

Researching the young radio audience

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Abstract

In 2008, the European Broadcasting Union (EBU) proposed some guidelines to radio broadcasters designed to activate the recovery of younger listeners. They did this after observing that radio's penetration among the youngest sectors was in decline. According to this report, the key to halting this decrease was to join forces with the Internet, since the latter accounted for the main lack of interest in radio among this particular demographic, especially as far as music radio was concerned. The main focus of the guidelines was therefore on the online environment. What was recommended was that attention should be paid to website development and promotion with particular emphasis on the issue of interactivity. However, taking these steps might not in itself be enough to halt young people's loss of interest in radio. Understanding and interpreting this disaffection also requires the use of methodological research tools—including the study of quantitative data provided by audience measurement companies, organisations that analyze the listening habits and expectations of young people. In this chapter, the methodological tools designed to address this communicative issue will be examined in some depth. The findings confirm that a new approach is needed for the study of radio audiences.

Keywords: radio consumption, young, audience, Internet, methodology

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1 Introduction

Young audiences have become a problem for the radio broadcasting industry. In fact, the report published by EBU in 2008 was a public confirmation that radio broadcasters had finally begun to notice the effects resulting from young listeners' disaffection. This state of affairs was common to both public and private operators, all of whom were observing how music radio stations were beginning to lose their influence over those who so far had been their main listeners. The streaming services with music content such as Pandora (Meneses, 2012) or Spotify, and platforms such as YouTube have emerged as significant providers for young listeners. Apart from other important features, these music providers have allowed users to create customized playlists that they can carry in their pockets thanks to the new digital music players such as MP3, MP4, iPod (Berry, 2006; Ferguson, Greer, Reardon, 2007) or the mobile phone (Ling, 2007).

But, was the reason for this disaffection among young listeners exclusively related to technology and the Internet? Was implementing new services linked to radio station websites the best strategy to entice young audiences? This was the key question for the industry. However, a researcher should consider other issues that, on the one hand, go further than what is obvious (Huertas, 2002) and, on the other hand, help to interpret the quantitative data provided by audience studies. These studies have a commercial goal and they are used as a reference point for the negotiations between operators and advertisers since this is how radio broadcasting companies are positioned in the market (Martí/Monclús/Gutiérrez/Ribes, 2015). Thanks to these reports, the operators have been able to discover more about the socio-demographic structure of their audiences, the equipment that they use in their homes, their media consumption habits and their lifestyles. This will, however, still not give them key information to help them understand the underlying reasons for the disaffection of the young audience. What is clear is that, without this information, radio stations will not be able to develop any kind of successful communications policy.

The aim of this chapter is, therefore, to analyze how these methodological tools can contribute to a better understanding of the relationship between programme providers and their young listeners based on research projects developed in Spain.

2 Defining the problem: the young audience

Why has music radio lost one of its traditional roles as an advice giver? How does radio attempt to appeal to young listeners' collective imagination? How is their media diet structured? How and for what purposes do they use new tech-

nologies? As mentioned above, the EBU in its report has highlighted an issue that operators have been aware of for quite some time. For example, in Catalonia-one of the most complex regional broadcasting markets in Spain- the average age of the listeners to music radio in 2008 was 38 years old an increase of 3.5 percentage points since 2001 (Martí, Ribes, Gutiérrez, Martínez, Monclús, (2011, p. 143). This piece of information alone shows that the industry has a serious problem. Generally, the various stakeholders addressed the decrease in radio penetration among young listeners by resorting to the same strategies as they had previously used. However, the context had changed and the audience at that moment had different characteristics.

When the researcher is focusing on factors that involve reception, certain criteria must be applied in order to produce clearly defined samples. The approach to specific radio broadcasting markets allows an in-depth study based on its own characteristics. Although the EBU's wake-up call was directed at its members, each radio broadcasting ecosystem operates under different conditions; so even though the issues are global, the approach has to be local. In Spain, the radio's decreasing penetration among the audience in the 14 to 19 age range was less pronounced than in Catalonia. The cause of this difference might be related to emotional bonding. A closer look at the radio stations surveyed in this research shows that the trend with listeners in Catalonia is that they consume generalist and music radio content produced in their region and language by both public and private providers.

Viewed more generally, young people's disaffection towards this medium makes a kind of sense. These young people, also known as digital natives, have always been considered to have natural skills when using digital devices (Prensky, 2001). It is obvious that their media experience is different to that of previous generations. The fast-paced technological evolution is responsible for turning the @Generation into the #Generation, one that is connected at all times and one that is adept at using social media tools (Freixa, Fernández-Planells, 2014).

Developments in the digital environment have modified the media consumption habits among the young population (Livingstone, 2002; Pronovost, 2006; Arbitron y Jaccobs Media, 2007; McClung, Pompper, Kinnally, 2007; FUNDACC, 2008; Tabernero, Sánchez-Navarro, Tubella, 2008; Aranda, Sánchez-Navarro, Tabernero, 2009; among others), and they have especially affected radio. This is a global phenomenon but the approach to a well-defined sample by geographical criteria introduces inherent characteristics of the subject group and its own context. Studying reports that provide insights into sociocultural habits is a necessary stage in any audience research. These studies offer contextual data regarding the social and cultural environment that contribute to interpreting the results according to additional methodological tools.

For example, in the case of young Catalans between 14 and 24 years old, according to the data from El Baròmetre de Catalunya (FUNDACC, 2008)¹, *listening to music* (97.1%) was their favourite cultural practice, while *listening to the radio* (54.3%) was behind ‘*surfing the Internet*’ (64.1%) or ‘*going to the cinema*’ (59.5%). But what kind of music content do young people tune into and how do they consume it? Gutiérrez, Ribes, Monclús, (2011, p. 313) concluded that the main downloaded product was music (96.9% young people questioned in the survey) obtained from P2P networks such as eMule, eDonkey or Kazaa. Only 19.7% bought music over the Internet while 32.8% had never done it. For the majority of respondents, the network made available a significant amount of data that they did not have to pay for. Films (63.6%) and IT programs (50.4%) were also part of this content to which they had free access². In fact, the Internet has supported this form of consumption and it is a characteristic inherent to the @Generation’s DNA.

3 Radio programming for youngsters: Analyzing the content

A review of relevant audience studies allows operators to know which are the most popular programs [...], improve the offer but also to increase their income from advertising. (Portilla/Herrera, 2004, p. 162). Due to the high level of competitiveness, the formats of music radio in Spain have lost their traditional identity in order to attract bigger audiences³. This strategy evidences that broadcasters have forgotten that music formats define the brand so that audiences can recognize it easily.

However, music brands need to give the structure to a story based on the creation of its own sound (Moreno, 1999). Combining different elements results in a specialized offer that should allow each listener to choose the most satisfactory music style for them (Country, Classic Music, Pop, Adult Contemporary, Hits, among others) and that, generally, has a specific target.

An analysis of the content allows one to take a closer look at the music formats as well as to find out what kind of content radio stations are offering young people. By adopting this method, one can detect the changes made to formats between 1999 and 2008 in the music offered on the radio in Catalonia (Table 1). Firstly, one can observe the appearance of new formats such as

1 El Baròmetre is an audience study developed by the Fundació Audiències de la Comunicació i la Cultura (FUNDACC). This organisation has been supported by most of the Catalan media from the very beginning since they thought the results from the national studies did not reflect the complexity of the Catalan media ecosystem.

2 These results are part of the research project Youth and Radio. Current issues and future trends conducted by the Observatori de la Ràdio a Catalunya (l’OBS, 2009) and sponsored by the Associació Catalana de la Ràdio. 1,002 youngsters were interviewed

3 Nowadays, some music stations combine different music contents such as Top 40 and Hits or Easy Listening music in the same schedule.

Crossover, Oldies or Non- Commercial Music and, secondly, the resurgence of AC and Dance. The latter is undoubtedly the music style that is closest to the preferences of young adults in the 14 - 24 age range.

Table 1: Music and thematic networks and stations' evolution in Catalonia, concerning the broadcasting format

1999	2008
MUSIC LISTS	
40 Principales, Hot 70, Radio Club 25	
ADULT CONTEMPORARY (AC)	
M-80, Flaixbac, RKOR, Ona Música, Cadena 100, RAC 105	M-80, Ràdio Flaixbac, Cadena 100, RAC 105, Europa FM, Kiss FM, GUM FM, Styl FM, Pròxima FM
CROSSOVER	
	40 Principales (Music lists and AC)
OLDIES	
	Èxits FM
FOLKORE	
Cadena Dial, RM Radio, Radio Tele Taxi	Cadena Dial, RM Radio, Radio Tele Taxi, Radiolé
CLASSIC MUSIC	
<i>RNE Radio 2, Sinfo Radio, Catalunya Música</i>	<i>Radio Clásica (RNE), Catalunya Música</i>
DANCE MUSIC	
Flaix FM	Flaix FM, Màxima FM
BEAUTIFUL MUSIC	
Ràdio Estel	Ràdio Estel
NON COMERCIAL MUSIC	
	<i>iCat fm</i>
MIXED FORMATS	
<i>RNE Radio 3, Catalunya Cultura</i>	<i>RNE Radio 3, Catalunya Cultura</i>

Note: Public stations in italics.

Source: Martí/Monclús (2008)

The analysis of the audience data and programme schedules does not provide enough elements to understand the music stations' change of strategy as reflected on Table 1. Qualitative research is needed to discover the elements that have influenced the specialized format migration towards formats designed to appeal to a heterogeneous audience.

4 Delphi technique: The operator's perspective

Despite the declining number of young radio listeners, operators have kept applying the same traditional parameters of the radio business to their digital context. Most of the studies on the disaffection of the young towards radio have focused on the consumption habits or the offer of contents within the digital context. Nevertheless, this approach is exclusively restricted to one of the actors involved. The exception is L'OBS (2009), which considered it essential to include the industry's point of view by organising a Delphi⁴.

At this point, the researcher must decide what the best option is: a semi-structured interview or a Delphi. In both cases, the participation of the industry is essential since it is responsible for designing the schedules and it should deal with the issues the researcher has raised. Each methodological tool has its own strengths and weaknesses. With the interview, the researcher can get to know each operator's point of view and compare the answers, whereas with the Delphi there are many points of view put together in the same session and, as a result, there is debate and reflection.

Having in mind that disaffection among young listeners was a global problem, the OBS (2009) decided to organise a Delphi in which six professional experts on music radio in Catalonia participated (Gutiérrez, Ribes, Monclús, 2011, p. 312). Which new findings were forthcoming from this session? During the Delphi, all the music content managers agreed that special attention should be paid to the following points:

1. The industry had ignored the audience in the 14 to 24 age range because it was the segment of the population with the lowest spending power. It was the least interesting commercially speaking.
2. Music radio broadcasts very few new music releases each week. The programmers admitted that the number of weekly releases had decreased from 15 to 1 or none. The renegotiation of the agreements with the music industry was a difficult matter to deal with because of the crisis they were also going through due to the appearance of music repositories such as Pandora or Spotify, among others.
3. The strategy of recycling content generated repetition; a situation that the hot clock structure⁵ emphasized even more. The variety was obtained by recovering hits introducing formulas similar to Crossover or AC.
4. Adapting to the digital environment was regarded as the best strategy for regaining the interest of young listeners, provided that there was new content and services.

4 The Delphi method is a qualitative research technique based on structural surveys to expert panels. It is also a useful tool to evaluate current matters in the communication process.

5 It is a clock diagram that organises the music play list during the day.

5 The youth point of view: Quantitative and qualitative techniques

As was discussed above, most of the research work focused on carrying out a full survey of the radio consumption habits of youngsters in the 14 to 24 age range. To do so, quantitative methods such as surveys and samples were used which were constructed according to demographic criteria and which aimed to be representative.

This kind of exercise is complex due to the fact that it requires a sufficiently large number of subjects that respond to criteria of proportionality. A common trend among researchers is to create samples amongst the university population. This option is easier to implement in a practical sense but the results only reflect the behaviour of one part of the young population. Table 2 shows the main features of the samples in 3 pieces of research that focused directly or indirectly on the relationship between youth and radio.

Table 2

Features	OCENDI	L'OBS	Publiradio
No. Surveys	956	1,002	521
Target	18-20 years old	14-24 years old	18-24 years old
Education	University	High School, Professional, University	University
Selection	Planned	Planned	Random

Source: Compiled by authors based on López, Gómez, Redondo, 2014 (OCENDI); Gutiérrez, Ribes, Monclús, 2011(L'OBS); Perona, Barbeito, Fajula, 2015 (Publiradio).

L'OBS (2009) shows the most complete sample since it covers a wider spectrum of the population and introduces new indicators such as education or profession, among others. With regard to gender, in all 3 cases the proportionality found in the Spanish and Catalan society was paralled.

What should also be taken into account is how the questionnaire was set up. The mixed structure allows for closed questions, which result in quantitative data, whereas the more open questions offer a qualitative vision. Among the quantitative data, three of the most important studies about young people and their relationship to radio highlighted the fact that the although youngsters declare they were radio listeners (Gutiérrez, Ribes, Monclús, 2011; López, Gómez, Redondo, 2014; Perona, Barbeito, Fajula, 2015), this information does not correspond to the medium's penetration rate found in audience studies.

But, was this the reason for their relative lack of interest in radio? Different studies point to other factors that directly or indirectly could explain the disaffection of young people towards music radio:

1. The net and the new mobile devices allowed them to create customized playlists where the main content was the music they had previously selected and downloaded to listen to it anytime, anywhere, anyway (López, Gómez, Redondo, 2014, p. 53).
2. The hot clock structure generates repetitive or monotonous music choices interrupted by low quality ads (Book/Grady, 2005 in Albarrañ, 2010, p. 106).
3. The absence of emotional bonding towards a radio brand is a result of the listener's detachment and it leads to a loss of loyalty. (Martí, Gutiérrez, Ribes, Monclús, Martínez, 2010, p. 77)
4. Book and Grady (2005) highlight that one of the main reasons for dissatisfaction is the feeling that radio DJs speak too much. (Albarrañ, 2010, p. 106).

In the L'OBS' study (Martí, Gutiérrez, Ribes, Monclús, Martínez, 2010) youngsters are asked to write down the titles of three radio programmes they usually listen to. Only 208 interviewees out of 1,002 were able to provide the correct titles. After discounting different variables, it was concluded that young adults listen to the radio sporadically and for a very short period of time, between 15 minutes and 1 hour at any one time. The survey was made in a context where radio stations considered consumption of less than one hour as representing a crisis factor. Furthermore, it was established that multitasking is a feature inherent to the @Generation, so this could also explain how difficult it might be to maintain a high level of attention on one single topic. Taking into account the fact they listen to the radio while carrying out another activity, it is understandable that one cannot presuppose an attentive audience.

From this perspective, the L'OBS team decided to do some further research into the determining factors around radio listening: what content was the favourite, which brand was usually listened to, what was the title of the programme, for instance. This kind of information was key to understanding in the phase before consumption habits had changed, that is why listeners were asked to recognize brand and programme. The results were uneven but very interesting to the industry⁶. In aspects such as where they used to listen to the radio, the approach of the three pieces of research coincided.

In order to complement the questionnaire, the use of focus groups is an interesting methodological technique. A key part of the thematic design of the survey was its use of the results. Organising a survey is already a difficult task, but organising a focus group increases the level of difficulty. Firstly, the participants must meet the selection criteria, and secondly, they all must agree

⁶ Audience studies are based on memory experience so to know the right title of a programme is relevant.

on a specific place and time to be present. The focus group as a qualitative technique allows one to detect new elements that can generate new research questions as well as confirming the data obtained through the questionnaires. This qualitative research can only point out certain trends since the way in which it is conducted means the results will never be representative. Regarding the issue of disaffection, the discussion groups in the L'OBS study⁷ revealed that radio was considered to be an obsolete medium used by parents or grandparents, and with little chance of being further developed on the Internet.

5 Concluding remarks

An existing communicative problem was used as the starting point for this piece of research and for considering the particular issues that each methodological technique has for the results. The purpose did not involve an assessment of the analyzed research studies. From the methodological perspective, the goal was to describe their contributions to the analysis of young audiences.

The researcher must deal with a number of limitations imposed by the very object of study. At this point, the design of a good methodological tool is essential and it should not create new obstacles in the course of the research. There is no correct way of determining which technique, the quantitative or the qualitative, is better. However, the key is to use the most convenient tool to be able to answer the questions raised or to verify the hypothesis postulated at the start of the research process. Whereas the quantitative techniques can correct the ambiguity found in the qualitative tools, the latter can confirm or refute the figures and open new perspectives. Now the question is: How can a new image of radio be created for young audiences?

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7 There were two groups: one with 14 to 18 years old youngsters and another one with 19 to 24 years old young adults.

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Biography

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