

Radio 3 Audience Research

The following is based on the latest RAJAR information (some of which is available to the public at www.rajar.co.uk). The greater detail available in this report is taken from analysis tools available in many advertising agencies, research companies and other media owners, including all the major commercial radio groups. Nothing presented here is exclusive to the BBC.

RAJAR is the joint industry body jointly owned by the BBC and Commercial Radio. It measures radio listening through diaries that are placed with over 130,000 people a year.

It's worth noting that the methodology of RAJAR changed at the beginning of 1999 making strict comparisons with data before that date inaccurate. Prior to RAJAR starting at the end of 1992, the BBC used their own measurement system.

For the purposes of this document, I've concentrated on more recent years for which full RAJAR is available.

Note that all the information here is based on Adults 15+ (the age at which RAJAR defines an adult). There obviously are child listeners (71,000 at the latest count), but I've excluded them from this document.

Definitions

The following are definitions of some of the terms used, as listed on the RAJAR website.

Total Survey Area (TSA)

The area within which a station's audience is measured.

Population

The number of people aged 15+ who live within the TSA of a given station.

Weekly Reach

The number of people aged 15+ who tune to a radio station within at least 1 quarter-hour period over the course of a week. Respondents are instructed to fill in a quarter-hour only if they have listened to the station for at least 5 minutes within that quarter-hour. Between 24.00-06.00, listening is recorded in half-hour periods.

Weekly Reach %

The Weekly Reach expressed as a percentage of the Population within the TSA.

Total Weekly Hours

The total number of hours that a station is listened to over the course of a week. This is the sum of all quarter-hours for all listeners.

Average Hours

The average length of time that listeners to a station spend with the station. This is calculated by dividing the Weekly Hours by the Weekly Reach.

Long Term Trends

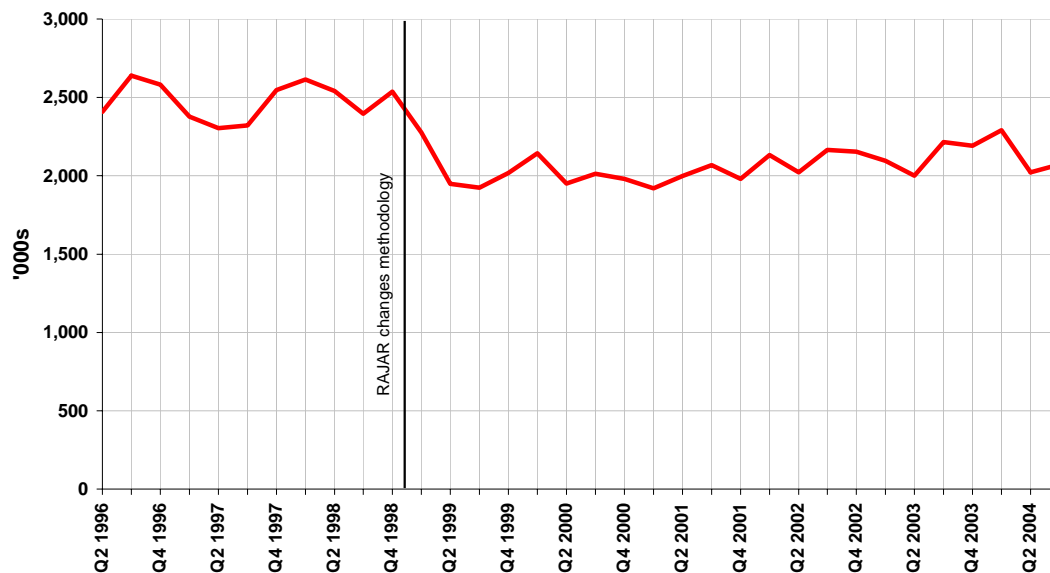
The current weekly reach for Q3 2004 (21 June – 12 September) for Radio 3 is 2.072m representing a 2.5% increase on the previous quarter, and the weekly hours are 11.965m, a 0.9% decrease on the previous quarter.

Year on year, these figures represent a 6.4% fall in reach terms and a 2.9% fall in hours.

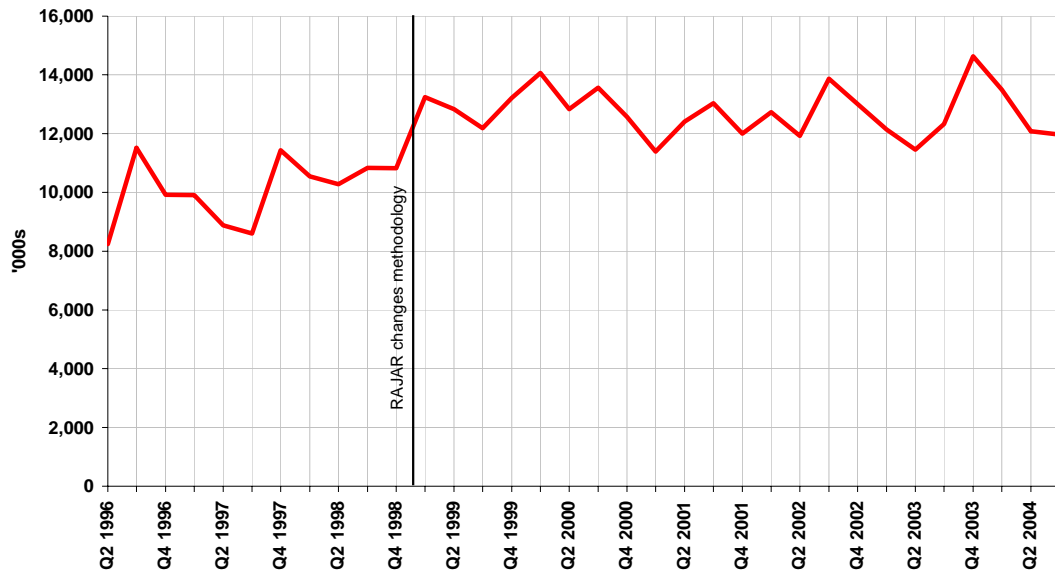
Over the course of a month, the reach of Radio 3 increases to 3.464m, and over a full quarter it reaches 4.699m different adults.

As the charts below shows, since the change of methodology at the end of the nineties, Radio 3's reach and hours have been very consistent, with the reach rarely falling below 2m and hours drifting between 12m and 14m over the period.

Radio 3 Reach

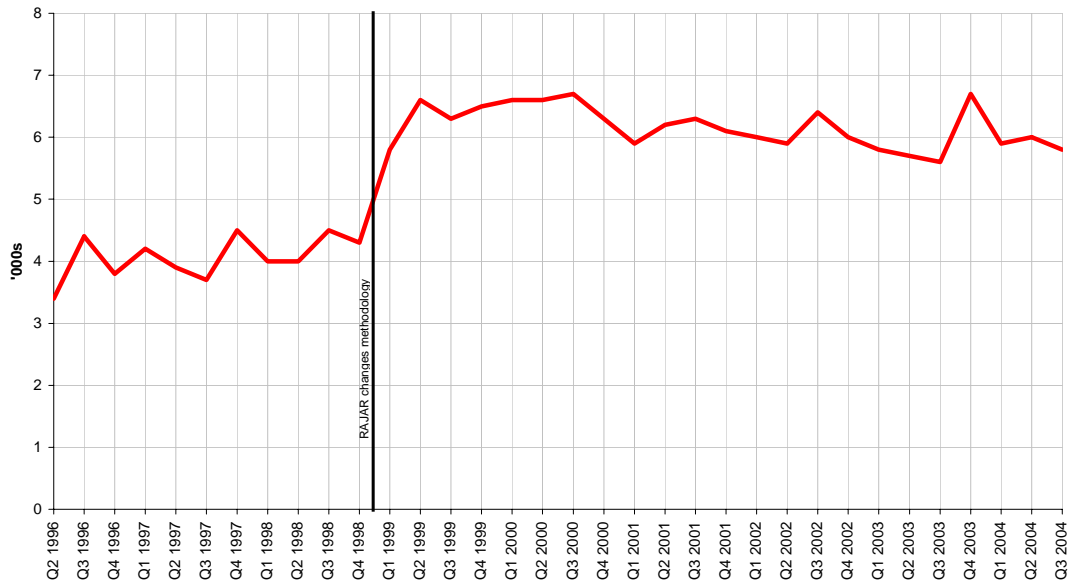


Radio 3 Hours



The “average” Radio 3 listener listens for a fairly consistent 6 hours a week, although the average hours obviously disguise those who listen for relatively short periods of times, and the smaller number who consumer many hours of Radio 3 a week.

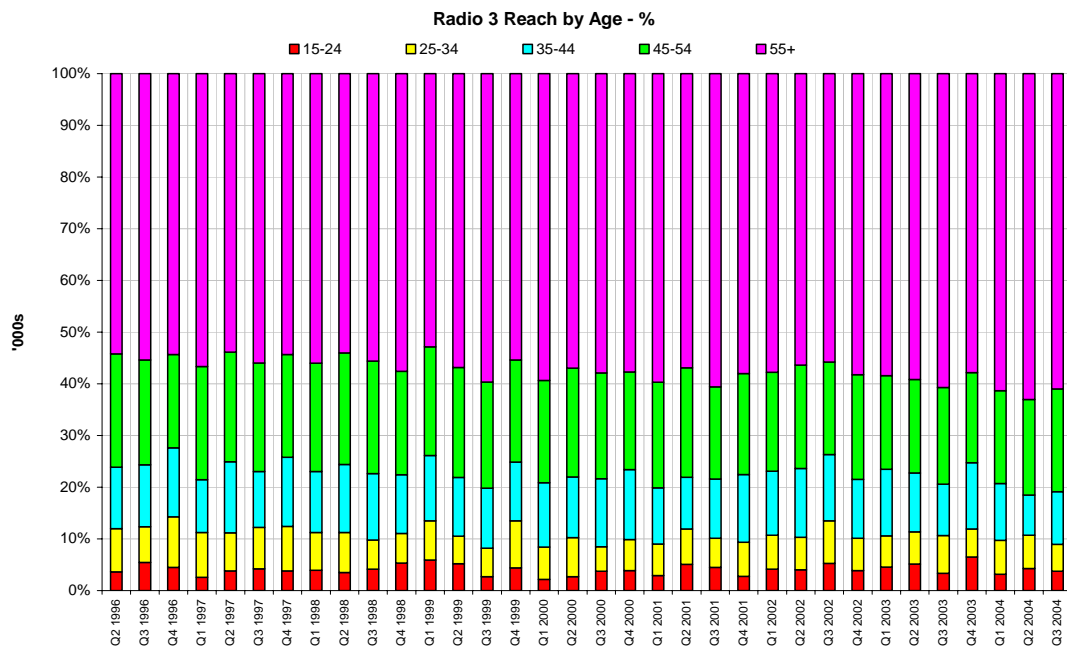
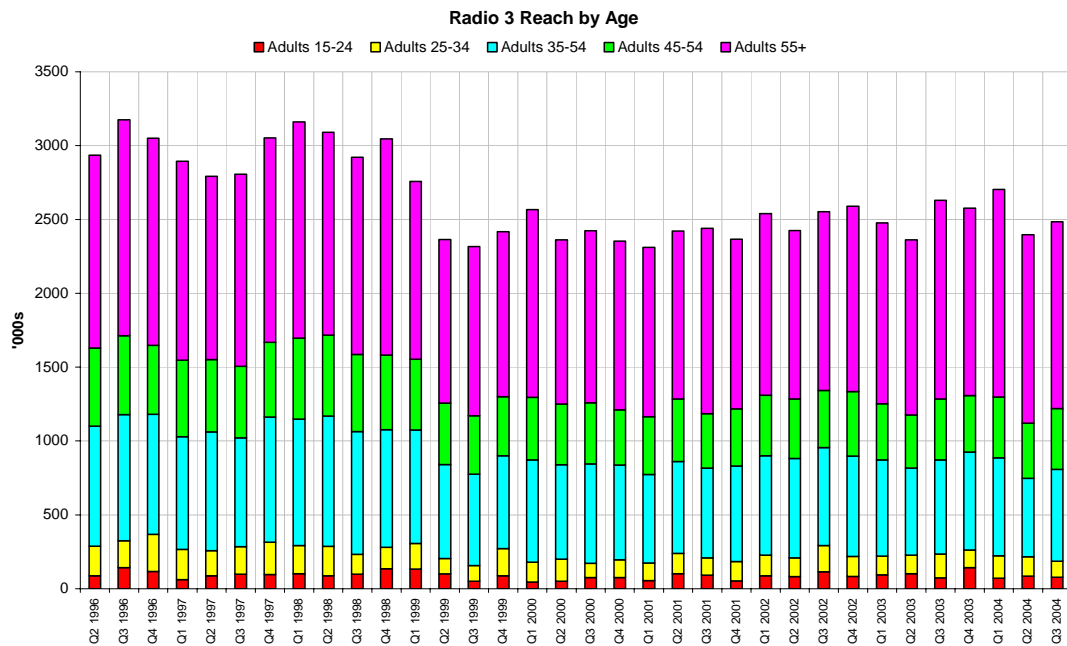
Radio 3 Average Hours

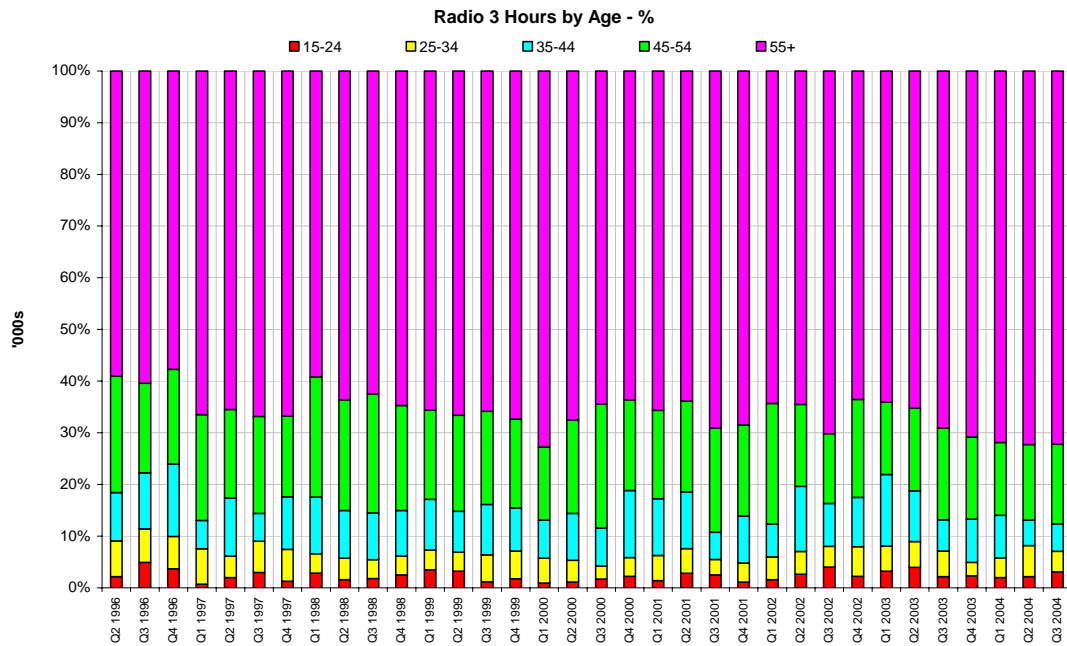
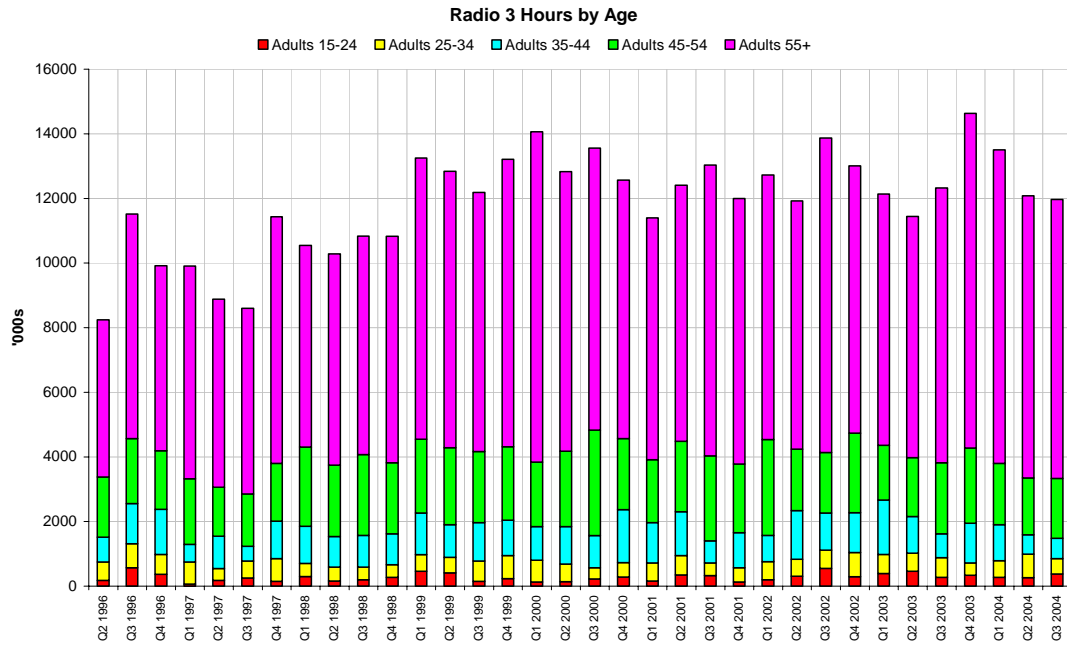


Demographics

Unsurprisingly, the Radio 3 audience is significantly weighted towards the older age range. The mean age of Radio 3 listeners is 57 in terms of reach, whilst it's 61 in terms of hours. What that means is that older listeners tend to listen longer.

This is born out by examining the reach and hours of Radio 3's audience by age groups.

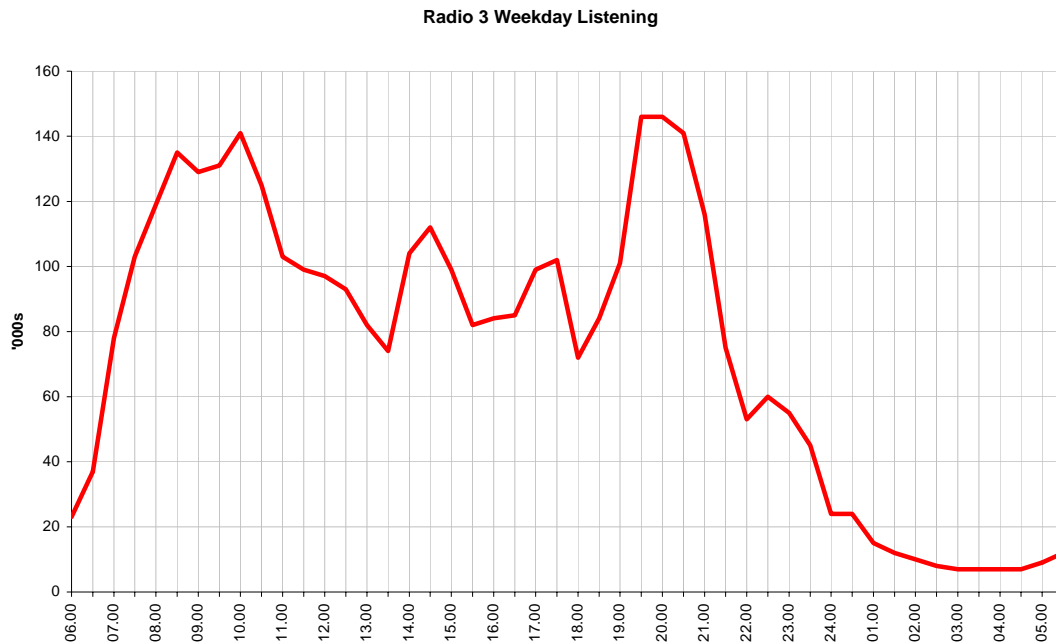




In Q3 2004, 72% of all listening is contributed by those aged 55 or older, whilst 15-34 year olds contribute just 7% of listening hours.

Listening Patterns

The following charts show the Radio 3 listening patterns, plotted by half-hour reaches through the day.

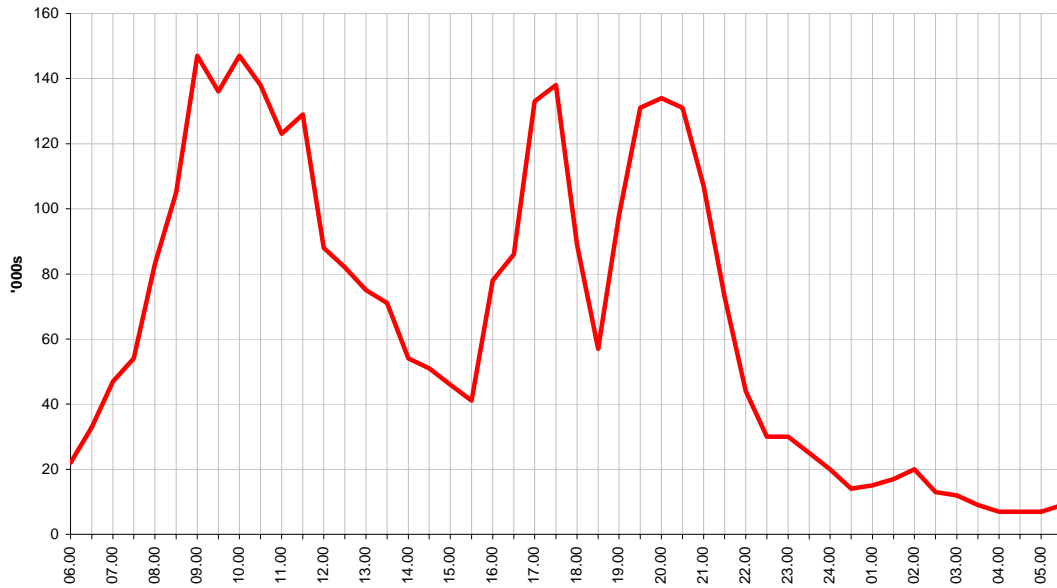


It's clear that there are broadly two peaks during the day – at breakfast running into the morning, with peak audiences at 8.30am and 10.00am, and in the evening, with a peak between 7.30 and 8.00pm.

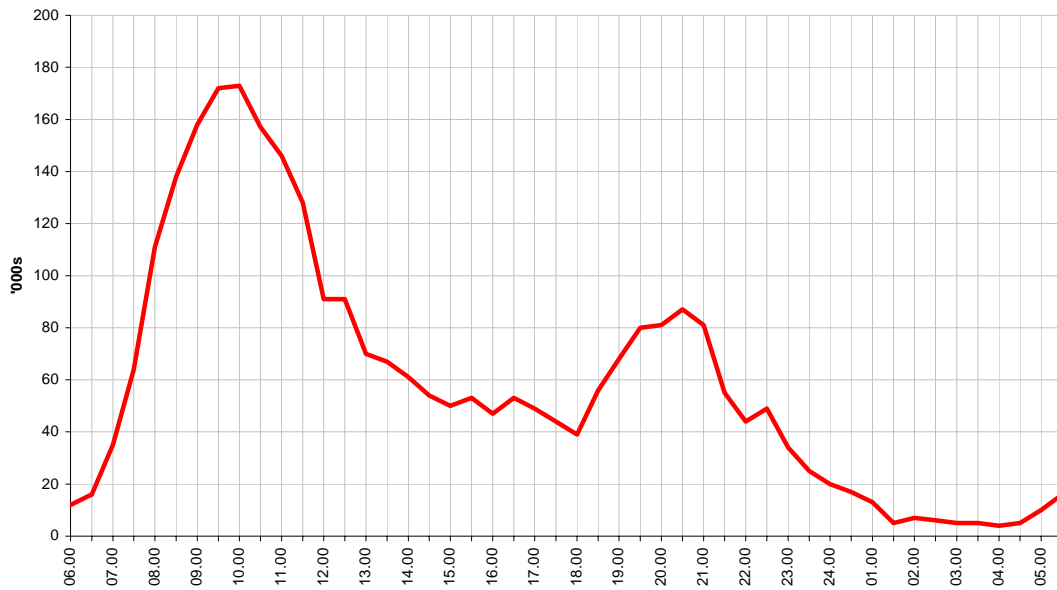
It should be noted at this point, that during much of the period measured in this RAJAR sweep, the Proms were being relayed live during the evening. Live and recorded concert broadcasts during this time period make up the programming for most of the rest of the year however.

In comparison with broader music stations, the evening peak is unusual and reflects the different audience and programming that's available at that time.

Radio 3 Saturday Listening



Radio 3 Sunday Listening



The more programme orientated weekend output means that there are some significant jumps around in who's listening to what and when. The Saturday chart shows more extreme movements possibly due to the inclusion on Saturday of the distinctly different types of music featured in World Routes and the jazz sequence of programmes.

On a broader scale, the available audience also varies, with mid morning being the overall peak time for radio listening on Saturdays and Sundays.

Programming

This section examines the audiences for individual programmes. Obviously, Radio 3's schedule means that programme lengths can vary in some of the slots on a day by day basis, so I've used a set of "average" show times.

Similarly, the same programming doesn't run every day across the week, but I've supplied Mon-Fri average figures here for simplicity. So the jazz programming on Fridays is actually amalgamated into the Monday-Thursday programming.

Since I've compiled this with the current Radio 3 schedule, it's possible that some of the programmes shown at the time of the RAJAR wave will have been different (e.g. I'm not certain that Nightwaves was on significantly during this period).

It should also be noted that longer programmes can obviously achieve larger overall reach figures than shorter programmes.

The table below shows the reach of individual programmes, and also the mean (average) age of listeners to that programme.

	Weekly	
	Reach	Mean Age
WEEKDAYS		
0700-0900 Morning on 3	731	59
1000-1200 CD Masters	594	61
1200-1300 Composer of the Week	418	61
1300-1400 Lunchtime Concert	338	62
1400-1530 Afternoon Performance	467	61
1530-1600 Making Tracks	280	62
1600-1700 Various	389	62
1700-1930 In Tune	758	59
1930-2130 Performance on 3	709	60
2130-2215 Nightwaves	393	58
2215-0000 Late Junction	298	54
0000-0100 Composer of the Week	84	57
0100-0700 Through the Night	201	61
SATURDAY		
0700-0900 Morning on 3	169	59
0900-1300 CD Review	309	60
1300-1400 The Early Music Show	105	60
1400-1500 Discovering Music	73	63
1500-1600 World Routes	65	62
1600-1700 Jazz Line-Up	113	60
1700-1800 Jazz Record Requests	155	59
1800-1830 Jazz File	100	62
1830-2045 Opera on 3	209	59
2045-2130 Between the Ears	144	63
2130-2215 The Verb	103	62
2215-2300 Pre-Hear	50	61
2300-0100 Hear and Now	49	61
0100-0700 Through The Night	60	58
SUNDAY		
0700-0900 Morning on 3	197	57

0900-1200 The Cowan Collection	326	57
1200-1300 Private Passions	133	64
1300-1400 The Early Music Show	95	65
1400-1530 Sunday Gala	89	64
1530-1600 Various	57	62
1600-1745 3 For All	78	64
1745-1830 Music Matters	65	64
1830-2000 Performance on 3	123	66
2000-2130 Drama on 3	127	62
2130-2215 Sunday Feature	74	62
2215-0000 Andy Kershaw	75	63
0000-0100 Composer of the Week	24	60
0100-0700 Through The Night	60	58

Recall that in reach terms, the average age of Radio 3 listeners is 57, yet the only slot that has a lower reach is Late Junction with an age of 54. This seeming discrepancy is probably due to the audience being different – for example, only 45% of Late Junction listeners also listen to Performance on 3/The Proms.

	Men	Women	15-24	25-34	35-44	45-54	55-64	65+
WEEKDAYS								
0700-0900 Morning on 3	56%	44%	3%	4%	8%	18%	29%	38%
1000-1200 CD Masters	50%	50%	3%	2%	7%	10%	29%	48%
1200-1300 Composer of the Week	52%	48%	3%	3%	7%	10%	31%	46%
1300-1400 Lunchtime Concert	47%	53%	3%	2%	3%	14%	35%	42%
1400-1530 Afternoon Performance	50%	50%	4%	3%	4%	13%	31%	44%
1530-1600 Making Tracks	52%	48%	2%	4%	3%	13%	30%	48%
1600-1700 Various	51%	49%	2%	2%	4%	14%	29%	49%
1700-1930 In Tune	55%	45%	4%	5%	9%	17%	26%	40%
1930-2130 Performance on 3	53%	47%	2%	4%	6%	17%	28%	43%
2130-2215 Nightwaves	55%	45%	4%	4%	8%	20%	25%	40%
2215-0000 Late Junction	57%	43%	5%	7%	17%	24%	18%	29%
0000-0100 Composer of the Week	65%	35%	4%	4%	5%	37%	20%	31%
0100-0700 Through the Night	66%	34%	0%	3%	14%	11%	25%	46%
SATURDAY								
0700-0900 Morning on 3	66%	34%	7%	2%	8%	19%	24%	41%
0900-1300 CD Review	54%	47%	6%	5%	3%	16%	28%	43%
1300-1400 The Early Music Show	56%	44%	5%	2%	7%	16%	30%	42%
1400-1500 Discovering Music	40%	60%	0%	0%	10%	18%	22%	52%
1500-1600 World Routes	48%	52%	0%	3%	5%	25%	25%	43%
1600-1700 Jazz Line-Up	62%	38%	1%	6%	12%	5%	30%	45%
1700-1800 Jazz Record Requests	67%	33%	0%	14%	7%	9%	23%	47%
1800-1830 Jazz File	68%	32%	0%	3%	10%	18%	20%	49%
1830-2045 Opera on 3	57%	43%	2%	3%	8%	18%	35%	33%
2045-2130 Between the Ears	57%	43%	1%	1%	1%	19%	36%	41%
2130-2215 The Verb	63%	37%	1%	2%	6%	23%	25%	43%
2215-2300 Pre-Hear	64%	34%	0%	2%	10%	26%	14%	48%
2300-0100 Hear and Now	71%	29%	2%	0%	8%	24%	20%	45%
0100-0700 Through The Night	72%	28%	3%	0%	23%	10%	23%	38%
SUNDAY								
0700-0900 Morning on 3	65%	35%	7%	7%	11%	14%	22%	38%
0900-1200 The Cowan Collection	55%	45%	3%	6%	10%	18%	30%	32%

1200-1300 Private Passions	53%	47%	0%	2%	3%	14%	35%	47%
1300-1400 The Early Music Show	55%	45%	0%	0%	5%	13%	32%	49%
1400-1530 Sunday Gala	54%	46%	0%	2%	4%	13%	36%	45%
1530-1600 Various	42%	58%	0%	0%	14%	5%	42%	39%
1600-1745 3 For All	47%	53%	0%	3%	1%	12%	41%	44%
1745-1830 Music Matters	43%	57%	0%	0%	6%	6%	31%	55%
1830-2000 Performance on 3	50%	50%	0%	0%	3%	11%	29%	56%
2000-2130 Drama on 3	64%	37%	1%	2%	9%	19%	21%	48%
2130-2215 Sunday Feature	68%	31%	1%	3%	8%	14%	31%	42%
2215-0000 Andy Kershaw	72%	28%	3%	5%	8%	13%	15%	55%
0000-0100 Composer of the Week	63%	38%	4%	4%	8%	4%	33%	42%
0100-0700 Through The Night	72%	28%	3%	0%	23%	10%	23%	38%

The demographic breakdown table shows that the majority of the programmes in the schedule have reasonably similar audience profiles.

The Saturday Opera on 3 is notable for having a smaller proportion of 65+ listeners, and similarly Sunday morning have fewer of this audience than most shows.

The audiences through the night are younger than most, with high proportions of 35-44s, although one should be wary of the small sample sizes for this programme.

The most notable difference from the norm is certainly Late Junction, with 29% of its audience aged under 15-44.

Other Radio 3 Facts

For many of the following, as well as supplying a percentage, I've also indexed the result. When an index is 100, the result is absolutely in line with the UK population as a whole. If an index is over 100 then Radio 3 listeners are more likely to do that, and where it's below 100, they're less likely to do it. So if the index for full-time employment is 80.2, then Radio 3 listeners are 19.8% (100 - 80.2) less likely than average to be in full-time employment (not surprising given the large number of retired listeners).

Note that once again all these measurements are from RAJAR

Employment

33% (Index 80.2) of Radio 3 listeners are in full-time employment, a further 12% (102.6) are in part time employment. Just 1.7% (23.1) are in full-time education, 1.2% (38.5) are unemployed and seeking work, while 6.0% (51.2) are neither working nor seeking work. Finally 9.8% (157.9) are self-employed and 45.7% (187.2) are retired. Note that the total comes to more than 100% since it is just about possible to be in more than one of these groups.

Ethnicity

95.1% (103.8) are white, 1.3% (166.9) are Black-Caribbean, 0.5% (66.2) are Black-African, 0.2% (33.3) are Black-British, 0.6% (45.5) are Indian, and 0.4% (42.4) are Pakistani. Other ethnic groups account for a further 0.9% of the audience.

0.2% (29.2) of Radio 3's audience speaks Welsh fluently.

Housing

58.9% (177.9) own their house or flat outright while 29.2% (68.8) have a mortgage. 3.8% (28.7) rent from the council, 6.7% (71.0) rent privately and 0.4% (90) live rent free!

Digital TV

45.9% (77) have some form of digital TV – be it satellite, cable or Freeview. Of those platforms the best indexing is Freeview with 134, whilst satellite is only 54.4. 47.5% (133.6) do not have digital TV. (What the other 6.6% receive is not clear!).

27.1% (95.0) of Radio 3's audience listen to the radio via the television. Note that this does not necessarily mean that they're actually listening to Radio 3 specifically, just radio in general. 3.9% (113.1) listen to the radio via the television everyday.

Mobile Phones

71.0% (99.4) of listeners have a mobile phone, and 3.0% (57.6) have listened to the radio via their mobile.

Other technology

97.7% (99.7) have a television at home. 63.0% (123.9) say that they're aware of DAB digital radio, and 7.5% (167.7) have a DAB set at home.

Internet

59.2% (120.4) of Radio 3 listeners have sent email in the last 3 months, and 57.6% (121.5) have used the internet for things other than email in the last 3 months.

30.0% (121.7) of the audience use the internet everyday, whilst 34.0% (79.5) never use the internet.

32.7% (129.2) have visited a radio station's website, whilst 20.2% (125.5) have listened to the radio via the internet. 2.2% (118.3) say that they listen to the radio via the internet everyday. Once again, they were not necessarily visiting the Radio 3 website or indeed listening to Radio 3 specifically via the internet.

Solus Listening

Finally 102,000 people, or 4.9% of the station's total audience listen to Radio 3 and no other radio station.

Adam Bowie (adam@adambowie.co.uk)

November 2004