highlights important social issues</td>
<td>76%</td>
<td>76%</td>
</tr>
<tr>
<td>Provides opportunities to share my own views</td>
<td>76%</td>
<td>64%</td>
</tr>
<tr>
<td>Provides high quality journalism</td>
<td>76%</td>
<td>64%</td>
</tr>
<tr>
<td>Have learned new things whilst listening</td>
<td>76%</td>
<td>64%</td>
</tr>
<tr>
<td>Helps me feel more involved in local community</td>
<td>76%</td>
<td>74%</td>
</tr>
<tr>
<td>Helps me understand what's going on in the...</td>
<td>76%</td>
<td>74%</td>
</tr>
<tr>
<td>Plays popular music relevant to my age group</td>
<td>76%</td>
<td>61%</td>
</tr>
<tr>
<td>Gives me a better understanding of UK news and...</td>
<td>76%</td>
<td>61%</td>
</tr>
<tr>
<td>Helps me understand local politics &amp; decision</td>
<td>76%</td>
<td>74%</td>
</tr>
<tr>
<td>Reflects local faiths, cultures &amp; communities</td>
<td>76%</td>
<td>64%</td>
</tr>
<tr>
<td>Introduces new local performers, writers &amp; music</td>
<td>76%</td>
<td>64%</td>
</tr>
<tr>
<td>Plays music relevant to local area</td>
<td>76%</td>
<td>61%</td>
</tr>
<tr>
<td>Has helped me make the most of new technology</td>
<td>76%</td>
<td>61%</td>
</tr>
</tbody>
</table>

**Correlations with overall impressions**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Correlation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides opportunities to hear other listeners'</td>
<td>.48</td>
</tr>
<tr>
<td>Gives me a better understanding of local news &amp;...</td>
<td>.49</td>
</tr>
<tr>
<td>Provides coverage of local sport</td>
<td>.35</td>
</tr>
<tr>
<td>Provides programming &amp; content catering to...</td>
<td>.46</td>
</tr>
<tr>
<td>Provides coverage of major events important to...</td>
<td>.47</td>
</tr>
<tr>
<td>Tells me about local musical &amp; arts events</td>
<td>.41</td>
</tr>
<tr>
<td>Trusted to provide impartial news</td>
<td>.47</td>
</tr>
<tr>
<td>Supports local charities &amp; causes</td>
<td>.43</td>
</tr>
<tr>
<td>Turned to for info on major local issues</td>
<td>.46</td>
</tr>
<tr>
<td>Reflects my local interests &amp; concerns</td>
<td>.51</td>
</tr>
<tr>
<td>Highlights important social issues</td>
<td>.52</td>
</tr>
<tr>
<td>Provides opportunities to share my own views</td>
<td>.47</td>
</tr>
<tr>
<td>Provides high quality journalism</td>
<td>.54</td>
</tr>
<tr>
<td>Have learned new things whilst listening</td>
<td>.49</td>
</tr>
<tr>
<td>Helps me feel more involved in local community</td>
<td>.49</td>
</tr>
<tr>
<td>Helps me understand what's going on in the...</td>
<td>.51</td>
</tr>
<tr>
<td>Plays popular music relevant to my age group</td>
<td>.48</td>
</tr>
<tr>
<td>Gives me a better understanding of UK news and...</td>
<td>.52</td>
</tr>
<tr>
<td>Helps me understand local politics &amp; decision</td>
<td>.43</td>
</tr>
<tr>
<td>Reflects local faiths, cultures &amp; communities</td>
<td>.46</td>
</tr>
<tr>
<td>Introduces new local performers, writers &amp; music</td>
<td>.42</td>
</tr>
<tr>
<td>Plays music relevant to local area</td>
<td>.45</td>
</tr>
<tr>
<td>Has helped me make the most of new technology</td>
<td>.37</td>
</tr>
</tbody>
</table>

**KEY:** CITIZENSHIP, CREATIVITY, EDUCATION, NATIONS, REGIONS & COMMUNITIES, GLOBAL, DIGITAL

F1. First of all, to what extent do you agree or disagree with the following statements?
F2. How important or unimportant is it for you personally that....
Base: All respondents (n=1300)
4.4 Key areas of focus for BBC Local Radio in more detail

Listeners’ views on six key areas of focus for BBC Local Radio, as outlined in its Service Licence, were explored in more detail in the qualitative research. These included news, sport, music, arts and culture, reflection of the community, and listener involvement.

Respondents were given a task to discuss the above areas in smaller break-out groups and agree common importance and performance ratings, positive and negative comments, and suggested improvements. Specific aspects of these areas which had emerged as performance gaps in the survey (and reported in Section 4.2) were also probed. The findings from this exercise are summarised below.

4.4.1 News

As reported in Section 4.2, the survey found that most news-related attributes were prioritised by listeners and the BBC Local Radio was also rated highly on the majority of these. The qualitative research supports this and has shown both that news provision by Local Radio was regarded as vitally important and that BBC Local Radio was generally highly rated in terms of its performance in this area.

However, the survey also identified a few areas related to news provision where relatively higher performance gaps were recorded - these include ‘provides high quality journalism’ (-6), ‘turn to for information on major local issues’ (-5) and ‘helps me understand politics and decision-making in my area’ (-5).

Other service reviews show that a performance gap is often recorded for the attribute ‘provides high quality journalism’. In the case of Local Radio, other findings in the survey as well as in the qualitative research suggest that this is probably related to high audience expectations of the BBC on this attribute rather than performance issues per se.

The qualitative research also helps to explain the performance gap on ‘turning to Local Radio for information on major local issues’. Some respondents in the groups indicated a general preference for using more than one media source to receive information on important events or stories. For example, they may initially hear the story broken on Local Radio and then tune into a news bulletin on TV, or look at a news website, in order to get further information or additional perspectives. However, there was also a view that BBC Local Radio was not always brave enough to report on contentious issues or provoke a debate as indicated by the quotes below:

“The most current and pressing issue at this point of time is to do with the Humber Bridge tolls. Now Local Radio did not as far as I’m concerned do its job...It didn’t provoke a debate.”

Humberside, 65+ years

“They won’t touch anything like the hospitals issue. If they did that for one day, with each presenter putting forward people’s views, then lines would be jammed. The phones would be ringing off the hooks because people want to talk about it and they haven’t got a voice.”

Cumbria, 65+ years
“When there’s something big and important, like Morris was saying about the incinerator, we don’t hear much about it do we? You know, perhaps they could be a bit more involved with local things like that.”

Cornwall, 65+ years

Additionally, listeners in the qualitative research were specifically asked about what kind of news they expected from Local Radio - local only or also national and/or international. The survey had previously indicated that listeners felt the provision of local news to be more important than national or international. The qualitative research confirmed this prioritisation and showed it was not just local news but associated local weather and travel information that were prioritised. However, there was also seen to be a place for national and even international news on BBC Local Radio:

- To flag major breaking stories
- To emphasise those stories with a specific local relevance
- To give wider stories a localised slant

“Well if you take those [people] on the steps of St Pauls. I’m sure that’s being broadcast up and down the country as a national news story, but having tried to drive past there the other day and ending up half an hour late for a meeting, it was very much a London issue because it was affecting me.”

London, 45-64 years

Finally, the performance gap attribute ‘helps me understand politics and decision-making in my area’ was also explored in more detail in the qualitative research. Most listeners did not feel particularly well-informed about local politics. There was an appetite for learning more about this and Local Radio was seen as potentially playing a useful role here. For example, there were a number of suggestions made about how Local Radio could increase listeners’ understanding of local politics and decision making, as well as to hold local leaders to account. These included opportunities to:

- Discuss the big issues locally (e.g. major new developments, roads and parking chances, hospital performance, employment opportunities etc.)
- Hold phone-in surgeries with local MPs or council leaders
- Champion local causes (whilst remaining impartial and apolitical)

It is important to note that the second point is already part of some BBC Local Radio programming, but does not appear from this research to be sufficiently noticed. Some listeners themselves suggested that more cross-promotion of programmes may be required.

4.4.2 Sport

As outlined in Section 4.2, the survey found the perceived performance of BBC Local Radio to be significantly higher than its importance to listeners at an overall audience level (+15). The qualitative research found that there were polarised views as to the importance of sport coverage on BBC Local Radio. This was based on personal interests; for some it was extremely important and the biggest reason for tuning in whilst for others it was not personally relevant. Amongst those interested in this type of coverage, BBC Local Radio was generally perceived to perform well and its coverage of football in particular was praised.
However, there were a number of suggestions in the qualitative research for improvement which tended to focus on broadening the range of sports which are covered; for example:

- More lower league football (in some areas)
- Other mainstream national sports (e.g. rugby, cricket etc.)
- Other sports which are popular in the local area
- Sports that listeners have the opportunity to participate in locally

“Yeah I expect to hear the local rugby, speedway, football, ice hockey. That is basically covering a big ratio of the town…. And real grass roots because the people are thinking, ‘oh, what can I do this afternoon?’”

Coventry & Warwickshire, 45-64 years

“We would expect them to cover the local football, not just the FA… and to cover cricket…and the Olympics…and the galas because we’ve got quite a few big swimming pools around the county…and we’ve got a coastline so we’ve got sailing….Yes, include all the more popular sports locally.”

Essex, 65+ years

“Whenever they talk about sport they never give you an option if you want to get involved. I love football and I would love to play at a Thursday night game but I don’t know of anywhere locally where I can play… They could point you in the right direction if you like hockey, tennis or whatever then phone this number.”

London, under 45 years

Nonetheless, there was also a consensus that, in broadening the coverage of sport, BBC Local Radio should stop short of covering highly specialised sports which only have niche interest.

“You don’t need to harp on about every single sport there is. They can also refer people to the website.”

London, under 45 years

“Yes (they should focus on mainstream sports) because otherwise only a few people would be interested wouldn’t they? Instead of thousands of people it would be like 100 you know.”

Cornwall, under 45 years

4.4.3 Music

As indicated in Section 4.2, the music-related attributes tended to be less important to listeners at an overall audience level. The qualitative research showed that although talk is the main reason for tuning into BBC Local Radio for the majority, some (particularly older and regular listeners) reported actively following and enjoying the music on BBC Local Radio. If anything, this group would like slightly more music than there is at present.

“They don’t play a lot of music. Like, it would be nice just to have a ten minute break where they play non-stop music and back again.”

Cornwall, under 45 years
Others (mainly younger and more occasional listeners) were sometimes surprised when they
came across music for the first time on BBC Local Radio as they had previously thought it was
exclusively a talk station. Whilst this group has other stations that they turn to for music, some
felt that the playlist on BBC Local Radio was off-putting and they would welcome some
modernisation. This concurs with the survey which found that only a minority of younger
listeners agreed that BBC Local Radio plays music relevant to their age group (see Section 4.2).

“I think with the music, they are going to put off people more who are in their twenties
and thirties. It’s not that they’re trying to exclude you, but it’s not going to appeal to
that age.”

London, under 45 years

There was also a general desire across all age groups for more focus on emerging local talent.
This included a number of suggestions for specific programmes to showcase talent, potentially
with some listener involvement such as the opportunity for voting. As with the local surgery
phone-ins (see Section 4.3.1), there are already programmes in existence which showcase talent,
but there was negligible awareness of this amongst the research respondents.

“I had this idea where you could have local unsigned bands to showcase what they can
do... a one hour slot where you could showcase London talent.”

London, under 45 years

4.4.4 Arts and culture

Most attributes related to arts and culture emerged as being relatively important in the survey,
and this is also an area that BBC Local Radio scored highly on in terms of its performance (see
Section 4.2). In the qualitative research there was also general agreement that coverage of
local arts and cultural events is very important for local radio; most rated BBC Local Radio highly
on this.

However, there were some suggestions made for improvement which included:

- Placing more emphasis on less mainstream and ‘under the radar’ local events, as well as
  those involving emerging talent
- Publicising events in a regular and repeated slot so that listeners would have less chance
  of missing them
- Incorporating listener feedback and reviews on events

“Provide neighbourhood information on cultural opportunities and openings, so not just
want the tourists come to see.”

London, 45-64 years

“You could have more promotion of local musicians or bands in the area. There are a
hell of a lot of good musicians around here. They need to be pushed, given a bit of
encouragement.”

Cumbria, 45-64 years
“Let you know what events are on. You sometimes hear about it on a Monday night after it’s happened on the Sunday. You think ‘I wish I’d known about that, I’d probably have gone’.”

Nottingham, 65+ years

4.4.5 Reflecting the community

In the survey, most attributes related to reflecting the community tended to be rated highly (see Section 4.2). In the qualitative research, ‘reflecting the community’ was perceived to sum up the role of BBC Local Radio and therefore was regarded to be a vital function. BBC Local Radio was felt to be doing very well in this area in the main.

Listeners therefore did not make specific suggestions for improvement but instead identified some general principles that they felt BBC Local Radio needed to be mindful to ensuring:

- That full cultural diversity is reflected (this was less of a priority in the survey where ‘reflecting local faiths, cultures and communities’ was regarded as less important than the majority of other attributes)
- That full geographic scope of a local area is reflected
- That good news and success stories are conveyed as well

“I’ve heard people in the community’s success stories. Whether it be ethnic minorities or whatever. They do interview a lot of people about success stories and stuff.”

Nottingham, 45-64 years

“(I would expect them to) reflect and be aware of the diversity of London and take up local issues or reflect local issues in their programming.”

London, 45-64 years

4.4.6 Listener involvement

Listener involvement, and particularly providing ‘opportunities to hear other listeners’ views’, was very important to listeners in the survey and also regarded as being the top performing attribute for BBC Local Radio overall (see Section 4.2). In the qualitative research, listener involvement was felt to be the ‘life blood’ of local radio and what, more than anything else, gives it the local flavour. In fact, some specifically stated that they were more interested in hearing the views of ‘other people like them’ than presenters or other expert opinion. As only a small minority had actually taken the opportunity to participate themselves, the value of listener involvement was mainly in hearing from others.

BBC Local Radio was perceived to perform very well on this aspect already, particularly with respect to listener phone-ins.

Respondent suggestions therefore focused on alternative or additional ways of getting listeners involved, e.g.:

- Incorporating listener feedback and voting in programmes flagging events or highlighting emerging talent
- Holding quizzes and treasure hunts
- Conducting interviews on the street
- Visiting schools and other outreach activity
In addition, as previously mentioned, listener involvement was also seen to encompass getting listeners involved in their community. It was perceived to be very important that listeners be given as many opportunities as possible to take part in community activities, whether this be related to arts and culture, sporting or contribution to charity events.

“Yes, if there’s a specific charity it might be interesting to hear what it is…it covers amateur dramatics, a charity walk, anything people could do. Anything that people could take part in.”

Nottingham, 65+ years
5 DQF proposals

As mentioned in the introduction, the timing of this particular Service Review coincided with a public consultation on the Delivering Quality First (DQF) proposals. Therefore, the opportunity was taken, both in the survey and qualitative research, to explore views of the proposals as part of the research. The survey provided the opportunity to collect representative findings, whereas the qualitative research enabled the proposals to be discussed in greater detail and for more considered views to be given.

The explanation of each proposed change was taken directly from the Consultation document wording as follows:

- On weekday afternoons, between 12pm and 4pm, most stations would share programming with their neighbouring stations
- On weekday evenings, between 7pm and 10pm, programming would be shared across England with all stations coming together except when providing local sports commentaries
- At other off-peak periods programme sharing would occur at a regional level. For example, during the late evening, between 10pm and 1am, programming would be shared between stations within five regional areas
- All stations would broadcast Radio 5 Live from 1am until the start of their breakfast programming

5.1 Representative findings

Towards the end of the survey, respondents were informed about the four changes being proposed to BBC Local Radio under the Delivering Quality First (DQF) agenda. For each proposal, respondents were first asked whether they were aware of this or not, and subsequently which of the following statements best describes their views of the proposal - strongly in favour, somewhat in favour, neutral, somewhat opposed or strongly opposed.

5.1.1 Awareness of the proposals

Only a minority of BBC Local Radio listeners stated that they were aware of the proposals. Awareness was lowest (21%) for the early morning proposal and slightly higher (23-24%) for the other three proposals. Not surprisingly, awareness was higher amongst regular and affected listeners, and there were also some demographic differences as shown in Chart 9 over the page.
Chart 9: Awareness of DQF proposals

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Awareness Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekday afternoons (12-4pm):</td>
<td>24%</td>
</tr>
<tr>
<td>Shared programming with neighbouring stations</td>
<td></td>
</tr>
<tr>
<td>Weekday evenings (7-10pm):</td>
<td>23%</td>
</tr>
<tr>
<td>Shared programming across England (except local sports commentaries)</td>
<td></td>
</tr>
<tr>
<td>Other off-peak periods:</td>
<td>24%</td>
</tr>
<tr>
<td>Shared programming regionally</td>
<td></td>
</tr>
<tr>
<td>Early morning (1am to breakfast programming):</td>
<td>21%</td>
</tr>
<tr>
<td>All stations broadcast Radio 5 Live</td>
<td></td>
</tr>
</tbody>
</table>

G1. Were you aware of this or not? Base: All respondents (n=1300)

5.1.2 Reactions to the proposals

In terms of listeners’ views, there was strongest opposition (40%) and lowest favourability (25%) to the weekday afternoon proposal. The reaction to the weekday evening proposal was polarised, with slightly fewer in favour than opposed (29% in favour : 32% opposed). Conversely, more were in favour than opposed to the off-peak (36% in favour : 23% opposed) and early morning (33% in favour : 16% opposed) proposals. There were also significant ‘neutral’ ratings in each case (from 35% for afternoons to 51% for early mornings). This indicates that many were yet to make up their minds on the proposals. The full findings on this question are contained in Chart 10 over the page.
Chart 10: Overall opinions of DQF proposals

G2. Which of the following statements best describes your views to this proposal?  
Base: All respondents (n=1300)

Sub-group analysis shows that opposition to the proposals was understandably strongest amongst those who listened at affected times. In addition, mid-range age groups (35-54 years) were most opposed along with some differences between the regions and selected areas, as shown in the three charts to follow - Chart 11 shows differences by demographics and listening profile, Chart 12 indicates variations by geographic location and Chart 13 highlights how 7 selected areas that were boosted in the survey compare.
Chart 11: Those opposed to DQF proposals by demographics and listening profile

<table>
<thead>
<tr>
<th>Gender</th>
<th>Weekday evenings</th>
<th>Other off-peak periods</th>
<th>Pre-breakfast programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>32%</td>
<td>32%</td>
<td>16%</td>
</tr>
<tr>
<td>Female</td>
<td>32%</td>
<td>31%</td>
<td>17%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Weekday evenings</th>
<th>Other off-peak periods</th>
<th>Pre-breakfast programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>26%</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>25-34</td>
<td>33%</td>
<td>27%</td>
<td>18%</td>
</tr>
<tr>
<td>35-54</td>
<td>52%</td>
<td>33%</td>
<td>17%</td>
</tr>
<tr>
<td>55-64</td>
<td>29%</td>
<td>33%</td>
<td>16%</td>
</tr>
<tr>
<td>65+</td>
<td>33%</td>
<td>33%</td>
<td>15%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Social grade</th>
<th>Weekday evenings</th>
<th>Other off-peak periods</th>
<th>Pre-breakfast programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC1</td>
<td>40%</td>
<td>32%</td>
<td>16%</td>
</tr>
<tr>
<td>C2DE</td>
<td>36%</td>
<td>32%</td>
<td>15%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Weekday evenings</th>
<th>Other off-peak periods</th>
<th>Pre-breakfast programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>32%</td>
<td>31%</td>
<td>16%</td>
</tr>
<tr>
<td>BME</td>
<td>36%</td>
<td>32%</td>
<td>15%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Frequency of listening</th>
<th>Weekday evenings</th>
<th>Other off-peak periods</th>
<th>Pre-breakfast programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>41%</td>
<td>35%</td>
<td>17%</td>
</tr>
<tr>
<td>Most days</td>
<td>41%</td>
<td>34%</td>
<td>16%</td>
</tr>
<tr>
<td>2-3 times a wk</td>
<td>41%</td>
<td>32%</td>
<td>15%</td>
</tr>
<tr>
<td>Once a week</td>
<td>37%</td>
<td>31%</td>
<td>14%</td>
</tr>
<tr>
<td>Less often</td>
<td>37%</td>
<td>27%</td>
<td>13%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Listening at affected time</th>
<th>Weekday evenings</th>
<th>Other off-peak periods</th>
<th>Pre-breakfast programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>41%</td>
<td>32%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Q2. Which of the following statements best describes your views to this proposal? Base: All respondents in each subgroup (n=1300/51-1237)

Chart 12: Those opposed to DQF proposals by region

<table>
<thead>
<tr>
<th>Region</th>
<th>Weekday evenings</th>
<th>Other off-peak periods</th>
<th>Pre-breakfast programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>40%</td>
<td>32%</td>
<td>16%</td>
</tr>
<tr>
<td>London</td>
<td>32%</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>South East</td>
<td>37%</td>
<td>30%</td>
<td>10%</td>
</tr>
<tr>
<td>South</td>
<td>23%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>South West</td>
<td>56%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>East</td>
<td>42%</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>43%</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>West</td>
<td>47%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>38%</td>
<td>33%</td>
<td>21%</td>
</tr>
<tr>
<td>East Yorks &amp; Lincolnshire</td>
<td>43%</td>
<td>29%</td>
<td>16%</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>41%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>North West</td>
<td>40%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>North East</td>
<td>36%</td>
<td>26%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Q2. Which of the following statements best describes your views to this proposal? Base: All respondents in each subgroup (n=1300/63-184)
Chart 13: Those opposed to DQF proposals by 7 selected areas

Weekday afternoons
Between 12pm and 4pm, most stations would share programming with their neighbouring stations.

Weekday evenings
Between 7pm and 10pm, programming would be shared across England, with all stations coming together except when providing local sports commentaries.

Other off-peak periods
Programme-sharing would occur at a regional level. For example, during the late evening, between 10pm and 1am programming would be shared between stations within five regional areas.

Pre-breakfast programming
All stations would broadcast Radio 5 Live from 1am until the start of their breakfast programme.

5.1.3 Other comments about the proposals

There was a final open-ended question in the survey asking respondents to provide any other comments that they wished to make. The responses to this question were dominated by views of the DQF proposals. Views expressed included fears about the potential loss of local identity and suggestions that savings be found elsewhere in the BBC (e.g. reducing talent or executive salaries, or generally from TV). The verbatim responses indicate the strength of views that some listeners have on this issue and a selection of these responses is included below:

“I realise money has to be saved but PLEASE think about the fact that Local Radio provides a service and programmes that we can’t get anywhere else. There’s no real local commercial station and BBC Wiltshire provides BRILLIANT faith coverage on a Sunday morning. I feel that this should also be protected, again because we can’t get it anywhere else.”

Wiltshire, female, 45 years

“It would seem unlikely for London listeners to want a shared station and this goes for all regions. It really does sound quite absurd and more of a knee-jerk reaction than one that is thought out. I have to admit, I can’t quite believe what I’ve read!”

London, female, 41 years
“Sharing programmes with other regions completely removes any point in listening to Local Radio. Local Radio has traditionally allowed experimental and creative programming, particularly in the evening. This route for new talent will be very much diminished.”

Tees, female, 50 years

“If it costs that little to run the local stations, they are obviously wasting huge amounts elsewhere in the BBC. Cut these silly celebrity shows and high paid stars - they’re not required. Only pay high if they can bring in more income like Top Gear and World Service.”

Coventry & Warwickshire, male, 34 years

5.2 Views in more detail in 7 selected areas

The qualitative research provided the opportunity to explore why different views towards the DQF proposals were held by listeners.

5.2.1 Reasons for favourable and neutral views

Findings from the qualitative research indicated that favourable and neutral views were much the same and each meant that the listener was choosing to keep an open mind at this stage. There were some specific reasons given for taking this position:

- Respondents were generally less concerned if they were not going to be affected personally - for this reason, the off-peak and early morning proposals were least contentious
- There was a view that all organisations, including the BBC, need to save money in the current economic climate
- The focus on off-peak times was perceived to be sensible as it was felt that there would be less reliance on radio and that local issues would be less important at these times
- Some felt that it was better to amalgamate stations than to risk losing them in their entirety
- Some wanted to reserve judgement as they felt that how well the BBC executed any change would be of paramount importance
- Some felt that there could be benefits, such as better quality content or a better mix, if the changes were well-executed
- It is also worth mentioning that the existing merging (e.g. Radio 5 Live overnight in some areas) had gone relatively unnoticed amongst respondents

“From a very selfish point of view I don’t give a monkey’s. It seems to make sense from a cost perspective so I can understand it.”

London, 45-64 years

“The fact of the matter is that finances are being squeezed aren’t they? So Local Radio will either disappear or it has to amalgamate.”

Cumbria, 65+ years
“It’s still not in peak period isn’t it? As long as it’s not affecting the early morning stuff. If you’re going to have to make cuts then why not that particular portion?”

Nottingham, 45-64 years

“I was a little in favour of it because I thought it may give you a better mix… It’s one of those things where the proof of the pudding is going to be in the eating isn’t it?”

Cumbria, 45-64 years

5.2.2 Reasons for negative views and concerns

By contrast, the negative views and concerns expressed in the qualitative research were driven by:

• Fears about a potential loss of local identity (this was the single greatest concern)
• Worries about the potential loss of specific presenters or programmes
• A perception that neighbouring regions are too different, or regional groupings too broad; so ultimately, amalgamating in this way would be no better than going fully national
• Fears that this could be the ‘thin edge of the wedge’ and that BBC Local Radio may go the way of TV regions
• Concern for others who listen at affected times from a citizen’s (and PSB) perspective

“You know you’re losing your local station. You either listen to a local station to listen to the local topics and news and views, or you listen to a national station that tells you everything.”

Humberside, 45-64 years

“It’s quite a big thing here, the differences between Devon and Cornwall… there’s been rivalry since the year dot… We don’t want to hear their rubbish and they don’t want to hear ours.”

Cornwall, under 45 years

“I thought the banding is too large and not relevant to local radio, and you would therefore lose your local information.”

Essex, 65+ years

“I have no interest in anything out of London. The beauty was this morning that they said that this happened literally at the bottom of my road. If I hear things from all over the country I would listen to Radio One if I wanted this.”

London, under 45 years

“Eventually it will all be one. East Midlands and West Midlands will be together. They tried to do that on television.”

Nottingham, 65+years

“Does this mean BBC Local Radio will lose its identity and become very watered down? …I think it would become a very different animal.”

London, 45-64 years
6 Conclusions

6.1 BBC Local Radio Service Review

This research found that BBC Local Radio is a particularly distinctive service to which many listeners are strongly attached. Local Radio was highly regarded by survey respondents (average favourability rating of 7.6 out of 10) and also perceived to offer good value for money in its current form (89% perceived it to offer good value for money). In addition, eight in ten (82%) said that they would miss it if it was no longer there, whilst just over seven in ten perceived the service to have programmes they want to listen to (72%), and well-made, high quality programmes (71%). The qualitative research indicated that listeners particularly value the provision of local news and information, coverage of local sport and the general sense of community conveyed by local radio. However, there was also a perception that sometimes the welcomed informality crosses too far into trivia at the expense of the more serious issues that it was felt BBC Local Radio should be covering. In addition, it was felt that the content on Local Radio can be repetitious at times.

In general, BBC Local Radio was perceived to be highly performing in terms of its Public Purposes, with high performance and importance scores and very few negative performance gaps. Its key strengths are perceived to be around the Citizenship and Nations, regions and communities Public Purposes.

The survey found news-related attributes to be particularly prioritised by listeners, and BBC Local Radio was rated highly on the majority of these. Interestingly, audiences placed importance on BBC Local Radio also covering national and international news stories, which suggests that some listeners may be turning to BBC Local Radio for more than just local news. In the qualitative research, listeners indicated that they would be particularly interested in those broader (national and international) news stories which have a local relevance, but also that Local Radio should flag any major breaking stories wherever they occur. In addition, listeners felt it was important that BBC Local Radio was brave enough to tackle controversial local topics and some also suggested a potential role to help facilitate listener interaction with local leaders.

Amongst those listeners who are interested in sport, BBC Local Radio was generally perceived to perform well in this area and particularly in its coverage of football. However, it was felt that there could be a broadening of coverage to include all national sports and also the most popular sports in each specific local area.

At an overall audience level, music-related attributes tended to be less important to listeners. However, although speech might be the main reason to tune in, some listeners did say that they actively follow and enjoy the music on BBC Local Radio. There were some suggestions made for a slight up-weighting of music content compared to present levels (to provide variety), as well as a slight modernising of the repertoire (to appeal more to younger listeners).

BBC Local Radio was rated highly in terms of reflecting the community and this was thought to be a vital function for the service by many listeners. It was not voiced as a criticism, but listeners wanted BBC Local Radio to be mindful of representing the full diversity of the local area, including its geographical as well as ethnic and cultural variations.
Attributes relating to arts and culture also performed well and listeners felt that coverage of these areas was important for Local Radio. There was a feeling that there could be more focus on lower profile and more ‘under the radar’ local events, as well as events involving emerging local talent.

Listener participation was very important to listeners and was the top performing attribute for BBC Local Radio overall. Most claimed not to participate in the radio programmes themselves, so the value of listener involvement mainly came from being able to hear other people’s views. Some suggestions were made about how to enhance what was already seen to be a high performing area for Local Radio. These included using other methods as well as phone-ins to encourage involvement (e.g. quizzes, outreach), and encouraging listeners to get involved in their community as well as in the station by promoting participation opportunities (e.g. in sports, culture, charities etc.).

Significantly, some of the suggestions made by listeners for new content (e.g. programmes to champion local talent and phone-in surgeries with local leaders) already exist on some Local Radio stations, but there tended to be low awareness of this. There were some who therefore specifically suggested that there be more cross-promotion of content within Local Radio.

6.2 DQF proposals

Once informed of the proposed DQF changes, the majority of listeners were not opposed to any of the proposals. However, qualitatively there was a considerable strength of feeling amongst those listeners who did express concerns. The main fears related to the potential loss of local identity which was regarded to be the raison d’être for BBC Local Radio. There were also concerns around the potential loss of presenters or programmes and there was a perception that neighbouring regions were too different or regional groupings too broad.

A sizeable proportion could be more accurately described as taking a ‘wait and see’ attitude than being supportive of the proposals. They were generally less concerned if they were not going to be personally affected and for this reason, the off-peak and early morning proposals were least contentious. There was also a view that all organisations need to save money and some felt that the changes could be beneficial such as providing better quality content or a better mix.

However, the strength of views expressed about the potential changes as stated at the time of this research indicated that moving forward with the proposals could provoke specific criticisms of the BBC’s priorities and commitment to Public Service Broadcasting.
APPENDIX
A. Research materials

BBC Trust - BBC Local Radio Review

Final questionnaire (CATI version)

INTRODUCTION

CONTACT NUMBER GENERATED BY RANDOM DIGIT DIALLING

Good morning/afternoon/evening. My name is ….. calling on behalf of Jigsaw Research.

We are carrying out an important survey about BBC Local Radio. You have the opportunity to have your say on BBC Local Radio and a chance to influence what the BBC does in the future by taking part in this research.

IF NECESSARY:

The interview should last about 20 minutes.

We would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual or contact details in the results.

A - SCREENER

Firstly, we need to collect some details about you to make sure we speak to a representative spread of people.

A1 Please can you tell me your full postcode? IF NECESSARY SAY: The reason that we need to take your postcode is to ensure we ask you about the correct BBC Local Radio station for your area and to help us analyse the information we receive by geographic region. I can assure you that this information is completely confidential and won’t be shared with any other organisation.

TYPE IN

(REFER TO QUOTAS)

(A1 WILL ALSO BE USED TO GENERATE THE SPECIFIC BBC LOCAL STATION/S TO ASK RESPONDENTS ABOUT IN A2)
A2 Have you personally listened to [insert (primary) BBC Local Radio station for specific area] in the last month? This could be on any device e.g. radio, television, internet etc.

Yes

No/Don’t know - THANK AND CLOSE

A3 PLEASE CODE SEX OF RESPONDENT

Male

Female

(REFER TO QUOTAS)

A4 What was your age on your last birthday?

TYPE IN AND CODE APPROPRIATE RANGE

15-24
25-34
35-44
45-54
55-64
65-74
75+
Refused

(REFER TO QUOTAS)

B - OTHER RADIO AND TECHNOLOGY CONSUMPTION

B1 Which if any other radio stations have you personally listened to in the last month? This could be other BBC radio stations, commercial stations which play adverts or community radio. IF NECESSARY REPEAT: This could also be through any device e.g. radio, television, internet etc. DO NOT READ OUT - PROMPT: Any others? MULTI-CODE
B2 Does your household receive Digital Television, that is any TV station which allows you to receive more than the standard five terrestrial TV channels (BBC1, BBC2, ITV1, Channel 4 and Five)?

Yes
No
Don't know
B3 Have you used the internet at home in the last month?

Yes
No
Don’t know

C - OVERALL BBC VIEWS

Before we ask you about [insert local radio station for specific area] we want to ask some questions about your views of the BBC generally.

C1 Thinking about the BBC generally, what is your overall impression on scale of 1-10, where 1 means extremely unfavourable and 10 means extremely favourable?

1. Extremely unfavourable
2.
3.
4.
5.
6.
7.
8.
9.
10. Extremely favourable

C2 The TV licence fee, which pays for all BBC services including television, radio, online content and digital switchover costs £145.50 per year. This works out about £12.10 a month. It must be paid by most households with a colour television, although those aged 75+ are exempt and there are discounts for blind or visually impaired people. Thinking back over the last month and remembering the BBC programmes you and our household may have watched on TV or heard on the radio, as well as any BBC websites you may have visited, please could you tell me the extent to which you feel your household gets value for the licence fee you pay? READ OUT LIST. SINGLE CODE

Very good value
Fairly good value
Not very good value
Not at all good value
Don’t know

D - BBC LOCAL RADIO LISTENING HABITS
We would now like to ask you about [insert BBC Local Radio station for specific area].

D1a Thinking about when you listened to [insert BBC Local Radio station for specific area] over the last month. Did you listen on weekdays? Did you listen Saturdays? Did you listen on Sundays? MULTI-CODE

Weekdays
Saturdays
Sundays
Don’t know

D1b IF LISTENED ON WEEKDAYS ASK: At which times of day have you listened to [insert BBC Local Radio station for specific area] during weekdays in the last month? READ OUT LIST AND MULTI-CODE

Weekday breakfast (typically 6am-9am)
Weekday mornings (typically 9am-12pm)
Weekday afternoons (typically 12pm-4pm)
Weekday drivetime or early evening (typically 4pm-7pm)
Weekday evenings (typically 7pm-midnight)
Weekday overnight (typically midnight-6am)
Don’t know

D1c IF LISTENED ON SATURDAY ASK: At which times of day have you listened to [insert BBC Local Radio station for specific area] during Saturdays in the last month? READ OUT LIST AND MULTI-CODE

Saturday breakfast (typically 6am-9am)
Saturday mornings (typically 9am-12pm)
Saturday afternoons including Saturday Sport (typically 12pm-6pm)
Saturday evening or night (typically 6pm-midnight)
Saturday overnight (typically midnight-6am Sunday)
Don’t know

D1d IF LISTENED ON SUNDAY ASK: At which times of day have you listened to [insert BBC Local Radio station for specific area] during Sundays in the last month? READ OUT LIST AND MULTI-CODE

Sunday breakfast (typically 6am-9am)
Sunday mornings (typically 9am-12pm)
Sunday afternoons (typically 12pm-6pm)
Sunday evening or night (typically 6pm-midnight)
Sunday overnight (typically midnight-6am Monday)
Don’t know

D2 How often did you listen to [insert BBC Local Radio station for specific area] in the last month?

Every day
Most days
2-3 times a week
About once a week
About once a fortnight
About once during the month
Don’t know

D3 In which of these ways do you tend to listen to [insert BBC Local Radio station for specific area]? READ OUT LIST. MULTI-CODE

Through a normal analogue radio or tuner - FM band
Through a normal analogue radio or tuner - AM or MW (Medium Wave) band
Through a DAB digital radio
Through digital television
On the internet e.g. through bbc.co.uk or iPlayer
Through a mobile
Don’t know
Other (specify)

E - VIEWS OF BBC LOCAL RADIO

E1 Thinking about the [insert BBC Local Radio station for specific area] generally, what is your overall impression on a scale of 1-10, where 1 means extremely unfavourable and 10 means extremely favourable?

1. Extremely unfavourable
2.
3.
4.
5.
6.
7.
8.
9.
10. Extremely favourable

E2 To what extent do you agree or disagree with that:

IF MORE THAN ONE APPIES, RANDOMISE LIST

- I would miss [insert BBC Local Radio station for specific area] if it wasn’t there
- ONLY ASK IF RADIO STATIONS OTHER THAN THE BBC MENTIONED IN B1: I would miss the commercial or community station that I listen to most if it wasn’t there
- ONLY ASK IF OTHER BBC RADIO STATIONS MENTIONED IN B1: I would miss the BBC Radio station other than [insert BBC Local Radio station for specific area] that I listen to most if it wasn’t there

READ OUT LIST

Definitely disagree
Tend to disagree
Neither agree nor disagree
E3 To what extent do you agree or disagree that [insert BBC Local Radio station for specific area]:

RANDOMISE LIST

- Has well made, high quality programmes
- Has programmes with new ideas and different approaches
- Has programmes that make me think
- Has programmes that I want to listen to

E4 What is it, if anything, that [insert BBC Local Radio station for specific area] offers that you can't get from any other radio station? PROMPT ONLY IF RESPONDENT CAN'T ANSWER: Think about programmes, presenters or nature of the content. IF 'LOCALNESS' MENTIONED PROBE FOR WHAT SPECIFICALLY IS MEANT BY THIS. OPEN-ENDED

F - PUBLIC PURPOSES

The BBC has a duty to ‘inform, educate and entertain’ the UK public in return for the licence fee that is charged. The objective of all BBC Local Radio stations is to provide news, information debate and music to local communities, and particularly to appeal to listeners aged 50 and over.

You will be asked to consider a number of statements and rate how well you think [insert BBC Local Radio station for specific area] is doing on each of these as well as how important this is to you. Please consider carefully before giving your answer.

F1 First of all, to what extent do you agree or disagree with the following statements?

Completely disagree
Disagree strongly
Disagree slightly
Neither agree nor disagree
Agree slightly
Agree strongly
Completely agree

RANDOMISE STATEMENTS

[Insert BBC Local Radio station for specific area in place of ‘....’ below]

(Sustaining citizenship and civil society)
1. ...provides high quality journalism
2. I trust ... to provide me with impartial news
3. ...helps me understand politics and decision-making in my local area
4. I turn to ... when I need information about a major local issue or crisis
5. ... gives me a better understanding of UK-wide news and topical issues
6. ...gives me a better understanding of news and topical issues in my local area
7. ...provides opportunities to hear other listeners' views
8. ...provides opportunities to share my own views

(Promoting education and learning)
9. I have learned new things whilst listening to programmes on...
10. ...highlights to me important social issues
11. ...supports local charities and social causes

(Stimulating creativity and cultural excellence)
12. ...introduces me to new performers, writers and musical artists from my local area
13. ... tells me about musical and arts events taking place in my local area
14. ...plays music that is relevant to my local area
15. ...plays popular music that is relevant to my age group

(Representing the UK, its nations, regions and communities)
16. ...provides programming and content that caters for my local area
17. ...helps me feel more involved and interested in my local community
18. ...reflects my local interests and concerns
19. ... ...reflects the range of faiths, cultures and communities in my local area
20. ...provides coverage of major events and anniversaries that are important to people in my local area
21. ...provides coverage of local sporting teams and local sporting events

(Bringing the UK to the world and the world to the UK)
22. ...Helps me understand what’s going on in the wider world, such as international news and events

(...Delivering to the public the benefit of emerging communications technologies and services...)
23. ...has helped me to make the most of new technologies such as digital/DAB radio and the internet

F2 How important or unimportant is it for you personally that....

REPEAT LIST, AGAIN RANDOMISED

Extremely unimportant
Very unimportant
Quite unimportant
Neither important nor unimportant
Quite important
Very important
Extremely important

F3 Out of the £145.50 licence fee, around £5.97 a year is used to fund a total of 40 BBC Local Radio stations across England. Thinking specifically about how your licence fee is spent, please tell me whether or not you feel BBC Local Radio is good value for money.

READ OUT LIST

Very good value
BBC Trust Review of BBC Local Radio

Fairly good value
Not very good value
Not at all good value
Don’t know

G - PROPOSED CHANGES

Last year the funding for the BBC until 2017 was agreed and the BBC will have 16% less funds available in real terms. This means that the BBC will have to make significant changes. Some proposals have been made public on how BBC Local Radio can contribute to these savings.

I am now going to read out the main proposals and for each, ask you whether you were aware of this or not, and what your views are to this proposal? READ OUT LIST

RANDOMISE ORDER

• On weekday afternoons, between 12pm and 4pm, most stations would share programming with their neighbouring stations
• On weekday evenings, between 7pm and 10pm, programming would be shared across England, with all stations coming together except when providing local sports commentaries
• At other off-peak periods, programme sharing would occur at a regional level. For example, during the late evening, between 10pm and 1am programming would be shared between stations within five regional areas: the North, the West Midlands, the East Midlands, the East and South East, and the West and South West
• All stations would broadcast Radio 5 Live from 1am until the start of their breakfast programme

G1 Were you aware of this or not?
Yes
No

G2 Which of the following statements best describes your views to this proposal?
I’m strongly in favour
I’m somewhat in favour
I’m neutral
I’m somewhat opposed
I’m strongly opposed
(DO NOT READ) Don’t know

G3 Do you have anything else you would like to comment on with regards to [insert BBC Local Radio station for specific area] in any of the areas we’ve been asking about?
OPEN-ENDED

H - DEMOGRAPHICS

The final few questions will be used to help us analyse the results. Please be assured once again that all answers you provide will remain confidential.

H1 How many people (adults and children) live in your household including yourself?
 TYPE IN NUMERIC RANGE

Refused

H2  Do you have any children aged less than 18 living in the household for whom you are responsible?

   Yes
   No
   Don’t know

H3  IF HAVE CHILDREN AGED LESS THAN 18 ASK: In which of the following age bands are your children? MULTI-CODE

   0-1
   2-4
   5-9
   10-15
   16-17
   Refused

H4  Which of these best describes your employment at the moment?

   Working in a paid job - 30+ hours
   Working in a paid job - 8-29 hours
   Working in a paid job - Less than 8 hours
   Self-employed
   Not in paid employment/looking after house or home
   Full time student at school
   Full time student at university/polytechnic/college
   Unemployed
   Retired from paid employment
   Other

H5  Social grading questions to be asked here then CODE SOCIAL GRADE HERE

   A
   B
   C1
   C2
   D
   E
   Don’t know
   Refused
   Not stated

H6  Which the categories A-E, best describes your ethnic origin? READ OUT LIST A-E.

ONCE RESPONDENT HAS CHOSEN FROM A-E, SAY: And within category (INSERT AS APPROPRIATE), which answer best describes your cultural background?

   A. White
      British
      Irish
      Other

   B. Mixed
White & Black Caribbean
White & Black African
White & Asian
Any other mix

C. Asian or Asian British

Indian
Pakistani
Bangladeshi
Other

D. Black or Black British

Caribbean
African
Other black background

E. Chinese or Other Ethnic Background

Chinese
Other (specify)

H7 Do you follow any particular religion or other belief?

Yes
No
Don’t know

H8 IF YES ASK: Which religion or other belief do you follow? DO NOT READ OUT.

Roman Catholic
Church of England
Christian (unspecified)
Buddhist
Hindu
Jewish
Muslim
Sikh
Refused
Other (specify)

H9 Do you have any long-term illness, health problems or disability which limits your daily or the work you do? This includes problems due to old age.

Yes
No
Don’t know
Refused
**BBC Local Radio**

**Discussion guide - Final**

**Objectives:**

- To examine further **performance gaps** identified in the quantitative research – what they expect from the BBC, does the BBC’s performance fall short and in what way, and what could be done to improve
- To validate **problem areas** coming out of the public consultation – in terms of how important these are to BBC Local Radio listeners
- To explore **additional questions** which are more qualitative in nature— e.g. what ‘localness’ means to people, what they value about local radio, what are the barriers to listening more, how local radio compares/fits with other BBC radio stations, how it compares with commercial stations, and what genres and areas of the radio schedules are important
- To discuss the **proposed changes** to Local Radio currently being discussed
- To understand how **7 Local Radio stations** selected by the BBC Trust are perceived in depth, including the similarities and differences between these

<table>
<thead>
<tr>
<th>15 mins</th>
<th>Introduction and warm-up</th>
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<tbody>
<tr>
<td></td>
<td><strong>Moderator introduction:</strong></td>
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<td></td>
<td>- Explanation of purpose of research:</td>
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<tr>
<td></td>
<td>- BBC Trust is conducting a one of their programme of regular review of BBC services – this one focuses on the 40 BBC Local Radio services across England to establish how well they are meeting their objectives as outlined in their service licences</td>
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<tr>
<td></td>
<td>- This qualitative research will form part of the findings (along with a quantitative survey, analysis of other data and a public consultation)</td>
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<tr>
<td></td>
<td>- Explanation of research process:</td>
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<td></td>
<td>- Two hour session</td>
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<td>- Not a test</td>
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<td></td>
<td>- Views confidential/taping</td>
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<td></td>
<td>- Everyone contribute/fair say/respect differences</td>
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<td></td>
<td>- Different activities and tasks/have fun</td>
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<td></td>
<td>- Housekeeping (refreshments, toilets, fire procedures)</td>
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<td></td>
<td>- Respondent introductions:</td>
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<tr>
<td></td>
<td>- Name and brief personal background</td>
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<tr>
<td></td>
<td>- Details of BBC Local Radio listening - how often, days and times of day, any specific types of content (genres, programmes, presenters), how listen</td>
</tr>
<tr>
<td>35 mins</td>
<td>Overall perceptions of BBC Local Radio</td>
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<tr>
<td>-----------------</td>
<td>-------------------------------------</td>
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<tr>
<td>For regular listeners: ‘Retirement speech’ exercise</td>
<td>- Each respondent to write a short ‘retirement speech’ for BBC Local Radio (what value most, what miss if it was gone)</td>
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<tr>
<td></td>
<td>- Choose a selection to read out and discuss, identifying any additional points or points of difference</td>
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<tr>
<td></td>
<td>- Probe what value most about BBC Local Radio overall and whether there is anything that they would not miss</td>
</tr>
<tr>
<td>For occasional listeners: Personification exercise</td>
<td>- Male/female, how old, personality, relationship with respondent etc.</td>
</tr>
<tr>
<td>Discuss perceived strengths and weaknesses about BBC Local Radio – moderator to flip-chart</td>
<td>- Drawing on likes and dislikes from pre-task</td>
</tr>
<tr>
<td></td>
<td>- Probe views of specific genres (news, sport, music, arts/culture) and parts of the schedule (times of day, days of week, programmes, presenters) – NB: might also need to get respondents to move beyond specific programmes/presenters if get stuck at this level</td>
</tr>
<tr>
<td></td>
<td>- Any changes perceived over last few years, either positive or negative?</td>
</tr>
<tr>
<td></td>
<td>- What if anything is preventing occasional listeners from tuning into BBC Local Radio more often? What if anything could BBC Local Radio do to encourage them to listen to it more?</td>
</tr>
<tr>
<td></td>
<td>- Show flipchart of other stations that respondents have experience of and discuss:</td>
</tr>
<tr>
<td></td>
<td>- How similar or different BBC Local Radio is compared to each of these?</td>
</tr>
<tr>
<td></td>
<td>- Overall how unique is BBC Local Radio perceived to be?</td>
</tr>
</tbody>
</table>
In what specific ways is it unique – from other BBC radio stations and from commercial stations?

### Probing priority areas

- Explain that some specific areas have emerged from the survey and consultation that we want to explore in more detail:
  - News coverage
  - Sport coverage
  - Music/culture coverage
  - Opportunities for listener participation
  - Reflection of the local community

- Split group into two and each smaller group to focus on 2-3 areas and answer following questions:
  - How important is this for BBC Local Radio to deliver?
  - What specifically expect from BBC Local Radio on this?
  - How well does BBC Local Radio perform and why?
  - How could it improve/what more could it do?

- Each smaller group to present back and briefly discuss in the round

- Additional probes – news coverage:
  - How important is helping you to ‘understand local politics and decision-making’? What mean?
  - How important is ‘holding local decision-makers to account’? What mean? How about local campaigns to change council or local business plans – are these an example?
  - Is it enough to turn just to BBC Local Radio for coverage of major national issues, or need to use other sources as well? Why/why not?

- Additional probe – sport coverage:
  - What is the relative importance on BBC Local Radio of football coverage vs. other mainstream sports vs. minority sports?

- Additional probes – music/culture coverage:
  - How do young people feel about the relevance of music on BBC Local Radio to their age group? How much does this matter?
  - How do respondents overall feel about the relevance of music on BBC Local Radio to their local area? How much does this matter?

- Additional probe – reflecting local community:
  - How well do different age groups feel that local issues and concerns relevant
to their age group are being reflected by BBC Local Radio?

- Additional probe - participation:
  - How important hearing other listeners’ views vs. having opportunities to sharing own views? How well does BBC Local Radio do on each – both in terms of numbers and quality?

<table>
<thead>
<tr>
<th>20 mins</th>
<th>Proposed changes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Moderator to explain that funding for BBC until 2017 has been agreed and the BBC will have 16% less funds available in real terms. This means that the BBC will have to make significant savings, some of which will need to come from services including Local Radio.</td>
</tr>
<tr>
<td></td>
<td>Gauge whether any spontaneous awareness of proposed changes to BBC Radio and, if so, what aware of</td>
</tr>
<tr>
<td></td>
<td>Provide respondents with questionnaire to match survey questions (G1 and G2) and each respondent initially to complete individually</td>
</tr>
<tr>
<td></td>
<td>Then discuss:</td>
</tr>
<tr>
<td></td>
<td>- Whether recall any of these being discussed?</td>
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<tr>
<td></td>
<td>- Refer to specific changes planned for individual station (refer to Local Radio Station Schedules 7 stations document) – make any difference to your views?</td>
</tr>
<tr>
<td></td>
<td>- Go through each and get indication of how many are in favour, neutral, somewhat opposed or strongly opposed to it?</td>
</tr>
<tr>
<td></td>
<td>- For those the majority are opposed to, what are their specific concerns?</td>
</tr>
<tr>
<td></td>
<td>- For those in favour, what do they think some potential benefits could be?</td>
</tr>
<tr>
<td></td>
<td>- For those neutral, why – is it because they would be personally unaffected, they think it won’t make much difference overall or they can see the need etc.?</td>
</tr>
<tr>
<td></td>
<td>- Overall, what more information or reassurances want from the BBC?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5 mins</th>
<th>Summing up</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Explain that currently just under £6 from the £145 licence fee is used to fund a total of 40 Local Radio stations across England –overall, is this seen to be good or not good value for money and why?</td>
</tr>
<tr>
<td></td>
<td>Sum up what you want to see from BBC Local Radio over the next 5 years (e.g. things do more of or less of, what to preserve etc.)?</td>
</tr>
</tbody>
</table>
B. BBC Radio regions and selected stations

Chart A: BBC Radio regions and selected stations for survey boost and qualitative research

<table>
<thead>
<tr>
<th>REGION</th>
<th>STATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>BBC Radio London</td>
</tr>
<tr>
<td>South East</td>
<td>BBC Radio Kent, BBC Radio Sussex &amp; Surrey</td>
</tr>
<tr>
<td>South West</td>
<td>BBC Radio Devon, BBC Radio Cornwall, BBC Radio Jersey, BBC Radio Guernsey</td>
</tr>
<tr>
<td>South</td>
<td>BBC Radio Solent, BBC Radio Solent for Dorset, BBC Radio Oxford, BBC Radio Berkshire</td>
</tr>
<tr>
<td>West</td>
<td>BBC Radio Gloucester, BBC Radio Bristol, BBC Radio Somerset, BBC Radio Wiltshire</td>
</tr>
<tr>
<td>East Midlands</td>
<td>BBC Radio Nottingham, BBC Radio Derby, BBC Radio Leicester</td>
</tr>
<tr>
<td>West Midlands</td>
<td>BBC Radio West Midlands, BBC Radio Coventry &amp; Warwickshire, BBC Radio Stoke, BBC Radio Shropshire, BBC Radio Hereford &amp; Worcester</td>
</tr>
<tr>
<td>North East</td>
<td>BBC Radio Newcastle, BBC Radio Tees, BBC Radio Cumbria</td>
</tr>
<tr>
<td>North West</td>
<td>BBC Radio Manchester, BBC Radio Merseyside, BBC Radio Lancashire</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>BBC Radio Leeds, BBC Radio Sheffield, BBC Radio York</td>
</tr>
<tr>
<td>East Yorks &amp; Lincolnshire</td>
<td>BBC Radio Lincolnshire, BBC Radio Humberside</td>
</tr>
</tbody>
</table>

= selected radio stations
C. Sample profile from survey

Chart B: Demographic profile (1)

<table>
<thead>
<tr>
<th>Gender</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Total number in household</th>
<th>Working status</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 to 24</td>
<td>8% 22%</td>
<td>Working full-time</td>
</tr>
<tr>
<td>25 to 34</td>
<td>8% 44%</td>
<td>Working part-time</td>
</tr>
<tr>
<td>35 to 44</td>
<td>11% 13%</td>
<td>Self-employed</td>
</tr>
</tbody>
</table>
| 45 to 54 | 17% 8%                    | Not in paid...
| 55 to 64 | 19% 13%                   | Full time student |
| 65 to 74 | 24% 19%                   | Unemployed |
| 75+      | 13% 22%                   | Retired |

<table>
<thead>
<tr>
<th>Children in household</th>
<th>Social grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>No children under 18</td>
<td>A 95%</td>
</tr>
<tr>
<td>Any aged 0 to 1</td>
<td></td>
</tr>
<tr>
<td>Any aged 2 to 4</td>
<td></td>
</tr>
<tr>
<td>Any aged 5 to 9</td>
<td></td>
</tr>
<tr>
<td>Any aged 10 to 15</td>
<td></td>
</tr>
<tr>
<td>Any aged 16 to 17</td>
<td></td>
</tr>
</tbody>
</table>


Chart C: Demographic profile (2)

<table>
<thead>
<tr>
<th>Region</th>
<th>Ethnicity</th>
<th>Religion/belief</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>White</td>
<td>No particular religion/belief</td>
</tr>
<tr>
<td>South East</td>
<td>Mixed</td>
<td>Church of England</td>
</tr>
<tr>
<td>South</td>
<td>Asian/Asian British</td>
<td>Roman Catholic</td>
</tr>
<tr>
<td>South West</td>
<td>Black/Black British</td>
<td>Christian (unspecified)</td>
</tr>
<tr>
<td>East</td>
<td>Chinese/Other Ethnicity</td>
<td>Methodist</td>
</tr>
<tr>
<td>East Midlands</td>
<td></td>
<td>Hindu</td>
</tr>
<tr>
<td>West</td>
<td></td>
<td>Jewish</td>
</tr>
<tr>
<td>West Midlands</td>
<td></td>
<td>Other</td>
</tr>
<tr>
<td>East Yorks &amp; Lincs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yorkshire</td>
<td></td>
<td></td>
</tr>
<tr>
<td>North West</td>
<td></td>
<td></td>
</tr>
<tr>
<td>North East</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

H6-H9. Base: All respondents (n=1300)
Chart D: Listening profile (1)

Days listened to BBC Local Radio in the last month

- Weekdays: 85%
- Saturdays: 50%
- Sundays: 40%

Times of day listened to BBC Local Radio in the last month

- Breakfast: 49%
- Mornings: 48%
- Afternoons/drivetime: 57%
- Evenings: 21%
- Overnight: 6%

D1a. Thinking about when you listened to [BBC Local Radio station] over the last month. Did you listen on weekdays/Saturdays/Sundays? Base: All respondents (n=1300)

D1b/c/d. At which times of day have you listened during weekdays/Saturdays/Sundays in the last month? Base: All listening on those days (n=1099/644/517)

Chart E: Listening profile (2)

Frequency of listening to BBC Local Radio in the last month

- Every day: 20%
- Most days: 25%
- 2-3 times a week: 27%
- About once a week: 18%
- About once a fortnight: 6%
- About once a month: 4%

Medium normally used to listen to BBC Local Radio

- Normal analogue radio - FM band: 68%
- DAB digital radio: 27%
- Normal analogue radio - AM or MW band: 11%
- Internet: 9%
- Digital television: 8%
- Mobile phone: 4%

D2. How often did you listen to [BBC Local Radio station] in the last month? D3. In which of these ways to you tend to listen to [BBC Local Radio station] Base: All respondents (n=1300)
Chart F: Listening profile (3)

- **Other radio stations listened to**
  - Any other BBC Radio station: 75%
  - Any commercial radio station: 60%
  - No other radio station: 12%

- **Use of other technology**
  - Household receives Digital Television: 96%
  - Used Internet at home in the last month: 83%

B1. Which if any other radio stations have you personally listened to in the last month?
B2. Does your household receive Digital Television, that is any TV station which allows you to receive more than the standard five terrestrial TV channels?
B3. Have you used the Internet at home in the last month? Base: All respondents (n=1300)