

Service review

BBC Radio 2 and BBC 6 Music

February 2010



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Summary

Background

1. The BBC Trust is the governing body of the BBC and it is our responsibility to get the best out of the BBC for licence fee payers. One of the ways we do this is by carrying out an in-depth review of each of the BBC's services at least once every five years. This time we have reviewed BBC Radio 2 and its sister station BBC 6 Music.
2. Radio 2 is a mixed music and speech service, targeted at everyone over 35. 6 Music is a digital radio station which plays popular music outside the mainstream from the 1960s to the present day. It also broadcasts documentaries, news and live music.
3. The Trust sets out what it expects from each service in a published service licence. Our review had three broad aims: firstly to assess how well Radio 2 and 6 Music are performing against commitments set out in these licences, secondly to consider the stations' future direction and, thirdly, to determine whether amendments to the licences are required.
4. We carried out a public consultation in the summer of 2009 and received around 4,700 responses from licence fee payers and the radio industry. These responses alongside our audience research, performance monitoring and financial analysis have given us a clear picture of the two stations' strengths and weaknesses.

Conclusion

BBC Radio 2 is a very successful station. It is the most listened to station in the UK and is highly regarded by its audience. Radio 2 should use this scale and influence to take more creative risks and be more distinctive, particularly in daytime, even though this more ambitious approach carries with it the risk that audience numbers could fall.

BBC 6 Music is well liked by its listeners, although these are relatively few in number. The station must raise awareness and grow its audience to realise its potential. The challenge for 6 Music will be to do this without jeopardising the aspects which set it apart from other services.

Key findings

Radio 2 is the nation's favourite radio station but faces criticism from some commercial radio stations

5. In a submission to this review RadioCentre, a trade body representing commercial radio, criticised Radio 2 for being too similar to other radio stations. RadioCentre argued that Radio 2 prioritises reach at the expense of public value, targets young listeners who fall outside the station's remit and costs too much money. In our findings we have weighed these concerns carefully against what the audience has told us.
6. Some 13.3 million people tune in to Radio 2 every week making it the most listened to station in the UK. Consultation responses indicate that many listeners hold Radio 2 in high regard. This is consistent with the results of audience surveys which show that the station scores higher for quality measures than comparable commercial stations. Radio 2 also makes an important contribution to the BBC's public purposes (the BBC's Charter requirements concerning citizenship, diversity, learning, creativity, media literacy and bringing the world to the UK). Our research shows that in relation to each of these purposes the station exceeds audience expectations. Performance was particularly strong for purposes relating to music, news and current affairs.

Listeners think the station is distinctive and offers value for money

7. We carried out a survey of Radio 2 listeners and found that 80 per cent feel that Radio 2 offers something that could not easily be replaced by any other station. This finding is consistent with our analysis of Radio 2's output. We found that the station offers a wider range of content and musical genre than any other station. There is also very little song overlap with comparable commercial stations, with Radio 1 or with 6 Music.
8. Radio 2 costs each licence fee payer around £2.10 a year. The vast majority of listeners (92 per cent) and the majority of the population as a whole (53 per cent) think this represents good value for the licence fee payer. The station's popularity means that it has a lower cost per listener hour than any other BBC radio station (around 0.5 pence).

Radio 2 is taking steps to become more efficient

9. We recognise that audience perception and cost per listener hour are not in themselves measures of efficiency, and when the National Audit Office (NAO) carried out a review of radio efficiency on the Trust's behalf last year they highlighted significant cost variations between Radio 2 and other radio stations. In part these variances can be explained by differences in the range and quality of Radio 2's speech and music content. Indeed, many of the programmes which audiences consider to be most distinctive are also among the most costly. However, differences in scope and ambition do not account for all of the variances in cost and, alongside 6 Music, Radio 2 has plans to secure some £14million efficiency savings by the end of the current licence fee settlement in 2012-13. In response to the NAO's recommendations as well as the Trust's 2008 review of talent costs the BBC Executive Board has been benchmarking production costs and presenter costs to help identify these savings.

10. The Trust believes that there may be opportunities to make further savings by progressing plans to benchmark costs with commercial radio and revisiting talent saving targets, given that the economic climate has worsened since the Trust first reviewed talent costs in 2008.

We have asked Radio 2 to ensure that the average age of its audience does not fall and have identified some other areas for improvement

11. We have looked in detail at commercial radio's concerns that Radio 2 is targeting younger audiences at the expense of older audiences. This issue is important because, with the exception of Radio 2, there are very few popular music stations that serve older audiences. Radio 2's remit is to appeal to all ages over 35 but between 1999-2000 and 2004-05 the station's under 35 audience grew significantly (albeit from a low base). However, since 2004-05 the age profile of the station has remained stable and there has been no increase in reach to under 35 year olds. Today, some 82 per cent of Radio 2's listeners are within the target age group and the average age of the audience is 50. We believe that Radio 2 should maintain this stability, protect the interests of older listeners and ensure that the average age of the station does not fall.
12. We have made a number of other recommendations in our report where we feel performance could be improved. For example, we would like Radio 2 to address variations in reach between different audience groups and do more to promote the benefits of new technology so that hard to reach groups do not get left behind. On the whole, however, Radio 2 performs well and we believe that this strong performance gives the station an opportunity to raise the bar still further.

Radio 2 should use its size and influence to make a greater contribution to the BBC's public purposes in peak time

13. Nearly 5 million Radio 2 listeners listen to no other BBC radio and around 2 million listen to no other radio at all. We think that this scale, alongside the privilege of licence fee funding, gives Radio 2 an opportunity to make a greater contribution to the BBC's public purposes.
14. Our research indicates that people who listen off-peak have a higher opinion of Radio 2's delivery of the public purposes than those who listen only in peak time. We would like Radio 2 to provide the peak time audience with more content that the licence fee payer cannot hear anywhere else. We recognise that Radio 2 is an entertainment station and would like the Executive to preserve the aspects of the service which make it popular. However, while it is vital that the BBC reaches large audiences doing so is not an end in itself for a public service broadcaster and we accept that some loss of audience may be a consequence of a more varied and challenging selection of programmes.

6 Music is very popular among its listeners, although these are relatively few in number

15. For 6 Music we believe the challenge is rather different. We have found that the station is well liked by its listeners and on the whole meets their expectations for delivery of the public purposes. Over the last four years the station's reach has grown faster than that of

any other BBC digital-only radio service but because this growth has been from a relatively low base the station is still only reaching around 1 per cent of the adult population. Low reach seems to be compounded by low awareness, with just 20 per cent of the adult population aware that the station exists. We believe that the station needs to raise awareness and grow its audience to realise its potential and, in doing so, should seek to appeal to a more diverse range of people, particularly older listeners.

6 Music is distinctive but the challenge will be to keep it that way whilst at the same time growing its audience

16. Like Radio 2, the majority of 6 Music listeners think the station is distinctive. Some 82 per cent believe that the service offers something which could not easily be replaced by another station. 6 Music's distinctiveness is driven by its breadth and depth of music content and this is reflected in data on music overlap between stations, which shows that very few tracks are on both 6 Music and Radio 1, Radio 2 or comparable commercial radio stations in a typical week.
17. Some consultation respondents have criticised individual 6 Music presenters for lacking musical credibility and failing to set their shows apart from content on other stations. The presenters attracting criticism tended to be those who had been introduced to give the station a broader base of appeal. This highlights a potential tension between 6 Music's aim to grow its audience and at the same time remain distinctive.
18. During our review we have worked with BBC management to clarify 6 Music's strategic direction. The station has committed to a distinctive music policy, with a schedule built around celebrating the alternative spirit of popular music. We have made recommendations throughout this report to safeguard the aspects of 6 Music which set it apart from other stations both in terms of the music it plays but also its speech content. This speech content should add context to the music through authoritative presentation, features and documentaries which aim to develop an understanding of the music and its context.

There is scope for 6 Music to become more efficient and more cost effective

19. 6 Music has an annual budget of £6million and in 2008-09 had a cost per listener hour close to the average for the BBC's digital-only stations. However, like Radio 2, 6 Music has been criticised for costing too much money in comparison to commercial radio stations. Such comparisons are problematic as there are significant differences in the range and quality of 6 Music's offer compared with commercial digital-only stations. Nevertheless, where 6 Music's activities are comparable we expect the Executive to deliver savings and cut presentation costs to make the station more efficient. The Executive has plans in place to deliver these savings by 2012-13 and, as set out above, has been benchmarking costs to help implement these plans.
20. As well as becoming more efficient we also expect the station to become more cost effective by growing its reach without additional investment.

Recommendations

21. Our recommendations are set out below and detailed findings are presented in the main body of this report.
22. It is the BBC Trust's job to shape the BBC in the interest of licence fee payers - to challenge BBC management to make changes and achieve them quickly. We felt that some of the changes could usefully be implemented prior to the publication of our report, to take advantage of schedule changes planned in January. This means that the Executive has already begun to implement some of our recommendations while others will take longer to take effect. The implementation date is set out beneath each recommendation.

1. Enhance Radio 2's distinctiveness through an increased contribution to the public purposes

- a) Radio 2 should enhance delivery of the BBC's public purposes by further integrating peak and off-peak content. We have discussed this ambition with Radio 2 management who have responded with plans to:
 - take extracts from off-peak content such as comedy, the arts and documentaries and repackage them so they are suitable for peak time
 - consider how to use the 7 pm slot on Radio 2, which inherits a significant audience from peak time, to increase the prominence of some of Radio 2's more ambitious public purpose content
 - adopt a more ambitious approach to Radio 2 social action campaigns. These campaigns will seek to bring cultural as well as social benefits and will be delivered through a wider range of programmes in the peak time schedule to achieve greater impact and reach a wider audience.

Implementation date: ongoing

- b) Radio 2 should refresh its comedy output and consider how best to schedule it to gain greater impact from existing levels of investment in this genre. The station should also ensure that Radio 2 comedy is better differentiated from comedy on Radio 4.

We welcome Radio 2's plans to set up a BBC-wide comedy network to help achieve this by providing a more co-ordinated approach to commissioning.

We also welcome plans to enhance the impact of arts programming through scheduling, editorial content and greater use of on-demand services.

Implementation date: ongoing

- c) Radio 2 has been less successful than other BBC stations at encouraging its audience to listen digitally or go online. The station should use its influence to promote the benefits of digital media so that hard to reach groups do not get left behind. It is particularly important for Radio 2 to promote digital radio, including its sister station 6 Music.

Implementation date: ongoing

2. Protect the interests of Radio 2's older listeners and address differences in reach between different audience groups

- a) Radio 2's remit is to appeal to all age groups over 35. The Trust is sympathetic towards commercial radio's concern that Radio 2's audience has become younger. However, we do not believe that growth of the 35-44 year old audience should be reversed because this age group falls within the remit of Radio 2 and the percentage of 35-44 year olds reached is lower than average for Radio 2's target audience.

The Executive should seek to reduce the percentage of Radio 2's audience which falls outside the target audience, although we recognise that some younger listeners are inevitable as an individual's taste in radio is not always clearly defined by their age.

Radio 2 should investigate reasons for the decline in audience among over 65 year olds and, in particular over 75 year olds, with the aim of addressing this decline. In doing so, the station should consider whether its range of music continues to meet this audience's expectations.

Over the past five years the average age of the station's audience has remained stable. We anticipate that in the short term the age profile may fluctuate following recent presenter changes but Radio 2 should ensure that the average age of its audience does not fall below 50 for any sustained period without corrective action. We will track Radio 2's average age through our quarterly performance assessments and will report publicly on the station's performance in future Annual Reports.

Implementation date: ongoing. The Trust will intervene and ask management to take corrective action if the average age of the station's audience falls below 50 for a sustained period.

- b) The Trust welcomes the Executive's plans to increase the ethnic diversity of Radio 2's audience, which is skewed towards a white demographic. We also recommend that the Executive aims to reduce variations in reach between other demographic groups given that the less well off, people in Northern Ireland and, to a lesser extent, women are also less likely to listen.

Implementation date: ongoing

3. Grow 6 Music's reach and strengthen aspects of the service which make it distinctive without increasing costs

- a) 6 Music's audience is growing but the station is still reaching only a small percentage of the population and there are relatively few visitors to its website. To realise its potential the station must raise awareness and increase its reach.

6 Music is intended to appeal to all enthusiasts of popular music outside the mainstream since the 1960s. However, the station currently appeals less to older people, to listeners from lower income households, to women and to ethnic minorities. The station should increase its appeal to alternative popular music enthusiasts from

groups which are currently less likely to listen. In particular the station should seek to attract older listeners, given that the average age of its audience is 36.

During the course of this review, the Executive has developed plans to grow reach and the Trust will track progress over the coming months.

Implementation date: ongoing

- b) 6 Music has developed a more focused brand identity to help the station promote itself to the audience in a more targeted way.

We will amend the station's service licence to reflect this. The first line of the station's remit will change from:

'The remit of BBC 6 Music is to entertain lovers of popular music with a service offering music from the 1960s to the present day'

to

'The remit of BBC 6 Music is to entertain lovers of popular music with a service that celebrates the alternative spirit in popular music from the 1960s to the present day'.

Implementation date: spring 2010

- c) One of the things which set 6 Music apart from other stations is its potential to extend listeners' musical repertoire and equip audiences to make informed choices without the influence of commercial pressure. The station should ensure that its presenters are not only popular but also have strong musical credibility so they can:

- act as trusted guides for music enthusiasts through the increasingly wide range of music available through digital technology
- effectively deliver the station's remit to develop an understanding of music and its context.

Implementation date: ongoing

- d) The Executive should report to the Trust with a target for 6 Music's audience based on an assessment of likely potential listeners.

This target should act as both an incentive for and a limit to growth by helping us to understand how far the station can grow without changing its distinctive character.

Implementation date: spring 2010

- e) 6 Music's documentary output is currently not meeting audience expectations. This output is important as it helps the station to meet its service licence obligation to develop an understanding of popular music and its context. Working within the constraints of the station's budget the Executive should seek to address this shortfall.

Implementation date: ongoing

- f) BBC research indicates that 6 Music listeners are less likely to describe the station as 'high quality' and 'engaging', or to recommend the website to a friend than listeners to comparable digital radio stations. This is surprising given that listeners tend to have a favourable overall impression of the station. Management should establish whether existing measures present an accurate picture of 6 Music's performance and if so should develop plans to improve the station's performance in these areas. The Executive should report its conclusions to the Trust in the spring.

Implementation date: spring 2010

- g) To make 6 Music more cost effective, plans to grow reach should be implemented without increasing costs. The station should consider whether focusing greater resources on fewer programmes to boost quality would help to achieve this aim. This approach would involve investing in content that both suits on-demand listening and can easily be repeated.

Implementation date: ongoing

4. Strengthen the Radio 2 and 6 Music Service Licences to safeguard features which currently differentiate these services from other stations

- a) The Trust believes that distinctiveness and differentiation between BBC services is of critical importance. Therefore, we will amend the Radio 2 and 6 Music service licences to emphasise the importance of minimising song overlap between these two stations and between these stations, Radio 1 and commercial radio.

The Executive should incorporate song overlap into its regular performance reports to ensure that levels of overlap in daytime remain at their current low level. The Executive should also introduce monitoring of levels of overlap for new music played on Radio 1, Radio 2 and 6 Music to help ensure that these stations offer listeners a distinctive range of new releases in keeping with their different remits.

Implementation date: spring 2010

- b) To safeguard Radio 2's delivery of the public purposes we will amend the service licence conditions to:
- be clear that UK and new music conditions relate to the number of plays rather than different tracks played¹
 - introduce a condition to safeguard Radio 2's documentary output. The station will be required to broadcast at least 130 hours of documentaries each year.

Implementation date: spring 2010

- c) 6 Music's live music is performing well and exceeding audience expectations but research carried out by the Executive suggests that there is an opportunity to raise

¹ 'Tracks' refers to the total number of different titles, irrespective of the number of times each is played; and 'Plays' refers to the total number of songs played including multiple plays of an individual title.

awareness and make an even greater impact with this content. The Executive plans to achieve this by focusing resources on fewer sessions to enhance quality and using these recordings more frequently across the schedule.

The station is currently exceeding by some margin its service licence condition for the number of live music sessions broadcast each year. We will increase the service licence requirement from 275 to 300 sessions to ensure that current performance is maintained and to safeguard this distinctive aspect of 6 Music's offer. The new 300 session requirement is still below the number of sessions currently recorded, giving the Executive scope to focus on quality rather than quantity to enhance this content's impact.

Implementation date: spring 2010

- d) 6 Music's service licence condition that half of its music should be more than four years old establishes an arbitrary cut off date which refers to no clearly definable musical era. It should be replaced by one that establishes a ceiling on 'new music' defined as either unreleased or less than one month since release date (physical release, not download release). This definition is the same as that used by Radio 2 and can be monitored in the same way. The ceiling on new music should be set at 30 per cent rather than 50 per cent to reflect 6 Music's responsibility regarding older music.

Implementation date: spring 2010

5. Make a further contribution to efficiency saving and talent cost saving targets

- a) The Trust welcomes the progress made by the Executive in response to the NAO's review of radio efficiency. This work has informed the Executive's plans to save some £14million from Radio 2 and 6 Music by 2012-13.

Plans to benchmark costs with commercial radio have progressed more slowly than first anticipated. These plans present an opportunity to make further efficiency savings and should be progressed as fast as possible although we recognise that implementation is not entirely within the Executive's control and is dependent on an agreement being reached with commercial radio.

The Trust will continue to monitor efficiency savings and will report progress against targets through the Annual Report.

Implementation date: begin benchmarking with commercial radio by spring 2010

- b) The Executive should report to the Trust with revised talent cost saving targets for the BBC as a whole, given that the economic climate has worsened since the Trust first reviewed talent costs in 2008.

Implementation date: spring 2010

Main Report

Introduction

Review scope

23. Radio 2 is a mixed music and speech service, targeted at everyone over 35. It broadcasts a wide range of music and speech programmes on FM radio, and on digital platforms such as DAB digital radio, digital television and the internet. 6 Music is available on digital platforms only and does not have a target age group. It plays popular music outside the mainstream from the 1960s to the present day. It also broadcasts documentaries, news and live music.
24. Our review had three broad aims:
- to assess how well Radio 2 and 6 Music are performing against commitments set out in their service licences
 - to consider the stations' future direction
 - to determine whether amendments to the service licences are required.
25. The detailed scope of our review was set out in our terms of reference which were published in May 2009². The scope did not include editorial controls, talent costs or the BBC's independent supply quota for radio as these topics are covered by other pieces of work being carried out by the Trust. We have, however, drawn on the findings from this work to the extent that it could inform our assessment of Radio 2 and 6 Music's performance.
26. In November 2009, the Chairman of the Trust, Sir Michael Lyons, announced that the BBC was carrying out a strategic review to determine what the BBC should concentrate on in the future. The Executive was asked to conduct the review with input and oversight from the Trust. Radio 2 and 6 Music's futures are being considered alongside other services as part of this strategic review. The findings from our review of Radio 2 and 6 Music, set out in this report, will be used to inform our assessment of the Executive's proposals.

Methodology

27. This review was carried out for the Trust by its independent advisers in the Trust Unit under the direction of the review's lead Trustee, David Liddiment. We gathered evidence from a wide range of sources which are summarised below.
28. **Consultation** - We used the service licences to develop a set of questions for public consultation. The consultation ran for 12 weeks from May to July 2009 and we received some 4,700 responses from licence fee payers, organisations and the Trust's Audience Councils in England, Northern Ireland, Scotland and Wales. These Councils are chaired by the BBC Trust member for that nation and have links with various local communities in

² http://www.bbc.co.uk/bbctrust/assets/files/pdf/consult/r2_6music/tor.pdf

their area. The Councils organise events and activities to advise the Trust on how well the BBC is serving licence fee payers in different parts of the UK.

29. We also consulted with the BBC Executive Board, commercial radio stations, Ofcom, interest groups and RadioCentre, a representative body for commercial radio.
30. **Performance data analysis** – We analysed performance data using the BBC's RQIV performance framework which considers four drivers of public value – reach, quality, impact and value for money. This framework is set out in Figure 1.

Figure 1: The BBC's RQIV performance framework

Reach – The extent to which BBC services are used by the audience. In this report, unless otherwise stated, the reach of radio services is expressed as the percentage of the population who have listened for at least 5 consecutive minutes in an average week.

Quality – Quality is often measured in terms of audience perception. In particular the BBC measures characteristics which Ofcom considers should be features of public service broadcasting. These characteristics are 'high quality', 'original', 'challenging', 'innovative' and 'engaging'.

Impact – The extent to which BBC content creates public value by delivering the BBC's public purposes. The purposes are set out in the BBC's Royal Charter and can be summarised as follows:

- **Citizenship** - sustain citizenship and civil society
- **Education** - promote education and learning
- **Creativity** - stimulate creativity and cultural excellence
- **Diversity** - represent the UK, its nations, regions and communities
- **Global** - bring the UK to the world and the world to the UK
- **Digital** - help to deliver to the public the benefit of emerging communications technologies and services.

Value for Money – A consideration of performance (reach, quality and impact) alongside cost to provide a perspective on cost effectiveness.

31. We carried out our performance analysis using the following evidence sources:
- radio audience data from Radio Joint Audience Research (RAJAR) based on around 30,000 listening diaries filled out each quarter
 - online usage figures based on the BBC's server logs and Nielsen Netratings, a panel-based measurement system which provides monthly usage figures for internet sites

- regular BBC audience surveys which measure audience perceptions of content from the BBC and other providers
- financial data taken from the BBC's Annual Report and management accounting system.

Audience research – The Trust carried out audience research to supplement the data available from the sources described above. We commissioned the British Market Research Bureau (BMRB) to carry out a representative survey of Radio 2 and 6 Music listeners to measure audience approval, establish how well the stations were delivering the public purposes and assess whether the stations offer something different from content available on other radio stations.

32. Further information about the Trust's approach to service reviews including the service licences operating framework can be found on the Trust website at www.bbc.co.uk/bbctrust.

Report structure

33. The main body of this report is split into two sections. The first looks at Radio 2 and the second at 6 Music. Performance is assessed using the BBC's reach, quality, impact and value for money performance framework. Where we think changes are needed to improve performance or shape the future direction of either of the two stations this is noted by recommendations or proposed service licence amendments.

Radio 2 findings

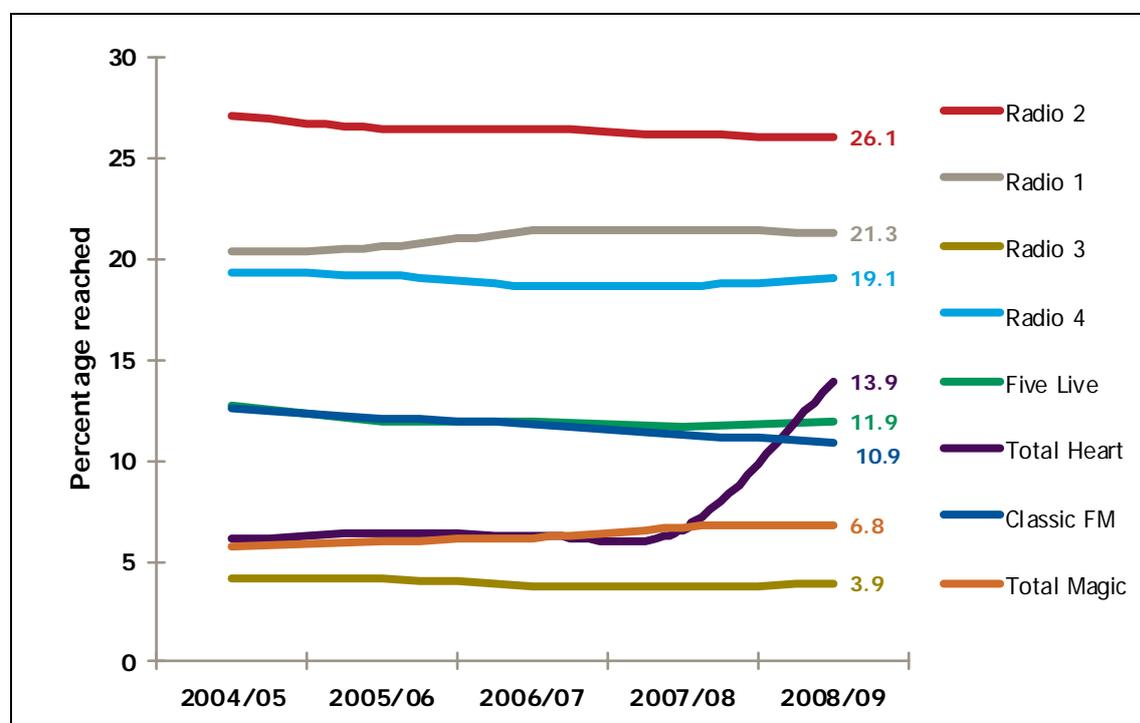
Radio 2 is a very successful station. It is the most listened to station in the UK and is highly regarded by its audience. Radio 2 should use this scale and influence to take more creative risks and be more distinctive, particularly in daytime, even though this more ambitious approach carries with it the risk that audience numbers could fall.

Reach

Radio 2 has more listeners than any other radio service in the UK

34. Radio 2's service licence requires the station to appeal to a broad audience and listening figures indicate that this objective is being met. In 2008-09 around a quarter of the adult population, some 13.3 million people, tuned in to Radio 2 every week. As set out in Figure 2 reach has remained relatively stable over the last five years and is consistently higher than that of any other UK station.

Figure 2: The percentage of the adult population reached by Radio 2 and other radio stations



Source: RAJAR 2008-09

Note: Heart Network increased by 29 stations when GCap was taken over by Global Radio in 2008

35. Radio 2 makes a significant contribution to BBC radio's overall reach. There is some audience overlap with other BBC stations, particularly among listeners aged under 35, over half of who also listen to Radio 1. However, 36 per cent of Radio 2 listeners do not listen to any other BBC radio content.
36. As well as generating large numbers of listeners, Radio 2 also inspires a high degree of loyalty to the station's output. Listeners tune in for an average of over 12 hours per week, more than 2 ½ hours more than the average amount of listening to Radio 1.

Radio 2's popularity is driven by AM and FM radio rather than newer communications technology

37. The significant majority³ of listening to Radio 2 is via the analogue AM and FM frequencies and time spent listening via digital platforms (a DAB radio set, digital television or online) is below average for the BBC's analogue radio stations.
38. Usage of the Radio 2 website also lags behind other BBC stations. In 2008-09, Radio 2's website had an average of some 280,000 Unique Users a week, significantly fewer than Radio 1 (888,000) and Radio 4 (480,000). Usage of the site has remained static over the last year compared with a 15 per cent growth for Radio 1 and 29 per cent growth to

³ Some 70 per cent in 2008-09

Radio 4's site. Feedback received by the Trust's Audience Council in England during our consultation indicated that some users felt the website was difficult to navigate. Radio 2 updated and re-launched its website in spring 2009 but there has been no significant increase in usage over the following months.

39. We carried out research to find out how well Radio 2 was delivering the BBC's public purposes. Our findings, which are set out in detail later in this report (paragraphs 72 to 90), indicate that for each purpose Radio 2 is meeting audience expectations. However performance varied between purposes and the lowest performing area was the digital purpose, which requires the BBC to help deliver to the public the benefit of emerging communications technologies and services.
40. Radio 2's broad base of appeal means the station has an important role to play in promoting the benefits of newer technology, particularly among hard to reach groups such as older listeners. The station's appeal across different generations means that it is well placed to encourage existing users of digital technology to pass on skills to non-users.
41. In discussions with the Trust, the Executive has recognised that Radio 2 could make more of a contribution in this area by deepening the experience of existing users and also helping non-users to recognise the benefits, acquire the skills and have confidence to use them.

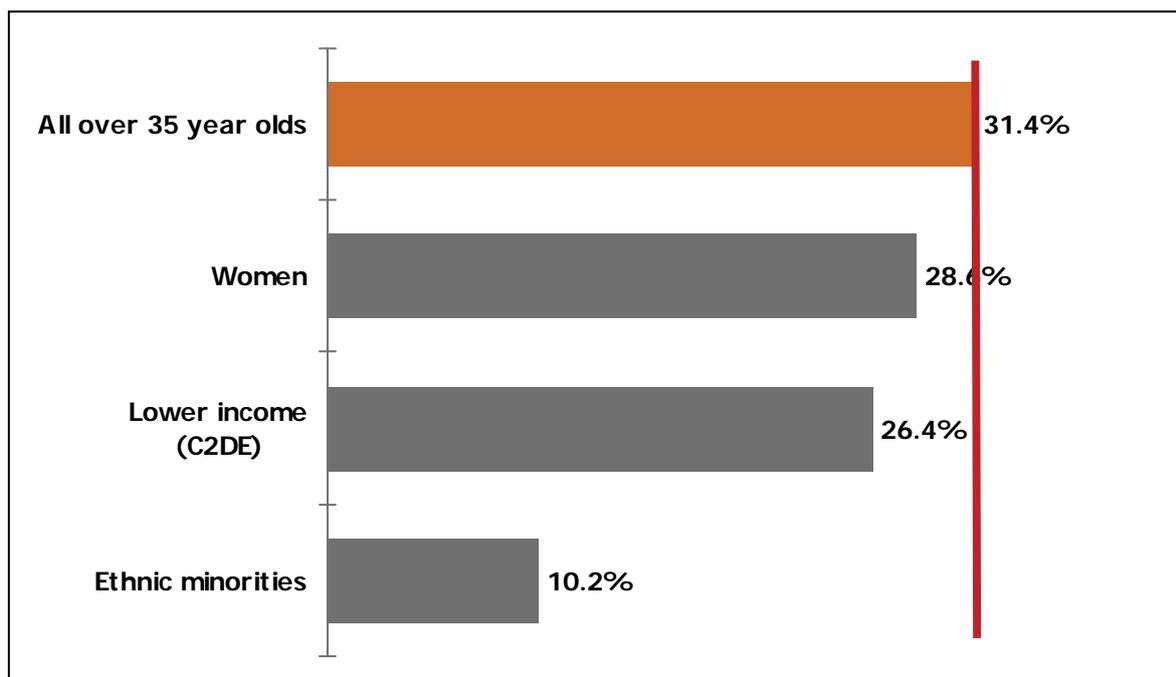
Recommendation

Radio 2 has been less successful than other BBC stations at encouraging its audience to listen digitally or go online. The station should use its influence to promote the benefits of digital media so that hard to reach groups do not get left behind. It is particularly important for Radio 2 to promote digital radio, including its sister station 6 Music.

Radio 2's reach is higher among some groups than others

42. The size of Radio 2's audience means that the station reaches significant numbers of people from a wide range of backgrounds. However, Figure 3 shows that among Radio 2's target audience (people aged 35 and over), women, the less well off (C2DEs) and ethnic minorities are less likely to listen to Radio 2 than average. Similar variations in reach apply to BBC radio taken as a whole and, to lesser extent, all other radio. However, Radio 2's variations are more pronounced and have grown over the last five years. Ethnic minorities in particular are less likely to listen.

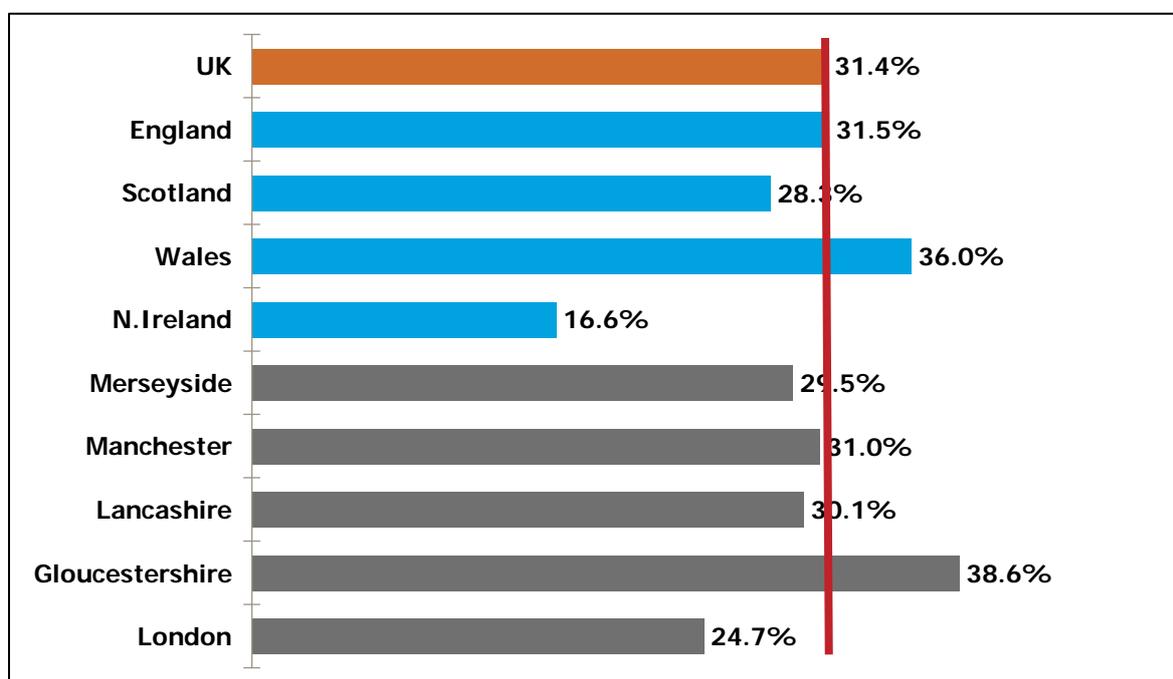
Figure 3: The percentage of different population groups among its target audience reached by Radio 2



Source: RAJAR 2008-09, over 35 year olds

43. These variations in reach are consistent with the results of our audience research on the purposes. Performance against Radio 2's purpose to represent the UK, its nations, regions and communities was weak in relation to other areas (although, as noted in paragraph 73, Radio 2 was still meeting audience expectations for this and every other purpose).
44. During this review the Executive has set out its intention to increase the ethnic diversity of the station's audience by:
- promoting greater off-air diversity to bring a wide range of cultural perspectives to the station's output
 - strengthening on-air multi-cultural representation by building on the existing range in specialist music such as soul and gospel, and seeking greater diversity in on-air talent and contributors during key parts of the schedule
 - appointing a senior manager to lead initiatives, raise awareness and track progress.
45. As set out in Figure 4 there are also significant variations Radio 2's reach in different parts of the UK.

Figure 4: The percentage of over 35 year olds in the different nations and regions reached by Radio 2



Source: RAJAR 2008-09, over 35 year olds

46. In large metropolitan areas commercial radio has a stronger presence than in less densely populated areas like Gloucestershire. This helps to explain why Radio 2's reach tends to be lower in urban areas, although it is still relatively strong. Even in London, Radio 2's reach exceeds that of commercial stations⁴.
47. There are also variations in reach between England, Northern Ireland, Scotland and Wales. Lower levels of reach in Scotland and Northern Ireland should be considered alongside the performance of the BBC's national radio stations, Radio Scotland and Radio Ulster/Foyle⁵. In Scotland, Radio 2 is the most popular music station in spite of the strong appeal of Radio Scotland. The Trust's Audience Council in Scotland consulted local communities to inform this review and concluded that, while Radio 2 is considered by some to lack material specific to Scotland, listeners think that Radio 2's UK focus complements the Scottish perspective offered by Radio Scotland.
48. The Trust's Audience Council in Northern Ireland also consulted local audiences and found that some listeners felt that Radio 2 could do more to reflect Northern Ireland in its output. These listeners made reference to the presenters, news, traffic updates and the locations for live events. These consultation responses are consistent with the results of our audience research, which showed that 38 per cent of listeners in Northern Ireland give Radio 2 an approval score of 8-10 on a 10 point scale, compared with 64 per cent of all adult listeners.

⁴ 2008-09 percentage reach

⁵ Radio Ulster broadcasts in Northern Ireland with Radio Foyle providing content for the Londonderry area.

49. This may go some way to explain why Radio 2's reach in Northern Ireland is significantly lower than the UK average, but it is also important to note that BBC Radio Ulster/Foyle has a very large audience. Radio Ulster/Foyle's strength means that taken together, BBC Radio stations in Northern Ireland reach 64 per cent of the population, which is close to the UK average of 66 per cent.
50. The Audience Council in Northern Ireland recognises that the overlap in the target audiences of Radio 2 and Radio Ulster/Foyle helps to explain Radio 2's lower reach but emphasises that the two stations have different remits. The Council suggests that commitment to Radio 2's audience in Northern Ireland should be sustained to maximise choice for local audiences.

Recommendation

The Trust welcomes the Executive's plans to increase the ethnic diversity of Radio 2's audience, which is skewed towards a white demographic. We also recommend that the Executive aims to reduce variations in reach between other demographic groups, given that the less well off, people in Northern Ireland and, to a lesser extent, women are also less likely to listen.

Commercial radio stations have criticised Radio 2 for growing reach among younger audiences at the expense of older audiences

51. Radio 2 has been criticised in recent years by commercial radio stations for adopting a strategy which targets younger audiences at the expense of older audiences. These stations argue that younger audiences aged 15-44 are already well served by commercial radio because advertisers are keen to reach this demographic.
52. Radio 2's remit is to appeal to all age groups over 35. In a submission to this review commercial radio's representative body, RadioCentre, stated that Radio 2's reach to 15-34 year olds grew by 62 per cent between January 1999 and December 2008 while the station's reach to 65 year olds declined over the same period. This caused the average age of a Radio 2 listener to fall from 53 to 50 despite the upward trend in the age of the UK population as whole. RadioCentre would like to see this audience trend reversed and argues that the shifts have been brought about by changing programming policies including an emphasis on new music and on hiring presenters who appeal to younger listeners.
53. This issue has become increasingly important to commercial radio in recent years as technological advances have generated increased competition for listeners' time and more recently the economic climate has exerted further pressure on advertising revenues. The issue is also important for older listeners as there are very few popular music stations which specifically aim to cater for over 65 year olds.
54. RadioCentre also raised concerns about the age profile of Radio 1's audience during the Trust review of BBC services for younger audiences in 2009. Radio 1 was criticised for appealing to listeners who fall outside the 15-29 target age range of the station. The

Trust concluded that Radio 1 should take steps to ensure that the average age of its listeners remains within the station's target age range.

Reach among 35-44 year olds has grown faster than any other age group

55. Figure 5 shows the percentage of each age group reached by Radio 2 in 1999-2000, 2004-05 and 2008-09. Between 1999-2000 and 2004-05 reach among 35-44 year olds grew faster than that to any other age group. However, 35-44 year olds form part of Radio 2's target audience and in 1999-2000 reach was lower than average among this age group. At that time, the station was reaching 17.4 per cent of 35-44 year olds compared with 20.7 per cent of the population as a whole. By 2008-09 reach had increased to 28.3 per cent, which is lower than average for Radio 2's target audience⁶.

Figure 5: Percentage of different age groups reached by Radio 2

	1999-2000 (%)	2004-05 (%)	2008-09 (%)	Movement (percentage points)
All adults	20.7	27.2	26.1	5.4
Age 15-24	7.1	11.2	11.2	4.1
Age 25-34	10.6	20.8	18.4	7.8
Age 35-44	17.4	28.8	28.3	10.9
Age 45-54	27.6	36	34.8	7.2
Age 55-64	32.7	37	36.8	4.1
Age 65-74	32.0	31.3	30.3	-1.7
Age 75+	27.1	26.6	23.7	-3.4

Source: RAJAR. Average weekly reach by age-group

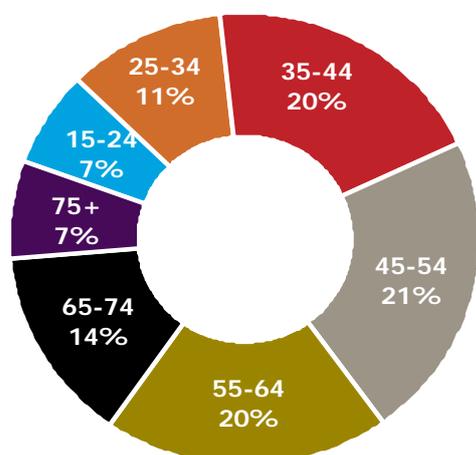
The 15-34 year old audience has grown and now constitutes 18 per cent of Radio 2's total audience

56. Radio 2's 15-34 audience falls outside the station's remit and grew significantly between 1999-2000 and 2008-09 albeit from a relatively low base. This means that, in spite of rapid growth, by 2008-09 15-34 year olds made up only 18 per cent of the audience compared with 32 per cent of the UK population as a whole (figure 6). It is inevitable that some of Radio 2's audience will fall outside the target age group of the station, given that people's taste in radio is not always clearly defined by their age and because in some cases, such as in the workplace or in cars, people listen without choosing to because they do not have control of the radio. Nevertheless, it is important that Radio 2 focuses on its target audience to avoid overlap with other BBC radio stations and commercial radio.

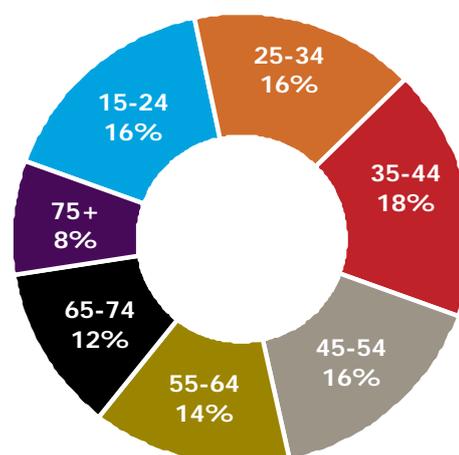
⁶ In 2008-09 Radio 2 reached 31.4 per cent of over 35 year olds.

Figure 6: Age composition of Radio 2's audience compared with the population as a whole

Radio 2 adult audience



UK adult population



Source: RAJAR. Reach profile 2008-09

Over the past five years there has been no growth in reach to younger audiences and the average age of the station's audience has remained stable at 50 years old

57. Figure 5 shows that Radio 2's growth occurred between 1999-2000 and 2004-05 when all age groups grew with the exception of the over 65s. Since then the age profile of the station has stabilised. There has been no growth in reach among 15-24 year olds since 2004-05, reach has fallen slightly among 24-35 year olds and the average age of Radio 2's audience has remained stable at 50.

58. On 11 January 2010 Chris Evans replaced Terry Wogan in the station's breakfast show slot. Some commercial radio stations have raised concerns that this will lower the average age of the station's audience on the basis that Evans's age and presentation style make him more appealing to younger listeners. There is not a straightforward link between a presenter's age and that of the audience. For example, when Chris Evans, aged 43, replaced Jonnie Walker, aged 64, the average age of the audience stayed the same at 49⁷ and when Jeremy Vine, aged 44, replaced Jimmy Young, aged 88, the average age of the audience stayed the same at 52⁸. Nevertheless, there is a risk, given Terry Wogan's longevity as a presenter, that fluctuations in reach and age profile will occur at least in the short term.

Radio 2's over 65 year old audience is declining

59. Figure 5 shows that reach among those aged 65 and over has declined over the last ten years. This decline is more significant among over 75 year olds, where reach has

⁷ RAJAR Quarter 2 2005 compared with Quarter 2 2006

⁸ RAJAR Quarter 1 2002 compared with Quarter 1 2003

declined from 27.1 per cent in 1999-2000 to 23.7 per cent in 2008-09⁹. As set out in Figure 6, over 65 year olds still form a significant part of Radio 2's audience but one commercial radio station has argued that reach figures do not adequately reflect Radio 2's appeal to this age group. This station argues that older listeners are unhappy with Radio 2 but are continuing to listen because there are few alternative stations catering for them. To test this, we looked at trends in quality measures among this age group as well as the length of time over 65 year olds spend listening to Radio 2. We found that both approval scores (measured through audience surveys) and time spent listening had remained stable, indicating that Radio 2 still holds strong appeal for these listeners.

60. Nevertheless, should the number of over 65 year old listeners continue to decline this will be a cause for concern. Our audience research¹⁰ and public consultation indicated that one of the most important factors which determines whether Radio 2 appeals to an individual is the station's choice of music. Some respondents feel strongly that older music genres from the 40s, 50s and 60s are no longer sufficiently featured in Radio 2's output. In particular, a number of respondents suggested that a lack of traditional jazz put Radio 2 in breach of its service licence. This is not the case as Radio 2 does not have a specific requirement to play traditional jazz. However, Radio 2 does have a requirement to play music which appeals to a wide range of age groups and as one of the few popular music stations catering for over 65 year olds Radio 2 has a particular responsibility to ensure that this age group are satisfied with its music selection.

⁹ Because these figures are expressed as a percentage of the population they take into account fluctuations in population groups so they already reflect the fact that the population has aged

¹⁰ The BBC's 'Pulse' audience survey indicates that type of music is the most popular reason for listening to Radio 2, followed by presenters.

Recommendation

Radio 2's remit is to appeal to all age groups over 35. The Trust is sympathetic towards commercial radio's concern that Radio 2's audience has become younger. However, we do not believe that growth of the 35-44 year old audience should be reversed because this age group falls within the remit of Radio 2 and the percentage of 35-44 year olds reached is lower than average for Radio 2's target audience.

The Executive should seek to reduce the percentage of Radio 2's audience which falls outside the target audience although we recognise that some younger listeners are inevitable as an individual's taste in radio is not always clearly defined by their age.

Radio 2 should investigate reasons for the decline in audience among over 65 year olds and, in particular, over 75 year olds with the aim of addressing this decline. In doing so, the station should consider whether its range of music continues to meet this audience's expectations.

Over the past five years the average age of the station's audience has remained stable. We anticipate that in the short term the age profile may fluctuate following recent presenter changes, but Radio 2 should ensure that the average age of its audience does not fall below 50 for any sustained period without corrective action. We will track Radio 2's average age through our quarterly performance assessments and will report publicly on the station's performance in future Annual Reports.

Quality

Listeners generally believe that Radio 2 offers high quality programming

61. Consultation responses indicate that many listeners hold Radio 2 in high regard. This is consistent with the results of audience perception surveys which the BBC uses to monitor quality. Radio 2's approval scores in these surveys have remained stable over the past five years, with an average score of 8 out of 10. This is slightly below Radio 4 but above Radio 1 and above the highest scoring commercial station. Quality is also measured through an audience appreciation index. Radio 2 has an average Appreciation Index score of 81 out of 100¹¹ which is above average for BBC Radio.
62. The station also scores well for characteristics considered by Ofcom to be features of public service broadcasting (PSB) such as 'high quality', 'innovative', 'challenging' and 'engaging'. Radio 2's service licence specifies that its programmes should exhibit some or all of these characteristics, which are measured by asking a representative sample of listeners whether they agree with statements about BBC stations and a comparable commercial radio station. Radio 2's results indicate that the station scores better for 'high

¹¹ BBC Pulse survey 2008-09

quality' and 'engaging' than 'innovative' and 'challenging', which is consistent with Radio 2's role as an entertainment station (Figure 7).

Figure 7: Audience perceptions of Radio 2 and a commercial comparator

	Average score*		% Agree strongly**	
	Radio 2	Commercial comparator	Radio 2	Commercial comparator
<i>High quality</i> - "It has well made high quality programmes/ content"	7.3	6.3	53	25
<i>Innovative</i> - "It has programmes/ content with new ideas and different approaches"	6.3	6.0	30	21
<i>Challenging</i> - "It has programmes that make me think"	6.3	5.6	32	19
<i>Engaging</i> - "It has programmes/ content that I want to listen to"	7.1	6.3	47	31

Source: Quality & Impact Survey. BBC Management 2008 averages.

* Average score out of 10.

** Percentage scoring 8 or more out of 10

63. Independent audience research carried out by the Trust is consistent with these BBC survey scores. Some 64 per cent of adult listeners gave the station an approval score of 8 or more out of 10¹². This is significantly higher than the proportion of licence fee payers who approve highly of the BBC as whole, some 42 per cent in 2009.

The Executive has developed new compliance procedures following some high profile editorial compliance breaches

64. In October 2008 the Trust asked the Executive to develop plans to strengthen the BBC's Audio & Music editorial compliance processes following a high profile breach made during *The Russell Brand Show*, when Russell Brand and Jonathan Ross made prank telephone calls to Andrew Sachs. Since then, several new appointments have been made including a full-time Head of Editorial Standards for Audio & Music and a new full-time Compliance Editor for Radio 2 and 6 Music. The BBC Audio & Music department has also developed new compliance procedures as set out in Figure 8. In September 2009 the Trust began a review to assess the effectiveness of the measures taken by the Executive and we plan to publish our findings in March 2010.

¹² Only 6 per cent were low approvers giving the station a score of 1 – 4 out of 10 (BMRB)

Figure 8: Plans to strengthen Audio & Music compliance procedures

All independent producers must now:

- have a named BBC staff member responsible for each production, named in contract
- have a named person responsible for delivering a compliant programme, named in contract
- conform to BBC 'Talent/Exec Producer' policy.

New job descriptions have been issued to all production staff which set out their compliance responsibilities.

All programmes, both in-house and independent, now have a senior editorial figure (Executive Producer or Editor) in charge of them, resulting in the appointment of three new Executive Producers for Radio 2 and 6 Music.

A new High Risk list is now discussed at a weekly controllers' meeting, where the identification of risk and mitigating actions are discussed.

The completion of a compliance form and 'second listen' by a senior editorial figure are now strictly enforced. Statistics are reported to the Audio & Music board on a monthly basis and action taken against people who have not followed processes.

The recommendations from the Taste and Standards report relating to Audio & Music have been communicated at six London sessions and four regional sessions.

A new mandatory Creative Leadership course for senior editorial figures has been introduced.

Preparations for a 'Visualisation of Radio' course are being made to highlight editorial issues around pictures.

New Executive Producer-Editor forum meetings have been introduced.

Impact

Radio 2 is meeting its service licence conditions

65. The Trust measures impact by considering how well a service delivers the BBC's public purposes, the BBC's Charter requirements concerning citizenship, diversity, learning, creativity, media literacy and bringing the world to the UK. These requirements are summarised in Figure 1.
66. Radio 2 is required to make a contribution to each of the public purposes by meeting conditions which are set out in the station's service licence. In 2008-09 Radio 2 met all these conditions, details of which are set out in Figure 9 below.

Figure 9: Radio 2's performance against service licence conditions

	Commitment	Performance
<i>Creativity</i>		
Percentage of music in daytime from UK acts	40%	50%
Percentage of music in daytime that is new	20%	25%
Hours of live music broadcast each year	260	268
Hours of specialist music programmes broadcast each year	More than 1,100	1,199
Hours of arts programming broadcast each year	More than 100	103
Contribute to BBC radio commitment to commission at least 10 per cent of eligible hours of output from independent producers.	BBC radio commitment of 10%	16%
<i>Citizenship</i>		
Hours of news and current affairs, including regular news bulletins broadcast each week	16	18
<i>Diversity</i>		
Hours of religious output covering a broad range of faiths broadcast each year	170	188

Source: Performance against Statements of Programme Policy 2008-09

67. The Executive commissions an independent consultancy, Intelligent Media, to monitor its output to check that some service licence conditions are being met. This content analysis would be too expensive to carry out continuously so takes place on a sample basis. Senior management at the BBC are made aware in advance which weeks are chosen for analysis to avoid untypical weeks being chosen (such as Glastonbury or a Michael Jackson tribute). This information is not, however, communicated to staff.
68. Given the importance of ensuring that the station is not altering its approach in content analysis weeks, we compared the Radio 2 playlists of weeks chosen in 2008-09 to a random sample of other weeks during the year and found that there was no significant difference in the type and origin (e.g. UK) of the music played. This gave us assurance that the content analysis weeks gave a fair reflection of the station's musical output for the year.

Commercial radio stations have suggested Radio 2's service licence conditions are too imprecise

69. Submissions from commercial radio stations, including RadioCentre have argued that Radio 2's service licence conditions are too open to interpretation and have suggested a number of amendments to enhance Radio 2's contribution to the BBC's public purposes. These suggestions are set out alongside the Trust response in Figure 10.

Figure 10: Trust response to RadioCentre suggested amendments to Radio 2's service licence conditions

RadioCentre proposal	Trust response
The service licence should clearly define whether music conditions are measured by number of plays or different tracks played.	We agree that this is an important distinction. Conditions for UK music and new music are based on the percentage of total plays not the percentage of different tracks ¹³ . This means that if the same song is played ten times each of these plays will contribute towards these conditions. Plays are used rather than tracks because this more accurately reflects the listener's experience of the station. We will amend the service licence to be clear that these conditions relate to plays not tracks. Using plays rather than tracks means that Radio 2 could potentially satisfy its conditions without playing a wide variety of new or UK tracks. However, as set out in paragraphs 91 and 92, Radio 2 has a relatively low song rotation rate and currently satisfies its service licence requirement to play a broader range of music than other stations.
Music quotas should be monthly rather than annual.	We believe that an annual target is appropriate because of the seasonality of new releases (for instance a greater number in the autumn anticipating Christmas sales).
Radio 2 should play at least 15 per cent but no more than 25 per cent new music to avoid over emphasising new music in its daytime schedules.	The existing condition is 20 per cent or more. We believe that applying a tighter restraint would limit the creative flexibility of the station without offering additional value to the audience. For example, revising this condition could restrict Radio 2's ability to introduce new specialist music such as country, folk or orchestral arrangements. It will however be important to ensure that this new music is distinctive from that being played by the commercial sector. This issue is addressed in recommendation 4a.
60 per cent of Radio 2's output should be more than 20 years old to encourage the station to focus on an older audience.	As set out in recommendation 2a we have tasked management with protecting Radio 2's appeal to older listeners. However we feel that an era based condition of this sort would be too arbitrary and restrictive over the life of the service licence (some music less than 20 years old may hold particular appeal for older listeners). We would rather give management the flexibility to decide how best to deliver the ambition set out in recommendation 2a and will hold them to account for doing so.
Radio 2 should increase its commitment to UK music to 50 per cent.	We believe that the existing condition of 40 per cent already demonstrates Radio 2's commitment to UK music and feel that increasing this condition increases the risk that programming decisions are led by origin of artist rather than creative merit.
Radio 2 should ensure at least 25 per cent of output each week is speech based.	Radio 2's speech content makes an important contribution to the BBC's public purposes but establishing a percentage condition for speech would not necessarily safeguard its quality. We believe that it would be more effective to measure the impact Radio 2's output is having on the audience. The Trust is working with the Executive to develop plans to monitor audience perception of public purpose delivery at a service level possibly using a similar approach to the research carried out in this review.

¹³ 'Tracks' refers to the total number of different titles, irrespective of the number of times each is played; and 'Plays' refers to the total number of songs played including multiple plays of an individual title. They are linked by Rotation Rate, which indicates on average how often an individual title is played and is calculated by dividing Plays by Tracks.

Radio 2 should broadcast at least 50 new documentaries each year of personal, social, financial, health and educational relevance.

Much of the subject matter suggested by RadioCentre would overlap with material already broadcast on Radio 4. However, we agree that Radio 2's documentary output should be safeguarded by a service licence condition and will amend the service licence accordingly.

Radio 2 should have a condition to offer a continuous programme of social action campaigns.

Radio 2's service licence already requires the station to carry out social action campaigns. In recommendation 1a we set out plans to make these campaigns more ambitious but do not believe the suggested amendment would help us achieve this. A continuous programme could limit the impact of campaigns which is built around their special nature.

Source: RadioCentre submission and Trust response

Recommendation

To safeguard Radio 2's delivery of the public purposes we will amend the service licence conditions to:

- be clear that UK and new music conditions relate to the number of plays rather than different tracks played¹⁴
- introduce a condition to safeguard Radio 2's documentary output. The station will be required to broadcast at least 130 hours of documentaries each year.

We carried out audience research to establish whether listeners feel Radio 2 is delivering the BBC's public purposes

70. The Executive uses Intelligent Media to monitor what proportion of Radio 2's output is speech and consider what proportion of this speech content is contributing towards the BBC's public purposes. Analysis carried out in May 2009 indicated that around half of Radio 2's output is speech and that this speech could be attributed to the purposes set out in Figure 11.

¹⁴ 'Tracks' refers to the total number of different titles, irrespective of the number of times each is played; and 'Plays' refers to the total number of songs played including multiple plays of an individual title.

Figure 11: Percentage of Radio 2 speech content in daytime attributed to the BBC's public purposes

Purpose	Proportion of speech output attributed to purpose
Citizenship	31.9%
Education	4.8%
Creativity	30.5%
Diversity	14.9%
Global	-
Digital	0.2%
Other	17.7%

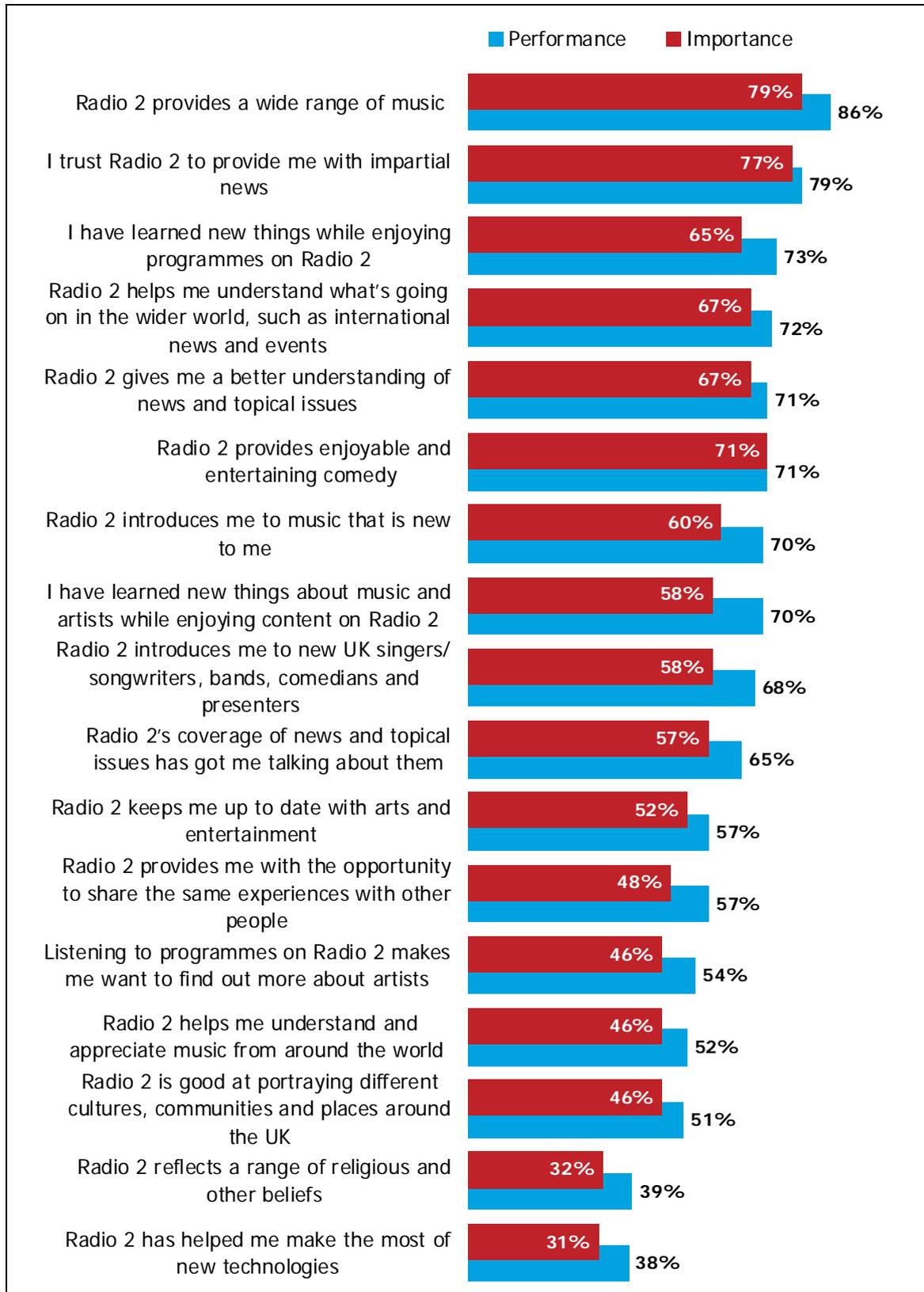
Source: Intelligent Media speech analysis

71. Figure 11 indicates that the majority of Radio 2's speech output contributes to the BBC's public purposes and gives us an indication of where this output is focused. This analysis is highly subjective, however, and does not tell us what impact this speech is having on the audience.
72. To better understand Radio 2's impact on the audience we carried out a survey among a representative sample of Radio 2 listeners. Using Radio 2's service licence we developed a range of statements which set out how Radio 2 is supposed to contribute to the purposes, such as 'Radio 2 provides me with a wide range of music'. For each of these statements we asked listeners whether that particular aim was important and how well Radio 2 was performing against that aim. We compared the percentage of respondents who felt an aim was important to the percentage of listeners who agreed that Radio 2 was successfully meeting that aim. This gave us a sense of whether Radio 2 was meeting audience expectations or whether there were 'purpose gaps' where performance was lower than importance.

Our research indicates that Radio 2 is meeting audience expectations for delivery of the BBC's public purposes

73. Our research methodology is used in the Trust's regular pan-BBC Purpose Remit Survey, which in the past has identified performance gaps for the BBC as a whole, relating to the creativity and diversity purposes. However in our research on Radio 2, performance exceeded importance for each purpose, indicating that the station is meeting audience expectations. The results are set out in Figure 12 which shows the performance and importance scores for each statement.

Figure 12: Performance and importance scores for Radio 2's public purpose aims



Source: BMRB audience research 2009

Radio 2 performs particularly well for statements relating to music, news and current affairs

74. Radio 2's service licence requires the station to make a significant contribution to the musical life of the UK and our research indicates that the station is meeting this requirement. It does this by playing a wide range of popular music with a music policy based on the following aims: excellence (of song and performance); melody; accessibility; and breadth.
75. Radio 2 produces over 1,100 hours of specialist music programmes each year covering genres such as country, jazz, folk, rhythm and blues, organ and brass band music. The station supports new song writing and live performance from both new and established artists, particularly those from the UK. Live music is delivered through sessions, orchestral activity, musical theatre, festivals and workshops.
76. Radio 2's contribution to news and current affairs is also strong. Six million people listen to Radio 2 news and no other BBC radio news. The station secures a large audience for current affairs through *The Jeremy Vine Show* on weekday afternoons. This show secures a significant number of listeners from lower income households a demographic which the BBC often has difficulty reaching with its other current affairs output.
77. In its submission to our review RadioCentre argued that Radio 2 had failed to meet its 16 hours a week service licence condition for news and current affairs. RadioCentre drew on analysis carried out by Guardian Media Group which monitored Radio 2's output over a week and suggested that the station could only have met its service licence condition by including what RadioCentre describe as soft news. Examples given included reading stories from national and local newspapers, or interviews/discussions about snoring and a Monopoly Championship.
78. As set out in Figure 9, Radio 2 is meeting its service licence condition relating to news and current affairs. This is an hours-based condition which is monitored by adding together: news summaries, bulletins and headlines; travel news; sport news; business news; and 60 per cent of *The Jeremy Vine Show*. This show aims to deliver current affairs content in an accessible way by mixing more challenging topics with lighter content. Our research clearly shows that on the whole this output is performing well and meeting audience expectations.

Radio 2 performs less well for statements relating to the digital and diversity purposes

79. Radio 2 performs least well for the following three statements which relate to the digital and diversity purposes, although it is important to remember that even for these statements performance exceeded importance indicating that audience expectations are being met:
 - Radio 2 has helped me make the most of new technologies
 - Radio 2 is good at portraying different cultures, communities and places around the UK
 - Radio 2 reflects a range of religious and other beliefs.

80. Radio 2's performance against the first of these statements is consistent with data on usage set out in paragraphs 37 - 41 which shows that Radio 2 has been less successful than other BBC stations at encouraging its audience to listen digitally or go online. This issue is addressed in recommendation 1c. Performance against the second statement is consistent with the demographic profile of the station which shows that ethnic minorities, lower income listeners, people in Northern Ireland and, to a lesser extent, women are less likely to listen to Radio 2. This issue is dealt with in paragraphs 42 - 50 and recommendation 2b. Lower performance against the last of these three statements, 'Radio 2 reflects a range of religious and other beliefs', is less consistent with other information sources.
81. Radio 2 makes a significant contribution to the total audience for religious output on BBC radio. Without it, 55 per cent of the total 11.4 million audience for BBC radio's religious content would be lost. In its submission to our consultation, RadioCentre suggested that Radio 2's religious output is almost entirely focused on Christian output and does not represent a broad range of faiths. However, this perspective does not correspond with our own analysis of Radio 2's religious output nor was it an issue raised by licence fee payers in our public consultation. The station regularly runs a *Faith in the World* week which systematically covers the major non-Christian faiths and *Pause For Thought* and *Good Morning Sunday* both include contributions from non-Christians as a designated element.

Radio 2's comedy and arts programming could be delivered with greater impact

82. Taken as a whole, Radio 2's audience believes that performance meets importance for the statement, 'Radio 2 provides enjoyable and entertaining comedy' but performance varies between different sections of the audience. We analysed performance broken down by demographic group and found that men, listeners in Northern Ireland, listeners in Wales, listeners from lower income households, 15-34 year olds and over 65 year olds gave Radio 2 a lower performance than importance score in this area, creating a gap in expectations.
83. Radio 2 delivers comedy through presenters like Alan Carr, Paul O'Grady and Jonathan Ross but also invests a significant amount in built programming such as *The Comedy Hour*. This content has among the highest cost per hour of Radio 2 content. In April 2009, however, *The Comedy Hour* was moved from Saturday lunchtime to Thursday evenings, making it more marginal in the schedule.
84. Comedy has the potential to be one of the aspects of Radio 2 which sets it apart from other stations, but some Radio 2 output is similar in tone and substance to that provided on Radio 4¹⁵. To justify Radio 2's investment in this genre it is important to ensure that Radio 2 comedy offers something different to that which is available elsewhere.

¹⁵ In response to our audience research 43 per cent of listeners thought that comedy output could not easily be replaced by other radio stations. This is a lower score than for most other Radio 2 programmes.

85. We have discussed the prospect of strengthening comedy output with the Executive and agreed that it would be helpful to set up a BBC comedy network that includes BBC radio stations as well as BBC Vision (who are responsible for BBC television output) and BBC Worldwide (who are responsible for generating commercial income from BBC assets). This would provide a co-ordinated approach to commissioning which would help to differentiate comedy on different services. It would also help to identify talent, new formats and partnerships.
86. We have also discussed arts programming which, like comedy, requires a significant investment but currently sits at the periphery of Radio 2's schedule. The Executive has engaged a working group to consider scheduling, content and use of on-demand services around arts programming to enhance this genre's impact.

Recommendation

Radio 2 should refresh its comedy output and consider how best to schedule it to gain greater impact from existing levels of investment in this genre. The station should also ensure that Radio 2 comedy is better differentiated from comedy on Radio 4.

We welcome Radio 2's plans to set up a BBC-wide comedy network to help achieve this by providing a more co-ordinated approach to commissioning.

We also welcome plans to enhance the impact of arts programming through scheduling, editorial content and greater use of on-demand services.

Our research indicates that the station offers something more than that which is available on commercial radio stations

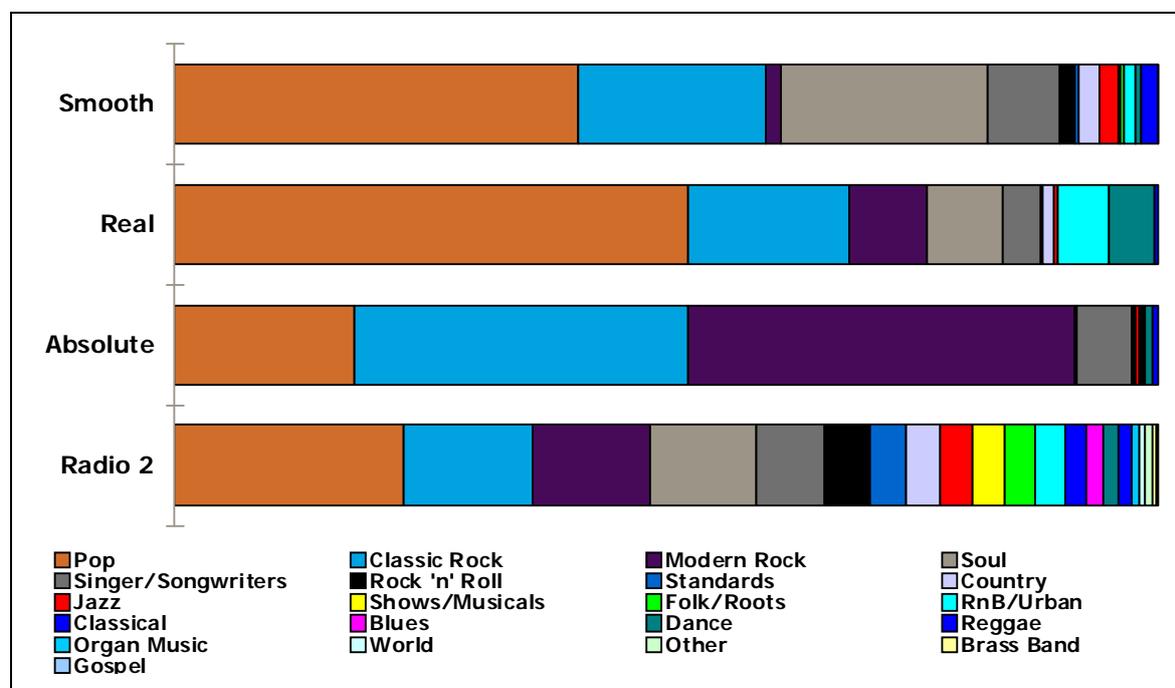
87. Radio 2's service licence requires the station to be distinctive but RadioCentre has raised concerns that Radio 2 is too similar to commercial stations. This issue is important as licence fee funding can only be justified if Radio 2 provides the listener with something which cannot be heard elsewhere.
88. In our survey, some 80 per cent of listeners said they would be likely to miss Radio 2 if it no longer existed. We asked respondents to tell us which other radio stations they listened to in addition to Radio 2. Those who listened to both Radio 2 and other stations were also asked which stations they would miss if they were no longer there. Respondents who listened to both Radio 2 and commercial radio stations were more likely to say that they would miss Radio 2 than the competitor station.
89. To better understand which programmes Radio 2 listeners think are distinctive we asked respondents whether the Radio 2 programmes they had listened to could easily be replaced by another station. We found that 80 per cent of listeners felt that Radio 2 offered something that could not easily be replaced.
90. Using the public purpose aims set out in Figure 12, we also asked those who listen to Radio 2 and commercial stations which stations were good at fulfilling the public

purposes. For each statement, respondents were more likely¹⁶ to feel that Radio 2 was good at fulfilling that requirement than commercial radio stations. This is to be expected given that commercial radio is not required to deliver the BBC's public purposes. Nevertheless, it is important to note that Radio 2 offers something more than that which is available on other stations.

Radio 2 plays a wider range of music than comparable radio stations

91. Radio 2's service licence requires it to broadcast a broader range of music than any other major UK radio station. Performance is monitored through content analysis carried out by Intelligent Media and, like our audience research, this analysis indicates that Radio 2 provides something different to other radio stations, in this case, a more diverse selection of music (Figure 13).

Figure 13: Radio 2's genre mix compared to other radio stations. Proportion of songs played.



Source: Intelligent Media/ BBC Management. November 2008. Songs played.

92. The diversity of Radio 2's music is further demonstrated by comparing the station's song rotation rate¹⁷ with commercial radio stations. Analysis indicates that Radio 2 repeats songs on average 1.3 times a week¹⁸. This is significantly lower than the average rotation rate for comparable radio stations which is around 4.9 a week.

¹⁶ On average more than twice as likely

¹⁷ The Rotation Rate indicates on average how often an individual title is played.

¹⁸ Source: Intelligent Media content analysis 2008-09

Radio 2 plays different songs to other radio stations

93. Content analysis also indicates that listeners can hear different songs on Radio 2 to those played by other radio stations. Figure 14 shows that there is very little overlap between songs played on Radio 2, 6 Music, and Radio 1 in a typical week. This is co-ordinated through a popular music network involving staff from Radio 1, Radio 2 and 6 Music. Figure 14 also shows that there is very little overlap between Radio 2 and individual commercial radio stations. This is true of peak time (i.e. daytime), breakfast and drivetime as well as the week as a whole.

Figure 14: Song overlap between Radio 2 and other radio stations in a typical week

Song overlap	Radio 2 and Radio 1	Radio 2 and 6Music	Radio 2 and closest commercial competitor
All week	3%	4%	10%
Daytime	3%	2%	6%
Breakfast (7-10am)	4%	2%	5%
Drivetime (4-7pm)	5%	1%	5%

Source: Intelligent Media/ BBC Management. Average across four surveys carried out between 2007 and 2008

Radio 2's distinctive choice of music is not currently safeguarded by the Executive's performance monitoring procedures

94. The low level of song overlap between Radio 1, Radio 2, 6 Music and commercial radio indicates that music selection is well coordinated between the three BBC stations. However, the level of overlap is not currently monitored through the Executive's routine performance measurement reports. In particular, all three stations have a requirement to play new music but there is no performance indicator to help ensure that each station plays different new music in keeping with the stations' different remits and target groups.

Recommendation

The Trust believes that distinctiveness and differentiation between BBC services is of critical importance. Therefore, we will amend the Radio 2 and 6 Music service licences to emphasise the importance of minimising song overlap between these two stations and between these stations, Radio 1 and commercial radio.

The Executive should incorporate song overlap into its regular performance reports to ensure that levels of overlap in daytime remain at their current low level. The Executive should also introduce monitoring of levels of overlap for new music played on Radio 1, Radio 2 and 6 Music to help ensure that these stations offer listeners a distinctive range of new releases in keeping with their different remits.

Using off-peak content in peak time would enhance Radio 2's delivery of the public purposes

95. Some commercial radio stations have suggested that Radio 2 satisfies its public service obligations through its evening (off-peak)¹⁹ programming when audiences are lower and that in daytime (peak) the station produces content which is very similar to commercial radio and competes directly for audience share without adding public value. We believe that the relationship between peak and off-peak content is more complex:
- Radio 2 is an entertainment station and entertainment forms part of the BBC's mission. As well as being an important part of the BBC's creativity public purpose, it is through entertainment that Radio 2 delivers the other public purposes
 - winning audiences through entertaining popular content puts Radio 2 in a strong position to drive audiences to less popular public service content in peak time, such as news bulletins and current affairs which could otherwise struggle to win a large audience
 - of the 13.3 million adults who listen to Radio 2 in an average week, 53 per cent (7.1m) tune in off-peak. This percentage split is similar for other radio stations even though audience levels vary between stations. This indicates that there is a relationship between peak and off-peak listening such that as the peak time audience increases so does the off-peak audience. This is consistent with our consultation responses which suggest that many people tend to build a relationship with the station and stay tuned throughout the schedule. This means that winning audience in peak drives audience to off-peak content.
96. Nevertheless, we feel that there could be some benefit from using off-peak content in peak time to enhance delivery of the public purposes. As part of our audience research we compared performance scores for each of the purpose requirements between those

¹⁹ Peak time on the radio is considered to be from 6 am -- 6 pm on weekdays and from 8 am - 2 pm on weekends.

who listened to off-peak content and those who listened in peak time only. Those who listened off-peak gave Radio 2 higher scores on average for each public purpose apart from citizenship.

Recommendation

Radio 2 should enhance delivery of the BBC's public purposes by further integrating peak and off-peak content. We have discussed this ambition with Radio 2 management who have responded with plans to:

- take extracts from off-peak content such as comedy, the arts and documentaries and repackage them so they are suitable for peak time
- consider how to use the 7 pm slot on Radio 2, which inherits a significant audience from peak time, to increase the prominence of some of Radio 2's more ambitious public purpose content
- adopt a more ambitious approach to Radio 2 social action campaigns. These campaigns will seek to bring cultural as well as social benefits and will be delivered through a wider range of programmes in the peak time schedule to achieve greater impact and reach a wider audience.

We recognise that a more ambitious approach to the public purposes carries with it a risk that audience levels will fall

97. Radio 2 has an average weekly audience of around 13 million people. Nearly 5 million of these listen to no other BBC radio and around 2 million listen to no other radio at all. Our audience research and content analysis indicate that Radio 2 already offers the licence fee payer a service which is not available elsewhere. However, we believe that Radio 2's scale, alongside the privilege of licence fee funding, presents an opportunity to be more ambitious and make a greater contribution to the BBC's public purposes. The Trust reached a similar conclusion when it reviewed Radio 1 in 2009. We concluded that, given the size of Radio 1's audience, the station had potential to deliver further public value to young people through its speech output.
98. Our ambition is reflected in the recommendations we have made throughout this report, which are intended to make Radio 2 more distinctive. We would like Radio 2 to implement these recommendations whilst respecting the aspects of the station which make it popular. Radio 2 is an entertainment station and it is through creative and entertaining content that Radio 2 should deliver public value. However, while it is vital that the BBC reaches large numbers of people, doing so is not an end in itself for a public service broadcaster and we accept that some loss of audience may be a consequence of a more varied and challenging selection of programmes.

Value for money

Radio 2's large budget has given rise to concerns that the station is inefficient

99. The Trust controls each service's expenditure through service licence budgets. We monitor annual expenditure against these budgets and any over or under spend greater than 10 per cent requires the Trust's approval. Figure 15 compares Radio 2's expenditure with the station's service licence budget and shows that between 2006-07 and 2008-09 Radio 2's expenditure was within this 10 per cent tolerance.
100. In 2008-09 the direct cost of making Radio 2's programmes was £26.7million. To this figure we add centrally allocated costs such as news and collecting society payments for music royalties²⁰ to arrive at the full cost of Radio 2's content, some £40.1million in 2008-09. Collecting society costs are allocated by the BBC across its various services based on BBC management's estimate of the amount incurred by each service. The method of allocation is under review which could lead to changes in Radio 2 and 6 Music's service licence budgets in the future. Content expenditure added to Radio 2's share of distribution, infrastructure and support costs amounted to a total cost to the licence fee payer of £50.7million in 2008-09. This total excludes expenditure on Radio 2's website which falls under the BBC Online service licence²¹.

²⁰ Collecting societies collect royalty payments from various individuals and groups on behalf of rights holders.

²¹ In the past the Executive has not tracked online expenditure for individual radio stations but in 2009-10 Radio 2 online expenditure is expected to be some £670,000

Figure 15: Radio 2 expenditure compared with the station's service licence budget 2006-07 to 2008-09

	2006-07 £,000	2007-08 £,000	2008-09 £,000
Direct programme making expenditure (i)	26,350	24,731	26,668
Centrally allocated programme related expenditure(ii)	11,786	14,776	13,448
Total content expenditure (iii)	38,136	39,507	40,116
<hr/>			
<i>Service Licence budget</i>	<i>37,400</i>	<i>38,500</i>	<i>37,500</i>
<hr/>			
Total content expenditure (iii)	38,136	39,507	40,116
Distribution (iv)	4,200	4,500	3,800
Infrastructure/support (v)	7,800	7,300	6,800
Total	50,136	51,307	50,716

Source: BBC annual reports and management accounts

Notes

- (i) expenditure controlled by the Radio 2 management team
- (ii) this includes costs relating to collecting societies (royalty payments etc.) newsgathering, development, libraries and helplines. audience research and communications
- (iii) this expenditure is monitored against Radio 2's Service Licence budget
- (iv) Radio 2's share of broadcast transmission costs
- (v) Radio 2's share of non-programme specific overheads including non-programme related property, technology, finance, HR, training, legal, marketing (which is controlled centrally), executive management, licence fee collection, governance, sale of assets and restructuring costs

101. RadioCentre has argued that Radio 2's budget is far in excess of the amounts available to commercial radio stations and on this basis has raised concerns over Radio 2's value for money. To assess whether Radio 2 is value for money we:

- asked a representative sample of people whether Radio 2 represented value for the licence fee
- looked at the relationship between Radio 2's cost and performance
- assessed the Executive's progress against plans to make efficiency and talent cost savings.

The majority of licence fee payers believe that Radio 2 represents value for money

102. Radio 2's total cost including its allocation of BBC overheads amounted to around 1.5 per cent of the licence fee or around £2.10 per person in 2008-09. We used an omnibus

survey to ask licence fee payers whether they felt this represented value for money. The vast majority of those who listen to Radio 2, some 92 per cent, and the majority of the population as a whole, some 53 per cent, believe they get value for money for the amount of their licence fee invested in Radio 2.

Radio 2 costs less per listener hour than any other network radio station

103. To assess value for money it is important to consider consumption alongside cost to provide a perspective on cost effectiveness. Figure 16 shows the 'cost per listener hour' for Radio 2 compared with other BBC FM radio stations. This measure draws on cost and usage data to arrive at the average cost for every hour that the audience spends listening to the station. The station's large audience means that it has a lower cost per listener hour than any other BBC radio station.

Figure 16: Radio 2 cost per listener hour compared with other BBC FM stations

	2007-08 Pence	2008-09 Pence
Radio 1	0.6	0.6
Radio 2	0.5	0.5
Radio 3	6.1	6.3
Radio 4	1.3	1.3
Five Live	2.4	2.3

Source: BBC Annual Reports

Radio 2 is taking steps to become more efficient

104. Audience perception and cost per listener hour are not in themselves measures of efficiency. In a report on radio efficiency commissioned by the Trust, the National Audit Office recommended that the BBC carry out work to explain significant cost variations between BBC stations as well as between the BBC and commercial stations. Radio 2 in particular appeared to be expensive compared with other music stations.

105. These variances can be explained in part by differences in the range and quality of Radio 2's offer:

- Radio 2 aims for high quality content throughout the schedule whereas some commercial stations focus their resources on peak time
- Radio 2 provides a wider range of music and speech output than other stations including live music, current affairs, high quality journalism, comedy and documentaries. This content is among the more expensive elements of Radio 2's schedule but is also considered by audiences to be among the most distinctive²², making an important contribution to delivery of the public purposes
- the Executive argues that Radio 2 talent costs are higher than other stations to secure presenters who are able to deliver a broad base of appeal in keeping with the station's remit to attract all listeners over the age of 35.

²² Programmes which listeners felt could not easily be replaced by another station

106. These factors explain some but not all of the cost variances identified by the NAO and Radio 2 has developed plans to make significant efficiency savings over the remaining period of this licence fee settlement. The BBC has a commitment to identify some £1.8billion in efficiency savings between 2007-08 and 2012-13. Around £70million of these savings are due to be delivered by the BBC's Audio & Music department, of which £14million are due from Radio 2 and 6 Music. This means that Radio 2 and 6 Music's share of Audio & Music's efficiency saving targets (20 per cent) is larger than the stations' share of this department's costs (around 16 per cent).
107. Radio 2's savings plans have been informed by work carried out in response to the NAO's recommendations. These recommendations and the BBC's response to date are set out in Figure 17.

Figure 17: The BBC's response to the NAO's recommendations on radio efficiency

NAO Recommendation	Planned implementation date	Progress
<p>The BBC should, in a rolling programme:</p> <ul style="list-style-type: none"> analyse the costs of comparable programmes to highlight areas where there may be scope for further efficiency identify the reasons for cost variations between programmes, establish whether the variations are due to differences in editorial ambition or efficiency and assess the scope for further efficiencies inform guide price ranges for programme genres by analysis of actual cost data. 	<p>February 2010</p>	<p>Consultants Oliver and Olhbaum were commissioned to benchmark programme costs against a predicted price based on key programme characteristics like programme length, number of contributors and production location. This has led to some cost saving measures being implemented such as extending the length of individual programmes to reduce cost per hour.</p> <p>Consultants have also been commissioned to benchmark presenter costs. This review has been used to inform the BBC Audio & Music division's talent strategy.</p> <p>The Executive has carried out a separate exercise reviewing production costs in drama and documentaries across different radio stations using input from BBC production teams and independent suppliers to better understand the reasons behind cost differences and share good practice. On the basis of this work the Executive concluded that most cost variations were due to editorial differences and that guide prices reflect actual costs of production. This review is now being extended to core music programmes.</p>
<p>The BBC should:</p> <ul style="list-style-type: none"> assess and document the likely and actual overall impact of efficiency savings initiatives on each of its public value criteria complete the work that is already underway to confirm indicators and baselines for measuring performance against each of the public value criteria. 	<p>July 2009</p>	<p>The Executive has set baseline levels of performance against which the impact of efficiency savings can be monitored. It has also made an assessment of the likely impact of efficiency plans on performance.</p>
<p>The BBC should use the existing Radio Network (a pan-BBC group of radio executives from across the UK) to identify and spread good practice in radio production efficiency.</p>	<p>April 2009</p>	<p>Radio production efficiency has been included as a standing item at each Radio Network meeting and the Executive has used this forum to share good practice arising from its benchmarking work.</p>
<p>The BBC should explore with commercial radio stations how they might establish benchmarking arrangements to identify where and how savings can be made.</p>	<p>May 2009</p>	<p>The Executive is in discussion with RadioCentre to benchmark costs with commercial radio but these discussions have not progressed in line with the planned implementation date.</p>

Recommendation

The Trust welcomes the progress made by the Executive in response to the NAO's review of radio efficiency. This work has informed the Executive's plans to save some £14million from Radio 2 and 6 Music by 2012-13.

Plans to benchmark costs with commercial radio have progressed more slowly than first anticipated. These plans present an opportunity to make further efficiency savings and should be progressed as fast as possible although we recognise that implementation is not entirely within the Executive's control and is dependent on an agreement being reached with commercial radio.

The Trust will continue to monitor efficiency savings and will report progress against targets through the Annual Report.

108. Presenter costs form a significant part of Radio 2's expenditure. In 2008 the Trust commissioned an independent report into the BBC's role in the on-screen and on-air talent market. The Trust concluded that on the whole the BBC was not paying more for its top talent than other broadcasters were willing to pay but that there was room for improvement in the BBC's practices which could achieve better value for money in some deals. In 2009 we asked the Executive to report on progress. We found that good progress had been made on our recommendations and that the BBC had made some significant savings. However, we also concluded that in the context of the current economic climate the BBC should go further in reducing its overall expenditure on talent and tasked the Executive with achieving further substantial savings during the remainder of this licence fee period.

Recommendation

The Executive should report to the Trust with revised talent cost saving targets for the BBC as a whole, given that the economic climate has worsened since the Trust first reviewed talent costs in 2008.

6 Music findings

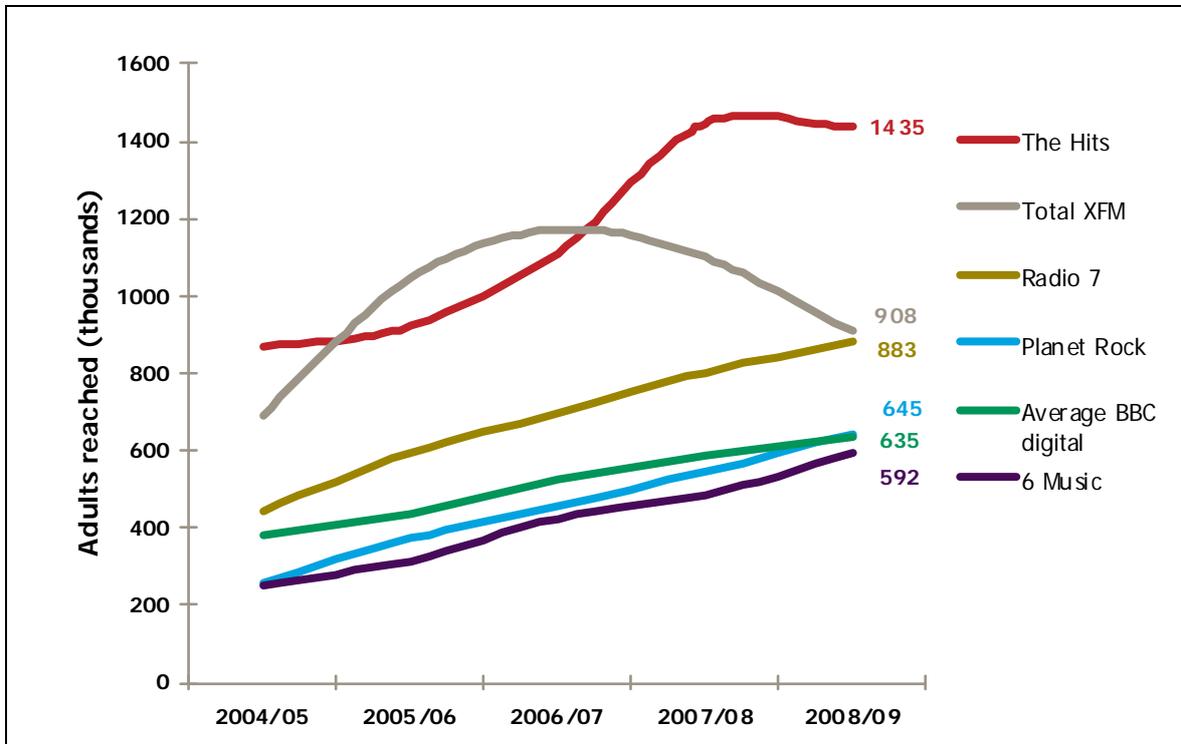
6 Music is well liked by its listeners, although these are relatively few in number. The station must raise awareness and grow its audience to realise its potential. The challenge for 6 Music will be to do this without jeopardising the aspects which set it apart from other services.

Reach

6 Music's audience is growing but the station is reaching only a small percentage of the population

109. Figure 18 shows 6 Music's reach compared with other BBC digital radio services and some commercial digital stations over the past five years. In 2008-09 6 Music reached, on average, around 600,000 adults each week. Over the last four years the station's reach has grown faster than that of any other BBC digital-only radio service but because this growth has been from a relatively low base the station is still only reaching around 1.3 per cent of the adult population. This low reach should be considered in the context of the wider digital radio marketplace, which suffers from a lack of awareness, a preference for listening to existing analogue services via the digital platforms, and the relatively slow take-up of DAB radio sets, particularly in cars. The Trust's Audience Councils in both England and Wales emphasised that lack of coverage is also a key barrier to listening in many parts of the UK. 6 Music's performance should therefore be compared with other digital radio stations.

Figure 18: Adult population reached by 6 Music and other digital radio stations (thousands)



Source: RAJAR. Average weekly reach

6 Music attracts a relatively high number of on-demand listeners

110. These reach figures are based on industry standard RAJAR data which does not include on-demand listening. 6 Music attracts the second highest number of requests to listen on-demand among the BBC’s digital radio stations. Around 50,000 6 Music podcasts are downloaded each week and the station has around 70,000 weekly requests for on-demand content through the BBC’s iPlayer²³. It is not possible to tell to what extent on-demand listening expands 6 Music’s overall audience because we do not know whether the people listening on-demand are the same as those who listen to original broadcasts. However, the numbers involved, although significant, would not yet have a large impact in absolute terms on overall reach.

Online listening is popular but website usage as a whole is relatively low

111. 6 Music attracted the highest volume of live streamed listening among the BBC’s digital radio stations in 2008-09, an average of 408,000 hours per month, but website usage as a whole is relatively low in absolute terms. In 2008-09 the 6 Music website received, on average, 65,000 users per week, slightly fewer than the previous year and slightly lower than BBC Radio 7 and 1Xtra.

²³ Based on Q1 2009. BBC management is currently developing a new measurement system which will measure usage of a service across all platforms and will better reflect the reach of digital services like 6 Music.

6 Music listeners tend to be committed to the station but very few listeners tune in to 6 Music and no other BBC station

112. 6 Music has the highest average hours of listening of the BBC's five digital-only radio stations, indicating that those who do listen tend to be committed to the station. However, 6 Music is typically used as part of a portfolio of stations rather than being the only one people listen to. Almost half of 6 Music's listeners also listen to Radio 2 and only 10 per cent of listeners listen to 6 Music and no other BBC station.

Low reach is compounded by low awareness

113. We carried out an online survey²⁴ to find out why people do not listen to 6 Music. The most common reason was lack of awareness.

114. The BBC monitors what proportion of the adult population is aware of particular radio stations through a regular brand tracker survey. Prompted²⁵ awareness of 6 Music has increased from 14 per cent in 2004-05 to around 20 per cent in 2008-09. This level of awareness is in line with the average for BBC digital radio stations but is low in absolute terms. Low awareness was also an issue raised by our Audience Councils, who suggested the BBC should do more to promote 6 Music to the licence fee payer.

115. 6 Music carried out a promotional campaign on television in early 2009 but there has not been a significant increase in awareness or reach since then. The Executive has concluded that the campaign had limited impact because the station lacked a clear brand identity and because isolated campaigns are likely to be less successful than sustained promotion.

During this review the Executive has developed plans to boost awareness of 6 Music and grow reach

116. During this review the station has developed a more clearly focused brand identity. This process was given impetus by the appointment of a new station controller in January 2009. The Executive has positioned the station as 'a community that celebrates the alternative spirit in popular music since the 1960s to the present day'. This alternative spirit refers to the thread in music, originating in the late 1960s, when some popular music became more radical and challenging.

²⁴ BBC Pulse 2008-09

²⁵ Survey respondents are prompted with the name of a station.

Recommendation

6 Music has developed a more focused brand identity to help the station promote itself to the audience in a more targeted way.

We will amend the station's service licence to reflect this. The first line of the station's remit will change from:

'The remit of BBC 6 Music is to entertain lovers of popular music with a service offering music from the 1960s to the present day'

to

'The remit of BBC 6 Music is to entertain lovers of popular music with a service that celebrates the alternative spirit in popular music from the 1960s to the present day'.

117. Using this more focused brand identity, the station intends to raise awareness through better co-ordinated press material and cross-promotion with other BBC services. The station also intends to raise awareness through large-scale pan-BBC events such as the Glastonbury Festival. In 2009 6 Music was the lead station for Glastonbury coverage, broadcasting both live events and archive recordings while Radio 1 focused on a limited number of major artists and Radio 2 provided news coverage. Events like this should help promote the station to new listeners and should also help encourage digital radio take-up. Increased take-up would increase the station's potential audience as well as bringing wider benefits for digital radio as a whole.

118. Research carried out by the Executive has improved the station's understanding of its current and potential audience as well as the more general pattern of digital listening. The station's schedule has been developed based on an AM/FM radio model but this research indicates that listening patterns differ on digital stations. For example:

- the potential breakfast and drivetime audience is limited by the relative lack of DAB sets in cars and restrictions on use of the internet
- when people listen as a group they are more likely to choose a general entertainment or familiar service rather than a station with more niche appeal.

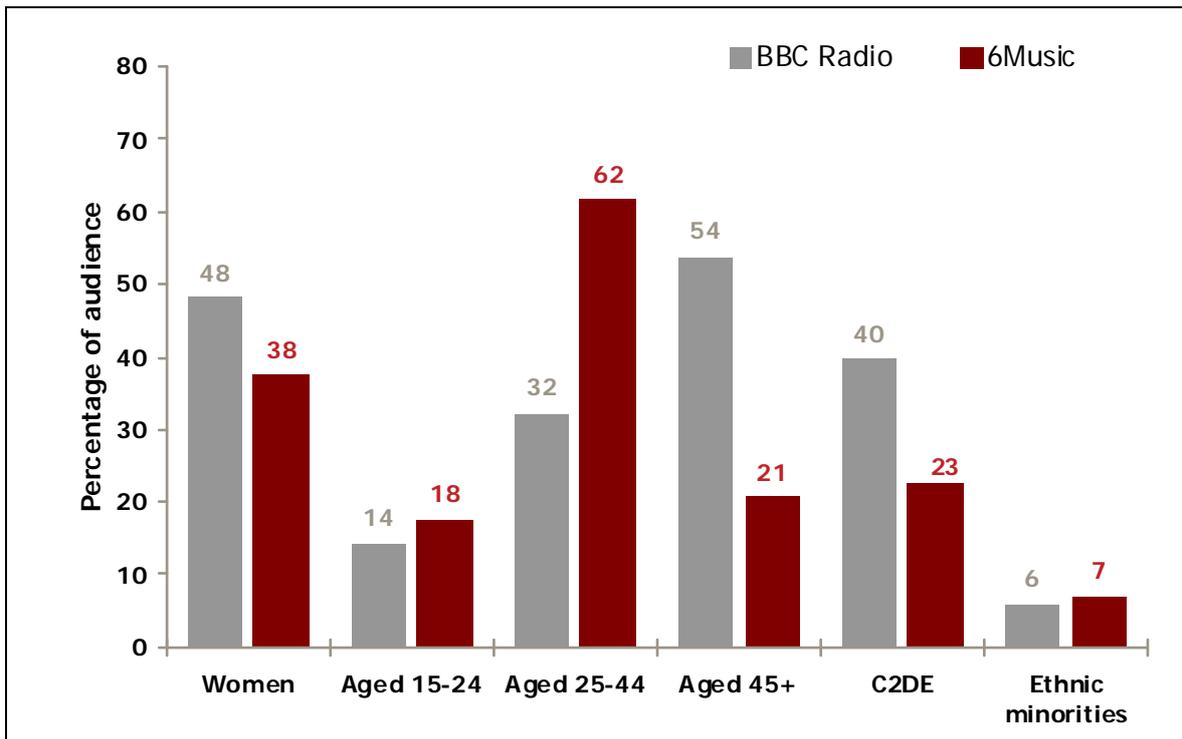
119. On the basis of this research 6 Music intends to focus on times such as early breakfast, evenings and weekends when people have access to digital radio and do not compete with others for control of the radio set.

6 Music is intended to appeal to all lovers of popular music but some demographic groups are more likely to listen than others

120. 6 Music's service licence does not specify a target demographic group but is intended to appeal to all enthusiasts for popular music outside the mainstream since the 1960s. Nevertheless, the station's audience profile suggests that there may be scope to boost the station's appeal among certain demographic groups.

121. Figure 19 compares the demographic breakdown of the station's audience to that of BBC radio as a whole. This analysis indicates that the station has less appeal among older listeners and people from lower income households (C2DEs). The station audience also has a male bias although the proportion of female listeners has increased significantly over the past five years. 6 Music appears to perform slightly better than BBC radio as a whole among ethnic minority groups but audience numbers are still lower than they would be if they reflected the proportion of ethnic minorities in the population as whole.

Figure 19: 6 Music audience profile compared with all BBC radio



Source: RAJAR average weekly reach 2008-09

122. Given that 6 Music plays popular music since the 1960s, the average age of the station's audience is relatively low at 36²⁶. RadioCentre suggested that the station should be repositioned so that it targets over 65s to encourage older audiences to use digital radio. We do not believe that repositioning the station to target over 65 year olds would have a significant impact on digital take-up among this age group. Radio 2 is better suited to this task, given its familiar presenters, its large audience and its intergenerational appeal. Nevertheless we agree that the station should appeal to as broad an age range as possible and has a responsibility to attract listeners to digital radio.

²⁶ Using adults aged 15+ as the base

Recommendation

6 Music's audience is growing but the station is still reaching only a small percentage of the population and there are relatively few visitors to its website. To realise its potential the station must raise awareness and increase its reach.

6 Music is intended to appeal to all enthusiasts for popular music outside the mainstream since the 1960s. However, the station currently appeals less to older people, to listeners from lower income households, to women and to ethnic minorities. The station should increase its appeal to alternative popular music enthusiasts from groups which are currently less likely to listen. In particular the station should seek to attract older listeners, given that the average age of its audience is 36.

During the course of this review, the Executive has developed plans to grow reach and the Trust will track progress over the coming months.

Quality

Although audience levels are low, those who do listen tend to have a favourable overall impression of the station

123. The BBC's routine audience approval surveys do not cover digital radio stations, because audience numbers are too low to produce robust sample sizes. However, our consultation responses indicate that most of those who do listen tend to think highly of 6 Music. These responses are consistent with our audience research which indicates that 62 per cent of listeners gave the station a score of 8 or more out of 10 for the question: 'Thinking about 6 Music generally, what is your overall impression on a scale of 1 to 10, where 1 means extremely unfavourable and 10 means extremely favourable?' Only 3 per cent of listeners gave the station a score between 1 and 4.

124. The station is also well regarded by the radio industry. In March 2009, 6 Music received 11 nominations for Sony awards, more than Radio 1, Radio 2 or Radio 3 and more than the rest of the BBC digital stations combined.

While listeners tend to have a favourable overall impression of the station, scores for key quality measures tend to be lower than for comparable digital radio stations

125. While listeners tend to be favourable towards the station, scores for key quality characteristics considered by Ofcom to be features of good public service broadcasting are not so encouraging. As for Radio 2, these characteristics are measured by asking a representative sample of listeners whether they agree with statements about the BBC station and a comparable commercial radio station. 6 Music survey results indicate that the station is perceived to be less engaging and of lower quality than its comparator (Figure 20).

Figure 20: Audience perceptions of 6 Music and a commercial comparator

	Average score*		% Agree strongly**	
	6 Music	Commercial comparator	6 Music	Commercial comparator
<i>High quality</i> - "It has well made high quality programmes/ content"	6.6	7	35	43
<i>Innovative</i> - "It has programmes/ content with new ideas and different approaches"	6.2	6.2	30	28
<i>Challenging</i> - "It has programmes that make me think"	5.4	5.2	16	18
<i>Engaging</i> - "It has programmes/ content that I want to listen to"	6.5	7.2	52	33

Source: Quality & Impact Survey. BBC Management 2008 averages.

* Average score out of 10

** Percentage scoring 8 or more out of 10

126. Quality scores for the 6 Music website as monitored by the Netpromoter survey are also consistently lower than those for other BBC digital radio stations. The Netpromoter survey asks whether users are likely to recommend a website to others. These low scores are consistent with the low usage rates which are set out in paragraph 112.

Recommendation

BBC research indicates that 6 Music listeners are less likely to describe the station as 'high quality' and 'engaging', or to recommend the website to a friend than listeners to comparable digital radio stations. This is surprising given that listeners tend to have a favourable overall impression of the station. Management should establish whether existing measures present an accurate picture of 6 Music's performance and if so should develop plans to improve the station's performance in these areas. The Executive should report its conclusions to the Trust in spring 2010.

Impact

6 Music is meeting its service licence conditions but commercial radio has raised concerns that these conditions are not sufficiently challenging

127. Like Radio 2, 6 Music is required to make a contribution to delivery of each of the BBC's public purposes by meeting conditions which are set out in the station's service licence. 6 Music's performance against each of these conditions is set out in Figure 21 below.

Figure 21: 6 Music’s performance against service licence conditions

	Commitment	Actual
<i>Creativity</i>		
Percentage of music played each year that is more than four years old	50%	55%
Number of hours of archive concert performances each year	400	486
Percentage of music that is concert tracks and sessions from the BBC’s archive	15%	15%
Number of new sessions each year (excluding repeats and acquisitions)	275	330
Contribute to BBC radio commitment to commission at least 10 per cent of eligible hours of output from independent producers.	BBC radio commitment of 10%	16%
<i>Education</i>		
Number of hours of speech-based features, documentaries and essays each week on average across the year	10	12
<i>Citizenship</i>		
Number of hours of news each week	6	6

Source: Performance against Statements of Programme Policy 2008- 09

128. RadioCentre has expressed concern that these conditions give 6 Music the freedom to be too similar to commercial radio stations. One specific area of concern is 6 Music’s use of new music. The station’s remit is to play both current releases and earlier recordings since the 1960s. For this reason, half of the station’s music is required to be more than four years old. RadioCentre has suggested that this condition should be strengthened so that half of the station’s music is more than 10 years old. Both the existing condition and RadioCentre’s suggestion impose a cut-off date that is culturally arbitrary, referring to no clearly definable musical era. However, we agree that the condition should encourage the station to focus more on older music given the station’s responsibility to play music since the 1960s.

Recommendation

6 Music's service licence condition that half of its music should be more than four years old establishes an arbitrary cut off date which refers to no clearly definable musical era. It should be replaced with one that establishes a ceiling on 'new music' defined as either unreleased or less than one month since release date (physical release, not download release). This definition is the same as that used by Radio 2 and can be monitored in the same way.

The ceiling on new music should be set at 30 per cent rather than 50 per cent to reflect 6 Music's responsibility regarding older music.

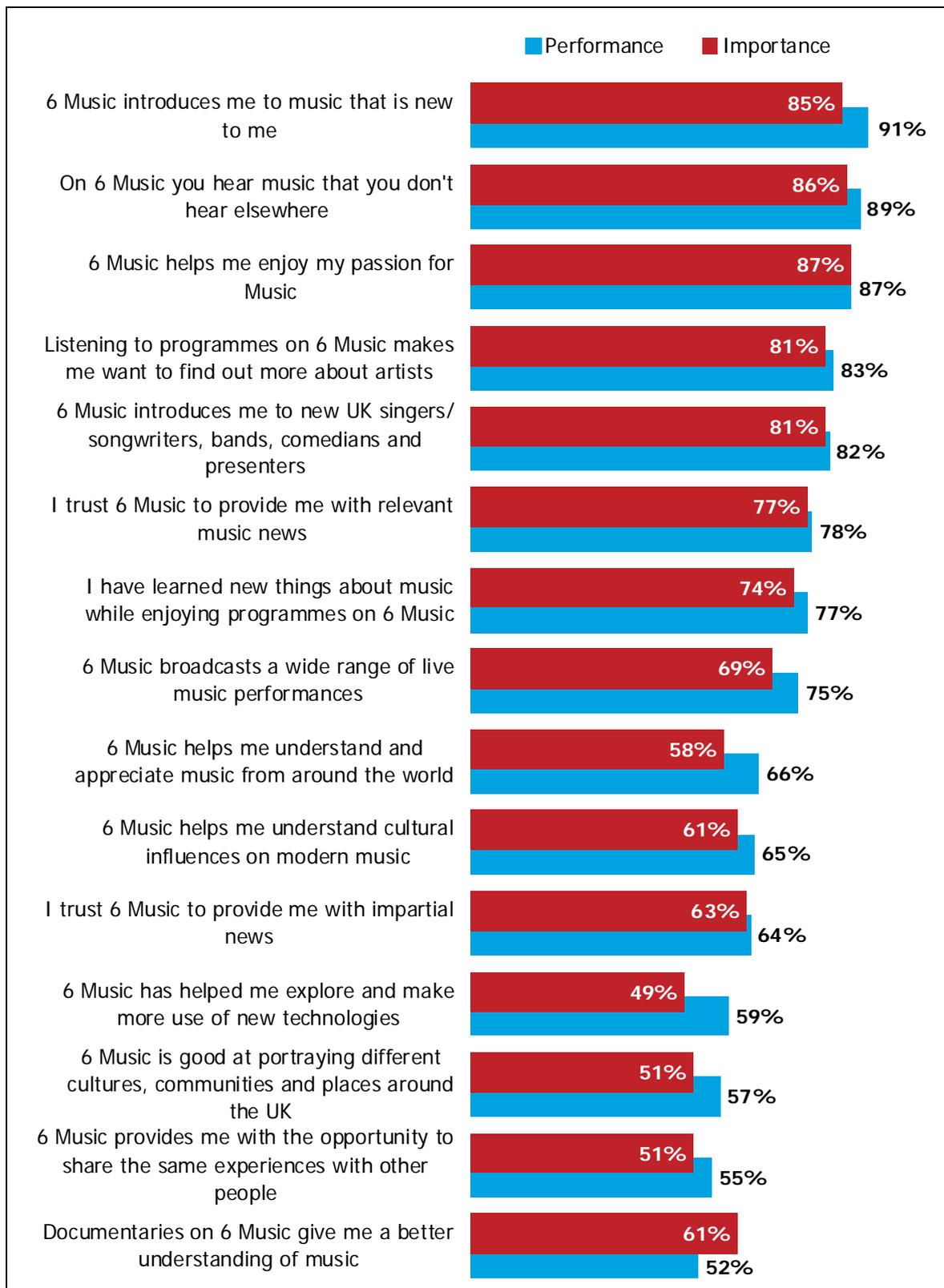
129. RadioCentre has also suggested increasing 6 Music's percentage of archive output from 15 to 25 per cent. The archive is a key component of the 6 Music offer and makes an important contribution to delivery of the public purposes. In particular, archive concerts, sessions and documentaries help to explain musical developments and provide context for more recent music. Usage of archive content is governed by rights agreements. The material dates back as far as the 1960s and since then the relevant legislation and BBC contracts have changed. As a result, there is no single contract which governs use. The station has a series of generic agreements with those thought most likely to own rights, including major record labels, the Musicians' Union and royalty collecting societies. These agreements are being considered as part of a wider pan-BBC review of archive usage which is driven in part by a desire to increase public access. This review is due to be completed later this year and could have significant implications for 6 Music both in terms of the price paid for usage rights and the different outlets the BBC uses to make archive footage available. For this reason we will revisit 6 Music's service licence conditions relating to the archive when the wider archive review is completed.

130. Service licence conditions are important but cannot in themselves guarantee that the station delivers the public purposes because they monitor the type of output broadcast rather than the impact this output is having on the audience. As set out in the Radio 2 section above, we carried out audience research to understand whether listeners felt the public purposes were being delivered and whether they thought that the station offered programmes which were not available elsewhere. The results are set out in the paragraphs below.

Our research indicates that 6 Music makes an important contribution to delivery of the BBC's public purposes

As with Radio 2, we asked listeners whether they agreed with a series of statements relating to 6 Music's public purpose aims. The percentage of listeners who agreed with the statements gave us a sense of how well the station was delivering the public purposes. We also asked listeners to tell us whether they felt the aims were important. The results are set out in Figure 22 which compares the importance scores with performance scores for each statement. 6 Music's high performance scores, particularly for statements relating to music and music news, indicate that listeners feel the station makes an important contribution to delivery of the BBC's public purposes.

Figure 22: Performance and importance scores for 6 Music public purpose aims



Source: BMRB audience research 2009

131. Figure 22 shows that for all but one of the purpose statements performance scores exceed importance indicating that the station is broadly meeting audience expectations. The one exception is the statement 'Documentaries on 6 Music give me a better understanding of music'. This statement received the lowest performance score and importance exceeded performance by 9 percentage points. There are a number of possible factors driving the audience's assessment of this content. Documentaries are scheduled out of peak time and budget constraints mean that 6 Music's documentaries are repeats taken from Radio 1 and Radio 2. Therefore the style, pace, length and presenters of documentaries are not necessarily consistent with 6 Music's tone and may not appeal to the station's audience, which has a different demographic profile to Radio 1 and Radio 2.

Recommendation

6 Music's documentary output is currently not meeting audience expectations. This output is important as it helps the station to meet its service licence obligation to develop an understanding of popular music and its context. Working within the constraints of the station's budget the Executive should seek to address this shortfall.

An increased contribution to the diversity purpose is likely to boost the station's reach outside London

132. Aside from documentaries, the statements with the lowest performance scores related to the diversity purpose, although it is important to note that performance still exceeds importance for these statements, indicating that audience expectations are being met.
133. In recommendation 3a we ask 6 Music to boost the station's appeal to older people, to listeners from lower income households, to women and to ethnic minorities. We also believe there is scope to better reflect musical creativity from different parts of the UK.
134. The station already produces Marc Riley's show in Manchester and in discussions with the Trust has expressed an intention to extend this approach to other parts of the UK to reflect local artists, musical traditions and iconic venues. The station plans to work in partnership with BBC radio in Scotland, Wales, Northern Ireland and across England as well as non-BBC organisations to deliver this content cost effectively.
135. We welcome these plans to make production from around the UK a key characteristic of the station. This is likely to boost its contribution to the diversity purpose and to increase the station's audience outside London.

Our audience research indicates that 6 Music offers something different from that which is available elsewhere

136. We found that some 82 per cent of 6 Music listeners would miss the station if it no longer existed and that people who listened to both 6 Music and commercial radio

stations were more likely to say that they would miss 6 Music than the commercial station²⁷.

137. We also found that the majority of listeners felt the station offered something different to that which was available elsewhere. Some 82 per cent named at least one 6 Music programme which they felt could not easily be replaced by another station.

6 Music's breadth and depth of music content are the things which set it apart from other stations

138. 6 Music's service licence requires the station to contribute to delivery of the BBC's creativity purpose by extending the range of music available to its listeners and increasing their understanding by putting the music in context. Figure 22 shows that the station performs well for statements relating to music, indicating that it is delivering these aspects of its remit successfully.

139. In an open question, our survey respondents were asked if they could identify an aspect of the station which made it distinctive. A reference to 6 Music's wide range of music was by far the most common response²⁸.

140. This audience research outcome is consistent with the responses received through our public consultation which praised the station for playing a broad spectrum of music and for introducing listeners to new music alongside older, iconic tracks. It is also consistent with content analysis which shows that the station plays different music to other radio stations (Figure 23).

Figure 23: Song overlap between 6 Music and other radio stations in a typical week

Song overlap	6 Music and Radio 1	6 Music and Radio 2	6 Music and closest commercial competitor
All week	1%	4%	8%
Daytime	1%	2%	7%
Breakfast (7-10am)	0%	2%	5%
Drivetime (4-7pm)	0%	1%	5%

Source: Intelligent Media/ BBC Management. Average across four surveys carried out between 2007 and 2008

141. The station is required to support new artists and in particular to nurture UK talent. Content analysis indicates that the station plays between four and five times more new songs than comparable commercial stations and up to four times the number of new UK songs in its daytime output. Some 75 per cent of live music recorded is from UK artists.

²⁷ Likelihood to miss commercial stations was on average 54 per cent

²⁸ 9 in 10 6 Music listeners gave a reason why 6 Music is distinctive from other stations. The most common responses referred to; a wide range of music (58%); good/ better (quality) music (15%); good DJs/ presenters (13%); and knowledgeable DJs/ presenters (10%)

The station is taking steps to become even more distinctive through its live music and music news

142. Live music, delivered under the '*Hub*' brand, is a feature which sets 6 Music apart from many other digital radio stations. Our research indicates that this live music is comfortably meeting audience expectations although this is the lowest performing of the statements relating to the creativity purpose.
143. Recent research carried out by the Executive indicates that there is relatively low awareness of the *Hub* among 6 Music listeners suggesting that there is an opportunity to make an even greater impact with this content. The Executive plans to achieve this by:
- further use of the station's website to provide videos of music sessions and boost interactivity
 - focusing resources on fewer sessions to boost quality and impact then using these recordings more frequently across the schedule to reach a larger audience.
144. In 2008-09 the station exceeded its service licence condition relating to live music, broadcasting 330 new sessions against a requirement of 275 sessions. The service licence condition should be increased to a level that:
- is closer to the current number of sessions to safeguard current performance and ensure that audience expectations for 6 Music's live music continue to be met
 - still gives the station enough scope to focus more on the quality rather than the quantity of sessions to enhance their impact.

Recommendation

6 Music's live music is performing well and exceeding audience expectations but research carried out by the Executive suggests that there is an opportunity to raise awareness and make an even greater impact with this content. The Executive plans to achieve this by focusing resources on fewer sessions to enhance quality and using these recordings more frequently across the schedule.

The station is currently exceeding by some margin its service licence condition for the number of live music sessions broadcast each year. We will increase the service licence requirement from 275 to 300 sessions to ensure that current performance is maintained and to safeguard this distinctive aspect of 6 Music's offer. The new 300 session requirement is still below the number of sessions currently recorded, giving the Executive scope to focus on quality rather than quantity to enhance this content's impact.

145. 6 Music offers regular news bulletins each day from breakfast time to mid-evening. The station also provides a specialist music news service with bulletins covering musicians' activities, new work, and issues related to the wider UK music industry. Like the station's

Hub sessions, music news is a feature that sets 6 Music apart from other stations but which research indicates has limited resonance with the audience.

146. 6 Music has integrated music news into its Breakfast show by having the bulletin presenter contribute to the rest of the programme. This has allowed news items to be developed and commented upon, encouraging listener interaction, increasing accessibility and helping the news to match the tone of the programme. We welcome 6 Music's plans to extend this more integrated approach to other parts of the schedule.

147. The station also plans to produce further on-demand content for listeners. This includes making shortened content available for mobile devices.

There is a risk that efforts to grow audience levels could undermine 6 Music's distinctiveness

148. Respondents to our public consultation praised 6 Music presenters who showed personal enthusiasm and knowledge. These presenters make speech content more meaningful and encourage audiences to investigate unknown music alongside the familiar.

149. Some individual shows and presenters were criticised by respondents for lacking musical credibility and failing to set themselves apart from content on other stations. The presenters attracting criticism tended to be those who had been introduced to give the station a broader base of appeal. This highlights a potential tension between 6 Music's aim to grow its audience and at the same time remain distinctive.

Recommendation

One of the things which set 6 Music apart from other stations is its potential to extend listeners' musical repertoire and equip audiences to make informed choices without the influence of commercial pressure. The station should ensure that its presenters are not only popular but also have strong musical credibility so they can:

- act as trusted guides for music enthusiasts through the increasingly wide range of music available through digital technology
- effectively deliver the station's remit to develop an understanding of music and its context.

150. The recommendations made in this report will help mitigate the risk that efforts to grow reach undermine 6 Music's distinctiveness. We have asked the station to strengthen certain aspects of the service which make it distinctive and are introducing safeguards to the service licence to preserve features which currently differentiate 6 Music from other stations (recommendations 3b, 3c, 3e, 3f, 4a, 4c, and 4d). We believe that the risk would be further mitigated if the station were to develop projections of future growth. These projections should be both:

- an incentive for growth by giving the station a target against which the Executive can hold the station to account for performance and
- a check on excessive growth by encouraging the station to limit its audience to those listeners who would be attracted by the aspects of 6 Music which currently set it apart from other stations.

Recommendation

The Executive should report to the Trust with a target for 6 Music's audience based on an assessment of likely potential listeners.

This target should act as both an incentive for and a limit to growth by helping us to understand how far the station can grow without changing its distinctive character.

Value for Money

6 Music's costs have increased over the past three years

151. Figure 24 sets out 6 Music's expenditure between 2006-07 and 2008-09. The direct cost of making 6 Music's programmes was some £6.3 million in 2008-09. This figure includes the cost of 6 Music news and music news. The total cost to the licence fee payer for 6 Music, including content expenditure and the station's share of distribution, infrastructure and support costs, was around £9million in 2008-09. This total excludes expenditure on 6 Music's website which falls under the BBC Online service licence²⁹.

²⁹ In the past the Executive has not tracked online expenditure for individual radio stations but in 2009-10 6 Music's online expenditure is expected to be some £315,000.

Figure 24: 6 Music's expenditure compared with the station's service licence budget 2006-07 to 2008-09

	2006-07 £,000	2007-08 £,000	2008-09 £,000
Direct programme making expenditure (i)	5,251	5,448	6,343
Centrally allocated programme related expenditure(ii)	137	160	223
Total content expenditure (iii)	5,388	5,608	6,566
<i>Service Licence budget</i>	<i>4,900</i>	<i>5,000</i>	<i>6,000</i>
Total content expenditure (iii)	5,388	5,608	6,566
Distribution (iv)	500	500	400
Infrastructure/support (v)	1,400	1400	2100
Total	7,288	7,508	9,066

Source: BBC annual reports and management accounts

Notes

- (i) expenditure controlled by the 6 Music management team. Unlike Radio 2, this total includes the cost of 6 Music news and music news. These are direct costs for 6 Music rather than centrally allocated overheads
- (ii) this includes costs relating to collecting societies (royalty payments etc.), audience research and communications
- (iii) this expenditure is monitored against 6 Music's service licence budget (£6 million in 2008-09). The Trust allows a 10 per cent overspend or underspend against this budget each year
- (iv) 6 Music's share of broadcast transmission costs
- (v) 6 Music's share of non-programme specific overheads including non-programme related property, technology, finance, HR, training, legal, marketing (which is controlled centrally), executive management, licence fee collection, governance, sale of assets and restructuring costs.

152. The Trust controls expenditure through service licence budgets and any variance between budget and expenditure greater than 10 per cent is subject to Trust approval. Figure 2 shows that in 2007-08 6 Music's content costs of £5.6 million narrowly exceeded this 10 per cent tolerance. The over spend was investigated by the Trust, found to be the result of changes in the way the BBC allocates costs to services including expenditure on *The Electric Proms*. These changes had a disproportionately large impact on 6 Music because of its relatively small budget in comparison to analogue radio stations. The budget for 2008-09 was increased to £6 million to allow for these accounting changes.

153. In 2008-09 there was an increase in 6 Music's total expenditure compared with the previous year although costs were within 10 per cent of the station's service licence budget and therefore did not require separate approval from the Trust. The increase was

due to a change in 6 Music's share of infrastructure overheads and an increase in presenter costs incurred in efforts boost the station's audience. In spite of this increase, 6 Music's budget is lower than average for the BBC's digital radio stations.

Commercial radio has raised concerns that 6 Music's budget is larger than that of commercial digital radio stations

154. Like Radio 2, 6 Music has been criticised for costing much more than commercial digital radio stations. Through our consultation, RadioCentre has suggested that the station is significantly more expensive than the commercial digital radio station Planet Rock.

155. There are differences in the range and quality of 6 Music's offer which go some way to explain these variations. 6 Music covers a much broader range of music, plays significant amounts of live music and provides news as well as music news. These elements of 6 Music's schedule are expensive and the Trust is keen to retain them to ensure that 6 Music remains distinctive from commercial stations.

6 Music is taking steps to become more efficient

156. Although there are significant differences between 6 Music and commercial stations, some aspects of 6 Music's offer are comparable and we are keen to ensure that the cost of these elements is in keeping with costs incurred elsewhere. The Executive has been benchmarking production costs and presenter costs as set out in Figure 17 above and has plans in place to save £14million from Radio 2 and 6 Music by 2012-13. The Trust will monitor these savings and will report progress against targets through the Annual Report (recommendation 5a).

There is scope for the station to become more cost effective by increasing reach without additional investment

157. The station's cost per listener hour is close to the average for the BBC digital radio stations and has decreased in 2008-09 compared with the previous year, indicating that the station is becoming more cost effective (Figure 25)³⁰.

³⁰ Unlike Radio 2 we did not carry out a survey to ask licence fee payers whether 6 Music is value for money or model what would be lost in public value terms if the station's budget was cut significantly. This is because 6 Music's budget is significantly less than Radio 2's.

Figure 25: 6 Music cost per listener hour compared with other BBC digital-only stations

	2007-08 Pence	2008-09 Pence
5 Live Sports Extra	2.2	2.6
1Xtra	5.2	4.5
6 Music	4.0	3.4
BBC 7	2.5	2.0
Asian Network	7.5	6.9
BBC digital radio average	4.3	3.9

Source: BBC Annual Reports

158. As set out in recommendation 3a we believe that 6 Music is reaching too few listeners and must increase its audience to realise its potential. We would like the station to achieve this growth without additional investment. This would further reduce 6 Music's cost per listener hour and make the station more cost effective.

159. The Executive should consider whether concentrating greater resources on fewer programmes would help to boost reach without increasing costs. 6 Music is a portfolio station. As such, most of the audience listen selectively rather than staying tuned throughout the day. The station's audience also tend to be frequent users of digital technology and are more inclined than average to access content on-demand. For these reasons listeners are more likely to tolerate the introduction of repeats if this means that the programmes they choose to listen to are of higher quality and can be accessed when and where they want them.

Recommendation

To make 6 Music more cost effective, plans to grow reach should be implemented without increasing costs. The station should consider whether focusing greater resources on fewer programmes to boost quality would help to achieve this aim. This approach would involve investing in content that both suits on-demand listening and can easily be repeated.