



Illegal Broadcasting

Annex 1: Listening to illegal broadcasting in London

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Section 1

Summary

Background

- A1.1 Ofcom commissioned BMRB to conduct research amongst adults in London. The purpose of the survey was to measure the listenership to illegal radio broadcasters in the London area. The research is based on respondent's *claimed* radio listening and is dependent on their recall. It should not, therefore, be directly compared to the radio industry's official audience survey RAJAR, in which respondents are asked to complete a diary of their radio listening each day.
- A1.2 The survey was the first stage of a two stage study. The second stage focussed on areas in London where the Ofcom's Field Operations team have had to take action most frequently against illegal broadcasters. The report of the second phase of research can be found at:
http://www.ofcom.org.uk/research/radio/reports/illegal_broadcasting/annex2.pdf.

Research objectives

- A1.3 The objectives of this phase of the research were to:
- 1.3.1 Measure claimed listenership to illegal broadcasters;
 - 1.3.2 Identify the demographic profile of illegal broadcast listeners;
 - 1.3.3 Examine attitudes towards illegal broadcast content; and
 - 1.3.4 Measure public concern about interference with emergency services and licensed stations.

Key findings

- A1.4 16% of adults say they listen to illegal broadcasters – 6% referred specifically to a named illegal broadcaster.
- A1.5 Listeners to illegal broadcasts are made up of all age and social groups, with 15-24 year olds and C1C2 socio economic groups the most likely to listen.
- A1.6 Six in 10 Londoners are concerned about interference to the emergency services caused by illegal broadcasters
- A1.7 Unique music content appears to be the main reason for listening to illegal broadcasters.

Methodology

- A1.8 The survey was conducted by BMRB on its face to face omnibus survey in June 2006.
- A1.9 910 adults living in London aged 15+ were interviewed. London was defined as within the M25 motorway for the purposes of this survey.

- A1.10 BMRB's omnibus survey is representative of the GB population by age, gender and socio-economic group.
- A1.11 The error margins on the sample of 910 are approximately +/- 2-3% at the 95% confidence interval.
- A1.12 Some of the data in this report is based on respondents' *claimed* illegal radio listening. The accuracy of our results is subject to (a) a possible reluctance to voice an association with illegal radio, as well as (b) a possible mistaken belief that a station the interviewee listens to is a licensed, rather than an illegal, broadcaster (or vice-versa).
- 1.12.1 The stations listed to respondents represented a mix of legal and illegal broadcasters. The legal stations were: BBC London 94.9, BBC Radio 1, BBC Radio 2, BBC Radio 3, BBC Radio 4, BBC Radio 5 Live, BBC 1Xtra, Capital Gold, Capital Radio, Choice FM, Classic FM, Club Asia, Heart 106.2, Kismat Radio, Kiss 100, LBC 97.3, Magic 105.4, Radio Jackie, Smash Hits, Smooth FM, Spectrum Radio, Sunrise Radio, Talk Sport, The Hits, Time FM, Virgin Radio, Xfm . The named illegal stations were: Afrique FM, Bizim, Deja vu, Flashback, Galaxy FM, Hot 97, Kasapa FM, Lightning FM, Millenium Supreme, Naija, Powerjam, Rinse FM, Station FM, Touch FM, Vibes FM.

Section 2

Findings

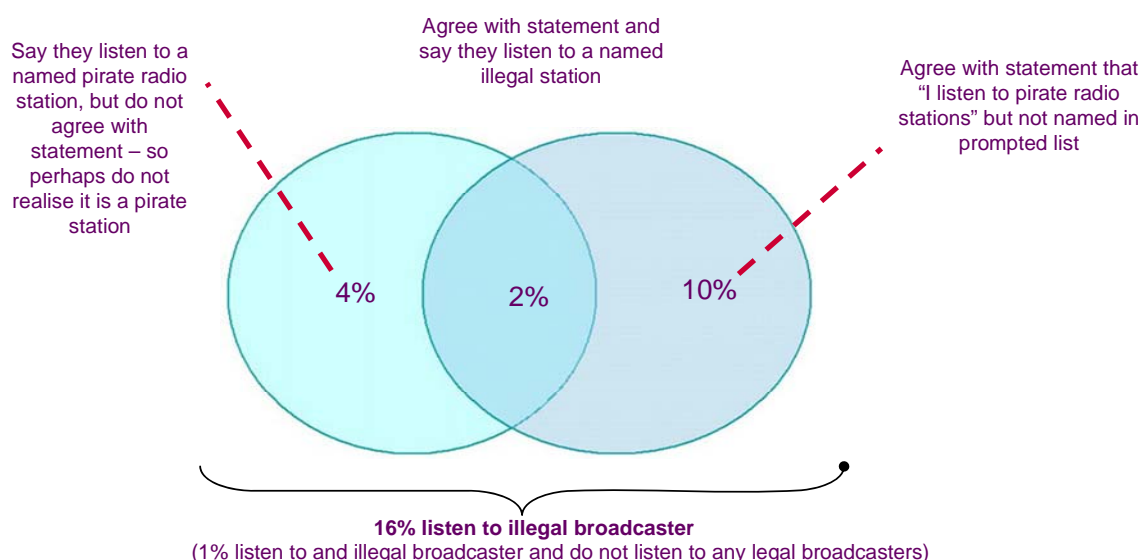
Claimed listenership to illegal radio broadcasters

16% of adults say they listen to illegal broadcasters

A2.1 16% of adults surveyed say they listen to illegal broadcasters – indicated either by specifically naming an illegal station or by agreeing with the statement “I listen to pirate radio stations”. This equates to around 825,000 London listeners aged 10+. The total number of listeners may actually be greater than this, as 13% of adults said that they didn’t know if they listened to an illegal broadcaster. In addition 5% of 7-14 year-olds surveyed on BMRB’s youth omnibus survey said they knew people who listened to pirate radio.

Fig. 1: Proportion of London adults who (say they) listen to illegal broadcasters

Question: Do you ever listen to any of the radio stations listed here? (list contained mix of legal and illegal broadcasters)

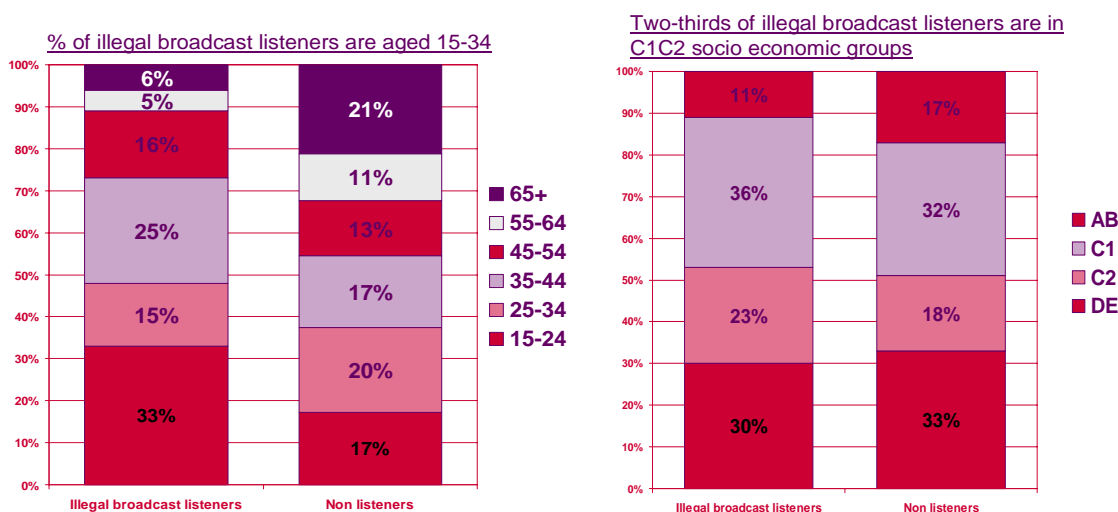


Base: London Adults, n = 910 (error margin at 95% CI = c. +/- 2.4%)

Illegal broadcast listeners are found amongst all age and socio economic groups with a greater than average proportion of 15-24 year olds and C2C2 socio economic groups listening

A2.2 Figure 2 shows that illegal broadcast listeners are made up of all ages and socio economic groups, with a slightly greater proportion of 15-24 year-olds and C1C2 socio-economic groups. There are also indications that listening is more prominent amongst some minority ethnic groups, though the sample sizes achieved do not allow firm conclusions to be drawn on this.

Fig. 2: Profile of illegal broadcast listeners compared to non-listeners



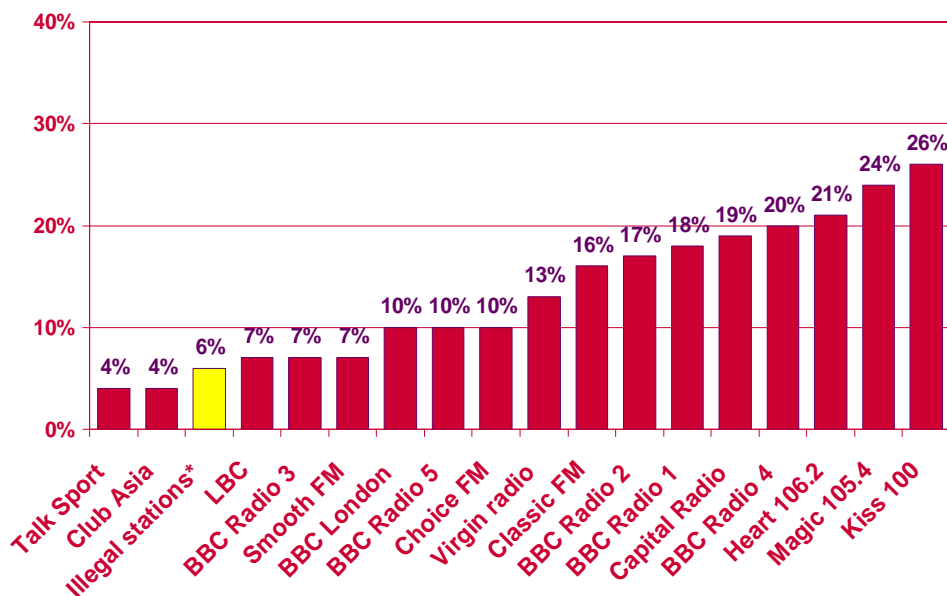
Base: London Adults, n = 910 (error margin at 95% CI = c. +/- 2-4%. Illegal broadcast listeners n = 150; Non-illegal broadcast listeners n = 760.

6% of London adults said that they listened to a named illegal broadcaster

A2.3 After prompting with a list of radio stations that included both licensed broadcasters and illegal broadcasters in London, 6% said that they listened to a named illegal broadcaster. Whilst this data is reliant on respondents' memory and should therefore not be considered as reliable a measure as RAJAR data, it does suggest that as many London adults listen to illegal broadcasts as do to some established licensed broadcasters.

Fig. 3: Named stations listened to in London (treat as indicative, based on respondent memory)

Q: Do you ever listen to any of the radio stations listed here? (list contained list of legal and illegal broadcasters)



A2.4 Nine in 10 (88%) of those who said that they listened to a named illegal broadcaster said that they did so via a traditional radio receiver or a radio receiver on a mobile phone. The remainder either listened online or couldn't remember how they accessed the service.

A2.5 Approximately a quarter (27%) of those who listened to an illegal broadcaster said that they did so weekly or more frequently.

Respondents' opinion on interference issues

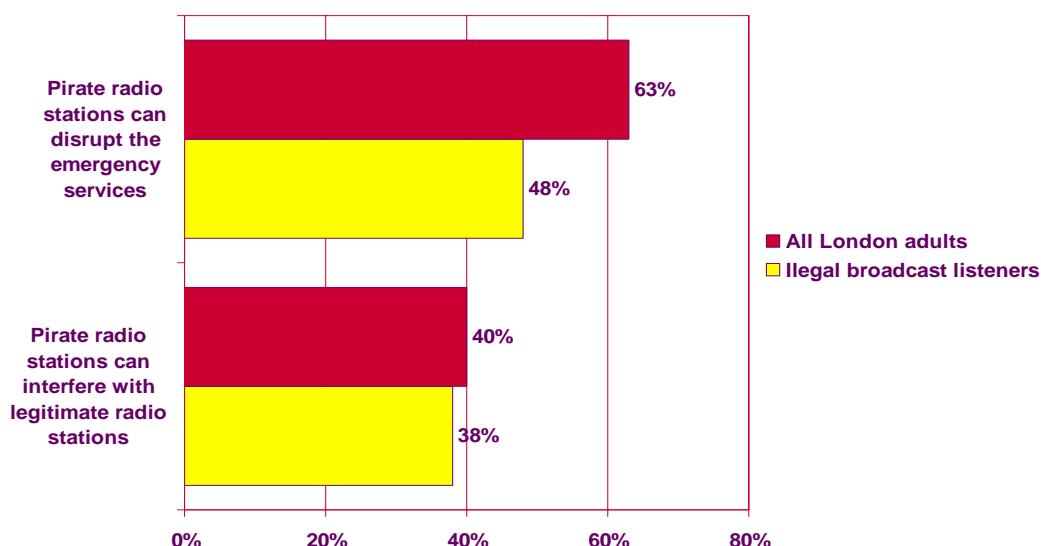
Over 6 in 10 Londoners are concerned that illegal broadcast can disrupt the emergency services

A2.6 63% of London adults expressed concern that illegal broadcasters can disrupt the emergency services. Concern was less marked when it came to interference with licensed broadcasters with 40% of all London adults concerned with this.

A2.7 Amongst listeners to illegal broadcasters, concern about interference with the emergency services is significantly lower. This may be related to scepticism identified in Ofcom's follow up qualitative research that this is a "real" problem (see Annex 2).

Fig. 4: Level of concern about disruption and interference caused by illegal broadcasters

Q: How concerned are you with the following things? Please give a score of 1 to 5, where 1 means "not at all concerned" and 5 means "very concerned"



- Chart shows top 2 box levels of concern (rate 4 or 5)

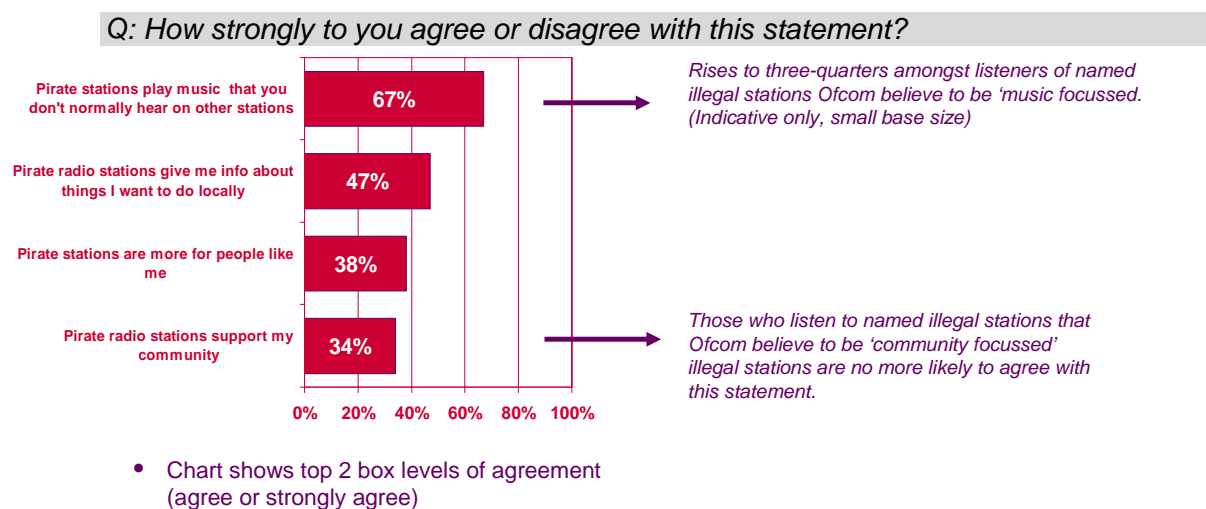
Base: Greater London Adults, n = 910

Reasons for listening to illegal broadcasters

Music content appears to be a main reason for listening to illegal broadcasters

A2.8 Two thirds of listeners to illegal broadcasters agreed that these stations play music that isn't necessarily available on other stations. This appeared to be a more frequently agreed with motivating factor compared to links with community, as shown in Figure 5:

Fig. 5: Level of concern about disruption and interference caused by illegal broadcasters



Base: Greater London Adults that listen/ claim to listen to pirate radio, n = 150

Appendix 1 : Questionnaire

1. Do you ever listen to any of the radio stations listed here?

[A list of illegal and licensed stations was shown to respondents]

2. Are there any other radio stations you listen to more than once a month or so?

3. How often do you listen to [station(s) mentioned]...?

- Every day
- Most days
- Once or twice a week
- Less than once a week
- A couple of times a month
- Less often
- Don't know

4. How do you listen to this/these stations?

- Via a radio
- Via internet
- Via mobile
- Don't know

5. How strongly do you agree or disagree with these statements?

- I don't know whether I listen to any pirate radio stations
- I listen to pirate radio station

- Strongly agree
- Slightly agree
- Neither agree or disagree
- Slightly disagree
- Strongly disagree
- Don't know

6. How strongly do you agree or disagree with this statement?

- Pirate radio stations give me information about things I want to do locally.
- Pirate radio stations play music that you don't normally hear on other stations
- Pirate stations are more for people like me
- Pirate stations support my community

- Strongly agree
- Slightly agree
- Neither agree or disagree
- Slightly disagree
- Strongly disagree
- Don't know

7. How concerned would you say that you are with the following things?

Please give a score of 1 to 5, where 1 means "not at all concerned" and 5 means "very concerned"

- Pirate radio stations are illegal
- Pirate radio stations can disrupt the emergency services
- Pirate radio stations can interfere with legitimate radio services

- 1 Not at all concerned
- 2
- 3
- 4
- 5 Very concerned
- Don't know