BBC TRUST
Radio Service Review –
Radio 3, Radio 4 & Radio 7

Report on findings from
qualitative and quantitative research

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1. BACKGROUND & OBJECTIVES

1.1 Background

The BBC Trust must review each of the BBC’s services in-depth against its service licence once every five years. These service reviews look at how well the services are performing, as well as looking to the future to consider whether any changes should be made in order to reflect audience needs. This piece of audience research formed part of the review of Radio 3, Radio 4 and Radio 7. The assessment process also involved a public consultation, audience and industry stakeholder engagement events and performance data analysis.

This research was to provide an in-depth evaluation of each of the three stations in order to provide a more complete understanding of their performance. It was also to focus on contextualising the BBC’s public purposes in relation to the aims and audience of each station in order to determine where they are currently delivering, what matters most to listeners and highlight any key areas where it may be under delivering.

As a secondary objective, we also explored the extent to which each of the services were seen as delivering quality (and what contributed to audience perceptions of quality).

It should be noted that the radio stations under review for this research are not obliged to perform across all criteria for all purposes1.

1.1 Overview of the purposes

The Royal Charter is the constitutional basis for the BBC. It sets out the public purposes of the BBC, guarantees its independence, and outlines the duties of the Trust and the Executive Board. For each of these public purposes the BBC Trust has given the BBC a purpose remit. The remits show the priorities the Trust have set the Executive Board and how they will assess the Board’s performance against them.

The Charter defines the main objective of the BBC as the promotion of six public purposes. These are:

1. Sustaining citizenship and civil society (the citizenship purpose)
   - The Trust summarises this as: “You can trust the BBC to provide high-quality news, current affairs and factual programming that keeps you informed and supports debate about important issues and political developments in an engaging way. You can look to the BBC for help in using and understanding different kinds of media.”

2. Promoting education and learning (the education purpose)
   - The Trust summarises this as: “You can look to the BBC to help everyone in the UK to learn. An important role for the BBC is to support formal education in schools and

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1 Please note that the research was only looking at the extent to which Radio 3, 4 and 7 delivered against the BBC public purposes set out in the service licence for each.
colleges. In addition, the BBC will offer engaging ways for everyone in the UK to build their knowledge and skills across a broad range of subjects.”

3. Stimulating creativity and cultural excellence (the creativity purpose)
   • The Trust summarises this as: “You can expect the BBC to offer the best examples of creative work that engage and delight audiences, break new ground and encourage interest in cultural, creative and sporting activities.”

4. Representing the UK, its nations, regions and communities (the nations, regions and communities purpose)
   • The Trust summarises this as: “You can rely on the BBC to reflect the many communities that exist in the UK. These communities may be based on geography, on faith, on language, or on a shared interest such as sport. You can expect the BBC to stimulate debate within and between the communities of the UK, and to encourage people to get involved with their local communities.”

5. Bringing the UK to the world and the world to the UK (the global purpose)
   • The Trust summarises this as: “You can rely on the BBC to provide internationally-respected news services to audiences around the world and you can expect the BBC to keep you in touch with what is going on in the world, giving you an insight into the way people live in other countries.”

6. In promoting its other purposes, helping to deliver to the public the benefit of emerging communications technologies and services and, in addition, taking a leading role in the switchover to digital television (the digital purpose)
   • The Trust summarises this as: “You can expect the BBC to help everyone in the UK to get the best out of emerging media technologies now and in the future.”

1.3 Objectives
The overall purpose of the research was to inform the BBC Trust’s review of BBC Radio 3, 4 and 7 overall, but specifically in terms of:

• Impact: overall, to assess the extent to which these services were delivering on the BBC public purposes across audiences:
  - delivery against audience expectations
  - contribution of each station to audience perceptions
  - comparative importance of the purposes.

• Quality: To explore and define audience perceptions of ‘quality’ for each of these services.

The study was designed to also ensure:

• an in-depth understanding of audience perceptions of the importance of each purpose (and its defining criteria) in relation to each of the services.

• guidance, where appropriate, on areas where Radio 3, Radio 4 and Radio 7 could potentially contribute more to the BBC purposes and where this most strongly overlaps with value to audiences.

• insight into the relationship between audience perceptions of quality and the delivery of the BBC purposes.
2. METHODOLOGY

A three-stage process was conducted for this research, with more focus on the qualitative parts. The quantitative phase was a relatively small piece of quantification conducted with the audience who participated in the qualitative research sessions:

1. **Pre-session tasks** – in advance of the key audience sessions, once recruited all respondents were asked to complete a compact and creatively designed booklet where they were asked to note down on a daily basis:
   - radio consumption and engagement: what they listened to, how they listened to it (via which platform), why they listened to it, where they were, who they were with, what else they were doing, what mood they were in, their attention level (1-10 gauge) and their level of enjoyment (1-10 rating)
   - radio station audit: summary questions/grid at back of booklet to encourage respondents to start thinking about the areas covered by the purposes (without overtly prompting them on these). For example, of the radio stations that they listen to which would they associate with...being creative, being informative, embracing new technologies etc and why. We combined these with other relevant measures – e.g. being original, being innovative, quality.

   This encouraged respondents to think about their behaviour (prior to the group sessions) and allowed BBC performance measures to be put into the wider context of their station repertoire/listening behaviour.

2. **Quantitative survey** – this was conducted as part of the ‘pre-session tasks’. A structured survey was conducted with the respondents recruited for the qualitative research. A short paper questionnaire was provided as part of the pre-task pack. In this way 190 respondents participated in this short survey (see appendix 2 for the quantitative survey). Completed surveys were returned by post prior to the focus group sessions allowing us the opportunity to contextually discuss results of the survey during the focus groups. However, it was valuable in two further ways:
   - To give context to the qualitative insight because findings could be set in a clear framework of appreciation and impact
   - Acted as a ‘bridge’ between the qualitative research and the BBC Trust’s biannual tracking survey\(^2\); offering the opportunity to understand how the qualitative research respondents’ ratings compare to average.

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\(^2\) The BBC Trust commissions a quantitative survey twice a year to track perceptions of how the BBC, as a whole, has performed against its public purposes and each of the priorities within these. It is called the Purpose Remit Survey.
Findings from the quantitative survey have been reported within the main body of findings alongside the qualitative research.

The quantitative survey measured a variety of priorities within the purposes relevant to the specific radio station in question. Respondents rated each priority on a seven point scale in terms of the extent to which they believed the radio station delivered against this priority:

- Completely Disagree (1)
- Strongly Disagree (2)
- Slightly Disagree (3)
- Neither (4)
- Slightly Agree (5)
- Strongly Agree (6)
- Completely Agree (7)

Respondents also rated the extent to which they felt the priority was important for the radio station in question to provide:

- Completely Unimportant (1)
- Strongly Unimportant (2)
- Slightly Unimportant (3)
- Neither (4)
- Slightly Important (5)
- Strongly Important (6)
- Completely Important (7)

Respondents scores were aggregated together in order to produce the percentage of respondents selecting each point on the scale. Net top three ‘performance’ and ‘importance’ percentages scores were calculated by summing points 5, 6 and 7 on each scale. The term ‘performance gap’ is used throughout this report. This ‘performance gap’ is the net performance score minus the net importance score. A negative number means that the performance score given was lower than the importance score.
3. **Qualitative sessions** - 21 focus group sessions lasting 2 hours were conducted (10 recruited for 8 respondents to take part in each session). They were split in order to enable us focus on each of the three services, whilst still exploring the other stations and cross-over. A summary of the sample is below (Table 1):

<table>
<thead>
<tr>
<th>Station focus (and listener profile)</th>
<th>TOTAL GROUPS</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>21-34</td>
</tr>
<tr>
<td>Radio 3 - Heavier Listeners</td>
<td>5*</td>
<td>1*</td>
</tr>
<tr>
<td>Radio 3 - Lighter Listeners</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Radio 4 - Heavier Listeners</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>Radio 4 - Lighter Listeners</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Radio 7 – Mix of Listener frequency</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td><strong>TOTAL GROUPS</strong></td>
<td><strong>21</strong></td>
<td><strong>5</strong></td>
</tr>
</tbody>
</table>

* One ‘additional’ session was conducted with 21-34 year old heavy listeners to Radio 3 in Central London to complement the original session recruited for this listener profile due to low attendance at the original session.

- As indicated, key criteria for each of the services were:
  - *Age* – a spread of 21-34s; 35-54s and 55-75s
  - *Gender* – roughly evenly split (broadly reflecting audience profile)
  - *Mix of listening (types of programme/content)* – capturing a mix of listening times and programme types (within schedules of specified stations)
  - *Regularity of listening* - a mix of heavy, medium and light listeners as indicated in the table above
  - *Ethnic Diversity* – the sample was boosted to reflect the demographic profile of locations for fieldwork (specifically, London, Edinburgh and Bristol included a more ethnically diverse mix of listeners).

- Other criteria included:
  - Half of the respondents in Radio 4 sessions and two-thirds of respondents in Radio 3 sessions listened to other services (Radio 3, 4 or 7)
  - At least a couple of online/on demand listeners within each session (weighted by audience age)
A mix of locations, including an urban and rural spread. Chosen locations for fieldwork were Central London, North London, Thatcham, Helston, Bristol, Leeds, Saddleworth, Edinburgh, Fort William, Belfast and Swansea.

For the qualitative sessions, it was also necessary to explain the purposes and context to gain an understanding of the interpretation, importance and delivery of each of the BBC purposes in relation to the three stations.

Each session was structured to flow from an open exploration of audience perceptions of the stations to a more focused examination of how they were delivering against the purposes. This involved a range of tailored mapping and creative exercises to engage respondents and provide a more in depth understanding of perceptions and attitudes (see appendix 4 for the discussion guide).

Each session provided a specific focus in terms of one of the three stations, but also provided scope for comparative exploration of other stations being assessed and listeners’ wider radio repertoire.

The qualitative pre-task booklet and quantitative survey were conducted in early June 2010. The main qualitative fieldwork was conducted between 22nd June and 5th July 2010.
## EXECUTIVE SUMMARY

### 3.1 Radio 3

**Station Overview**

Radio 3 is intended to offer a mixture of music and cultural programming. Its core proposition is classical music and its speech based programming should inform and educate the audience about music and culture. Radio 3 should also feature jazz, world music, drama, the arts and ideas, and religious programming. Radio 3 also has an important role in providing opportunities for performance by the BBC orchestras, choruses and BBC Singers. Radio 3 broadcasts throughout the UK on FM radio, DAB digital radio and other digital media.

- Radio 3 was seen to be delivering strongly against the BBC public purposes for promoting education and learning and stimulating creativity and culture. Audiences felt it is a key source for classical music and provides a credible destination for highly creative and cultured music. It was also positioned by listeners as delivering strongly for ongoing learning. In particular, the lack of intrusions to the music (i.e. from discussion, news and advertising) and the richness and depth of information provided around the music on artists and composers creates unique value for the station, which was strongly appreciated by its core audience.

- Radio 3 was rated highly for quality perceptions, based on a combination of the station demonstrating a knowledge and passion for music (the choices, the presenting, the tone) as well as the audience perceptions that the station was well packaged (both the ‘smooth’ production and the branding and look/feel of Radio 3 which was seen as ‘modern’ and full of character).

- Compared to its key competitor, Classic FM, Radio 3 was perceived as more intellectual but also more inaccessible. Whilst this intellectualism was regarded as a strength for core audiences, it did reduce the station’s ability to engage lighter and potential new listeners.

- Attitudes to world music and cultural diversity on Radio 3 tended to vary across audiences but had most appeal amongst younger and lighter listeners.

- For some, the schedule was seen as lacking creativity and impact, particularly amongst the younger audiences (under 35s).

- It was also seen as performing less effectively in representing the UK as a whole, particularly by the audience based in Scotland and Northern Ireland where national representation was given a higher priority than amongst the English audiences.

- The audience highlighted a number of areas Radio 3 might consider:
  - Making more people aware of Radio 3’s overall offering and improving accessibility and engagement amongst lighter listeners and those with an interest in world music, jazz and classical music who do not currently listen to the station. This was seen as particularly important amongst younger audiences (under 35s). Listener ideas for
improving this engagement with a younger audience included building its profile via other BBC Radio brands and introducing more personalities (known voices) to Radio 3 scheduling.

- Ensuring the Radio 3 schedule feels fresh, introducing and promoting more creative or unexpected programme formats to sit alongside its core, established approach. This was seen as particularly important for engaging with newer audiences.

- Highlighting more clearly where and when to find world or alternative music within the Radio 3 schedule, and making more of this offering to engage with new audiences.

- Developing the role and value of the Radio 3 website. It was positioned as a potential educational resource, as well as offering the opportunity for listener interaction/shared experiences (which could be important for ‘communities’ of music lovers – especially genre specific to classical, world music and jazz).

- A few felt that more could also be done to promote the Red Button services available through the Proms coverage, linking it in with the BBC’s television coverage of the Prom’s (i.e. making more of across-platforms opportunities).

- Improving perceptions of regional and national coverage and inclusion. This was felt more keenly in the regions and nations furthest from London. Ideas included offering more localised concerts and events with opportunity to attend or listen live and ensuring that this regional dimension is clearly stated. It was acknowledged that this may already happen, but audiences did not notice or realise.

3.2 Radio 4

Station Overview

Radio 4 is a mixed speech service, offering in depth news and current affairs. It also offers a wide range of other speech output including drama, readings, comedy, factual and magazine programmes. The service should appeal to listeners seeking intelligent programmes in many genres which inform, educate and entertain. Radio 4 broadcasts throughout the UK on FM, long wave and medium wave radio, DAB digital radio and other digital media.

- Radio 4 was seen to be performing strongly against the BBC public purposes that its audience felt it was most important for Radio 4 to deliver against. In this respect the priority areas for delivery were for sustaining citizenship and civil society, promoting education and learning, bringing the UK to the world and world to the UK and stimulating creativity and cultural excellence.

- In addition, delivery against these key purposes was seen as key in maintaining perceptions of the quality of the station. Overall, listeners described Radio 4 as offering a distinct and unique service in terms of both its schedule and overall tone.
• The station’s news and current affairs output was particularly highly valued and seen as playing a central role in delivery against the purposes.

• Radio 4 scored particularly well on quality perceptions (with nobody seeing the station as delivering poor quality output). The audience saw many elements of Radio 4 to be contributing to the overall ‘quality’, although typically they struggled to articulate what drove quality perceptions. Within the qualitative research, presenters (described as knowledgeable, passionate, intelligent, accessible) and programming (variety and depth) were a primary focus for delivery on quality output. Additionally, production (high standards) and overall tone (serious, intelligent and challenging) were seen as contributing to quality perceptions.

• The two areas where Radio 4 was perceived as delivering less effectively were for reflecting the UK’s nations, regions and communities and emerging communications. However, these were also both of lower importance to Radio 4 listeners overall, for both lighter and heavier listeners alike.

• The audience highlighted a number of areas Radio 4 might consider:
  o Finding opportunities to engage new and younger listeners (away from its core 55-75 demographic).
  o Encouraging lighter listeners to engage with the station further by ensuring that the schedule and its content felt contemporary and innovative, alongside established programming crucial to the core, loyal audience.
  o Promoting the availability, ease and benefits of listening to Radio 4 content via the Internet (the iPlayer and indirectly via Radio 4’s own website) and across other newer platforms. Conversely, this perceived lack of publicity was also seen as a strength of the service. In particular older, heavier listeners were keen that Radio 4 did not heavily publicise methods of listening and catching up that did not fit their behaviour (and were seen as intrusive).
  o Providing recognised quality regional and national portrayal across Radio 4 content, which was more important the further the audience were living from London.
  o Countering any perceptions of the station as ‘essentially white, middle class and English’ by emphasising examples of diversity (e.g. the mix of religions covered by Thought for the Day).
  o Considering any potential routes for increasing the relevance and role of Radio 4 in younger people’s education.
3.3 Radio 7

**Station Overview**

Radio 7 is a speech based entertainment service and its schedule should include comedy, drama, stories, features, readings and programmes for children. Most output should come from the BBC archive, but the station should commission some original content, particularly of types of output rarely found in BBC Radio. Radio 7 is available on DAB digital radio and other digital media.

- Radio 7 was seen as having a distinct identity and was highly valued by its listeners. Engagement with the station varied across audiences, with younger listeners claiming to be discovering ‘classic’ content for the first time through to older audiences enjoying the nostalgic output.

- The existence of Radio 7 and how it was packaged and delivered encouraged listeners to see it as delivering well against the creativity purpose and the digital purpose (despite the content being widely recognised as mainly repeats).

- The consistent standard of content and the value placed on the listening experience were driving quality associations for Radio 7. Quality was defined as provision of ‘classic programmes’ (carefully picked programmes seen as BBC classics) and niche content unavailable elsewhere) as well as ‘highlighting smart writing and standards of adaptations’ (well chosen examples of classic programming emphasising the BBC’s talent for writing and acting). In addition, high standards of production and an involving, immersive and engrossing listener experience contributed to perceptions of high quality.

- Radio 7 also had a valued role amongst parents in relation to their children’s development (creativity and education and for younger children, where noted, the CBeebies content was appreciated).

- However, listeners struggled to identify Radio 7 with representing different parts of the UK or communities or why this should be part of the station’s remit.

- The audience highlighted a number of areas Radio 7 might consider:
  - Increasing levels of awareness of Radio 7’s offering to potential audiences - for example via cross-promotion on Radio 4 (where a number of the shows were originally broadcast).
  - Ideally, incorporating and highlighting new and original content within the Radio 7 schedule, such as new comedy.
  - Building on and promoting the station’s engagement and educational value for younger audiences, with some parents particularly impressed with its offering aimed at children.
  - Potential development of a role for Radio 7 in relation to its special interests. For example, there was some more niche interest in the station doing more to promote itself as a comedy or science fiction community ‘destination’.
4. RADIO 3

Station Overview

Radio 3 is intended to offer a mixture of music and cultural programming. Its core proposition is classical music and its speech based programming should inform and educate the audience about music and culture. Radio 3 should also feature jazz, world music, drama, the arts and ideas, and religious programming. Radio 3 also has an important role in providing opportunities for performance by the BBC orchestras, choruses and BBC Singers. Radio 3 broadcasts throughout the UK on FM radio, DAB digital radio and other digital media.

4.1 Associations

We asked respondents to give the key words they associate with Radio 3 and they spontaneously described it as an intelligent and informative destination for classical music, but it was also seen as potentially difficult to engage with. The key words that were used by the audiences in the qualitative discussions when describing Radio 3 were: informative, relaxing/calming, knowledgeable, intelligent, in-depth, high brow, cultural, inspiring, contemporary, challenging, difficult (for lighter listeners), heavy (for lighter listeners). They also commented that it was not: mainstream, commercial, accessible (for lighter listeners), particularly well known, full of personalities, commercial, or patronising (which was a positive association).

A key term used to describe Radio 3 was informative. This was reflected in its breadth and depth of knowledge about music and its ability to bestow that knowledge on its audience.

“There’s more behind Radio 3, there’s much more depth to it.”

21-34/Heavy/London

Radio 3 was also widely described as relaxing and calming. It was described in various ways as ‘escapism from the more mundane elements of day-to-day life’, whether this was listening at home or driving (positioned by its audience as two key listening times).

“It’s an island of sanctuary away from my day to day life.”

35-54/Light/Leeds

“It’s about relaxation for me. It’s my time to de-stress.”

35-54/Heavy/Saddleworth

On the other hand, the audience also identified that Radio 3 was not particularly mainstream. Respondents felt it rarely played or focused on ‘the popular classics’ and spent more time on fairly obscure or more highbrow elements of music history. This was a criticism from some, especially lighter listeners, but a strength of the station for other, often heavier listeners.
“It’s not got mass appeal but it’s very important that this music is played, who else would do it?”

55-75/Heavy/Swansea

Similarly, Radio 3 was described as not particularly ‘accessible’, and this made the station harder to ‘dip in and out of’ for lighter classical or world music listeners. Some lighter listeners (and even a few of the more regular listeners) described Radio 3 as a bit ‘heavy’ at times. This was seen as indicating that some programming was aimed squarely at the connoisseur to the exclusion of a more mainstream audience.

“It doesn’t feel like they’re trying to reach a wider audience.”

21-34/Heavy/London

“I think it could dumb down a little. It’s a bit pleased with itself.”

55-75/Heavy/Swansea

Radio 3 was also not seen as particularly personable. There was some criticism that the station also lacked familiar voices to help personalise the service a little more, and help make it more approachable for the non-connoisseurs.

4.2 Quality

In the quantitative survey, nearly half the listeners gave Radio 3 a score of eight or more out of ten for quality and only 1 per cent rated the station as poor quality. The key scores were:

- 48% rated the quality as good;
- 46% did not feel strongly either way, and;
- 1% rated the quality as poor.

Source: Pre-task quantitative survey; Question: How would you rate BBC Radio 3 in terms of overall quality on a scale of 1 to 10? Where 1 = extremely poor quality and 10= extremely good quality?; Base: c. n=98

In the qualitative research, respondents suggested that the music policy and focus of Radio 3, combined with its knowledge, passion and packaging, defined these perceptions of quality. In terms of the music itself, quality was demonstrated by a deep understanding of and appreciation for classical music, not just the more popular classics (which audiences felt Classic FM was providing). The station was also seen as informative, reflected by the depth of information and history about music. Respondents felt presenters were knowledgeable, passionate and thoughtful and that considerable research had been put into programme output.

“It’s about knowledgeable presenters and challenging music – it feels superior.”

35-54/Heavy/Saddleworth
Quality was also closely associated with the tone and production of the station. Listeners felt the tone was intelligent and enthusiastic and presenters were not perceived as patronising.

“They understand their audience, they give you a chance to reflect.”
35-54/Light/Leeds

Quality radio production was seen as being demonstrated by the intensity of the music, the clarity of the sound and smooth production values as well as the overall ‘package’ – the branding and look/feel of Radio 3 which was seen as modern and full of character.

“Because it’s part of the BBC, isn’t it. … It’s just brand image. The logo, its modern, it looks better.”
35-54/Light/Leeds

There were a few areas which the audience felt compromised the overall quality of the Radio 3 package. It was perceived as lacking profile. There was a the lack of known voices on Radio 3 which was a barrier to engagement with those lighter listeners who wanted a slightly less high-brow schedule, and to feel ‘welcomed in’ by a familiar voice.

“I can’t think of a presenter’s name. They’re a bit faceless.”
21-34/Heavy/London

For some, the station was seen as inaccessible, and the intensity of the station’s focus on ‘more obscure’ classical offerings made some feel it was too elitist, and they wanted more acknowledgement of more popular classics from time to time.

“I just wish they did an hour of easy listening classics. I’d love that.”
55-75/Light/Bristol

There was also a sense that the schedule was too formulaic, which could be a reason for not listening. For example, it was suggested that choice of composer in Composer of the Week could make or break the listener’s propensity to tune in depending on whether they loved or loathed the choice.

“If I don’t like the composer that’s me done for the week. Actually, thinking about it, that might mean I don’t really listen that week, as it’s usually the reason I switch over to 3, to catch that.”
55-75/Light/Bristol
4.3 Value for money
For the majority of the audience, quality of content drove perceptions of value for money. However, many struggled to judge value for money for the service in isolation, especially the lighter listeners who dipped in and out of the service. The overall scores were:

- 41% felt Radio 3 represented very good value for money;
- 45% felt it was fairly good and;
- 6% felt it was fairly poor or very poor.

Source: Pre-Qualitative Survey; Question: The licence fee, which pays for all BBC services, costs £145.50 per year and must be paid by every household with a colour television. Of the £145.50 a total of £2.18 goes towards BBC Radio 3. To what extent do you feel that BBC Radio 3 represents value for money, for you and your household? Base: c. n=98

The figures above indicate that value for money ratings were very positive for Radio 3, although not quite as strong as those for Radio 4 (see page 33).

Radio 3 was positioned by its audience as the key destination for quality classical music and its value for money was increased by a belief that programming was informative and presenters particularly knowledgeable about their subject matter.

However, those who felt it lacked value for money felt it could do more to increase its accessibility and levels of awareness of the depth and breadth of what it offered beyond classical music.

"I just wish it was less heavy. I think it'd be more value for money if I felt able to listen to it more. But sometimes I just can't, the stuff they play isn't for me…"

55-75/Lighter/Bristol

4.4 Contribution to purposes: overview
Overall, Radio 3 was positioned as delivering strongly for the education purpose in terms of ‘learning new things’, as well as performing well for the creativity and the global purposes. Areas where audiences felt delivery was less convincing were in the digital and nations, regions and communities purposes. Chart 1 provides an overall performance hierarchy from the qualitative and quantitative research for Radio 3.

**Chart 1: Performance ranking for Radio 3**
4.5 Radio 3’s contribution to each purpose

4.5.1 Education purpose

Chart 2 highlights the overall rating of importance (in red) and performance (in blue) for delivery against the question under the education purpose. This highlights how effectively Radio 3 is meeting listener demands and expectations with performance in terms of learning new things while enjoying programmes or content on Radio 3.

**Chart 2: Performance vs. importance rating for Radio 3 on promoting education & learning**

<table>
<thead>
<tr>
<th>Importance</th>
<th>Performance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>75</td>
<td>76</td>
<td>-1</td>
</tr>
</tbody>
</table>

*Source: Pre-task quantitative survey; How important is it that…. / How much do you agree that….. Gap = Performance – Importance (negative = under delivery). Base: c. n=98*

75 per cent of respondents claimed to have learned new things while enjoying content on Radio 3. The qualitative findings indicated that people found Radio 3 continuously taught them new things about music, and that they could pick up new information nearly every time they listened.

“It’s not here and there you learn things, it’s all the time. It’s a constant thing.”

35-54/Heavy/Helston

The respondents claimed they had learned about new pieces of music and new interpretations of classical pieces through listening to Radio 3. Sometimes it was via the station that they first heard a particular composition. There was also evidence of listeners learning more about the history of music and musicians via the station; information which was described by some as ‘rich’ and ‘in considerable depth’ about the origins of an instrument or the evolution of a type of music or a musician’s career.

“It’s sometimes about the instrument, I’m sure I heard something about the harpsichord and how it evolved.”

55-75/Light/Bristol

It was frequently suggested that Radio 3 also offered a deeper understanding of the background on composers and artists, rather than just playing selected pieces of the music in isolation.
“It gives you the whole story, not just the music but finding out about the composer’s life.”

35-54/Heavy/Leeds

“You are always learning something about the composer’s life, so it is educational.”

55-74/Heavy/Swansea

There was evidence of listeners being informally educated by Radio 3 across the schedule, with particular programmes more frequently highlighted by the audience as having key educational qualities:

- **Composer of the Week** – was the most regularly mentioned, and seen by listeners as offering in-depth study on a particular musician, focusing on different aspects of their work for each edition, but also seen as providing coverage of less widely known composers.

  “I’m sure they did something on Minimalists once. It was a bit weird, but I learned something and it shows they don’t do just the obvious names.”

  21-34/Heavy/London

- **Night Waves** – listened to by a few loyal listeners in this research, it was seen as a high-brow arts review programme which delved into issues in considerable depth.

  “It can get a bit heavy at times but you get the impression these are people who really know what they are talking about.”

  35-54/Heavy/Helston

- **Late Junction** – particularly popular with a small but loyal listenership within our sample (including a higher proportion of the younger listeners) who claimed to enjoy the eclectic mix of music offered. Listeners claimed they learned about a lot of new forms of music or musical movements in different countries.

  “The different presenters like different things. Some are into jazz, others love more ambient things. It’s a mish-mash but it definitely teaches you about different types of music.”

  21-34/Heavy/London

- **Music Matters** – the magazine programme for classical music which listeners claimed kept them up to speed on what was happening in the world of classical music.

  “I caught a debate about whether Opera is still important the other week on that lunchtime programme. It was quite interesting.”

  55-75/Heavy/Edinburgh
Where could delivery be improved (promoting education and learning)?

Amongst some listeners there was an appeal for Radio 3 to do more to engage with and educate younger audiences (under 35s) about music history. Routes identified by the audience for improving delivery on promoting education and learning that did not rely on formal educational means included increasing awareness of Radio 3 and introducing more personalities or voices to bring the brand to a wider (and younger audience).

“It doesn’t feel like they’re trying to tap into the next generation of listeners.”

35-54/Light/Leeds

In a few groups it was suggested that promoting or linking Radio 3 content to recognisable personalities may aid recognition and engagement, including talking to a well known DJ/artist/sportsman about their love of classical music, or linking into and building on BBC Radio (and TV) brands with more appeal and relevance amongst younger audiences (e.g. Radio 1, 1xtra).

“They could cover the Electric Proms alongside the Proms, do some sort of compare and contrast. Link into Radio 1 on it, or something.”

21-34/Heavy/London

It was also suggested that more formalised educational support could be offered by the station for teachers and students (e.g. via online learning).

“Why don’t they link into the children’s learning bit, is it Bitesize? I’d have thought they could provide some useful links for music students.”

35-54/Light/Saddleworth
4.5.2 Creativity purpose

Chart 3 shows the high level of importance attributed to delivery of stimulating creativity and culture for Radio 3 audiences, but also highlights how performance largely matched expectations (or sometimes even exceeded them).

Chart 3: Performance vs. importance rating for Radio 3 on stimulating creativity and cultural excellence

<table>
<thead>
<tr>
<th>Description</th>
<th>Performance</th>
<th>Importance</th>
<th>Performance Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 3 helps me enjoy my interest in music</td>
<td>84</td>
<td>88</td>
<td>-4</td>
</tr>
<tr>
<td>BBC Radio 3’s mix of live and recorded music enhances my enjoyment of the station</td>
<td>82</td>
<td>83</td>
<td>1</td>
</tr>
<tr>
<td>The performances by the BBC Orchestras and BBC Singers on BBC Radio 3 increases my enjoyment of the station</td>
<td>82</td>
<td>82</td>
<td>0</td>
</tr>
<tr>
<td>BBC Radio 3 encourages me to engage with the world of music and arts</td>
<td>75</td>
<td>81</td>
<td>6</td>
</tr>
<tr>
<td>BBC Radio 3 has a wide range of enjoyable and entertaining programmes and content eg drama, music</td>
<td>74</td>
<td>77</td>
<td>3</td>
</tr>
<tr>
<td>BBC Radio 3 provides programmes and content which cover a wide range of cultural and creative activities</td>
<td>69</td>
<td>71</td>
<td>2</td>
</tr>
<tr>
<td>BBC Radio 3 has programmes and content that are inventive and imaginative</td>
<td>65</td>
<td>69</td>
<td>-4</td>
</tr>
<tr>
<td>BBC Radio 3 introduces me to new presenters, actors, writers and musical artists from the UK</td>
<td>68</td>
<td>81</td>
<td>13</td>
</tr>
<tr>
<td>BBC Radio 3 has lots of fresh and new ideas</td>
<td>53</td>
<td>66</td>
<td>-13</td>
</tr>
<tr>
<td>BBC Radio 3 introduces me to new interests, hobbies and passions</td>
<td>56</td>
<td>61</td>
<td>-5</td>
</tr>
<tr>
<td>BBC Radio 3 plays a part in shaping the UK arts agenda</td>
<td>60</td>
<td>76</td>
<td>16</td>
</tr>
<tr>
<td>BBC Radio 3 helps me enjoy my interest in drama</td>
<td>51</td>
<td>57</td>
<td>-6</td>
</tr>
<tr>
<td>Programmes or content on BBC Radio 3 sometimes make me want to take part in a specific event or activity</td>
<td>36</td>
<td>43</td>
<td>-7</td>
</tr>
</tbody>
</table>

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that…… Gap=Performance – Importance. Base: c. n=98

For the vast majority of the audience, the musical output and focus of Radio 3 naturally created strong associations with the creativity purpose. 84 per cent of respondents agreed that Radio 3 ‘helps me enjoy my interest in music’ and this was also the most important objective for listeners (with 88 per cent agreeing it was important).
“The whole radio station is based on the arts, it’s a cultural thing.”
55-75/Heavy/Edinburgh

“I think it’s at the forefront for some areas of music, like jazz.”
35-54/Heavy/Saddleworth

The research also highlighted the station’s strong performance against other key criteria, with the audience praising the station for its creativity, quality and emphasis on the music itself. Passion and enthusiasm for the music was conveyed by presenters and production, along with their perceived ability (along with the music) to stimulate the creativity within the listener.

The station was also seen to have a key role in contributing to the UK arts agenda, and was seen to be performing above expectations. It was also widely seen as offering a depth of knowledge and engagement in a diverse range of music (especially classical, world and jazz).

“Shows like Late Junction showcase a lot of unusual, weird and wonderful music. There’s no-one else playing that role.”
21-34/Heavy/London

“I like the jazz on it and if you think about it, where else would you get it if it wasn’t on Radio 3?”
35-54/Heavy/Helston

“You just stumble across some programmes but I like the church music and that is part of British culture”
35-54/Heavy/Helston

Radio 3 also had the ability to engage the audience in a wider cultural focus beyond the music (e.g. art, history) with 81 per cent agreeing that Radio 3 managed to engage people in the world of music and arts.

In addition, the mix of live and recorded music was seen as well balanced and helped to continually engage and intrigue the audience, across diverse forms of music (83 per cent stated that Radio 3 delivered on a good mix of live and recorded music).

However, there were some more mixed attitudes expressed on the extent to which the station delivered creativity in other areas. In particular, some of the audience felt the schedule was lacking in variation and could be seen as a bit habitual, especially by lighter listeners with a propensity to dip in and out of station.
“I think it’s a bit predictable at times. Like if you don’t like the composer of the week, you know instinctively not to turn it on for that. There’s no surprise there. It’s kind of shut you out.”

55-75/Light/Bristol

In contrast, the majority of heavier listeners enjoyed the consistency in the schedule and found this a strength of the service.

“I like knowing that when you turn on at 1 o’clock it’s the lunchtime concert. Or if it’s a composer you enjoy who’s composer of the week, you know to turn on at 12. I like that certainty.”

55-75/Heavy/Edinburgh

Reflecting on Radio 3’s contribution to art and culture, it was also apparent that listeners, both heavier and lighter, were not aware that it offered both classic plays and newly commissioned drama in their schedule.

“I wasn’t aware of the plays. Maybe that’s just to do with when I listen. It’s more routine, more in the mornings and at night.”

35-54/Heavy/Helston

Where could delivery be improved (stimulating creativity and cultural excellence)?

More was expected of Radio 3 in terms of delivering ‘fresh and new ideas’. 53 per cent of the audience agreed that Radio 3 had lots of fresh and new ideas. 66 per cent of the audience felt this was important for the station to deliver on. This perception that the schedule and approach was quite predictable was most keenly felt amongst younger and lighter listeners.

Respondents suggested some ideas for improving performance in this area. These included introducing more creative programme formats within the current schedule and not relying on ‘the tried and tested’ formulas for presenting programmes.

“It has different ideas about how to present classical music, but they use those same ideas again and again.”

21-34/Heavy/London

In addition, it was suggested that more could be done to highlight and promote the more creative or diverse content within the schedule (e.g. the world music and eclectic offerings of Late Junction).

“I think that it could be more creative by introducing me to more contemporary and alternative classical music.”

21-34/Heavy/London
There were also some indications that the station did not encourage participation in 'specific events or activities’ with some regional split between London and everywhere else on the ability to get involved in events. In particular, the focus of the Proms, which was widely recognised as a key Radio 3 event, was seen as centred on London.

“There’s no BBC concerts to go to unless you live in London”
21-34/Light/Fort William

4.5.3 Global purpose
Overall, Radio 3 was seen to deliver on this purpose, although different views and attitudes were expressed depending on individual levels of interest in world music. As illustrated in Chart 4, 60 per cent of listeners felt that Radio 3 ‘helps me understand and appreciate different cultures and lifestyles from around the world’ (and 64 per cent viewed this as important).

Chart 4: Performance vs. importance rating for Radio 3 on bringing the UK to the world and the world to the UK

<table>
<thead>
<tr>
<th>Performance</th>
<th>Importance</th>
<th>Performance Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>60</td>
<td>64</td>
<td>-4</td>
</tr>
</tbody>
</table>

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that….. Gap = Performance – Importance (negative = under delivery). Base: c. n=98

In the discussions, there was fairly widespread knowledge about Radio 3 covering world music as part of its late night schedule, although only a few were able to identify programme titles (e.g. Late Junction).

“They do things like indigenous drumming from Papua New Guinea late at night. I don’t listen to it, but it’s covered.”
35-54/Heavy/Helston

“You get some really far out there stuff on there, if you want it I’m sure you could find it.”
55-74/Heavy/Swansea

Across the sample there were very mixed views on world music and how it was covered on Radio 3. Typically, there was more interest in shows such as Late Junction expressed by a younger audience and those with more niche or eclectic musical tastes.

“I think it’s great. It offers a brilliant mix, really out there.”
21-34/Heavy/London
Listeners felt a key strength of the wider coverage on Radio 3 that ‘helped listeners understand and appreciate different cultures and lifestyles from around the world’ was placing music in the context of culture and ways of life of indigenous communities from around the world. In addition it offered classical (and other) concerts from different parts of world as well as biographical details about how composers wrote and performed their works, providing a glimpse into the historical context of their lives.

“It does tell you about the lives of composers and where they lived. So it does in that way.”

55-75/Light/Bristol

A criticism of Radio 3’s contributions to delivery against this purpose identified by the audience included some listeners who struggled to find world music within the schedule; they perceived there was a lack of clearly defined programmes and of signposting or referencing. A few also felt that the world music was too often focused on Europe rather than looking further afield.

“It doesn’t feel like it’s always pushing the boundaries of different types of music. It’s [Late Junction] a bit focused on areas such as Eastern Europe, rather than going outside its comfort zone.”

21-34/Heavy/London

Where could delivery be improved (bringing the UK to the world and the world to the UK)?

In terms of the global purpose, Radio 3 was performing well for 60 per cent of listeners. Therefore some of the audience felt there could be potential opportunities to increase awareness of world music on Radio 3, and to ensure that world music is clearly promoted within the schedule. Currently, with the exception of a small number of heavy listeners or niche music lovers, specific programme examples of contributions to the global purpose were lacking.

“More could be done to make you aware of other things bar the classical music. I know they do some shows late at night that do other things, but I don’t hear much about it. It’s not advertised much, I don’t think.”

21-34/Light/Fort William

However, it was also requested by many of the listeners that any consideration of increasing diversity in musical choice should have minimal impact on core classical music output enjoyed by the majority of the station’s core audience.

4.5.4 Citizenship purpose

The citizenship purpose was not regarded a priority for Radio 3 listeners, although current news output was generally meeting audience expectations and needs. As shown in Chart 5, 61 per cent felt that Radio 3 ‘provides high quality independent news bulletins’ (meeting expectations, which were much lower than those for Radio 4). It was also making ‘news and current affairs and other
topical issues interesting’ to its listeners (56 per cent felt it achieved this, compared to 58 per cent who felt it was important).

**Chart 5: Performance vs. importance rating for Radio 3 on sustaining citizenship**

```
<table>
<thead>
<tr>
<th>Performance</th>
<th>Importance</th>
<th>Performance Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>60</td>
<td>61</td>
</tr>
<tr>
<td>BBC Radio 3 provides high quality independent news bulletins</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>56</td>
<td>58</td>
<td>-2</td>
</tr>
<tr>
<td>BBC Radio 3 makes news and current affairs and other topical issues interesting to me</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that…… Gap = Performance – Importance (negative = under delivery). Base: c. n=98

Radio 3 listeners did not see the station as a destination for news, but were happy with short bulletins that informed them and allowed them to make the choice to then follow up on any relevant/interesting stories. In many instances, this meant being prompted to tune to Radio 4 or the BBC News online to catch up on more detailed new stories.

“I appreciate the quick updates, it saves me turning over to 4 during the day.”

21-34/Light/Fort William

“It’s not why I go there….if I want news I’ll go to Radio 4.”

25-34/Light/Leeds

“There are bulletins, but it’s just that. Brief bulletins.”

55-75/Light/Bristol

Radio 3 news bulletins were often compared to Radio 4 news in terms of tone and professionalism - although delivered in much less depth.

“They’re kind of Radio 4 standard [bulletins on Radio 3], which is good. They’re not poorly delivered.”

35-54/Heavy/Saddleworth

“It’s like a much shorter version of the Radio 4 news.”

35-54/Radio 4 Light/Belfast

Positively, it was seen as having only a minimal intrusion on the music which suited the majority of the audience.
“I can’t seem to concentrate on the voice on Radio 3. So I don’t really take the bulletins in.”

55-75/Heavy/Edinburgh

Where could delivery be improved (sustaining citizenship)?

Radio 3’s current delivery of the citizenship purpose was in line with audience requirements. Some of the audience wanted to see the frequency of news coverage around breakfast scheduling slightly increased, mainly due to a greater perceived need for news at that time of day.

“They could have slightly more news in the morning maybe.”

55-75/Heavy/Edinburgh

That said, regular listeners to the breakfast show were more resistant to changes and felt it was important to minimise the impact of increased news coverage on enjoyment of the music.

“I don’t want bloody news in the morning, that’s what I’m trying to get away from. Go to Radio 4 for that.”

35-54/Heavy/Saddleworth

4.5.5 Digital purpose

There were mixed attitudes to Radio 3’s delivery on the digital purpose, with some confusion evident over the station’s online and interactive offerings.

Chart 6: Performance vs. importance rating for Radio 3 on emerging communications

<table>
<thead>
<tr>
<th>Statement</th>
<th>Performance</th>
<th>Importance</th>
<th>Performance Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 3 encourages me to go to content that I find enjoyable or</td>
<td>52</td>
<td>52</td>
<td>1</td>
</tr>
<tr>
<td>useful on interactive TV e.g. BBC red button service providing additional</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>coverage of music events e.g. The Proms</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BBC Radio 3 provides quality content that I find enjoyable or useful on</td>
<td>44</td>
<td>49</td>
<td>-5</td>
</tr>
<tr>
<td>the internet e.g. <a href="http://www.bbc.co.uk/radio3">www.bbc.co.uk/radio3</a>, iPlayer</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Pre-task quantitative survey; How important is it that…. / How much do you agree that…… Gap = Performance – Importance (negative = under delivery). Base: c. n=98

Chart 6 indicates that Radio 3 was underperforming in terms of ‘providing quality content that I find useful or enjoyable on the internet’ (only 44 per cent agreed that Radio 3 provided this, whilst 49 per cent felt it was important). The qualitative research revealed that a key reason for this was the lack of awareness of and/or regular usage of the Radio 3 website. That said, where used, both the Radio 3 website and the iPlayer catch-up options were valued, particularly by the younger audience.

“Radio 3 has the benefits of iPlayer, you don’t get that with Classic FM.”

21-34/Regular/London
Positively, some were keen to praise Radio 3’s website in terms of ease of use and clarity of navigation. It had been used by a minority to seek further historical context to what they had been listening to, and in a few instances to ‘listen again’ to previously missed programmes in a series (e.g. Late Junction, or Composer of the Week).

However, amongst those respondents more aware of what the online offering provided, a lack of convenience was the key barrier to further usage, with the option of looking for further information online not fitting in with their regular listening occasions (e.g. in the car or in the garden).

“I have used the online site to get some information on composers. Not much though, as it’s not usually convenient.”

55-75/Light/London

53 per cent also felt that Radio 3 encouraged them ‘to go to content that I find enjoyable or useful on interactive TV’. This was in line with perceived importance levels.

A few listeners indicated they had made some limited usage of the Red Button for the Proms. However, awareness of this option was relatively low, even amongst those who had used other BBC interactive content.

“It’s great for extra bits around the Proms – I only discovered it last year.”

35-54/Heavy/Helston

“I use it for Glastonbury and Wimbledon, but I hadn’t thought about using it for the Proms.”

21-34/Regular/London

Whilst only 16 per cent claimed that Radio 3 did not encourage further engagement through the Red Button, 30 per cent were unable to give an answer in the quantitative survey, indicating a high lack of awareness and interest in this area.

Where could delivery be improved (emerging communications)?

Overall, some of the audience felt there was a need for greater promotion of Radio 3 digital services and to look for potential opportunities to increase website engagement and value (although it must be acknowledged that other more traditional, often heavier listeners were less keen on change).

A suggested area that would allow Radio 3 to improve the delivery on this purpose was BBC services placing greater emphasis on fully promoting the availability, ease and benefits of Radio 3 content on iPlayer, website and interactive TV (i.e. via promotions on radio and on TV).

It was also widely felt that there was an opportunity to increase engagement with younger audiences online, with ideas including providing an online destination for music studies.
In addition, there was also an audience perception that more could be done to maximise the value of the website, including provision of a wider range of content and links tied in to featured composers and artists, live streaming of concerts and video clips (also available to download), possible tutorials from established guests and utilising Twitter or Facebook more effectively (tie in/promotion with social networking sites).

“If you’re talking about younger people, it (Radio 3) doesn’t use the internet as much as it could.”

21-34/Regular/London

4.5.6 Nations, regions and communities purpose
Respondents felt there was scope for Radio 3 to improve its delivery on the nations, regions and communities purpose, specifically around delivery in local communities, and content catering for their area (which was felt more pointedly in the nations - Scotland, Wales and Northern Ireland).

As indicated in Chart 7 (below), at an overall level, 79 per cent agreed that Radio 3 ‘keeps me up to date and informed about UK arts and culture’ (closely matching perceived importance at 77 per cent agreement). There was stronger agreement in London than in the regions, and stronger in England than in the other nations (Scotland, Wales and Northern Ireland).

Chart 7: Performance vs. importance rating for Radio 3 on reflecting the UK’s nations, regions and communities

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that….. Gap = Performance – Importance. Base: c. n=98
Radio 3 was seen by listeners as underperforming for portraying and providing content for communities, regions and nations with low levels of agreement and many more offering no opinion in the quantitative survey.

In the qualitative research listeners offered some examples of Radio 3 representing different parts of UK, particularly in relation to live concerts with a few recalling concerts held in different parts of the UK.

“*You get live concerts from places like Manchester and Dublin.*”
35-54/Lighter/Leeds

There was also some recall of coverage of regional orchestras and choirs, including regional-specific music or venues. For example, although there was low awareness of the BBC National Orchestra of Wales, coverage of them was particularly valued by the audience in Swansea.

“*It’s good to hear your national choir, it makes you feel proud. Nice to know you’ve been noticed.*”
55-75/Heavy/Swansea

“I was listening to a lovely concert from York Minster the other day.”
35-54/Lighter/Bristol

“They have orchestras from Birmingham and Cardiff and different parts of the UK.”
21-34/Heavy/London

However, the respondents’ perception was that there was a ‘London bias’ with regards to the focus of particular events, including the Proms. Many felt they had limited opportunities to attend BBC concerts and events, especially around the Proms – when the majority of the events were seen as being held in London.

“I thought the Proms was fairly centred on London. It’s not something you hear about up here, that’s for sure.”
21-34/Light/Fort William

A few also queried the cultural diversity of the music on offer from the schedule. These were mostly a minority of world music fans with a perception that Radio 3 was too focused on the classical music of white, European musicians of the last few centuries and not offering enough scope for music from other cultures or communities.

“It’s just always a bit easier to go for the European classical composer than offer something new, fresh from elsewhere in the world.”
21-34/Heavy/London
Many of the core elements of the purpose lacked impact because many felt they had no strong view either way on the issues, indicating low levels of awareness for many aspects of the purpose. In addition, it indicated that some of the criteria held little sway on their interest in the programmes.

“Hard to say, I don’t really take in where the music’s coming from, just whether I like it.”

35-54/Heavy/Saddleworth

Where could delivery be improved (reflecting UK’s nations, regions and communities)?

In particular, some of the audience felt Radio 3 could consider ways of increasing regional or national portrayal and opportunities for increasing shared experiences.

Respondents’ ideas for possible ways to increase national and regional portrayal included ensuring sufficient emphasis was offered to the regional and national elements of concert coverage from different parts of UK. It was also suggested that more could be done to promote and raise the profile of local BBC events (e.g. publicity and emphasis around the Proms in Scotland).

“Maybe they do it, but if it’s a concert from Bournemouth, say so. Make a little more of it.”

21-34/Heavy/London

In addition, it was suggested that clearer reference could be made to the origins of artists (UK wide or global) as well as ensuring presenters and commentators reflect different regions and nations.

“I admit I haven’t been listening out for it, but I don’t think you hear many Welsh accents on 3. I can’t think of any.”

55-75/Heavy/Swansea

It was also suggested that Radio 3 could provide more opportunities for shared experiences (it was meeting expectations: 58 per cent agreed this was provided and 59 per cent rated this as important). Some ways this could be achieved that were offered by the respondents included more UK-wide events allowing shared participation at a number of venues across the country. It was also suggested that this could be achieved by enabling greater levels of interaction and dialogue between audiences, ideally via an online platform.

“I listen to Radio 3, but none of my friends do… it would be good to know who else like me enjoys Radio 3.”

21-34/Heavy/London
5. RADIO 4

Station Overview

Radio 4 is a mixed speech service, offering in depth news and current affairs. It also offers a wide range of other speech output including drama, readings, comedy, factual and magazine programmes. The service should appeal to listeners seeking intelligent programmes in many genres which inform, educate and entertain. Radio 4 broadcasts throughout the UK on FM, long wave and medium wave radio, DAB digital radio and other digital media.

5.1 Associations

Spontaneously, Radio 4 evoked a wide range of positive associations. The key language and words that were used by the audiences in the qualitative discussions when describing Radio 4 were informative, engaging, quality, consistent, intelligent, in-depth, cultural, inspiring, considered, traditional, reliable, grown up, serious, English, and humorous.

A key audience perception was that Radio 4 was informative. For most, Radio 4 was a key source of information on news, current affairs, factual content, educational content and creative or cultural content. It was often seen as the key radio source in all these areas.

“I listen to it for the news and what’s happening. For me, that’s why it’s there.”

55-75/Heavy/Belfast

Programming was also widely described as engaging. It was regularly perceived by listeners to have the capacity to draw people in and to hold their interest – whether this was current affairs or a cultural item (often attributed to the professionalism and style of the presenters and production).

“It’s just good at hooking you. Things like history or cultural bits, they can be really well done, and you just want to keep listening.”

21-34/Light/Swansea

Quality was a key word used to describe Radio 4 throughout the qualitative research (see section 5.2 for definitions); audiences frequently stated that they felt Radio 4 was the standard bearer for ‘quality’ speech-based radio. The professionalism, quality and style of programming were seen as consistent across the schedule, and were regarded as a benchmark for speech-based programming.

A minor criticism from some respondents was the predictability of the schedule and the perceived lack of originality. Across all age groups, there was a feeling that Radio 4 was unwilling to take risks by trying more original approaches to scheduling or offering ‘unexpected’ programming. In this regard some felt it prioritised retaining a loyal audience rather than seeking a newer audience. However, the majority of the audiences appreciated that key programmes had established
timeslots over many years, allowing regular patterns of listening for particular programmes and engendering a loyal following (e.g. *The Archers*, *Gardener’s World*, *Just a Minute*, etc.).

“*Radio 4 has its listeners and doesn’t seem that bothered about finding new ones.*”

35-54/Light/Belfast

“The schedule never really surprises, you get a predictable format every day….but that’s why I like it.”

35-54/Heavy/Leeds

There was also some belief amongst listeners that Radio 4 did not appear to prioritise cultural diversity. Ultimately, Radio 4 was perceived tonally as fairly middle class, and audiences felt this was demonstrated by a lack of notable diversity in the presenters’ accents or cultural backgrounds. This view was more frequently expressed by a few ethnic minority audience members and audiences based in areas furthest away from South East England i.e. in the nations; Scotland, Wales and Northern Ireland.

“It’s a bit posh, and doesn’t feel like there’s a whole range of accents on there.”

55-75/Heavy/Fort William

“It presents a diverse range of topics….but in a white, middle class, British way.”

21-34/Heavy/Leeds

5.2 Quality

In the quantitative survey, two out of three listeners gave Radio 4 a score of eight or more out of ten for quality and not one listener rated the station as poor quality. The scores were:

- 64 per cent rated the quality as good,
- 30 per cent did not feel strongly either way and
- 0 per cent rated the quality as poor.

Source: Pre-task quantitative survey; Question: How would you rate BBC Radio 4 in terms of overall quality on a scale of 1 to 10? Where 1 = extremely poor quality and 10= extremely good quality?; Base: c. n=136

“Everything about Radio 4 says quality.”

35-54/Light/Edinburgh

Many elements of Radio 4 were seen by its audience as enhancing overall ‘quality’. Within the qualitative research presenters and programming were a primary focus. Presenters were seen as knowledgeable, passionate, intelligent and (mostly) accessible in their delivery or anchoring of programmes.
“I think they’ve got decent presenters, who aren’t afraid to ask difficult questions. They ask the things you would.”

21-34/Light/Belfast

Programming was seen as offering a good variety of topic area and depth to the information covered/provided in programmes, keeping audiences engaged.

“It’s not just skimming the surface, it’s examining an issue properly.”

35-54/Heavy/London

Production was also seen as setting high standards, frequently positioned as ‘the benchmark’ for speech-based radio production (seamless reports, links, sound quality, etc).

“I think Radio 4 is how radio should be. It’s all done so professionally.”

35-54/Light/Edinburgh

“It’s put together well, it’s a high standard, it’s interesting and it’s well presented.”

55-75/Heavy/Saddleworth

The tone was also seen as contributing to the overall quality of the output, being variously described as serious, intelligent and challenging.

“I find it quite relaxing, it has a calm and reassuring tone of voice.”

35-54/Heavy/London

5.3 Value for money

The quantitative research showed Radio 4 was seen as offering very good value for money (60 per cent rating it as very good value for money). The scores were:

- 60% felt Radio 4’s represented very good value for money,
- 35% felt it was fairly good,
- 2% felt it was fairly poor or very poor.

Source: Pre-task quantitative survey; Question: The licence fee, which pays for all BBC services, costs £145.50 per year and must be paid by every household with a colour television. Of the £145.50 a total of £4.66 goes towards BBC Radio 4. To what extent do you feel that BBC Radio 4 represents value for money, for you and your household? Base: c. n=136

The qualitative research also backed this up with audiences being extremely positive about Radio 4’s overall value for money. Despite having the highest cost (from the licence fee) of the stations in this review, only 2 per cent of the sample found the station offered poor value and this is the most positive score of the three radio stations tested.
“It’s excellent value when you think of all the things it does well and that no-one else does.”

21-34/Light/Swansea

“I can’t really fault it. It has fantastic variety. There’s something for everyone. I think that’s what good value is.”

55-75/Heavy/Saddleworth

The small number who felt Radio 4 offered poor value for money tended to be in the devolved nations (Scotland, Northern Ireland and Wales), male, lighter listeners and younger (21 – 34 year olds). Usually, the reasons for these listeners doubting its value for money were the lack of variety of programming and limited numbers and types of programme they enjoyed.

“I do wish there was a bit more for me. It’s good, what it does, but I think it’s more keen on pleasing my mum than it is on pleasing me.”

21-34/Light/Swansea

5.4 Contribution to purposes: overview

In terms of how Radio 4 performed against the purposes, overall, there was considerable consistency between the audience’s opinion in the qualitative research and their preferences in the quantitative survey.

![Chart 8: Overall performance ranking for Radio 4](image)

Radio 4 was positioned as delivering strongly in the areas that mattered to listeners across a range of purposes with quality of news coverage driving these audience perceptions. There were some areas where the distinction between purposes was blurred for audiences; most notably there was some perceived overlap between the global purpose and world news coverage, which was seen as hard to distinguish from more general news and current affairs covered by the citizenship purpose. Nonetheless, both purposes performed strongly in terms of overall delivery.
Chart 8 above demonstrates that audiences believe Radio 4’s delivery is weakest against the nations and regions and communities purpose and the digital purpose. However, as section 5.5 highlights, these two purposes were deemed by listeners to be the least important for Radio 4, and as such the gap between expectations of delivery and perceptions of performance in these areas were not considered priorities.

5.5 Radio 4’s contribution to each purpose

5.5.1 Citizenship purpose
Chart 9 highlights the overall rating of importance (in red) and performance (in blue) for delivery against each of the questions under the citizenship purpose. Radio 4 is meeting listener expectations. The high performance score meets and slightly exceeds the very high level of importance placed on these priorities by its audience.

Chart 9: Performance vs. importance rating for Radio 4 on sustaining citizenship

<table>
<thead>
<tr>
<th>Question</th>
<th>Importance</th>
<th>Performance</th>
<th>Performance gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 4 provides high quality independent news and current affairs</td>
<td>87</td>
<td>89</td>
<td>2</td>
</tr>
<tr>
<td>BBC Radio 4 makes news and current affairs and other topical issues</td>
<td>86</td>
<td>89</td>
<td>3</td>
</tr>
<tr>
<td>to me</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BBC Radio 4 helps me understand UK-wide politics</td>
<td>78</td>
<td>80</td>
<td>2</td>
</tr>
<tr>
<td>BBC Radio 4 helps me understand politics in my nation (England/Wales/Northern Ireland/Scotland)</td>
<td>74</td>
<td>75</td>
<td>1</td>
</tr>
<tr>
<td>BBC Radio 4 coverage of news and current affairs has got me talking about them</td>
<td>71</td>
<td>76</td>
<td>5</td>
</tr>
<tr>
<td>BBC Radio 4 offers high quality intelligent speech programming</td>
<td>69</td>
<td>77</td>
<td>8</td>
</tr>
<tr>
<td>BBC Radio 4 helps me understand politics in Europe</td>
<td>64</td>
<td>64</td>
<td>0</td>
</tr>
<tr>
<td>BBC Radio 4 helps me understand politics in the other nations of the UK</td>
<td>60</td>
<td>66</td>
<td>6</td>
</tr>
</tbody>
</table>

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that….. Gap = Performance – Importance (negative = under delivery). Base: c. n=136

Particularly notable is the perceived importance that audiences attached to Radio 4’s provision of high quality independent news and current affairs programming. Nine out of ten listeners agreed that Radio 4 provided high quality independent news and current affairs. Overall, the depth and breadth of news and current affairs coverage differentiated Radio 4 from other speech based radio and was seen as crucial in providing high value for listeners.
A key driver of audience perceptions was the depth of coverage; listeners saw the level of detail and explanation offered in both news and current affairs programming as a benchmark for speech-based radio. This was highlighted by the range of programming covering these areas including Today, Yesterday in Parliament, PM, World at One, the Six O’clock News, Any Questions, and Week in Westminster.

“It goes into huge depth on stories that other radio stations would just skip over.”

35-54/Light/Belfast

The knowledge of presenters, commentators and guests was also commended, and described by many as passionate, intelligent and engaging on a wide range of topic areas. Radio 4 was also seen as offering a different perspective on an issue or topic compared to other radio stations. Its coverage was positioned by listeners as thought-provoking and challenging the listener’s own position (or even prejudices). In addition, the station was seen as creating talking points, with the news coverage also driving debate and discussion both between experts on show, and for listeners in their spare time.

“There’s always something on Radio 4 to comment on over breakfast.”

35-54/Heavy/London

“It challenges you as a listener to think about issues.”

21-34/Heavy/Leeds

The variety of news stories was also valued, with audiences praising bulletins and news programming for providing a well-rounded coverage of the news.

“It’s the level of detail over a number of stories that makes it stand out. … They know how to report a story in a way that really makes it hit home.”

21-34/Heavy/Leeds

For the majority of respondents, Radio 4’s strong performance in ‘making the news and current affairs and other topical issues interesting to me’, was attributable to The Today Programme (and to a lesser extent the World at One and the Six O’clock News). The Today Programme and its presenters were regularly mentioned throughout the qualitative research, amongst both the core Radio 4 audience and lighter listeners who also frequently tuned in to the breakfast show on Radio 4. In particular, some audience members enjoyed presenters challenging politicians or other public figures to make their points clear and accessible for the listener.

“They’re engaging and clear. They simplify it. If someone from outside isn’t clear on their point, [John H] will ask them to simplify it. Which is great.”

55-75/Heavy/Saddleworth
Radio 4’s programming was also broadly seen as helping people make sense of political issues in the UK, and again the Today Programme was widely commended by core listeners for its accessibility and courage in challenging politicians.

“He makes politics understandable, in an entertaining way too. John [Humphreys] likes to have a go at [politicians], try to catch them off guard.”

55-75/Light Radio 3/Bristol

Where could delivery be improved (sustaining citizenship)?

There were particularly high expectations of Radio 4 with regards provision of quality independent news and current affairs and helping understand politics in my nation.

Overall, there was strong delivery against the citizenship purpose with no negative performance gaps, although the qualitative research did highlight listeners’ feelings that the station had the potential to increase its engagement with its younger audiences. BBC Radio 4 was not seen as delivering as well for its younger listeners (aged 21-34) with regards the priorities ‘making news and current affairs interesting to me’ and ‘helping me understand politics’.

Reasons for this offered by listeners included content could be a bit inaccessible at times (e.g. discussing politics in other UK nations), although intelligence/depth was seen as a strength of the service output.

“I have to say, stuff like politics in Scotland or something I just mentally switch off. So it’s not all brilliant.”

21-34/Light/Swansea

The perception of the lack of interaction with listeners (e.g. via text, email or via debate and discussion phone-ins) was sometimes at odds with how younger listeners enjoyed listening to radio, although the discussion focus on ‘expert’ views (as opposed to the opinion of the general public) was largely seen as a strength of the programming for the core audiences. Older audiences were more likely to agree that Radio 4’s coverage of news and current affairs generates topics of conversation.

“It can feel a bit like they’ve got their audience and they’re not bothered about younger listeners.”

21-34/Heavy/Leeds

Overall, however, Radio 4 was performing well for the majority of the audiences on this purpose and the suggestions for improvement were positioned as possible considerations rather than key issues to address.
5.5.2 Education purpose

Overall, Radio 4 was seen as delivering strongly with regards to the education purpose.

Chart 10 indicates that the audience clearly felt Radio 4 did well on aiding personal learning, with 85 per cent claiming to have learned new things while enjoying content on the station (and 86 per cent rating this as important for delivery).

**Chart 10: Performance vs. importance rating for Radio 4 on promoting education and learning**

<table>
<thead>
<tr>
<th>Performance</th>
<th>Importance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>85</td>
<td>86</td>
<td>-1</td>
</tr>
</tbody>
</table>

I have learned new things while enjoying programmes or content on BBC Radio 4

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that….. Gap = Performance – Importance (negative = under delivery). Base: c. n=136

“If you’re talking about informative, then yes, you pick up things that you didn’t know before.!”

35-54/Light/Bristol

“I take things away from Radio 4, I actually learn things…that’s different to all the other stations.”

35-54/Heavy/Leeds

The qualitative research highlighted that personal learning took place across wide range of programmes. In some cases, the audiences felt Radio 4 had prompted initial awareness of particular subjects. For instance, there were references to issues as far ranging as Bollywood musicals to the behaviour of vultures:

“Thinking about it, I did get into Bollywood musicals through an article on Women’s Hour, I think. I’m sure it was that.”

55-75/Light/Saddleworth

“It’s opened my eyes to so many issues that I would never have known about.”

35-54/Heavy/Leeds
“There was a programme earlier this week on the sinking of the SS Lancaster, which I’d never heard of. Happened in 1940, apparently 6000 people died and it’s never talked about. There are a number of things like that, where it’s really opened my eyes to stuff I didn’t know about”

55-75/Heavy/Saddleworth

“They had a programme about breast cancer the other day and I learned a lot of things I didn’t know.”

35-54/Heavy Radio 3/Helston

“There was something about how vultures are being poisoned, I think it was, by water in India the other day. I learned something there.”

35-54/Heavy/Bristol

Key programmes highlighted by listeners for their delivery on personal learning included:

- *The Today Programme* – highly praised for offering up-to-the-minute learning on news, current affairs, politics, business.

- *In Our Time* – seen by some listeners as providing a thoughtful introduction to discussion on subjects from culture, history, philosophy, science and religion.
  
  “Melvyn Bragg’s programme’s good for learning things. I find him a bit dry at times, but you pick things up. I remember one about Neanderthals recently and some bones they found in Germany. Really interesting.”

  55-75/Heavy/Fort William

- *Gardener’s Question Time / Farming Today* – helping its regular, often loyal listeners to learn new information for hobbies and interests as well as local business interests (e.g. Farming).
  
  “When I listen to things like Gardener’s Question Time, I think ‘oooh, I’ve got that in my garden, I didn’t know what that was’, you know.”

  35-54/Light/Bristol

- *Woman’s Hour* – seemingly popular with both male and female listeners, and a key reference point for learning about culture or history.
  
  “Woman’s Hour is fantastic, the things that you get out of that.”

  35-54/Heavy/Leeds
• **A History of the World in 100 Objects** – a frequently referenced programme offering historical insight into ancient art, industry, technology and arms, from the British Museum's collections.

  “There was one about a pot they found in Peru. A warrior, and the way is made told us about the way they lived and their lives. It was really interesting, it always is.”

  35-54/Heavy/London

• **The Food Programme** – cited as helping listeners to learn about different types of food from a pleasure perspective but also the economics and business side of food.

  “They do things like how food businesses run, as well as some interesting ideas about how to use different ingredients to make nice meals. It’s definitely educational. I’ve learned a lot about things like the healthiness of different foods or what it goes with when you’re cooking. All sorts.”

  35-54/Light/Edinburgh

**Where could delivery be improved (promoting education and learning)?**

A minority across the sample felt there may be opportunities to increase brand engagement with younger audiences through specific educational programming. Ideas put forward by the audience in the qualitative research included Radio 4 online offering more overt educational support including ‘guides to’ and archive programming useful for school children (e.g. school texts for English Literature that have been afternoon plays, etc.). It was also suggested that there could be more content for parents to share with children, positioned as a modern version of ‘Listen with Mother’.

  “I think it could do more on helping children’s learning. They do science really well when it’s on there but it’s not likely children will hear it. I don’t think there’s enough to direct them to more information at the moment.”

  35-54/Heavy/Bristol

**5.5.3 Global purpose**

Chart 11 indicates that Radio 4 was seen as delivering strongly on the global purpose, although this was driven more by its strong global news coverage than by wider cultural content. 90 per cent agreed that Radio 4 helped them understand what was going on in the wider world, such as international news and events. 80 per cent agreed that Radio 4 helped them understand and appreciate different cultures and lifestyles. In both instances, Radio 4’s performance exceeded expectations.
From the qualitative research, the key driver for these positive perceptions of Radio 4’s performance in this purpose was its associations with ‘high quality’ international news coverage – often cited by listeners as being part of their daily news schedule. This was reflected in the high levels of audience praise reserved for Radio 4’s international news and current affairs coverage. In particular, it was seen by listeners as covering multiple and complex issues in a way that resonated with its audience (e.g. *The Today Programme*, and *The World Tonight*).

By using a global network of correspondents, it was seen as providing multiple and different perspectives on issues and thus offering a more balanced and thorough investigation of an issue. This also helped the station to provide a deeper understanding of stories beyond the headline news reports (e.g. perspectives offered by programmes such as *From Our Own Correspondent*)

“They have these programmes that do go into huge detail on news issues abroad. The one with Kate Adie [From Our Own Correspondent] does that. It’s very thorough.”

35-54/Heavy/Bristol

“I think it tries to provide a balanced view on issues in Europe. Being German, I feel I provide a more neutral view on this, and Radio 4 does this very well.”

55-75/Heavy/N London

More broadly, there was evidence of non-news programming contributing to the delivery of the global purpose. In particular, programmes on travel and cultural discovery helped audiences to learn about different cultures across the schedule (e.g. *Excess Baggage*, *Woman’s Hour*, *The World Tonight*, *A History of the World in 100 Objects*, even *Desert Island Discs* were all seen to offer insight into world culture and lifestyles).

“I was listening to something where they were talking about deaths of vultures in India. It was through a chemical a lot of us take for arthritis and it was killing vultures. So it definitely goes International!”

55-75/Heavy/Saddleworth
“On Woman’s Hour they’ll have things like an Asian girl talking about her marriage. It does make you think about how people live in other parts of the world.”

35-54/Light/Bristol

In addition, ‘bringing the UK to the world’ strongly linked Radio 4 with the World Service, both in terms of its values and in the schedule (World Service shares its coverage from 1am to 5am on Radio 4). There was considerable crossover in perceptions of the two stations, particularly amongst those who listened to Radio 4 on a long wave frequency.

“I listen to Radio 4 long wave a lot, especially in the summer when the cricket’s on. I’m sure it’s got a lot of the World Service programming too. They sort of cross-over a bit.”

55-75/Heavy/N London

Where could delivery be improved (bringing the UK to the world and the world to the UK)?

Many of the audience expected Radio 4 to be the standard bearer for helping listeners understand what was going on in the wider world. In this respect it lived up to expectations in terms of delivery.

Radio 4 also significantly over-delivered in terms of contribution to understanding and appreciating different cultures and lifestyles from around the world, generating a performance gap of +12 (i.e. performing above expectations).

The overall strong delivery on the global purpose led to no negative gaps, although comments from the qualitative research indicated the station should ensure it was representing the world beyond the news. In particular there was some occasional listener criticism that global coverage beyond major news stories was too focused on the US and Europe.

“It can be bit pre-occupied with the USA and Euro-land.”

35-54/Heavy/London

“It’s not interested in telling people much about Israel. Not in any detail.”

55-75/Heavy/N.London

“I think it’s predominantly English based, well UK I suppose. It’s about here though and less about the European community. It says far less about that than what happened in the Houses of Commons yesterday.”

55-75/Heavy/Saddleworth
5.5.4 Creativity purpose

Overall, Chart 12 highlights that Radio 4 was perceived as delivering well on the creativity purpose, but evidence was focused more on programme variety and content being cultural rather than the creativity of the station itself. The qualitative research highlighted that there were mixed views about the level of creativity evident on Radio 4.

Concurrent with this, it was seen as under-performing on provision of fresh and new ideas and helping people with introducing them to new interests, hobbies and passions.

**Chart 12: Performance vs. importance rating for Radio 4 on stimulating creativity and cultural excellence**

<table>
<thead>
<tr>
<th>Description</th>
<th>Performance</th>
<th>Importance</th>
<th>Performance Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 4 has a wide range of enjoyable and entertaining programmes</td>
<td>88</td>
<td>90</td>
<td>2</td>
</tr>
<tr>
<td>and content eg. comedy, drama, stories, features, readings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BBC Radio 4 has programmes and content that are inventive and imaginative</td>
<td>84</td>
<td>86</td>
<td>-2</td>
</tr>
<tr>
<td>BBC Radio 4 has lots of fresh and new ideas</td>
<td>70</td>
<td>80</td>
<td>-10</td>
</tr>
<tr>
<td>BBC Radio 4 introduces me to new presenters, actors, and writers from the UK</td>
<td>77</td>
<td>83</td>
<td>6</td>
</tr>
<tr>
<td>BBC Radio 4 provides programmes and content which cover a wide range of</td>
<td>76</td>
<td>82</td>
<td>6</td>
</tr>
<tr>
<td>cultural and creative activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BBC Radio 4 helps me enjoy my interests, hobbies and passions</td>
<td>56</td>
<td>68</td>
<td>-12</td>
</tr>
<tr>
<td>BBC Radio 4 introduces me to new interests, hobbies and passions</td>
<td>56</td>
<td>68</td>
<td>-12</td>
</tr>
<tr>
<td>Programmes or content on BBC Radio 4 sometimes make me want to take part in</td>
<td>49</td>
<td>50</td>
<td>1</td>
</tr>
<tr>
<td>a specific event or activity</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that……. Gap = Performance – Importance (negative = under delivery). Base: c. n=136

Overall, 90 per cent of respondents felt Radio 4 provided a broad mix of enjoyable and entertaining programmes and 84 per cent felt that these programmes were inventive and imaginative. Key drivers of these perceptions were identified in the qualitative research and included the variety of creative content across the arts, drama and comedy offered by the Radio 4 schedule.

“On the arts itself, Radio 4 is the one…only Radio 3 or Classic FM come close, but they’re just on the musical side.”

35-54/Light/Belfast
Listeners offered a wide range of programme examples which they felt were stimulating and encouraged participation in creativity, the arts and culture, including:

- **Front Row** – fairly widely mentioned by listeners, citing its mix of interviews, reviews, previews, discussions and reviews on arts, literature and culture as evidence.
  
  “There’s a lot of discussion of plays, books and films.”
  
  21-34/Light/Fort William

- **The Archers/Book at Bedtime/The Afternoon Play** – all popular titles seen as evidence of creative output amongst all age groups, although often seen as a bit ‘hit and miss’ in terms of interest/engagement.
  
  “I wouldn’t often get a chance to go to see a play, but I can listen to one on the radio.”
  
  55-75/Heavy/Belfast

  “I love the Book at Bedtime, although sometimes it’s tough waiting a whole day for the next instalment!”
  
  35-54/Heavy/London

  “I always listen to The Archers, and if I miss one, it’s a must to listen to the Sunday morning omnibus.”
  
  35-54/Radio 3 Heavy/Saddleworth

- **I’m Sorry I Haven’t a Clue** – often cited, long-running satirical quiz show was popular with many of the core audience, widely seen as clever, humorous and creative.
  
  “I think that’s fabulous. It’s just great fun, and in my view it’s much better than the new comedy they sometimes put on.”
  
  35-54/Heavy/London

- **Comedy Programming** – although somewhat hit and miss in terms of popularity, frequently offered by listeners as evidence of entertainment and creative output, and often acknowledged as the starting point for new, popular titles that have made their way onto TV, including *Mock the Week*, the *Day Today* and *Little Britain*.
  
  “Radio 4 is the starting point for successful comedies on TV like Little Britain.”
  
  21-34/Light/Swansea

- **In Our Time** – Melvyn Bragg’s show was occasionally mentioned as a source of arts and cultural knowledge, including the audience mentioning subjects ranging from the Italian Renaissance painters through to Edvard Munch’s painting *The Scream*.
“I’m sure I heard one about the lives of Italian artists, Renaissance artists the other week.”

55-75/Heavy/N.London

- A History of the World in 100 Objects – also cited by a few as having a contribution to understanding of the history of arts and culture.

“It talks about all sorts, from statues, to cave paintings to textiles. It’s all about understanding culture and history.”

35-54/Heavy/Leeds

Even on the lowest scoring statement, around half the respondents felt that Radio 4 had made them, at some point, want to take part in an event or activity, ranging from dancing to cooking.

“I suppose you could argue that Gardener’s Question Time makes me want to go out in my garden. In that way it makes me want to take part in an activity.”

35-54/Heavy/Bristol

However, a criticism raised by some of Radio 4’s younger audience was that they felt the station and its schedule lacked creativity and dynamism. It was positioned as unwilling to take risks or try to do something different in the scheduling. As a result, for a few it was seen as somewhat predictable and staid.

“I can’t remember the last time a Chris Morris emerged from Radio 4 comedy. Maybe I’m wrong, but it feels like a long time.”

21-34/Radio 3 Light/Fort William

“The schedule never really surprises, you get a predictable format every day… but that’s why I like it.”

35-54/Heavy/Leeds

“I think it covers a wide range of cultural activities, but I don’t know about creative.”

35-54/Light/Bristol

Where could delivery be improved (stimulating creativity and cultural excellence)?

Overall, Radio 4 delivered well on most areas of the creativity purpose (i.e. programme choice and creativity), but there was seen to be potential to innovate more.

The perceived lack of fresh and new ideas was Radio 4’s only negative performance gap that was borne out in both the quantitative and qualitative findings.
“I do just switch off the afternoon play when it’s a bit over the top or just a bit boring. It’s not always great.”

55-75/Heavy/N.London

Therefore a few felt Radio 4 could consider introducing or promoting more creative programme formats within its schedule. In particular, some younger, lighter listeners wanted Radio 4 to explore new programmes or formats targeting ‘younger’ audiences, potentially involving taking more risks.

“I’d say Radio 6 is innovative, I wouldn’t say Radio 4 is…”

35-54/Heavy/London

“It’s a bit safe isn’t it? Radio 4’s got a sound, a feel to it. It’s a bit predictable.”

21-34/Light/Swansea

However, the performance gap was not one of the largest across the six purposes, and it is important to recognise that core audiences valued the consistency of Radio 4.

In the quantitative work there was also a negative performance gap around Radio 4 introducing and helping enjoyment of interests and hobbies, but this was not supported by the qualitative discussions. It is possible that the wording of statements may have been a factor in this response, with ‘hobbies’ in particular picked up on as easily misconstrued in the quantitative research.

“When I think of hobbies, I think of pastimes I indulge myself in, like doing pottery. That’s a hobby. But I’m interested in the arts generally and Radio 4 does help my interest in the arts. It’s just not helped me make better pots.”

55-75/Heavy/Fort William

5.5.5 Digital purpose

Overall, the digital purpose was a low priority for the majority of Radio 4’s audiences with most expressing limited expectations in this area. Only a few were using online or Red Button content with any frequency (if at all) to enhance their enjoyment of the station. This often reflected the fact that traditional methods of access sat more naturally with the habitual ways in which the vast majority of listeners engaged with Radio 4.

“I wouldn’t think of switching on the computer to listen to the radio. Even less so, the TV. That’s just not right, to me.”

55-75/Heavy/Fort William

“I want to listen to the radio in the kitchen and the garage, so it’s the old trusty portable that I use.”

35-54/Heavy/London
However, Chart 13 shows that 60 per cent felt that Radio 4 provides quality content online ‘that I find enjoyable/useful’. Delivery was largely in line with audience expectations.

Chart 13: Performance vs. importance rating for Radio 4 on emerging communications

<table>
<thead>
<tr>
<th>BBC Radio 4 provides quality content that I find enjoyable or useful on the internet e.g., <a href="http://www.bbc.co.uk/radio4">www.bbc.co.uk/radio4</a>, iPlayer</th>
<th>Performance</th>
<th>Importance</th>
<th>Performance Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>56</td>
<td>60</td>
<td>4</td>
</tr>
<tr>
<td>BBC Radio 4 has helped me make the most of new technologies such as the internet</td>
<td>40</td>
<td>48</td>
<td>-8</td>
</tr>
</tbody>
</table>

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that……. Gap = Performance – Importance (negative = under delivery). Base: c. n=136

Qualitative findings supported this with the majority stating that they felt Radio 4 was delivering sufficiently on this purpose, despite it being less valued overall. Evidence of delivery offered by the audience included some using iPlayer and Radio 4’s website to access and listen to Radio 4 content (with a few accessing podcasts e.g. A History of the World in 100 Objects)

“I have downloaded a few podcasts, when I’ve missed something. But it’s not a regular thing, only if I have to keep up with a series.”

35-54/Light/Belfast

There was also fairly high awareness and expectation of Radio 4 content being available on the iPlayer.

“You assume it’s all there if you wanted it, I just don’t listen to the Radio like that.”

35-54/Heavy/Leeds

For the majority of core listeners, Radio 4 compared positively with Radio 1 or 5 Live by having only low-key promotion of technology to interact with audiences.

“With them (Radio 1/5 Live) it’s constant…Radio 4 has got a bit more interactive recently, but I wouldn’t want it to go much further.”

55-75/Heavy/Belfast

Overall, there was a growing awareness of and (often tentative) usage of the iPlayer amongst more traditional Radio 4 audiences, and this was driving positive perceptions of Radio 4’s contribution to the digital purpose. Some had been shown the technology by other family members or friends, but once they had used it there were indications that they could see it was straightforward to use and that it could revolutionise their listening (in terms of offering more flexibility of when they listened).
Some reasons were offered as to why content had been accessed via iPlayer directly or via the Radio 4 website. Primarily, this was to hear key programmes that listeners had missed live. Examples of these programmes included specific episodes of *Woman’s Hour* and *The Material World* which listeners had caught on the iPlayer. In addition, a few listeners to *The Archers* were pleased to have found a way of not having to wait for the Sunday omnibus when they had missed an episode. This was a revelation in a few of the audience sessions.

“I discovered that I could catch-up on *The Archers* on the iPlayer if I missed it.”

35-54/Light/Belfast

A few listeners also mentioned catching up on the station’s comedy at weekends. Listeners used this period to catch up on missed episodes, with a few also downloading podcasts of comedy shows as part of their listening behaviour.

“For me, it is quite important, I listen to Radio 4 comedy on the iPlayer on a Saturday morning…without it I’d miss out on that opportunity.”

35-54/Heavy/London

**Where could delivery be improved (emerging communications)?**

There was a small negative performance gap around ‘Radio 4 has helped me make the most of new technologies such as the internet’. Performance was not seen as quite living up to audience expectations of Radio 4’s delivery.

Although not identified as a key ‘need’ by audiences, there were barriers identified to online radio usage. A key barrier was not understanding what was available; despite a growing awareness of what was available online, knowledge about what could be accessed and how was still patchy.

There was also a lack of confidence in using the technologies. Streaming and downloading was seen as much more intuitive than in the past but continuing to make this as approachable and accessible as possible was seen as key to increasing this option for some of the less technology savvy listeners.

Therefore some of the listeners felt there was potentially an opportunity for Radio 4 to help them (particularly older and less technology savvy) increase online usage and confidence. Audiences suggested that this might be achieved through promoting the ease and benefits of engaging with Radio 4 content online.

“Because I trust Radio 4…I think they could support you a bit more, help you make the most of it (online content).”

55-75/Heavy/Belfast

However, listeners were quick to suggest it will be important not to place too much emphasis on new technologies versus traditional methods of access, because the majority of listeners enjoyed how they accessed the programmes at the moment.
“I know we’ll all have to move over to digital in the end, but I don’t want to be bullied into listening to radio through my computer. I’m in no rush for that.”

55-75/Heavy/N London

5.5.6 Nations, regions and communities purpose
Overall, there was scope for Radio 4 to improve on its delivery on the nations, regions and communities purpose, with the largest performance gaps most evident in the nations (Scotland, Wales and Northern Ireland).

Chart 14: Performance vs. importance rating for Radio 4 on reflecting the UK’s nations, regions and communities

<table>
<thead>
<tr>
<th>Statement</th>
<th>Performance</th>
<th>Importance</th>
<th>Performance Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 4 provides me with the opportunity to share the same experiences with other people (like major events, live events and popular programmes)</td>
<td>51</td>
<td>66</td>
<td>-15</td>
</tr>
<tr>
<td>BBC Radio 4 provides programmes and content that caters for my region</td>
<td>43</td>
<td>62</td>
<td>-19</td>
</tr>
<tr>
<td>BBC Radio 4 provides programmes and content that caters for my particular culture or community</td>
<td>51</td>
<td>61</td>
<td>-10</td>
</tr>
<tr>
<td>BBC Radio 4 is good at portraying each nation (Scotland /England /Wales /Northern Ireland) to other people in the UK</td>
<td>56</td>
<td>59</td>
<td>-3</td>
</tr>
<tr>
<td>BBC Radio 4 is good at portraying my particular culture or community to other people in the UK</td>
<td>48</td>
<td>59</td>
<td>-11</td>
</tr>
<tr>
<td>BBC Radio 4 raises my awareness and understanding of different religions and other beliefs</td>
<td>55</td>
<td>57</td>
<td>2</td>
</tr>
<tr>
<td>BBC Radio 4 reflects a range of religious and other beliefs</td>
<td>52</td>
<td>59</td>
<td>7</td>
</tr>
<tr>
<td>BBC Radio 4 helps me feel more involved and interested in my local communities</td>
<td>33</td>
<td>47</td>
<td>-14</td>
</tr>
</tbody>
</table>

Source: Pre-task quantitative survey; How important is it that..... / How much do you agree that…….  Gap = Performance – Importance (negative = under delivery). Base: c. n=136

Chart 14 highlights a few key areas where Radio 4’s performance was seen as under-delivering. In particular, this was ‘portraying and providing content for different regions’, ‘portraying and providing content for different cultures/communities’ and ‘offering the opportunity to share the same experiences with other people (like major events, live events and popular programmes)’.

Radio 4 was seen as under-delivering in portraying and providing ‘content that caters for my region’, and this perception was stronger the further the listeners were from South East England. In this respect, this was more of an issue in Scotland, Wales and Northern Ireland than in England. It was also slightly more of an issue in the English regions the further away they were from London.
This in part reflected the audience not clearly registering regional accents rather than any certainty that regional/national accents were not present in the station’s schedules.

“With the news, there probably are a few more regional accents. Is Humphreys from somewhere else [not South East]? I think he is, but Today still feels very London.”

35-54/Light/Bristol

“It’s a national station, not a local station…you don’t expect them to focus on local areas.”

35-54/Heavy/London

In particular, there were a few concerns about the lack of coverage of particular regions except when this was led by a key news story. For example, the audience in Belfast felt Northern Ireland was portrayed negatively, with any coverage based on sectarian riots (e.g. in Londonderry) or the political situation, and never about the arts or culture, way of life or other key issues/concerns to the region.

“The only time they come to Northern Ireland is to report problems.”

35-54/Light/Belfast

“There’s never anything about business performance, or any key cultural events in Belfast. It’s always about the politics, which is a shame.”

35-54/Light/Belfast

More positively, a few listeners offered the UK road show format used by Gardener’s Question Time as some positive evidence of catering for regions and nations and taking an interest in providing some historical and cultural context for different areas.

Radio 4 was also seen as under delivering in portraying and providing ‘content that caters for my particular culture or community’. The perception of a lack of cultural diversity to the station was an enduring issue. Ethnic minority listeners and those living in the nations positioned presenters and programming as white, middle class and English.

“Even though they do include different cultures it’s still very traditionally English…someone from a different culture wouldn’t listen to it.”

35-54/Heavy/London

“I don’t really expect Radio 4 to dedicate time to covering my community though? I guess nonetheless they don’t.”

55-75/Heavy/N.London
In contrast, there was recognition amongst heavier listeners that Radio 4 had progressed in this area and that the station performs well on raising awareness/representing different religious beliefs. This was reflected in Radio 4’s perceived over-delivery in terms of raising awareness and understanding of and reflecting a range of different religions and other beliefs. Examples of this offered by listeners included *Thought for the Day* with contributors representing a range of religious beliefs. In addition, *The Archers* was seen as having increasingly ethnically diverse characters over the years.

“Over the years Radio 4 has evolved more and become more diverse … they never used to have different religions on *Thought for the Day* or women of different ethnic backgrounds on *Woman’s Hour*, but they do now.”

35-54/Heavy/London

We suspect the level of underperformance noted in the quantitative research stems from a lack of appreciation that a ‘community’ could include an interest community. In the qualitative research, when this was suggested to the audiences, they could see how shows such as *Gardener’s Question Time*, *Farming Today*, *Woman’s Hour* and *Front Row* all catered for interests or ‘parts’ of particular communities (and indeed, offered a shared experience).

“If you define community by interests then it does achieve that. For example, gardening [*Gardeners’ Question Time*]. We all talk about that!”

55-75/Light Radio 3/Bristol

Radio 4 was also seen to be under-performing on offering the opportunity to share the same experiences with other people (like major events, live events and popular programmes), with audiences in the qualitative research calling for road show events and bringing popular programmes to the regions in one off ‘live broadcasts’.

With the exception of *Gardener’s Question Time*, few could recall recent examples of major events which listeners could get involved in and provide opportunities for ‘shared experiences’.

However, in the qualitative research there was more opportunity to probe what was meant by ‘shared experiences’ and there was some audience recognition that popular interest based programmes such as *Gardener’s Question Time* or popular long-running series such as *The Archers* did provide stimulus for discussion amongst friends, thus offering a shared experience as a talking point.
Where could delivery be improved (reflecting the UK’s nations, regions and communities)?

Overall, audiences felt there were areas for Radio 4 to improve performance against the nations, regions and communities purpose. Audiences felt Radio 4 could aim to provide accurate portrayal for different areas and communities across the UK. Ideas to potentially address this purpose gap for Radio 4 that were offered by listeners included more roadshow style programme formats covering the UK and more non-news based features on different parts of the UK (reflecting lifestyle, culture and heritage in a more positive light).

“I don’t know anything about kids growing up in Liverpool or Manchester…it might be worth devoting even half an hour a week to covering that”

35-55/Heavy/London

It was also suggested that Radio 4 could have higher profile presenters and regular contributors reflecting different regions, nations and ethnic groups (with engaging personalities to give the station more ‘known voices’).

It should be noted that performance ratings on this purpose were often perception driven (e.g. that all presenters were white, male and middle class). Audiences believed it was important to promote the diversity within Radio 4 if their perceptions did not actually reflect the reality.
6. RADIO 7

Station Overview

Radio 7 is a speech based entertainment service and its schedule should include comedy, drama, stories, features, readings and programmes for children. Most output should come from the BBC archive, but the station should commission some original content, particularly of types of output rarely found in BBC Radio. Radio 7 is available on DAB digital radio and other digital media.

6.1 Associations

In terms of key words associated with Radio 7, respondents spontaneously claimed it had a distinct identity and was valued as a destination where listeners could escape and enjoy quality content. The key words that were used by the audiences in the qualitative discussions when describing Radio 7 were nostalgia, entertaining, escapism, relaxing, different, humorous, repeats, British, family, easy, informing (for some).

However, it was not seen as challenging, particularly culturally diverse, or especially well known.

Amongst these associations, a key term used by the audience to describe Radio 7 was escapism; a few listeners saw Radio 7 as their personal escape from everyday life, and liked to set aside time to enjoy it undisturbed.

“It’s like slipping into a comfortable pair of slippers.”
55-75/Thatcham

“It’s half an hour of my day that’s just for me.”
55-75/London

Radio 7 was also seen as entertaining and a key reason for listeners to return to the station was its ability to provide entertaining content (comedy and drama) from over four or five different decades.

“It’s important to me that it’s different. The only reason I tune in is because its contents are different from everywhere else.”
21-34/Helston

“7 feels like ‘4-lite’. Not less, just a little easier and more accessible – more about entertainment and a little bit less about fact.”
35-54/N London

“For me, if it was a TV station then I’d say Radio 7 is more like Channel 4, whereas Radio 4 is more BBC2. Less dry.”
35-54/N London

Nostalgia was also a key association for an older audience. Radio 7 provided content to enable them to re-discover old favourites from their past, in both comedy (e.g. Hancock’s Half Hour, *the Goons*) and drama (e.g. *The Clitheroe Kid*).

“It's great to re-find all that. The classics, in one archive. It's basically a fabulous archive.”

55-75/Thatcham

“I like to fill my time with something that’s illuminating rather than just entertaining and Radio 7 seems to fill that gap.”

35-54/N London

6.2 Quality

In the quantitative survey just under half of listeners gave Radio 7 a score of eight or more out of ten for quality and no one rated the service as poor. The scores were:

- 49% rated the overall quality of Radio 7 as good,
- 41% did not feel strongly either way and,
- 0% rated the quality as poor.

Source: Pre-task quantitative survey; Question: How would you rate BBC Radio 7 in terms of overall quality on a scale of 1 to 10? Where 1 = extremely poor quality and 10= extremely good quality?; Base: c. n=44 PLEASE NOTE THAT THIS IS A SMALL BASE SIZE

The consistent standard of content and the value placed on the listening experience were driving quality associations for Radio 7. Quality was in part defined by it offering classic programmes, described as cherry picked ‘standard bearers’ as well as niche content unavailable elsewhere. In terms of the experience it was seen as involving, immersive and engrossing by many of the audience.

“It's showcasing the best of the BBC's radio programmes.”

21-34/Helston

Radio 7’s production was also seen as offering high standard adaptations and well chosen examples of classic programming, emphasising the BBC’s talent for writing and acting.

“It holds you… they always have a good standard of actors doing it.”

35-54/N London

The audience raised a couple of areas where Radio 7 was not considered to be high quality. There was perceived to be a large amount of repeated content, and listeners regularly commented that nearly all programmes were repeated frequently across the schedule, both in the same day and
over longer periods. Although not all respondents had heard the content when it was originally broadcast, there was also a lack of awareness for any of the original content.

### 6.3 Value for money

Radio 7 performed well on value against the cost of the station, although a limited access to the station brought its overall score down a bit. The scores were:

- 50% felt Radio 7 represented very good value for money,
- 40% felt it was fairly good and
- 9% felt it was fairly or very poor.

Source: Pre-task quantitative survey; Question: The licence fee, which pays for all BBC services, costs £145.50 per year and must be paid by every household with a colour television. Of the £145.50 a total of £0.29 goes towards BBC Radio 7. To what extent do you feel that BBC Radio 7 represents value for money, for you and your household? Base: c. n=44

Overall, half the listeners rated the station as very good value for money, although its rating was not as high as Radio 4 and Radio 3. From this small sample, more positive results were found among females, lighter listeners and those living in London (who rated value for money higher than in the English regions, who in turn rated value for money higher than in the devolved nations).

A key factor raised by the audience that detracted from overall value for money was the limited access they felt they had to the station. This was felt more keenly by those without a DAB radio or with more limited access to the internet (including the lack of access during key listening ‘opportunities’ such as car journeys). The lack of promotion and wider awareness of the station was also raised as a criticism.

“It’s hard to say if it’s value for money – I think it is, but I know about it. I guess the question is why do so many people not know about it…”

35-54/N London

In addition, a few found it hard to judge value for money when they believed they had already paid for the content, given that it was mostly archive content (and they wanted clarification that they did not have to pay for it again).

“It’s like a great big vault, that we now have access to, given we pay our licence fee though, it’s only fair we can have access to it.”

21-34/Helston
6.4 Contribution to purposes: overview
In terms of how Radio 7 performed against the purposes, overall, Chart 15 highlights that there was a very different hierarchy compared with Radio 3 and Radio 4, with audiences emphasising the importance of the digital and creativity purposes as key areas of delivery.

In addition, there was some confusion caused by audiences’ understanding of the ‘education’ purpose. When worded to include helping “children/teens with what they learn at school or college”, this reduced the overall performance measure. There was a rise in perceived performance against this purpose without the school/college learning element of the purpose (from 54 per cent to 68 per cent).

Audiences were not asked about delivery against other purposes in the quantitative phase, although we tested the nations, regions and communities purpose in the qualitative research - a few comments emerged about Radio 7 making more of the ‘interest communities’ which were of interest to Radio 7 listeners.
6.5 Radio 7’s contribution to each purpose

6.5.1 Digital purpose
Radio 7 was seen as delivering against the digital purpose, through a combination of what it offers and how programming was accessed (i.e. via new media such as the Internet or DAB radio).

Chart 16: Performance vs. importance rating for Radio 7 on emerging communications

<table>
<thead>
<tr>
<th>Performance</th>
<th>Importance</th>
<th>Performance Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 7 provides quality content that I find enjoyable or useful on the internet e.g. <a href="http://www.bbc.co.uk/radio7">www.bbc.co.uk/radio7</a>, iPlayer</td>
<td>79</td>
<td>79</td>
</tr>
<tr>
<td>BBC Radio 7 has helped me make the most of new technologies such as the internet</td>
<td>58</td>
<td>63</td>
</tr>
</tbody>
</table>

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that…… Gap = Performance – Importance (negative = under delivery). Base: c. n=44

Chart 16 illustrates that 79 per cent of the audience felt Radio 7 ‘provides quality content’ online (which exactly matched perceived importance of Radio 7 in this area). 58 per cent also felt that Radio 7 had helped them ‘make the most of new technologies’, slightly lower than the 63 per cent who felt that this was important for the station to deliver (though the low base size needs to be acknowledged).

“I listen to it on the net most of the time, because I spend a lot of time on the computer.”

35-54/N London

As a digital-only station, the audience were more attuned to accessing the service online, although many also had a DAB radio. The qualitative research highlighted that Radio 7 listening was far more focused online than for Radio 3 or 4, particularly in areas where there was poor DAB signal available, e.g. Cornwall. Listeners were very positive about their ability to access a wide range of content via the Radio 7 website and the sense of control they had over what and when they listened to content.

“Once you start listening on your computer, you realise how much choice there is…it’s fantastic.”

55-75/Thatcham

Online listening had a transformative effect on overall online usage, increasing their confidence and encouraging them to use the Internet more widely. This was particularly the case for older audiences. For Radio 7 audiences, the online option had acted to improve their overall radio experience, offering increased choice and flexibility in listening times.
“I do love the fact that … you don’t need to be listening at a particular time. It’s just when I want, which is very liberating.”
55-75/Thatcham

A few listeners acknowledged that Radio 7 could act as a gateway station into using BBC online services – with Radio 7 listeners also being those most likely to have looked at other BBC station’s online services. A few Radio 7 listeners were downloading podcasts and using listen again options from Radio 3 and Radio 4.

Some parents with younger children also felt that another way in which Radio 7 was performing well was in the provision of an online complement to content that children had viewed on television (e.g. Dr Who). This in turn was seen as encouraging and enabling children (and the parents) to continue their interaction across other platforms.

It was also seen as helpful by some parents in providing downloadable content (to upload onto MP3 players) to play to children for car and train journeys or even around the house.

“It’s great for playing for your kids and for keeping them quiet, I can replay them stories when they are having their tea.”
21-34/Helston

Where could delivery be improved (emerging communications)?

Audiences highlighted the need to promote Radio 7 more effectively to support the BBC’s emerging communications remit.

It was widely felt that Radio 7 had a key role to play in encouraging listeners further in terms of making use of new technologies. It was suggested that Radio 7 could do more in terms of delivering on this purpose: three out of ten felt that performance was lower than their expectations.

“I only found it by chance, they should make more people aware of it.”
55-75/Thatcham

Audiences believed that increasing promotion and levels of awareness of Radio 7’s offering could help to close the gap between importance and performance scores in terms of Radio 7 helping people ‘make the most of new technologies’. For many, demonstrating the ease and the benefits of listening online was key to this uptake.

“I didn’t know anything about it until tonight. Sounds great, right up my street, but I’ve never heard of it.”
55-75/Heavy Radio4/Saddleworth

6.5.2 Creativity purpose

Overall, Radio 7 was seen as performing well against the creativity purpose. Chart 17 highlights that 92 per cent felt that Radio 7 had a ‘wide range of entertaining and enjoyable programmes’ (the most important priority for them); 78 per cent felt programmes were ‘inventive and imaginative’.
Both of these statements were found to deliver on these expectations. Overall it was seen as delivering a repertoire of enjoyable and entertaining content for a variety of ages.

**Chart 17: Performance vs. importance rating for Radio 7 on stimulating creativity and cultural excellence**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Performance</th>
<th>Importance</th>
<th>Performance Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 7 has a wide range of enjoyable and entertaining programmes and content eg. comedy, drama, stories, features, readings</td>
<td>92</td>
<td>92</td>
<td>0</td>
</tr>
<tr>
<td>BBC Radio 7 provides a good balance of existing material and original content</td>
<td>70</td>
<td>83</td>
<td>-13</td>
</tr>
<tr>
<td>BBC Radio 7 has programmes and content that are inventive and imaginative</td>
<td>78</td>
<td>78</td>
<td>0</td>
</tr>
<tr>
<td>BBC Radio 7 offers content that is not widely available on other BBC radio stations</td>
<td>73</td>
<td>83</td>
<td>10</td>
</tr>
<tr>
<td>BBC Radio 7 helps me enjoy my interests, hobbies and passions</td>
<td>63</td>
<td>71</td>
<td>-8</td>
</tr>
<tr>
<td>BBC Radio 7 introduces me to new presenters, actors and writers from the UK</td>
<td>70</td>
<td>73</td>
<td>3</td>
</tr>
<tr>
<td>BBC Radio 7 provides programmes and content which cover a wide range of cultural and creative activities</td>
<td>65</td>
<td>68</td>
<td>-3</td>
</tr>
<tr>
<td>BBC Radio 7 has lots of fresh and new ideas</td>
<td>55</td>
<td>66</td>
<td>-11</td>
</tr>
<tr>
<td>BBC Radio 7 introduces me to new interests, hobbies and passions</td>
<td>49</td>
<td>59</td>
<td>-10</td>
</tr>
<tr>
<td>BBC Radio 7 has a good range of children's programming</td>
<td>30</td>
<td>45</td>
<td>15</td>
</tr>
</tbody>
</table>

Source: Pre-task quantitative survey; How important is it that….. / How much do you agree that….. Gap = Performance – Importance (negative = under delivery). Base: c. n=44

There were very mixed views regarding Radio 7’s delivery on the creativity purpose, based to a certain extent on how the purpose was interpreted. For example, there were mixed views on whether Radio 7 delivered on ‘creativity’ per se. Its focus on older and repeated programmes did not necessarily equate to a lack of creativity, because younger listeners were often experiencing programmes for the first time i.e. they were seen as fresh and new content to them. Likewise, older listeners had typically heard the programmes before, but valued the enjoyment and nostalgia evoked by the content and the novel way it was accessed.

“It’s yesterday’s creativity.”

21-34/Helston

Overall, there was a belief that the station itself was original and different, driven by its packaging of appealing and quality archive content for audiences to access digitally. This was particularly novel and unique to some older audiences who had less experience of accessing and choosing content in this way.
“It offers something that other stations don’t…there’s nothing like it I can think of.”

55-75/London

There was also considerable value attached to the fact that content often could not be accessed elsewhere, particularly classic comedy e.g. Hancock’s Half Hour or The Goon Show. This was highlighted by perceptions that Radio 7 exceeded expectations in performance on this element of the purpose – scoring 83 per cent agreement that if provided content not available elsewhere.

“They’ve got a lot of drama and comedy you wouldn’t get elsewhere – like Bram Stoker’s Dracula or oldies like Hancock’s Half Hour. I love all that.”

35-54/North London

“It’s great to hear Sherlock Holmes, if there wasn’t 7, it would be lost forever.”

21-34/Helston

The station was also praised by a minority of parents for encouraging imagination and creativity in children (with 45 per cent agreeing that Radio 7 had a good range of children’s programming). It was also seen as offering ‘shared experience’ opportunities for families around spoken voice story telling.

“It has things like Roald Dahl and Sherlock Holmes, which are great for children.”

55-75/Thatcham

Despite the mostly positive news, Radio 7 was perceived to be underperforming on providing ‘a good balance of existing and original’ content and having ‘lots of fresh and new ideas’. This reflected the predominance of older and repeated content and widespread lack of awareness of any original content within the schedule.

“The idea for the station is original, but I’m not sure you could say the programmes are.”

55-75/Thatcham

The service was also seen by Radio 7 listeners as underperforming with regard to introducing new hobbies and interests, but this was not a focus for the station as far as listeners were concerned, with the true value being seen as it offering relaxing escapism and pure entertainment.
Where could delivery be improved (stimulating creativity and cultural excellence)?

Radio 7 was found to be delivering well on audience needs on the creativity purpose, although there was still some potential to increase perceptions of creativity. The main delivery gap was around having new and original content within the schedule.

Whilst not a key focus for audiences in terms of the station’s value, there were some suggestions that there was potential to improve delivery on this remit by introducing and promoting more original content within schedule.

“I would like it to have more talking book content. There aren’t that many books. I’d love it, like an archive of them.”

35-54/N London

There was also some feeling that more could be done to build on associations with Radio 7 as a platform for ‘new’ comedy, which was a particularly interesting potential development for younger audiences.

“They could trial new comedy on Radio 7 before it goes on 4, it’s a good fit for comedy given what it already has on there.”

21-34/Helston

“I think they’re getting a bit tired with the really old comedy. They’re in a bit of a time warp of the 60s and 70s. Where’s classic comedy of the 90s for example?”

21-34/Helston

6.5.3 Education purpose

Overall, although Radio 7 was seen as performing well against the education purpose (with Chart 18 highlighting that over two-thirds felt they had learnt something whilst listening to Radio 7), there were high expectations of the station (84 per cent felt it was important to learn new things listening to Radio 7).

Most had ‘learned new things’ predominantly through historical and literary content, and even topical comedy. However, audiences called for further educational material to facilitate learning. In this respect there was a gap of -16 in performance against its perceived importance.
Examples of programming that listeners claimed had helped them ‘learn new things’ included history and science documentaries (although only a few listeners were able to recall these, and not in any detail).

“It’s bringing older content to a new audience. The science programme they do on inventions. That’s good for learning.”

35-54/ N London

Listeners also felt drama and literature adaptations enabled them to discover and learn ‘new things’ classics such as *Sherlock Holmes* or *Bram Stoker’s Dracula*, or even classic comedy sometimes being ‘discovered’ for the first time.

“I’ve learned about books I haven’t read, or shows like the Goons that I’d never heard before.”

21-34/ Helston

Listeners were much less likely to agree that Radio 7 provided a useful educational resource for their children, with only 39 per cent agreeing that it helped children/teens with what they learn at school or college. However, parents did speak about the positive impact of Radio 7 on their children’s learning, including having CBeebies via Radio 7 in the background in the morning (in preference to younger children watching TV). There was also evidence of listening to adaptations of ‘high quality’ children’s books and provision of content supporting formal education (e.g. *Treasure Island*, *Animal Farm*, *Roald Dahl*), including downloading audio for playing in the car.

“A lot of the books are still on the curriculum, like Animal Farm.”

35-54/ N London
Where could delivery be improved (promoting education and learning)?

There was seen to be room for improvement in Radio 7’s performance in helping listeners learn new things while enjoying programmes and content. Therefore, audiences saw there was potential to increase educational content in the schedule, but it was also seen as key not to detract from the core appeal of station. This purpose was not typically viewed as a priority in terms of overall Radio 7 appeal.

However audiences did appreciate the ability to learn from content on the station, and parents also valued the educational role it played for children. Some audience ideas for potential improvements to delivery in this area were more discussion/analysis of educational content (e.g. review shows of the literary classics). Some were also keen on providing comedy based/alternative ‘takes’ on historical events (providing the ability to learn while enjoying content).

“I’d love my kids to get into it. So many kids won’t sit down to read so there might be a way to engage them on 7 – to take bits in that are educational but also fun.”

35-54/ N London

6.5.4 Nations, regions and communities purpose

NB: The nations, regions and communities purpose was only discussed in the qualitative research, and not covered in the quantitative research (hence there is no chart for performance vs. importance rating for Radio 7 on the nations, regions and communities purpose).

Audiences initially struggled to relate Radio 7 to delivering against this purpose and viewed it as a low priority. Representing different parts of the UK was not seen as important by the majority of the audience, in part because the content was not contemporary and therefore not part of its remit when it was originally made.

However, when prompted, some identified a link between Radio 7 and providing content for communities with shared interests e.g. comedy or science fiction.

“It’s the place for archive comedy and sci-fi. It’s probably the only place I can think of for sci-fi fans. ... [Prompted] It does have a bit of a community feel, yes.”

35-55/N London

Therefore, there were some suggestions for further emphasising/developing the role of Radio 7 in relation to special interests e.g. making it a platform for new comedy, or a key destination for science-fiction fans.
7.0 APPENDICES

7.1 Quantitative Questionnaire
7.2 Discussion Guide (qualitative research)
The BBC has a duty to 'inform, educate and entertain' the UK public in return for the licence fee that is charged. In order to ensure that this is carried out well, there are a number of specific objectives that the BBC must consider in its activities. This survey contains a number of statements that reflect the objectives of the BBC. We would like you to think about these statements in relation to BBC Radio 3 and rate how well you think BBC Radio 3 is currently doing and how important each is to you. This questionnaire will be collected by the person who recruited you to take part in the survey. Please complete this by 11th June.

Please use an x in the relevant box to indicate how you feel. Where possible please indicate a positive or negative response rather than remaining neutral. Your responses will remain anonymous and will be aggregated with others so please give your honest opinion.

Q1 For each statement, please x the box which most closely represents your current attitude or feelings towards BBC Radio 3. The first question looks at how much you agree with the statement and the second question seeks to understand how important this activity is to you.

<table>
<thead>
<tr>
<th>Statement</th>
<th>To what extent do you agree with this statement in relation to BBC Radio 3?</th>
<th>How important is this to you?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Disagree</td>
<td>Agree</td>
</tr>
<tr>
<td>C1 BBC Radio 3 provides high quality independent news bulletins</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C2 BBC Radio 3 makes news and current affairs and other topical issues</td>
<td></td>
<td></td>
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<tr>
<td>G2 BBC Radio 3 helps me understand and appreciate different cultures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E1 I have learned new things while enjoying programmes or content on</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E2 BBC Radio 3 helps children/teens with what they learn at school/college</td>
<td></td>
<td></td>
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<td>N1 BBC Radio 3 is good at portraying each nation (Scotland/England/Wales/Northern Ireland) to other people in the UK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>N2 BBC Radio 3 is good at portraying my particular culture or community to other people in the UK</td>
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<td></td>
</tr>
<tr>
<td></td>
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<td>How important is this to you?</td>
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<td>---</td>
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</tr>
<tr>
<td></td>
<td>Disagree</td>
<td>Agree</td>
</tr>
<tr>
<td></td>
<td>Completely</td>
<td>Strongly</td>
</tr>
<tr>
<td>N3</td>
<td>BBC Radio 3 provides programmes and content that caters for my region</td>
<td></td>
</tr>
<tr>
<td>N4</td>
<td>BBC Radio 3 provides programmes and content that caters for my particular culture or community</td>
<td></td>
</tr>
<tr>
<td>N5</td>
<td>BBC Radio 3 provides me with the opportunity to share the same experiences with other people (like major events, live events and popular programmes)</td>
<td></td>
</tr>
<tr>
<td>N6</td>
<td>BBC Radio 3 helps me feel more involved and interested in my local communities</td>
<td></td>
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<tr>
<td>N7</td>
<td>BBC Radio 3 reflects a range of religious and other beliefs</td>
<td></td>
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<tr>
<td>N9</td>
<td>BBC Radio 3 keeps me up to date and informed about UK arts and culture</td>
<td></td>
</tr>
<tr>
<td>D1</td>
<td>BBC Radio 3 provides quality content that I find enjoyable or useful on the internet e.g. <a href="http://www.bbc.co.uk/radio3">www.bbc.co.uk/radio3</a>, iPlayer</td>
<td></td>
</tr>
<tr>
<td>D2</td>
<td>BBC Radio 3 encourages me to go to content that I find enjoyable or useful on interactive TV e.g. BBC Red Button service providing additional coverage of music events such as The Proms</td>
<td></td>
</tr>
<tr>
<td>I1</td>
<td>BBC Radio 3 has lots of fresh and new ideas</td>
<td></td>
</tr>
<tr>
<td>I2a</td>
<td>BBC Radio 3 helps me enjoy my interest in music</td>
<td></td>
</tr>
<tr>
<td>I15</td>
<td>BBC Radio 3 helps me enjoy my interest in drama</td>
<td></td>
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<tr>
<td>I16</td>
<td>BBC Radio 3 plays a part in shaping the UK arts agenda</td>
<td></td>
</tr>
</tbody>
</table>

Page 66 of 86
<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>To what extent do you agree with this statement in relation to BBC Radio 3?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete</td>
<td>Strongly</td>
<td>Slightly</td>
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<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
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</table>

| How important is this to you? |
| Complete | Strongly | Slightly | Neither | Slightly | Strongly | Completely |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
### Q2: How would you rate BBC Radio 3 in terms of overall quality on a scale of 1 to 10?

Where

1 = extremely poor quality and

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</table>

### Q3: Thinking about BBC Radio 3, which shows, or features within a particular show, do you think are of particularly high quality?

Please list as many as you like, providing a reason, if possible, of why you feel this is a high quality feature / programme.

If you do not feel BBC Radio 3 has any high quality features, please write "none".

### Q4: The licence fee, which pays for all BBC services, costs £145.50 per year and must be paid by every household with a colour television. Of the £145.50 a total of £2.18 goes towards BBC Radio 3. To what extent do you feel that BBC Radio 3 represents value for money, for you and your household?

<table>
<thead>
<tr>
<th>BBC Radio 3 represents...</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Very good value</td>
<td>☐</td>
</tr>
<tr>
<td>Fairly good value</td>
<td>☐</td>
</tr>
<tr>
<td>Fairly poor value</td>
<td>☐</td>
</tr>
<tr>
<td>Very poor value</td>
<td>☐</td>
</tr>
<tr>
<td>Don't know</td>
<td>☐</td>
</tr>
</tbody>
</table>
Please now think about the BBC generally rather than a specific radio station, TV channel or website; we want to know your opinion based on the whole of the BBC’s offering.

<table>
<thead>
<tr>
<th></th>
<th>Extremely unfavourable</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
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<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q5</td>
<td>What is your overall impression of the BBC on a scale of 1 one to 10? Where 1 = extremely unfavourable and 10 = extremely favourable?</td>
<td></td>
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Thank you very much for taking the time to complete this survey. Your recruiter will arrange a time to collect this document from you prior to the focus group.
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Please use an * in the relevant box to indicate how you feel. Where possible please indicate a positive or negative response rather than remaining neutral. Your responses will remain anonymous and will be aggregated with others so please give your honest opinion.

For each statement, please * the box which most closely represents your current attitude or feelings towards BBC Radio 4. The first question looks at how much you agree with the statement and the second question seeks to understand how important this activity is to you.

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<tbody>
<tr>
<td></td>
<td>Disagree</td>
<td>Agree</td>
</tr>
<tr>
<td></td>
<td>Completely</td>
<td>Strongly</td>
</tr>
<tr>
<td>C1 BBC Radio 4 provides high quality independent news and current affairs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C2 BBC Radio 4 makes news and current affairs and other topical issues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C3 BBC Radio 4 coverage of news and current affairs has got me talking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C4 BBC Radio 4 helps me understand UK-wide politics</td>
<td></td>
<td></td>
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<tr>
<td>C5 BBC Radio 4 helps me understand politics in Europe</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C6 BBC Radio 4 helps me understand politics in my nation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C7 BBC Radio 4 helps me understand politics in the other nations of the UK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C8 BBC Radio 4 offers high quality intelligent speech programming</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statement</td>
<td>Disagree</td>
<td>Agree</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>To what extent do you agree with this statement in relation to BBC Radio 4?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>G1 BBC Radio 4 helps me understand what's going on in the wider world, such as international news and events</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>G2 BBC Radio 4 helps me understand and appreciate different cultures and lifestyles from around the world</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>E1 I have learned new things while enjoying programmes or content on BBC Radio 4</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>E2 BBC Radio 4 helps children/teens with what they learn at school/college</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>N1 BBC Radio 4 is good at portraying each nation (Scotland/England/Wales/Northern Ireland) to other people in the UK</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>N2 BBC Radio 4 is good at portraying my particular culture or community to other people in the UK</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>N3 BBC Radio 4 provides programmes and content that caters for my region</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>N4 BBC Radio 4 provides programmes and content that caters for my particular culture or community</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>N5 BBC Radio 4 provides me with the opportunity to share the same experiences with other people (like major events, live events and popular programmes)</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>N6 BBC Radio 4 helps me feel more involved and interested in my local communities</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>N7 BBC Radio 4 reflects a range of religious and other beliefs</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>N8 BBC Radio 4 raises my awareness and understanding of different religions and other beliefs</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>D1 BBC Radio 4 provides quality content that I find enjoyable or useful on the internet e.g. <a href="http://www.bbc.co.uk/radio4">www.bbc.co.uk/radio4</a>, iPlayer</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
<tr>
<td>D3 BBC Radio 4 has helped me make the most of new technologies such as the internet</td>
<td>Complete</td>
<td>Strongly</td>
</tr>
</tbody>
</table>

Page 71 of 86
<table>
<thead>
<tr>
<th></th>
<th>Completely</th>
<th>Strongly</th>
<th>Slightly</th>
<th>Neither</th>
<th>Slightly</th>
<th>Strongly</th>
<th>Completely</th>
</tr>
</thead>
<tbody>
<tr>
<td>I1</td>
<td>BBC Radio 4 has lots of fresh and new ideas</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>I2</td>
<td>BBC Radio 4 helps me enjoy my interests, hobbies and passions</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<tr>
<td>I3</td>
<td>BBC Radio 4 introduces me to new interests, hobbies and passions</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<tr>
<td>I4</td>
<td>BBC Radio 4 provides programmes and content which cover a wide range of cultural and creative activities</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<td>□</td>
</tr>
<tr>
<td>I5</td>
<td>Programmes or content on BBC Radio 4 sometimes make me want to take part in a specific event or activity</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>I6</td>
<td>BBC Radio 4 has a wide range of enjoyable and entertaining programmes and content eg. comedy, drama, stories, features, readings</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>I7</td>
<td>BBC Radio 4 introduces me to new presenters, actors and writers from the UK</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>I8</td>
<td>BBC Radio 4 has programmes and content that are inventive and imaginative</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
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</table>
Q2 How would you rate BBC Radio 4 in terms of overall quality on a scale of 1 to 10?
   Where 1 = extremely poor quality and

<table>
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Q3 Thinking about BBC Radio 4, which shows, or features within a particular show, do you think are of particularly high quality?
   Please list as many as you like, providing a reason, if possible, of why you feel this is a high quality feature / programme.
   If you do not feel BBC Radio 4 has any high quality features, please write “none”.

Q4 The licence fee, which pays for all BBC services, costs £145.50 per year and must be paid by every household with a colour television. Of the £145.50 a total of £4.66 goes towards BBC Radio 4. To what extent do you feel that BBC Radio 4 represents value for money, for you and your household?

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<tr>
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Please use an × in the relevant box to indicate how you feel. Where possible please indicate a positive or negative response rather than remaining neutral. Your responses will remain anonymous and will be aggregated with others so please give your honest opinion.

Q1 For each statement, please × the box which most closely represents your current attitude or feelings towards BBC Radio 7. The first question looks at how much you agree with the statement and the second question seeks to understand how important this activity is to you.

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<td></td>
<td>Disagree</td>
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</tr>
<tr>
<td></td>
<td>Completely</td>
<td>Strongly</td>
</tr>
<tr>
<td>E1 I have learned new things while enjoying programmes or content on BBC Radio 7</td>
<td>□ □ □ □ □ □</td>
<td></td>
</tr>
<tr>
<td>E2 BBC Radio 7 helps children/teens with what they learn at school/college</td>
<td>□ □ □ □ □ □</td>
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</tr>
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<td>D1 BBC Radio 7 provides quality content that I find enjoyable or useful on the internet e.g. <a href="http://www.bbc.co.uk/radio7">www.bbc.co.uk/radio7</a>, iPlayer</td>
<td>□ □ □ □ □ □</td>
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<tr>
<td>D3 BBC Radio 7 has helped me make the most of new technologies such as the internet</td>
<td>□ □ □ □ □ □</td>
<td></td>
</tr>
<tr>
<td>I1 BBC Radio 7 has lots of fresh and new ideas</td>
<td>□ □ □ □ □ □</td>
<td></td>
</tr>
<tr>
<td>I2 BBC Radio 7 helps me enjoy my interests, hobbies and passions</td>
<td>□ □ □ □ □ □</td>
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<tr>
<td>13</td>
<td>BBC Radio 7 introduces me to new interests, hobbies and passions</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>BBC Radio 7 provides programmes and content which cover a wide range of cultural and creative activities</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>BBC Radio 7 has a wide range of enjoyable and entertaining programmes and content eg. comedy, drama, stories, features, readings</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>BBC Radio 7 introduces me to new presenters, actors and writers from the UK</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>BBC Radio 7 has programmes and content that are inventive and imaginative</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>BBC Radio 7 has a good range of children's programming</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>BBC Radio 7 provides a good balance of existing material and original content</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>BBC Radio 7 offers content that is not widely available on other BBC radio stations</td>
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</table>

**Extremely poor quality**

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**Extremely good quality**

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**How important is this to you?**
Q2 How would you rate BBC Radio 7 in terms of overall quality on a scale of 1 to 10?

Where

1 = extremely poor quality and

Q3 Thinking about BBC Radio 7, which shows, or features within a particular show, do you think are of particularly high quality?

Please list as many as you like, providing a reason, if possible, of why you feel this is a high quality feature / programme.

If you do not feel BBC Radio 7 has any high quality features, please write “none”.

Q4 The licence fee, which pays for all BBC services, costs £145.50 per year and must be paid by every household with a colour television. Of the £145.50 a total of £0.29 goes towards BBC Radio 7. To what extent do you feel that BBC Radio 7 represents value for money, for you and your household?

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<th>BBC Radio 7 represents...</th>
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<tr>
<td>Very good value ......................</td>
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<td>Very poor value ...............</td>
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<td>Don’t know .........................</td>
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Please now think about the BBC generally rather than a specific radio station, TV channel or website; we want to know your opinion based on the whole of the BBC’s offering.
Q5. What is your overall impression of the BBC on a scale of 1 one to 10?

Where

1 = extremely unfavourable and

Thank you very much for taking the time to complete this survey. Your recruiter will arrange a time to collect this document from you prior to the focus group.
7.2: Qualitative Discussion Guide

DISCUSSION PLAN

Project: Radio Service Review
JOB NUMBER: BBC 14144L
Type: Group Discussions

Introduction

- Thank respondents for coming (thank for completing Pre Task Diary)
- Explanation of purpose and operation of evening;
  - Introduce self, Qmedia – who, what we are
  - Purely research – no selling, no right/wrong answers, all opinions valid, difference is expected, participation from all, importance of honesty
  - Structure of evening, eg informal, timings, what doing/talking about
  - Confidentiality of personal details, no follow-up
  - Audio/video recording – why, uses and permission
  - Viewing - why
  - Housekeeping – refreshments, toilets, mobiles off.
- Any questions, concerns?

<table>
<thead>
<tr>
<th>Discussion Areas</th>
<th>Time</th>
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<tr>
<td>Opening Session</td>
<td>10 minutes</td>
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<tr>
<td>Radio Consumption Behaviour</td>
<td>10 minutes</td>
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<tr>
<td>Radio 3/Radio 4/ Radio 7 Focus</td>
<td>15 minutes</td>
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<tr>
<td>Introducing the purposes</td>
<td>15 minutes</td>
</tr>
<tr>
<td>Purpose mapping</td>
<td>20 minutes</td>
</tr>
<tr>
<td>Unpicking the purposes</td>
<td>40 minutes</td>
</tr>
<tr>
<td>Priorities and development</td>
<td>10 minutes</td>
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* = Key/important sections
Opening Session (10 minutes)

**Objective:** to relax all respondents and allow them to become familiar with each other and the group environment

RESPONDENTS WILL BE ASKED TO INTRODUCE THEMSELVES

- Age
- Family/household
- Occupation
- Interests
- My favourite radio programme and why

MODERATOR TO EXPLAIN THAT THE FOCUS OF THE SESSION WILL BE FLEXIBLE AND ACCORDING TO CONVERSATIONAL FLOW (EXERCISES TO BE USED ACCORDINGLY)

Radio Consumption Behaviour (10 minutes)

**Objective:** to provide an understanding of ‘real life’ radio listening behaviour and where the relevant BBC services fit into this

MODERATOR WILL USE A 7 DAY DIARY BOARD TO ENABLE RESPONDENTS TO IDENTIFY AND DISCUSS DIFFERENT RADIO LISTENING OCCASIONS AND NEED STATES

- Where does radio fit into your lives
- When do you listen
- Where do you listen
- How do you listen
  - Establish different devices/channels
  - Explore any mentions of listening online (live or via time shifted)
- What else are you doing whilst you are listening to the radio
- Where are you
- Who are you with
- How does your engagement (eg attention, enjoyment, needs) vary across the different occasions when you listen to the radio
- Has your radio listening behaviour changed in the last 1 year/5 years/10 years
- What radio stations/programmes do you listen to…
MODERATOR TO NOTE DOWN ON FLIP CHART AND BRIEFLY EXPLORE BEHAVIOUR AND ATTITUDES FOR EACH – FULLY EXPLORE ANY MENTIONS OF RADIO BBC3, RADIO BBC4, RADIO BBC7

• How do you decide what to listen to
  • What factors influence this
  • How do you arrive at a specific station/programme
  • What prompts you to change stations

• Where does each station/programme fit into your weekly listening schedule

• What role/need does each fulfil

• What are do you like/dislike about each of the radio stations that you listen to

• Is listening driven by specific programmes/presenters or the station as a whole

• Which do you value more/less and why….which is your favourite

• What would you change about the radio stations that you listen to


Objective: to provide contextual understanding of audience attitudes to each of the services (before introducing the purpose remit framework)

MODERATOR TO PRIORITISE EXPLORATION IN LINE WITH GROUP TYPE (EG RADIO 4 PRIMARY FOCUS AND RADIO 3 AND RADIO 7 SECONDARY FOCUS IN RADIO 4 SESSIONS; RADIO 3 PRIMARY FOCUS AND RADIO 4 AND RADIO 7 SECONDARY FOCUS IN RADIO 3 SESSIONS ETC)

• What words would you associate with Radio 3/Radio 4/Radio 7 FOCUS ON STATIONS INDIVIDUALLY AS APPROPRIATE TO GROUP TYPE

• What words would you to use to describe the station

• What programmes, presenters, music, other content, time of day etc do you associate with the station

MODERATOR TO NOTE DOWN ALL WORDS ON FLIP CHART AND THEN PROMPT WITH SCATTERBOARD (SEE APPENDIX 1)

• To what extent would you associate the station with each of these words
  • Why/why not
  • Note – If listeners say ‘all’, are there words that they would more/less strongly associate with the station
  • What specific elements of the station offer are driving these associations

• Are there other stations that you listen to that you would more strongly associate with any of these words
• How important are each of these words in relation to;
  • Why you listen to this specific station
  • What you want from this station

• Specifically explore any references of quality
  • What drives perceptions of quality for radio services
  • How are Radio 3/Radio 4/Radio 7 perceived in this context
  • Which elements specifically
  • Are any competitor stations associated more strongly with quality - why

MODERATOR TO CIRCLE MOST VALUED/IMPORTANT CHARACTERISTICS ON SCATTER BOARD

MODERATOR TO USE WORD ASSOCIATION EXERCISE AS A PLATFORM FOR EXPLORING AND
ESTABLISHING AUDIENCE VIEWS IN RELATION TO CURRENT STATION OFFER OF;

• Key strengths
• Key weaknesses
• Attitudes to programmes, presenters, schedule, music and speech content
• Delivery on expectations
• Any changes/improvements wanted

MODERATOR TO INTRODUCE WORD/IMAGE BOARDS OF STATION PROGRAMMES, PRESENTERS
AND SCHEDULE TO PROMPT DISCUSSION (AS NECESSARY)

MODERATOR TO NOTE DOWN KEY ATTITUDES ON FLIP CHART

REPEAT/REFERENCE MUCH MORE BRIEFLY AND AS APPROPRIATE FOR OTHER STATIONS
LISTENED TO (EG FOR RADIO 4 SESSIONS REPEAT FOR RADIO 3 AND RADIO 7 LISTENERS)

Introducing the purposes (15 minutes)

Objective: to explore audience perceptions of the purposes and their comparative importance for radio

MODERATOR WILL EXPLAIN THAT WE ARE NOW GOING TO LOOK AT A NUMBER OF SPECIFIC
STATEMENTS THAT SET OUT FOR THE BBC HOW IT SHOULD CARRY OUT ITS FUNCTIONS.

MODERATOR WILL INTRODUCE EACH PURPOSE (WITH INTERPRETIVE HEADING AND STATEMENT)
AND EXPLORE AUDIENCE PERCEPTIONS/ATTITUDES (NOTE – MODERATOR NOT TO SPEND TOO
LONG)
MODERATOR TO FOCUS ON COMMUNICATING THE MEANING OF EACH PURPOSE (VS THE SPECIFIC LANGUAGE USED),

1) Sustaining citizenship (news and factual)

Providing high-quality news, current affairs and factual programming that keeps you informed and supports debate about important issues and political developments in an engaging way

2) Promoting education and learning (education)

Supporting formal education in schools/colleges and offering engaging ways for everyone to build their knowledge and skills across a broad range of subjects.

3) Stimulating creativity and cultural excellence (creativity and culture)

Offering the best examples of creative work that engage and excite audiences, breaking new ground and encouraging interest in cultural, creative and sporting activities

4) Reflecting the UK’s nations, regions and communities (representing local and communities)

Reflecting the many communities that exist in the UK (eg based on geography, on faith, on language, or on a shared interest such as sport). Stimulating debate within and between the communities of the UK and encouraging people to get involved with their local communities

5) Bringing the UK to the world and the world to the UK (international)

Providing internationally-respected news services to audiences around the world and keeping you in touch with what is going on in the world and giving you an insight into the way people live in other countries.

6) Emerging communications (New technologies)

You can expect the BBC to help everyone in the UK to get the best out of emerging media technologies now and in the future (eg iPlayer)

MODERATOR TO LEAD DISCUSSION AROUND;

- How do respondents interpret and understand the statements in relation to BBC (in general) OBSERVE AND EXPLORE THE LANGUAGE USED

- How important are they in relation to what audiences value from BBC services REFER BACK TO EARLIER DISCUSSION

- How do each of the BBC services differ – PROMPT ON RADIO, TV AND ONLINE AS EXAMPLES
* Purpose Mapping (20 minutes)

**Objective:** to understand how Radio 3/Radio 4/Radio 7 are perceived in relation to the BBC purposes in a wider BBC and commercial competitor context

MODERATOR TO INTRODUCE ALL OF THE BBC RADIO STATIONS LOGO’S ON SORT CARDS (SEE APPENDIX 2) AND GRID (ON A3 BOARD) OF THE 6 PURPOSES

RESPONDENTS WILL BE TASKED WITH MAPPING THE STATIONS AGAINST THE PURPOSES AND MODERATOR WILL THEN WRITE THE MOST HEAVILY ASSOCIATED STATIONS NEXT TO EACH PURPOSE ON THE GRID

- Which BBC radio stations are perceived as most strongly contributing to delivery on each purpose
- What specific elements of these stations are driving these perceptions

NOTE ANY MENTIONS OF RADIO 3/RADIO 4/RADIO 7 AND THEN SPECIFICALLY EXPLORE

- Which purposes are Radio 3/Radio 4/Radio 7 perceived as contributing to
- Which more/less strongly and why NOTE – IF RESPONDENTS SAY ALL (EG FOR RADIO 4), IMPORTANT TO PROBE ON COMPARATIVE STRENGTH OF CONTRIBUTION
- Which purposes do audiences feel are most important in relation to Radio 3/Radio 4/Radio 7 and why NOTE – MODERATOR TO BE AWARE THAT RADIO 7 DOES NOT HAVE SUSTAINING CITIZENSHIP OR BRINGING THE UK TO THE WORLD AND WORLD TO UK WITHIN SERVICE LICENCE (ALTHOUGH STILL EXPLORE ANY REFERENCES)
- Are there any wider/competitor stations (in relation to Radio 3/Radio 4/Radio 7) that listeners would more strongly associate with each purpose
- Where are the gaps between purpose remit and audience perceptions for the three BBC radio stations

RESPONDENTS TO BE GIVEN INDIVIDUAL WORKSHEETS AND ASKED TO RANK THE PURPOSES IN TERMS OF IMPORTANCE FOR SPECIFIC RADIO SERVICE BEING DISCUSSED (IE RADIO 3/RADIO 4/RADIO 7)
Unpicking the purposes (40 minutes)

Objective: to provide a more in depth understanding of the how the services are delivering on the different components of each relevant purpose

FOCUSING ON THE MAIN STATION IN RELATION TO EACH GROUP TYPE (RADIO 3/RADIO 4/RADIO 7) MODERATOR TO EXLORE EACH OF THE PURPOSES (AS HIGHLIGHTED IN THAT STATION’S SERVICE LICENCE);

- What does this purpose mean in relation to the station – how is it interpreted

UNPROMPTED AND THEN MODERATOR TO PROMPT USING EXAMPLES (SEE APPENDIX 3)

- To what extent is it delivering on this purpose
- Which elements of the station specifically MODERATOR TO RE-INTRODUCE PROMPT BOARDS FOR PROGRAMMES, PRESENTERS AND SCHEDULE
- How important is this purpose in driving audience value and engagement with the station
- Explore which specific elements REFERRING TO SORT CARDS OF MEASURES
- To what extent is this purpose associated with quality perceptions for the station
- Where are the gaps between the purpose remit and the service delivery
- Which of these are most important to audiences
- Are there any areas where the station provides value that audiences feel aren’t covered by one of the purposes
- What (if any) are the priority areas for the station for more effectively delivering on its service licence remit

REPEAT FOR EACH OF THE PURPOSES RELEVANT TO THE MAIN STATION BEING EXPLORED

TIME PERMITTING AND AS APPROPRIATE TO GROUP TYPE, REPEAT FOR THE TWO OTHER STATIONS BEING COVERED BY THE SERVICE REVIEW

Priorities and Development (10 minutes)

Objective: to establish focus for improving service delivering on remit in line with audience priorities

FOR MAIN STATION (RADIO 3/RADIO 4/RADIO 7) BEING EXPLORED IN SESSION;

- Summarise;
1. Audience perceptions of delivery on purposes
2. Which purposes (and specific elements) are most important to audiences
3. Which purposes drive perceptions of quality
4. Any gaps in service provision (or where is service provision less strong)

- What would the station need to do differently
- What would it need to add to its offer
- Which other BBC/competitor stations could they learn from
- What are the priorities from an audience perspectives

MODERATOR TO THANK AND CLOSE