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## THE WEEKLY UPDATE ON THE UK RADIO INDUSTRY

### RAJAR RESULTS

After many months of investigating the arrival of the radio industry's first joint RAJAR/BBC research system, the publication of the firm RAJAR figures branched into facts as well as views within the commercial sector attempted to discredit or explain away their own poor results.

The figures show conclusively that the UK's first national commercial station Classic FM has succeeded beyond expectations, attracting a weekly audience of 4.3m. They also demonstrate Atlantic 252's popularity with an audience of 4.7m, despite the Aire-based AM station only reaching two-thirds of the UK's population.

But the first RAJAR also shows all but a handful of local commercial stations with falling audiences, though many of them are now facing their first non-BBC competitors for listeners since their inception, following last year's launch of Classic FM and the consolidation of Atlantic 252.

Last Wednesday, commercial radio's trade body BBC set to discuss RAJAR and decided to publish the results, despite the poor showing of most of its AM members. Is Capital Radio MD Richard Fere admitted to The Financial Times: "It is surprising that the result should deliver a blow that is greater to BBC than it is to the BBC."

On Friday, RAJAR released the figures, accompanied by a terse press statement that admitted "results for many UK sections and some BBC Regional and Local stations differ markedly from that produced from previous surveys" and it officially reserved the right to retract the figures by adding "the proviso that a considerable amount of work is still to be undertaken to validate them." It stressed ominously that "material changes will be communicated by further updates."

The same day, the ATSC issued a separate press statement saying that "a number of its member companies have received figures that differ very markedly from previous research" and welcomed the RAJAR proviso. Both BBC and RAJAR stressed that it was not possible to make direct comparisons between data from RAJAR and previous results from JCRAM.

BBC also attached a four-page memo entitled "The Methodology Matters" that listed numerous possible reasons for such differences, including the fact that Classic FM and Atlantic 252 "are generally included in diary listings for the first time", and that The Big Breakfast TV show "produced a significant increase in Channel Four's viewing figures."

Despite its own figures having shown only marginal changes since the last

survey, Capital Radio issued a more socratic memo that admitted it was impossible to present people comparing results from the two systems. It advocated that "such a comparison is as scientific as taking two consecutive photographs of the same landscape on different film and concluding that the sky must have changed colour very quickly."

But comparisons are being made and there is some very revealing raw data from station owners who had still not hidden their individual stations' performances within an overall "group" total. Many provincial stations can be seen facing up to the new commercial competition for the first time, and Virgin Radio will arrive shortly to further challenge their listeners.

The RAJAR figures could see very owners having to discount their records and offer stations separately to advertisers, now that their individual performances are more transparent. In the continuing evolution, this could force some local operators into the jaws of larger radio groups such as GMR, Metro, Clyde and Texas World/BBC. For non-urban local stations who will now be enjoyed a easy monopoly on non-BBC radio, and have no experience of competitive strategy, RAJAR is the welcome writing on the wall.

### NATIONAL (46% adults)

station	MON format	share	week	average
		listening	listeners	listeners
BB	MP3H [various]	31.7%	44%	13.3
BBC Radio 1	MP3H top 40	22.4%	36%	11.6
BBC Radio 2	FM RCB	15.0%	22%	11.2
BBC Radio 4	MP3H news/talk	10.8%	19%	10.7
BBC local/Deep	MP3H [various]	9.5%	30%	6.6
Atlantic 252	AM top 40	5.7%	9%	7.7
Classic FM	FM classical	2.8%	9%	5.6
BBC Radio 3	FM classical	1.3%	9%	4.7
BBC Radio 5	AM sport/education	1.5%	8%	3.3
others		3.8%	13%	5.6

source: JCRAM/RAJAR/BBC

## CAPITAL LEADS LONDON

Capital Radio has retained its predominant position in the London radio market, according to newly released RAJAR/BSL audience data. Capital FM remains the most listened to station, whilst Capital Gold continues to hold fifth position out of the fifteen London-wide stations in the sector.

In other significant changes, Radio 1 and 2 have both managed to reverse their formerly declining share of listening in London, though they retain their positions of third and fourth place respectively. The greatest loss is suffered by BBC 5W, whose hours listened have tumbled by 60% since the previous JICRA survey six months earlier.

"It's very satisfying that our market share has held up well," says Capital Radio Programme Director Richard Park. "We're just doing the same things that we've been doing since I came here in 1987. It's not a magical formula. It's exactly the same pattern all the time."

Capital's press statement on the new figures delights in documenting how it has successfully beaten off six new London-wide stations since 1987. But how will the format market change with the impending arrival of Virgin Radio?

"It is an intriguing statement because it is on AM and will be playing a rather kind of music," comments Park. "Will the public turn to it in large numbers? And whose audiences will they be targeting? Will they target commercial radio's because they are commercial too? Or will they be targeting Radio One's? I would expect that's something that both ourselves and Radio One should look out for in terms of audience share."

The introduction of the new RAJAR audience system has left a lot of commercial stations sceptical about the results, but the London figures seem relatively unexceptional.

"I think the fact that they're showing such lower listenership, at a time of year when listenership is traditionally quite high, has surprised me," says Park. "But both our stations seem very steady on a programme to programme basis. Sure, a couple of gaps [DJs] are a few percent up and a couple are a few percent down. In that sense, it looks like the last JICRA survey we had."

Are there specific programmes that have given you good results?

"I'm pleased the daytime programming on both channels is strong. Chris Farret [Capital FM breakfast DJ] has once again given us a great start, as

has Tony Blackburn [Capital Gold equivalent]. It's the only broadcaster on either channel to increase, and I couldn't explain that to you. If he hits a good spell, the powers go with him. And some 'Blackburn' every now and then seems to do people good."

What new developments are planned for the the coming months?

"In terms of the daytime and weekend shows, those audience figures are a mandate to carry on doing what we've been doing with the people that we've been doing it with. In that sense, there won't be anything different. Now it ain't broken, don't try to fix it. I think we've got to continue at this stage of the game so we see..." And is there still room for Capital's figures to improve in the future?

"I'm happy to see that our script share still remains in a healthy position. I feel very good about it all. I think we've brought off two good results. We're in a position to bring off a few more good results with a bit of luck and the wind in the right direction. We average hourly for the two stations are 24.3 - that is the highest on the [RA] network outside of Scotland. That to me tells you everything about customer satisfaction."

### LONDON (9.6m adults)

station	M/P	format	share of listening %		
			1991	1992	1992
			IV	II	IV
Capital FM	FM	top 40	15.1	17.7	16.9
BBC Radio 4	AM/FM	news/talk	11.4	13.9	13.3
BBC Radio 1	AM/FM	top 40	12.3	11.3	12.5
BBC Radio 2	FM	MB	11.4	11.0	11.6
Capital Gold	AM	oldies	11.2	9.2	9.4
LBC Teleshock	AM	news/talk	4.1	5.8	6.0
Wolsey	FM	easy listening	9.4	3.6	4.0
LBC NewsTalk	FM	news/talk	4.0	4.3	3.2
Classic	FM	classical	---	---	3.0
FIVE	FM	dance	4.3	4.0	2.8
BBC Radio 3	FM	classical	2.3	2.0	1.7
BBC 6RA	AM/FM	news/music	n/a	n/a	1.6
Jazz	FM	jazz	1.2	1.3	1.4
BBC Radio 5	AM	sport/education	1.1	1.2	1.2
Spectrum	AM	ethnics	n/a	n/a	1.1*
[other IIR			n/a	n/a	0.4
[other BBC local			n/a	n/a	2.1
[other non-BBC local			3.7	4.2	2.9

source: JICRA/RAJAR/BSL. \*Spectrum 724 is 7.9%.

## PETERBOROUGH RE-ADVERTISED

Two commercial radio licenses for the Peterborough area have been co-advertised by the Radio Authority. Both are currently held by Mid Anglia Radio plc who operate the FM 96.7 Top 40 Newstart Radio and the AM 94.6 oldies The World's Greatest Music

Station [WMS], which launched nine months ago ending twelve years of simulcast Newstart Radio on both frequencies.

Latest RAJAR/BSL data gives Newstart only a 5.8% listening share across

the Mid Anglia area, and WMS only 3.4%. The Radio Authority expects coverage on FM to be 225,000 adults, and on AM 575,000. Applications close on 4 May and a decision is expected within three months.

## RADIO WAVES

The debate over RAAK results rages on. ILE stations celebrating increased listening shares include: **Just FM** Birmingham up from 2.8% six months ago to 2.7%, **Clips** 2 Glasgow 19.4 to 20.3 and **Clips** 2 London 9.2 to 9.4, **City Gold** Liverpool 6.0 to 7.0, **Downbeat** Belfast 19.1 to 22.1, **Just FM** London 1.3 to 1.4, **LBC** 20 Bedford/London 5.8 to 6.0, **Parade** South W/W/Weston 10.8 to 12.9, **Mojo** London 3.8 to 4.0, **Homeville** Cap/Manchester 11.9 to 13.2 and **Homeville** Gold 15.2 to 15.4, and **Beats** 2 SuperGold/Whitstable 6.0 to 8.0. Local BBC stations with good results include **Corwall** with a 24.1% share, **Hereford** and **Worcester** both with 20.7%, and **Wester** with 19.8%. At the other end, newly launched **Bedfordshire** scraped only 1.8% and **SEA/London** was surprisingly low at 1.5%. The overall London TSA figures for listening to BBC Local Radio is shown as 1.7%, implying that the difference of 2.3% is accounted for by listeners to BBC local stations from the Home Counties. **Capital Radio** PD Richard Park commented: "Whereas **BBC** [BBC Managing Editor] is going to be gutted because I don't think he thought he was performing badly, **KISS** and **Moby** are also crying into their beer as **KISS** Radio, whose rationalised and reorganised **Radio Mercury** and **Coast** Sound services in **Bedford/Crawley** managed only 0.7% and 2.5% shares respectively. Proof that you can't disrespect your listeners and expect to keep them." **Mid** Anglia Group have been popping the champagne noisily, even though their results look a little strange. Shares for their

**Harward/Peterborough**, **CE/W/Cambridge** and **EL/W/Kings Lynn** stations were distributed across the whole 5.9% TSA rather than just in each station's immediate area. Surprisingly, this shows their listening shares 5.8%, 1.8% and 1.7% respectively, since most diarists probably couldn't hear two of these stations even if they had wanted to. A possible that paid off? **Choice** W/Bristol decided to extend its TSA by 50% into North London where it has a legal following. Its weekly reach has remained at 68, and its 2.8% share of listening in its enlarged 1.1m TSA now equals that of similarly targeted **KISS** FM within its larger Londonwide TSA. Speculating on **KISS** FM's declining share of listening from 4.0% to 2.8%, **Capital's** Richard Park comments: "This methodology did not favour 19-24 year olds. I know they [RAJAR] had problems in the first month picking up 19-24s. I think **Capital** and **KISS** are more affected by that than anybody else. I think **KISS** find themselves in a false position. Let's see another couple of [RAJAR survey] jobs." Ignores the figures and just generate publicity? **Galaxy** Radio/Bristol's press release says the station now reaches more than a quarter of 19-24 year olds, making it "the most fashionable radio station in town." **Beagle** Chief Executive Eddie Startup's quote that "this is great news", the release fails to mention that **Galaxy's** listening share is down from 5.4% to 4.8%, at also are its reach and average hours. Find an interesting angle? **Just FM** London trumpets itself as the UK's "most upmarket radio station." It claims its listenership to be 75% BBC, compared to **Classic** FM's 62%.

Jerry Fielder of ad agency Leazes Delaney is quoted saying **Just FM** "now has a unique social and economic cachet." What he doesn't say is that the station has a unique ability to draw less than half the listening of **Classic** FM in London, and is only marginally more popular than **Radio 5** back in the real non-RAJAR world. **Virgin Radio** has signed advertising **Orling** Black Label (their first use of the name), **Nationalist** and **Express** Newspapers. Test transmissions start early March. His have been decided but not publicly announced yet. Two former areas from Assistant **News** Editor at **BBC** East Midlands to become Manager of **BBC** **Harford** & **Worcester**. **BBC** **Wiltshire** Sound Manager **Tony** Talbot moves to the new position at **BBC** **Radio Gloucestershire**. **Richard** **Franklin** moves from **News** Editor to Station Manager at **South** **Sound/Worcester**, following the sacking of incumbent **Alan** **Thompson** who has joined "Biffon politics". **Radio 5** Managing Editor **Jim** **Black** has taken early retirement after thirty years with the BBC. His post and that of Assistant **Mike** **Thorn** become vacant, though **Thorn** becomes reappointed to 2 to Controller **Pat** **Eding**. Do we really need to hear **Whitney** **Houston's** current number one on a specialist show? The unimpressive standards for temporarily absent **John** **Leach** on **Radio 5** Monday evening show show you realize how effortlessly **Leach** himself succeeds in putting together one of the best and most programs on radio. Cool how soon, **John**, wherever you are.

## LBC SOLD AFTER CROWN CRASH

Control of London talk station LBC has effectively passed to Chelverton Investments, following former owner Crown Communications' surrender to receivership with debts of £15m. Chelverton's main investors are Matthew Cartlister and John Porter, 40-year old son of controversial Tory politician **Dame** **Shirley** **Porter**.

Crown's collapse was precipitated by the refusal by the French broadcasting authority CSB to allow the £16 million of Crown's shares in French network **RFM** on the grounds that its 70% stake contravened French law. Crown's bankers, **ABN** and **Bank** of **Scotland**, decided they could no

longer support the company and called in the receivers last Wednesday night.

Chelverton bought 49% of LBC for £7m, with an option to purchase the remainder from Crown's receivers, and are investing £1m now and a further £2m should LBC retain its London licensees follow their redevelopment later this year. His owners **Cartlister** and **Porter** addressed LBC's staff at their Harmondsworth offices following the deal, and the station's programming has been unaffected.

"We bought the station in order to have continuity of programming."

**Porter** told **UK** **Press** Gazette. "We are determined to uphold LBC's reputation and to extend its position as the capital's news and current affairs broadcaster."

**Porter**, **Cartlister** and **Jenna** **Norton** from Chelverton have joined the LBC board, together with **Barry** of **London** **Wireless** **Freemantle**. **Porter** has confirmed that his mother would probably join the board in future, but reportedly assumed the Radio Authority that a "soft-landing" director would also be enlisted to ensure political balance.

# RADIO DIARY

- 9 **FEB LICENS** closing date for licence re-applications for AM & FM licences serving 1.2m & 770,000 adults respectively, starting 1 Sep 1994. Info: Radio Authority
- 9 **FEB SOUTH/SOUTH/WEST** closing date for licence re-applications for AM & FM licences serving 1.5m and 770,000 adults respectively, starting 12 Sep 1994. Info: Radio Authority
- 10 **FEB LICENCE** 90 FILL conference on applying for Radio Authority licences at The Roof Gardens, 95 Kensington High Street, London W8 5AD. 875-34 members/535-13 non-members. Info: The Radio Academy, PO Box 482, London W14 4EE Tel: 071-323-3837
- 10 **FEB WHAT FUTURE FOR REGIONAL BROADCASTING?** debate at Committee Room, House of Commons 6-7.30pm. Info: Voice Of The Listener & Viewer, 101 Kings Drive, Gravesend, Kent DA12 5BQ tel: 0474-353835
- 11 **FEB DE RADIO - THE NEW ERA** conference at Hotel Conrad, London 9am-5.15pm, 1811. **Open Speakers**, 524 Fulham Road, London SW6 5NR. Tel: 071-771-0880
- 15 **FEB RADIO ACADEMY DINNER** in the company of John Greenwood with introduction by David Neller at The Council Chambers, Broadcasting House, London W1. 8.30pm. 125-25 members/DA7 non-members. Info: The Radio Academy, PO Box 482, London W14 4EE Tel: 071-323-3837
- 16 **FEB FOCUS ON RADIO** (1) debate on BBC Green Paper at RSA, 8 John Adam Street, London WC2R 4EJ. 11.75. Info: The Radio Academy, PO Box 482, London W14 4EE Tel: 071-323-3837
- 17 **FEB WHAT FUTURE FOR EDUCATIONAL PROGRAMMES?** debate at Abbey Centre, London SW4 10.30am-4.30pm. 126. Voice Of The Listener & Viewer, 101 Kings Drive, Gravesend, Kent DA12 5BQ tel: 0474-353835
- 24 **FEB THE GREEN PAPER & THE FUTURE OF THE BBC** seminar at Committee Room 14, House Of Commons, 5-6.30pm with Heritage Minister Peter Brooke. 16. Voice Of The Listener & Viewer, 101 Kings Drive, Gravesend, Kent DA12 5BQ tel: 0474-353835
- 2 **RAA LYONS/SOUTHERN** closing date for licence re-applications for AM & FM services serving 1.05m and 0.46m adults respectively. Info: Radio Authority
- 2 **RAA NORTH/WEST** closing date for licence re-applications for AM & FM services serving 540,000 and 330,000 adults respectively. Info: Radio Authority
- 2 **RAA AVE** closing date for licence re-applications for AM & FM services serving 550,000 and 220,000 adults respectively. Info: Radio Authority
- 3 **RAA RADIO ACADEMY MUSIC CONFERENCE** at The Brewery, London ECL. 11.15.32. Info: The Radio Academy, PO Box 482, London W14 4EE. tel: 071-323-3837
- 9 **RAA SCARBOROUGH** closing date for new licence serving 66,000 adults on AM or FM. Info: Radio Authority
- 10 **RAA WHAT FUTURE FOR FUNDING & RURAL PROGRAMMING?** debate at Abbey Centre, London SW4 2-4.30pm. 110. Voice Of The Listener & Viewer, 101 Kings Drive, Gravesend, Kent DA12 5BQ tel: 0474-353835
- 14 **RAA WHAT FUTURE FOR LIVE MUSIC?** debate at Committee Room, House of Commons 6-7.30pm. Voice Of The Listener & Viewer, 101 Kings Drive, Gravesend, Kent DA12 5BQ tel: 0474-353835
- 16 **RAA NORTH/EAST ENGLAND** closing date for new regional FM licence serving 4.3 million adults. Info: Radio Authority
- 18 **RAA FOCUS ON RADIO** (2) debate on Speech Radio at BT Conference Centre, Regent Street, London ECL. Info: The Radio Academy, PO Box 482, London W14 4EE Tel: 071-323-3837
- 23/4 **RAA WHAT FUTURE FOR PUBLIC SERVICE BROADCASTING? - A GLOBAL ENQUIRY FOR LISTENERS & VIEWERS** conference in London. Voice of the Listener & Viewer, 101 Kings Drive, Gravesend, Kent DA12 5BQ tel: 0474-353835
- 6 **RAA CENTRAL** closing date for licence re-applications for AM & FM services serving 620,000 and 330,000 adults respectively. Info: Radio Authority
- 6 **RAA DORSET/WEST** closing date for licence re-applications for AM & FM services serving 280,000 and 240,000 adults respectively. Info: Radio Authority
- 20 **RAA FOCUS ON RADIO** (3) debate on music radio at BT Conference Centre, Regent Street, London ECL. Info: The Radio Academy, PO Box 482, London W14 4EE Tel: 071-323-3837

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