



# Illegal Broadcasting

Annex 2: An independent report on listening to illegal  
broadcasting in Hackney, Haringey & Lambeth

Produced for Ofcom by Essential  
Research

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## Section 1

# Executive Summary

## Research objectives

- A1.1 The objectives for the market research were to:
- 1.1.1 Measure accurate penetration and consumption data for illegal radio listening within the London boroughs of Hackney, Haringey and Lambeth;
  - 1.1.2 Build accurate demographic, behavioural and attitudinal profiles of illegal radio listeners within each of the three London boroughs; and
  - 1.1.3 Gain a deeper understanding of consumer motivations for listening to illegal radio and examine the needs that illegal radio stations fulfil vis a vis licensed radio stations.

## Key findings

### **A quarter of adults in Hackney, Haringey and Lambeth say they listen to illegal broadcasters**

- A1.2 Illegal radio broadcasting currently attracts significant audiences across all three London boroughs investigated as part of this research, with an aggregated reach of 24% across all adults aged 14+ living within Hackney, Haringey and Lambeth.
- A1.3 While the reach of illegal broadcasters rises to 27% among males, 30% among those in Lambeth, 37% among students aged 14-24, and 41% among black audiences, the overall demographic profile of its listener base reveals it has much broader appeal.

### **The appeal of illegal broadcasters is driven by ‘grass root’ talent, the urban music scene and minority community groups**

- A1.4 Among all those who listen to illegal broadcasts within the three boroughs, Choice FM and Kiss 100 have the greatest reach of any radio station, highlighting the importance of urban music to this audience.
- A1.5 The thrill of rebelling against the establishment is not in itself a major driver of listening to, or indeed broadcasting, illegal radio.
- A1.6 Our research reveals that illegal radio listening and broadcasting is being driven by the importance of radio as a medium for:
- 1.6.1 the development and promotion of ‘grass roots’ talent;
  - 1.6.2 the urban music scene; and
  - 1.6.3 minority community groups.

### **Listeners to illegal stations have a perception that licensed broadcasters are failing to cater sufficiently for all sections of society**

- A1.7 The perception of both listeners and broadcasters involved in illegal broadcasting is that the licensed broadcasters are failing to cater sufficiently for the needs of the public at large.
- A1.8 There is also a strong audience perception that consolidation within the licensed radio industry has led to a greater divide between the values and output of 'commercial stations' vs. 'pirate stations'.
- A1.9 Illegal radio is perceived by many as the best place to hear new music, and the best place to hear urban music, DJ'ing and MC'ing in general.

### **Illegal broadcast listeners tend to dismiss problems of interference as propaganda from 'the authorities'**

- A1.10 Among those who listen to illegal radio, there is generally little concern about the disruption that might be caused to emergency services or licensed broadcasters, although this does become more of an issue for audiences aged 45+.
- A1.11 Many listeners take the view that such claims are propaganda disseminated by the authorities in a bid to control media ownership.

### **The drivers of illegal broadcasting are unlikely to diminish in the near future**

- A1.12 Our research suggests that illegal broadcasting audiences are unlikely to diminish within the short or medium term, because:
  - 1.12.1 there is little reason to believe that the three key drivers of illegal radio listening and broadcasting (see paragraph A1.6) will become any less relevant in London;
  - 1.12.2 new media and technology would seem to complement, rather than replace, illegal FM broadcasting; and
  - 1.12.3 those who currently listen to illegal broadcasts express little desire to acquire a DAB radio receiver.
- A1.13 Illegal stations are also appreciated for their super-local relevance, which often manifests itself in the form of information and advertisements about local community events, businesses and club nights.

## Section 2

# Methodology and interpretation

### Quantitative research

- A2.1 During September 2006, 1,800 face-to-face street interviews were conducted across the boroughs of Hackney, Haringey and Lambeth among adults aged 14+. All fieldwork was conducted by ORC International.
- A2.2 These boroughs had been selected by Ofcom as they each have a significant number of illegal broadcasters.

**Figure1: Map of London boroughs (highlighted areas indicate the location of fieldwork)**



- A2.3 The majority of interviews were conducted across weekends to ensure adequate representation of different social strata. In addition, interviewing quotas were set across each region, gender, age break and social economic group.
- A2.4 Upon completion of fieldwork, survey results were weighted to the latest ONS census data in order to ensure findings were representative of the overall demographic population of the three boroughs.
- A2.5 The error margins on the full sample of 1,800 are approximately +/- 1-2% at the 95% confidence interval.

## Qualitative research

- A2.6 Further research was undertaken to provide a deeper understanding of consumer motivations for listening to illegal radio broadcasts and identifying where licensed broadcasters may be failing to meet the needs of radio audiences.
- A2.7 Three types of interview were conducted:
- Three consumer depth interviews with accompanied listening
  - 12 consumer friendship triads
  - Five expert depth interviews
- A2.8 As an initial, exploratory stage of the qualitative research, moderated depth interviews were held with three heavy listeners of illegal radio broadcasts. Interviews were conducted in-home and featured a period of accompanied radio listening (using an FM radio receiver).
- A2.9 This stage was followed by a number of expert depth interviews with persons involved in both legal and illegal broadcasting, plus a member of Ofcom's enforcement team.
- A2.10 Finally, a total of 12 friendship triads were held with light, medium and heavy listeners of illegal radio broadcasts from across the boroughs of Hackney, Haringey and Lambeth. Friendship triads are small focus groups, each comprising three participants who are all friends or who know one another. This methodology is particularly suited to research amongst young people, as it helps the participants to feel comfortable within the research environment.

## How the research should be interpreted

- A2.11 Much of our research is based on information about claimed radio listening gathered via face-to-face interviews, hence the accuracy of our results is subject to:
- 2.11.1 a possible reluctance to voice an association with illegal radio; as well as
  - 2.11.2 a possible confusion between illegal and licensed broadcasts.
- A2.12 The results are therefore not necessarily as accurate as studies such as the diary-based RAJAR audience measurement system, which rely less heavily on respondent recall and information collected via face-to-face interviewing.

### Section 3

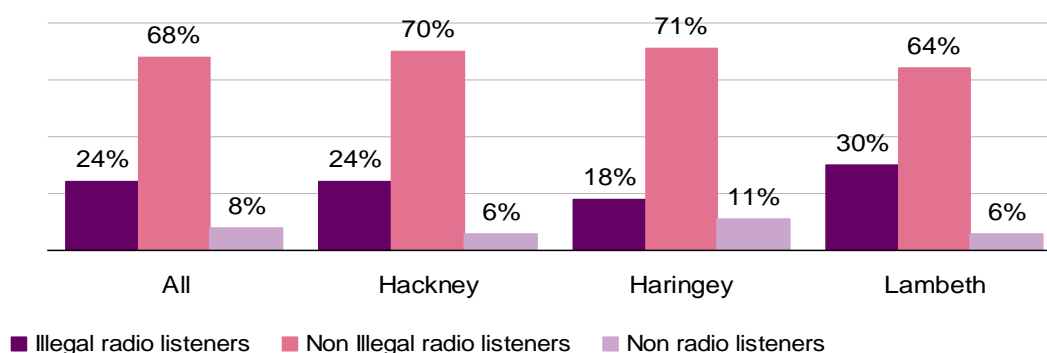
## Key quantitative findings

### Incidence and profile of illegal radio listeners

A3.1 Quantitative survey data reveals that 24% of those aged 14+ living in Hackney, Haringey and Lambeth claim to listen to illegal radio broadcasts.

**Figure 2: Incidence of illegal radio listeners**

*Questions asked: “How often would you say you normally listen to the radio, including listening with a normal radio or through your TV? Do you ever listen to any of the stations here? Are there any other radio stations you listen to more than once a month or so? How often do you think you listen to the following types of radio station?”*

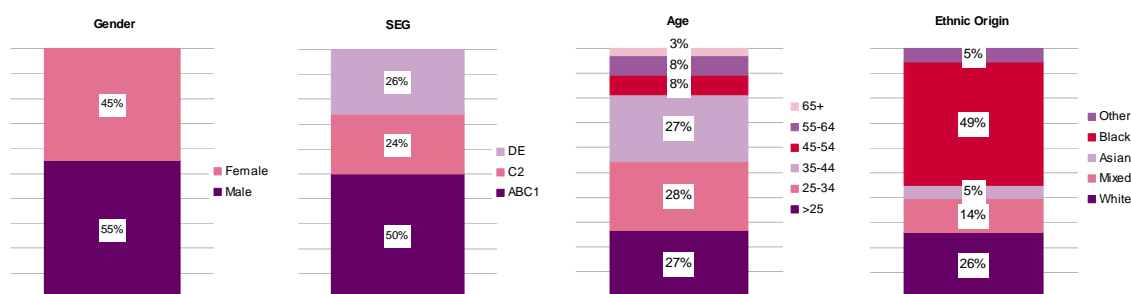


Base: 1,817 interviews with adults aged 14+ across Hackney, Haringey and Lambeth (unweighted)  
 Source: Essential Research / ORC International survey, September 2006

A3.2 These figures are supported by an earlier study by Ofcom and BMRB in which claimed listening to illegal radio was measured at 16% incidence among all adults aged 14+ living in London (see Annex 1 to Ofcom’s report on Illegal Broadcasting). Fieldwork for this study took place in June and July 2006 among 910 adults, excluding the areas of Berkshire, Buckinghamshire, Essex, Hertfordshire, Kent and Surrey.

A3.3 Returning to the quantitative study of radio listeners in Hackney, Haringey and Lambeth, it can be said that while incidence of illegal radio listening rises to 27% among males, 30% among those in Lambeth, 37% among students aged 14-24, and 41% among black ethnic groups, the overall demographic profile of illegal radio listeners reveals it has much broader appeal. This is demonstrated in figure 3.

**Figure 3: Demographic profile of illegal radio listeners**



Base: 464 interviews with illegal radio listeners aged 14+ across Hackney, Haringey and Lambeth (unweighted). Source: Essential Research / ORC International survey, September 2006.

A3.4 Figure 3 demonstrates that illegal radio audiences are made up of all socio economic groups, all ages and a variety of ethnic groups.

### Methods of listening to illegal broadcasts

A3.5 Consumption of illegal radio extends across many platforms and environments, with 63% of listeners claiming to listen via a normal radio, 25% of listeners claiming to listen via a radio on their mobile handset, and 16% claiming to listen via the internet.

### Claimed reach<sup>1</sup> of stations among illegal broadcasting listeners

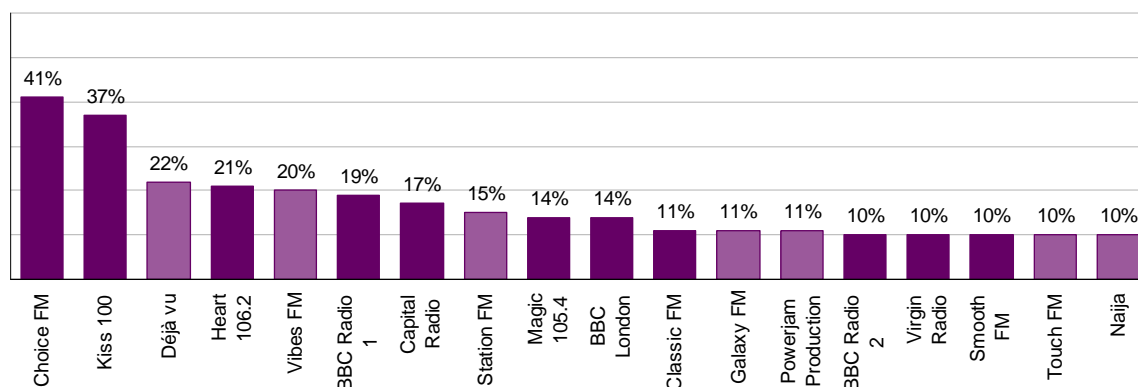
A3.6 Among audiences who listen to illegal radio broadcasts, the two highest reaching radio stations are Choice FM and Kiss 100, licensed commercial stations which feature playlists centred around urban and (in the case of Kiss) dance music (see figure 4). It is noticeable that the urban-focused Choice enjoys a reach almost double that of the most popular illegal station in the survey, Déjà Vu.

A3.7 However, some illegal broadcasters enjoy a greater reach than many licensed stations. Indeed, Déjà Vu (22%) and Vibes FM (20%) have reach figures comparable with the licensed broadcasters Heart 106.2 (21%) and BBC Radio 1 (19%) among this audience. This is despite BBC Radio 1 broadcasting some specialist programming covering urban music genres.

<sup>1</sup> Note: "Reach %" is defined as the proportion of all adults in Hackney, Haringey and Lambeth who listen to any illegal radio station, who claim to listen to the particular radio station in question.

**Figure 4: Reach of stations among illegal radio listeners**

Question: “Do you ever listen to any of the radio stations listed here?” (List contained mix of legal and illegal\* broadcasters) \* Afrique FM, Déjà Vu, Flashback, Galaxy FM, Hot 97 UK, Kasapa FM, Lightening FM, Naija, Powerjam, Rinse FM, Station FM, Touch FM, Vibes FM.  
 Question: “Do you agree that ‘I listen to pirate stations?’” Base: London Adults, n = 910 (error margin at 95% CI = c. +/- 2).



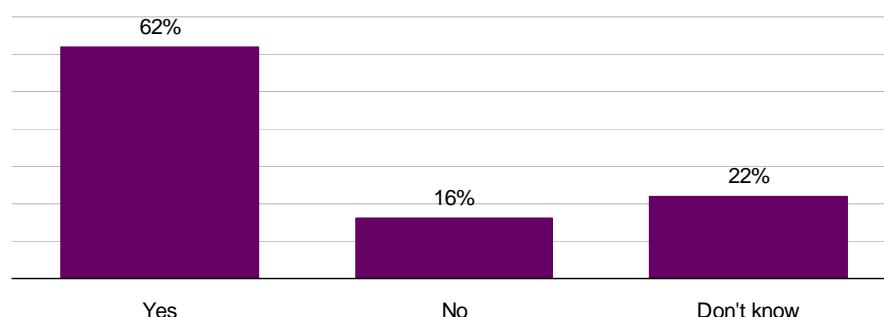
Base: 464 interviews with illegal radio listeners aged 14+ across Hackney, Haringey and Lambeth (unweighted) Source: Essential Research / ORC International survey, September 2006.

**Perceptions of illegal vs. licensed commercial broadcasters**

A3.8 There is a consensus amongst illegal radio listeners (62%) that illegal radio stations offer something different to licensed commercial stations.

**Figure 5: The majority of listeners to illegal stations perceive that illegal radio offers something different to licensed commercial radio**

Question: “In your opinion, do illegal radio stations offer anything different to licensed commercial stations?”

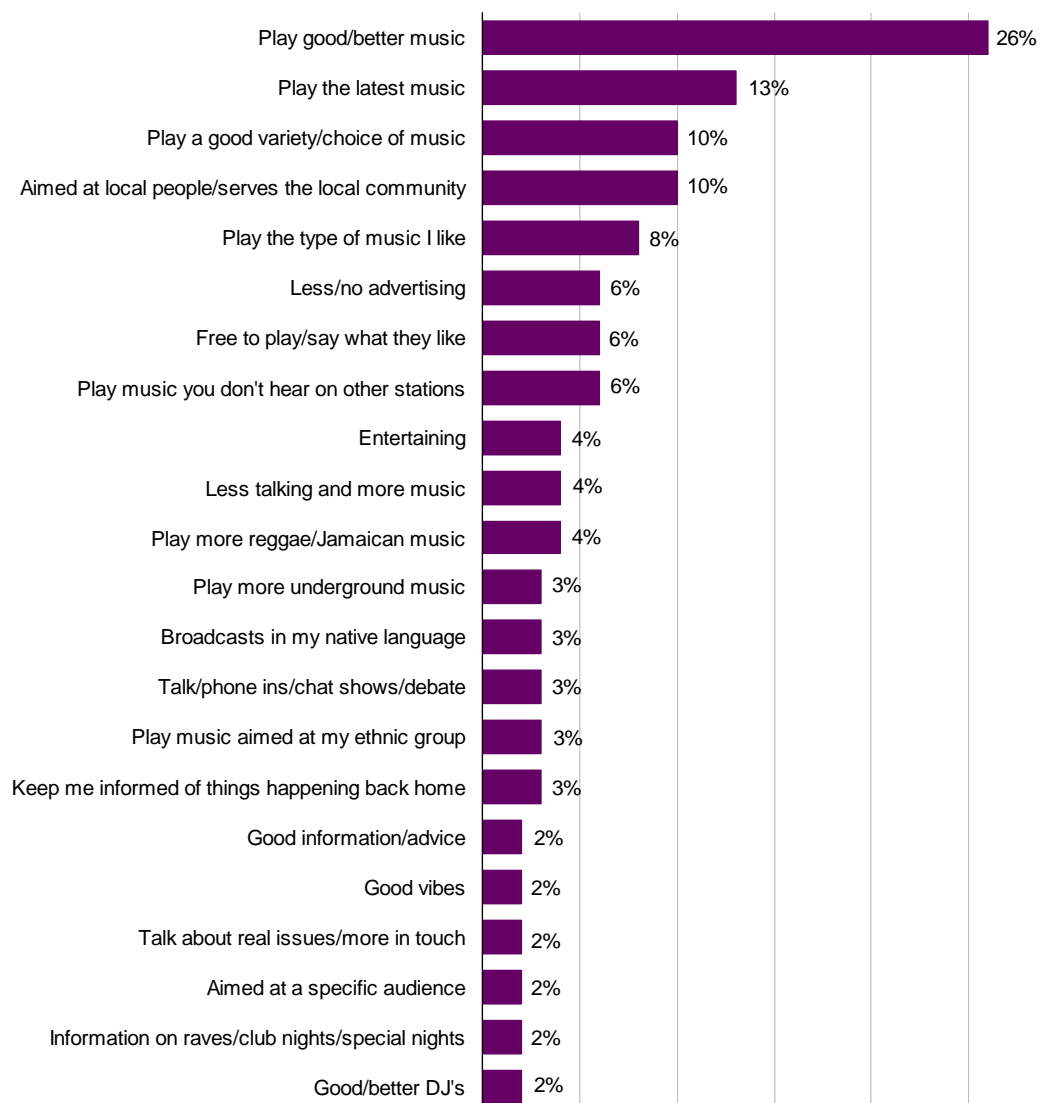


Base: 464 interviews with illegal radio listeners aged 14+ across Hackney, Haringey and Lambeth (unweighted). Source: Essential Research / ORC International survey, September 2006.

A3.9 Among those who believe that illegal radio stations offer something different to licensed commercial stations, music is a key differentiator with 26% agreeing that illegal stations play ‘good or better’ music than licensed commercial stations and 13% agreeing that illegal stations provide a better source of the latest music.

**Figure 6: Spontaneous perceptions of illegal radio stations**

*Question: “In your opinion, do pirate radio stations offer anything different to licensed commercial stations? If yes: what do they deliver that is different?”*



*Base: 464 interviews with illegal radio listeners aged 14+ across Hackney, Haringey and Lambeth (unweighted). Source: Essential Research / ORC International survey, September 2006.*

A3.10 10% of illegal broadcast listeners thought that the illegal broadcasters were better aimed at their local community than licensed commercial stations. Other reasons why listeners to these stations thought they were better than licensed commercial stations was the variety of music and the lack of advertisements. For other characteristics, such as providing information and debate, very few listeners thought that the illegal broadcasters were better than licensed stations.

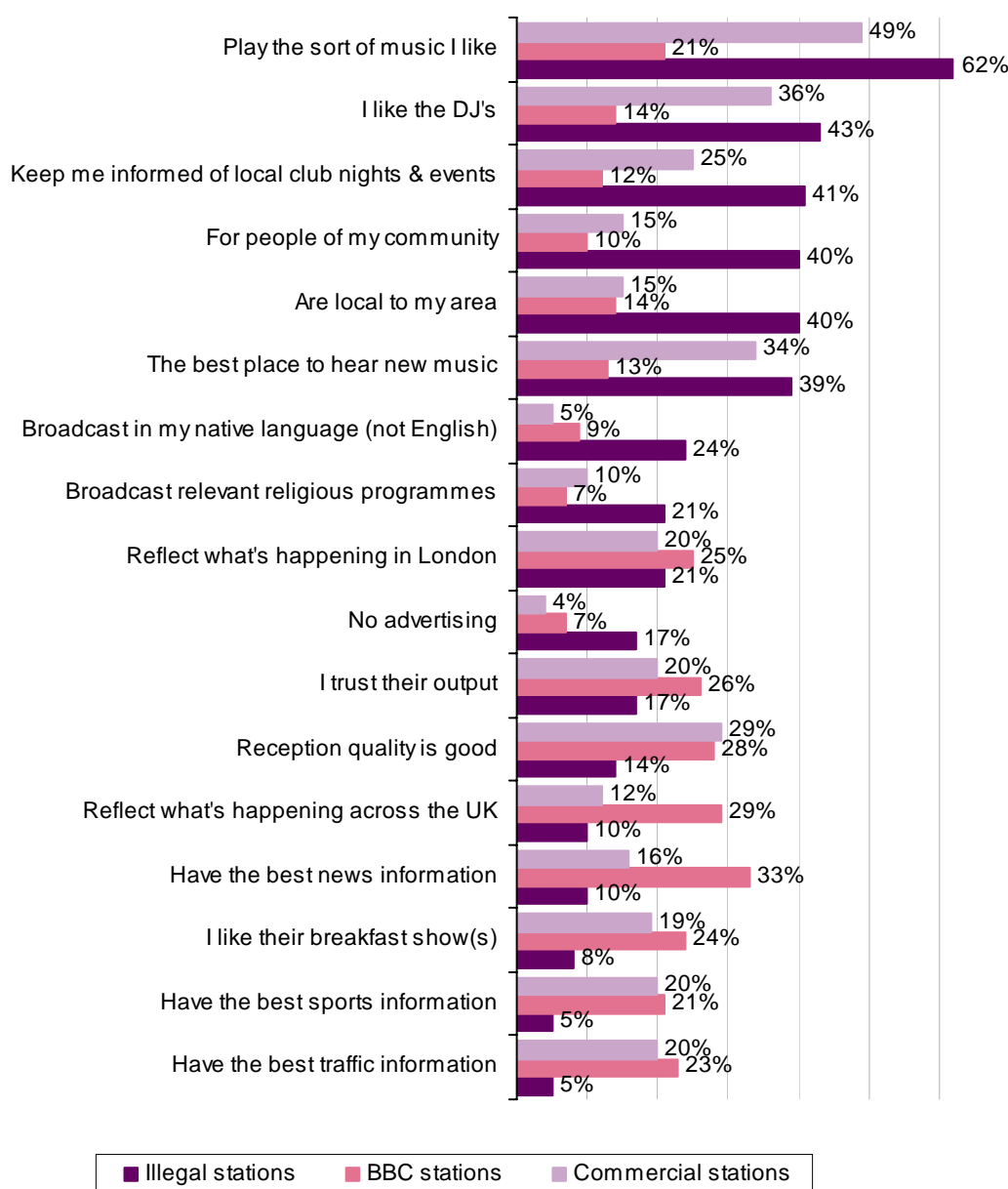
## Motivations for listening to different types of radio station

### Illegal stations vs. commercial stations vs. BBC stations

A3.11 The research reveals that illegal radio has distinctive drivers of appeal when compared with BBC and commercial radio stations.

**Figure 7: Motivations for listening to different types of radio**

*Question: “What are your main reasons for choosing to listen to illegal, BBC and commercial radio stations?”*



*Base: 464 interviews with illegal radio listeners aged 14+ across Hackney, Haringey and Lambeth (unweighted). Source: Essential Research / ORC International survey, September 2006.*

A3.12 Figure 7 shows the proportion of illegal station listeners who agree with each statement in relation to either illegal, BBC or commercial radio stations. It

demonstrates that there are a number of key drivers for listening to illegal stations (note: these figures relate to reasons for choosing to listen among those who listen to illegal stations, rather than across all radio listeners):

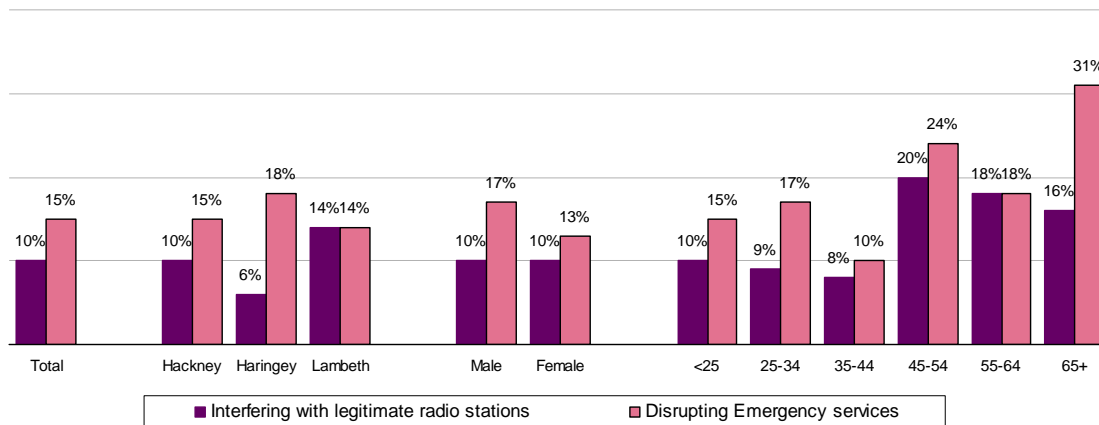
- 3.12.1 The highest scoring reason for listening to illegal stations was that they “play the sort of music I like”. This was given as a reason for listening by 62%, compared to 49% of those who also listen to commercial radio. 21% listeners to illegal stations said they tuned into BBC stations to hear the sort of music they like.
- 3.12.2 The results were similar for those who tune-in to hear DJs they like (39% of illegal station listeners cited this as a reason for listening to illegal stations, while 36% of them gave this as a reason for listening to commercial radio and 14% gave this as a reason for listening to BBC stations) and for being the best place to hear new music (39% illegals, 34% commercial, 13% BBC).
- 3.12.3 The areas where illegal stations scored significantly higher than licensed commercial stations amongst illegal station listeners were in:
  - a) providing information about local club nights and events (41% illegals, 25% commercial and 12% BBC)
  - b) being for “people of my community” (40% illegals, 15% commercial, 10% BBC); and
  - c) being “local to my area” (40% illegals, 15% commercial, 14% BBC).
- 3.12.4 Some 21% of those tuning into illegal stations cited broadcasting relevant religious programmes as a reason for listening, compared to 10% of this group who listen to commercial radio for this reason and 7% of those choosing to listen to the BBC.
- 3.12.5 17% of illegal station listeners choose to listen to them because of the lack of adverts.
- 3.12.6 Provision of programmes in languages other than English was also important to some. 24% claimed to listen to illegal stations for this reason, compared to only 5% for commercial radio and 9% for the BBC.

### **Public concerns about illegal radio**

- A3.13 Among those who listen to illegal radio, there is relatively little concern about disruption to legitimate stations which might be caused by such broadcasting (Figure 8).
- A3.14 Audience concerns are significantly greater when considering possible disruption of emergency services as opposed to interference with licensed radio broadcasters.
- A3.15 Additionally, those aged 45+ are significantly more likely to be concerned about either form of disruption.

**Figure 8: Concerns about possible disruption caused by illegal broadcasting**

Question: “How concerned are you with the following things? (1) Interfering with legitimate radio stations; (2) Disrupting emergency services. Please give a score from 1 to 5 where 1 means not at all concerned and 5 means very concerned”. Data in the chart refers to all of those scoring 4 or 5 as a percentage of all respondents.



Base: 464 interviews with illegal radio listeners aged 14+ across Hackney, Haringey and Lambeth (unweighted). Source: Essential Research / ORC International survey, September 2006.

## Section 4

# Key qualitative findings

## Radio consumption in context

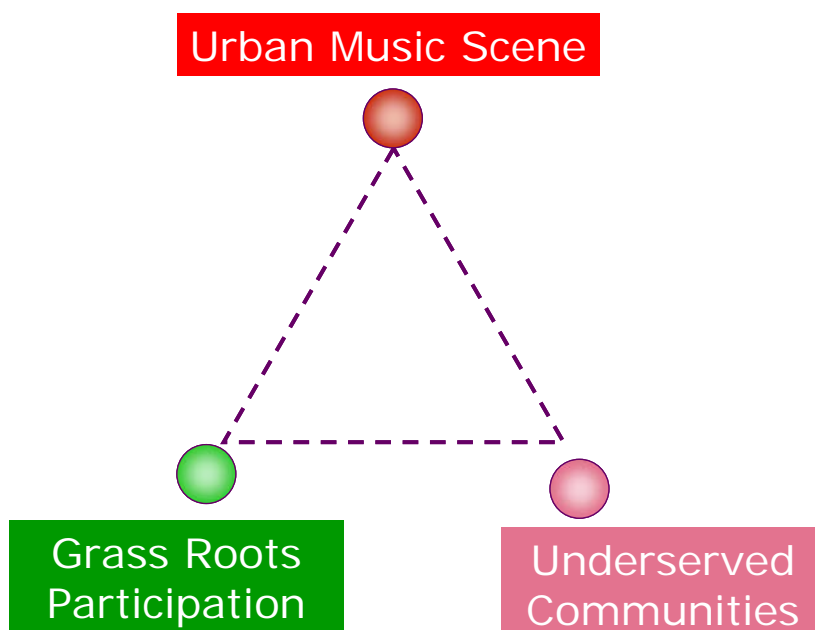
- A4.1 The research sought to understand the specific appeal of illegal broadcasting and place it in the general context of people's lives and their broader media consumption.
- A4.2 As such, we identified a minimum of nine key roles that radio is performing in the everyday lives of our respondents:
- **Egg-timer media:** Helps me conduct automated tasks/rituals within a set time.
  - **Distraction from the here and now:** Takes my mind off a situation (e.g. a journey) I can't avoid.
  - **Soundtrack to my life:** Provides a musical backing track while I am engaged in other tasks.
  - **Companionship:** Keeps me company when I am alone.
  - **Special Interest:** Gives me information and advice on subjects that I am interested in, such as niche music genres.
  - **Community:** Helps me feel part of a community and informs me about relevant community news and events.
  - **Event coverage:** Provides coverage of live events so I can share the experience without physically being there.
  - **Information updates:** Gives me short information bursts on subjects that I have an immediate interest in.
  - **Mood enhancer:** Lifts me up and makes me feel good. Especially when I am getting ready to go out.
- A4.3 The research also revealed that the personal appeal of DJs and presenters is much more important on the radio than on TV.

“Cos you form a relationship with them, it's like they're your friends almost, so if you were to meet them you'd feel like you already knew them.” *Brixton, Male, 25-29* “I can socialise with these people on the radio and it's like I'm part of them. They're in my space, they're in my house, my room, my kitchen, my bathroom. It's my friends that I can't see.” *Haringey, Female, 35-44*

## The key drivers of illegal radio broadcasting and listening

- A4.4 We identified three main drivers for listening:

**Figure 9: The key drivers of illegal broadcasting and listening**



### 1. The Urban Music scene

- A popular and largely youth-oriented culture based around ‘urban’ music genres such as Hip Hop, Jungle and House.

### 2. Grass roots participation

- Young talent (artists, DJs, presenters), in search of recognition, an audience and, ultimately, a career opportunity.

### 3. Under-served communities

- Communities whose everyday needs and interests are passed over by mainstream media.

A4.5 Our research indicates that the illegality of illegal radio is not, in itself, a major driver of listening, and nor, indeed, is it a major driver of involvement in the supply side of illegal broadcasting.

A4.6 The driver appears to be not the ‘pull’ factor of ‘piracy’ but rather a ‘push’ factor: listeners are pushed into the illegal market by the perceived failure of licensed broadcasters to cater adequately for the needs of people from these three interest groups in particular.

## Section 5

# Qualitative segmentation of illegal radio audiences

## Background

- A5.1 In exploring the causes of illegal radio listening, it became clear there were a number of different audience sub-sets, each with different characteristics and different needs. The qualitative phase of this research enabled us to better understand and better define each of these audience groups so that we could arrive at a basic segmentation of illegal broadcasting audiences.
- A5.2 Broadly speaking, our research revealed that younger audiences are largely drawn towards illegal broadcasting through their identification with the urban music scene. These are, typically, dedicated urban music ‘scenesters’.
- A5.3 Meanwhile, older listeners typically belong to one of the following three groups:
1. ‘Youth connected’: typically mature ‘urban music scenesters’
  2. ‘Community connected’
  3. Non-English speakers or those for whom English is a foreign language.
- A5.4 On the following pages we give a detailed profile of the listener groups.

## Urban Music Scenesters

A5.5 This group are core listeners to illegal broadcasting and will typically refer to it as 'pirate radio'. They are heavily involved in 'black' musical genres (R&B, Hip Hop, Garage, Basement, Grime, Drum & Bass, House, Old School) but they can be of any ethnicity. They are gregarious, typically mixing with a very extensive group of friends who attend the same musical events and listen to the same illegal radio stations. They are young: likely to be between the ages of 15 and 34, and unlikely to have children.

### Urban Music Scenesters

- Heavy listeners of illegal broadcasting, usually referring to it as 'pirate radio'.
- Likely to be aged 15-34 with no children.
- Can be of any ethnicity.
- Heavily into urban music – watch MTV and Channel U, read music magazines (e.g. XXXL), surf YouTube and MySpace.
- Frequently go to nightclubs, raves and urban music events.
- Music tastes include: R&B, Hip Hop, Garage, Basement, Grime, Drum & Bass, House, Old School.
- Use a lot of technology and media, including: broadband internet, games consoles, mobiles with FM radio, portable games consoles, digital TV, etc.
- Listen to illegal radio to hear about new artists and tracks, to hear good technical DJ sessions/mixes, and to find out about urban music events. Perceive that commercial stations are linked with/play what the major record companies want them to play.
- Perceive that commercial stations are linked with/play what the major record companies want them to play
- Likely to have lots of friends who go to the same music events and listen to the same illegal stations.
- Often know people involved in illegal radio broadcasting.
- Likely to want to phone/text illegal radio broadcasters for music requests, 'rewinds' and 'shout-outs'.
- Perceive illegal radio listeners as being 'cooler' than people who listen to licensed radio stations. They describe licensed radio listeners as "*trainspotters*"; and as illegal radio listeners they think and speak of themselves as being '*street*', '*underground*', '*trendy*'; as being '*in*' rather than '*out*'.
- Enjoy hearing live urban music events (e.g. DJ sessions) played back on air (often because they were there).

## Community Connected Audiences

A5.6 A typical member of this group grew up listening to reggae and soul on illegal radio with their parents. A strong cultural and ethnic esprit de corps makes this group appreciative of the community radio type of service: the attraction to this group of illegal radio lies in the cultural relevance of the musical playlist and the DJs and presenters, and of the local character and ethnic flavour of the news, information, and debate.

### Community Connected Audiences

- Heavy listeners of illegal broadcasters – refer to them as ‘Community Radio’.
- Likely to be 35+ with kids.
- Minority ethnic backgrounds.
- Many have been listening to illegal radio since they were small children because they grew up with their parents listening to it.
- Community Radio is appreciated because of its cultural relevance in terms of: music playlist, DJs and presenters, news, information, and debate.
- Most enjoy listening to R&B, Reggae, Soul.
- Likely to read local/community press, e.g. ‘The Jamaican Gleaner’ and ‘The South London Press’.
- ‘Rice & Peas’ radio on Sunday is a ritual for many of Afro-Caribbean origin.
- Likely to listen to: Lightning, Roots, Vibes, Powerjam, RJR or Station FM.

“Where commercial radio represents the nation, pirate represents communities”  
*Hackney, Female, 35-44*

## Youth Connected Audiences

A5.7 This group consists largely of those who have graduated from being Urban Music Scenesters through becoming older and having children. Their musical tastes have become more mainstream, they may no longer be actively involved in the urban music scene, and they may have attended their last ‘rave’, but they still appreciate what they refer to as ‘pirate’ radio for the musical and emotional connection it provides to their youth.

### Youth Connected Audiences

- Light/medium listeners of illegal broadcasters – refer to them as ‘pirate radio’.
- Likely to be 25-44 and have kids.
- Likely to be white British.
- Graduated from being Urban Music Scenesters since becoming older and having kids – music tastes have become more mainstream and/or they are no longer actively involved in the urban music scene (i.e. have stopped going to nightclubs, raves, etc).
- ‘Pirate’ radio provides a connection to their youth – allowing them to listen to music they listened to when they were younger, e.g. Blue Beat, Reggae, Skank and Ska, Jungle, Drum & Bass, House.
- Otherwise their listening tends to be quite mainstream, e.g. Capital, Heart.
- Would like licensed stations to cater to their tastes more, e.g. Goldfinger’s slot on BBC Radio 1 on Saturday night.

## Non-English speaking audiences and those for whom English is a foreign language

A5.8 Such listeners were not a focus of this research, but one might assume their needs centre around receiving broadcasts in their native language, and listening to news, current affairs and religious programming relating to their country and/or faith of origin.

### Perceptions of illegal vs. licensed radio broadcasts

A5.9 Our research reveals that there is a significant perceptual divide between the output and values of illegal radio stations and licensed radio stations. While this applies less to Kiss, 1Xtra and Choice FM, these stations were nonetheless perceived as having more in common with licensed stations than illegal stations.

A5.10 The greatest perceived differences between illegal and licensed radio broadcasters are set out below in the five broad contexts: Music, DJs and Presenters, Cultural and Geographical References, Listener Interaction, and Core Values.

### Perceptions of the music on licensed and illegal radio

A5.11 Listeners rated illegal broadcasters’ music playlists over the licensed counterpart for both breadth and depth, and clearly identified the illegal broadcasters as the ‘champions’ of innovative music and new talent. The table below shows the attributes the listeners most associated with each type of radio station:

**Table 2.31**

| Licensed Radio            | Illegal Radio                   |
|---------------------------|---------------------------------|
| Mainstream                | Vintage classics                |
| Established artists       | Latest Urban music              |
| Safe                      | Depth                           |
| A-sides                   | New/unsigned artists            |
| Limited playlist          | Risky                           |
| Not enough Music          | More airtime dedicated to music |
| Predictable               | B-sides                         |
| Dictated by record labels | Unpredictable                   |
|                           | Dictated by DJs                 |

“The underground, pirate radio DJs would be slightly more aware of what’s up and coming” *Lambeth, Male, 20-24*

### Perceptions of the DJs & presenters on licensed and illegal radio

A5.12 Listeners identified much more closely with the DJs and presenters on illegal stations, labelling commercial radio DJs in particular as “white, middle class”, or “patronising”.

**Table 2.32**

| Licensed DJs seen as:                                                                              | Illegal radio DJs seen as:                                                                            |
|----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| Showbiz celebs<br>Professional presenters                                                          | Music experts<br>From the streets<br>Passionate, amateur presenters                                   |
| White, middle class<br>Not people like me<br>Patronise people who call in<br>Speak formal language | Younger<br>People like me<br>Respect people who call in<br>Speak my language (more informal/personal) |
| Unable to mix                                                                                      | Able to mix                                                                                           |

“They’re in the community and they know what they’re talking about.”  
*Hackney, Male, 35-44*

### Perceptions of listener interaction on licensed and illegal radio

A5.13 Listeners appreciated the ‘interactivity’ or audience participation which illegal broadcasters can extend to their audiences.

**Table 2.33**

| Licensed                                                     | Illegal                                                                                                            |
|--------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Inaccessible - you won’t get through if you call in          | Accessible: You will get through if you call                                                                       |
| No rewinds                                                   | Shout outs and rewinds                                                                                             |
| DJs patronise callers                                        | DJs respect callers                                                                                                |
| Competitions with big prizes – but low likelihood of winning | Amateurish – listeners often can’t hear callers<br>Competitions with small prizes but higher likelihood of winning |

“What you get with the pirates is you get a reload, where either people are calling in or the DJ just knows that it’s a big track so let’s rewind it. You don’t get that on Kiss or Choice.” *Lambeth, Male, 25-29*

“MCing, that’s very popular. That’s one of the attractions, you can phone up, you can say your little verse and you might get invited to a rave weekend to perform.” *Haringey, Female, 25-29*

### Perceptions of the cultural and geographic references on licensed and illegal radio

A5.14 News, information and debate on illegal stations was seen as more ‘relevant’ than licensed programming, although not necessarily as more ‘reliable’ as a source of news on broader national or international issues.

**Table 2.34**

| Licensed broadcasters are seen as                                                                                                                | Illegal broadcasters are seen as                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Focusing on national news issues<br>From the white, middle class community<br>Offering a mainstream perspective on issues of national importance | Focusing on local community news<br>Providing information on local events<br>A platform for debate about relevant community 'issues' |

“Pirate stations are closer to you and your life” *Haringey, Male, 20-24*

### Perceptions of the core values of licensed and illegal radio

A5.15 Illegal broadcasting is broadly perceived as being ‘for music’ or ‘for the community’ whereas licensed commercial stations are perceived as ‘corporate’ and ‘money-centric’.

**Table 2.35**

| Licensed                                                                                                                  | Illegal                                                                                                    |
|---------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| Corporate<br>Mainstream<br>About money<br>Predictable/structured<br>Dishonest/hidden agendas<br>For the broader community | Grass roots<br>Underground<br>About music<br>Unpredictable/unstructured<br>Honest<br>For micro-communities |

“I think the people on pirate radio stations they play music for the love of music. Not for the love of money.” *Haringey, Female, 20-24*

“The commercial stations play more or less the same type of music - which I think is probably dictated by the record companies.”  
*Haringey, Male, 35-44*

A5.16 These perceived differences are summarised in tables 2.31 to 2.35. The comments, sound-bites and epithets listed here were, in most cases, taken verbatim from the interviews conducted as part of this research.

### Concerns about illegal radio broadcasting

A5.17 Concerns about illegal radio broadcasting tended to be acknowledged more by older listeners. The concerns fall largely into three categories: **Production values**

A5.18 Listeners complained of technical irregularities and disruptions on illegal stations, apparently due to poor organisational skills: we heard of CDs being continuously replayed, or allowed to ‘jump’ for extended periods, and of unscheduled station downtimes caused by the late arrival of individual DJs.

“Sometimes you get static on pirate radio stations because the DJ just hasn’t turned up!” *Haringey, Male, 35-44*

### Reception quality

A5.19 Listeners cited illegal stations’ frequent on-air appeals for outage reports and feedback on reception quality in general as evidence of a chronic difficulty in meeting basic technical standards.

### Harm and offence - Foul or inappropriate language

A5.20 Some listeners claim to have heard instances of illegal radio presenters using language and discussing subject matter that they deemed offensive. However, the general perception is that this behaviour is confined to a minority of illegal radio stations – and that most illegal radio stations try to maintain basic standards of taste and decency in order to avoid undue attention from the authorities.

A5.21 A more widespread issue is the broadcasting of records and live MC sessions which feature explicit language. While the majority of listeners do not perceive this to be a negative aspect of illegal radio broadcasting, many agreed that this would not be suitable material for children to listen to.

### Interference with Public Service channels

A5.22 Most listeners dismiss claims of interference problems as ‘propaganda’ disseminated by the authorities.

“I didn’t think it was [illegal] until I heard police would raid these stations and because I mean they’re not doing much damage to be honest. I mean there’s a million and one other things they could be doing they could be breaking the law in other ways.” *Haringey, Male, 35-44*

“I’ve got no problem with it. All they’re doing is broadcasting music what people wanna hear.” *Hackney, Female, 25-29*

“I feel sad that sometimes when I do find a favourite pirate station, that the department of radio evil people, block it.” *Hackney, Male, 35+*

### Perceptions of existing licensed ‘urban music’ broadcasters

A5.23 Our research revealed a perception among many illegal radio listeners that their needs were not being met by the licensed radio industry. Several established licensed urban music radio stations were cited as having limited relevance and appeal. Such stations were perceived as:

- Having sold out / gone mainstream over time
- Conforming to a limited, mainstream playlist of big name artists and current Top 40 singles
- Giving DJs limited control over what they can play
- Carrying too many adverts
- Playing “pop” / “cheesy” music
- Editing songs / not playing songs the full way through

- A5.24 Indeed, the perceived decline of licensed urban music radio broadcasting appears to have strengthened loyalties towards illegal radio broadcasting.
- A5.25 This said, our research revealed that the BBC's 1Xtra is perceived by many illegal station listeners as being a credible alternative to illegal radio.
- A5.26 While we found limited awareness of the station, those who had listened appreciate it for many of the qualities associated with illegal radio.
- A5.27 However, its lack of FM broadcast signal makes it significantly less attractive to many would-be listeners who do not have access to DAB radio.

“If it was on FM I would probably listen to that over Choice.”  
*Hackney, Female, 25-29*

“I think it's very beneficial for the UK scene...I think it's the best station there...It does keep you up to date with news with TX but it's just, it's not on the FM dial.” *Lambeth, Female, 15-19*

### **Demand for illegal broadcasting is unlikely to diminish in the near future**

- A5.28 The three main drivers of illegal radio listening are likely to remain relevant for some time:
- 5.28.1 The popularity of the urban music scene and the listening public's identification of illegal broadcasting as the 'home' of this genre.
  - 5.28.2 Young people seeking involvement in music as artists or DJs will continue to see illegal radio stations as their best chance of 'breaking into the industry'.
  - 5.28.3 There is likely to be an increase in the number and diversity of minority/under-served communities living in the UK whose interests are unlikely to be catered for sufficiently by mainstream commercial media.
- A5.29 New media and technology would seem to complement – rather than replace – illegal FM radio broadcasting. Internet streaming and DJ MySpace sites are extending and strengthening the relationship between listener and FM radio station without succeeding the FM channel as the chosen medium of listening.
- A5.30 The illegal radio listeners that we spoke to expressed little desire to purchase DAB receivers. The following reasons were frequently cited:
- Financial cost
  - Lack of perceived benefits
  - Apparent loyalty to FM radio as a medium

### **The insider's perspective on the illegal radio industry**

- A5.31 Four 75-minute interviews were held with experienced broadcasters whose careers had begun, and in one case still remained, within illegal radio.
- A5.32 Interviewee 1 had been drawn to illegal radio by a passion for radio as a broadcast medium. After some years as a 'pioneer' illegal broadcaster he and his colleagues purchased an existing FM licence. He claims that there is plenty of spectrum

available that could be made available for currently illegal broadcasters, but believes that the spectrum has been mismanaged through adherence to unnecessarily strict planning standards, and a desire to protect existing commercial stations from further competition.

- A5.33 Interviewee 2 went into illegal broadcasting as a means of promoting and sharing the – at that time – minority reggae musical genre. A professed loyalty to his local community and to non-commercial values, rather than a loyalty to illegal broadcasting per se, continues to deter him from seeking a licence.
- A5.34 Interviewee 3 went into illegal broadcasting as a consequence of his interest in more recent ‘underground’ musical genres. He has since moved into licensed broadcasting.
- A5.35 Interviewee 4 had strong ambitions to work as a radio presenter. When, according to his account, his applications to licensed stations were ignored, he turned to illegal stations. Finding an opening into established illegal stations slow in coming, he started his own illegal station and became a well-known presenter. He has since found employment with a licensed station.
- A5.36 Note: an additional interview was held with a senior member of Ofcom’s radio investigations and enforcement team.
- A5.37 We found the following three broad points representative of expert opinion in general:

### **A springboard to legitimate success**

- A5.38 The difficulties of breaking into the mainstream were frequently cited by all interviewees as a driver of illegal broadcasting. There appears to be a generally held view amongst those involved in unlicensed broadcasting that the existing radio licence application process is unfair and discriminatory against those from less affluent and less educated backgrounds.
- A5.39 However, a previous career in illegal broadcasting is not seen as a barrier to entry for licensed broadcasting; indeed in some instances it is perceived as the sole realistic means of entry. According to expert opinion the following represents the general public perception of illegal broadcasting:
- The ‘home’ of emerging ‘underground’ musical genres
  - A proven career path for artists and DJs, e.g. Dizzee Rascal
  - The first stop for ambitious, disadvantaged youth
  - An accessible starting point for a career in licensed broadcasting

### **Community radio**

- A5.40 There was a consensus amongst our expert interviewees that illegal radio performed a community function which licensed stations could not, or would not, address. According to the experts we spoke to, illegal radio is:
- The first stop for community-oriented radio enthusiasts
  - A platform for educating youth against crime
  - Fundamentally self-regulating
  - Offers enthusiasts an ‘ethical’ and value-driven alternative to licensed radio
  - Offers an alternative to the ‘red tape’ of acquiring a licence

- Offers the sole route into broadcast radio for those from disadvantaged backgrounds
- Serves a local need, which commercial broadcasting by its very nature will be unable to fulfil
- Frequently performs vital social functions, e.g. by passing information and appeals from the Police to areas of the community inaccessible or hostile to mainstream sources

## **Crime and punishment**

A5.41 All four experts stressed that the ‘illegality’ aspect had at best only a short-term appeal to the majority of contributors to illegal broadcasting. Other opinions and observations expressed by the interviewees include:

- Law enforcement agencies ‘turn a blind eye’ to some illegal broadcasters
- The police use illegal broadcasters as an ‘unofficial broadcasting channel’ for appeals for help in solving or attacking crime
- The penalties for illegal broadcasting are not seen as a compelling deterrent
- ‘Responsible’ illegal broadcasters represent no significant threat to the integrity of emergency service channels

## **The illegal broadcast listener’s take on ‘improving’ licensed radio**

A5.42 We noted above that the illegal broadcasting industry appears to owe its popularity to the perceived failure of licensed broadcasters to address the needs of radio listeners, rather than to some ‘cult’ status conferred upon it by its illegality.

A5.43 When we asked illegal broadcast listeners for their views on how to make licensed radio more attractive their answers fell into five broad categories, which we took as the basis for the comparisons earlier in this report.

A5.44 Broadly, listeners to illegal radio told us that they would be more likely to migrate to licensed radio if the playlists were less ‘mainstream’, if the DJs and presenters were more ‘street’, and if programming lent itself more to audience participation.

A5.45 There is a consensus across the three listener groups we identified above that licensed radio as a whole needs to focus on seeking out (and giving a chance to) local and specialist talent.

## Satisfying illegal radio listeners

### Urban Music Scenesters

Any licensed radio station seeking to attract this audience must:

- Position itself as an independent 24-hour London urban music station
- Focus on music not talk
- Showcase new and emerging artists
- Play a wide variety of urban music (not just current big hits)
- Employ and develop a range of younger/fresher DJs and presenters – people who know the scene and are passionate about the music
- Mix tracks – don't just play them
- Encourage listener interaction/participation
- Promote (and have a presence at) urban music events
- Feature adverts for youth orientated brands, products and services
- Broadcast DJ sets from nightclubs and urban music events

### Community Connected Audiences

Any licensed radio station seeking to attract this audience must:

- Target a specific minority ethnic community in London
- Position itself as an independent London community radio station
- Play a variety of music relevant to the community with a good mix of current and classic artists and tracks
- Feature relevant community news, information and debate
- Employ experienced DJs and presenters from within the community
- Encourage listener interaction/participation
- Promote (and have a presence at) local community events, e.g. Caribbean barbecues, etc
- Feature adverts for local community businesses and services

### Youth Connected Audiences

Any licensed radio station seeking to attract this audience must:

- Dedicate significant amounts of airtime to playing 'classic' urban music tracks
- Create slots which focus on a particular urban music genre
- Employ veteran urban music DJs and presenters
- Mix tracks – don't just play them
- Encourage listeners to phone in and recall past experiences from the urban music scene

## Appendix 1

# Glossary of musical terms

*Glossary of terms relating to this research - Source: Wikipedia*

### **‘Blue Beat’**

A6.1 Blue Beat was a name given to Jamaican rhythm & blues and ska music in the United Kingdom in the early and mid 1960s. The name of the music genre came from Blue Beat Records, one of the main record labels of the time. Blue Beat Records was a part of the Melodisc label, which specialised in Calypso and Mento music. Melodisc was formed in London, England in 1947, with strong ties to the West Indies. The Blue Beat label released around 425 records, and is particularly known for Prince Buster's song "Al Capone." Many Blue Beat recordings were played alongside soul music in dance clubs such as the Twisted Wheel in Manchester. The music was associated with the mod subculture.

### **‘Drum and Bass’ or ‘Jungle’**

A6.2 Drum and Bass (commonly abbreviated to DnB, drum n bass or drum & bass) is a type of electronic dance music also known as jungle. Emerging in the early 1990s, the genre is characterised by fast tempo broken beat drums (generally between 160 & 180 beats per minute) with heavy, often intricate basslines. Today, Drum and Bass is still considered an underground musical style, but its currents of influence run throughout popular music and culture.

A6.3 Drum and Bass began as an offshoot of the United Kingdom breakbeat hardcore and rave scene of the late 1980s; and over the first decade of its existence there have been many permutations in its style, incorporating elements from dancehall, electro, funk, hip hop, house, jazz, heavy metal, pop, reggae, rock, techno and trance.

### **‘House’**

A6.4 House music is a style of electronic dance music. The earliest forms of the genre originated in Chicago (United States) in the early to mid-1980s.

A6.5 The common element of house music is a prominent 4/4 beat (a prominent kick drum on every beat, also known as four-on-the-floor) generated by a drum machine or other electronic means (such as a sampler).

A6.6 House music also uses a continuous, repeating (usually also electronically generated) bassline. Typically added to this foundation are electronically generated sounds and samples of music such as jazz, blues and synth pop, as well as additional percussion.

### **‘R&B’ or ‘Urban Contemporary’**

A6.7 Contemporary R&B is a genre of American popular music, the current iteration of the genre that began in the 1940s as rhythm and blues music. Although the acronym "R&B" originates from its association with traditional rhythm and blues music, the term R&B is today most often used to define a style of African American music originating after the demise of disco in the 1980s. This newer style, often

described as contemporary R&B, combines elements of soul, funk, pop, and, from 1986 on, hip hop. The abbreviation R&B is almost always used instead of the full rhythm and blues term, although some sources refer to the style as urban contemporary (the name of the radio format that plays hip hop and contemporary R&B) or urban pop.

- A6.8 Contemporary R&B has a slick, electronic record production style, drum machine-backed rhythms, and a smooth, lush style of vocal arrangement. Uses of hip hop-inspired beats are typical, although the roughness and grit inherent in hip hop is usually reduced and smoothed out.

### **‘Reggae’**

- A6.9 Reggae is a music genre developed in Jamaica in the late 1960s. The term is sometimes used in a broad sense to refer to most types of Jamaican music, including ska, rocksteady and dub. The term is more specifically used to indicate a particular style that originated after the development of rocksteady. In this sense, reggae includes two subgenres: roots reggae (the original reggae) and dancehall reggae, which originated in the late 1970s.
- A6.10 Reggae is founded upon a rhythm style characterized by regular chops on the back beat, known as the *skank*. The beat is generally slower than that found in reggae's precursors, *ska* and rocksteady. Reggae is often associated with the Rastafari movement, which influenced many prominent reggae musicians in the 1970s and 1980s. Reggae song lyrics deal with many subjects, including faith, love, sexuality and broad social issues.

### **‘Rice and Peas radio’**

- A6.11 Rice and Peas is a popular Jamaican meal and is traditionally but not exclusively eaten at lunchtime on Sunday. As such, many London radio stations which serve the older black community feature a 'rice and peas' reggae session at this time.

**Ska: see ‘Reggae’**

**Skank: See ‘Reggae’**

**‘Urban’: see ‘R&B’**