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BBC Radio
Public Interest Test

20 November 2024



This research project explored audience reaction to the BBC's proposal to launch five new audio services

As part of the BBC's exploration of launching five new audio services on DAB+ and BBC Sounds, a **Public Interest Test (PIT)** was required to explore the appeal and impact of launching each, and all, of these.

This research project had the following objectives:

Overall

To get a robust and reliable view of what audiences perceive as the personal and public value of the proposed changes to BBC Radio

By testing this hypothesis

Extending the range of BBC Radio increases public value – especially for currently 'underserved' audiences.



Nostalgia



Anthems



Relax & escape



Dance



Sport

We tested the public value of the proposed services using a combination of quantitative and qualitative methodologies

STAGE 1 - QUALITATIVE METHODOLOGY

We conducted **18 x 2-hour online group discussions via Zoom** with a mix of different audiences to explore and compare reactions, from a personal and societal value perspective, to the five proposed new audio services.

In advance of attending the sessions, audiences completed a digital pre-task to reflect on their audio listening behaviours.

In the Zoom Groups, we explored the following:

- Exploring current listening behaviours
- Evaluations of BBC and Commercial Radio offer currently
- Reaction to the proposed new services (unbranded)
- Reaction to the proposed new services with BBC branding
- Personal, societal and behavioural impact of the proposed changes to the BBC Radio offer – and in the context of the BBC's Public Purposes

STAGE 2 - QUANTITATIVE METHODOLOGY

We ran a **20-minute online survey with 3000 Radio listeners** to understand the appeal, perceptions and impact of the potential new audio services. Respondents saw and answered questions about each proposed audio service.

Demographic data and weekly listening to BBC Radio has been weighted to RAJAR figures.

In the survey, we explored the following:

- Demographics and current listening behaviours
- Perceptions of BBC and Commercial Radio
- Reaction to the proposed new services (unbranded)
- Reaction to the proposed new services with BBC branding
- Personal, societal and behavioural impact of the proposed changes to the BBC Radio offer

The qualitative sample involved 18 x 2-hour digital group discussions across the UK with a carefully designed sample

18 x 2-HOUR ZOOM GROUPS

No.	Group type	Age	SEG
1	Heavy / mid-BBC Audio listeners	16-18	ABC1
2	Light/Non-BBC Audio listeners	16-18	C2DE
3	Heavy / mid-BBC Audio listeners	19-24	ABC1
4	Light/Non-BBC Audio listeners	19-24	C2DE
5	Light/Non-BBC Audio listeners	19-24	C2DE
6	Heavy / mid-BBC Audio listeners	25-34	ABC1
7	Heavy / mid-BBC Audio listeners	25-34	C2DE
8	Light/Non-BBC Audio listeners	25-34	ABC1
9	Light/Non-BBC Audio listeners	25-34	C2DE
10	Heavy / mid-BBC Audio listeners	35-54	ABC1
11	Heavy / mid-BBC Audio listeners	35-54	C2DE
12	Light/Non-BBC Audio listeners	35-54	ABC1
13	Light/Non-BBC Audio listeners	35-54	C2DE
14	Heavy / mid-BBC Audio listeners	55-64	ABC1
15	Heavy / mid-BBC Audio listeners	55-64	C2DE
16	Light/Non-BBC Audio listeners	55-64	ABC1
17	Heavy / mid-BBC Audio listeners	65+	ABC1
18	Light/Non-BBC Audio listeners	65+	C2DE

Demographic representation included:

- A mix of gender and ethnicity inclusive of Black, Asian, Minority Ethnic Audiences (hereafter referred to as B.A.M.E)
- A mix of lifestages, as relevant to the age of the session
- Inclusive of those who consider themselves to have a disability, long-term health condition or access needs
- A mix of urban / suburban and rural areas in each group
- A mix of those living in the Nations

Listening behaviours representation included:

- All listened to music Radio (mix of frequencies)
- Inclusive of speech Radio and/or podcast listeners (mix of frequencies)
- Mix of BBC and commercial Radio listeners (as relevant to group type)
- Representation of a range of stations, music and speech genres
- A mix of devices used to listen to Radio
- A mix of digital audio services used to listen to music and podcasts

Quantitatively, we spoke to a representative online sample of Radio listeners across the UK

As part of our survey, we spoke to **3,000 people across the UK**, representative of the population of radio listeners (i.e., anyone who reported that they ever listened to either speech or music radio). Fieldwork took place between 24th January and 1st February 2024.

We set quotas on gender, age, region, ethnicity, SEG and weekly listeners to BBC Radio to capture the audience spread and to accurately represent all listeners and currently underserved BBC Radio audiences.

We weighted data to RAJAR listening figures.

		Unweighted sample	Weighted sample	% of sample
BBC Radio listening frequency	Weekly BBC listeners	1,950	1,710	57%
	Non-BBC listeners	493	624	21%

We used two questions in the survey to determine weekly BBC Radio listeners. First, respondents had to listen to either music or speech radio weekly and then to BBC Radio stations (across all platforms) or BBC Sounds each week.

	Group	Unweighted sample	Weighted sample	% of sample
Gender	Male	1,428	1,432	48%
	Female	1,549	1,543	51%
	Non-binary	20	22	1%
Age	16-34	882	799	27%
	35-54	1,076	982	33%
	55+	1,042	1,219	41%
Region	Britain	2,457	2,450	82%
	Nations	543	550	18%
Ethnicity inclusive of Black, Asian Minority Ethnic Audiences (hereafter referred to as B.A.M.E)	White	2,646	2,674	89%
	Mixed/Multiple Ethnic groups	94	84	3%
	South Asian/Asian British	88	57	2%
	Black/African/Caribbean/Black British	118	96	3%
	Other ethnic group	43	78	3%
SEG	ABC1	1,680	1,713	57%
	C2DE	1,320	1,287	43%

For each proposed audio service, all respondents who took part in the research were shown the following descriptions

Nostalgia

- The best classic pop, primarily from the 50s, 60s and 70s
- Featuring artists like Abba, The Beatles, Stevie Wonder, Dusty Springfield, Elvis Presley, Elton John and the Rolling Stones
- Presenters known for their passion and expertise
- Telling the story of artists and tracks that shaped popular music

Anthems

- The biggest British and global hits from the 2000s to now
- A collection of anthems to boost your mood at any time of day
- Discover and re-discover iconic songs to sing out loud
- Featuring artists including Dua Lipa, Foals, Rihanna, The Killers, Stormzy, Taylor Swift

Relax & escape

- Soothing classical music, familiar and new
- To support your wellbeing and help you unwind
- A peaceful antidote to the stresses and strains of modern life

Dance

- High energy, mood-boosting mainstream dance music
- From classic dance anthems to hot, new tracks
- Featuring exclusive mixes and partnerships
- Brought to you by some of the UK's biggest DJs while supporting new and UK artists

Sport

- Live sport commentaries
- Featuring a broad range of sport (e.g. Football, Cricket, Boxing, Tennis, Rugby League, Rugby Union) from across the UK
- And sport podcasts with a range of debate, analysis and entertainment

What is covered in this report

1. How audiences feel about 'BBC Radio' today
2. Initial reactions to the proposed new audio services
3. Audience perceptions of the proposed new audio services
4. Impact on listening behaviours
5. a) Deep dive into each of the proposed new services
5. b) What difference could each of the proposed stations make to the BBC audio portfolio / offer?
6. Final thoughts

How audiences feel about 'BBC Radio' today



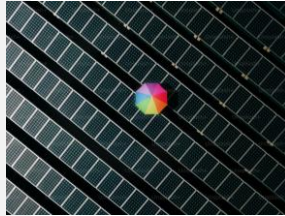
Despite a strong presence and heritage in Radio, audiences perceive the BBC is falling behind its commercial competitors



Quality broadcasting

There are strong associations between the BBC and producing **high-quality Radio**, in terms of production values and standards. Although primarily this view is among listeners, it's also evident among those not listening to BBC Radio.

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Eclectic coverage

Those more familiar with BBC Radio highlight its willingness to broadcast things **they might not hear on commercial Radio** (Radio 4 and Radio 6 highlighted in-particular).



Limited choice

Despite this, there's a sense the BBC Radio offer is more limited than what's available commercially. The vast volume of **genre/decade/descriptive** commercial stations is seen in contrast to **the limited amount of numbered stations on BBC Radio**



Less clear-cut

With a limited number of BBC stations (compared to commercial), the offer of each station is far broader than the likes of *Kisstory*, *Absolute 90s*, *00s* etc. This can lead to confusion around **exactly what listeners will get** from BBC stations.



Shifting market

A sense that the Radio market is increasingly **shifting away from the BBC** (the past) and to commercial (the future) due to **the number of new commercial stations emerging**. Compounded by **high-profile BBC presenter departures**



BBC falling behind

The BBC approach to naming its stations such as Radio 1, 2, 3, 4, 5, 6 (i.e. what do these numbers mean?) **increasingly feels out of date** and at odds with what listeners want and **how they choose stations** (genre, mood or moment-led).

Heavy/Mid BBC listeners hold a positive view of BBC Radio, but are also drawn to mood / genre-based offers elsewhere

They typically have a larger BBC repertoire and a greater awareness as to the full breadth of what's available through various BBC stations.

As a result, they don't identify as many gaps in what the BBC offers as less frequent listeners.

As regular listeners, they have a greater understanding of what to expect from Radio 1 vs. Radio 2, Radio 3 etc. and are more capable of matching their needs / moods to a particular BBC network.

For many, the more eclectic nature of the major networks (Radio 2 / Radio 4 and Radio 6 Music) in-particular are key to their appeal, as well as specialist stations like Asian Network offering something distinctive from what commercial Radio does.

However, there are moods / moments / situations where many don't feel the BBC meets their needs and they turn to commercial Radio



When looking to achieve a **specific mood** e.g. relaxed, uplifted or nostalgic



Or when wanting to listen to music from **a particular era** e.g. 70s / 80s / 90s



When in the mood for a **lighter tone or a more entertainment-driven** Radio show e.g. phone-ins, prizes

“ I've rediscovered Magic. I know it's been around for years, but in my car sometimes if I'm stuck in traffic, I'll swizzle and see what I can find. And **I've rediscovered Magic and Magic Chilled** and Magic FM I quite like. It's **my kind of era**. It's **easy listening music**.

Heavy/Mid, 55-64, C2DE

“ You've got **Absolute 00s and Absolute 10s** as well

Heavy/Mid, 35-54, ABC1

“ I listen to Heart Radio a lot as well... because you get regular news bulletins, which I like, but not long bulletins, and **upbeat, nice music**

Heavy/Mid, 55-64, ABC1

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NB: Heavy listeners are listening to at least one BBC Radio station 'most days - everyday' / Mid-listeners are listening 'once a week - every few weeks'

Light/Non-BBC listeners struggle to find ‘a way in’ to BBC Radio and see commercial Radio as more willing to take risks

Light/Non listener hold a more ‘mystified’ view of BBC Radio and many feel a lack of clarity around what is available and its relevance to them

This is driven by a lack of understanding of what Radio 1, 2, 3 etc. mean in terms of genre / style as well as any awareness of what is available on Sounds.

This lack of clarity around what different BBC Radio stations offer negatively impacts on their desire to explore or trial stations.

This sits in stark contrast to what they experience with their commercial Radio stations, where the music / mood promise is typically central in the station name.

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Those with experience of listening to BBC networks also flag that the experience is far less consistent than commercial Radio



Felt to be the most mainstream BBC station, a perceived focus on maintaining a broad appeal can limit the stations suitability for specific moments / moods. **Tracks can swing from one genre to the other, or one era to another and feels less coherent than commercial stations**



A lack of clarity around exactly what kind of music experience listeners will get when they tune in i.e. it varies from **mainstream music to current affairs and to blues in the evening**



Typically compared against Classic FM as the ‘other’ classical music radio station. **Radio 3 is viewed as the more ‘specialist’ of the two and less accessible than Classic FM**



Compared primarily against TalkSPORT*, 5Live’s mix of sports coverage alongside news, politics and current affairs makes it **less of a guarantee (than TalkSPORT) for listeners whose interest is driven primarily by sport**

NB: Light listeners are listening to at least one BBC Radio station ‘at least once a month – less than once a month’ / Non-listeners do not listen to any BBC Radio stations

*The sample was inclusive of sports radio listeners (rather than news radio) hence why consideration of 5 Live was primarily through a sporting lens

Light/Non-BBC listeners struggle to find ‘a way in’ to BBC Radio and see commercial Radio as more willing to take risks



*Commercial radio stations can be more specific To either an area or a genre, whereas **Radio 1 feels a bit more like they've got rules to stick to, almost, and they can't go outside of those***

Light/Non, 25-34, ABC1



*They'll play a song from 2010 and then they'll put a brand new one in, like literally right next to it. **And then you jump from genre to era with no flow***

Light/Non, 35-54, ABC1



*I don't put on Radio 3 because I'm never sure if it's on or not, because of all the long silences. **With Classic FM, there's always something going on***

Light/Non, 55-64, ABC1



*On 5 live you can tell they **have more rules than TalkSPORT**, on commercial channels you can tell they're just having normal chats, not holding back as much*

Light/Non, 19-24, C2DE

Audience's views on the need for the proposed services are influenced by their knowledge of the UK radio landscape

01

Listeners' **knowledge and understanding of the radio landscape is typically limited to the stations they currently listen to** as well as those they may have listened to in the past

02

When introduced to the 'radio landscape' i.e. what is available on BBC and commercial radio, **many are surprised by the scale and range of what is available**

03

The number of commercial stations available surprises many and helps them to understand why the BBC might be considering these proposals (especially when seeing the BBC Radio portfolio 1, 2, 3 etc.)

04

That many are unaware of the existence of most of these stations suggests that **there is a role and an opportunity for the BBC to proceed with the proposed stations** and use the BBC brand to drive awareness and interest

“ *I didn't even know there was that many stations, but I guess it's all personal preference isn't it*
Light/Non, 35-54, C2DE

“ *Seeing it on paper now, I stick with a lot of the same things. So I wouldn't have known about a lot of these if they weren't listed in front of me*

Perceptions of BBC Radio are increasingly influenced by the ‘BBC baggage’, much of which exists outside of Radio

Licence fee frustrations

Mixed opinions towards the BBC’s funding via licence fee (and misunderstanding of what the licence fee funds e.g. radio) can negatively impact perceptions of the BBC across all channels (and views on any additional BBC expansion)

Political ideology

Those who feel the BBC’s political leanings are at odds with their own tend to have more heightened criticism of the organisation and any potential uses of licence fee money, despite awareness of the financial pressures on the BBC

Negative press

Critical stories of the BBC in the press as well as negativity towards salaries for BBC talent can also colour perceptions of any BBC endeavours, including in Radio



*My opinion of the licence fee is **while I’m happy with what I get out of BBC Radio, I’m very unhappy with what I get out of BBC TV***

Heavy/Mid, 55-64, ABC1



*Sometimes **I would question how impartial** they are*

Heavy/Mid, 65+, ABC1



*Television and the news has **a lot more bias** and negative associations*

Heavy/Mid, 65+, ABC1

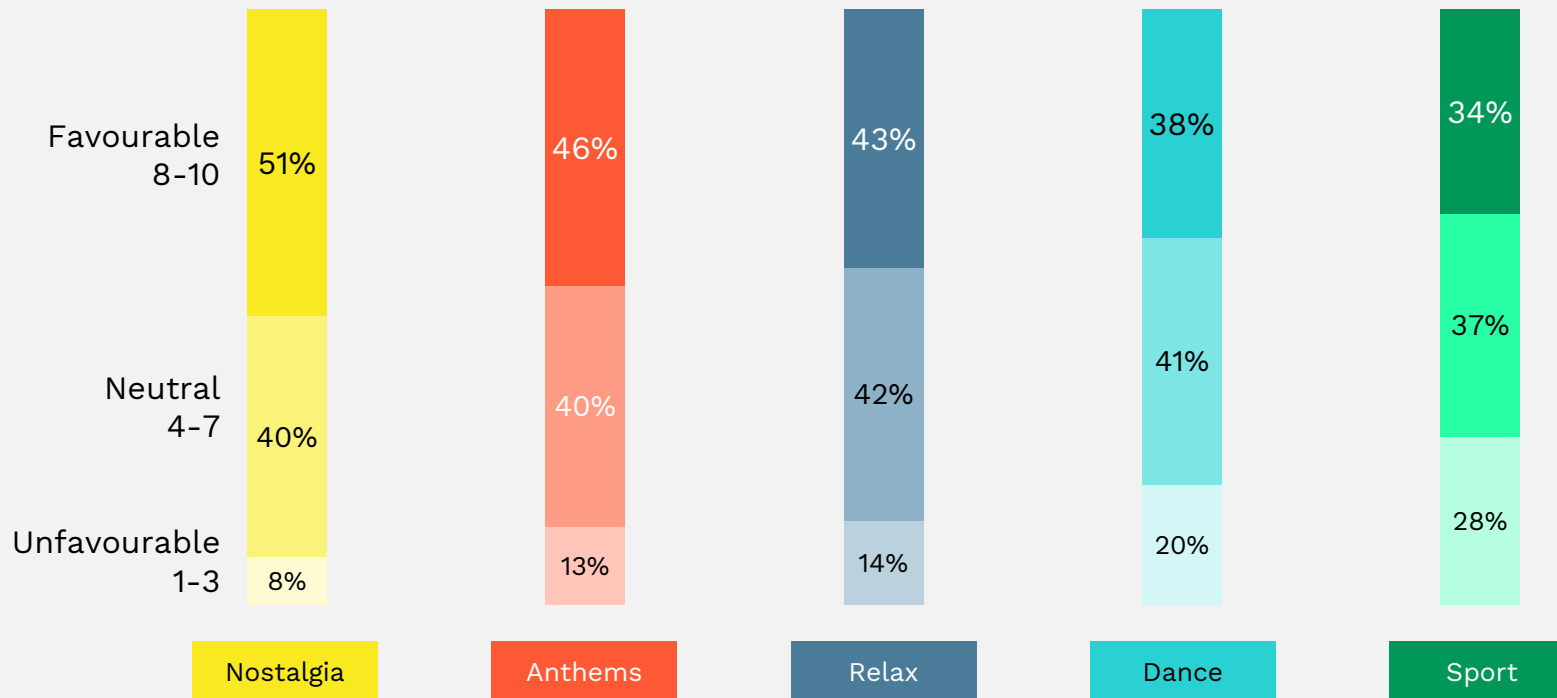


Initial reactions to the proposed new audio services



Initially, we showed the proposed audio services unbranded, and among all listeners there was a mixed response

ALL LISTENERS: How appealing does this service sound? (unbranded)



Nostalgia

“Those genres, those eras don’t really appeal to me...but **the presenters known for their passion and expertise and all of that stuff definitely appeals**”

Light/Non, 35-54, ABC1

Sport

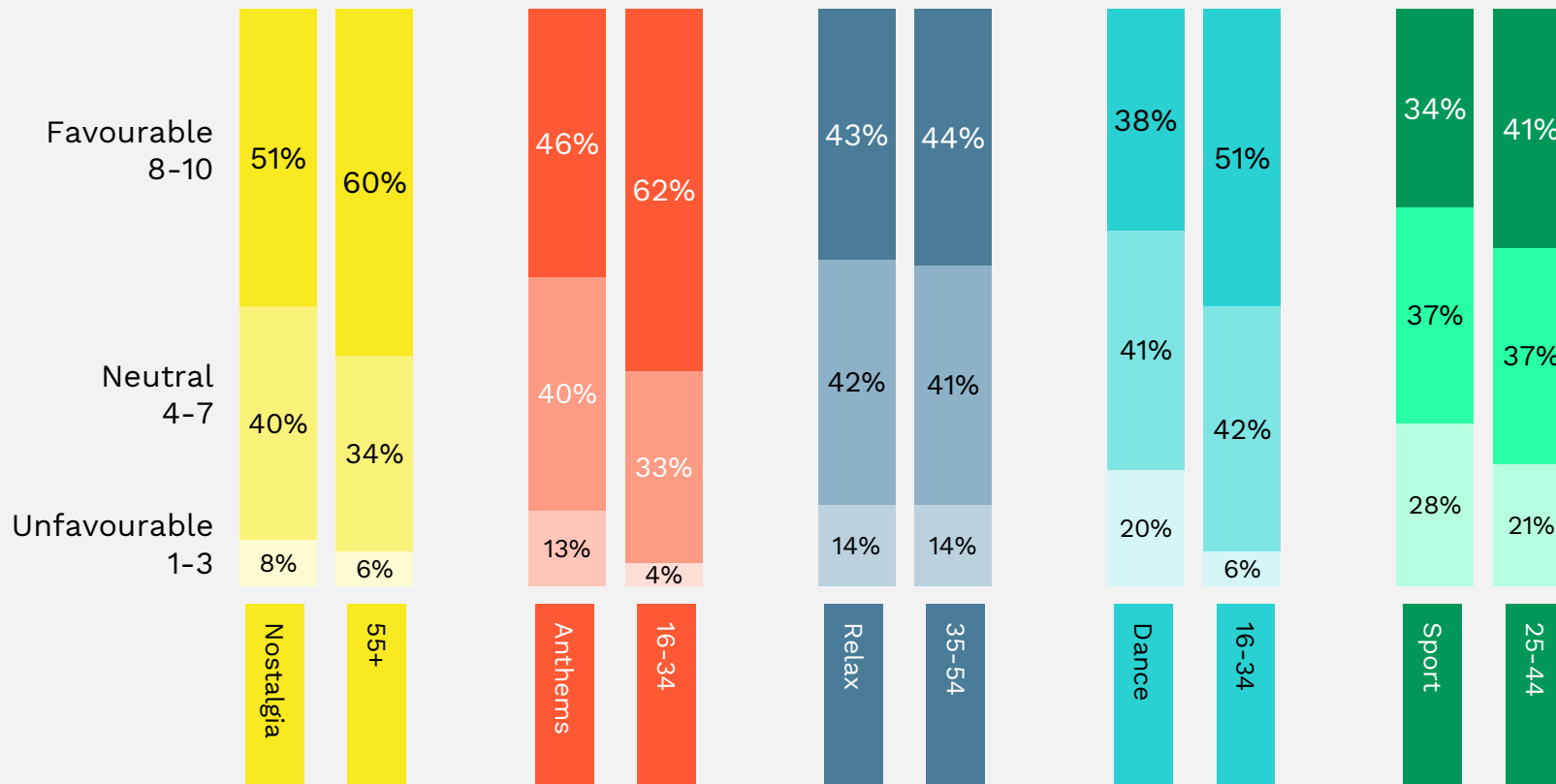
“I’m a **big sports fan**, always have been, **but it very much depends on the quality of delivery, the knowledge of presenters and the range of sports.**”

I think the broad range of sports is really important, delivered by people who know what they’re talking about

Heavy/Mid, 55-64, C2DE

Among target audiences we see good appeal scores for Nostalgia, Anthems and Dance

ALL LISTENERS / TARGET AUDIENCES: How appealing does this service sound? (unbranded)



Nostalgia

“ I would **definitely listen to this**. This is right up my street. I think there's **something for everybody**. And I'm a Beatles fan, so I would be very interested in any **story** about the Beatles. Even Dusty Springfield, who died quite young, really... (if there is) someone who is **passionate** about them and they **know what they're talking about**. Yeah, put me down for this station.

Heavy/Mid, 65+, ABC1

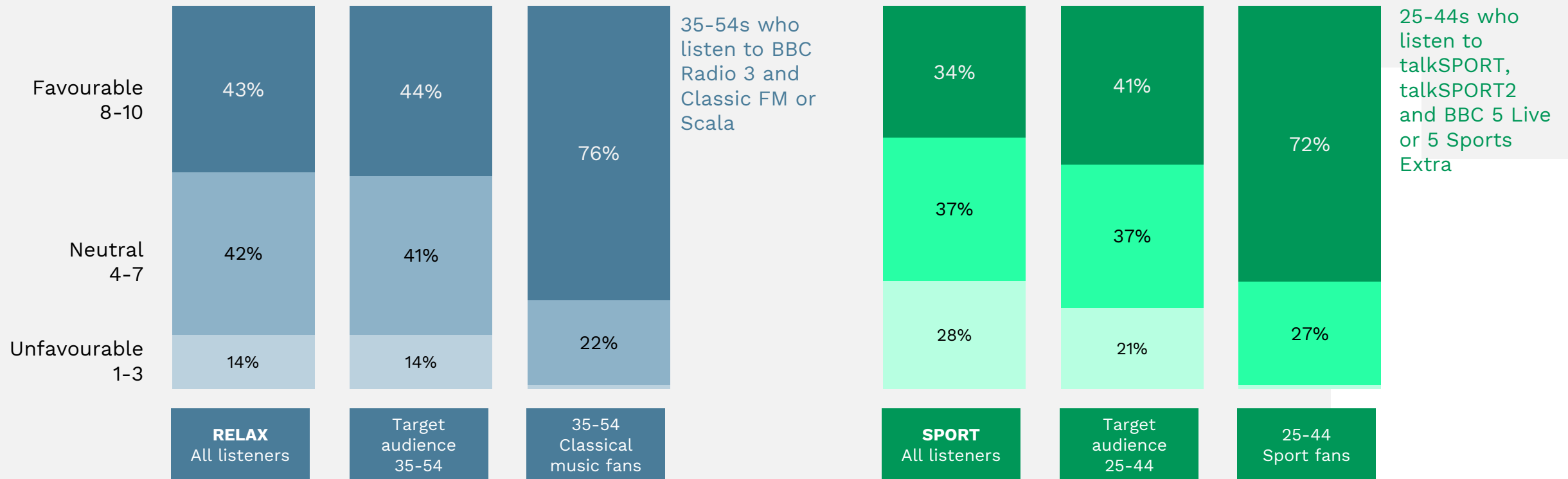
Anthems

“ It's literally, me in a Radio station!.. So the fact that it will have everything in there and it also has your kind of stuff that I grew up listening to as well as the modern day stuff, for me, **that's a perfect package** for what I'd want to listen to on the Radio. I'm literally **flipping around all these different genres** anyway. **So I'd have it all in one**.

Light/Non, 25-34, ABC1

Fans of classical music and sport find the new services very appealing

ALL LISTENERS / TARGET AUDIENCES: How appealing does this service sound? (unbranded)



All services except for Relax are significantly more popular among their target audience

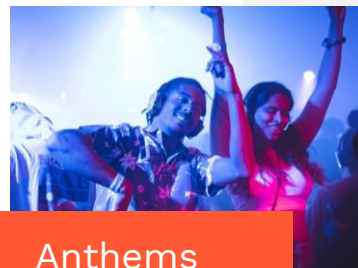
ALL LISTENERS: How appealing does this service sound? (unbranded)



Nostalgia

51% favourable

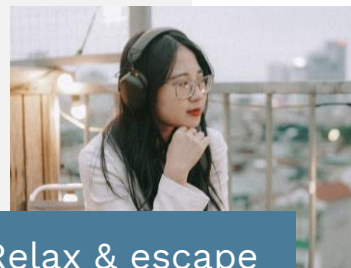
Age 16-34 = 45% ↓
 35-54 = 46% ↓
 55+ = 60% ↑



Anthems

46% favourable

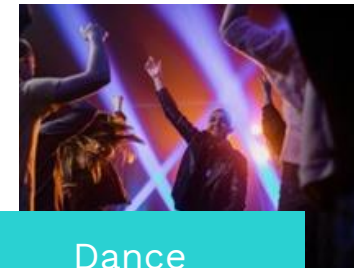
Age 16-34 = 62% ↑
 35-54 = 55% ↑
 55+ = 29% ↓



Relax & escape

43% favourable

Age 16-34 = 46%
 35-54 = 44%
 55+ = 40% ↓



Dance

38% favourable

Age 16-34 = 51% ↑
 35-54 = 48%
 55+ = 23% ↓



Sport

34% favourable

Age 16-34 = 40% ↑
 25-44 = 41% ↑
 35-54 = 38%
 55+ = 28% ↓

Among underserved audiences (within the target age), Relax and Sport are more appealing to B.A.M.E audiences

TARGET AUDIENCES: How appealing does this service sound? (unbranded)



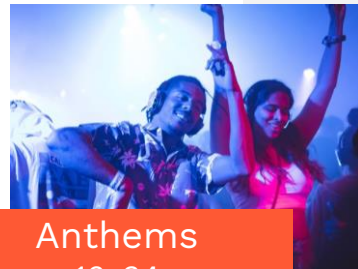
Nostalgia
55+

60% favourable

- C2DE = 63%
- B.A.M.E = low base
- Nations = 62%
- Non-BBC listeners = 58%

Competitor Listeners* = 69% ↑

*Greatest Hits Radio, Absolute 60s/70s, Heart 70s, Boom Radio



Anthems
16-34

62% favourable

- C2DE = 60%
- B.A.M.E = 59%
- Nations = 60%
- Non-BBC listeners = 60%

Competitor Listeners* = 68% ↑

*Hits Radio, Virgin Anthems Radio, Absolute 00s/10s



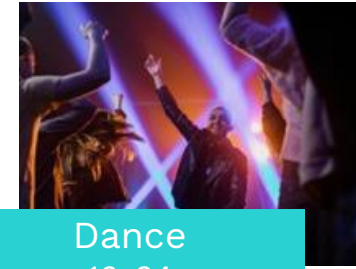
Relax & escape
35-54

44% favourable

- C2DE = 41%
- B.A.M.E = 57%** ↑
- Nations = 34% ↓
- Non-BBC listeners = 33% ↓

Competitor Listeners = 66% ↑

*Classic FM, Scala, Smooth Chill, Virgin Chill, Magic Chill



Dance
16-34

51% favourable

- C2DE = 48%
- B.A.M.E = 52%
- Nations = 45%
- Non-BBC listeners = 47%

Competitor Listeners = 62% ↑

*Capital Dance and Heart Dance



Sport
25-44

41% favourable

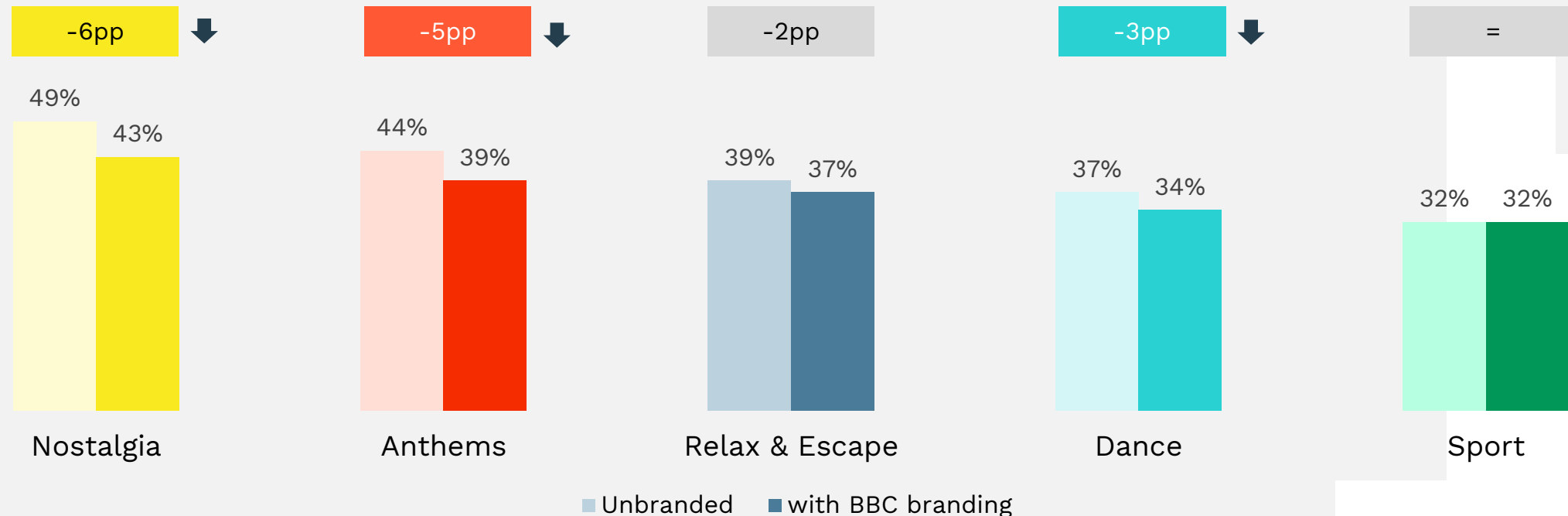
- C2DE = 40%
- B.A.M.E = 48%**
- Nations = 41%
- Non-BBC listeners = 16% ↓

Competitor Listeners = 69% ↑

*talkSPORT/talkSPORT2

BBC branding does not lead to higher consideration scores; however, among all listeners, the scores are generally positive

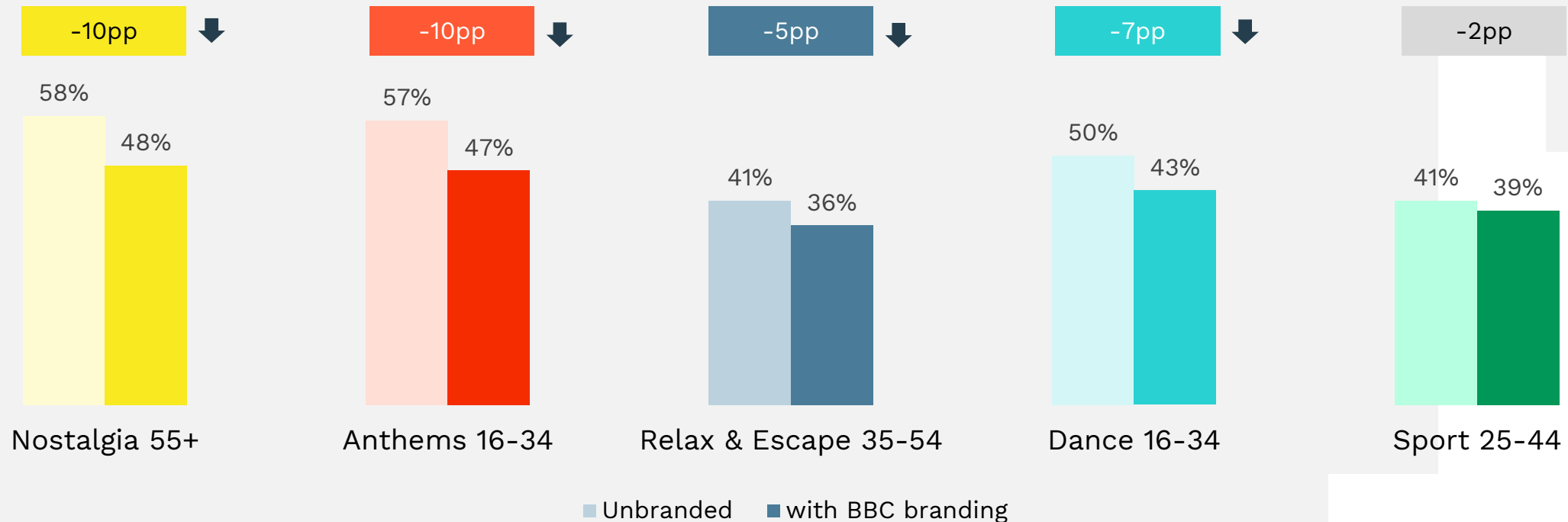
ALL LISTENERS: Likelihood to listen to new services (unbranded vs. with BBC branding)
 % likely to consider listening (8-10 on a 10-point scale) – significant changes highlighted in relevant colour



* As a comparison from BBC Three PIT in 2022: 41% likely to watch a BBC Three TV channel, and 53% between 16–34-year-olds (asked on a 5-point scale)

The same branding effect is true for target audiences, but even so we see good scores for Nostalgia, Anthems and Dance

TARGET AUDIENCES: Likelihood to listen to new services (unbranded vs. with BBC branding)
 % likely to consider listening (8-10 on a 10-point scale) – significant changes highlighted in relevant colour

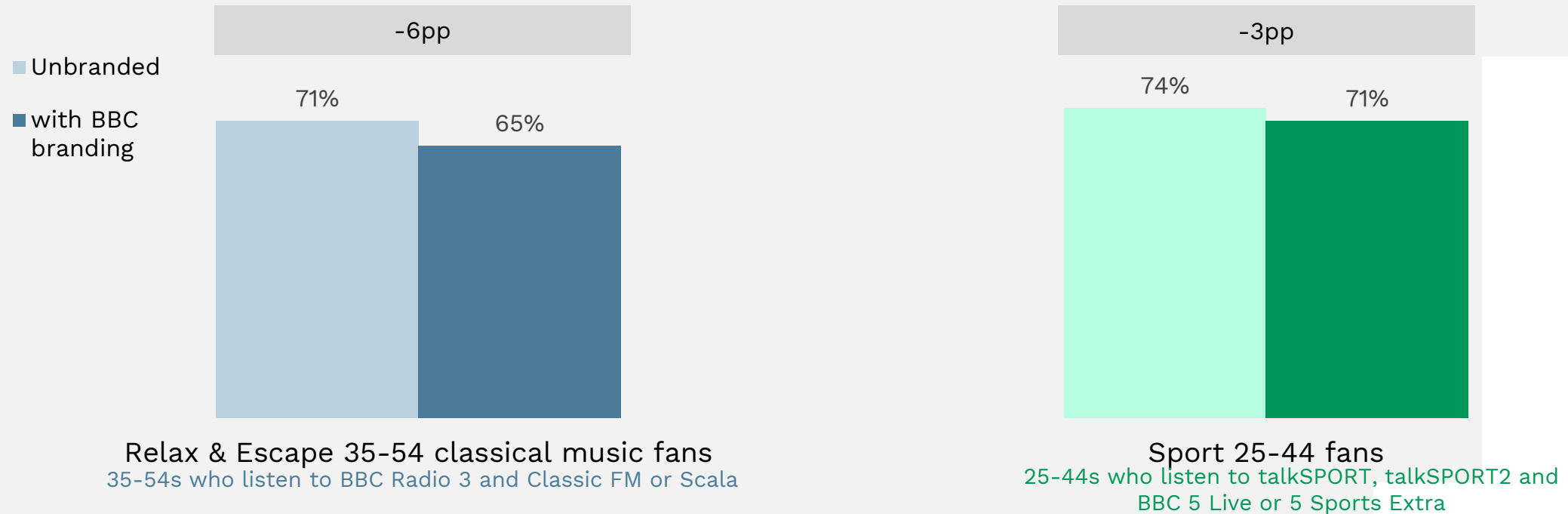


* As a comparison from BBC Three PIT in 2022: 41% likely to watch a BBC Three TV channel, and 50% between 16–24-year-olds (asked on a 5-point scale)

Among fans of classical music and sport we see very good likelihood to listen scores, with no significant branding effect

TARGET AUDIENCES: Likelihood to listen to new services (unbranded vs. with BBC branding)

% likely to consider listening (8-10 on a 10-point scale) – significant changes highlighted in relevant colour



* As a comparison from BBC Three PIT in 2022: 41% likely to watch a BBC Three TV channel, and 50% between 16-24-year-olds (asked on a 5-point scale)

Qualitatively, revealing the BBC is behind the ideas doesn't dampen enthusiasm and typically is seen as a positive move



*I think **they all sound really good**. And I think in **each of the offerings there was something different to what's already out there**. So I think that's positive. And, yeah, I think it would **probably be good for the BBC**, but similarly, to have more diverse Radio stations would also **benefit the public***

Light/Non, 19-24, C2DE

There is some initial surprise (among both heavy/mid and light/non listeners) when the BBC is revealed, as the move represents a shift from the BBC's current approach to Radio.

However, **audiences typically understand and appreciate why the BBC is considering the move** and the potential value that they could add to their personal Radio repertoires.

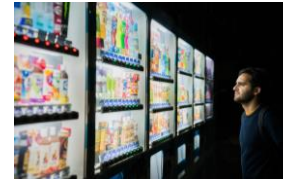
Heavy/Mid listeners don't lose anything because of the new stations and are typically more pro-BBC and keen to see it grow and succeed.

Light/Non listeners acknowledge this as a positive step from the BBC, attempting to offer additional value and more options to listen to.



Adapting the BBC offer to modern tastes

Audiences see the move as the BBC recognising and reacting to a change in listeners tastes (wanting greater choice and ability to match their mood to very specific Radio stations).



Diversifying what the BBC offers

More broadly, the move helps to diversify what the BBC offers in Radio, offering new and different ways into the BBC Radio offer and helping to plug some of the identified gaps in the existing portfolio.



Aligned to existing BBC Radio strengths

The stations on offer are close enough aligned to positive BBC Radio perceptions (e.g. knowledge, sport, emerging talent) to not feel like a stretch but instead a natural expansion for the BBC.



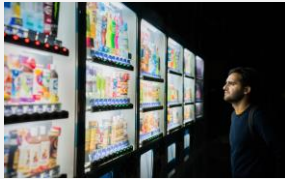
A distinct 'BBC' take on the stations

Those same positive perceptions of BBC Radio suggest that these stations will have a distinct take to them and will avoid 'treading on the toes' of existing stations.

Audiences understand why the BBC is considering the proposals and are intrigued by how they will be executed



Adapting the BBC offer to modern tastes =
Parity with market and increased relevance



Diversifying what the BBC offers =
Easier to find new genres/content from the BBC
Providing something different from what the BBC offers now



Aligned to existing BBC Radio strengths =
Easier to find new genres/content from the BBC



A distinct 'BBC' take on the stations =
What the BBC can uniquely add

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“ *The model that the BBC had before may have worked in years gone by, but it's certainly not keeping up with what's on offer currently. So it's a good thing*

Heavy/Mid, 35-54, C2DE

“ *They're saying 'if certain people are missing out currently on the BBC, then we'll offer these extra stations' which is a good thing*

Light/Non, 25-34, C2DE

“ *I think the BBC probably do all of those things anyways, but they're all mixed up at different times and on different stations*

Light/Non, 55-64, ABC1

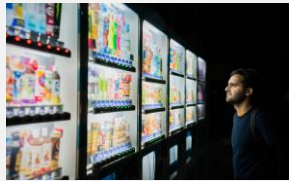
“ *Passion, in any sphere is good, isn't it? It's a good thing and expertise. **If someone knows what they're talking about, you find them riveting. I like good storytellers.** That's what I bought into.*

Heavy/Mid, 35-54, C2DE

The different proposed stations offer something both individually and collectively across these themes



Adapting the BBC offer to modern tastes



Diversifying what the BBC offers

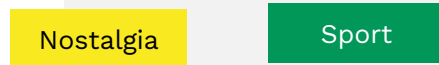
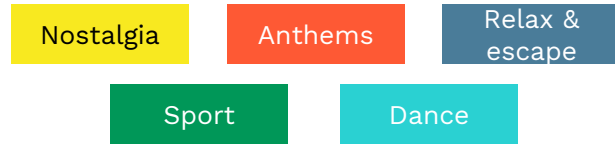


Aligned to existing BBC Radio strengths



A distinct 'BBC' take on the stations

Which of the new proposals?



All five proposed services help the BBC to gain parity with the market and be more relevant to modern day listening e.g. mood (**Nostalgia, Anthems, Relax**), genre (**Dance**), subject (**Sport**). The current BBC portfolio is less immediately clear on delivering against these requirements – especially for lighter/non listeners.

Anthems helps the BBC to maintain relevancy in the perceived gap between R1 and R2, **Relax** extends the BBC offer into a different new area in wellbeing, whilst **Dance** expands a lesser-known Sounds stream into a full station, making it more accessible for lighter/non listeners to discover.

Sport and **Dance** build on existing BBC credibility in these spaces, feeling like a logical extension of the current offer and making these genres easier to find than currently. They also offer more to listeners via a wider range of sports and a dedicated destination for dance tracks new and old.

Relax ties into the BBC's PSB remit, in communicating the benefits of wellbeing to the UK public. Whereas the BBC's established heritage in the **Dance** music scene will help that station feel distinctive. **Nostalgia** will benefit from the BBC's knowledge and experience in storytelling, with similar sentiments for the BBC's coverage of (different) sports for the **Sport** proposal.

There are, however, some more critical considerations over the extent to which the stations will develop the market



Some of these feel quite familiar

Some felt the proposed ideas were similar to what is already available e.g. Sport (TalkSPORT), Anthems (Heart 00s), Dance with R1's own dance slots and so there needs to be clear differentiation to these.



The possible tone of the coverage

Audiences were also unsure if some of the BBC style of coverage might feel a bit formal or less 'fun'. Or could be condescending / 'preachy' e.g. *Relax & escape* and pushing wellbeing onto people.



New artists and talent both positive and negative

Whilst beneficial that some of these new stations will help to break new talent in terms of presenters and artists, some concern that this may dampen the quality of production or content as a result.



Will the BBC be restrained in what they can do

A minority raised concerns that the BBC will be limited in the content that they can cover or discuss vs. some commercial operators (e.g. the Sport idea vs. TalkSPORT, or what stories Nostalgia could cover).



*I suppose **they don't laugh**, if you know what I mean. It's all very conversational and it's not humanised.*

*Whereas **other stations, they have fun parts**, fun segments, or even when they're chatting, they laugh and their tones go up and down. Whereas I feel **the BBC is all very straight**.*

Light/Non, 35-54, C2DE

Whilst the reception was broadly positive – and an expectation / reassurance that the BBC being behind the ideas meant that quality standards would be upheld – there were some reservations

Light/Non listeners, who tend to prefer commercial audio, wanted to **understand more about what made these different to some similar stations they listened to**. They also wanted to be reassured that the new stations would not include a more formal BBC style that they can find off-putting. And that these would be open to different voices and opinions instead of feeling restricted.

All listeners welcomed the idea of supporting new talent, but also hoped that there would be some experienced hands to help ensure production was of a high standard.

Audiences query how unique some of the proposed stations are and how they will be delivered by the BBC



Some of these feel quite familiar

“ I don't feel like it's a unique idea, **you could probably come up with one or two pre-existing stations that fit the explanations of the new ones**

Light/Non, 25-34, C2DE



The possible tone of the coverage

“ I would be **concerned if it did go down the same route as Radio 2**, with the banality of the presenters and their constant dribble

Heavy/Mid, 55-64, C2DE



New artists and talent both positive and negative

“ I suppose I might ask who would do it, who is presenting these. **So for classical I want someone who's experienced and is passionate about it**

Light/Non, 35-54, C2DE



Will the BBC be restrained in what they can do

“ I think this is the limitation of the likes of BBC doing a sports kind of station...they're going to want to be sure that **everything is kept correct, and everybody's kept happy and they're not upsetting anybody**

Light/Non, 25-34, C2DE

Audience perceptions of the proposed new audio services

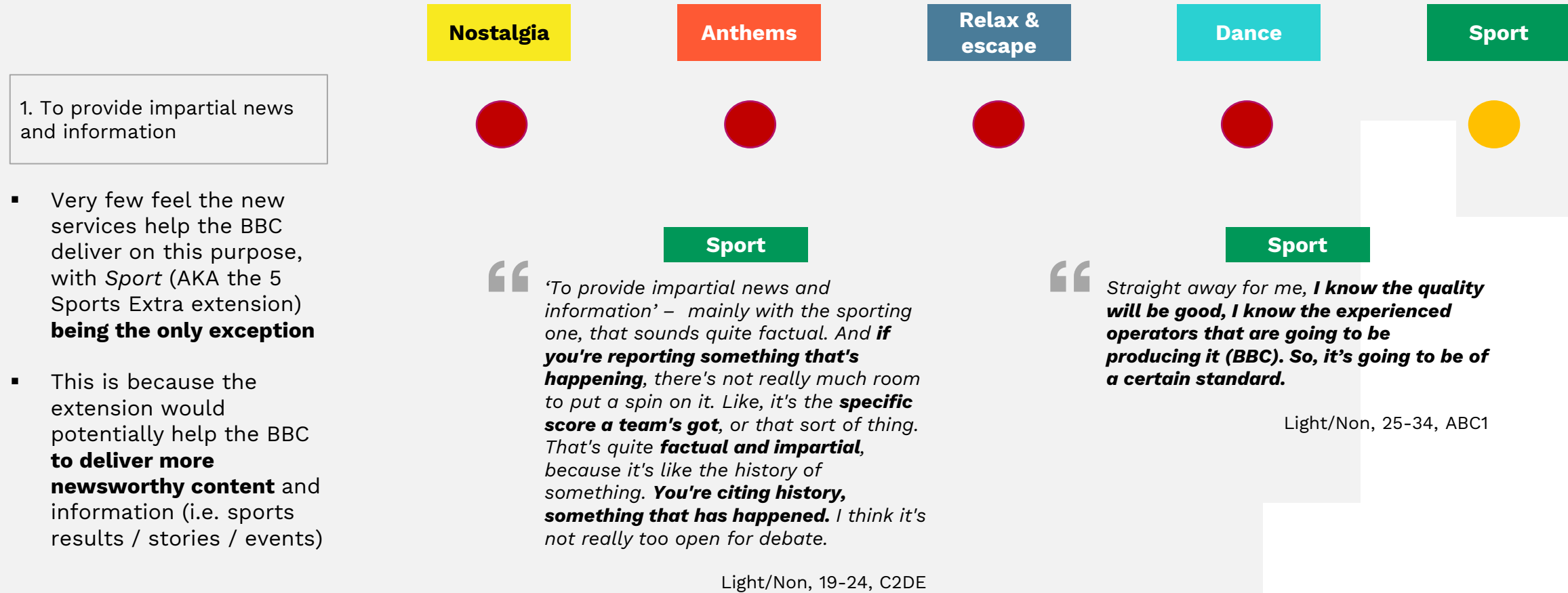


The five services are felt to best deliver on two of the public purposes overall, with mixed views on the others

PUBLIC PURPOSES

	Nostalgia	Anthems	Relax & escape	Dance	Sport
1. To provide impartial news and information	●	●	●	●	●
2. To support learning for everyone	●	●	●	●	●
3. To be creative and distinctive, whilst delivering high quality	●	●	●	●	●
4. To reflect, represent and serve everyone in the UK	●	●	●	●	●

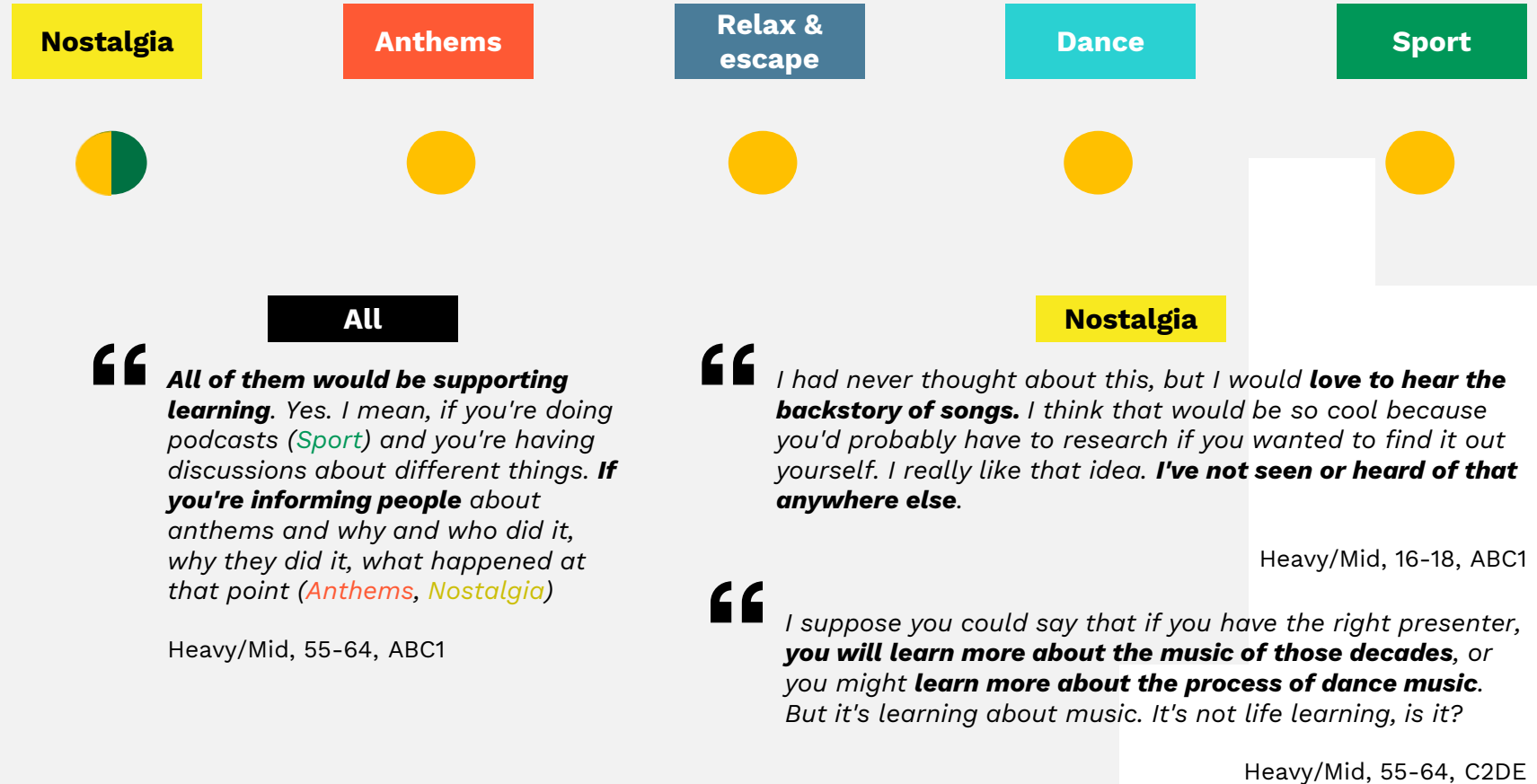
By providing additional newsworthy content the Sport service is the only one which delivers on impartial news and info



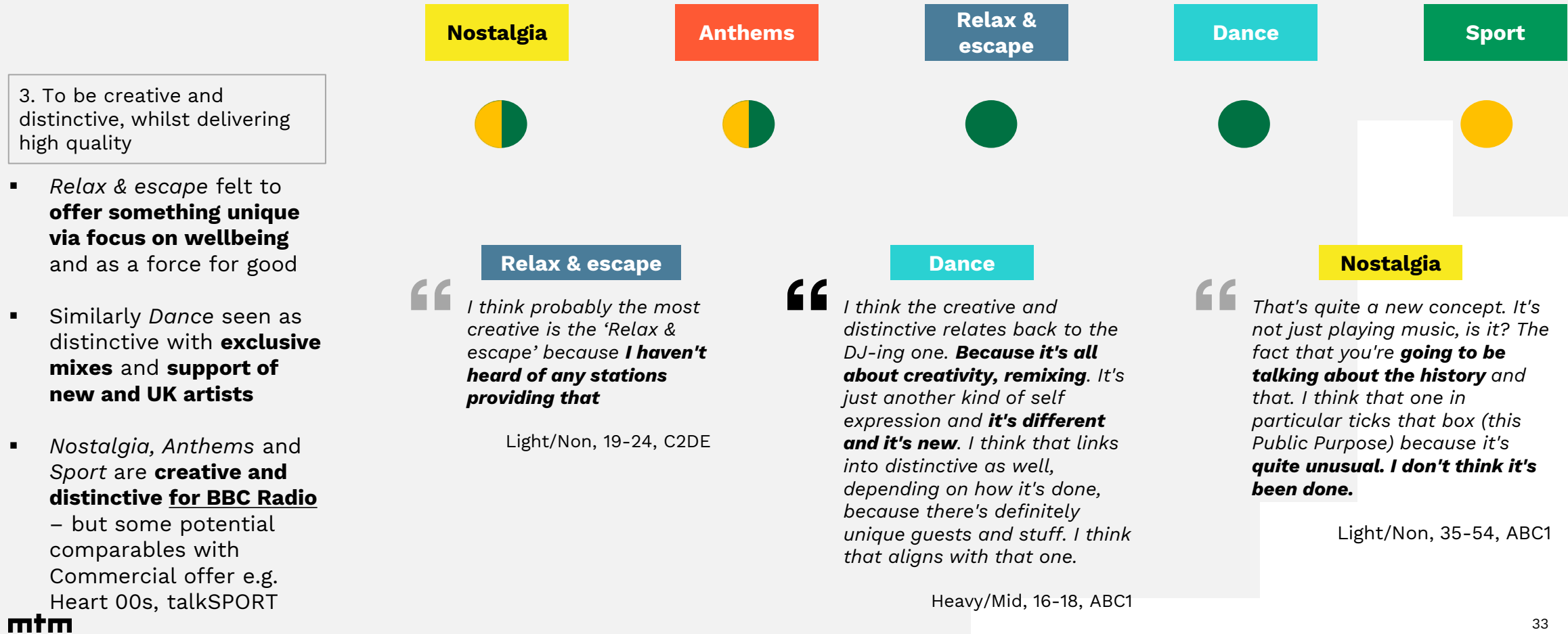
All services will help audiences to learn something new to some extent – but *Nostalgia* has more of a focus on this

2. To support learning for everyone

- *Nostalgia* references “**Telling the story of artists and tracks...**” in its description, which audiences cite as a reason for how it delivers more on this purpose
- Other services also help support learning to some degree (e.g. around wellbeing, new/old music, sports events and info) – but **less so in the traditional sense of ‘learning’** (i.e. education)



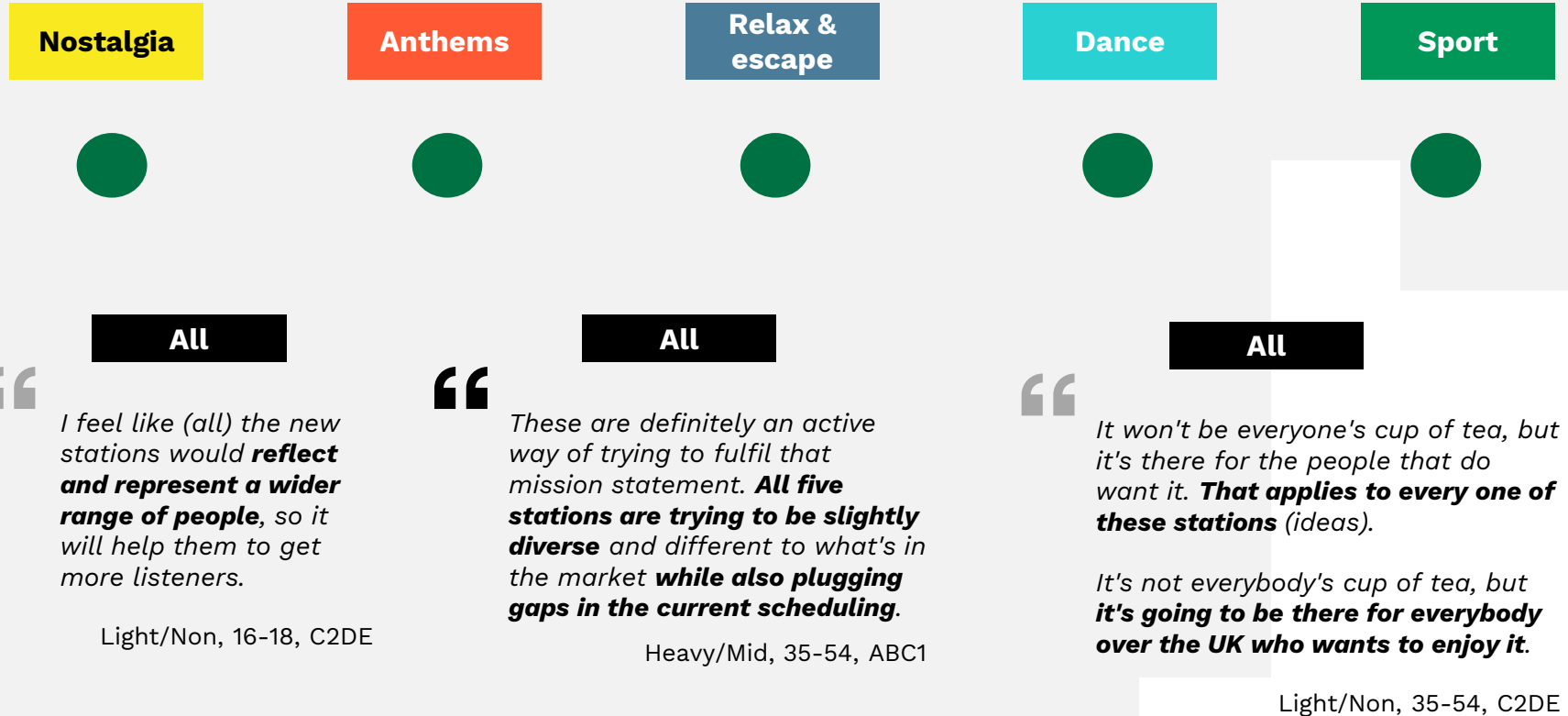
Majority of the new services are felt to be creative and high quality, although some seen as more distinctive than others



All station ideas are felt to be helping the BBC to reflect, represent and serve all UK audiences

4. To reflect, represent and serve everyone in the UK

- **All proposed services** - individually and collectively - felt to aid the BBC in delivering this
- Plugs identified '**gaps**' in current BBC Radio provision (e.g. *Anthems, Dance, Nostalgia*)
- Showcases **new talent** and **different backgrounds, interests** (e.g. *Dance, Relax & escape, Sport*)



This is a perspective supported by the quant, especially for providing high-quality services which cater for all listeners

TARGET AUDIENCES: BBC Radio perceptions % net agree on a 5-point scale (full details in the deep dive section)

	Nostalgia 55+	Anthems 16-34	Relax 35-54	Dance 16-34	Sport 25-44
Offers a high-quality audio service	71%	60%	62%	62%	58%
Caters for listeners across the UK	71%	63%	58%	59%	58%
Caters for the part of the UK I live in	66%	57%	54%	57%	54%
Is relevant to me	66%	57%	51%	56%	50%
Offers something different from the rest of BBC Radio	62%	55%	57%	56%	51%
Offers a creative take on this type of content	61%	56%	56%	55%	53%
Offers something different from what commercial radio currently offers	56%	54%	57%	54%	53%

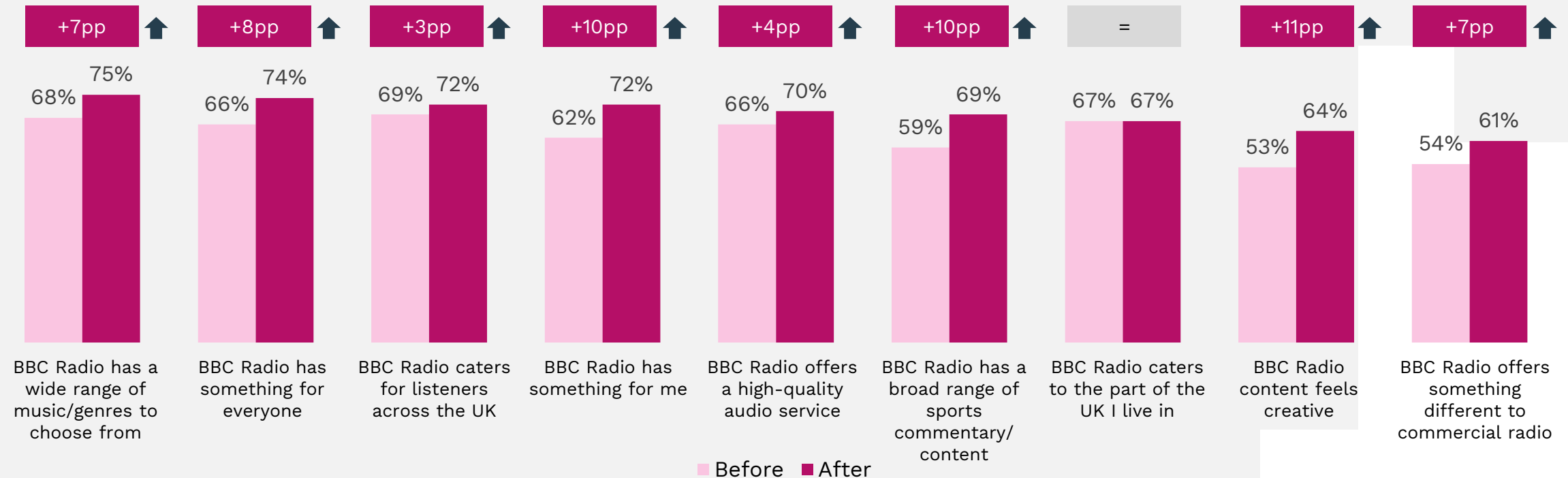
Over 65% very positive response

Between 55-65% positive response

Under 55% less positive response

Collectively, the new services improve perceptions of BBC Radio, with range and something for everyone leading the way

ALL LISTENERS: BBC Radio perceptions (before and after being shown the new audio services)
 % Agree on a five-point scale – significant changes highlighted



All age groups highlight the wide range of music and sports content, creativity and distinctiveness as improvements

ALL LISTENERS: BBC Radio perceptions - the impact of the BBC launching new audio services

% uplift scores – before vs. after being shown the new audio services (see appendix for full results)

Indicates a significant difference

% uplift scores	Total	16-34	35-54	55+	C2DE	B.A.M.E	Scotland	Wales	Northern Ireland	Non-BBC listeners
BBC Radio has a wide range of music to choose from	+7pp	+6pp	+8pp	+9pp	+8pp	+12pp	+11pp	+9pp	=	+19pp
BBC Radio has something for everyone	+8pp	+4pp	+8pp	+9pp	+9pp	+11pp	+10pp	+6pp	+9pp	+20pp
BBC Radio caters for listeners across the UK	+3pp	+2pp	+2pp	+2pp	+3pp	+3pp	+6pp	+2pp	+2pp	+11pp
BBC Radio has something for me	+10pp	+9pp	+10pp	+13pp	+12pp	+14pp	+13pp	+12pp	+5pp	+32pp
BBC Radio offers a high-quality audio service	+4pp	+3pp	+4pp	+4pp	+5pp	+5pp	+2pp	+4pp	+6pp	+14pp
BBC Radio has a broad range of sports commentary / content	+10pp	+11pp	+10pp	+9pp	+10pp	+13pp	+7pp	+15pp	+11pp	+16pp
BBC Radio caters to the part of the UK I live in	=	=	+2pp	+1pp	+3pp	-1pp	=	+4pp	-2pp	+8pp
BBC Radio content feels creative	+11pp	+10pp	+11pp	+11pp	+13pp	+13pp	+14pp	+3pp	+19pp	+21pp
BBC Radio offers something different to commercial radio	+7pp	+10pp	+7pp	+5pp	+10pp	+6pp	+7pp	+8pp	+8pp	+12pp

For underserved audiences, the new services will help to broaden and diversify the BBC's Radio offer

ALL LISTENERS: BBC Radio perceptions - the impact of the BBC launching new audio services

% uplift scores – before vs. after being shown the new audio services (see appendix for full results)

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BBC Radio offers a high-quality audio service	+4pp	+3pp	+4pp	+4pp	+5pp	+5pp	+2pp	+4pp	+6pp	+14pp
BBC Radio has a broad range of sports commentary / content	+10pp	+11pp	+10pp	+9pp	+10pp	+13pp	+7pp	+15pp	+11pp	+16pp
BBC Radio caters to the part of the UK I live in	=	=	+2pp	+1pp	+3pp	-1pp	=	+4pp	-2pp	+8pp
BBC Radio content feels creative	+11pp	+10pp	+11pp	+11pp	+13pp	+13pp	+14pp	+3pp	+19pp	+21pp
BBC Radio offers something different to commercial radio	+7pp	+10pp	+7pp	+5pp	+10pp	+6pp	+7pp	+8pp	+8pp	+12pp

Among non-listeners, we see some strong improvements, which will significantly improve perceptions

ALL LISTENERS: BBC Radio perceptions - the impact of the BBC launching new audio services

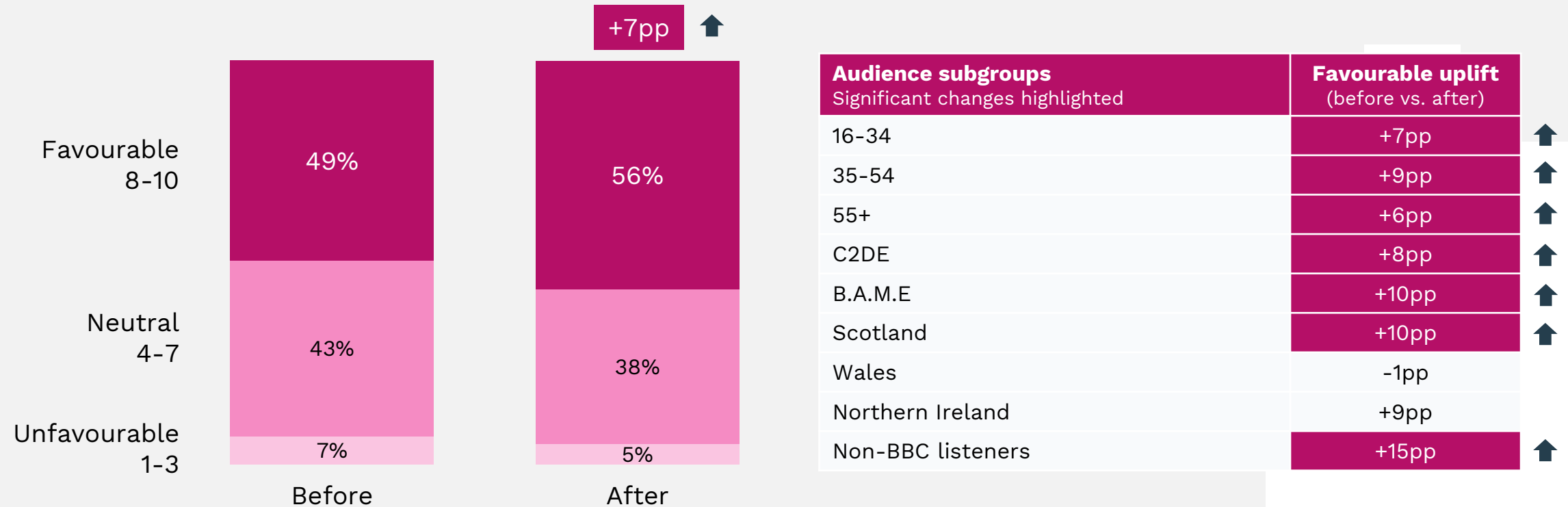
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BBC Radio offers something different to commercial radio	+7pp	+10pp	+7pp	+5pp	+10pp	+6pp	+7pp	+8pp	+8pp	+12pp

All of this results in a more favourable perception of BBC Radio, across many different audiences, especially for Non-listeners

ALL LISTENERS: Impact of proposed changes on the BBC Radio offer Before and after being shown the new audio services



Source: MTM BBC Radio PIT quantitative analysis (Fieldwork conducted 24th Jan-1st Feb 2024)

Base: All Radio listeners n=3,000; Radio listeners aged 16-34 n=882, 35-54 n=1,076, 55+ n=1,042, who are C2DE n=1,320, B.A.M.E n=343, in Scotland n=292, in Wales n=171, in Northern Ireland n=87, don't listen to BBC Radio n=493. Question B4. Thinking about the overall BBC Radio offer, please complete the below statement: The current BBC Radio offer is.... E1. Thinking now about the increased BBC Radio offer, please complete the below statement: BBC Radio's offer, including the 5 services, would be....

Significance callouts at the 95% confidence interval:



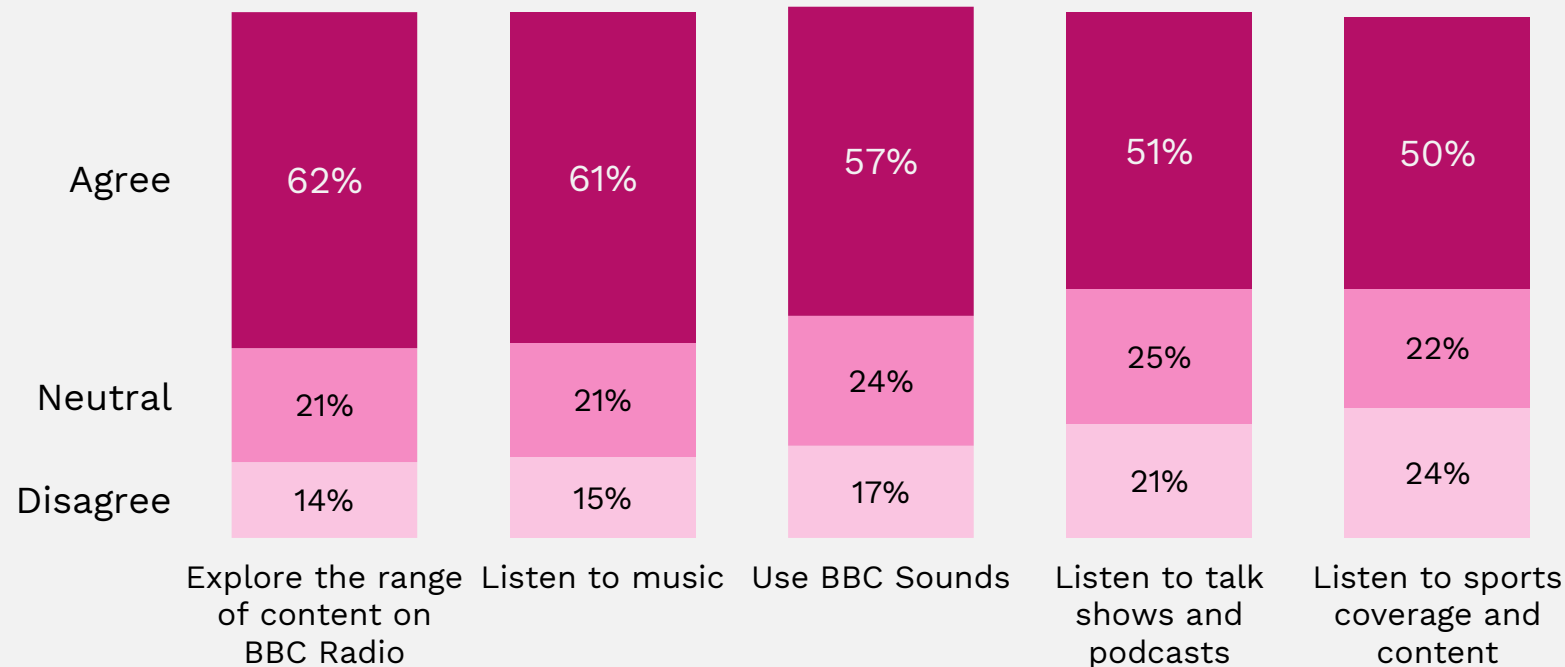
Impact on listening behaviours



The popularity of new audio services will provide more opportunities for people to listen to BBC Radio and BBC Sounds

ALL LISTENERS: Personal impact for BBC Radio

I would be more likely to go to BBC stations to:



“

These stations are bringing something new and something different. Then I'd be more likely to engage with them (BBC),

*Whereas **now I don't feel like they have anything that's so unique that it would sway me towards them.** But I think the kind of things that were outlined would maybe **make me a bit more interested and more likely to engage***

Light/Non, 19-24, C2DE

“

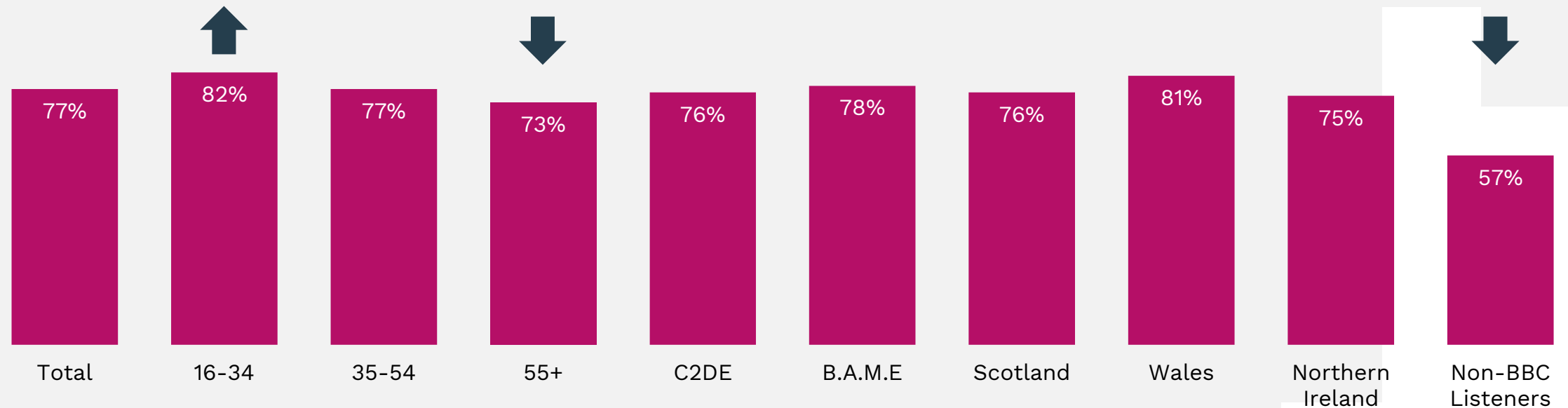
*I think you're **opening more doors for more people**, because it's not a whole mixture of different types of music. You've got dance, you've got classical, you've got soothing and relaxing... I think you're opening more doors and **giving more people more opportunity to try that type of music.** So, I think it's a good thing. You'll get a lot more listeners, a lot.*

Light/Non, 35-54, C2DE

3 in 4 say the new services are more likely to make them go to or explore the range of BBC Radio content

ALL LISTENERS: Personal impact for BBC Radio – net score

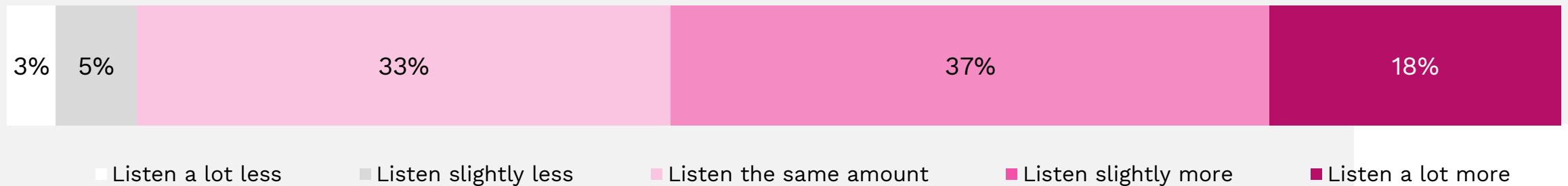
Anyone who agrees with the statements: I would be more likely to go to BBC stations to listen to music, listen to talk shows and podcasts, listen to sports coverage and content, explore the range of content on BBC Radio or use BBC Sounds



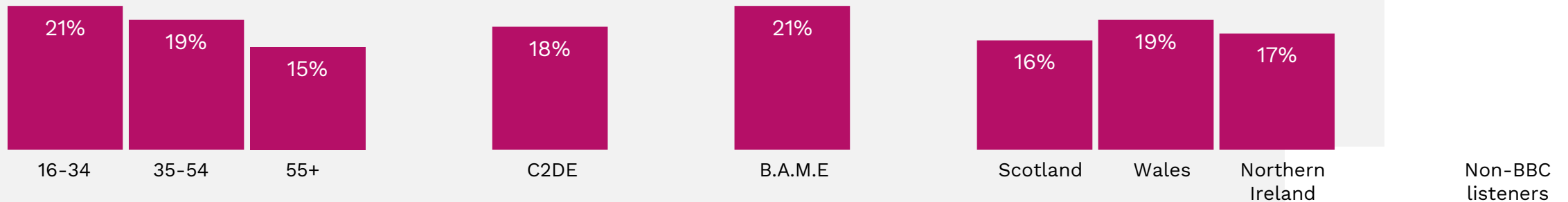
As a result, current listeners claim more time will be spent with BBC Radio and BBC Sounds

Impact on current listening to BBC Radio

If all the changes were made, would it change how often you use BBC Radio / BBC Sounds?



% of audiences who are likely to listen a lot more



Existing BBC Radio and audio listeners could identify how the new services might become part of their repertoire

CURRENT LISTENERS (Heavy/Mid)

Extending the range of Radio services available to existing listeners appeals, providing the ability to **expand their options and try something new**

By having these available within a single place (BBC Sounds) this makes it **easy to find** and try any of the new ideas

A recognition that **different moods / mindsets / occasions and times of day** might mean they want to try something new or different to **reflect the scenario or how they are feeling**

Heavy and mid BBC listeners are able to find examples of **how the new proposed services could play that role**, offering something different to what they listen to at the moment

“

*I like the **wellbeing** (Relax)... To have a Radio station that's playing stuff and **content like that consistently** would appeal to me.*

Heavy/Mid, 35-54, C2DE

“

*I like the BBC Sounds app and I think kind of making it more concise and **having it with more stations and more places to listen to that, to me, is really appealing.***

Heavy/Mid, 19-24, ABC1

“

*You kind of have to think about **what you're going to be doing when you're listening to it.** So high energy, mood boosting mainstream dance music (Dance), doing the chores around the house.. it's something to **give you a bit of get-up-and-go** to tackle that and **help with the mood as well.** So for that reason, I scored it so highly, thinking about what I was doing while I would be listening to it*

Heavy/Mid, 25-34, ABC1

“

*Personally, I think it's brilliant, and I would listen to it (Anthem)... I think for me, **when I'm doing something like cleaning or decorating, I don't want any sort of break.** If I want it to be a mixture of talking and music, then I would put the Radio on. But if I don't want any interruptions, I don't want any talking. I literally **just want straight music that you can sing along to without stopping.***

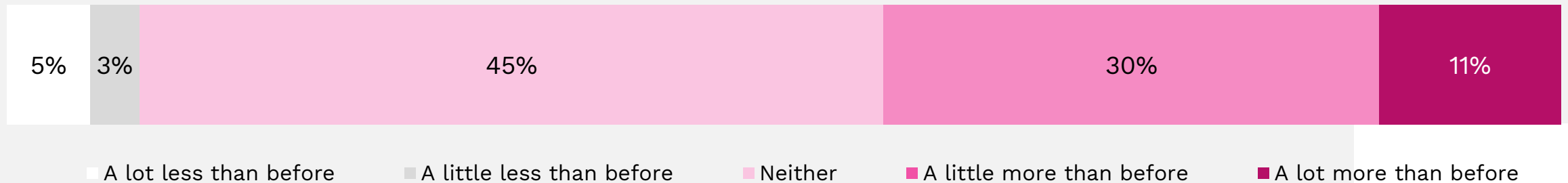
45

Heavy/Mid, 25-34, C2DE

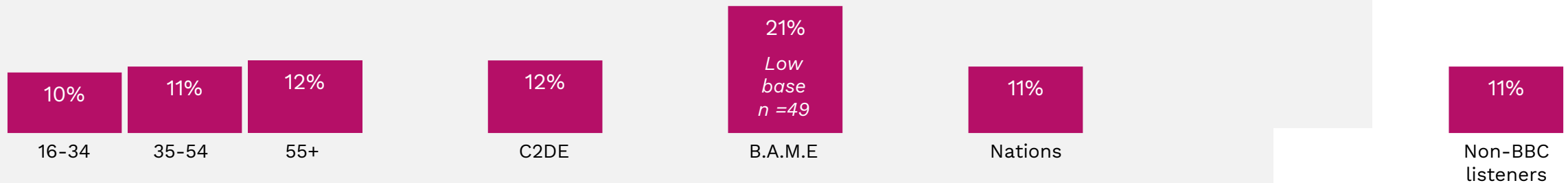
Just over 1 in 10 non-listeners could listen “a lot more” to BBC Radio and 3 in 10 “a little more” if the changes were made

Impact on non-listeners to BBC Radio

If all the changes were made, how likely would you be to start listening to BBC Radio / BBC Sounds?



% of audiences who are a lot more likely to listen than before



The proposed changes will help light/non listeners to find BBC stations that will deliver against their needs

NON-LISTENERS (Light/Non)

Light/Non listeners are happy to see the BBC trying to innovate and offer something new. There's appetite to trial those stations relevant to their existing habits and to see what they might offer in comparison to their commercial stations

Stations aligned to genres, moods and moments will help to demystify some of their perceptions of BBC Radio. Simplifying the decision-making process and pushing BBC into the consideration set alongside commercial stations

Even among light/non listeners, there's **an expectation that the BBC brings a certain level of quality to Radio, and there's an interest in experiencing their take** on these stations

Especially for non-listeners, the **stations will provide an easier way into BBC Radio**, from which they potentially go on to explore existing networks or BBC Sounds and develop a greater appreciation of the portfolio



I think there was something different in each of the offerings to what is already out there. I think it would be good for the BBC, but similarly, to have more diverse Radio stations would also benefit the public

Light/Non, 19-24, C2DE



It's more specific. You'll know where to go to get the music or the information you want, rather than just turning on the Radio and seeing what happens

Light/Non, 55-64, ABC1



I think the BBC delivers a really good package already, and these new suggested ideas are really appealing to me and would enhance the offering from the BBC

Light/Non, 35-54, ABC1



I think it's a positive addition, it fills that gap for me, there's just nothing being offered at the moment that I like to listen to, it fills a lot of that for me

Light/Non, 25-34, ABC1

Deep dive into each of the proposed new services



Nostalgia

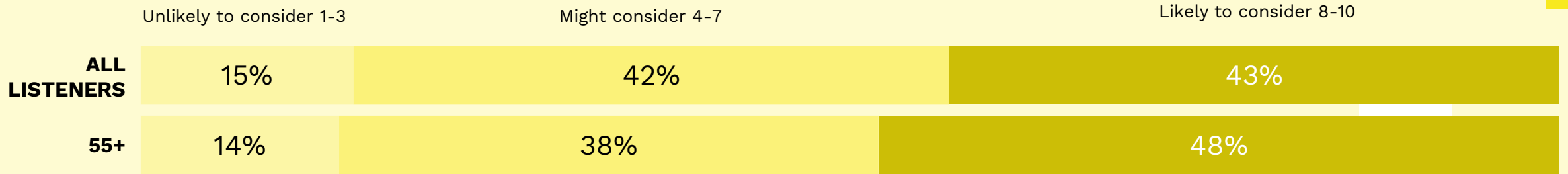
Nostalgia



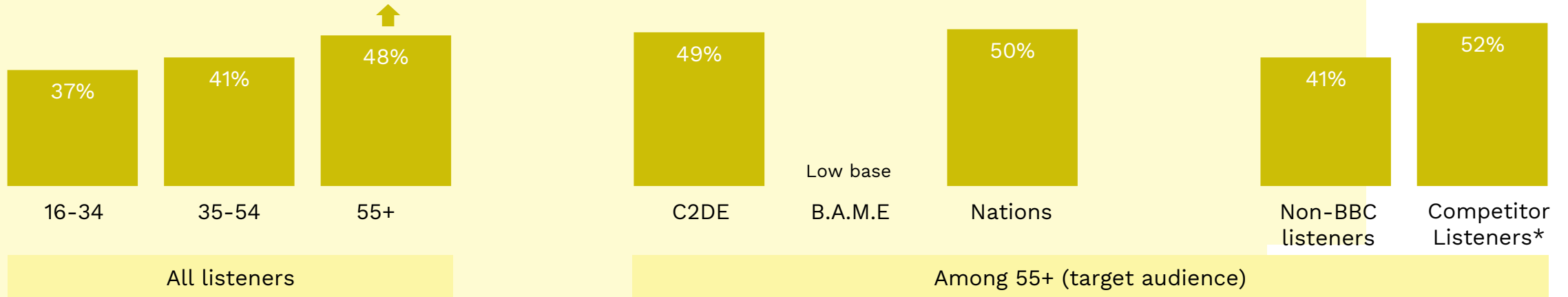
- The best classic pop, primarily from the 50s, 60s and 70s
- Featuring artists like Abba, The Beatles, Stevie Wonder, Dusty Springfield, Elvis Presley, Elton John and the Rolling Stones
- Presenters known for their passion and expertise
- Telling the story of artists and tracks that shaped popular music

Nostalgia is popular, with good likelihood to listen scores, especially among the target audience 55+

Likelihood to listen to Nostalgia (with BBC branding)



% of audiences who are likely to consider listening (8-10)



* Net: Greatest Hits Radio, Absolute 60s/70s, Heart 70s, Boom Radio

Qualitative discussions showed appeal beyond 55+ age groups, but with potentially limited listening occasions

APPEALING ASPECTS

✓ *Upbeat and uplifting*

Nostalgic music selection associated with instant mood lift

✓ *Nostalgic for older*

Appeals to memories of growing up / time with family for older audiences

✓ *Discovery for younger*

Helps to introduce younger generations to new eras of music, connecting them with family members

✓ *Storytelling and expertise*

Telling the story of the history of music feels strongly distinctive and credible from the BBC (expectations of knowledgeable presenters)

mtm

 = unique value from being delivered by BBC



*I think there's a lot of **stories that can be told that haven't been told** about famous records and different versions of the same track. I think there's **quite a bit of history** in there that could be interesting to listen to.*

Light/Non, 65+, C2DE

*I'm very open minded when it comes to music. So I think sometimes it's **nice to listen to music that my parents would listen to** as well. That would appeal to me, definitely.*

Light/Non, 55-64, ABC1



*You're speaking to a girl who **queued up all night to see the Rolling Stones**, which is why I sort of **still like 60s type music**.*

Heavy/Mid, 65+, ABC1

AREAS OF CONCERN

? *Can be polarising*

Some listeners reject these music genres, as they feel less relevant to them (e.g. 1950s)

? *Must connect to modern times*

There's a risk that just focusing on previous eras could get boring; listeners are keen for the service to connect these eras to modern music (potentially through the stories told around them)

? *Exists on commercial*

Some listeners felt that this concept is already covered by commercial stations like Gold and Absolute with decade-specific services



*The idea is good for **people that like that era**, that genre, that time of music, but for me, **personally, I'm not interested**.*

Light/Non, 25-34, C2DE



*Don't get me wrong, I like music from those eras. I'm a 50s baby, but I **don't want to just live in the past**. There's so much new music which is amazing, so I want a much **wider variety**. I mean, I would probably **dip in and out** now and again, but primarily I want a huge range of a mix. I don't want to be stuck in one place.*

Heavy/Mid, 65+, ABC1

The focus on storytelling and expertise delivers high expectations for learning and distinctiveness

PUBLIC PURPOSES

1. To provide impartial news and information

2. To support learning for everyone

3. To be creative and distinctive, whilst delivering high quality

4. To reflect, represent and serve everyone in the UK

REASON

No focus on news content

Telling the story of artists and tracks seen as educational

Storytelling around music feels distinctive; high expectations for presenters' expertise

Expands music offering for older listeners (currently served mainly by R2)

DEVELOPMENT AREAS

N/A

Opportunity to **link genres to modern music** to engage/educate younger

There is licence to be **ambitious** with **in-depth storytelling**

Ensure music covers **broad influences from a variety of genres and backgrounds**

“

*We're talking 30, 40, 50 years worth of music and artists and stories and **how they impacted the culture** and whether that's **music culture, wider culture**, because all these people, especially the Beatles and things like that, I think that it's **creative** and there's definitely a way there that it can bring almost the kind of **niche podcast element** of things to a Radio station. I think that **no one else is doing that.***

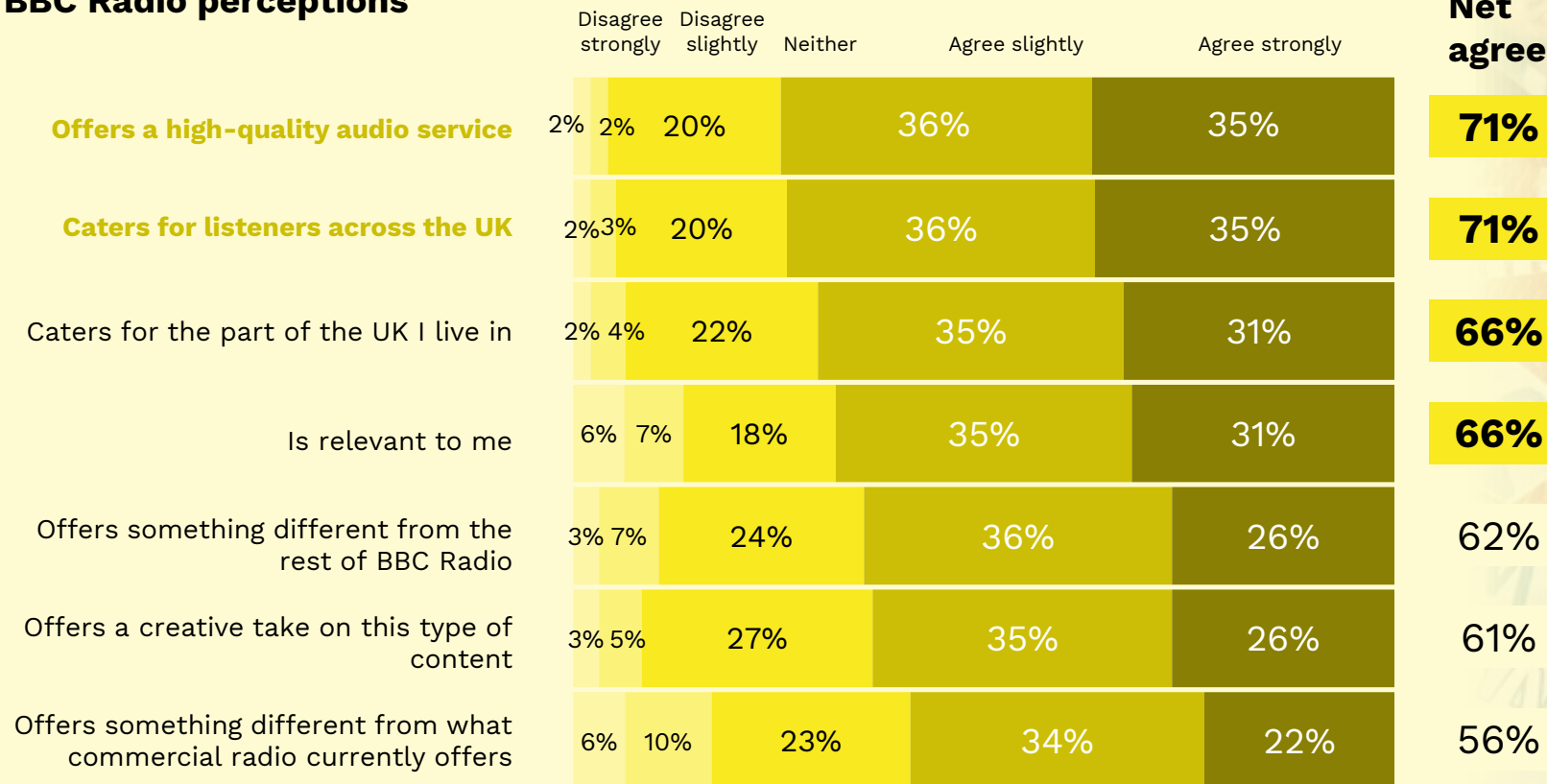
Heavy/Mid, 35-54, C2DE

*Telling the story of the artists and tracks that sit within popular music... I feel like that's a bit **more than just the songs** - it's actually the **history of music.***

Heavy/Mid, 25-34, C2DE

The target audience (55+) is positive towards Nostalgia, highlighting high-quality and catering for all listeners

TARGET AUDIENCE 55+ BBC Radio perceptions



65%+ very positive response
Between 55-65% positive response
Under 55% less positive response

63%
Agree 'this change is a good thing for the BBC to do'

We also see a positive response among underserved audiences (within the target age)

BBC Radio perceptions
% net agreement scores

Over 65% very positive response

Between 55-65% positive response

Under 55% less positive response

	ALL LISTENERS			TARGET AUDIENCE 55+				
	16-34	35-54	55+	C2DE	B.A.M.E	Nations	Non-BBC Listeners	Competitor listeners*
Offers a high-quality audio service	62% ↓	62% ↓	71% ↑	68%	Low base	74%	59% ↓	73%
Caters for listeners across the UK	59% ↓	60% ↓	71% ↑	72%		69%	64% ↓	71%
Caters for the part of the UK I live in	53% ↓	59%	66% ↑	68%		67%	56% ↓	69%
Is relevant to me	51% ↓	54% ↓	66% ↑	65%		66%	56% ↓	68%
Offers something different from the rest of BBC Radio	56%	57%	62%	61%		65%	47% ↓	64%
Offers a creative take on this type of content	56%	55%	61% ↑	60%		63%	50% ↓	65%
Offers something different from what commercial radio currently offers	53%	56%	56%	57%		56%	45% ↓	60%



Source: MTM BBC Radio PIT quantitative analysis (Fieldwork conducted 24th Jan-1st Feb 2024)

Base: All Radio listeners n=3000, Radio listeners aged 16-34 n=799, aged 34-54 n=982, 55+ n=1,219. . Radio listeners aged 55+ who are C2DE n=480, in Scotland, Wales, or Northern Ireland n=215, don't listen to BBC Radio n=224, or listen to competitor stations (Greatest hits Radio, Absolute 60s/70s, Heart 70s, Boom Radio) n=425.

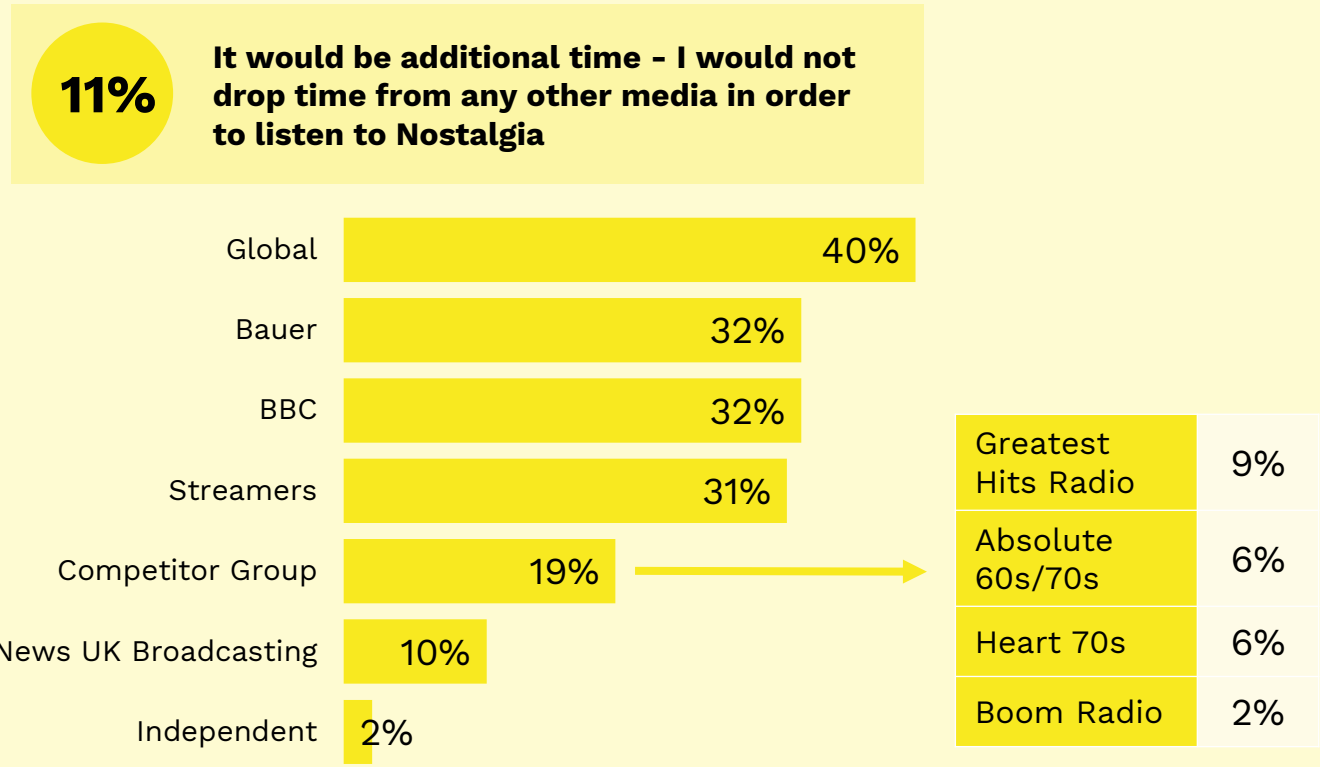
Question D3. To what extent do you think this proposed change sounds like it does the following? D4. We are interested to know if you think the BBC should launch introduce [Nostalgia]? After seeing the proposed change, to what extent do you agree that [Nostalgia] this is a good thing for the BBC to do?

Significance callouts at the 95% confidence interval: ↑ ↓

Listening will come from a broad mix of places, including Spotify, commercial and BBC Radio

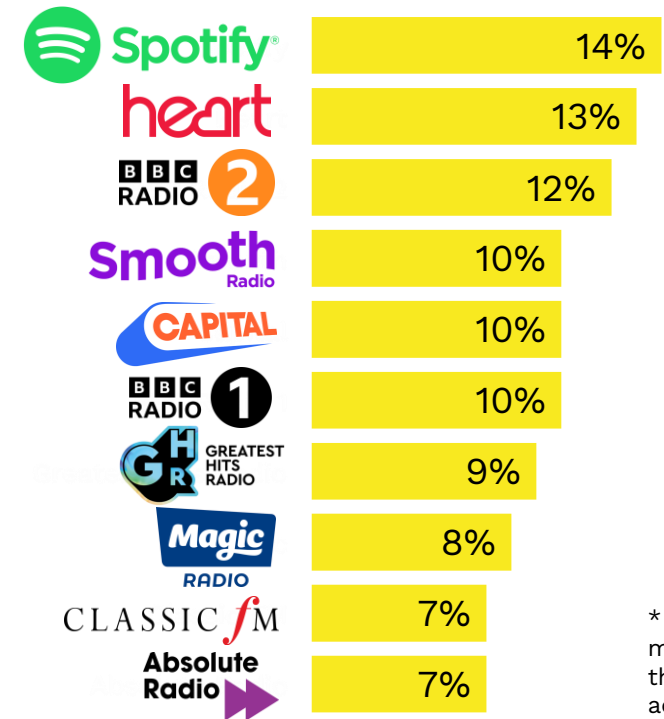
Where might listening be taken from

Respondents who say they are likely to listen to Nostalgia
% who claim listening would come from these stations*



Top 10 places listening might be taken from

Respondents who say they are likely to listen to Nostalgia
% who claim listening would come from these stations*



* This was a multicode question, thus percentages will add to over 100%.

Anthems

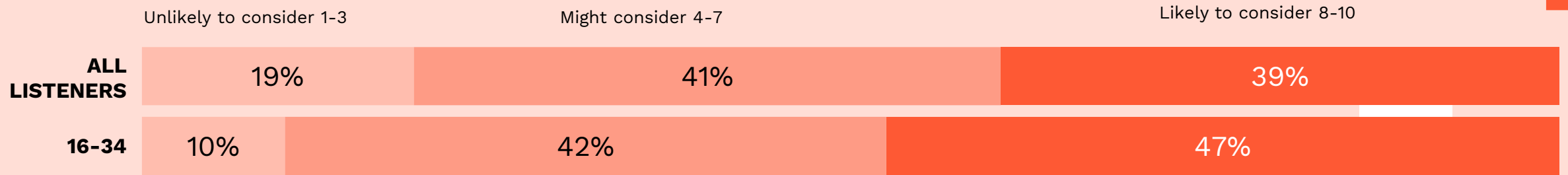
Anthems



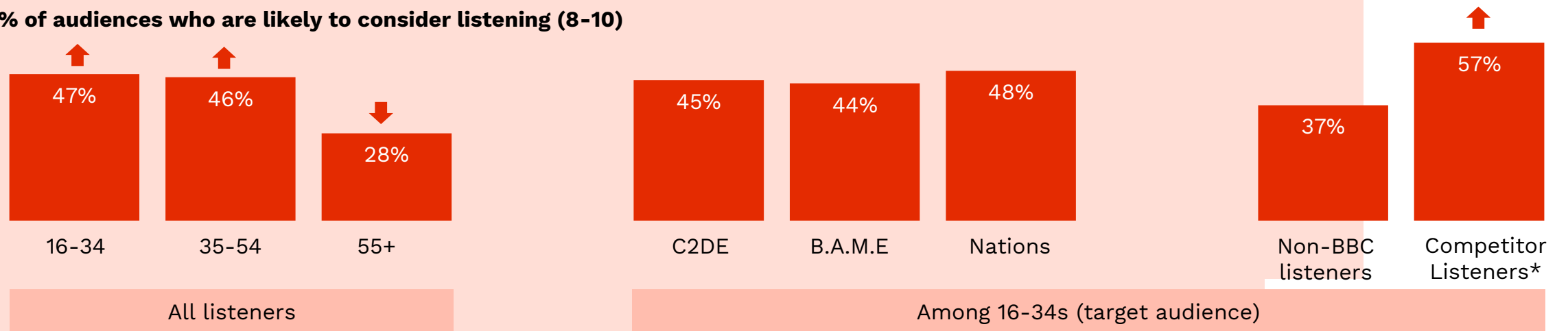
- The biggest British and global hits from the 2000s to now
- A collection of anthems to boost your mood at any time of day
- Discover and re-discover iconic songs to sing out loud
- Featuring artists including Dua Lipa, Foals, Rihanna, The Killers, Stormzy, Taylor Swift

Anthems is popular among 16–34s and 35–54s, with good likelihood to listen scores

Likelihood to listen to Anthems (with BBC branding)



% of audiences who are likely to consider listening (8-10)



* Net: Hits Radio, Virgin Radio Anthems, Absolute 00s/10s



Source: MTM BBC Radio PIT quantitative analysis (Fieldwork conducted 24th Jan-1st Feb 2024)
 Base: All Radio listeners n=3000, Radio listeners aged 16-34 n=799, aged 34-54 n=982, 55+ n=1,219. Radio listeners aged 16-34 who are C2DE n=390, B.A.M.E n=200, in Scotland, Wales, or Northern Ireland n=138, don't listen to BBC Radio n=101, or listen to competitor stations (Hits Radio, Virgin Radio anthems/Absolute 00s/10s) n=380. D2: Knowing that this service is from the BBC, how likely would you be to listen to this new Radio station?

Significance callouts at the 95% confidence interval: ↑ ↓

While the idea does not feel unique in the wider Radio landscape, many felt it was a missing link for the BBC

APPEALING ASPECTS

✓ **Mood-boosting**

Nostalgic anthems meet mood-enhancing needs throughout the day

✓ **Bringing people together**

Has broad appeal for all generations, creating moments of togetherness (e.g. school run)

✓ **Filling the gap**

Appeals to those who feel they are too old for R1 but too young for R2

✓ **Expanding music taste**

Helps older listeners stay connected with more contemporary hits

mtm

 = unique value from being delivered by BBC



*It's literally, me in a Radio station. So the fact that it will have everything in there and it also has your kind of stuff that I **grew up listening** to as well as the **modern-day stuff**, for me, that's a **perfect package**.*

Light/Non, 25-34, ABC1



*That's the sort of music I grew up **with**, it'd be nice to go back and listen to some of the stuff I don't think to listen to now*

Heavy/Mid, 25-34, C2DE

*If you think that Radio station was in the car, actually the **conversations which parents might have with their kids** be like, "oh, I can't believe you're listening to this song. I used to listen to this song." That would **encourage them to put it on in the kitchen and just to have those kind of conversations**.*

Heavy/Mid, 25-34, ABC1

AREAS OF CONCERN

? **Commercial alternatives exist**

Many feel that this concept already exists from stations like Heart 00s and Magic 00s

? **Non-Radio alternatives available**

Streaming services meet the anthem and mood-boosting need state well

? **Less popular among older**

Not nostalgic for older (55+) listeners



*This **doesn't really seem any different** to what Heart plays at the moment. You're adding another Radio station in that is really **similar to Heart and Kiss and Capital**. To me, there's **not really anything unique** about 2000s modern pop songs.*

Heavy/Mid, 19-24, ABC1

It just sounds like every other radio station. In theory it sounds like a good radio station but because I know the current stations play that type of music...I probably wouldn't like this one

Light/Non, 19-24, C2DE

*I don't think it's **doing anything particularly different ... Kiss, Heart, Radio One, Radio Two** all do a lot of that stuff as well. It's just another station doing the same thing.*

Heavy/Mid, 65+, ABC1

To make the idea more distinctive, BBC can leverage reputation for artist closeness, live music and presenters

PUBLIC PURPOSES

1. To provide impartial news and information

2. To support learning for everyone

3. To be creative and distinctive, whilst delivering high quality

4. To reflect, represent and serve everyone in the UK

REASON

No focus on news content

Keeps older listeners in touch with more contemporary hits

Delivers the best of pop music, but doesn't feel unique vs. what already exists

Appeals to tastes of different generations, helping them to enjoy together

DEVELOPMENT AREAS

N/A

Communicate **why these were such big hits at the time** and any influences on current day

Develop distinctiveness via **expert music presenters, curated** programmes or **exclusive live music**

Ensure the definition of 'anthems' encapsulates **broad range of influences**

“

*In terms of **servng everyone in the UK**, you could see how a song or a Radio station, which actually just plays all those songs, would **bring a group of people together** because they're playing the anthems, which everybody likes.*

Heavy/Mid, 25-34, ABC1

*I stopped listening to Radio 1 a year ago but Radio 2 still feels too old for me so I think the noughties one **fills a gap**. I would say it sits **between Radio 1 and Radio 2...***

Heavy/Mid, 25-34, ABC1

16-34s feel Anthems would be a high-quality service, which caters to listeners from across the UK

TARGET AUDIENCE 16-34 BBC Radio perceptions

	Disagree strongly	Disagree slightly	Neither	Agree slightly	Agree strongly	Net agree
Caters for listeners across the UK	6%	7%	21%	35%	28%	63%
Offers a high-quality audio service	5%	6%	25%	33%	27%	60%
Caters for the part of the UK I live in	6%	8%	24%	33%	24%	57%
Is relevant to me	6%	11%	23%	33%	24%	57%
Offers a creative take on this type of content	6%	11%	22%	33%	23%	56%
Offers something different from the rest of BBC Radio	5%	10%	25%	32%	23%	55%
Offers something different from what commercial radio currently offers	6%	11%	24%	32%	22%	54%

65%+ very positive response
Between 55-65% positive response
Under 55% less positive response

50%
Agree 'this change is a good thing for the BBC to do'

Overall perceptions are positive, although less so among some underserved audiences

BBC Radio perceptions

% net agreement scores

Over 65% very positive response

Between 55-65% positive response

Under 55% less positive response

	ALL LISTENERS			TARGET AUDIENCE 16-34				
	16-34	35-54	55+	C2DE	B.A.M.E	Nations	Non-BBC Listeners	Competitor listeners*
Caters for listeners across the UK	63%	63%	65%	60%	61%	63%	57%	66%
Offers a high-quality audio service	60% ↓	64%	66%	58%	57%	64%	59%	69% ↑
Caters for the part of the UK I live in	57%	60%	58%	54%	48% ↓	59%	55%	65% ↑
Is relevant to me	57% ↑	59% ↑	45% ↓	52%	50%	53%	52%	63%
Offers a creative take on this type of content	57%	60%	54%	54%	52%	55%	50%	64% ↑
Offers something different from the rest of BBC Radio	55%	58%	54%	53%	48%	48%	51%	67% ↑
Offers something different from what commercial radio currently offers	55%	56%	50%	52%	48%	55%	47%	65% ↑

Source: MTM BBC Radio PIT quantitative analysis (Fieldwork conducted 24th Jan-1st Feb 2024)

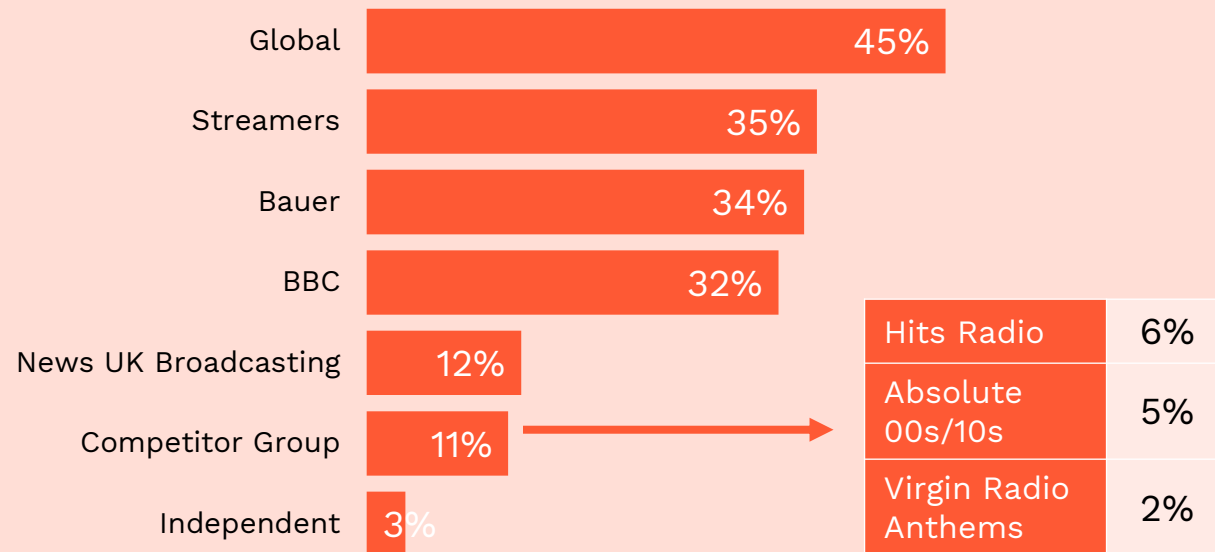
Base: All Radio listeners n=3000, Radio listeners aged 16-34 n=799, aged 34-54 n=982, 55+ n=1,219. Radio listeners aged 16-34 who are C2DE n=390, B.A.M.E n=200, in Scotland, Wales, or Northern Ireland n=138, don't listen to BBC Radio n=101, or listen to competitor stations (Hits Radio, Virgin Radio anthems/Absolute 00s/10s) n=380. Question D3. To what extent do you think this proposed change sounds like it does the following? D4. We are interested to know if you think the BBC should launch introduce [Anthems]? After seeing the proposed change, to what extent do you agree that [Anthems] this is a good thing for the BBC to do?

Listening would mainly come from Spotify and the leading national stations (Heart, Capital, and BBC Radio 1)

Where might listening be taken from

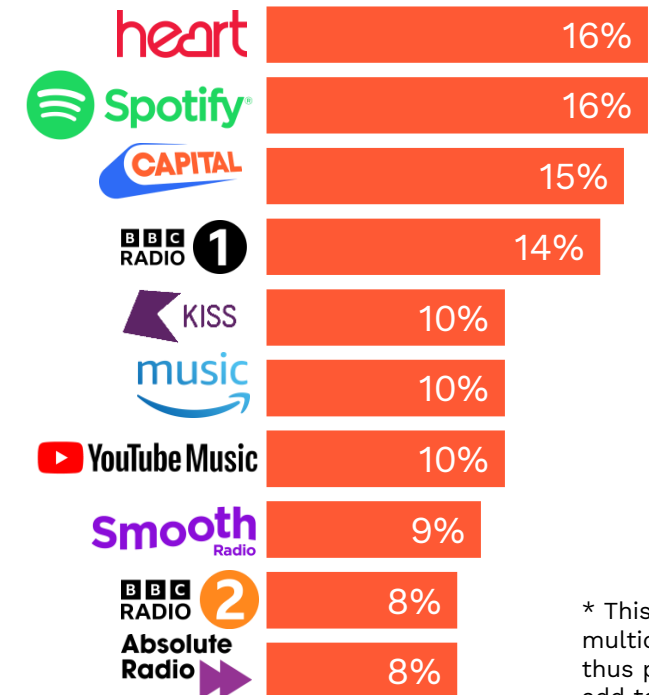
Respondents who say they are likely to listen to Anthems
% who claim listening would come from these stations*

9% It would be additional time - I would not drop time from any other media in order to listen to Anthems



Top 10 places listening might be taken from

Respondents who say they are likely to listen to Anthems
% who claim listening would come from these stations*



* This was a multicode question, thus percentages will add to over 100%.

Relax & escape

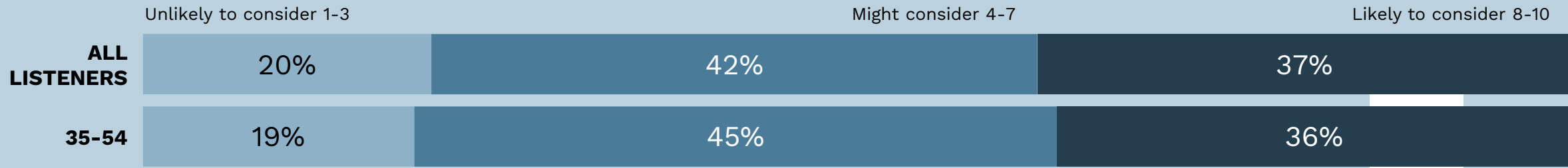
Relax & escape



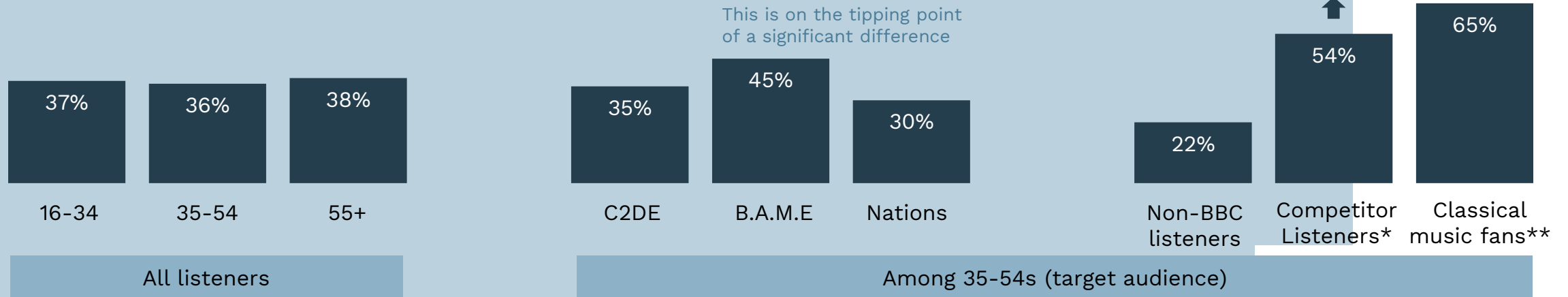
- Soothing classical music, familiar and new
- To support your wellbeing and help you unwind
- A peaceful antidote to the stresses and strains of modern life

1 in 3 are likely to listen to Relax, but it appeals more to B.A.M.E audiences and classical music fans

Likelihood to listen to Relax and Escape (with BBC branding)



% of audiences who are likely to consider listening (8-10)

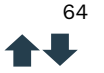


*Classic FM, Scala, Smooth Chill, Virgin Chilled, Magic Chilled
* who listen to BBC Radio 3 and Classic FM or Scala



Source: MTM BBC Radio PIT quantitative analysis (Fieldwork conducted 24th Jan-1st Feb 2024)
Base: All Radio listeners n=3000, Radio listeners aged 16-34 n=799, aged 34-54 n=982, 55+ n=1,219, aged 35-54 who listen to Radio 3 and one or both of Classic FM/Scala n=179. Radio listeners aged 35-54 who are C2DE n=450 B.A.M.E n=113, in Scotland, Wales, or Northern Ireland n=197, don't listen to BBC Radio n=168, or listen to competitor stations (Classic FM, Scala, Smooth Chill, Virgin Chilled, Magic Chilled) n=390, D2: Knowing that this service is from the BBC, how likely would you be to listen to this new Radio station?

Significance callouts at the 95% confidence interval:



Appeal is related to interest in wellbeing and classical content, but a recognition there is value in the idea

APPEALING ASPECTS

✓ **Wellbeing focus**

Fulfilling a listening need to relax and unwind for a (more) positive mindset

✓ **Support for mental health**

A positive that the BBC is looking to support those who need it, and an expectation the BBC is well positioned to deliver this, given its emphasis on learning/education

✓ **Stress relief**

A recognisable scenario, where audiences want to be de-stressed

✓ **Encouraging escapism**

Helping fulfil a need to 'switch off' and it always being available

mtm

 = unique value from being delivered by BBC



*That could save so many lives and **people actually get better by listening to it***

Light/Non, 65+, C2DE, B.A.M.E



*Some of [Classic FM] is a bit random and it's just **the wellbeing focus (of this idea) that I like** ... something all dedicated to relaxing would really appeal to me, rather than the high, broad classical stuff.*

Light/Non, 35-54, ABC1



*(This has) **my name all over it.** Just, wellbeing, relaxing, escape soothing classical music...That's the sort of chapter, unfortunately, where I'm at right now, **it's all about just keeping myself chilled***

Heavy/Mid, 35-54, C2DE, B.A.M.E

AREAS OF CONCERN

? **Not for everyone**

Not all audiences feel that they need help or support in this space

? **Classical music content**

Some audiences prefer other genres to help unwind / de-stress

? **Concern over tone**

Some minor concerns this could feel patronising or too 'woke' (esp. older)

? **Non-Radio alternatives available**

On-demand content elsewhere may be more suitable to moods vs. Radio



*Well, **you don't necessarily have to have classical music to help you relax.** Everyone's different.*

So some people will deal with stress and things via upbeat music and have their escape in the form of upbeat music.

*It doesn't have to necessarily be slow, relaxing classical to help people unwind. **Some people get that from a higher tone of music.***

Heavy/Mid, 25-34, ABC1

You can find all this on YouTube** because you can key in classical music, relaxation for the soul, and **it gives you an abundance of different music.** So this is interesting, but it's still nothing new. Nothing new, really. **You could ask Alexa all of that and she'd give it to you.

Heavy/Mid, 55-64, C2DE

Relax & escape can lean more into the wellbeing aspect to reinforce expectations of what will make it different

PUBLIC PURPOSES

1. To provide impartial news and information



2. To support learning for everyone



3. To be creative and distinctive, whilst delivering high quality



4. To reflect, represent and serve everyone in the UK



REASON

No focus on news content

Learning how to relax (more), improve wellbeing and about new / diverse composers

Wellbeing focus feels unique and different to Radio alternatives (R3 & Classic FM)*

Whilst mixed appeal, can see value for others who may need this, plus new/diverse talent

DEVELOPMENT AREAS

N/A

Leaning into wellbeing and mindfulness and educating why these are important

Ensuring content **retains this focus**, supporting it vs. just classical without this context

Showcasing **new/diverse composers**, tailoring to **different wellbeing scenarios**

“

*I think this station will **provide everybody with love, light and healing** their wellbeing, somebody's who's not well.*

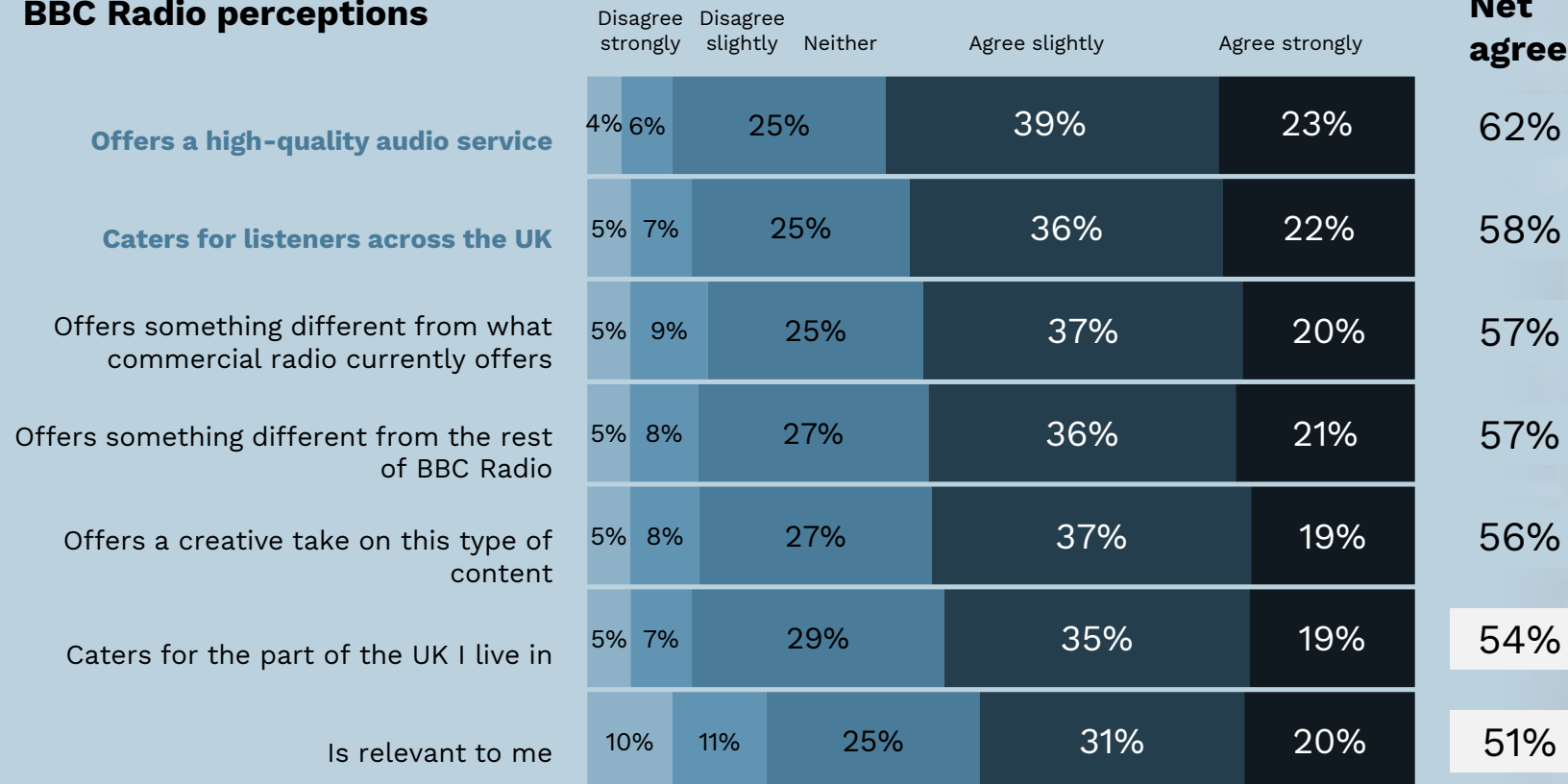
*And **this Radio station can approach young and old**, their wellbeing, especially, like, looking after yourself, unwinding and relaxing and in the everyday hustle and bustle of life.*

*We need a Radio station to (help) calm somebody down, meditate and just **take the good vibes of beautiful classical music***

Light/Non, 65+, C2DE, B.A.M.E

This will help to deliver on the expectations of a high-quality service which caters for listeners across the UK

TARGET AUDIENCE 35-54 BBC Radio perceptions



65%+ very positive response

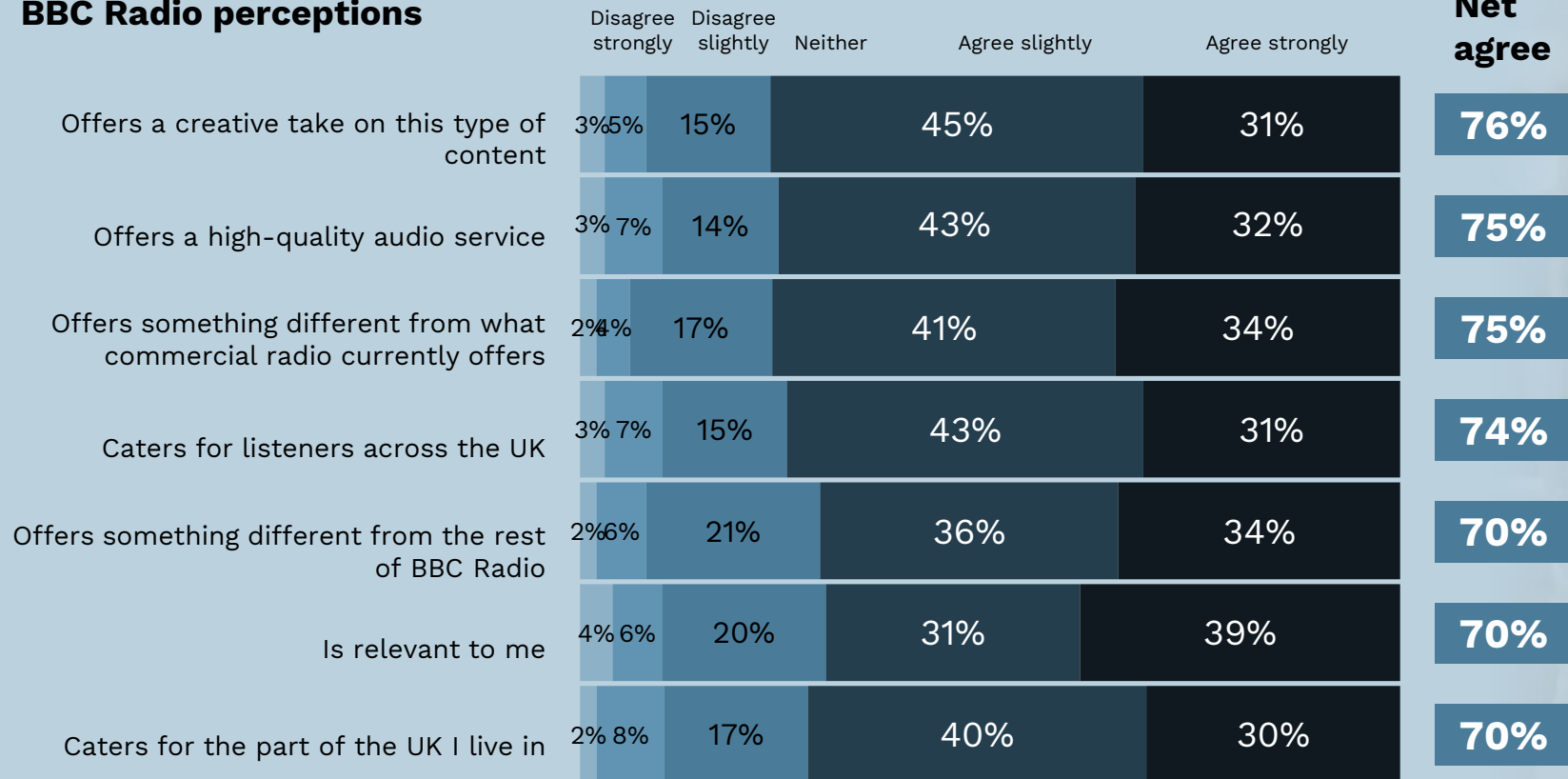
Between 55-65% positive response

Under 55% less positive response

51%
Agree 'this change is a good thing for the BBC to do'

Classical music fan's view Relax as a creative high-quality service, that will offer something different

35-54 CLASSICAL MUSIC FANS LISTENING TO BBC Radio 3 and Classic FM or Scala BBC Radio perceptions



65%+ very positive response

Between 55-65% positive response

Under 55% less positive response

72%
Agree 'this change is a good thing for the BBC to do'

We also saw a positive response among B.A.M.E audiences (within the target age group)

BBC Radio perceptions

% net agreement scores

Over 65% very positive response

Between 55-65% positive response

Under 55% less positive response

	ALL LISTENERS			TARGET AUDIENCE 35-54				
	16-34	35-54	55+	C2DE	B.A.M.E	Nations	Non-BBC Listeners	Competitor listeners*
Offers a high-quality audio service	60% ↓	62%	67%	58%	62%	57%	49% ↓	72% ↑
Caters for listeners across the UK	57% ↓	58% ↓	69% ↑	55%	67%	55%	49% ↓	68% ↑
Offers something different from the rest of BBC Radio	56%	57%	59%	51% ↓	56%	52%	43% ↓	65% ↑
Offers something different from what commercial radio currently offers	56%	57%	55%	53%	67% ↑	49% ↓	44% ↓	68% ↑
Offers a creative take on this type of content	56%	56%	59%	53%	60%	51%	42% ↓	69% ↑
Caters for the part of the UK I live in	54%	54%	61% ↑	50%	63%	49%	43% ↓	65% ↑
Is relevant to me	52%	51%	53%	49%	52%	42% ↓	38% ↓	65% ↑

Source: MTM BBC Radio PIT quantitative analysis (Fieldwork conducted 24th Jan-1st Feb 2024)

Base: All Radio listeners n=3000, Radio listeners aged 16-34 n=799, aged 34-54 n=982, 55+ n=1,219. Radio listeners aged 35-54 who are C2DE n=450, B.A.M.E n=113, in Scotland, Wales, or Northern Ireland n=197, don't listen to BBC Radio n=168, or listen to competitor stations (Classic FM, Scala, Smooth Chill, Virgin Chilled, Magic Chilled) n=390. Question D3. To what extent do you think this proposed change sounds like it does the following? D4. We are interested to know if you think the BBC should launch introduce [Relax and Escape]? After seeing the proposed change, to what extent do you agree that [Relax and Escape] this is a good thing for the BBC to do?



Significance callouts at the 95% confidence interval:

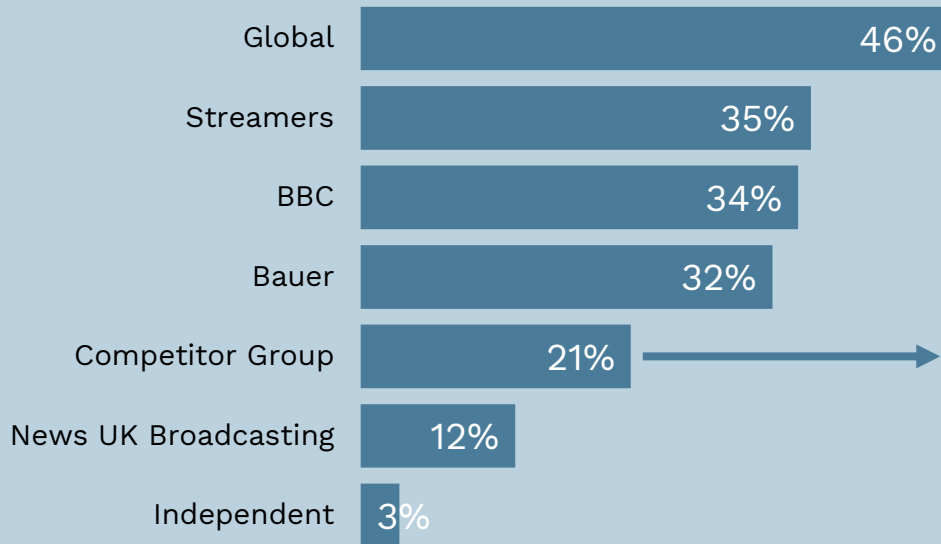


Relax is likely to attract listeners from across the radio spectrum, and from streamers such as Spotify

Where might listening be taken from

Respondents who say they are likely to listen to Relax
% who claim listening would come from these stations*

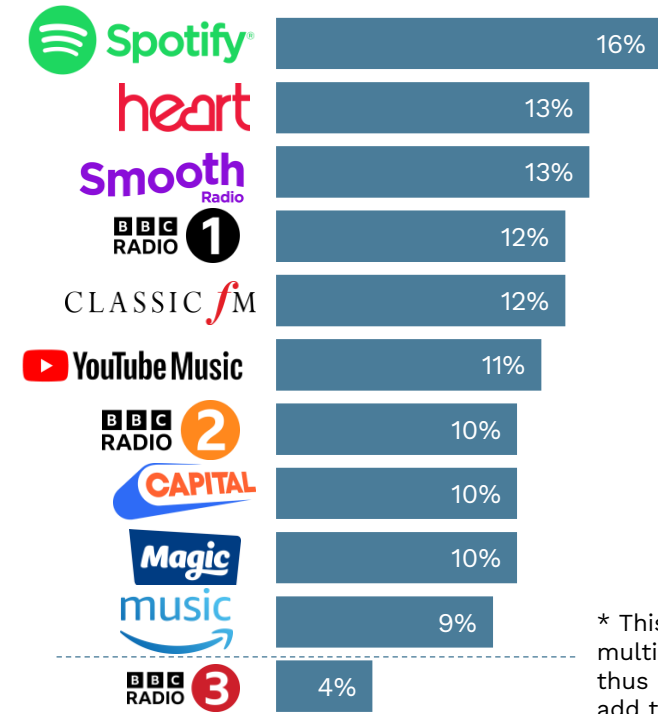
10% It would be additional time - I would not drop time from any other media in order to listen to Relax



Classic FM	12%
Smooth Chill	5%
Magic Chilled	4%
Virgin Chilled	3%
Scala	3%

Top 10 places listening might be taken from

Respondents who say they are likely to listen to Relax
% who claim listening would come from these stations*



* This was a multicode question, thus percentages will add to over 100%.

Dance

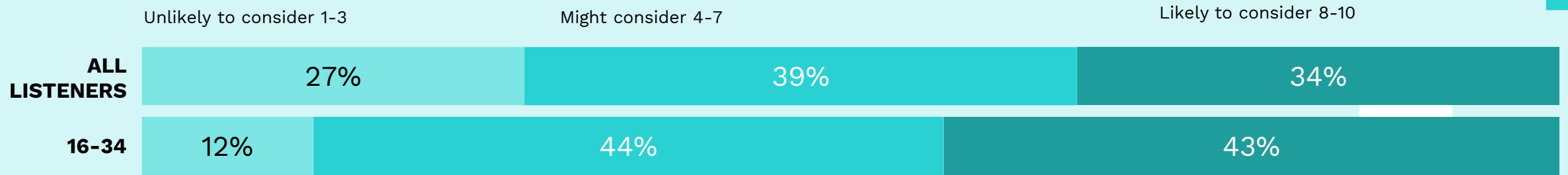
Dance



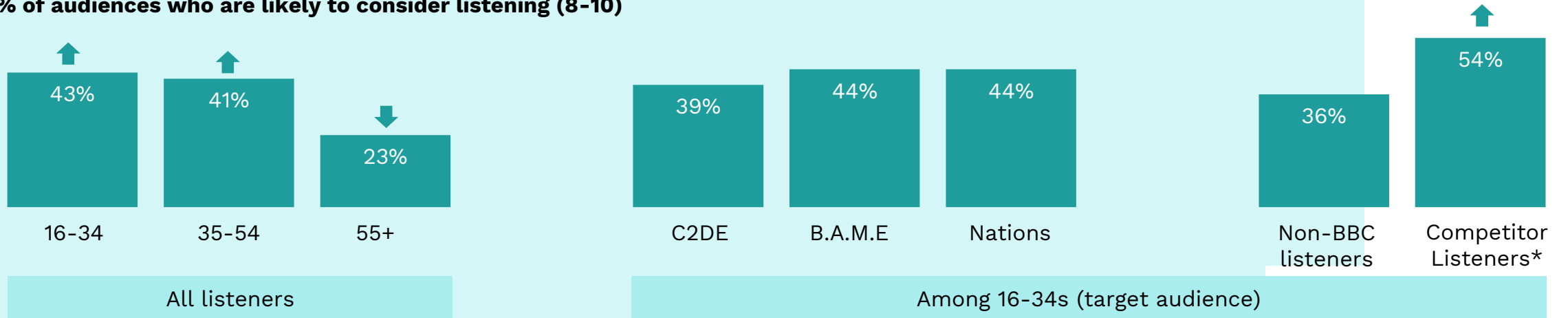
- High energy, mood-boosting mainstream dance music
- From classic dance anthems to hot, new tracks
- Featuring exclusive mixes and partnerships
- Brought to you by some of the UK's biggest DJs while supporting new and UK artists

Among 16-34s, the likelihood to consider score for Dance is good and only slightly behind that of Nostalgia & Anthems

Likelihood to listen to Dance (with BBC branding)



% of audiences who are likely to consider listening (8-10)



*Capital Dance, Heart Dance

Dance music meets core emotional need state (energising) while broadening influences and promoting new talent

APPEALING ASPECTS

✓ **Energising**

Energising music helps motivate listeners around daily life (e.g. cleaning the house)

✓ **Broadening range**

Classic tracks are nostalgic for older (35-55) audiences, and educational for younger (16-34)

✓ **BBC credibility**

BBC looked to as authority for artist closeness and expertise

✓ **Promoting new / UK**

Supporting new and emerging UK acts seen as key benefit and aligned with BBC's PSB remit

mtm

 = unique value from being delivered by BBC



*It just ticked all my boxes, the mood bosting, I feel like that's a **must when you listen to the radio** and then you've got the biggest DJ's and partnerships as well*

Heavy/Mid, 16-18, ABC1



*Sometimes you're working away and you do just need a **mood-boosting kind of station**. If you **need high energy**, like if you're in the **gym** or something like that, you **know what you're going to get from the station**.*

Light/Non, 25-34, C2DE

*There's nothing really like that right now, when it comes to dance music. **Supporting new artists is massively important right now in the music scene***

Light/Non, 19-24, C2DE

AREAS OF CONCERN

? **Not for everyone**

For some people, dance music isn't 'for me'. Appeal is lowest among younger (16-18) and older (55+) listeners

? **Confusion over 'dance'**

'Dance music' means different things to different people – music content is therefore not immediately clear

? **Existing alternatives**

While not so well-known, dance music fans familiar with existing commercial options e.g. *Kisstory Dance Anthems*



*It's the main reason I don't listen to Radio One on a Friday night. It **doesn't interest me...** I'm definitely **not into dance music**.*

Heavy/Mid, 25-34, C2DE

*I can't stand dance music. I **can't dance**. I've never liked dance music... I'm sorry. It's just I'm not a dancer, and I **don't like dance music**.*

Heavy/Mid, 55-64, C2DE



*Yeah, no, gosh, my **clubbing days are long gone** and I had to dance to it then. I **didn't like it then either**.*

Light/Non, 35-54, ABC1

BBC's reputation for supporting new UK talent tees up expectations for distinctiveness and representation

PUBLIC PURPOSES

1. To provide impartial news and information



2. To support learning for everyone



3. To be creative and distinctive, whilst delivering high quality



4. To reflect, represent and serve everyone in the UK



REASON

No focus on news content

Potential for focus on new and classic dance music to be educational in content

Focus on exclusive mixes and partnerships feels distinctive

Showcasing grass-roots talent; making dance music more accessible for dance fans

DEVELOPMENT AREAS

N/A

Tell the story of the **history and influence** of dance music through new and classic tracks

Building on BBC's reputation for **live music, artist closeness** and **presenter expertise**

Opportunity to boost **underground live music scenes** from **around the UK**



*Yeah, I think. Well, the **main thing is the new UK artists and the exclusive**. Like, you never really hear things being given **exclusivity to a Radio station** anymore. It's **all just Spotify or, like, Apple Music**, all the streaming services. So I think that's interesting.*

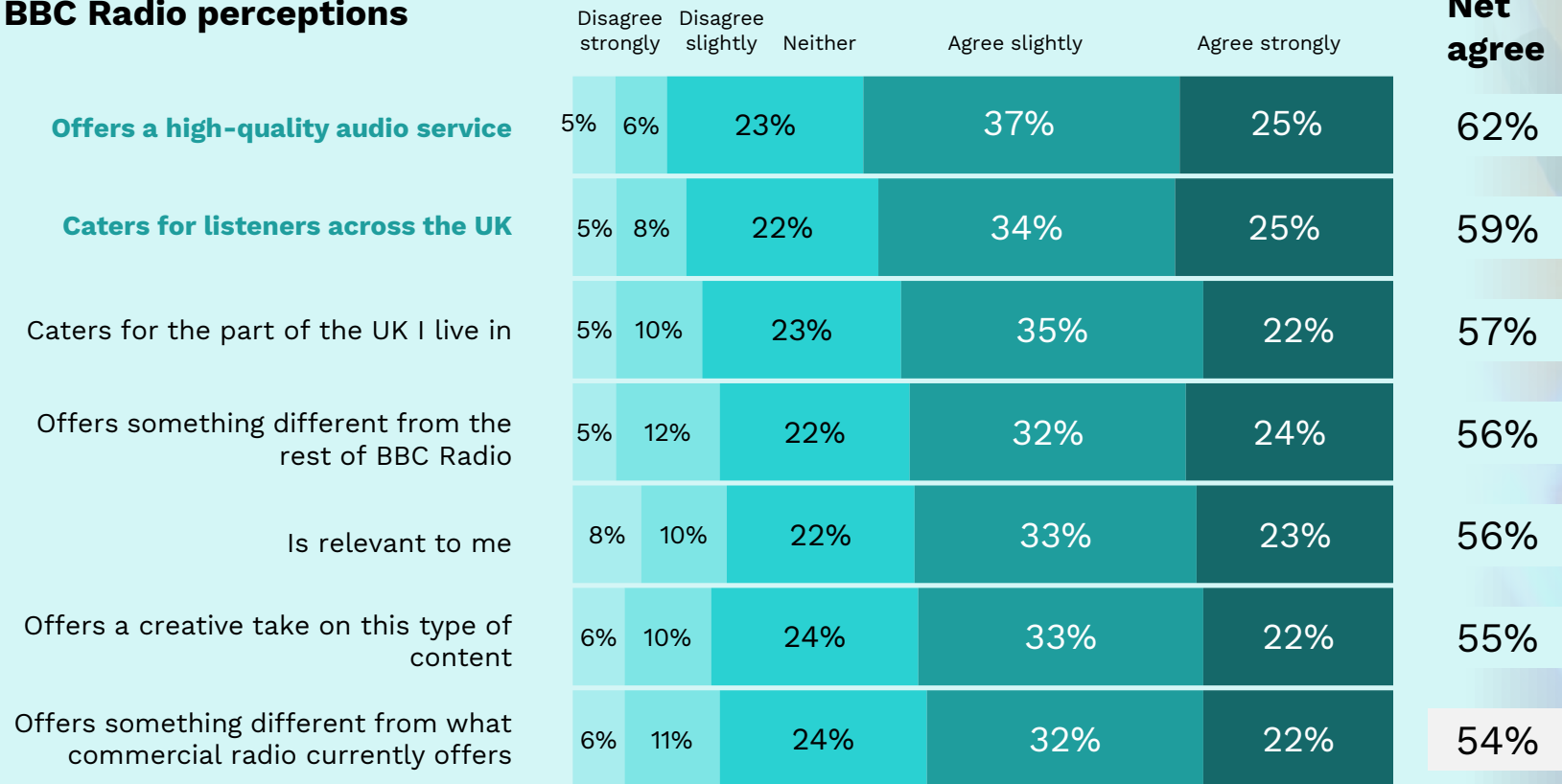
Light/Non, 19-24, C2DE

***No station that I know of** does high energy music and dance music and listening to new DJs, depending on what sort of music they played, would be good and **giving new artists a chance**.*

Light/Non, 65+, C2DE

16-34s have a positive response, with high quality and catering for all listeners, leading perceptions

TARGET AUDIENCE 16-34 BBC Radio perceptions



65%+ very positive response
Between 55-65% positive response
Under 55% less positive response

50%
Agree 'this change is a good thing for the BBC to do'

The reaction is slightly weaker among underserved audiences, and outside of 16-34s, relevance is also questioned

BBC Radio perceptions % net agreement scores

Over 65% very positive response

Between 55-65% positive response

Under 55% more negative response

	ALL LISTENERS			TARGET AUDIENCE 16-34				
	16-34	35-54	55+	C2DE	B.A.M.E	Nations	Non-BBC Listeners	Competitor listeners*
Offers a high-quality audio service	62%	60%	60%	57%	52% ↓	65%	63% ↓	69% ↑
Caters for listeners across the UK	59%	61%	62%	54%	61%	59%	56%	68% ↑
Caters for the part of the UK I live in	57%	56%	55%	53%	52%	54%	58% ↓	66% ↑
Offers something different from the rest of BBC Radio	56%	57%	52%	55%	51%	48%	51% ↓	65% ↑
Is relevant to me	56% ↑	53%	36% ↓	52%	47% ↓	56%	56% ↓	71% ↑
Offers a creative take on this type of content	55%	58% ↑	51%	53%	55%	49%	48%	64% ↑
Offers something different from what commercial radio currently offers	54% ↑	54% ↑	46% ↓	54%	51%	51%	42% ↓	65% ↑

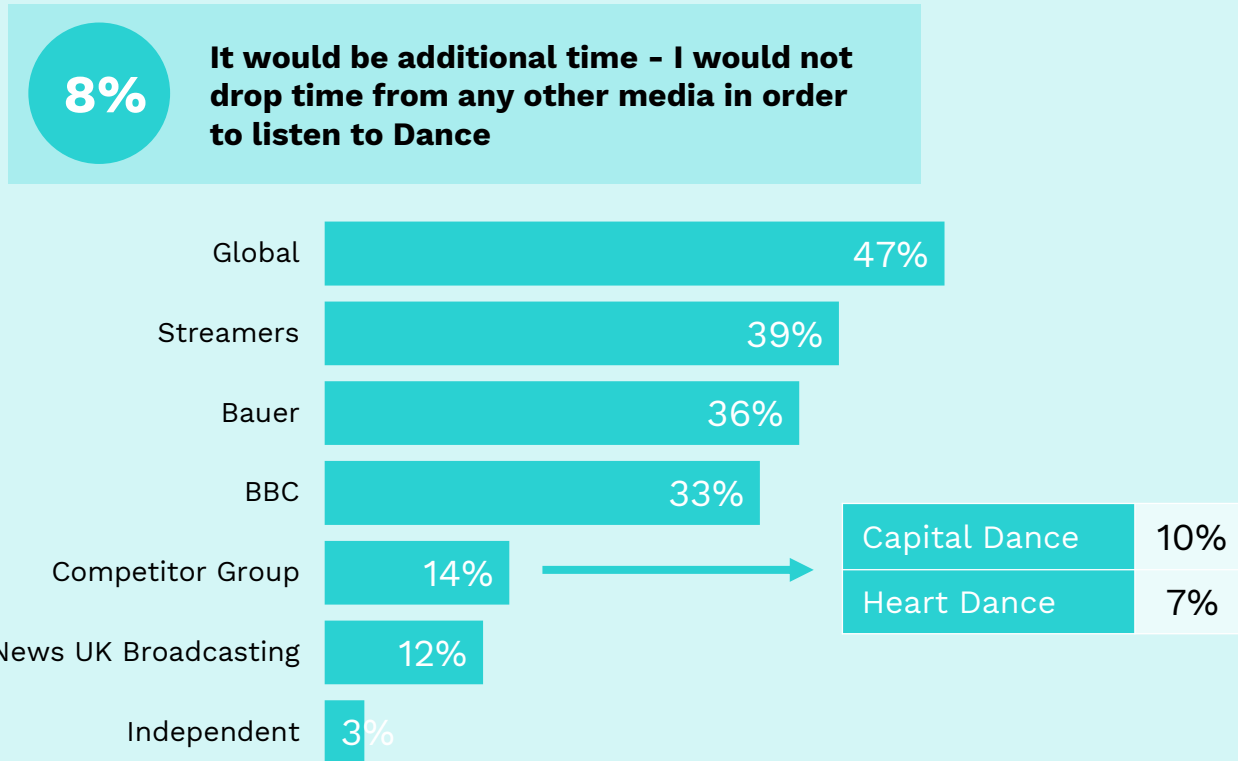
Source: MTM BBC Radio PIT quantitative analysis (Fieldwork conducted 24th Jan-1st Feb 2024)

Base: All Radio listeners n=3000, Radio listeners aged 16-34 n=799, aged 34-54 n=982, 55+ n=1,219. Radio listeners aged 16-34 who are C2DE n=390, B.A.M.E n=200, in Scotland, Wales, or Northern Ireland n=138, less than weekly listeners of BBC Radio n=252, Don't listen to BBC Radio n=101, or listen to competitor stations (Capital Dance, Heart Dance) n=378. Question D3. To what extent do you think this proposed change sounds like it does the following? D4. We are interested to know if you think the BBC should launch introduce [Dance]? After seeing the proposed change, to what extent do you agree that [Dance] this is a good thing for the BBC to do?

As with other services, most listening is likely to be taken from Spotify and the main national stations

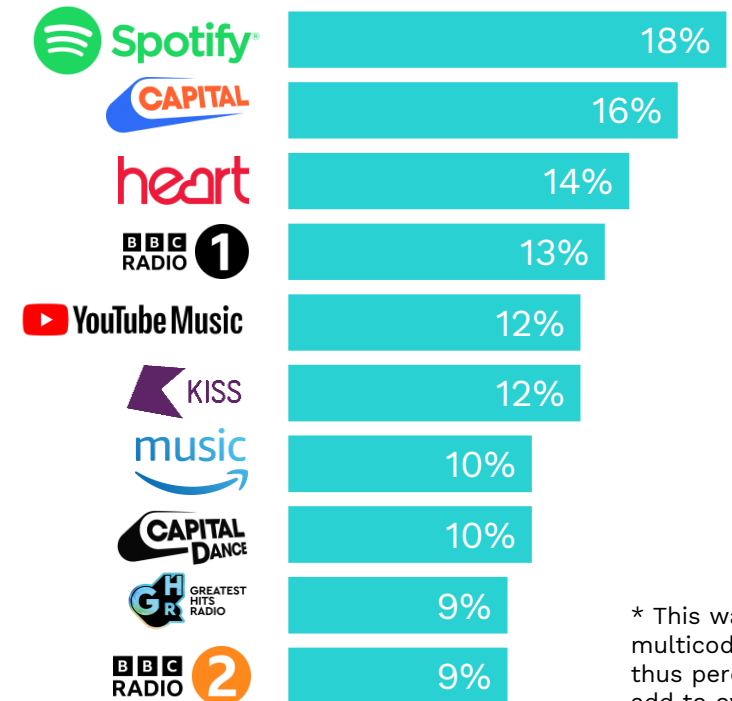
Where might listening be taken from

Respondents who say they are likely to listen to Dance
% who claim listening would come from these stations*



Top 10 places listening might be taken from

Respondents who say they are likely to listen to Dance
% who claim listening would come from these stations*



* This was a multicode question, thus percentages will add to over 100%.

Sport

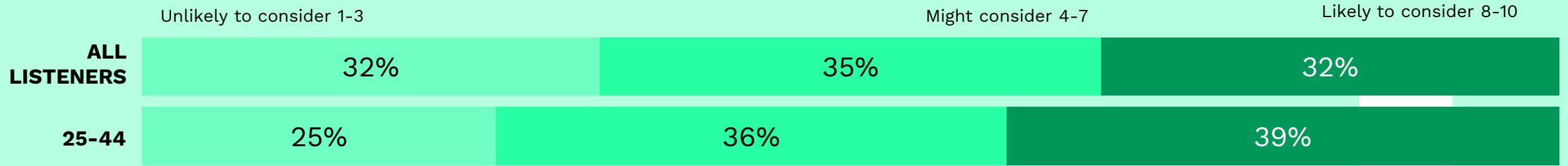
Sport



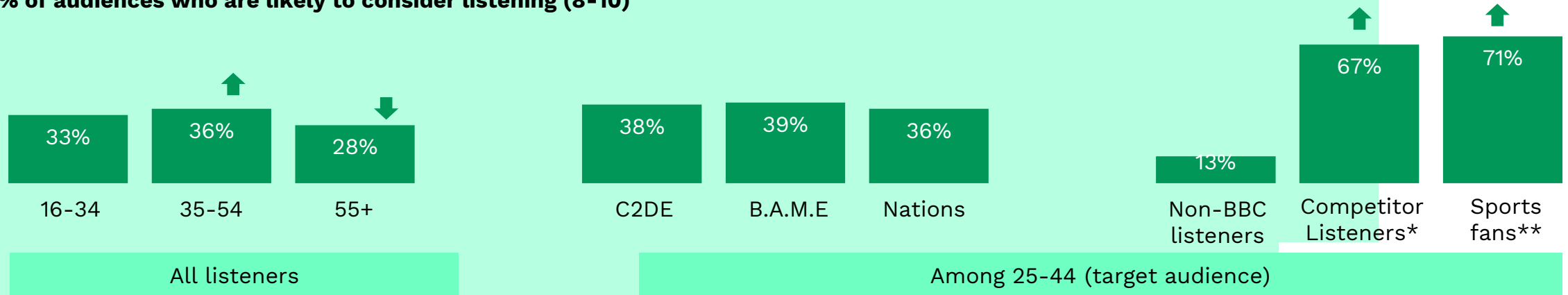
- Live sport commentaries
- Featuring a broad range of sport (e.g. Football, Cricket, Boxing, Tennis, Rugby League, Rugby Union) from across the UK
- And sport podcasts with a range of debate, analysis and entertainment

Sports fans are likely to listen to the new services, but outside of this, the reaction is more muted

Likelihood to listen to Sport (with BBC branding)



% of audiences who are likely to consider listening (8-10)



*talkSPORT, talkSPORT 2

** who listen to talkSPORT, talkSPORT2 and BBC Five Live or 5 Sports Extra

A broadened range of sports and commentary appeals to sports fans, but interest varies by sport/team

APPEALING ASPECTS

✓ **Live commentary**

Sports fans feel that the station will increase access to live commentary beyond the big games

✓ **Broadened range of sports**

Increased access to women's sports alongside less mainstream sports (e.g. netball, boxing, golf)

✓ **Podcasts**

Podcast content stands out with personal feel, access to sporting talent and behind-the-scenes stories

✓ **BBC expertise**

BBC associated with high level of talent – including current players and respected commentators

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 = unique value from being delivered by BBC



*I would want there to be coverage of netball, because there's not a lot of coverage of netball at the moment and it is a **very popular sport**. As a woman who plays a lot of sport, as long as there's **equal coverage of men and women's sports**, I'd be all for it.*

Heavy/Mid, 19-24, ABC1

*Some of the sports podcasts are presented **by active sportsmen who are competing at the moment**. It's good to hear current sportsmen talking to each other about the sport. I think you get **less of a biased approach** to it.*

Heavy/Mid, 55-64, C2DE

AREAS OF CONCERN

? **Existing alternatives**

Sports fans already enjoy the content and informal tone of talkSPORT, which is prominent in this space

? **Limited to sports fans**

Low appeal for casual sports fans outside of major tournaments - World Cup, Olympics

? **Varying interest in sports/games**

Interest in particular matches mostly confined to fans of that sport or team. Some also felt that limiting it to only UK sports would miss out on interesting global sports

? **Podcast relevance**

Concern that talking points of podcast episodes may be out-of-date vs. live news



*Well, I feel that it's **already been done**. I think **talkSPORT** and that type of station already meets that criteria... It seems quite **pointless**. That's another one to add to the mix."*

Light/Non, 65+, C2DE

*I find it slightly off-putting when you listen to a football podcast or a sporting podcast that's sort of **already out of date** because you're listening to it on Tuesday when it's really talking about things that the debate has **already been superseded by events that have taken place***

Light/Non, 35-54, ABC1

A focus on a broader range of sports and commentary will increase distinctiveness and fan engagement

PUBLIC PURPOSES

1. To provide impartial news and information

2. To support learning for everyone

3. To be creative and distinctive, whilst delivering high quality

4. To reflect, represent and serve everyone in the UK

REASON

Delivers up-to-date sporting news and events coverage

Sports commentary and podcasts expected to be informative from BBC

BBC podcasts associated with high-quality sporting talent and behind the scenes access.

Expands sporting offerings for fans of less mainstream sports and smaller leagues

DEVELOPMENT AREAS

N/A

Spotlight podcasts with **insightful analysis** as well as pure entertainment

Maintain access to top **current and former sporting talent** (seen as a key BBC strength)

Ensure coverage of **women's games** and **wide range of sports**

“

*I'm assuming that **when you say rugby and football**, that we are going to get **women's football and women's rugby** in there. It would be nice to see netball in there as well, perhaps. I sometimes do feel as though the sport coverage, well, for just about everything, is very **heavily male-biased**. So, yeah, be nice to see some **female sport** in there.*

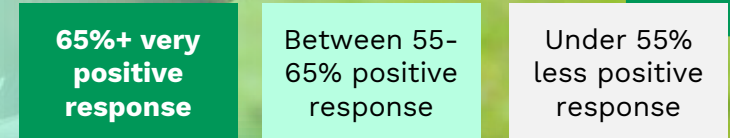
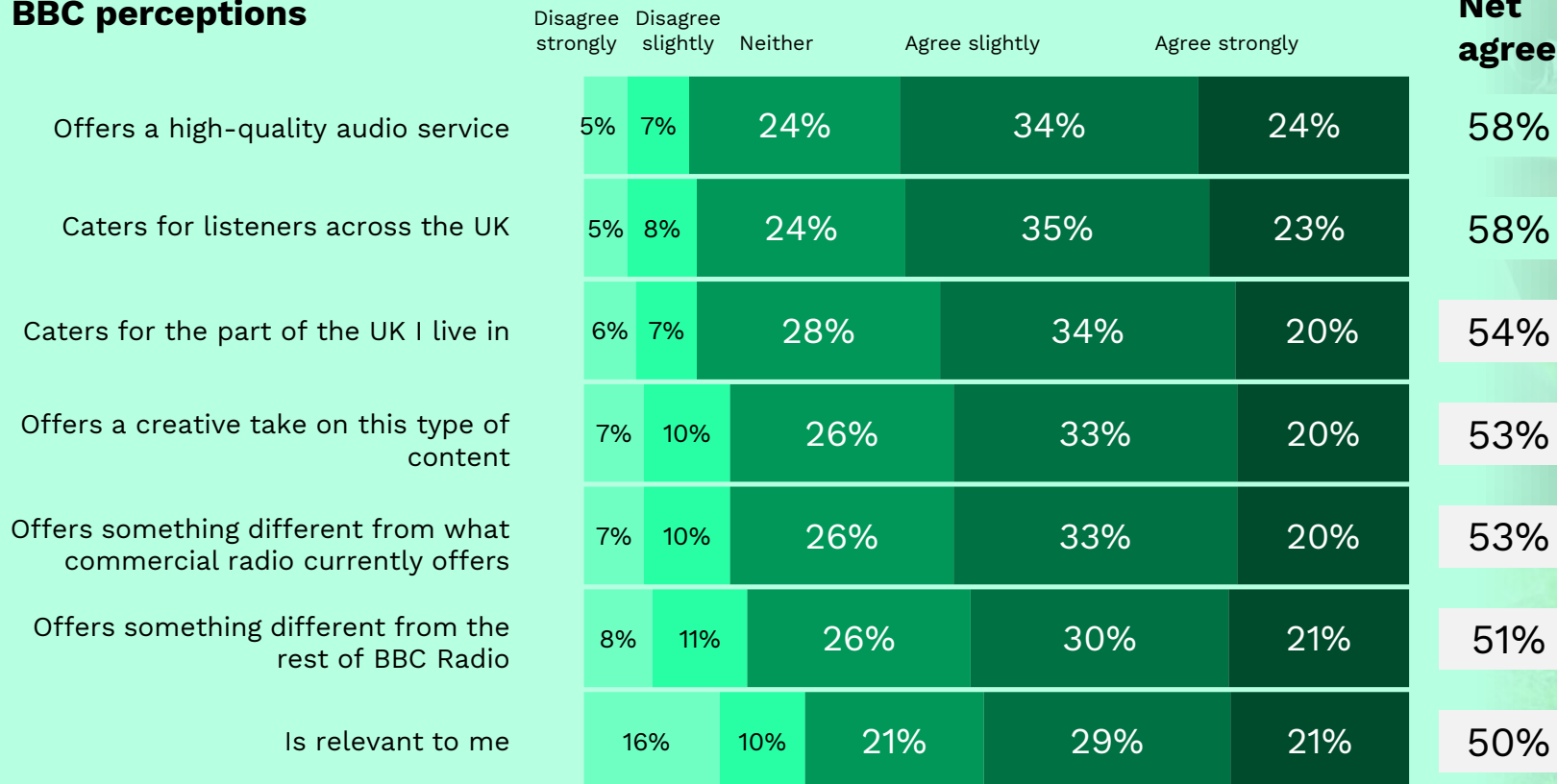
Heavy/Mid, 55-64, C2DE

*We support **Leeds United** and when we listen to Radio Leeds, when Leeds are playing, it **kind of cuts off**. So for me, as long as it's not just Premiership, as long as it is **Championship**, so that we can listen to Leeds live.*

Heavy/Mid, 65+, ABC1

Within the target audience there is a degree of scepticism around relevance and distinctiveness

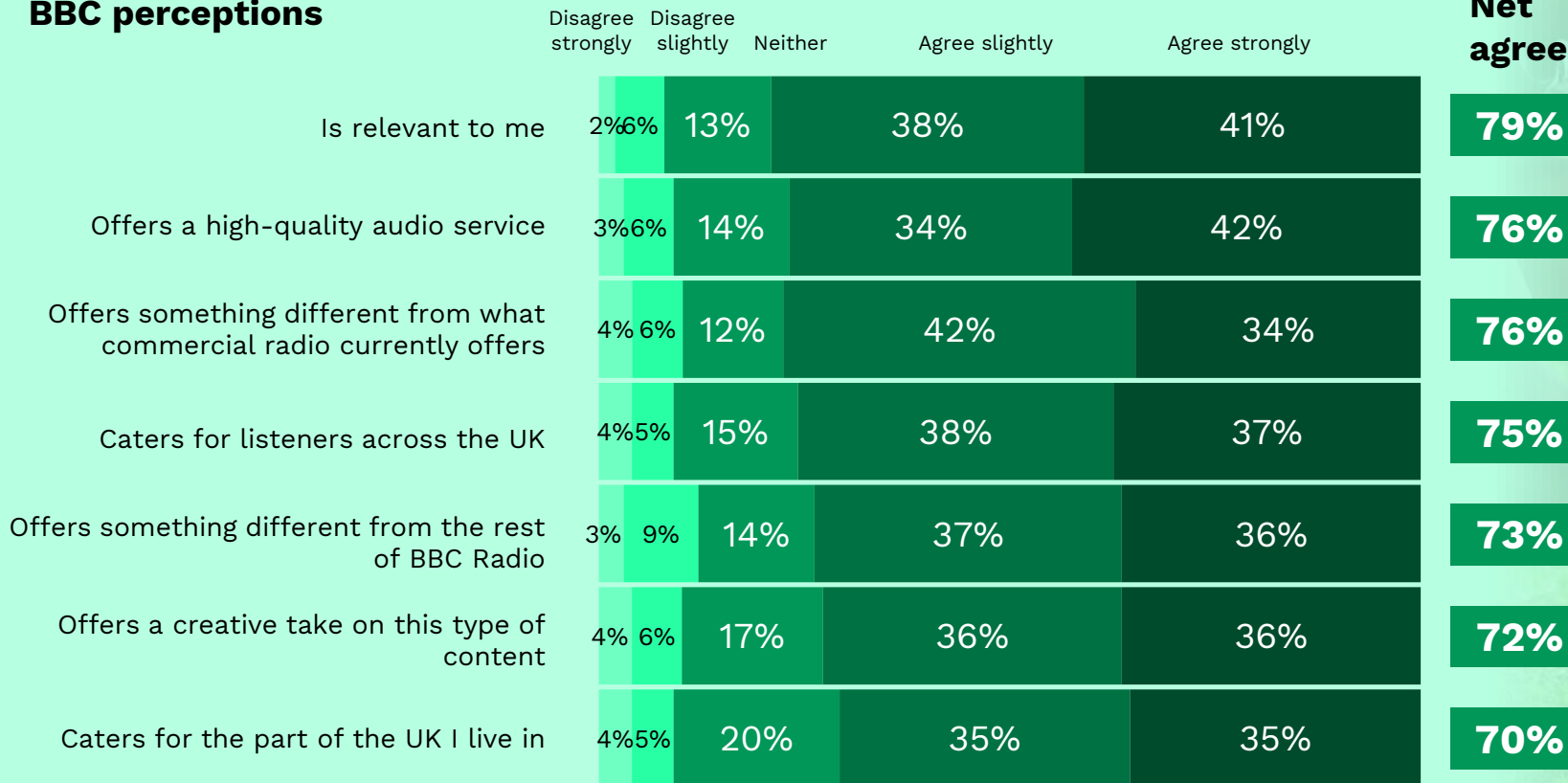
TARGET AUDIENCE 25-44 BBC perceptions



46%
Agree 'this change is a good thing for the BBC to do'

However, sports fans are very positive – and feel it would offer something different to commercial radio

25-44 SPORTS FANS LISTENING TO talkSPORT, talkSPORT2 or BBC Five Live or 5 Sports Extra BBC perceptions



65%+ very positive response
Between 55-65% positive response
Under 55% less positive response

74%
Agree 'this change is a good thing for the BBC to do'

We also see this among listeners to talkSPORT, although relevance and distinctiveness are questioned by others

BBC Radio perceptions
% net agreement scores

Over 65% very positive response

Between 55-65% positive response

Under 55% less positive response

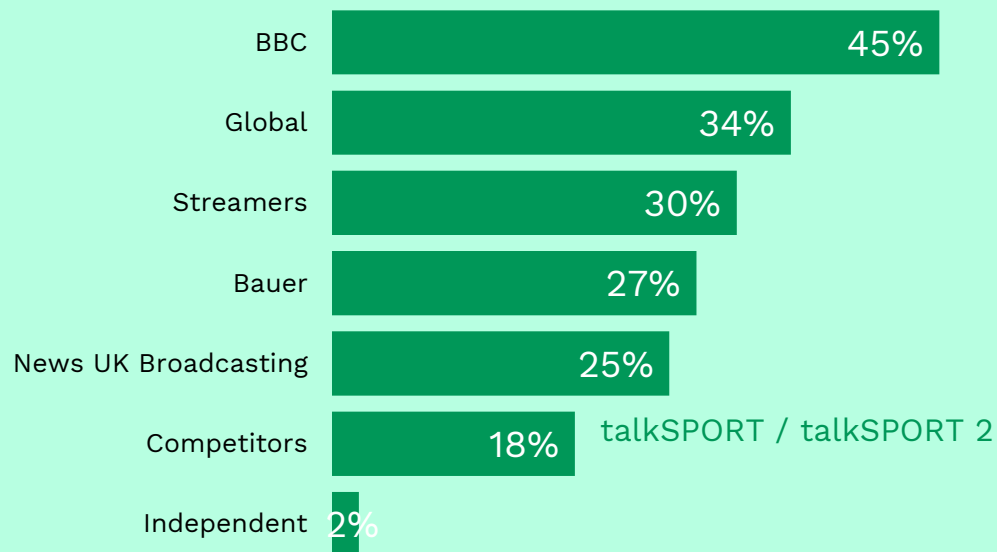
	ALL LISTENERS			TARGET AUDIENCE 25-44				
	16-34	35-54	55+	C2DE	B.A.M.E	Nations	Non-BBC Listeners	Competitor listeners*
Offers a high-quality audio service	54% ↓	60%	61%	56%	56%	50% ↓	45% ↓	73% ↑
Caters for listeners across the UK	57%	58%	64% ↑	56%	58%	50% ↓	38% ↓	74% ↑
Caters for the part of the UK I live in	55%	53%	58%	51%	53%	49%	40% ↓	70% ↑
Offers a creative take on this type of content	51%	50%	50%	50%	57%	46%	33% ↓	70% ↑
Offers something different from what commercial radio currently offers	51%	50%	46%	51%	58%	49%	34% ↓	72% ↑
Offers something different from the rest of BBC Radio	49%	49%	49%	51%	50%	45%	32% ↓	71% ↑
Is relevant to me	48%	47%	43%	47%	50%	45%	24% ↓	76% ↑

Most listening is likely to come from Radio 5 Live / 5 Sports Extra and talkSPORT

Where might listening be taken from

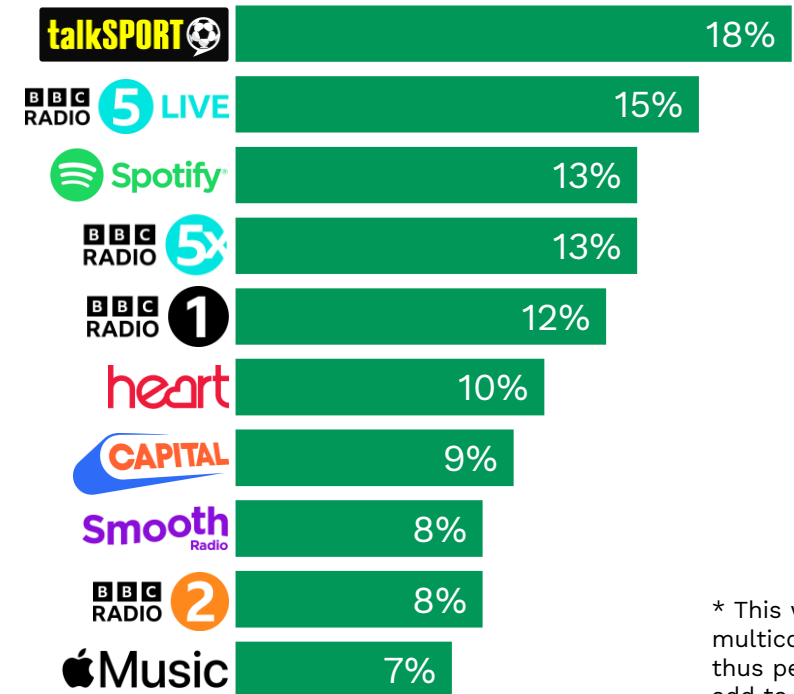
Respondents who say they are likely to listen to Sport
% who claim listening would come from these stations*

9% It would be additional time - I would not drop time from any other media in order to listen to Sport



Top 10 places listening might be taken from

Respondents who say they are likely to listen to Sport
% who claim listening would come from these stations*

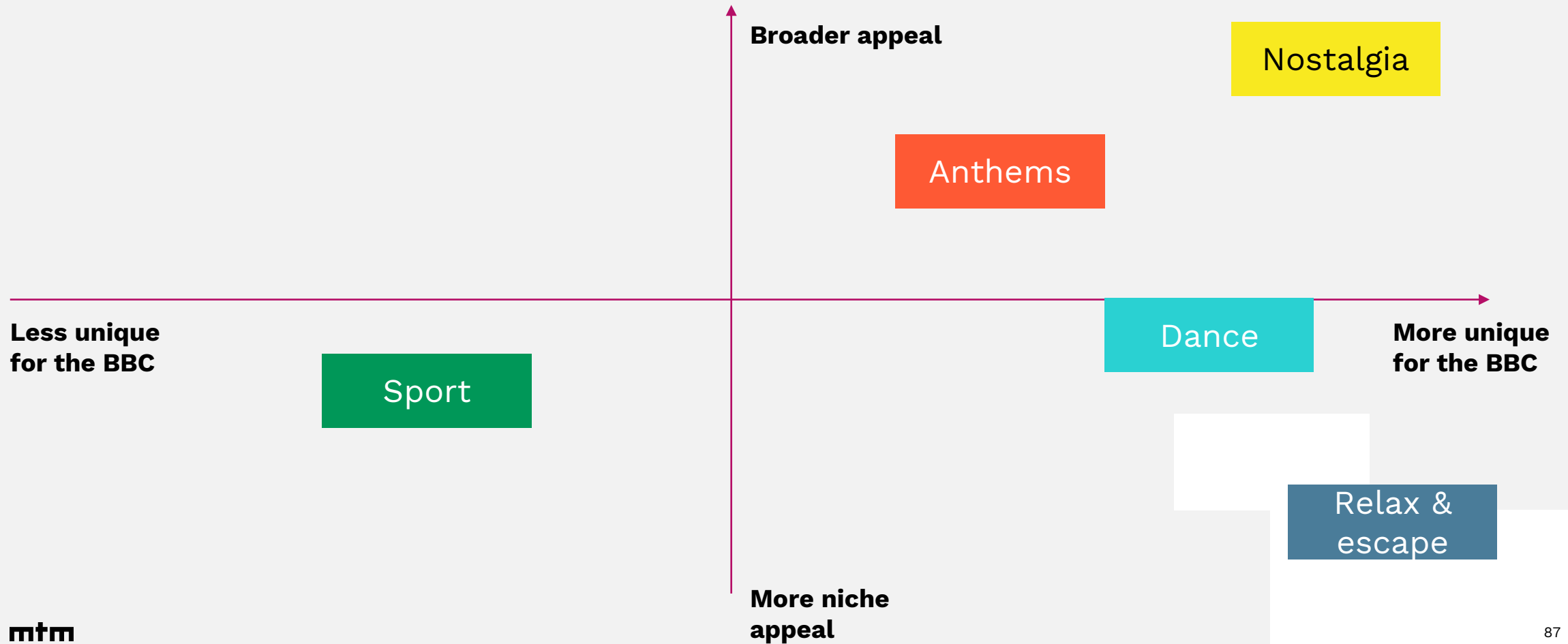


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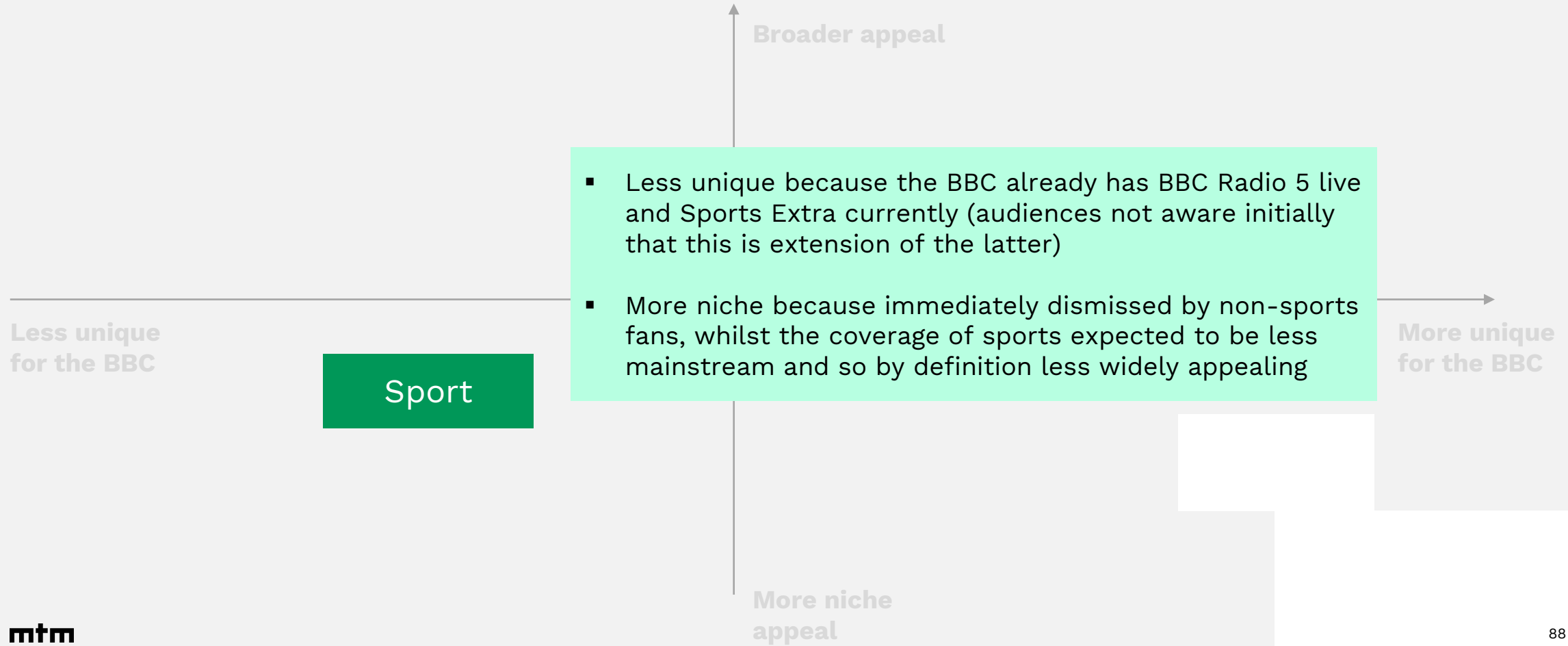
What difference could each of the proposed stations make to the BBC audio portfolio / offer?



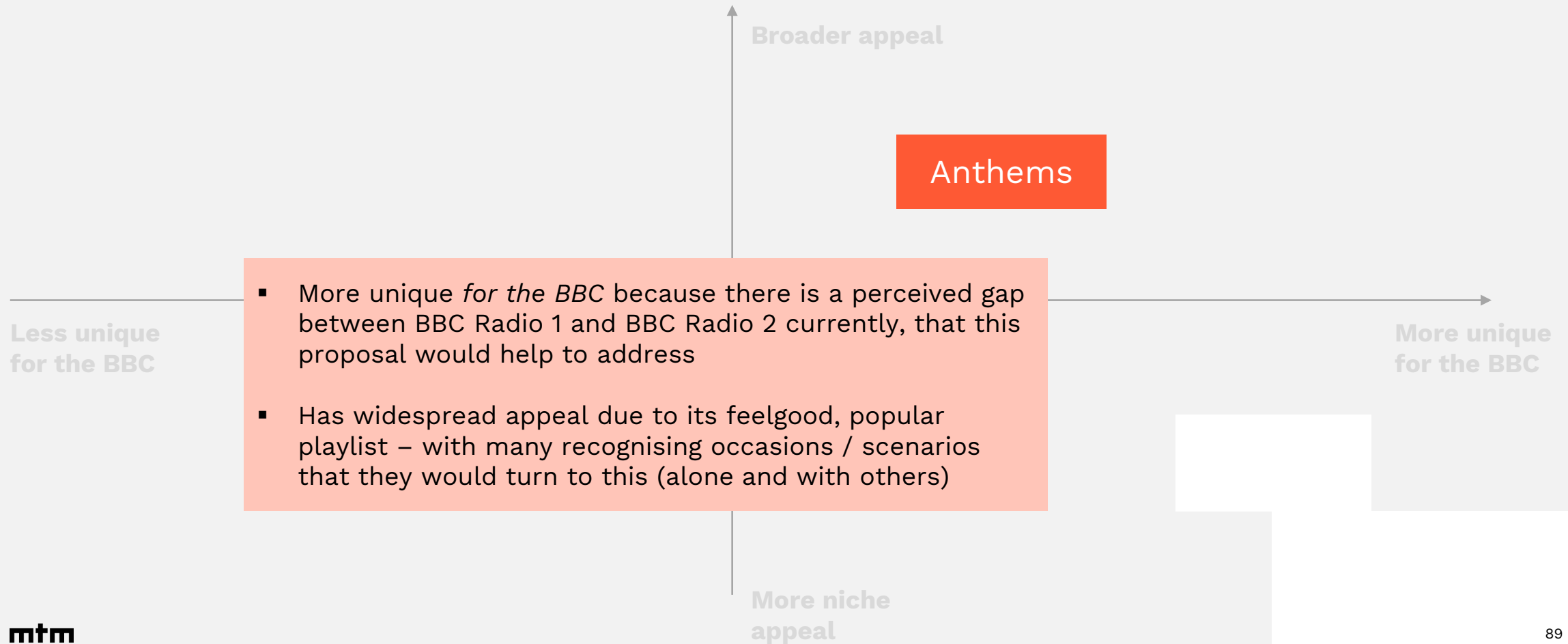
Where the proposals sit relative to audience appeal and how unique they are for the BBC



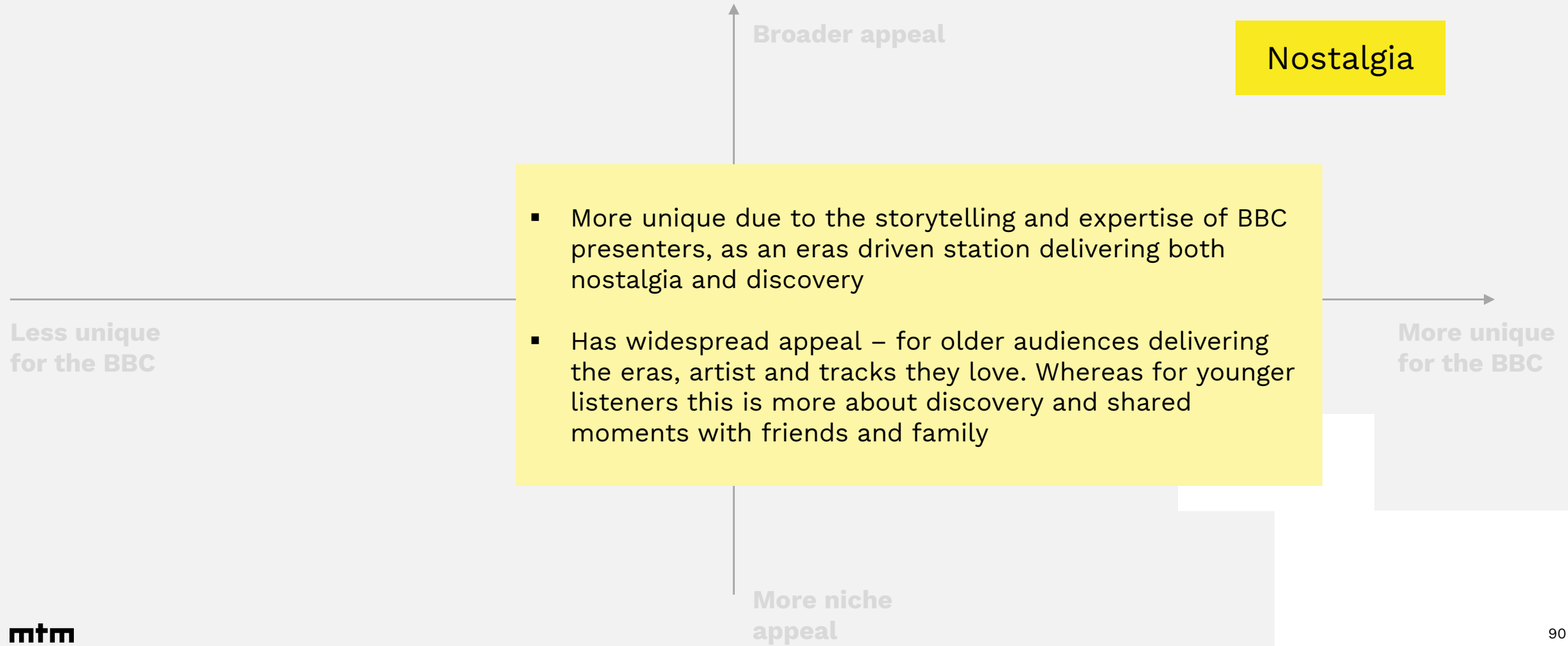
Where the proposals sit relative to audience appeal and how unique they are for the BBC: **Sport**



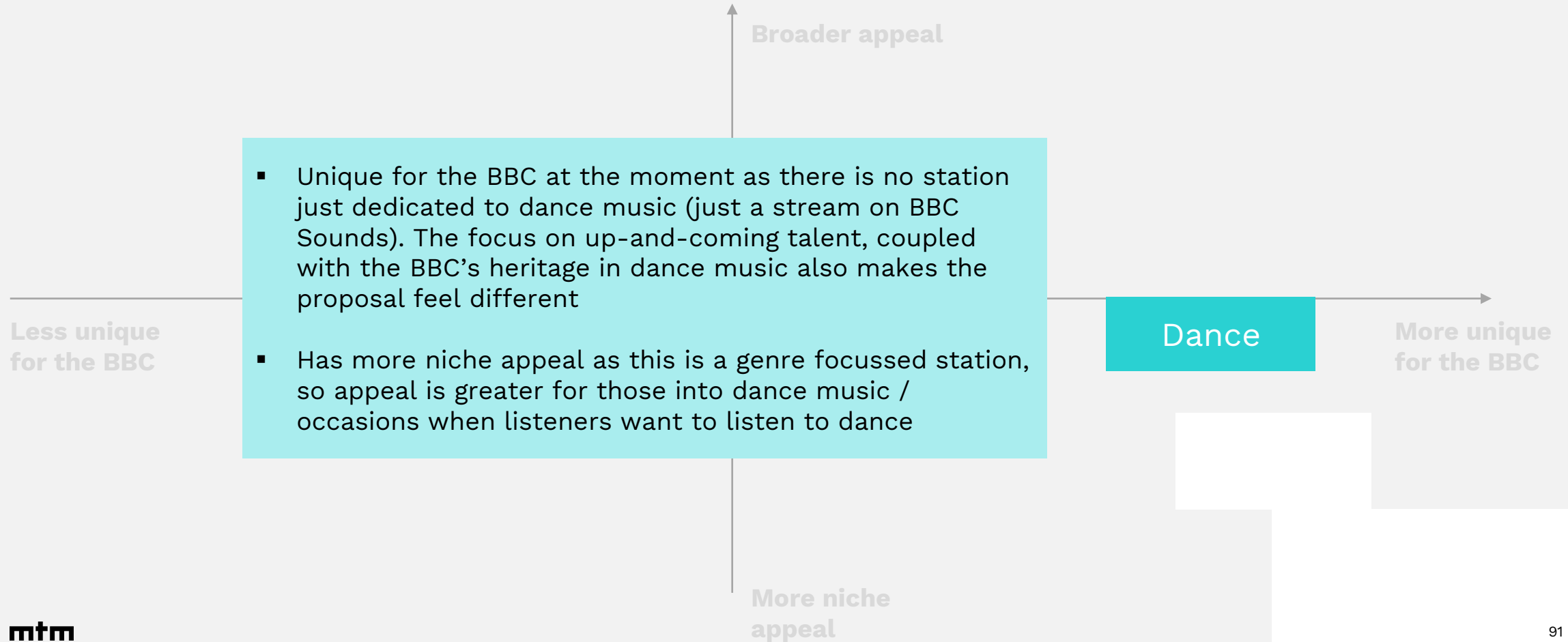
Where the proposals sit relative to audience appeal and how unique they are for the BBC: **Anthems**



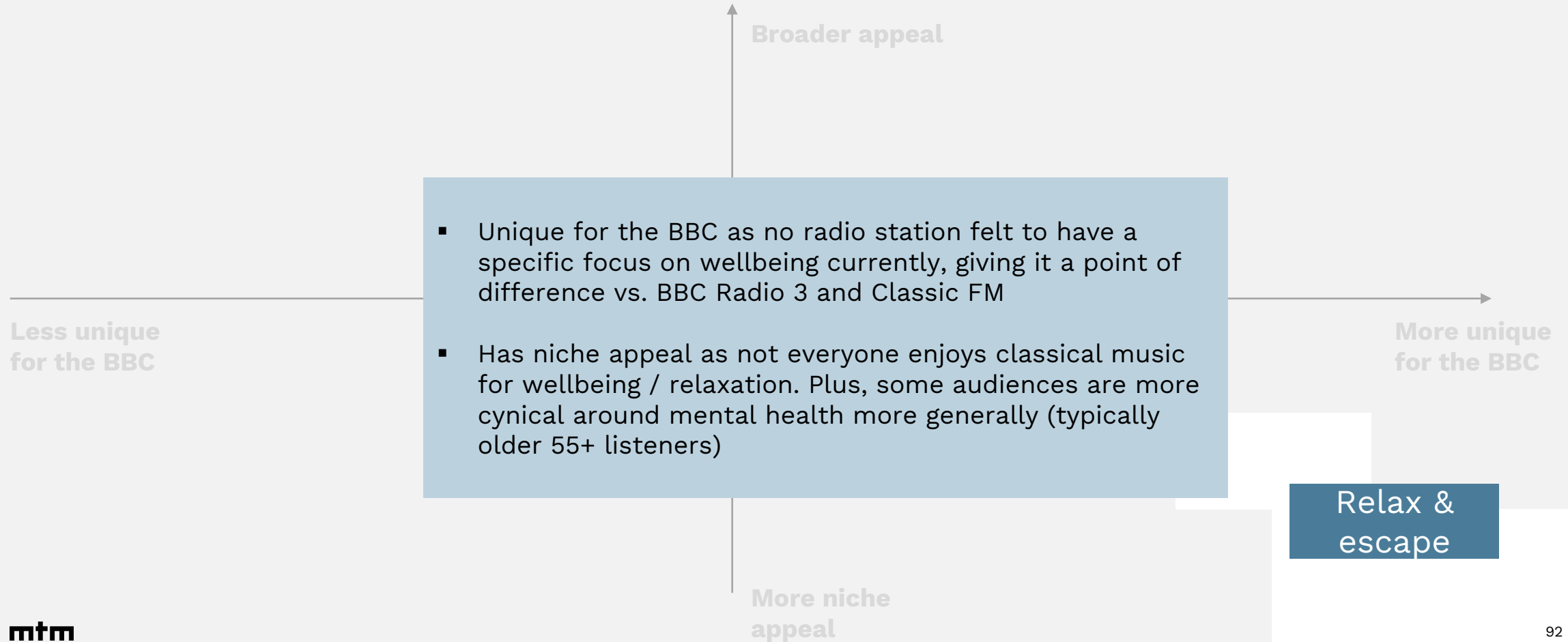
Where the proposals sit relative to audience appeal and how unique they are for the BBC: **Nostalgia**



Where the proposals sit relative to audience appeal and how unique they are for the BBC: **Dance**



Where the proposals sit relative to audience appeal and how unique they are for the BBC: **Relax and escape**



Final thoughts



This research has shown that the BBC's proposals to introduce the new audio services are in the public's interest

Personal interest

The new audio services proposed by the BBC will provide more opportunities for people to listen. **3 in 4 are more likely to listen to or explore BBC Radio content** if they were launched.

Among their target audiences, **Nostalgia, Anthems and Dance** were well received, with likelihood to listen scores of 48%, 47% and 43%. Relax and Sport are slightly behind at 36% and 39%, respectively – see slide 82 for further details.

The new services will broaden the appeal of BBC Radio. **72% agree that BBC Radio has something for them**, a 10-percentage point increase from before they saw the services. Additionally, **75% agree that BBC Radio has a wide range of music to choose from**, a 7pp increase.

Both statements show **significant increases among all respondents and for many underserved audiences, including non-BBC listeners.**

Favourability towards BBC Radio would also significantly increase, with over 50% of respondents having a favourable impression after seeing the new services. We also see a significant increase in favourability **among underserved audiences and non-BBC listeners.**

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The proposals will help to address some of the negative perceptions that exist around the existing BBC Radio portfolio



“ I would definitely listen to the BBC Sounds app more with those stations on it, just because **it would increase the offering they have on there**

Light/Non, 35-54, ABC1



“ **They've got to keep up with the times and changes are needed**, I don't even know how many stations there are, Radio 6 I know nothing about, Radio 3 I never listen to

Heavy/Mid, 55-64, ABC1



“ I think it's good for the BBC...**It's something they probably needed to do and they're doing it, it's great**

Heavy/Mid, 35-54, C2DE



“ All 5 stations are trying to be slightly diverse and different to what's in the market, while also **plugging gaps in the current BBC scheduling**

Heavy/Mid, 35-54, ABC1

The proposals will help to address some of the negative perceptions that exist around the existing BBC portfolio



The new stations will push the BBC portfolio closer toward the breadth and variety offered in commercial radio, providing greater parity than currently. They will offer listeners greater choice in how and where they engage with BBC Radio stations and a greater chance that they will discover new stations and new music through the BBC.



Stations with a more specific focus (either on era / genre / mood) will provide greater parity and drive increased discovery / consideration of BBC Radio when listeners are looking for a more guaranteed experience, where currently commercial radio is stronger.

This will ensure the BBC delivers on both serendipity (through Radio 1, 2, 3 etc.) and more guaranteed experiences through the proposed stations.



The proposed changes will bring the BBC more in-line with audience needs / expectations of the market. Listeners want to choose their experience and the current approach of BBC Radio 1, 2, 3 etc. alone does not deliver this against these needs.

The proposed stations will ensure the BBC remains relevant and as an option in the minds of listeners.



Expanding and investing in the portfolio indicates the BBC is willing to adapt and invest in its offer. This will challenge the view that the BBC is 'old radio' and instead is more relevant, continuing to cater to a wide range of listeners, through a portfolio that provides to a range of tastes, moods and moments. Bringing it more in line with the current radio landscape.

This research has shown that the BBC's proposals to introduce the new audio services are in the public's interest

Societal interest

We see a positive level of societal impact across all audiences.

- **74% agree that BBC Radio has something for everyone**, a significant 8-percentage point increase from before they saw the services.
- **72% agree that BBC Radio caters for listeners across the UK**, a significant 3pp increase.
- **61% agree that BBC Radio offers something different to commercial radio**, a significant 7pp increase.

The new services will also help to improve perceptions among underserved audiences. For example, we see **significant increases for BBC Radio having something for everyone among C2DE (+9pp) and B.A.M.E audiences (+11pp)**.

Among **non-BBC listeners, we also see significant increases** for all the above statements (something for everyone +20pp, high-quality audio service +14pp, different to commercial radio +12pp)

Qualitatively, some of the proposed stations are felt to be more creative and more distinctive than others, which makes them feel like a stronger addition to the radio landscape as well as helping to plug some of the gaps in the current BBC portfolio

Nostalgia



- Broad appeal, with 'nostalgia' for older listeners and 'discovery' for younger ones
- While the era's covered are undoubtedly popular, they are also well-catered for

Anthems



- Positivity and interest in a 'BBC take' on this kind of radio station
- Currently lacking points of difference vs. commercial versions however

Relax & escape



- Focus on wellbeing / mindfulness is unique in radio and offers something new
- Potential to occupy a space that neither Radio 3 or Classic FM currently own

Dance



- Focus on 'dance' genre fills a perceived gap in major BBC radio station provision
- UK-lense and supporting emerging talent also unique and well-aligned to BBC

Sport



- Initially struggles to serve a need, with *5 Live* and *talkSPORT* felt to be sufficient
- A BBC station dedicated purely to sport makes sense within the existing portfolio

This research has shown that the BBC's proposals to introduce the new audio services are in the public's interest

Impact

We see a positive reaction towards **Nostalgia**, with 48% likely to listen among the target audience (55+). It equally appeals to underserved audiences within this demographic.

Anthems again positive, with 47% likely to listen among 16-34s (the target audience) and 46% among 35-54s.

Comparatively, we see weaker consideration scores for Relax. **However, it appeals more to B.A.M.E audiences (45% likely to listen within the target age group)** who see it as offering something different. It is also very popular among classical music fans.

Dance does well among the target audience 16-34s (**43% likelihood to listen**), but it is more polarising among older audiences.

Overall, we saw a **more muted reaction to Sport**, with 39% likely to listen among 25-44s with many questioning relevance and distinctiveness. However, the service is very popular among sports fans.

Across all services (except Sport), listening will **most likely come from Spotify**, followed by the national commercial and BBC Radio stations.

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The proposed new stations are a welcome addition to the UK radio landscape and help to develop / modernise the BBC Radio portfolio. The execution of each station will be crucial in offering something distinct from commercial radio

Nostalgia

- Dial up the 'stories behind the songs' aspect to feel most differentiated
- Selecting passionate and expert presenters will be key to doing this successfully
- Opportunity to bring in 'experts' or 'guest contributors' to add to the stories

Anthems

- Emphasise the impact the songs had in their day and their influence on music
- Opportunity to tap into 'BBC Radio archive' e.g. Live Lounge to elevate the offer
- Potential for deep-dives into different sub-genres / sub-eras

Relax & escape

- Dial up the wellbeing / mindfulness aspects as the key point of difference
- The station should promise an 'accompanied wind-down' provided by the host
- Opportunity to link listeners into related OD content e.g. 'Wind down curation'

Dance

- Blending cutting-edge dance music with some 'classics' will ensure broad appeal
- Competitions / activations around 'UK-talent' to signpost this part of the offer
- Highlight previous talent who got their break on BBC Radio and bring them in

Sport

- Potential to be more additive if focused on women's sport or underserved sports
- Or underserved areas of existing coverage e.g. football below the Premier League
- Curation of the best presenters possible will be key in providing a USP

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Appendix: Image source library

The following images are not owned by MTM, we use sources that are free of charge but do not own the IP on these images. The image sources are as follows:

Title slide: Pexels - [Woman in Gray Tank Top Lying on Bed](#)

Slide 2: Image 1 Pexels - [Set of retro vinyl records on table](#)

Slide 2: Image 2 Pexels - [Smiling Man Standing and Dancing Near Smiling Woman Surrounded With People](#)

Slide 2: Image 3 Pexels - [Woman Relaxing with Cup of Coffee on Rooftop](#)

Slide 2: Image 4 Pexels - [People Dancing on the Music](#)

Slide 2: Image 5 Pexels - [Man Preparing Ball at Rugby Game](#)

Slide 8: Pexels - [Photo of Woman Sitting on Sofa](#)

Slide 9: Image 1 Unsplash - [Condenser Microphone with Black Background](#)

Slide 9: Image 2 Unsplash - [A Colourful Umbrella Sitting on Top of a Solar Panel](#)

Slide 9: Image 3 Unsplash - [Shallow Focus Photography of Red Apples](#)

Slide 9: Image 4 Unsplash - [Tarot cards from the Rider Waite Tarot deck](#)

Slide 9: Image 5 Unsplash - [Water Ripple](#)

Slide 9: Image 6 Unsplash - [Group of People Running in Stadium](#)

Slide 14: Unsplash - [Keith Pitts](#)

Slide 15: Unsplash - [Tarun Savvy](#)

Slides 19, 20: Image 1 Pexels - [Set of retro vinyl records on table](#)

Slides 19, 20: Image 2 Pexels - [Smiling Man Standing and Dancing Near Smiling Woman Surrounded With People](#)

Slides 19, 20: Image 3 Pexels - [Woman Relaxing with Cup of Coffee on Rooftop](#)

Slides 19, 20: Image 4 Pexels - [People Dancing on the Music](#)

Slides 19, 20: Image 5 Pexels - [Man Preparing Ball at Rugby Game](#)

Slides 24, 25, 26: Image 1 Unsplash - [Assorted Color Leaf Hanging Decor](#)

Slides 24, 25, 26: Image 2 Unsplash - [Man in Front of Vending Machines](#)

Slides 24, 25, 26: Image 3 Unsplash - [Black and Gray Microphone with Stand](#)

Slides 24, 25, 26: Image 4 Unsplash - [The Red One](#)

Slides 27, 28: Image 1 Unsplash - [Photo of Teal Stadium Seats](#)

Slides 27, 28: Image 2 Unsplash - [Photography of Condenser Microphone](#)

Slides 27, 28: Image 3 Unsplash - [The Word New on a Red Brick Wall](#)

Slides 27, 28: Image 4 Unsplash - [Person Showing Handcuff](#)

Slide 29: Pexels - [A Woman Listening on Her Headphones while Packing](#)

Slide 41: Pexels - [Man Dancing in Living Room](#)

Slide 48: Pexels - [Serious student reading document with homework in park](#)

Slides 49, 51, 52, 53: Pexels - [Set of retro vinyl records on table](#)

Slides 56, 58, 59, 60: Pexels - [Smiling Man Standing and Dancing Near Smiling Woman Surrounded With People](#)

Slides 63, 65, 66, 67, 68: Pexels - [Woman Relaxing with Cup of Coffee on Rooftop](#)

Slides 71, 73, 74, 75: Pexels - [People Dancing on the Music](#)

Slides 78, 81, 82, 83: Pexels - [Man Preparing Ball at Rugby Game](#)

Slide 86: Pexels - [Woman In White Tank Top Holding White Earbuds](#)

Slide 93: Pexels - [Close-Up Photograph of a Woman with Curly Hair Listening to Music](#)

Slides 94, 95: Image 1 Unsplash - [Shallow Focus Photography of Red Apples](#)

Slides 94, 95: Image 2 Unsplash - [Tarot cards from the Rider Waite Tarot deck](#)

Slides 94, 95: Image 3 Unsplash - [Water Ripple](#)

Slides 94, 95: Image 4 Unsplash - [Group of People Running in Stadium](#)