

# **BBC Trust service review**

Supporting performance analysis

**Radio 4, Radio 4 Extra, Radio 5  
live and Radio 5 live Sports  
Extra**

August 2015

# Contents

## **Weekly reach and usage**

Reach by station	4
Reach by demographic group	5
Reach by nation / region	8
Reach by key genres	10
Reach by platform	12
Share of listening	13
Average audience by day-parts	14
Average listener hours	17

## **Quality**

General impression by station	19
Average AI scores	20
Original and different scores	23

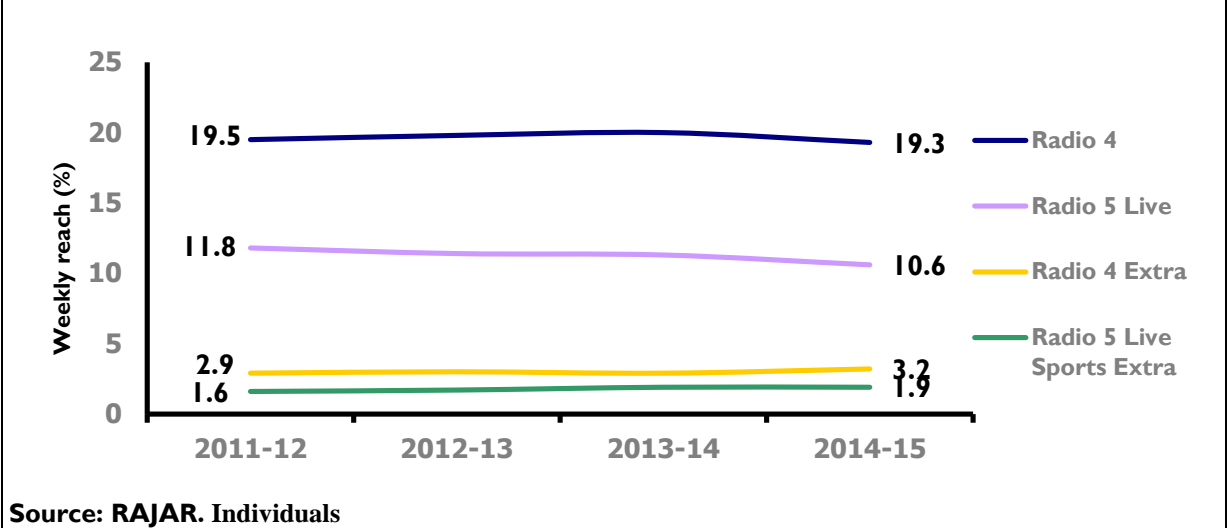
Figure 1: Weekly reach.....	4
Figure 2: Weekly reach by quarter .....	4
Figure 3: Weekly reach of Radio 4 by demographic group .....	5
Figure 4: Weekly reach of Radio 4 Extra by demographic group.....	5
Figure 5: Weekly reach of Radio 5 Live by demographic group .....	6
Figure 6: Weekly reach of Radio 5 Live Sports Extra by demographic group .....	6
Figure 7: Weekly reach of Radio 5 Live and talkSPORT by demographic group.....	7
Figure 8: Weekly reach of Radio 4 by Nation / Region .....	8
Figure 9: Weekly reach of Radio 5 Live by Nation / Region.....	9
Figure 10: Radio 4 weekly reach by genre .....	10
Figure 11: Radio 5 Live weekly reach by genre.....	11
Figure 12: Radio 4 reach by platform (%).....	12
Figure 13: Radio 5 Live Sport reach by platform.....	12
Figure 14: Share by year.....	13
Figure 15: Radio 4 average audience by day-part .....	14
Figure 16: Radio 5 Live average audience by day-part.....	15
Figure 17: Radio 4 Extra average audience by day-part .....	16
Figure 18: Time Spent Listening .....	17
Figure 19: Time Spent Listening by quarter.....	18
Figure 20: General impression score by quarter.....	19
Figure 21: General impression score by quarter.....	20
Figure 22: Average AI score by network station.....	20
Figure 23: Average AI score by digital station.....	21
Figure 24: Average AI score by Genre.....	22
Figure 25: Original and different score by network station .....	23
Figure 26: Original and different score by digital station .....	23

# Weekly Reach and Usage

## Reach by station

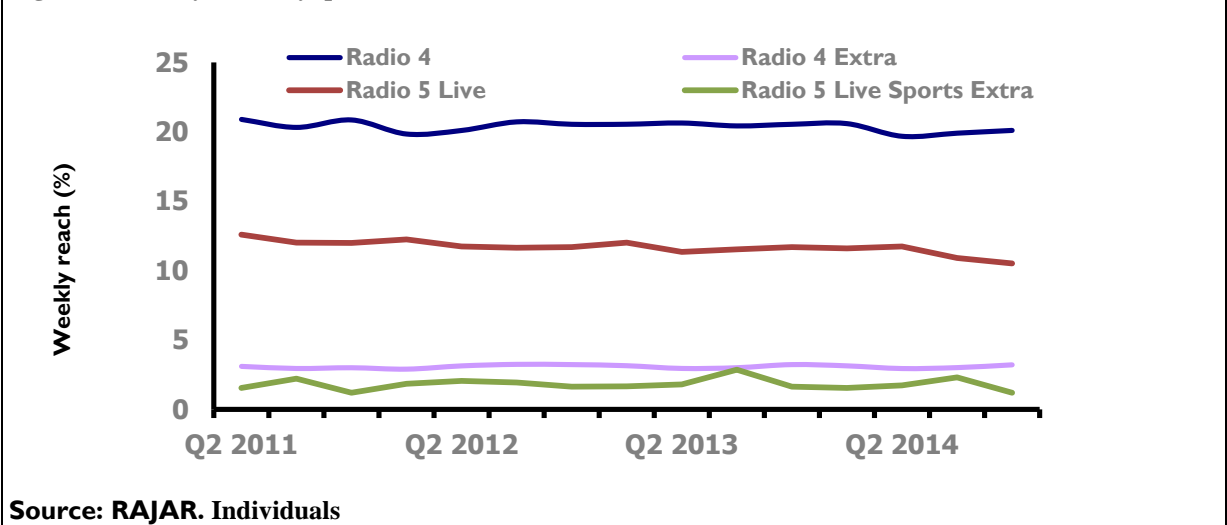
Weekly reach for Radio 4 has remained stable between 2011-12 and 2014-15, while reach for Radio 5 Live has experienced a decline. Weekly reach for both Radio 4 Extra and Radio 5 Live and remained largely unchanged.

Figure 1: Weekly reach



Radio 4’s weekly reach has held steady between 19.5% in 2011-12 to 19.3% in 2014-15. Over the same period, weekly reach for Radio 5 Live has been in decline, dropping from 11.9% to 10.8%. Digital stations Radio 4 Extra and Radio 5 Live Sports Extra have much lower reach and have remained stable between 2011-12 and 2014-15. The chart below shows that there is little quarterly difference for Radio 4 and Radio 4 Extra. Radio 5 Live has peaks, largely based around major sports events, while Radio 5 Live Sports Extra’s peaks are due to summer cricket coverage.

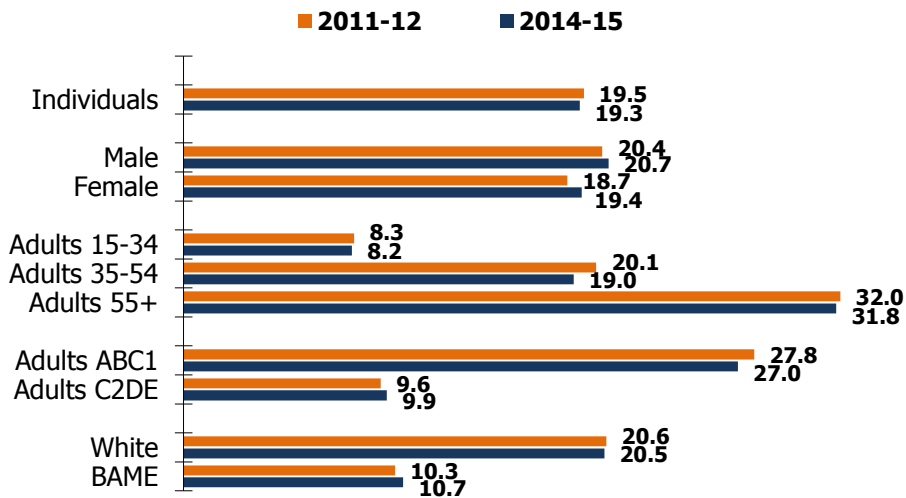
Figure 2: Weekly reach by quarter



## Reach by demographic group

Radio 4's weekly reach was stable for all individuals between 2011-12 and 2014-15. The greatest increase to weekly reach occurred amongst female listeners and C2DE listeners. Adults 35-54 experienced a decline to weekly reach while there was stability amongst younger and older audiences.

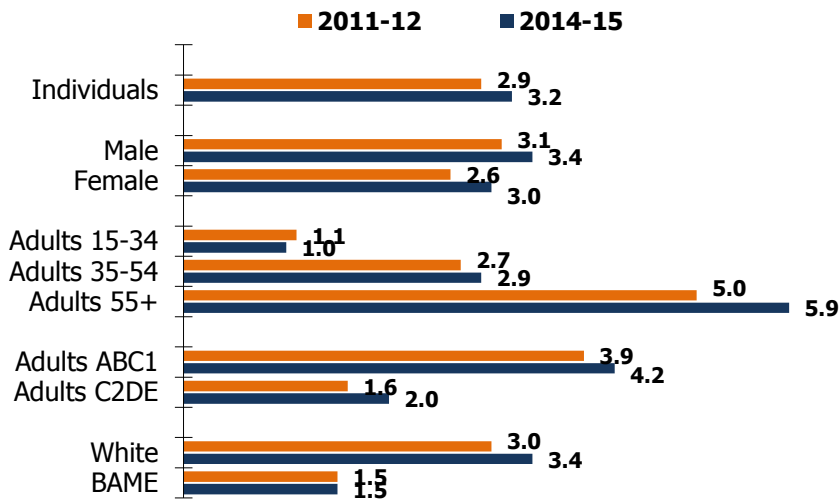
Figure 3: Weekly reach of Radio 4 by demographic group



Source: RAJAR

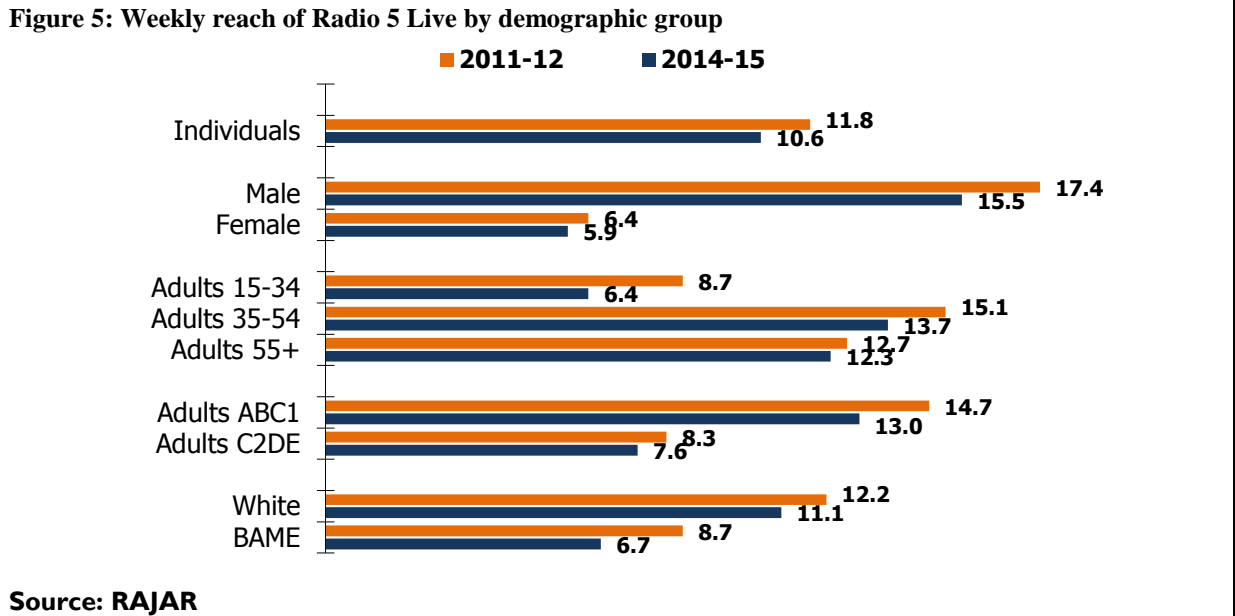
Weekly reach amongst all individuals increased for Radio 4 Extra between 2011-12 and 2014-15. This was driven largely by increases amongst older, white listeners.

Figure 4: Weekly reach of Radio 4 Extra by demographic group

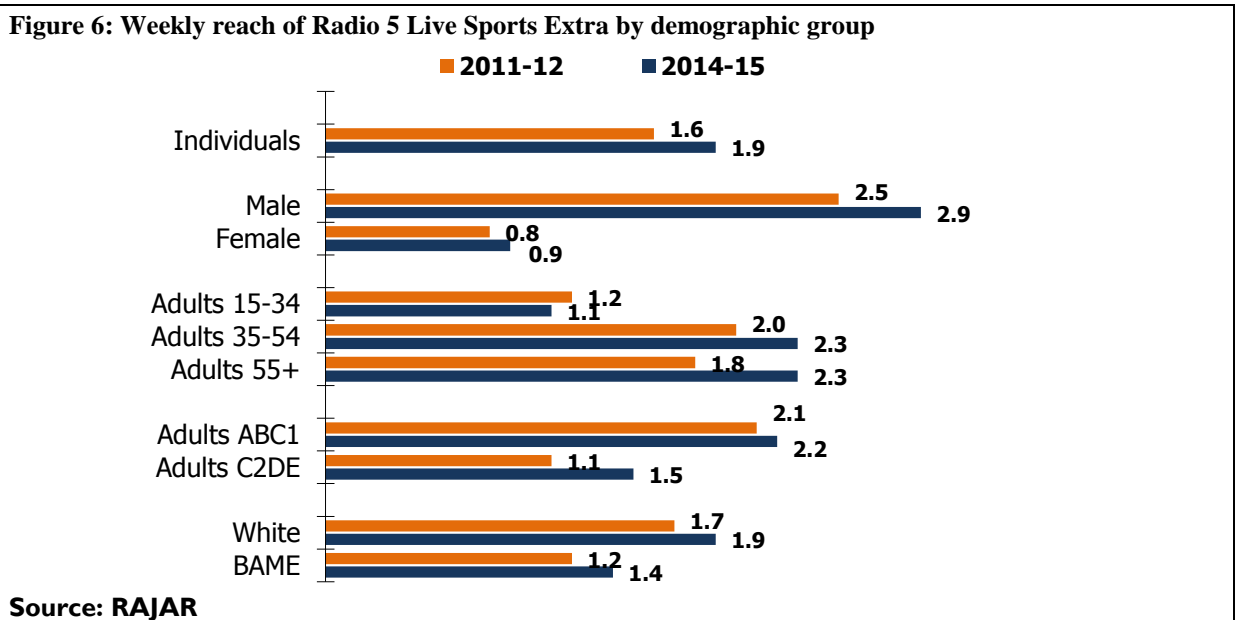


Source: RAJAR

The drop in reach to Radio 5 Live came largely through declines to male and younger listeners. While reach for female listeners was more stable, all be it much lower, male reach declined from 17.4% to 15.5% between 2011-12 and 2014-15. The greatest decline by demographic group came amongst younger listeners, where reach fell by over 2 points to 6.4%.

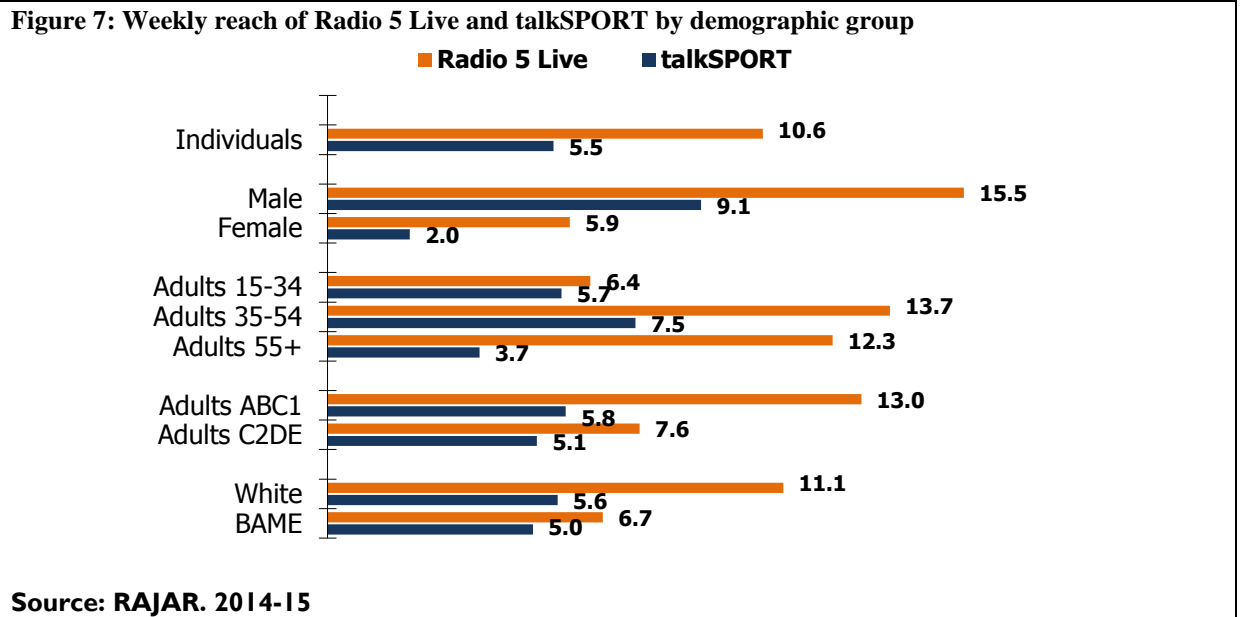


There was an increase in reach for Radio 5 Live Sports Extra between 2011-12 and 2014-15. The station experienced a rise in reach amongst older listeners and declines amongst younger audiences.



There are key differences to the demographic split of Radio 5 Live and talkSPORT. While Radio 5 Live skews towards white, ABC1 listeners, talkSPORT has a more even split between

white and BAME listeners and between ABC1 and C2DE listeners. Both stations skew towards male listeners, although the talkSPORT skew is particularly heavy. Both stations attract the greatest reach amongst adults aged between 35 and 54, with Radio 5 Live skewing older overall.



## Reach by Nation / Region

**Radio 4's weekly reach varies by Nation, however all nations increased reach between 2011-12 and 2013-14. Reach remains much higher in the south of England compared to North, although reach decreases in southern regions were matched by increases in northern regions.**

The tables below show weekly reach by nation and by English region, in order of highest weekly reach in 2014-15. Radio 4 has a much higher weekly reach in England (21.2%) compared to Scotland (13.9%) and Northern Ireland (8.6%). Weekly reach in Wales currently stands at 18.0%.

Radio 4 has the highest reach in the South East of England. This region has also recorded the greatest increase in reach, rising from 24.6% in 2011/12 to 28.5% in 2013-14. At the other end, Yorkshire and Lincolnshire had the lowest weekly reach, while North West and North East Cumbria all had reach below 18%. Including East Midlands and West Midlands, the bottom five regions all increased their weekly reach between 2011-12 and 2013-14.

**Figure 8: Weekly reach of Radio 4 by Nation / Region**

<b>Nation</b>	<b>2011-12</b>	<b>2014-15</b>	<b>+ / -</b>
England	21.7	21.2	0.5
Wales	18.2	18.0	0.2
Scotland	13.3	13.9	0.6
Northern Ireland	7.7	8.6	0.9

<b>English Region</b>	<b>2011-12</b>	<b>2014-15</b>	<b>+ / -</b>
South East	26.0	27.8	1.8
South	28.1	27.4	0.7
West	27.4	25.6	1.8
South West	25.7	23.4	2.3
London	24.8	23.4	1.4
East	22.0	22.3	0.3
East Midlands	18.6	19.9	1.3
West Midlands	18.8	18.8	0
North West	18.0	17.4	0.6
Yorkshire And Lincolnshire	16.1	15.8	0.3
North East And Cumbria	16.4	15.7	0.7

**Source: RAJAR. Adults**



## Radio 5 Live - Reach by Nation / Region

**Radio 5 Live has its highest weekly reach in England and lowest in Scotland. All nations experienced decline between 2011-12 and 2014-15. The South East was the only English region to experience an increase for reach between 2011-12 and 2014-15.**

In line with declines to overall reach, all four nations experienced declines to weekly reach between 2011-12 and 2014-15. Wales experienced the steepest decline, with reach dropping from 9.8% to 8.3%. Reach remains highest in England (11.4%) and lowest in Scotland (7.3%). Weekly reach in Northern Ireland fell by 1.2% points, from 11.2% to 10.0% in 2014-15.

Radio 5 Live has the highest reach in East and West England, with 13.3% and 12.5% reach respectively. The only English region to experience an increase to weekly reach between 2011-12 and 2014-15 was South East, with reach rising from 10.8% to 11.8%. The South West region had the greatest decline over the last three years, with weekly reach falling from 14.7% to 11.7% between 2011-12 and 2014-15. There were also heavy declines over the same period for South (-2.6%) and West Midlands (-2.5%).

**Figure 9: Weekly reach of Radio 5 Live by Nation / Region**

<b>Nation</b>	<b>2011-12</b>	<b>2014-15</b>	<b>+ / -</b>
England	12.8	11.4	1.4
Northern Ireland	11.2	10.0	1.2
Wales	9.8	8.3	1.5
Scotland	8.4	7.3	1.1

<b>English Region</b>	<b>2011-12</b>	<b>2014-15</b>	<b>+ / -</b>
East	13.7	13.3	0.4
West	14.6	12.5	2.1
South East	10.8	11.8	1
East Midlands	13.5	11.7	2.2
South West	14.7	11.7	3.0
West Midlands	14.1	11.6	2.5
North West	13.8	11.5	2.3
North East / Cumbria	11.7	11.2	0.5
London	11.9	10.9	1.0
South	12.3	10.9	2.6
Yorkshire And Lincolnshire	11.4	10.3	1.1

**Source: RAJAR. Adults**

## Reach by key genres

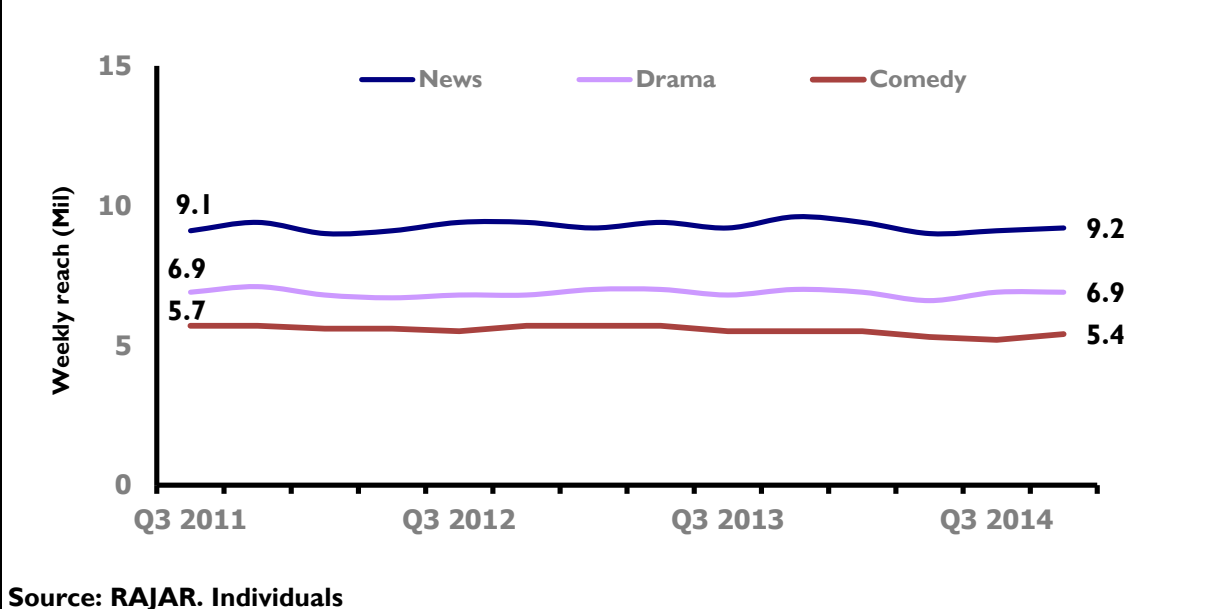
**News has the highest weekly reach of all the major Radio 4 genres, reaching an average of 9.2 million listeners each week. Both News and Drama have experienced stable reach between 2011 and 2014, however reach for comedy has declined.**

The chart below shows the weekly reach of the three key genres on Radio 4, including News, Drama and Comedy. News on Radio 4 has a very strong and stable reach of 9.2 million listeners per week. The Today show is Radio 4's flagship news programme – broadcast between 6am to 9pm on Monday to Friday, the show currently has an average weekly reach of 6.7 million listeners. This has marginally fallen from 6.8 million listeners over the same period last year. Other drivers of News reach include PM at 5pm as well as regular news bulletins. Radio 4 must broadcast at least 2,500 hours of news and current affairs programmes each year.

Radio 4's service licence also states that the station must broadcast at least 600 hours of original drama and readings each year. Drama on Radio 4 has a stable weekly reach of just below 7 million listeners. Long running series The Archers drives drama listening to Radio 4 and currently has a weekly reach of 4.7 million. In Q3 2014, The Archers had an average AI score of 81, unchanged on the equivalent quarter of the previous year.

Radio 4 must broadcast at least 180 hours of original comedy every year. Comedy is the one key genre that has experienced declines for weekly reach. Between Q3 2011 and Q4 2014, weekly reach for comedy has fallen from 5.7 million listeners per week, to 5.4 million.

Figure 10: Radio 4 weekly reach by genre



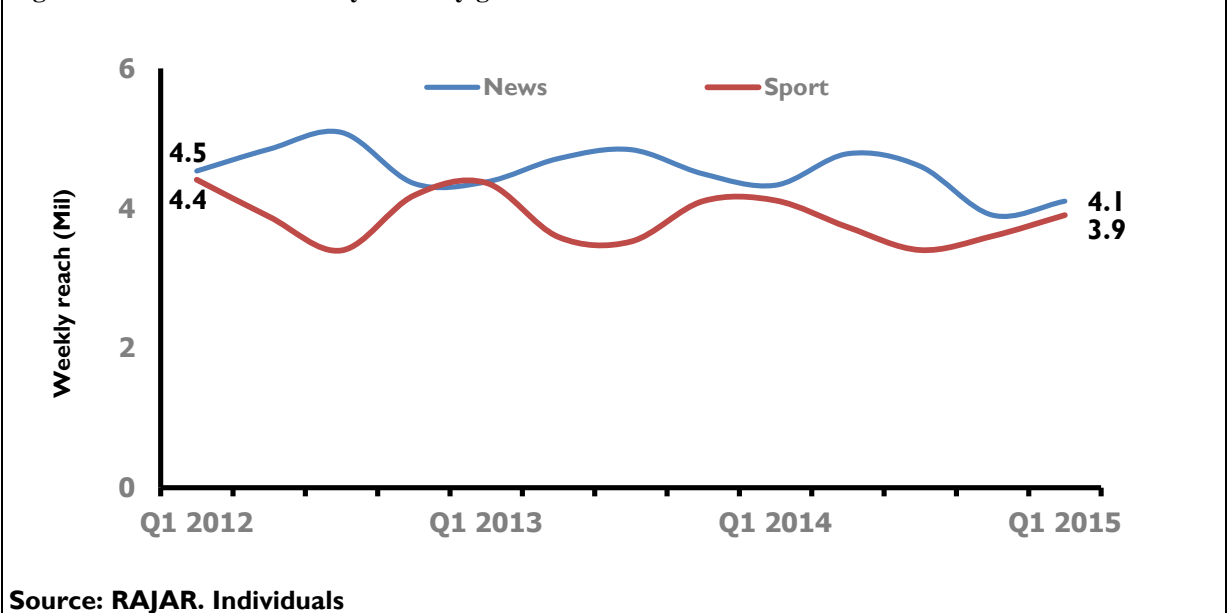
## Radio 5 Live - Reach by Genre

**News on Radio 5 Live had an average weekly reach of 4.1 million listeners in Q1 2015, while Sport had a reach of 3.9 million listeners. Both News and Sport have experienced fluctuating reach since 2012.**

News on Radio 5 Live has lost reach between Q1 2012 and Q1 2015, dropping from 4.5 to 4.1 million listeners each week. News on Radio 5 Live has experienced a gradual decline in reach despite quarterly fluctuation. The declines to News reach were most pronounced between 2012 and 2013.

Sport on Radio 5 Live has also had declines to reach. Sport on Radio 5 Live reached an average of 4.4 million listeners per week in Q1 2012, compared to 3.9 million listeners in Q1 2015. Reach declines for sport have come about more recently, particularly in 2014.

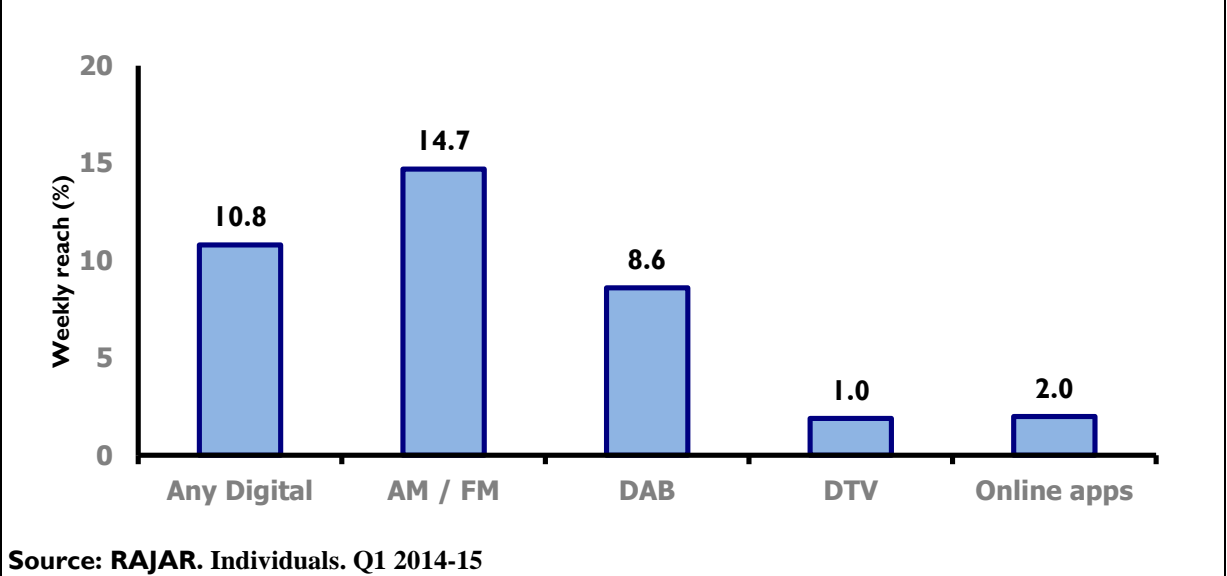
Figure 11: Radio 5 Live weekly reach by genre



## Reach by Platform

The majority of listening for Radio 4 comes via AM / FM platform. Radio 4 listening via AM / FM reaches an average of 14.7% or 7.8 million listeners per week. Reach via digital platform has increased to 10.8% or 5.8 million listeners. DAB listening reaches 8.6% each week, accounting for 4.6 million listeners. Listening via Online apps and DTV has a much lower reach at 2.0% and 1.0% respectively.

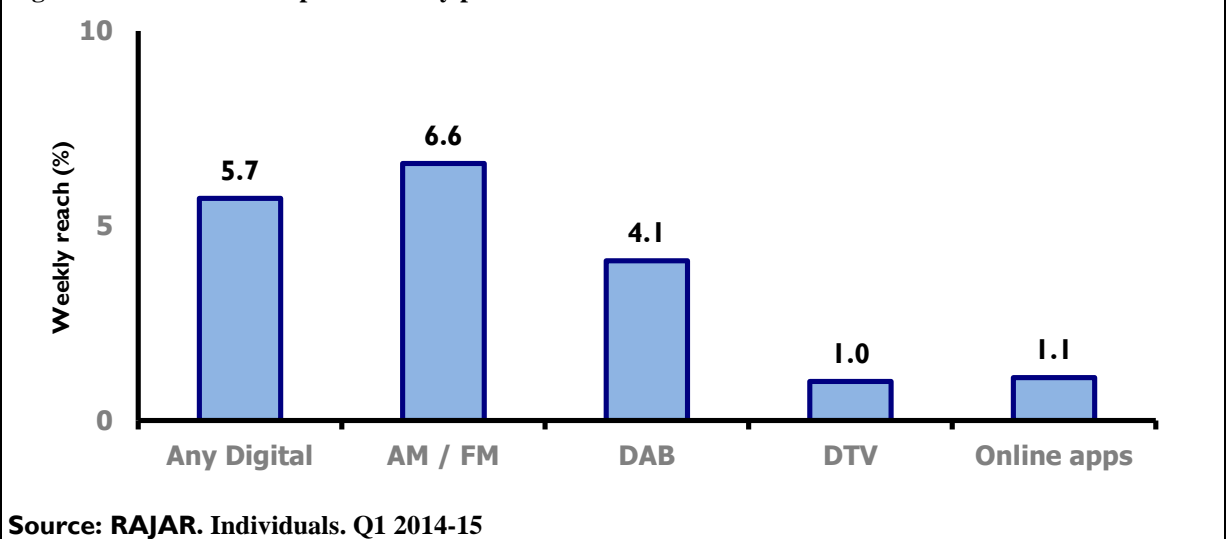
Figure 12: Radio 4 reach by platform (%)



### Radio 5 Live – Reach by Platform

Like Radio 4, the highest proportion of listening for Radio 5 Live is through the AM / FM platform. Radio 5 Live listening via AM / FM reaches an average of 6.6% or 3.6 million listeners per week. Reach via digital platform has risen to 5.7% or 3.0 million listeners. DAB listening reaches 4.1% each week, equating to 2.2 million listeners. Listening via Online apps and DTV has a much lower reach at 1.0% and 1.1% respectively.

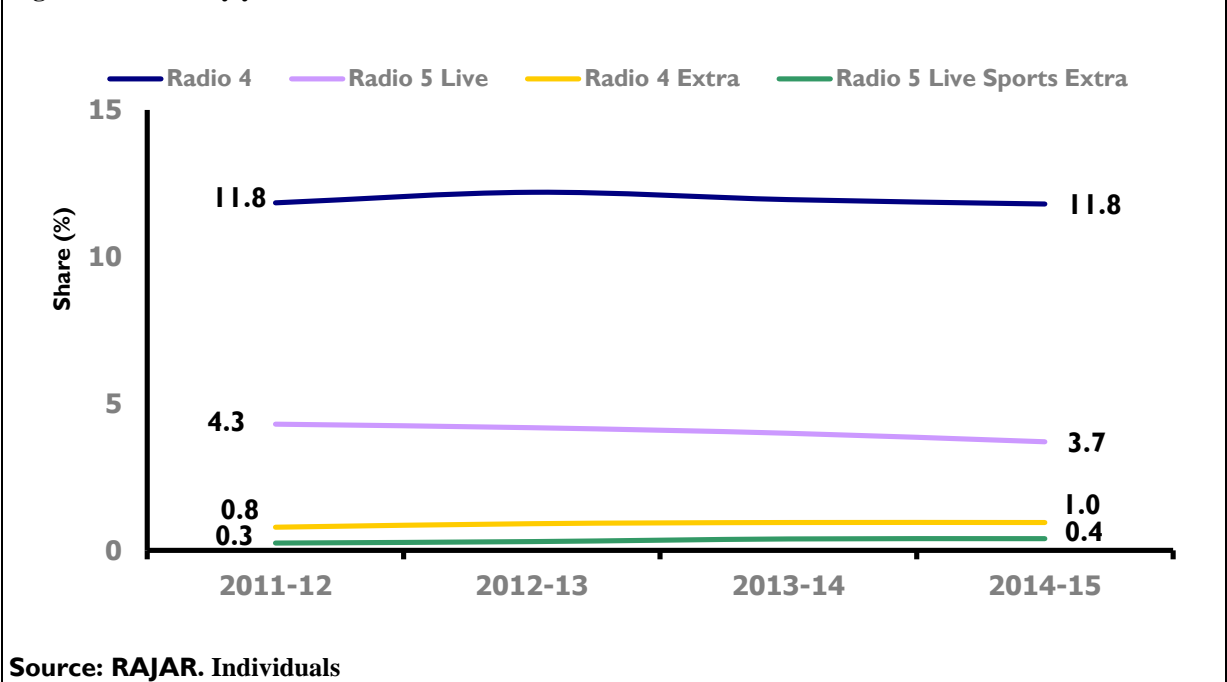
Figure 13: Radio 5 Live Sport reach by platform



## Share of listening

Radio 4's share has remained stable between 2011-12 and 2014-15, while share for Radio 5 Live has experienced a decline. Weekly reach for both Radio 4 Extra and Radio 5 Live are marginally up or stable in the last three years.

Figure 14: Share by year



Radio 4's share has held steady between 2011-12 and 2014-15 with little fluctuation over the three years. In contrast Radio 5 Live has experienced steady decline, with audience share falling from 4.3% to 3.7% between 2011-12 and 2014-15.

On the digital stations, both stations shares are much lower. Radio 4 Extra has a share of 1.0%, having risen from 0.8% in 2011-12. Radio 5 Live Sports Extra has a smaller share of 0.4%, marginally up since 2011-12.

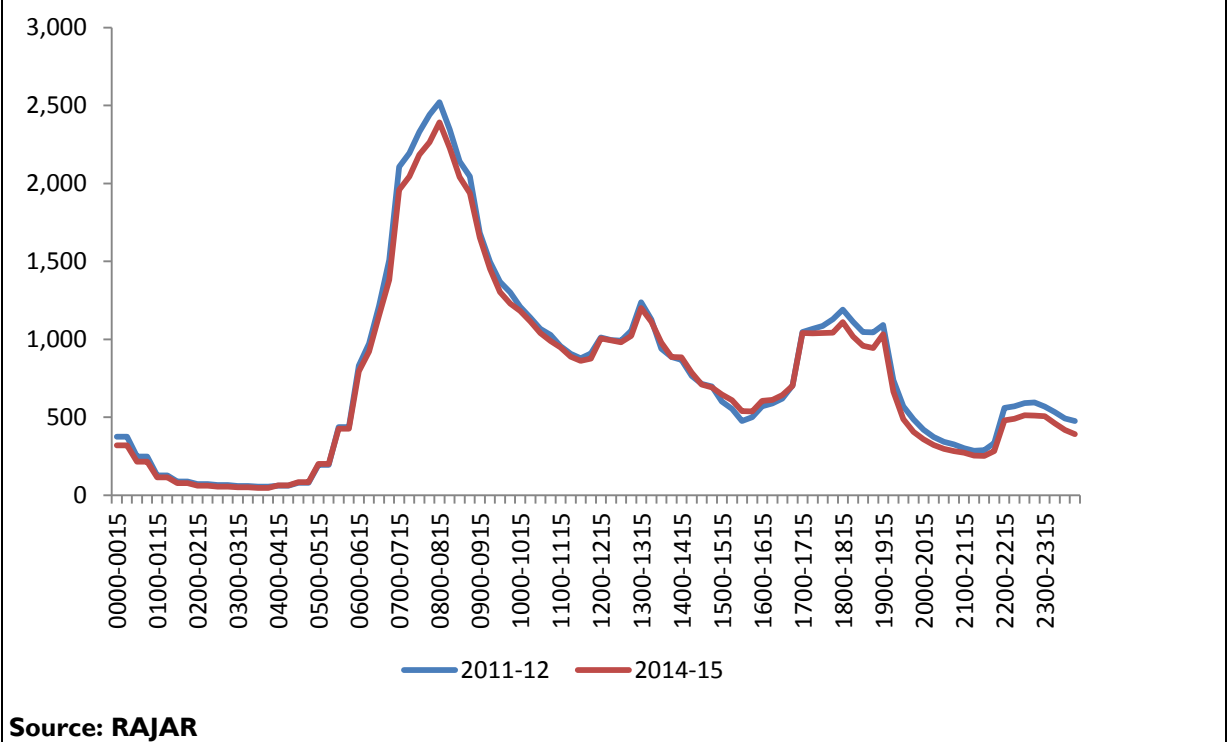
## Average audience by day-part

**Radio 4's average audience by day-part is largely unchanged between 2011-12 and 2013-14, with listening reaching a peak audience between 8:00 and 9:00. Early afternoon listening has experienced a marginal decline in the last two years.**

The chart below shows the average audience split by 15 minute interval for Radio 4 across 2013-14. The average audience has a clear peak during breakfast listening and specifically Today. This is followed by a smaller peak at 13.00 for The World at One and a final peak during drive-time for PM.

The average audiences for both 2011-12 and 2014-15 are fairly similar, although there are some minor differences. The average audience for the earlier half of Today was higher in 2011-12 than 2013-14, while the latter half of PM currently has a higher audience than two years previously. Average audiences were higher in the mid-afternoon in 2011-12.

**Figure 15: Radio 4 average audience by day-part**



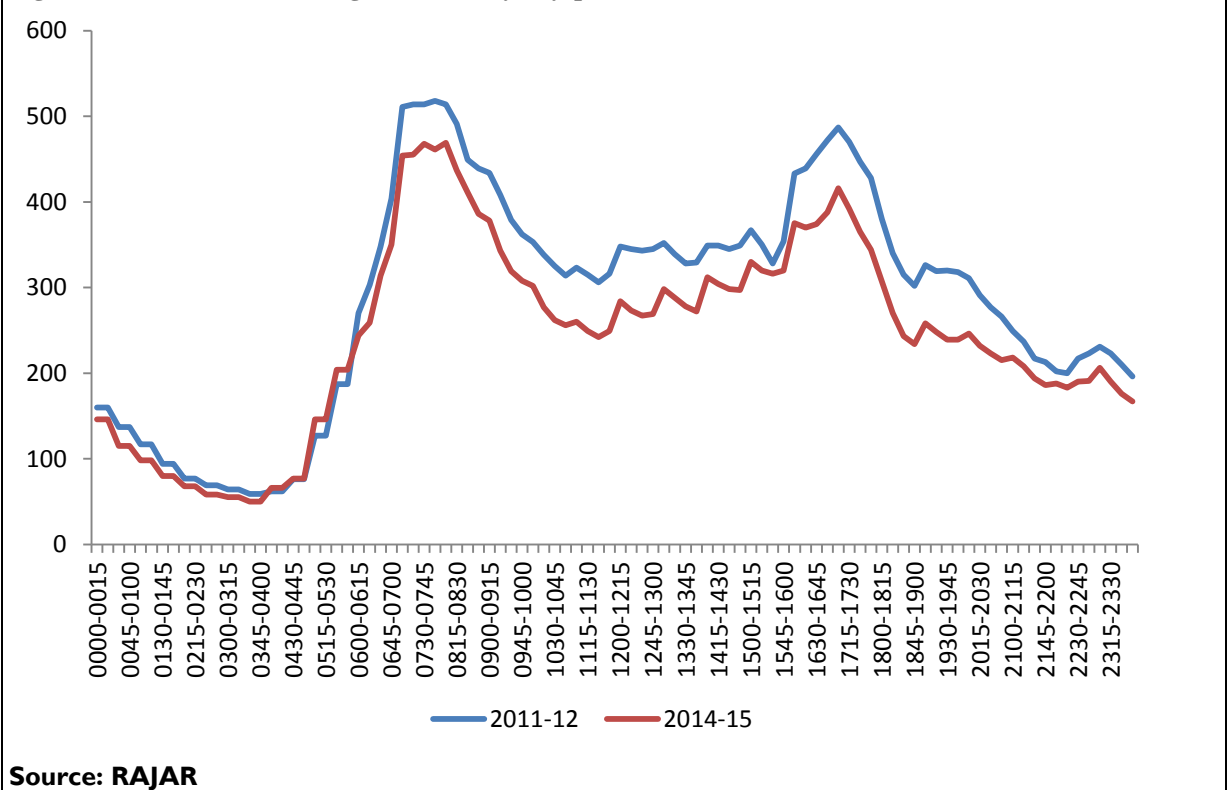
Radio 5 Live - Average audience by day-part

**Audiences for Radio 5 Live have declined across key parts of the schedule, including breakfast and drive-time. The greatest single decline in audience is in the evening, between 19.30 and 20.00.**

Overall declines for Radio 5 Live's weekly reach between 2014-15 and 2011-12 have been matched by declines to average audiences across the schedule. The two major slots, breakfast and drive-time, have both experienced declines to average audiences in the past two years.

Declines to average audiences for Breakfast listening were marginal in comparison to other declines. Afternoon listening had declines between 12.00 and 16.00, followed by further declines into drive-time. The peak 15 minute audience during drive-time fell from an average of 487,000 listeners to an average of 434,000 listeners. The greatest decline in audience was later in the schedule, between 19.30 and 20.00. The average audience fell from 320,000 listeners to 239,000 listeners between 2011-12 and 2013-14.

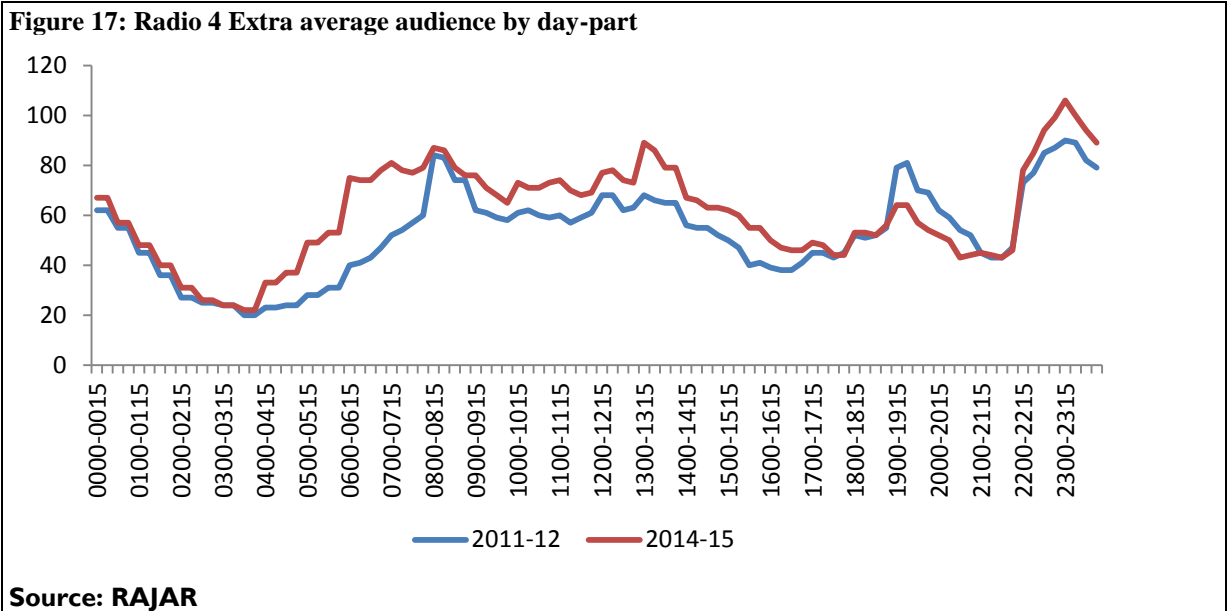
**Figure 16: Radio 5 Live average audience by day-part**



Source: RAJAR

## Radio 4 Extra - Average audience by day-part

Radio 4 Extra experienced increases to average audience in the morning, particularly pre and post breakfast. Unlike Radio 4 and Radio 5 Live, Radio 4 Extra does not have the conventional peaks of breakfast and drive-time. The average audience is highest between 22.00 and 23.30, and except of 03.00 – 04.00, drive-time has the lowest average audience.





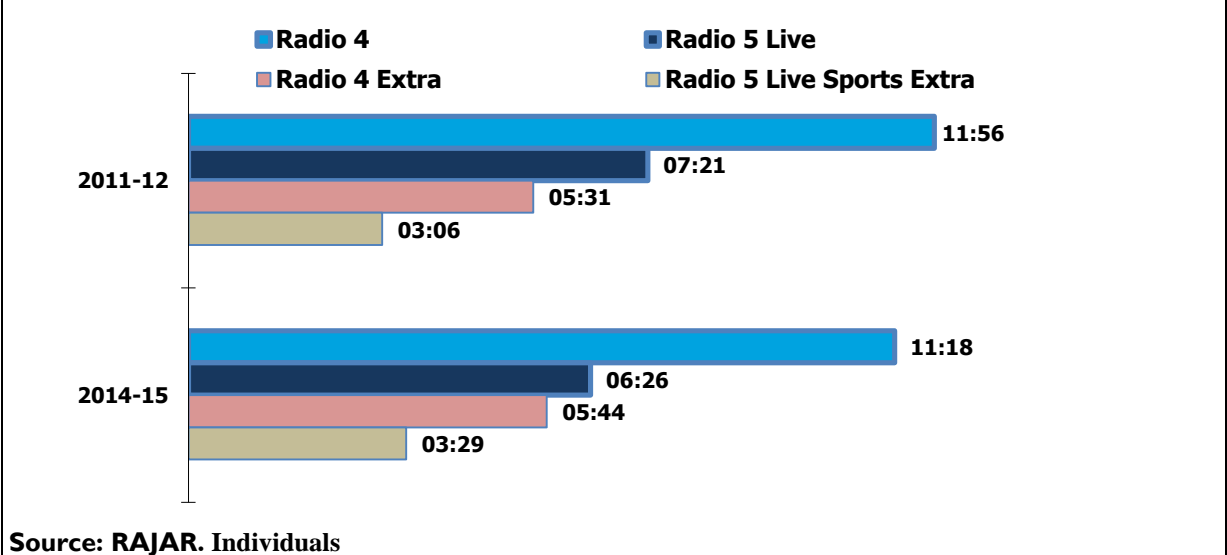
## Average listener hours

**Listener hours have declined for Radio 4 and Radio 5 Live in line with overall declines in listening to network radio. Average listening for Radio4 Extra and Radio 5 Live Sports Extra has increased between 2011-12 and 2014-15.**

The chart below look at the average time spent listening to each radio station per week per listener. Overall listening for Radio 4 has declined between 2011-12 and 2014-15 by 38 minutes per week, from 11 hours and 56 minutes to 11 hours and 18 minutes. Similarly, listening has declined on Radio 5 Live, from 7 hours and 21 minutes per week in 2011-12 to 6 hours and 26 minutes per week in 2014-15.

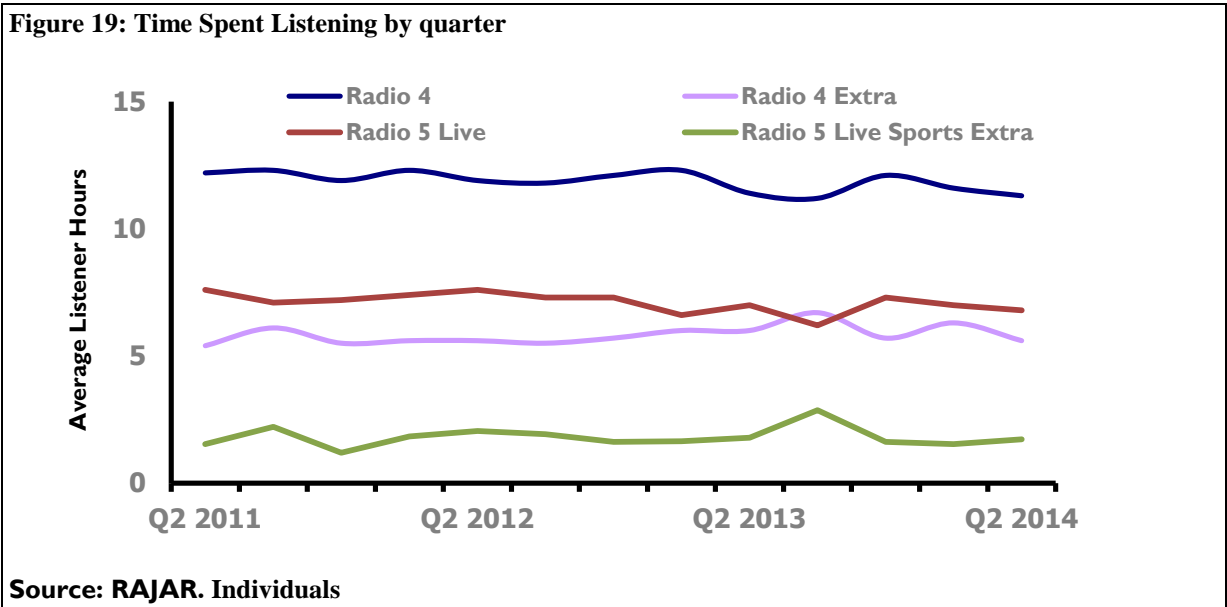
In contrast, time spent listening to digital stations Radio 4 Extra and Radio 5 Live Sports Extra have increased between 2011-12 and 2014-15. Average listening increased by 13 minutes per week on Radio 4 Extra to 5 hours and 44 minutes, while there was an increase of 23 minutes per week for Radio 5 Live Sports Extra to take average listening to 3 hours and 29 minutes.

Figure 18: Time Spent Listening



The chart below shows time spent listening to each station by quarter. Radio 4 and Radio 5 Live follow similar trends, with stability across 2011 and 2012, followed by drops to listening in 2013 and 2014. Radio 5 Live experienced its biggest decline between Q2 2013 and Q3 2013, with a fall of around 45 minutes per week.

On Radio 4 Extra, average listening increased at the point of decline to listening for Radio 4, in Q2 2013. The same was similar for Radio 5 Live Sports Extra and Radio 5 Live in Q3 2013, although this was a temporary migration of viewers to follow live cricket, as average listening returned to normal the following quarter, before a period of gradual decline through 2014.



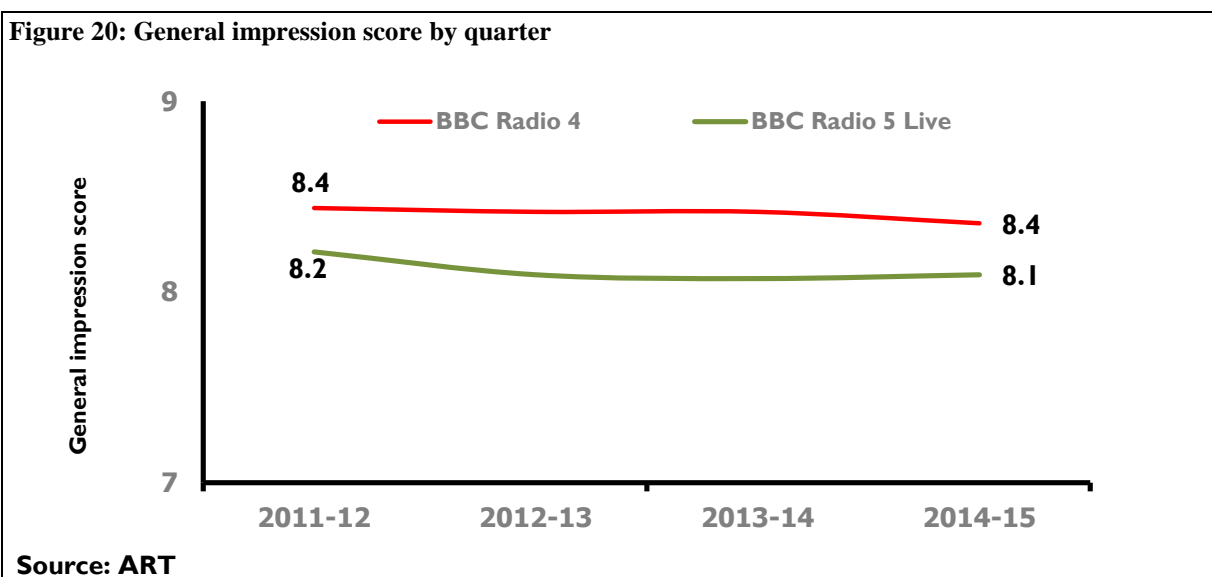
# Quality

## General impression scores

**Radio 4 has delivered consistently high general impression scores each year since 2011-12. Radio 5 Live's general impression score is lower although also high. There is greater fluctuation for Radio 4 Extra and Radio 5 Live Sports Extra due to lower sample sizes.**

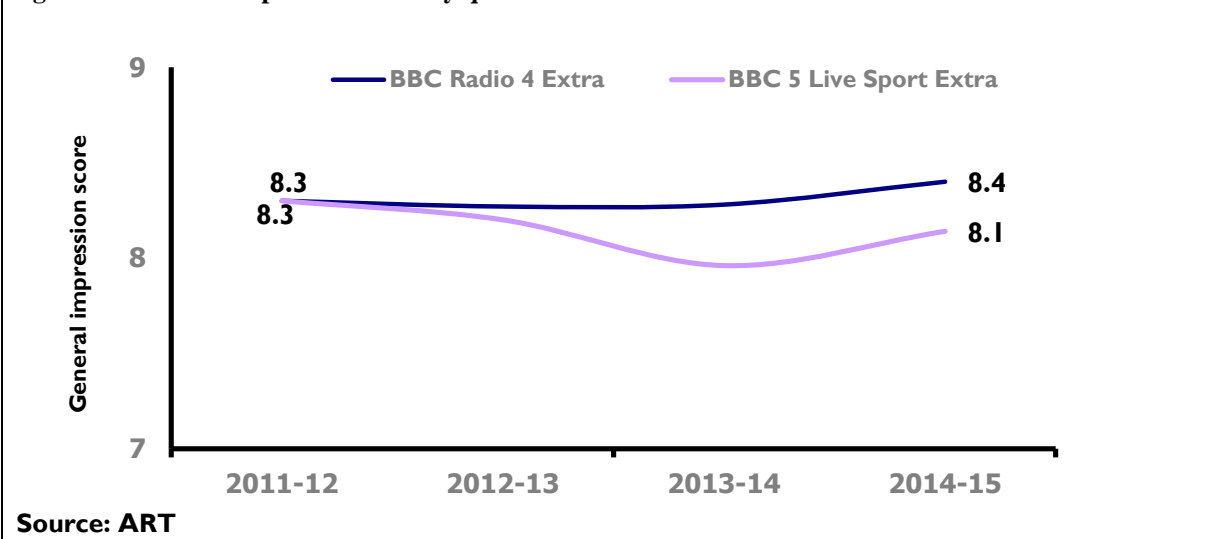
The chart below looks at general impression scores, with those to have listened to a station within the previous seven days giving a score out of 10. In 2014-15, Radio 4 had a general impression score of 8.4 out of 10, unchanged since 2011-12. The general impression score has remained strong and stable over the last three years.

Radio 5 Live has a lower general impression score than Radio 4 but is more in line with other BBC network station scores. Radio 5 Live had a general impression score of 8.1 out of 10 in 2014-15, marginally below the 2011-12 score of 8.2. In context, Radio 1 had a general impression score of 7.6 in 2014-15, while Radio 2 had a score of 8.1. Digital station 6Music had a score of 8.7 in 2014-15.



The general impression score for Radio 4 Extra can be less reliable due to lower sample sizes, however scores have often been strong, averaging 8.4 out of 10 in 2014-15. Radio 5 Live Sports Extra has a slightly lower score of 8.1, with increased quarterly fluctuation, largely due to the seasonal focus on cricket.

Figure 21: General impression score by quarter

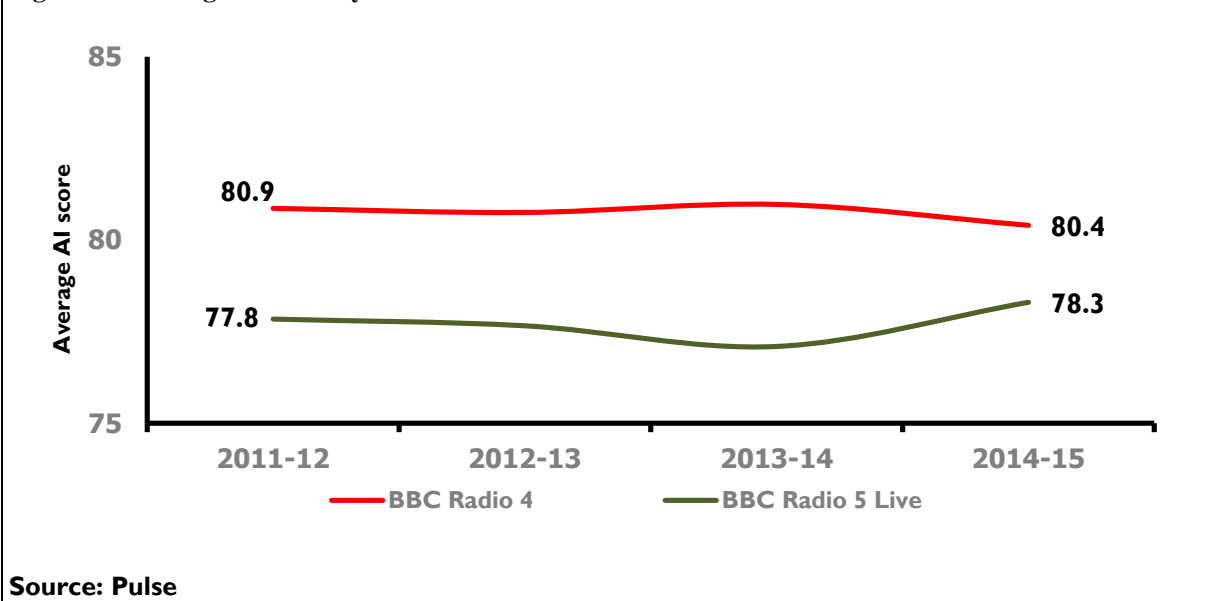


### Average AI Scores

Radio 4’s average AI score has remained stable between 2011-12 and 2014-15 and currently stands at 80.4. As with the general impression score, Radio 5 Live sits below Radio 4 in terms of quality and had a 2014-15 average AI score of 78.3.

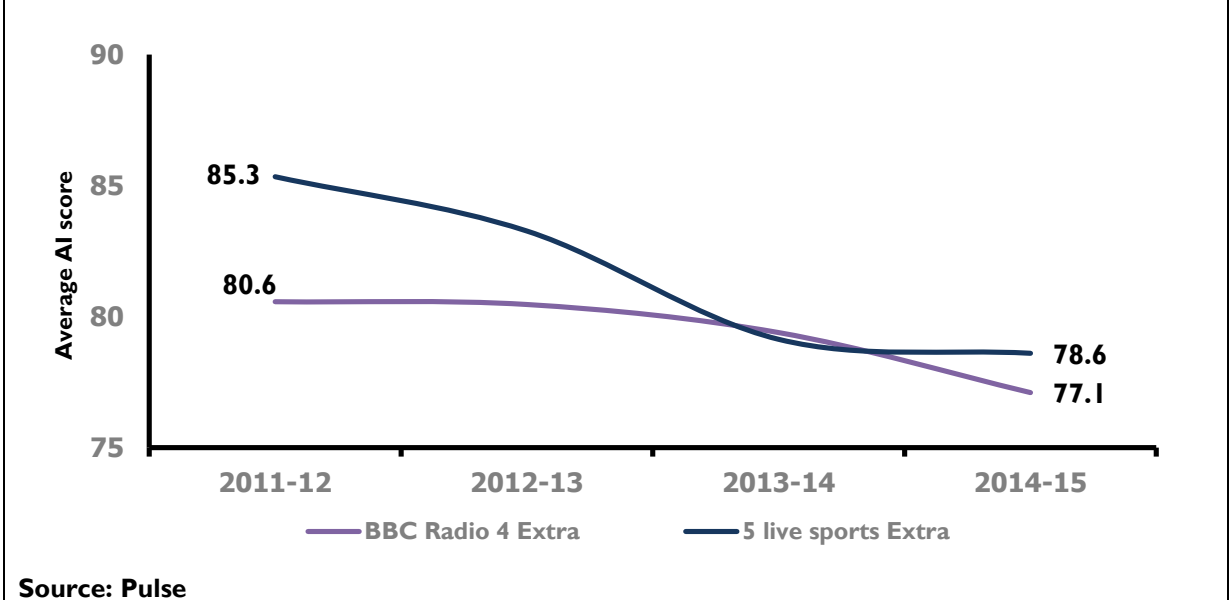
The chart below shows the average AI score by station by year. The appreciation index (AI) scores are calculated at an individual programme level – respondents in the survey are asked to rate the programme they watched out of 10. This is then aggregated into an index out of 100. Radio 4’s average AI score currently stands at 80.4 and has been consistent since 2011-12. Radio 5 Live has an average AI score of 78.3, having increased from 77.8 in 2011-12.

Figure 22: Average AI score by network station



There is a much greater variation to the average AI score of Radio 5 Live Sports Extra, which has lower sample sizes and is dependent on Ashes cricket coverage. The AI score stood at 78.6 in 2014-15 compared to 85.3 in 2011-12, a year in which England won an Ashes cricket series and therefore positively influenced the average AI score. Radio 4 Extra had an average AI score of 77.1 in 2014-15, having fallen from 80.6 in 2011-12.

Figure 23: Average AI score by digital station



Average AI score by Genre

**The average AI score for key Radio 4 genre News and Current Affairs increased between 2011-12 and 2013-14, however the AI score for Drama and Comedy declined heavily. News & Current Affairs and Sport on Radio 5 Live have had small increases over the same time period.**

News and Current Affairs on Radio 4 had an average AI score of 81.7 in 2014-15, having marginally risen from 81.1 in 2011-12. As with News on television, the average AI score remains constant and largely unchanged. Drama on Radio 4 has had a small decrease to average AI score. The Archers has the highest audience for all Radio 4 drama programming and the AI score fell from 82 to 81 between 2011-12 and 2014-15. Comedy has experienced a similar decline, with the average AI score dropping heavily from 79.8 to 78.9.

On Radio 5 Live, the average AI score for sport on increased from 78.7 in 2011-12 to 79.3 in 2014-15. News and Current Affairs, making up 75% of the schedule, also had a small increase to average AI score, rising from 77.3 in 2011-12 to 77.6 in 2014-15.

**Figure 24: Average AI score by Genre**

<b>Radio 4</b>	<b>2011-12</b>	<b>2014-15</b>	<b>+ / -</b>
Comedy	79.2	78.9	-0.3
Drama	81.4	79.9	-1.5
News & Current Affairs	81.1	81.7	0.6

<b>Radio 5 Live</b>	<b>2011-12</b>	<b>2014-15</b>	<b>+ / -</b>
News & Current Affairs	77.3	77.6	0.3
Sport	78.7	79.3	0.6

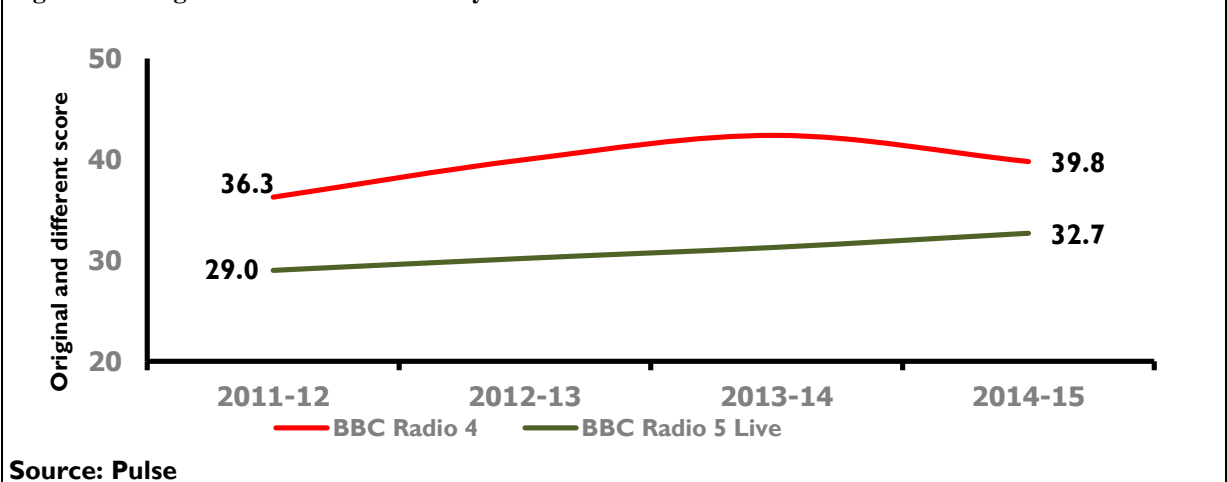
**Source: Pulse**

## Original and different scores

**Radio 4's average original and different score has increased over three years, while Radio 5 Live has a lower original and different score but has also increased since 2011-12.**

Radio 4 had an original and different score of 39.8 in 2014-15, having risen from 36.3 in 2011-12. Radio 5 Live had a score of 32.7 in 2014-15, having steadily increased from 29.0% in 2011-12. Only Radio 3 had a higher original and different score from the BBC network stations in 2014-15. Radio 3 had a score of 46.4, while Radio 2 had an average score of 40.6. Radio 1's original and different score was more in line with Radio 5 Live, scoring 28.9 in 2013-14.

Figure 25: Original and different score by network station



Both Radio 4 Extra and Radio 5 Live Sports Extra have fluctuating original and different scores. Radio 5 Live Sports Extra's original and different score increased from 46.7 in 2011-12 to a very high 53.9 in 2013-14, before falling to 45.0 in 2014-15. Radio 4 Extra also had a three year decline, from 40.7 in 2011-12 to 38.5 in 2014-15.

Figure 26: Original and different score by digital station

