

Section 3: BBC Radio 1

Radio 1's remit is 'to entertain and engage a broad range of young listeners with a distinctive mix of contemporary music and speech. It should reflect the lives and interests of 15-29 year olds but also embrace others who share similar tastes. It should offer a range of new music, support emerging artists - especially those from the UK - and provide a platform for live music. News, documentaries and advice campaigns should cover areas of relevance to young adults.'

Our assessment of performance

Radio 1's high reach to young people makes it a very important service for the BBC. It is highly effective at delivering some of the BBC's public purposes to young people. We believe it has potential to deliver some further public value, given the strength of its market position; in particular we have asked the station to renew its focus on serving a young audience and to deliver more public value via its speech output.

3.1 REACH

Radio 1 reaches a large number of young people, making it an important part of the BBC's overall offering to young people

In 2008, around 5 million 15 to 29 year olds listened to Radio 1 each week, some 43 per cent of all 15 to 29 year olds in the UK. Of these, around 3.1 million did not listen to any other BBC radio output in an average week.⁵⁸ Radio 1's reach to 15 to 29 year olds is considerably higher than any other radio station (Figure 13), and is the BBC's second largest service for this age group across television, radio and online, behind only BBC One.

⁵⁸ RAJAR, 2008. All RAJAR listening data is based on calendar year (January – December), for all individuals aged 4+, unless otherwise stated.

Figure 13: Radio 1 reaches more 15 to 29 year olds than any other radio station

Weekly reach: 15 to 29 year olds		
	Millions	%
BBC Radio 1	5.0	43
BBC Radio 2	1.4	12
The Hits	1.1	9
BBC Radio 5 Live	0.9	8
Smash Hits Radio	0.7	6
BBC Radio 4	0.7	6
Absolute Radio	0.4	4
Classic FM	0.6	5
TalkSPORT	0.6	5
1Xtra	0.4	4

Source: RAJAR, 2008, 15 minute weekly reach

Radio 1 also reaches a large number of people outside its 15 to 29 year old target age group

Some 12.7 million people listened to Radio 1 each week in 2008. As well as the 5 million 15 to 29 year olds, Radio 1 reached just less than 2 million listeners below the age of 15, and 5.8 million listeners aged over 30. This means that 40 per cent of Radio 1's listeners are aged between 15 and 29, while its average listening age is within - but at the very upper end - of its target age group. Radio 1's mean listening age is 29 and the median listening age is 28.

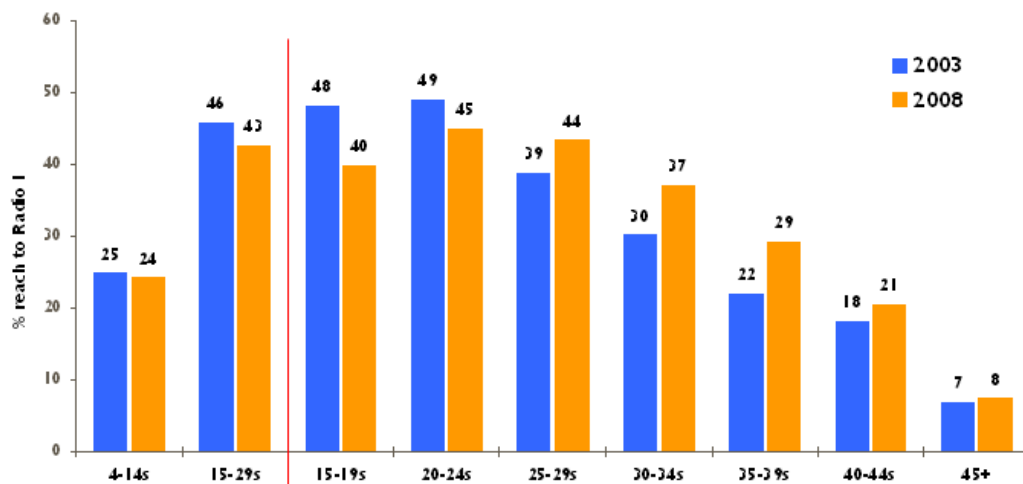
To some degree, it is inevitable that radio stations attract listeners outside their target age group – particularly Radio 1 which has access to national FM spectrum and has built a strong brand over many years. In addition, the way people listen to radio means that they often listen without specifically choosing, or wanting, to listen, for example in places they do not have control of the radio such as in the workplace or in cars. The result is that, for instance, more than half the listeners to Kiss FM – a commercial radio station with a remit to attract 'primarily under 30s in the London area', and one of the most successful FM radio stations at attracting a young audience - are not aged between 15 and 29.

Radio 1's reach to young people has fallen slightly in recent years, particularly at the lower end of its target age group

In 2008, Radio 1 reached slightly more 15 to 29 year olds than it did in 2003. However the overall number of people aged 15 to 29 in the UK population has risen over this period, with the result that, across the five year period, Radio 1's percentage reach to 15 to 29 year olds has fallen by around 3 percentage points.

The biggest fall is among listeners aged 15 to 19, where reach has fallen from 48 per cent to below 40 per cent; while a lower percentage of 20 to 24 year olds are also now listening to Radio 1 (Figure 14). Conversely, Radio 1 is reaching significantly more 30 to 39 year olds. These trends in listening were reflected by the young people aged 14 to 25 we spoke to as part of this review, who expressed a general sense that Radio 1 was aimed more towards the older end of its target age group than the younger end.⁵⁹

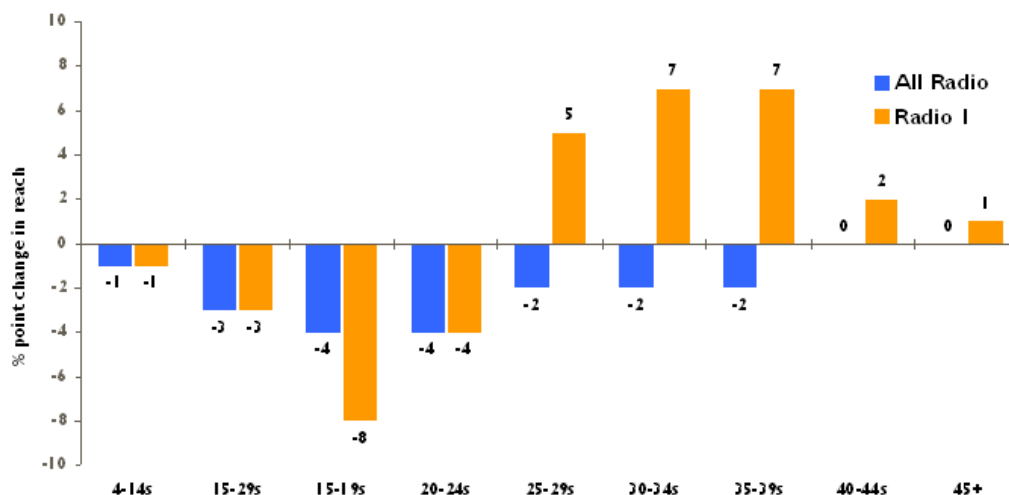
⁵⁹ Events organised and run by the British Youth Council

Figure 14: Radio 1's weekly reach to different age groups over time

Source: RAJAR, 2003 and 2008, 15 minute weekly reach

The decline in listening to Radio 1 among its target audience partly reflects a wider decline in radio listening among young people

The fall in Radio 1's reach among its target audience is in line with a more general decline in listening to radio among young people. However, over the past five years, Radio 1's reach among 15 to 19 year olds has fallen at more than twice the rate of decline of all radio for this age group. In addition, Radio 1's increasing usage among those above 25 goes against the trend of radio in general, particularly for those aged between 30 and 39 (Figure 15).

Figure 15: The change in reach to Radio 1 and all radio by different age groups (2003 to 2008)

Source: RAJAR, 2003 – 2008, change in weekly reach by age group

The trends in listening to Radio 1 – the decline in younger listeners and the increase in listeners aged over 30 – reflect some factors beyond its control, in particular:

- Technological trends. Audiences can now access radio stations through a range of different media, including online, on digital sets including television, on

demand and through mobile phones, although only live listening via such platforms is recorded by RAJAR. The ways in which audiences can consume music have also changed, with mass consumption through personal MP3 players and online services such as YouTube and MySpace. These changes challenge the ability of traditional radio stations to reach audiences, particular younger audiences who tend to take up new technology more quickly.

- Music trends. In general, Radio 1 has a strong focus on new and chart music (covered in detail in Section 3.3) which fits well with targeting a young audience. However a wider trend within the music industry indicates that the appeal of much of contemporary pop music has broadened across different age groups, making it more difficult for radio stations which play chart music to target an exclusively young demographic.

However, the changes in listening patterns also reflects, in part, the successful implementation of a Radio 1 strategy agreed by the BBC's Board of Governors in 2003. This strategy was designed to address the challenges faced by Radio 1 at that time, and led to the station developing a more inclusive editorial tone designed to appeal more to a mainstream young audience, not just passionate music fans. We believe there are now opportunities for Radio 1 to renew its focus on serving a young target audience.

We will track the impact of the measures BBC management are taking to keep Radio 1 relevant to young audiences

If the trends in listening patterns outlined above continue unchecked, we predict that, over time, Radio 1's reach to younger audiences will fall, and the station's ability to deliver the BBC's public purposes to a young audience will be reduced. BBC management's submission to this review outlined a range of measures designed to increase Radio 1's appeal to younger listeners:

- The launch of a **Switch** zone in 2007 targeting teenagers and young adults for five hours on a Sunday evening.
- Further development of **multiplatform** activities using Radio 1 online and third party websites.
- Introducing some new **younger presentation talent** to the station.

We will track the impact of the steps taken by Radio 1 on the station's reach to young listeners and its median listening age. If the changes made by the station are not reflected positively in these performance measures by this time next year, then we will ensure that BBC management takes further action.

We agree with some submissions to this review from those in, and representing, commercial radio that highlight the daytime schedule as key to driving performance in this area, although we do not agree that the age of daytime presenters necessarily correlates to the age profile of listeners.

We recognise that a national radio station cannot precisely target listeners on the basis of age, and that reaching listeners outside the target age group is inevitable, particularly given Radio 1's strong brand built up over many years. This realism was the reason for the service licence currently stating that Radio 1 should target 15 to 29 year olds, but 'also embrace others who share similar tastes'. While we judge Radio 1's performance primarily in terms of its reach amongst younger audiences, we recognise that the wording of the service licence is ambiguous, and may be seen by some external stakeholders as allowing Radio 1 too much scope to appeal to older listeners.

Action 6

While we do not believe that any radio station can restrict listening only to its stated target audience, we do expect Radio 1 to focus on serving 15-29 year olds, rather than older listeners. To reinforce this expectation, we are tightening the wording of Radio 1's service licence remit. This currently states that Radio 1 should target 15 to 29 year olds, but 'also embrace others who share similar tastes' and has been interpreted by some external stakeholders to mean that the station is being encouraged to target older listeners, and we will remove this wording from the service licence. We will also make clear that Radio 1 should provide some programming for younger teenagers.

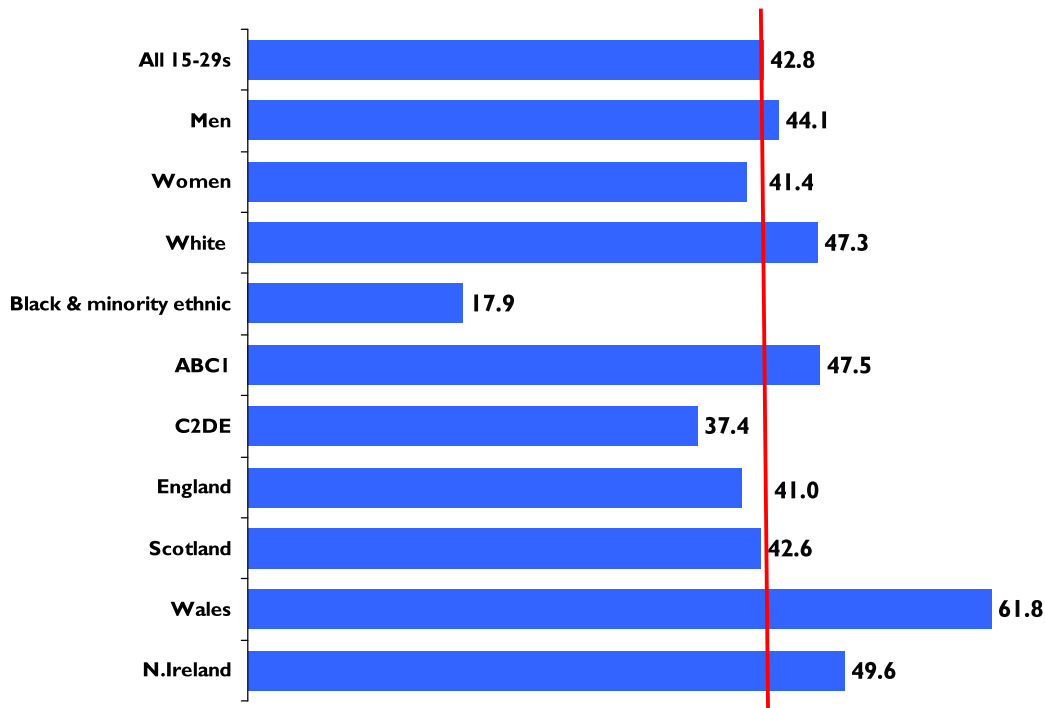
Radio 1's performance in serving a young target audience will be the focus of our routine performance assessment activity in future years. We expect Radio 1 to maintain its reach to 15 to 29 year olds and to ensure that the median age of its listeners remains within its target age range. We will track Radio 1's performance against these measures each quarter, and will report publicly on Radio 1's performance in future Annual Reports. If the changes made by the station are not reflected positively in these performance measures by this time next year, then we will ensure that BBC management takes further action.

In response to submissions from external stakeholders, we have considered amending the lower end of Radio 1's target age to start at 13. However, we believe that the service should remain editorially focussed on serving an adult audience (while assuming that children may also be listening), rather than needing to consider the needs of under 15s in all of its output which would be likely to confuse the clarity of its editorial proposition and overall tone and style.

Radio 1 reaches a broad range of young people. However its reach to young ethnic minorities is low and has declined significantly in recent years

Radio 1 has a service licence commitment to serve a broad range of young listeners. Broadly speaking, the audience profile of Radio 1 mirrors that of BBC radio as a whole and reaches a range of younger audience groups effectively (Figure 16).

Figure 16: Radio 1's weekly reach to 15 to 29 year olds amongst different demographic groups



Source: RAJAR, 2008, 15 minute weekly reach amongst 15-29 year olds

However, Radio 1's reach to ethnic minorities has fallen significantly over recent years. Around 28 per cent of ethnic minorities aged 15 to 29 listened each week in 2003, falling to just 18 per cent in 2008, compared with 43 per cent of all 15 to 29 year olds and 47 per cent of white 15 to 29s. To some degree this trend reflects the broader trends in listening to any radio among ethnic minorities, which has fallen by around 8 percentage points over the same period of time. In the case of Radio 1, this decline in reach can also partly be explained by:

- the launch of 1Xtra and Asian Network in 2002 which have stronger appeal amongst young people from ethnic minority backgrounds;
- greater competition from niche commercial radio stations in urban areas. Radio 1 reaches fewer people in London and large urban areas, where ethnic minority populations are higher, and where there is a broader choice of music stations with strong appeal to them;
- Radio 1 reflecting trends in popular music tastes which in recent years have tended towards indie and rock based acts which, in general, appeal less to some ethnic minorities.

Despite these factors, Radio 1's remit states that it should 'engage a broad range of young listeners' and we would be concerned if this disparity between white and black and minority ethnic listeners became more pronounced. We will, therefore, monitor Radio 1's reach to ethnic minority listeners closely.

Action 7

There are a number of reasons why Radio 1's reach to young ethnic minorities is low and has declined in recent years. However, we would be concerned if the disparity reach to listeners from different ethnic backgrounds becomes more pronounced. We will, therefore, monitor Radio 1's reach to ethnic minority listeners closely as part of our regular performance assessment work.

3.2 QUALITY

Audiences, particularly those among Radio 1's target audience, think Radio 1 is a high-quality service

The BBC measures the quality of its radio stations using a range of different audience surveys. On average, listeners gave Radio 1 an approval score of 7.7 out of 10, rising to 8.3 among listeners aged 15 to 29.⁶⁰ This is the highest for any BBC network radio station among this age group, while around three-quarters of 15 to 29s who listen to Radio 1 are 'high approvers' of the service, giving a score of at least 8 out of ten. Radio 1's Appreciation Index ('AI') scores⁶¹ have remained stable over the last few years, with an average of 76 out of 100 in 2008. Although this is slightly below the average AI for BBC Radio as a whole (79), and for Radio 2, the majority of responses to our public consultation were positive about Radio 1's quality in the core areas of its remit.

3.3 IMPACT – DELIVERY OF THE BBC'S PUBLIC PURPOSES

Radio 1's service licence requires it to make a contribution to all six of the BBC's public purposes, with particular emphasis on delivering the purpose to 'stimulate creativity and cultural excellence'.

Stimulating creativity and cultural excellence

Radio 1's service licence states that the station should deliver this purpose through:

- providing a significant platform for new music and emerging UK artists across a wide range of musical genres and providing a platform for live music;
- entertaining and engaging young listeners with a distinctive mix of contemporary music and speech;
- coverage of other significant aspects of cultural life, for example film, comedy and entertainment.

Radio 1 is fulfilling its remit to support new music and plays a very important role in promoting new artists in the UK

⁶⁰ PBTS, 2008, Base: Adults aged 15+

⁶¹ BBC Pulse survey, 2008

We drew on a range of evidence to assess whether BBC was fulfilling its remit in this area. In particular, we reviewed detailed content analysis commissioned by BBC management from Intelligent Media⁶² which compares the songs played on Radio 1 to those played on six comparable commercial radio stations⁶³ across two one week periods each year.⁶⁴

We have compared this analysis to that included in submissions from external stakeholders from those in, and representing commercial radio. While the figures obtained from monitoring music output in any individual week, and the approach taken to categorising of tracks, can vary significantly, where a similar methodological approach was used, the data submitted was broadly consistent to BBC management's.

Radio 1 has a service licence condition that 45 per cent of its music in daytime is new (defined as being either unreleased or less than one month since release date). Across the two sampled weeks in 2008, we found that 59 per cent of music played was new (467 out of the total of 790 plays⁶⁵). While commercial stations are not obliged to meet the same condition, we note that Radio 1 appears to be clearly distinctive in this respect. The closest commercial station included in the analysis was Galaxy FM, of which 32 per cent of music played in daytime was 'new'.

BBC management's YouGov research⁶⁶ also shows that audience perceptions that Radio 1 'plays a wide variety of new bands and new music' were high and significantly better than for comparable commercial radio stations, with 15 to 29 year olds giving Radio 1 an average score of 7.4 out of 10 compared with 6.5 out of 10 for the highest rated commercial station.

Similarly, while a minority of those who responded to our public consultation question 'what do you not like about Radio 1' cited that the playlists were too repetitive and wanted greater variety and more music, a significant majority of those who responded to our question about how well Radio 1 was providing a range of new music were positive. The response to this review from the Trust's Audience Council for England, based on a series of audience events across England, concluded that Radio 1 had a good reputation for bringing new music to listeners.

⁶² Independent analysis of two sample weeks each year. Data used based on average across May and November 2008, unless otherwise stated.

⁶³ Capital FM (London), Galaxy 105-106 (Newcastle), Key 103 FM (Manchester), Kiss 100 FM (London), Virgin FM/Absolute Radio (London) and XFM (London)

⁶⁴ BBC management measures output for new and UK music conditions four times a year, including two additional surveys in August 2008 and February 2009. To enable consistent comparison with other stations, we have reported numbers across two sample weeks in this report.

⁶⁵ Performance against the condition is measured by 'plays' rather than individual tracks. If a track is played twice it counts as two 'plays'. This method reflects the nature of Radio 1's output most accurately.

⁶⁶ YouGov purposes research September 2008 - October 2008

"It is excellent. The new music is well introduced and I've heard about many new bands and groups I would otherwise not have known about."

Respondent to our public consultation question, 'how well do you think Radio 1 provides a range of new music?', age unspecified

"Quite well, although I don't feel it is spread evenly throughout the day – mostly it is just during the evenings, when more people are watching TV"

Respondent to our public consultation question, 'how well do you think Radio 1 provides a range of new music?', aged 13 to 17

Radio 1's remit states that the station must also provide a platform for emerging musical artists, particularly through its specialist music shows. BBC management's submission to this review highlights a number of examples of success in developing emerging artists, primarily through using its specialist evening shows to introduce them to listeners. The artists are then gradually exposed into the daytime playlists. BBC management estimates that around three quarters of the songs added to daytime playlists also featured in specialist shows. Radio 1 also uses its *Upfront* playlist in daytime as a means of introducing emerging music to the station. The *Upfront* list is made up of up to five acts which have not usually been on the main Radio 1 daytime playlists previously. These songs usually get around 3 to 4 plays each in daytime across a week.

To get a better understanding of Radio 1's impact in this area, we spoke to the Association of Independent Music ('AIM'), a trade body representing independent record labels. AIM told us that Radio 1's contribution to the music industry in the UK was invaluable, in particular its willingness to take risks in supporting new artists and playing unfamiliar music.

Overall, we are satisfied that Radio 1's approach to the development and promotion of emerging artists, by gradual exposure into the daytime schedule, is appropriate and effective. The vast majority of responses to our public consultation were positive about Radio 1's support for new and emerging musical artists. While a minority of respondents felt that more could be done during daytime programming, there was also an understanding that evening shows were often the best place to introduce emerging artists to the audience.

For these reasons, we do not accept the arguments put forward to this review by those in, and representing, the commercial radio sector that Radio 1 should be required to play many more unfamiliar tracks in daytime as being either in the interests of the audience or of the artists themselves. We will however amend Radio 1's service licence to reflect better the value Radio 1 creates through supporting new music and artists.

Action 8a

Radio 1's remit states that it should "support emerging artists – especially those from the UK..." The way in which its quota for new music is defined - 'either unreleased or less than one month since release date' – does not

guarantee that any of Radio 1's new music comes from emerging artists, and theoretically all of Radio 1's new music could come from established artists.

While we have found in this review that this is not the case in practice, we will amend Radio 1's service licence to set a clearer framework for how we expect it to deliver public value in this area.

Radio 1 plays less UK music than commercial stations in daytime, although more of Radio 1's UK music qualifies as new

Radio 1 has a service licence condition that 40 per cent of its music in daytime should be from UK artists. The content analysis commissioned by BBC management shows that across the two sample weeks in 2008, just under half (48 per cent) of Radio 1's daytime plays were by UK artists or bands. This is a lower level than two of the commercial stations sampled (Virgin/ Absolute at 64 per cent and XFM at 70 per cent). However, the majority of UK music played by Radio 1 was new music (229 plays), a much higher level than for the highest commercial station sampled, XFM (169). In addition, around half of the new music played on Radio 1 in daytime was by a UK act, and there was significantly more new, UK music than on the closest commercial station.

BBC management's YouGov research also shows that younger audiences believe that Radio 1 'supports UK bands and artists' well and that they perceive it to be significantly better than comparable commercial radio stations in this respect.

Radio 1 has extensive live music activities and plays more live music than competitors, both in daytime and across all hours

In 2008-09, Radio 1 covered 27 major live music events and festivals and broadcast 356 new live sessions, against its service licence commitment to cover 25 festivals and 250 new sessions.

Content analysis showed that Radio 1 featured an average of 59 live songs across the sampled weeks. There was little live music on commercial stations surveyed other than XFM, so we are confident that Radio 1 is distinctive from other stations in this respect. We are also pleased to see that live music is not confined to off-peak specialist programming: 15 of the 59 live tracks played by Radio 1 were in the peak listening period (daytime), three times as many as nearest commercial station, XFM.

BBC management's YouGov research shows that audience perceptions that Radio 1 'covers a good range of live music and events' were very high and significantly better than for comparable commercial radio stations. Those 15 to 29 year olds that were surveyed gave Radio 1 an average score of 7.7 out of 10 compared with 6.2 out of 10 for the highest commercial station. These findings are supported by responses to our public consultation, where respondents, across all demographic groups, were almost universally positive to our question about how well Radio 1 plays and covers live music.

"The Live Lounge is fab! It gives a platform to lesser known bands and highlights the talent of better known bands"

Respondent to our public consultation question, 'how well do you think Radio 1 covers and plays live music?', age unspecified

Radio 1's specialist music output is highly valued by listeners

In 2008, Radio 1 played around 65 hours of specialist music programming each week and BBC management estimates that around 80 per cent of the music played in Radio 1's specialist shows is new, with just one-quarter from artists signed to major labels. The content analysis shows that Radio 1 plays a much greater range of songs in the evening than chosen commercial stations. BBC management's YouGov research shows that audience perceptions among 15-29 year olds that Radio 1 'has presenters who know a lot about the music they play' were high (7.4 out of 10), reflecting the role of specialist DJs as 'trusted guides' to listeners.

Radio 1 broadcasts significantly more speech than most music radio stations

Speech forms a significant part of Radio 1's output, around 42 per cent in daytime. This includes presenter chat, but also news bulletins and social action/advice (covered later in this section). The levels of speech are a key difference from commercial music radio, where generally the levels of speech are much lower, even when adverts are taken into account. Content analysis shows that, across the sampled weeks, Radio 1's output contained twice as much speech as on Capital and almost three times as much as Galaxy.

The primary aim of Radio 1's presenter speech is to entertain the audience and support the delivery of the station's public purposes.

The vast majority of Radio 1's presenter speech is designed to entertain the audience. We believe that this is legitimate for Radio 1 and fits with its remit. It also supports the reach and impact of the station, driving delivery of public purposes, particularly around the delivery of news and new music. Audience data⁶⁷ shows that the most common reason for listening to Radio 1 is because they 'like the presenters'.

This is supported by BBC management's YouGov research, where 15 to 29 year olds rated Radio 1 higher than comparable commercial stations for 'having entertaining presenters', and responses to our public consultation where over three quarters of responses to the question 'what do you think is good about Radio 1' referred to the presenters, either in general or by name. This is particularly the case among regular listeners.

⁶⁷ BBC Pulse survey, January 2009

"In general I think the DJs are in a league above any other station for entertainment value (with the odd exception) and I love that there are no adverts and when they do play new music that's really exciting to me."

Respondent to our public consultation question 'what makes Radio 1 different and stand out from other radio stations?', age unspecified.

As explained in the Introduction, we have not considered editorial compliance as part of this review. However, it is worth mentioning our duties in this area as it has some impact on audience perceptions of Radio 1. The nature of Radio 1's output – live, unscripted, personality-driven and designed to appeal primarily to young listeners – is such that it does not appeal to everyone's tastes. When the station breaches editorial guidelines, we treat these matters very seriously. We note, however, that the vast majority of Radio 1 output conforms to the BBC's editorial guidelines.

We believe that Radio 1's daytime speech output could be more ambitious in terms of delivering some of the BBC's public purposes

As well as monitoring Radio 1's music output, BBC management also commissions Intelligent Media to monitor Radio 1's speech output, with the aim of relating the speech to specific public purposes. While this is a subjective exercise, the analysis does suggest that most (around two-thirds) of presenter speech on Radio 1 serves the purpose to stimulate culture and creativity, generally falling under the broad headings 'cultural comment', 'listener interaction' and 'interviews'.

Beyond these broad classifications, however, very little of the speech on Radio 1 in daytime serves more tangible and specific parts of the culture and creativity purpose, by, for example, commenting on the music being played on the station, or serving the BBC's other public purposes. An average of just 10 minutes during daytime in the sampled weeks was allocated to the purpose to promote education and learning – although it is worth noting this would vary if different weeks were sampled, for example during a week where Radio 1 was running a major social action campaign.

Given its high usage among young people, and its strong brand identity, Radio 1 has a very high capability to deliver and promote important messages to young people and, during the course of this review, we have seen how effective presenters can be at achieving specific objectives, such as the fund-raising achieved for Comic Relief in March 2009.

While it is not realistic to expect such output on a daily basis, and we will not be prescriptive about what Radio 1's presenters talk about, we do think that more of Radio 1's presenter speech could have a clearer relationship to delivering the public purposes. We think that a positive first step in this direction is an increase in the volume and ambition of Radio 1's social action output (see paragraphs below).

Promoting education and learning

Radio 1's service licence requires the channel to make a significant contribution to this purpose through its social action output, a regular advice programme, its documentaries and its vocational initiatives.

Radio 1's *The Surgery* programme is effective at reaching a young audience

The Surgery is a regular advice programme broadcast on Sunday from 10pm until midnight. It offers information and advice on a range of issues relevant to young people, such as body image, sex, alcohol, and exams. The show reaches just over 250,000 listeners each week⁶⁸, around 60 per cent of whom are aged 15 to 29 and 25 per cent are 15 to 19, both considerably higher than for the station as a whole. Of those who responded to our public consultation question on this issue, most were positive about *The Surgery*, although there were some negative comments about specific aspects of the programme.

Radio 1 also runs a number of themed campaigns throughout the year. We support BBC management's aim to increase their impact

Radio 1 runs around three specific social action campaigns each year. The station's approach is to build these into existing schedules, including in daytime, rather than being specific built programmes. Recent campaigns have covered the effects of alcohol consumption, mental health and bullying. We support the approach Radio 1 has taken to campaigns, in particular using its presenters who have developed a relationship of trust and loyalty with their audience to deliver campaign messages represents a genuine commitment to delivering public purpose objectives. Radio 1 provides additional support and information online.

While we are unable to measure the reach and impact of these campaigns empirically, mainly because of the ways in which radio listening is measured (by quarter hour slots averaged across a three month period rather than by individual programmes on specific dates), responses to our public consultation for this review were largely positive about them, particularly among those at the younger end of Radio 1's target audience.

"Radio 1 does this well too. Last week was Careers Week, Alan Sugar was in to talk about careers – Someone that people would want to get advice from. Exam helpline is great too. Shows an awareness of your target audience and the needs of young people!"

Respondent to our public consultation question 'how well do you think Radio 1 keeps young people informed, and provides advice, on a range of issues relevant to young people?', aged 18 to 21

"Again this is covered mainly in the evenings and should be integrated more in the day shows at various intervals, to hit a wider audience"

Respondent to our public consultation question 'how well do you think Radio 1 keeps young people informed, and provides advice, on a range of issues relevant to young people?', aged 22 to 29

⁶⁸ RAJAR, 2008, 15 minute weekly reach

Evidence from BBC management's YouGov research suggests that the target audience rates Radio 1 fairly highly for its performance in 'dealing with issues that matter to young people', giving it an average score of 7.0 out of 10. However, it is not clear from this statement that those who were surveyed were thinking about social action campaigns when judging Radio 1's performance in this area.

In its submission to this review, BBC management highlighted an aim to 'develop social action into the core of Radio 1's offer' and increase its impact. This builds on evidence gathered from qualitative research undertaken for BBC management by Sparkler for this review, which found that audiences were often not aware of Radio 1's campaigns.

Action 8b

We support this objective as part of a wider strategic aim for Radio 1 to deliver a greater range of public purpose objectives through its speech output. We will strengthen Radio 1's service licence to reflect our expectations that Radio 1's speech output should do more to deliver a range of public purpose objectives, including ensuring a minimum number of social action campaigns each year.

We will work with BBC management to develop better ways of measuring the impact of its speech output in delivering the BBC's public purposes.

Radio 1 broadcasts a range of documentaries. Tactical scheduling of these may be the most effective way to use them, but makes assessment of their impact difficult.

In 2008-09 Radio 1 broadcast 43 documentaries against a service licence condition of at least 40 new documentaries each year.

These documentaries cover a range of cultural subject areas including youth culture, film, and music. As with social action campaigns, we are unable to measure the reach of Radio 1's documentaries as they are not broadcast in a regular slot. Qualitative research undertaken for this review by Sparkler⁶⁹, however, found that audiences had very low awareness of the documentaries on Radio 1. One organisation which responded to our public consultation suggested that Radio 1 should be required to broadcast a higher volume of documentaries. We have found no evidence during this review that increasing Radio 1's documentary quotas would increase its delivery of the public purposes to audiences – indeed, as described above, we believe that Radio 1's live speech can be the most effective way to promote the BBC's public purposes. We do, however, support BBC management's aim to increase the impact of its documentary output among younger audiences as part of a wider strategic aim for Radio 1 to deliver a greater range of public purpose objectives through its speech output.

⁶⁹ Research commissioned by BBC management. September 2008

Sustaining Citizenship and Civil Society

Radio 1's service licence requires the station to make a strong contribution to this purpose through its news and current affairs output.

Radio 1 broadcasts a significant volume of news during daytime, reaching a large number of young people and making a strong contribution to the promotion of the BBC's citizenship purpose.

Radio 1 has a service licence condition to 'broadcast at least 1 hour of news during daytime each weekday, including two extended bulletins'. This is fulfilled through bulletins every half hour during breakfast, and bulletins every hour during the rest of daytime, as well as two extended bulletins at 12:45 and 17:45 each weekday. The total news output on Radio 1 in daytime is 68 minutes each weekday, considerably higher than on commercial music radio stations that target a young audience, for example twice as much as on Capital and four times as much as on Galaxy.

In total, news on Radio 1 reaches some 11.4 million listeners each week, including 4.5 million 15 to 29 year olds⁷⁰. Around 4.7 million people listen to Radio 1's extended Newsbeat bulletins, of which 44 per cent are aged 15 to 29. Although we are unable to measure the number of listeners to news on Radio 1 who do not consume news elsewhere on the BBC, given the relatively high amount of unique reach to Radio 1, it is likely to be a significant number.

Two organisations which responded to our public consultation argued that Radio 1 should be required to broadcast an extended news bulletin during the breakfast show, where listening is highest. We have found no evidence, however, from our public consultation or from audience research, that there is audience demand for more news on Radio 1 (indeed some respondents to our consultation felt the news bulletins were too frequent). And in light of the volume of news provided by the BBC and others at that time on television and radio, we are satisfied that BBC management's current approach to delivering news on Radio 1 is appropriate and effective.

Listeners have generally positive views on the quality of Radio 1's news output

The audience has varying views on the general tone and 'gravity' of Radio 1's news output. The young people we spoke to as part of this review described *Newsbeat* as a concise and snappy way of getting information across to a young audience, which covered a good range of topics from international to entertainment news.⁷¹ Similarly, the majority of respondents to our public consultation, particularly those at the younger end of Radio 1's target age group, liked *Newsbeat*. At the older end however – among those aged 22 and over – some felt that the tone of Newsbeat was a little too simplistic.

"Good – sometimes they sound a little bit condescending – like as young people we might be a bit stupid, but in general very informative and interesting without ever being boring."

Respondent to our public consultation question 'what do you think of Radio 1's *Newsbeat* programmes and news bulletins?', aged 22 to 29

⁷⁰ RAJAR, 2008, 15 minute weekly reach

⁷¹ Events organised and run by the British Youth Council

BBC management's YouGov research shows that, whilst 15 to 29 year olds rate Radio 1 higher than comparable commercial radio stations for 'makes news and current affairs and other topical issues interesting to you' and 'provides high quality independent journalism', these scores were lower than for other purpose related statements, with Radio 1 scoring 6.1 and 5.7 out of 10 respectively. One possible explanation for these relatively low scores is that audiences do not tune in to Radio 1 specifically for its news output, and do not readily associate news with Radio 1 in the way they would, for example, with Radio 4.

Radio 1's news is well supported online

Radio 1's service licence states that its news output should be supported by a continuous online service. Radio 1 meets this through *Newsbeat* online, which in 2008 had around 425,000 unique users in the UK each week,⁷² assisted by prominent links from Radio 1's homepage. The *Newsbeat* online pages also provide prominent links to BBC News main online pages.

Representing the UK's nations, regions and communities

Radio 1's service licence requires the station to contribute to this purpose through its live music schedule as well as weekly 'opt-out' programmes for Scotland, Wales and Northern Ireland.

Radio 1's live music programme covers a range of events from across the UK

Radio 1's live event programmes cover a range of music events from across the UK. Most are based outside London and Radio 1 also locates its own live event, *Radio 1's Big Weekend*, outside London, choosing Preston, Dundee, Maidstone and Swindon in the past four years.

The main role of Radio 1's opt-outs for each nation is to promote new music from across the UK

Radio 1's service licence requires it to broadcast over 200 hours of opt out programming from Scotland, Wales and Northern Ireland each year.

These programmes are broadcast from each nation to those listening in each nation (and are available online to all across the UK). Radio 1's opt outs are part of the *BBC Introducing* strand, which primarily plays music from bands and artists from each nation between 12am and 2am every Thursday. The opt-outs have helped Radio 1 discover and develop new presenting talent for the station but reach is relatively low - below 100,000 listeners each week – due to the late timeslot.

Bringing the world to the UK

Radio 1's service licence requires the station to contribute to this purpose through playing music from artists around the world, providing a platform for British talent as well as coverage of world events in its news output.

Audiences think that Radio 1 delivers this purpose reasonably well

⁷² BBC server logs, 2008, weekly unique users

Radio 1 meets this purpose mainly through its music coverage, which includes songs from popular non-UK acts as well as occasional live events. BBC management's YouGov research showed that on the statement 'helps you know and understand about what is going on in the world', Radio 1 listeners aged 15 to 29 gave Radio 1 an average score of 6.2 out of 10, ahead of all comparable commercial radio stations.

Emerging communications

Radio 1's service licence states that the channel should promote this purpose through offering and supporting its content on a range of digital platforms, and encouraging the take up of DAB.

Usage of Radio 1's website is high, particularly among its target audience

Radio 1's website reaches around 900,000 unique users in the UK each week.⁷³ This represents around 40 per cent of the total number of users to the BBC's Audio & Music division sites; reach to Radio 1's website has grown by some 50 per cent since 2005. Much of the usage comes from young people - over half of those who use the website are aged between 16 and 24⁷⁴, compared with around one-third of actual listeners to Radio 1.

Users are positive about Radio 1's online activities

BBC management's YouGov research shows that audience perceptions that Radio 1 'uses the internet in interesting ways' are significantly higher than for comparable commercial radio stations, at 7.2 out of 10 compared with 6.1 out of 10 for the highest commercial station.

The BBC's main survey of quality perceptions shows that audience views of the quality of Radio 1's website are slightly below average compared with the websites of other BBC radio stations and BBC Online as a whole.⁷⁵ However, the vast majority of those that responded to our public consultation question about Radio 1's website were positive about it.

"Radio 1's website is clear, professional, modern and easy to use, and so are the podcasts"

Respondent to our public consultation question, 'what do you think about Radio 1's website and podcasts?', aged 13 to 17

Audiences consume Radio 1's output in a number of ways beyond the analogue radio station

Beyond the analogue station, audiences can listen to Radio 1 on DAB radio sets, through digital television, 'live' on the internet and on demand through the iPlayer, podcasts and third party websites such as YouTube. While these new platforms have not had the same

⁷³ BBC server logs, 2008, weekly unique users

⁷⁴ BBC Pulse survey, 2008

⁷⁵ NetPromoter survey

effect on radio listening⁷⁶ as they have had on television viewing (see Section 2.3) – analogue radio still accounts for over three quarters of live listening - they have presented new ways for audiences to access and use Radio 1, and are likely to become more important as the ways younger audience consume both music and radio change.

- Around one in five listeners to Radio 1 tune in digitally⁷⁷ (via a DAB radio set, digital TV or the internet), including around 1.4 million listeners via DAB. Radio 1 also occasionally broadcasts live events on television through the red button, with an estimated over 1 million people⁷⁸ watching some of its coverage of Radio 1's Big Weekend in 2009.
- There was an average 4.6 million hours of live streaming of Radio 1 content per month across 2008, the highest of any BBC radio station.
- The iPlayer enables audiences to catch up with broadcasts they previously missed – in the final quarter of 2008 there was an average of around 310,000 requests each week for Radio 1 content.
- There was an average of 450,000 requests from the UK for downloads of Radio 1 podcasts per week, across 2008 – representing more than 10 per cent of all BBC Radio podcasts. The most popular podcasts were highlights of *The Best of Chris Moyles* and *Scott Mills Daily*. Three one-off podcasts, featuring Kings of Leon, Coldplay and The Ting Tings, each attracted between 67,000-78,000 requests.

The ability of audiences to listen to Radio 1 output through these methods is reflected in the target audience's perception that Radio 1 'provides content and programmes in a variety of ways', which scored an average of 7.3 out of 10. The highest comparable commercial station scored 6.2

BBC management has identified its online and digital initiatives as a core part of Radio 1's forward strategy

BBC management's submission to this review outlines the ways in which Radio 1 aims to use digital and online platforms in the future to enhance its delivery of the public purposes and increase its focus on younger audiences. BBC management believes that, in the medium term, Radio 1's service licence may need amending to reflect better its digital activities beyond linear radio broadcasting. We believe that Radio 1's current service licence provides sufficient scope and clarity on its digital initiatives. However we recognize that over time, if BBC management proposes to develop Radio 1 in ways beyond those which are currently approved, we may need to review Radio 1's service licence to ensure it is fit for purpose.

3.4 VALUE FOR MONEY

Performance measures indicate that Radio 1 offers good value for money

Figure 17 provides a breakdown of Radio 1's service licence expenditure across the three most recent financial years. This has increased slightly over the three years but has remained well within the 10 per cent parameter around the agreed service licence budget, beyond which BBC management would need to ask for our approval for further expenditure.

⁷⁶ RAJAR only measures live listening, so on-demand listening is not included.

⁷⁷ RAJAR, October 2008 – December 2008, Base: Adults aged 15+

⁷⁸ BARB – estimated reach in digital homes, includes highlights of 2008 event

We think it is useful to provide some transparency over the allocation of Radio 1's service licence budget to different types of costs, as the annual budget of £32.5 million is often quoted by commercial radio operators as being very high. As Figure 17 shows, the costs incurred making Radio 1's programmes represent around half of the total spending against its service licence budget.

Other spending against the service licence budget comprises an allocation of centrally managed BBC costs – of which the vast majority relate to newsgathering and collecting society payments. Collecting society payments are allocated by the BBC across its various services based on BBC management's estimate of the amount incurred by each service. These costs are included in the service licence budget in order that the fullest or truest total cost of delivering each service to the audience can be calculated and value for money judgements made on this basis.

Figure 17: Radio 1 expenditure against service licence budget and other costs

£ millions	2006-07	2007-08	2008-09 ⁽³⁾
Costs incurred making Radio 1 programmes ⁽¹⁾	14.9	15.5	16.9
Central costs allocated to Radio 1 ⁽²⁾	15.9	16.0	16.2
Total service licence content spend	30.8	31.5	33.1
Service licence budget	30.4	31.3	31.3
Total service licence content spend	30.8	31.5	33.1
Distribution costs	3.9	4.2	3.5
Infrastructure/support	8.1	7.4	6.4
Total	42.8	43.1	43.0

(1) Programme costs include all direct costs of making programmes on Radio 1 except news: staff, studio, IT & other equipment, travel, commissioning and scheduling and commissioned programme costs.

(2) Central costs allocated to Radio 1 include the BBC's collecting society payments, newsgathering costs and central helpline costs.

(3) Subject to finalisation of 2008-09 financial statements

One organisation provided some confidential data to us as part of this review, which indicated Radio 1's programme budget is higher than some commercial radio stations. We have not benchmarked individual cost components as part of this review because the BBC is undertaking a separate piece of analysis looking at the value for money of all BBC radio stations, including the scope to compare costs between the BBC and commercial radio.

The BBC uses a measure called cost per user hour to assess value for money. This measure equates to the average cost incurred for every hour that a person listens to Radio 1. Combining Radio 1's high reach with its cost, means that Radio 1's value for money is very good, costing just 0.6 pence for every listening hour. This number has remained stable for several years. Because these cost per user hour metrics do not include all listening which is not-live, over time the BBC may need to review its approach to measuring the value for money of its radio stations.