

BBC 6 Music: Service Review

Prepared for: BBC Trust

Research assessing BBC 6 Music's delivery of the BBC's public purposes

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1 Introduction

This report summarises the findings of audience research into perceptions of how BBC 6 Music has performed against the BBC's public purposes that are within its remit.

The research was conducted in May/June 2009.

1.1 Objectives

In the context of the BBC 6 Music Service review, the aims of the research were to get feedback from listeners on how 6 Music has performed in the delivery of the BBC's purposes. Delivering a schedule that meets the purposes outlined in its Service Licence is an important part of achieving the Service Licence requirements. It was also important to understand performance ratings in the context of how important people felt the various 6 Music priorities were.

Specific objectives of the research were to:

- Gauge 6 Music listeners' views on the BBC purposes and priorities against which 6 Music is measured
- Identify what is important for 6 Music listeners
- Measure how well 6 Music currently performs
- Understand "performance gaps" (as outlined in section 1.3) in order to identify areas that 6 Music should focus on improving
- Identify whether listeners feel the station is distinctive, and if so, why
- Gauge 6 Music's performance against non-BBC commercial stations

1.2 Methodology

The research was conducted by BMRB Media. The survey was online amongst members of Lightspeed Research's online panel in the UK. This had the advantage of being a cost-effective way of reaching an audience that represents around 2% of the UK population as over nine-in-ten of 6 Music's audience use the internet.

Other important information about the research:

- **175 UK adults aged 15+ interviewed** between 22nd May 2009 and 18th June 2009. This base size allows robust analysis at the total audience level but the analysis possible within demographic sub-groups is very limited.
- Anybody who had **listened to BBC 6 Music** at all in the last 4 weeks was eligible to take part

- **6 Music listeners** were identified using a mini poll on the Lightspeed website in March 2009. Panel members were asked to select from a list which radio stations they had listened to in the past 4 weeks.
- **Detailed questionnaire** (c.20 minutes) covering demographics for profiling, media consumption, weight of 6 Music usage, opinions on 6 Music and the key section on rating 6 Music's priorities in terms of performance and importance.
- **Results weighted** by demographics to ensure they were representative of 6 Music listeners within the UK.

1.3 Explanation of performance gaps

The term 'performance gap' is used throughout this report. This is calculated as follows: respondents to the survey were asked to rate 6 Music's performance on each of the priorities within the BBC's purposes. The **performance score** is the percentage of listeners that agreed with a performance statement for a particular priority (giving a score of 5-7 out of 7 as per the scale below).

Completely disagree	1
Disagree strongly	2
Disagree slightly	3
Neither agree nor disagree	4
Agree slightly	5
Agree strongly	6
Completely agree	7

We then asked how important it was, for listeners personally, for 6 Music to fulfil each priority. The **importance score** is the percentage of listeners that felt a statement was important to some extent (giving a score of 5-7 out of 7 as per the scale below).

Extremely unimportant	1
Very unimportant	2
Quite unimportant	3
Neither important nor unimportant	4
Quite important	5
Very important	6
Vital	7

The **performance gap** is the difference between the performance and importance scores for each statement. Take "6 Music introduces me to music that is new to me" as an example. The performance score was 91% and the importance score was 85%. Subtracting the importance score from the

performance score gives a positive performance gap of +6. A negative number means that the performance score given was lower than the importance score.

2 Summary of key findings

BBC 6 Music reaches 1.3%¹ of the UK population. Although the audience is small, listeners' relationships with BBC 6 Music are positive with 62% of 6 Music² listeners approving highly of 6 Music and 82% likely to miss 6 Music if it wasn't there.

6 Music also has particularly high performance scores on the music related priorities within the Creativity purpose.

Nations, regions and communities priorities receive the lowest performance scores but the importance of 6 Music delivering this purpose is also perceived to be lower so there are no negative performance gaps.

6 Music received only one negative performance gap. This was for the statement "Documentaries on 6 Music give me a better understanding of music". While importance exceeds 6 Music's performance for this priority, importance is still relatively low (61%) in comparison to the Creativity priorities.

6 Music is felt to be distinctive as a station with 82% of listeners naming at least one 6 Music programme that would not be easily replaced by content on another station. Only 8% of listeners felt that all programmes could be easily replaced by another radio station. Listeners feel 6 Music's distinctiveness is driven by its breadth and depth of music content.

The appeal of the music content offered by 6 Music and the close relationship listeners enjoy with the station come through strongly in the research. In the audience's view, BBC 6 Music is meeting its obligations to deliver the BBC purposes within its remit.

¹ Source: RAJAR 2008/09

² This means giving a score of 8 - 10 out of 10 in response to the question "Thinking about 6 Music generally, what is your overall impression on a scale of 1 to 10, where 1 means extremely unfavourable and 10 means extremely favourable?"

3 Overall 6 Music performance measures

3.1 Three-in-five listeners are 'high approvers' of 6 Music

The group most positive about 6 Music ('high approvers' who give an overall approval score of 8 to 10 on a 10 point scale) represents 62% of all UK 6 Music listeners. Only 3% of all UK 6 Music listeners are considered low approvers (giving a score of 1 - 4 out of 10).

The BBC Trust's Purpose Remit Study tracks BBC performance as a whole among UK licence fee payers. Approval of 6 Music among its listeners is higher than that of the BBC overall. In the 2009 Purpose Remit Study, 42% of UK licence fee payers were high approvers of the BBC. The larger share of high approvers for 6 Music indicates a close relationship between the station and its listeners.

There is little variation across audience groups, with levels of high approval remaining high across all demographics, including age, sex and social grade.

3.2 Likelihood to miss 6 Music is high

The most positive support for 6 Music comes from the measure of likelihood to miss the service if it no longer existed. The percentage of UK 6 Music listeners likely to miss 6 Music is 82%. This is a greater percentage than likelihood to miss non-BBC commercial stations among their listeners (who also listen to 6 Music) with an average of 54%.

The size of the group likely to miss 6 Music is larger than the group giving high approval ratings. This suggests that 6 Music is still valued by UK listeners even if they are not entirely satisfied with current performance. Likelihood of listeners to miss 6 Music is comparable with likelihood to miss the BBC overall in the 2009 Purpose Remit Study (83%).

3.3 6 Music's music content makes it distinctive from other stations

Nine-in-ten 6 Music listeners were able to give a reason why 6 Music is distinctive from other stations. The station's choice of music dominated responses. The question was posed as an open question with the most common responses surrounding "wide range of music" (58%), "good/better (quality) music" (15%), "good DJs/presenters" (13%) and "knowledgeable DJs/presenters" (10%).

"Fantastic breakfast show with someone who is funny AND passionate about good music. Plenty of specialist shows. Best playlist on the radio. Shaun Keaveney, Adam and Joe, Stephen Merchant..... I could probably fill a page of A4 about what is great about 6 Music." Female, AB, aged 36, England

Four-fifths of listeners were able to name a programme, that they had listened to in the past 4 weeks, which could not be easily replaced by content from another station. Further to this, only 8% of listeners claimed all 6 Music shows could easily be replaced by content on another radio station.

The majority of shows named by their listeners as not easy to replace were niche shows with smaller audiences (for example Bruce Dickinson Friday Rock Show and Jon Richardson). In addition to these shows, two shows with greater audience reach (Adam & Joe and Stuart Maconie's Freak Zone) were felt to be among the shows most difficult to replace.

4 6 Music performance on the BBC's purposes and priorities

4.1 Overall ranking of performance on priorities

The priorities covered within 6 Music's Service Licence are spread across all six of the BBC's purposes. Chart 1 on page 7 displays 6 Music's **performance score** for each priority in the form of a bar. The performance score is the percentage of listeners who agree with the performance statement (giving a score of 5-7 out of 7).

The **importance score** is the percentage of listeners who feel that a statement is important to some extent (giving a score of 5-7 out of 7) but this is not shown explicitly on the chart. A full breakdown of results is provided in Appendix A.

The number to the right of the chart indicates the **performance gap**. This is the difference between the performance and importance scores for each statement. A positive number (e.g. +6) means the performance score given is higher than the importance score but a negative number (e.g. -9) means that the performance score given is lower than the importance score. Statements are ranked on performance score.

A colour code is used throughout this report to identify the six purposes and statements designed to measure the priorities within them.

Public purposes key:

CREATIVITY - Stimulating creativity and cultural excellence

NATIONS & REGIONS - Representing the UK, its nations, regions and communities

EDUCATION - Promoting education and learning

GLOBAL - Bringing the UK to the world and the world to the UK

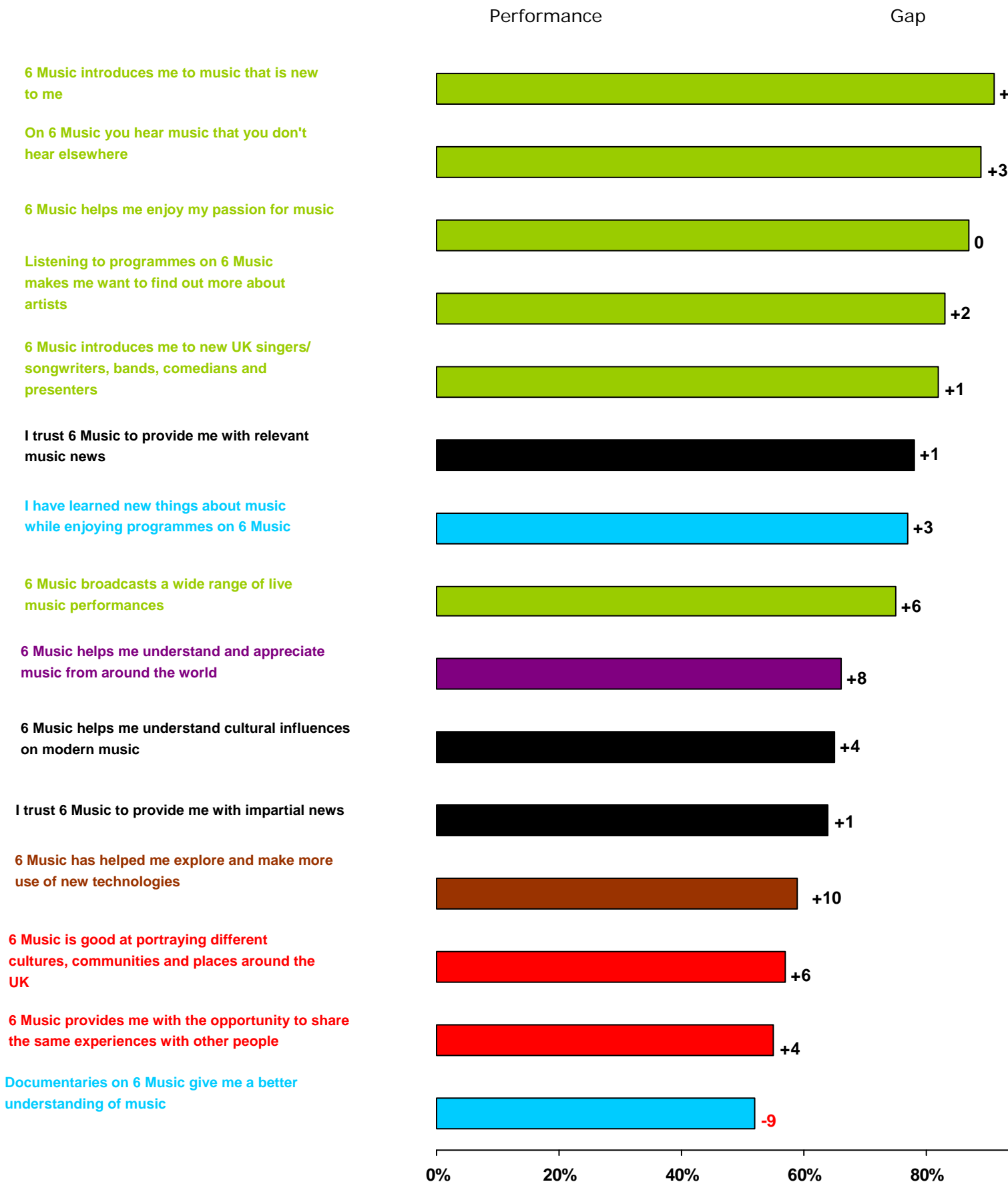
CITIZENSHIP – Sustaining citizenship and civil society

DIGITAL - Encouraging use of new communications technologies

The majority of the priority statements were taken from the BBC Trust's Purpose Remit Study with the statements being tweaked to be relevant to the station. The Service Licence for 6 Music was reviewed to ensure all of the service's aims were covered in the survey.

Where statements in the Purpose Remit Study could not be tweaked, or there was not a relevant statement, new statements were created that are specific to 6 Music.

Chart 1: Performance scores and performance gaps



Base: All UK 6 Music listeners 15+ (175)

The positive performance gaps in the chart above, combined with the overall level of performance, suggest there are no key areas for improvement. Only one priority records a negative performance gap ("Documentaries on 6 Music give me a better understanding of music" -9) but it has the fifth lowest importance score. This indicates that 6 Music is fulfilling its requirement to deliver the BBC's purposes in line with its Service Licence.

The BBC Trust Purpose Remit Study showed that overall, the BBC's performance within the Creativity purpose is relatively weak with wide negative performance gaps. However, the Creative priorities are the top performing priorities for 6 Music.

4.2 Stimulating creativity and cultural excellence

Chart 2: Performance and importance scores within the Creativity purpose



Overall, the Creativity purpose is meeting listeners' expectations, as there are no performance gaps.

The chart above plots the performance and importance scores for each priority on the same chart. The line accounts for personal importance scores and the bar for performance scores. Where the line is above the top of the performance bar there

is a negative performance gap, i.e. listeners' needs are not being met by the current service. As in this case, when the line is below or level with the bar, performance is meeting listeners' expectations.

BBC 6 Music's performance varies between priorities within the Creativity purpose but all priorities receive performance scores of 75% or more. Importance scores are also high for the Creativity priorities. Strong performance from 6 Music's music content results in all statements receiving positive performance gaps.

6 Music's strongest performance scores are for "6 Music introduces me to music that is new to me" (91%), "On 6 Music you hear music that you don't hear elsewhere" (89%), "6 Music helps me enjoy my passion for music" (87%), "Listening to shows on 6 Music makes me want to find out more about artists including buying songs/albums and going to live shows" (83%) and "6 Music introduces me to new UK singers/songwriters, bands, comedians and presenters" (82%). The statements also receive positive performance gaps indicating that 6 Music is currently achieving one of its main objectives outlined in the Service Licence:

"BBC 6 Music should deliver its remit by engaging people who are interested in music and who want to learn more about it. Its music should focus on major artists and material which do not receive much support from other radio stations. It should offer a wide selection of music with new music, live music, less familiar tracks and the work of UK artists substantially represented in its output."

Comments from listeners highlight their passion for 6 Music and its music content.

"The music is the best and most eclectic of any radio station I have ever listened to and it is unlikely I would ever listen to any other radio station for music given the choice." *Male, AB, aged 30, Scotland*

"The music content is so varied. I hate the play lists other radio stations regurgitate." *Female, C2, aged 49, England*

"I really feel 6 Music is the perfect collection of music for my taste!" *Female, AB, aged 19, England*

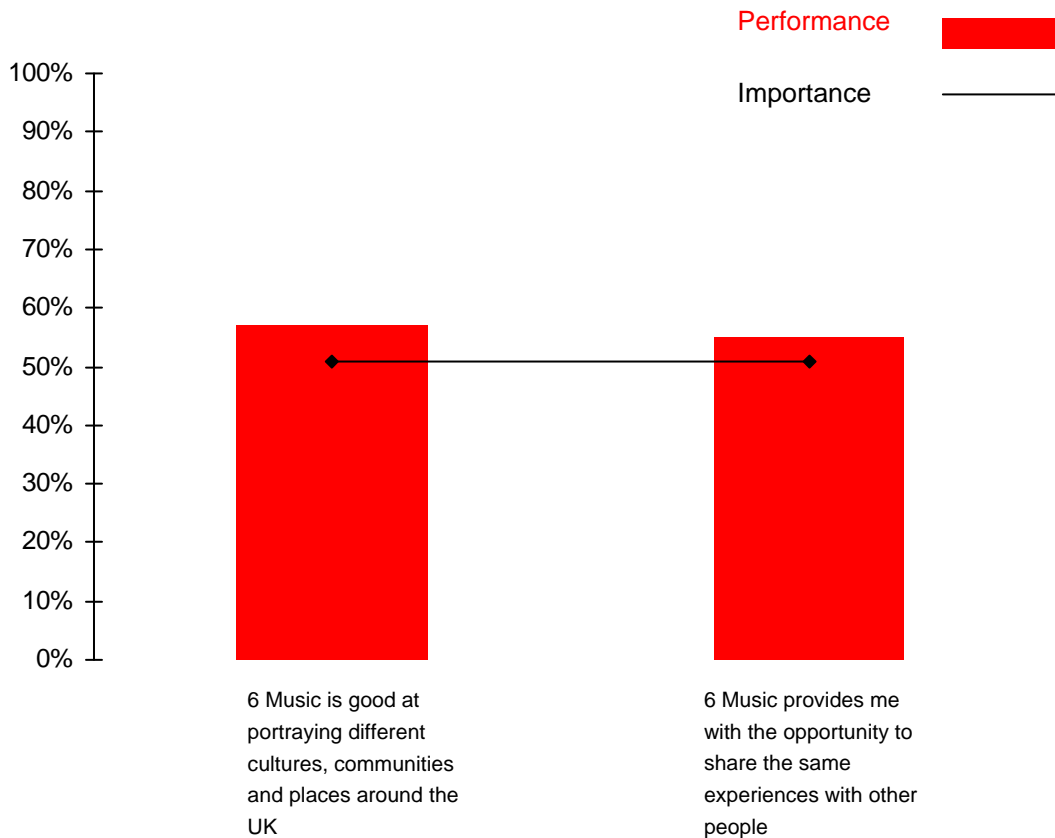
While listeners across all demographics report high performance scores for the creativity priorities younger listeners (aged 15-34) report three negative performance gaps and smaller positive performance scores compared to listeners aged over 35 years old. The negative performance gaps are for the statements "On 6 Music you hear music that you don't hear elsewhere" (-1), "6 Music helps me enjoy my passion for music" (-5) and "6 Music introduces me to new UK singers/songwriters, bands, comedians and presenters" (-1). For those aged over

35 years old these statements report some of the larger positive performance gaps (+10, +7 and +9 respectively).

"6 Music broadcasts a wide range of live music performances particularly by new artists" achieves the lowest performance score, within the Creativity purpose, of 75%. However, it seems that this is in line with lower importance to listeners as there is still a positive performance gap of +6.

4.3 Representing the UK, its nations, regions and communities

Chart 3: Performance and importance scores within the Nations, regions and communities purpose



Base: All UK 6 Music listeners 15+ (175)

The performance scores within the Nations, regions and communities purpose are among the lowest for 6 Music. While these areas are not performing as well as those in the Creativity purpose, they do not show any negative performance gaps due to the lower importance of these priorities.

In the BBC Trust's Purpose Remit Study the equivalent statements often show large negative performance gaps, particularly for representing cultures and communities of the UK. Whilst it is seen as important for the BBC overall to meet

this priority, the 6 Music audience is less concerned for this particular station to do so. Listeners' comments suggest that 6 Music's focus should be music.

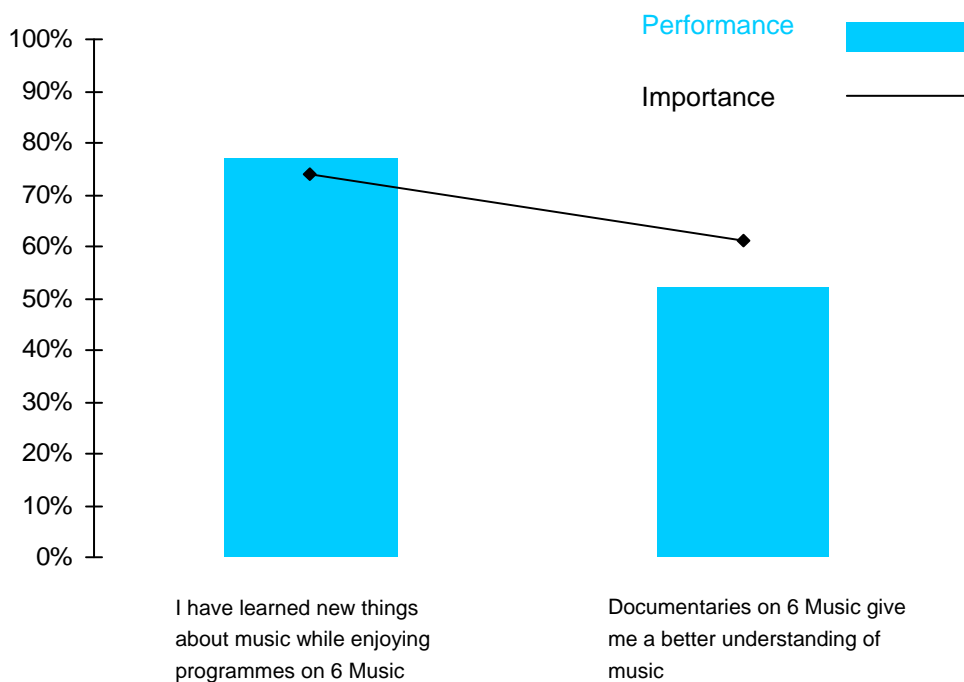
"It's fine if it sticks to music, rubbish if it strays from that." *Male, C2, aged 50, England*

"6 Music is good at portraying different cultures, communities and places around the UK" receives the highest performance score (57%) and largest positive performance gap (+6) within this purpose. "6 Music provides me with the opportunity to share the same experiences with other people (like major events, live events, and popular programmes) receives a similar performance score (55%) and also gains a positive performance gap (+4).

Younger listeners (aged 15-34) give higher performance scores for 6 Music providing opportunities to share experiences with others than listeners aged over 35 (63% and 40% respectively). However, importance scores also vary across age, with neither 15-34 year olds or listeners aged over 35 reporting negative performance gaps (+6 and 0 respectively).

4.4 Promoting education and learning

Chart 4: Performance and importance scores within the Education purpose



Base: All UK 6 Music listeners aged 15+ (175)

The BBC Trust Purpose Remit Study 2009 indicates that the BBC as a whole tends to perform well for providing content that is educational as well as entertaining. 6 Music also performs well for the priority "I have learned new things about music while enjoying shows on 6 Music", with a performance score of 77%. Importance of delivering this priority is equally important (74%), resulting in a positive performance gap of +3.

Performance is consistently high for this priority across all demographics. While there are slight differences in the size of the performance gaps they all remain positive performance gaps.

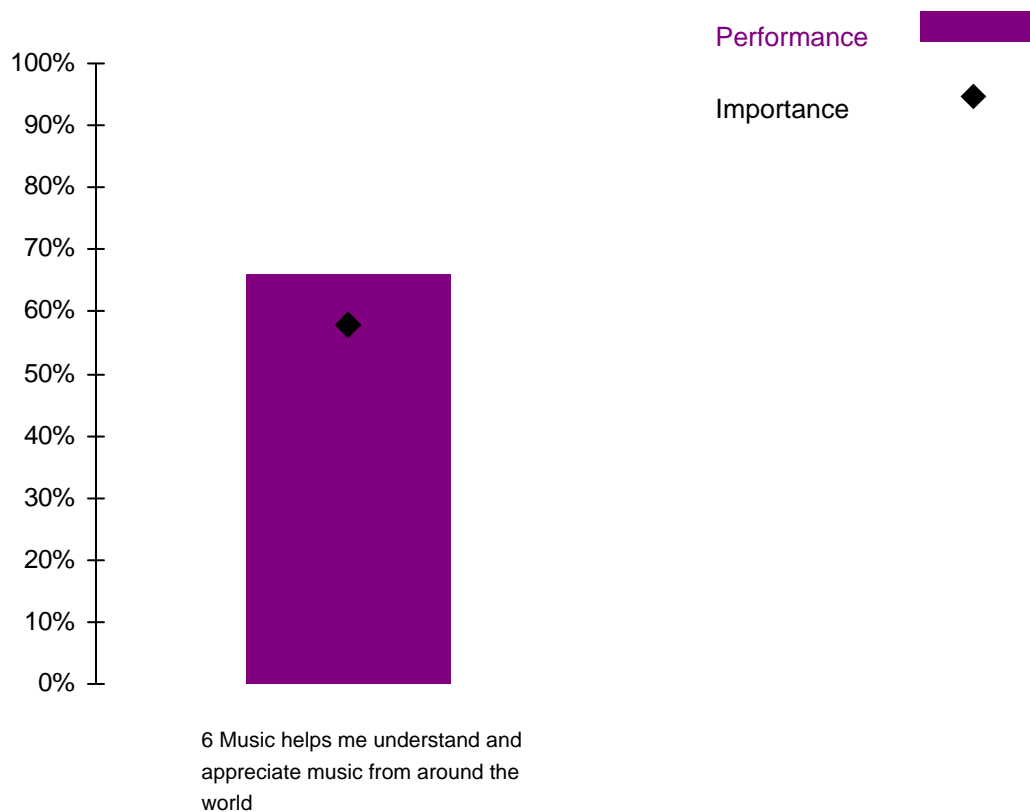
The second Education priority "Documentaries on 6 Music give me a better understanding of music" receives the lowest performance score of all the priorities (52%). While the importance score is also relatively low the priority receives a negative performance gap of -9. This priority is the most focused of all the priorities, through its mention of documentaries specifically. This may account for its weaker performance in comparison to the high performing broader music related priorities. Listeners recognise that 6 Music helps understanding of music through other shows too.

"6 Music has already made me go out and find information about an artist I'd never heard of and buy their music." Female, DE, aged 42, England

"On 6 Music I hear music I am unfamiliar with. This makes me look up the shows afterwards to interrogate play lists, which I then research online. I have a much more varied compilation of CDs at home now. Without 6 Music we would be unaware of artists' work or even their existence. 6 Music almost allows me to sample new music before buying. I hear a track I like, then buy the CD, as at least it contains one track I like, and often more. Programming is varied between comedy (George Lamb) and serious music documentaries, which makes 6 Music always enjoyable and never boring. Weekly shows i.e The Freak Zone are waited for with much eagerness. They provide something never heard before which may be my taste, wacky or thought provoking." Female, C2, aged 49, England

4.5 Bringing the UK to the world and the world to the UK

Chart 5: Performance and importance scores within the Global purpose

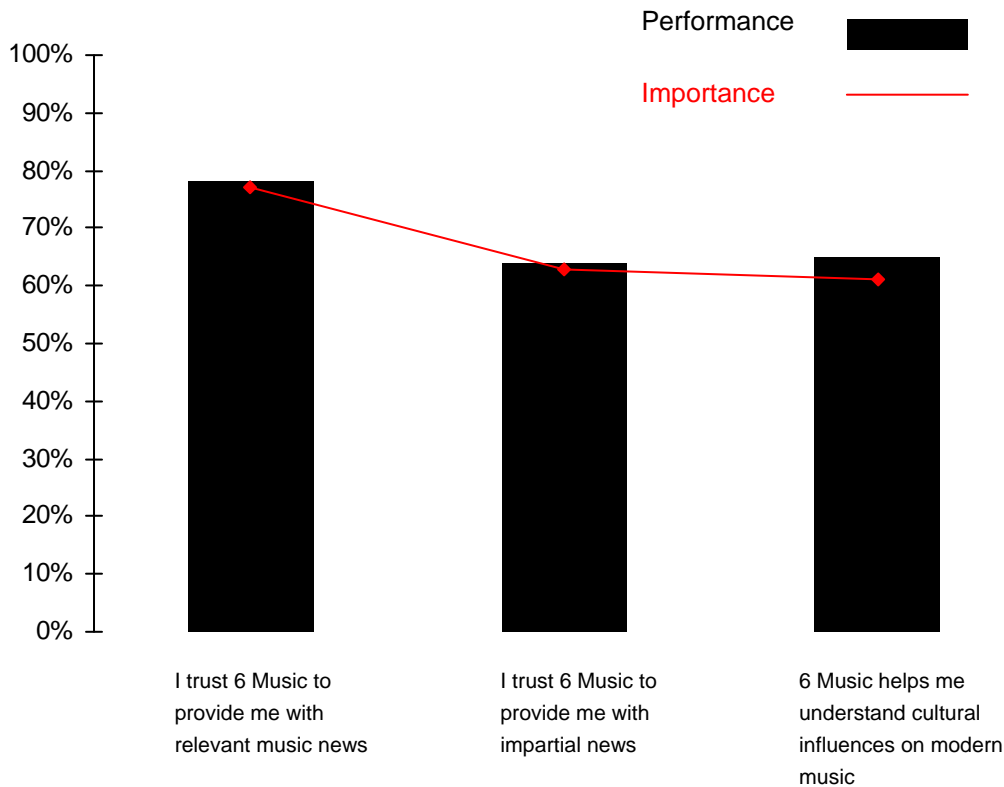


Base: All UK 6 Music listeners 15+ (175)

As with the Education purpose, the BBC usually excels in its delivery of the Global purpose. 6 Music is currently exceeding expectations within this area, despite the performance score being relatively low (66%) compared to the music focused priorities within the Creativity purpose. Once again this is due to listeners feeling it is also less important for 6 Music to deliver this priority.

4.6 Sustaining citizenship and civil society

Chart 6: Performance and importance scores within the Citizenship purpose



Base: All UK 6 Music listeners 15+ (175)

The BBC as a whole performs well for delivering news in the 2009 Purpose Remit Study. 6 Music also performs relatively well within this area. However, there are variations in performance scores within this purpose with music news performing significantly better than the other priorities.

"I trust 6 Music to provide me with relevant music news" is the best performing priority within the Citizenship purpose with a performance score of 78%. "I trust 6 Music to provide me with impartial news" also performs relatively well with a performance score of 64%. While the performance scores differ between the two statements both are meeting listeners' expectations with positive performance gaps of +1. Across all the priorities we see that 6 Music excels in its delivery of music and music related content. These strong performances are matched by listeners' desires from the station. Comments from listeners suggest that while the current news content is good, it is the music related content that really drives their choice to listen to the station.

“Great to have specific music news rather than endless sports news. Headlines are succinct and relevant.” *Female, AB, aged 36, England*

“Music news is very useful and not covered for the same types of music as well by any other station I know.” *Male, AB, aged 42, England*

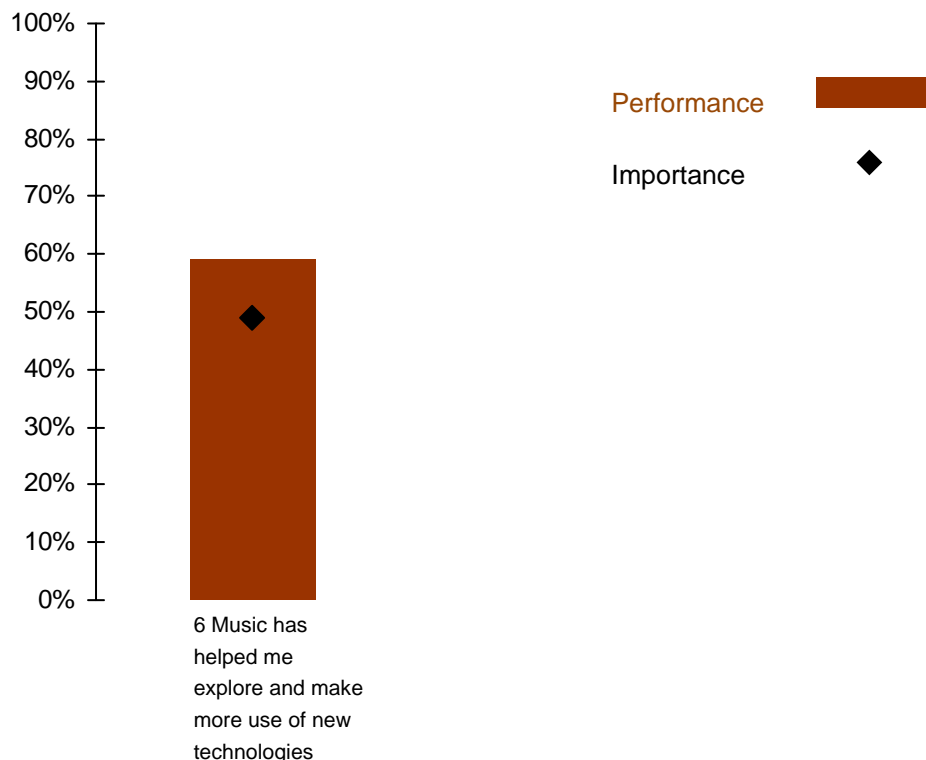
“I do not see news as an important part of 6 Music. It should be much more music based and music news, for music mad people who want to learn more about MUSIC through playing it and talking about it.” *Male, DE, aged 41, England*

Female listeners (84%) and listeners in social grades C2DE (88%) give some of the highest performance scores for 6 Music’s music news and large positive performance gaps (+10 and +15 respectively). While performance scores are still high among male listeners (75%) and listeners in social grades ABC1 (75%), there are negative performance gaps (-4 and -3 respectively).

“6 Music helps me understand cultural influences on modern music” receives a performance score of 65% which is still relatively positive. As with many of 6 Music’s lower performing priorities this also receives lower importance scores, maintaining a positive performance gap.

4.7 Encouraging use of new communications technologies

Chart 7: Performance and importance scores within the Digital purpose



Base: All UK 6 Music listeners 15+ (175)

6 Music's performance score for aiding technology use is the fourth lowest of all priorities (59%) but the performance gap is still positive. Only 18% of 6 Music listeners who use interactive TV services (67% of those with digital TV services) have ever accessed 6 Music's interactive content, suggesting either awareness and/or uptake is low. This low uptake may contribute towards the low importance and performance scores.

5 Conclusions

There is only one priority with a performance gap so 6 Music is fulfilling audience needs in terms of delivering the purposes that fall within its remit.

Overall relationships with 6 Music are positive with 62% of UK 6 Music listeners approving highly of 6 Music and 82% likely to miss 6 Music if it wasn't there. The station is perceived by listeners to be distinctive from other radio offerings with 82% stating they could not easily replace at least one 6 Music show with content from another station.

6 Music's strong music focus appears to be its biggest draw and central to the station feeling distinctive. Listeners commented on the wide range of music (58%), good/better (quality) music (15%), good DJs/presenters (13%) and knowledgeable presenters (10%). Introducing listeners to music that is new to them was also 6 Music's top performing priority. As well as listeners feeling that the station is distinctive there is a real sense of passion about the station.

"It has a really good balance between interesting music and interesting presenters. The music is nicely mixed between old and new things and most of it doesn't seem to be chart toppers! I have always had a keen interest in music and am finding new and really great bands through 6 Music, bands I would never have found in any other way. The presenters give a real sense of being actual individuals and not over-the-top DJs shouting about irrelevancies." *Female, C1, aged 30, England*

"If it were lost I would feel like I'd lost one of my senses" *Male, C2, aged 41, England*

6 Music has a very strong performance within the Creativity purpose with the station gaining high performance scores. It is clear that 6 Music listeners have a very close relationship with the station with it meeting their music needs.

Appendices

Appendix A – Full listing of personal importance, performance and performance gap scores

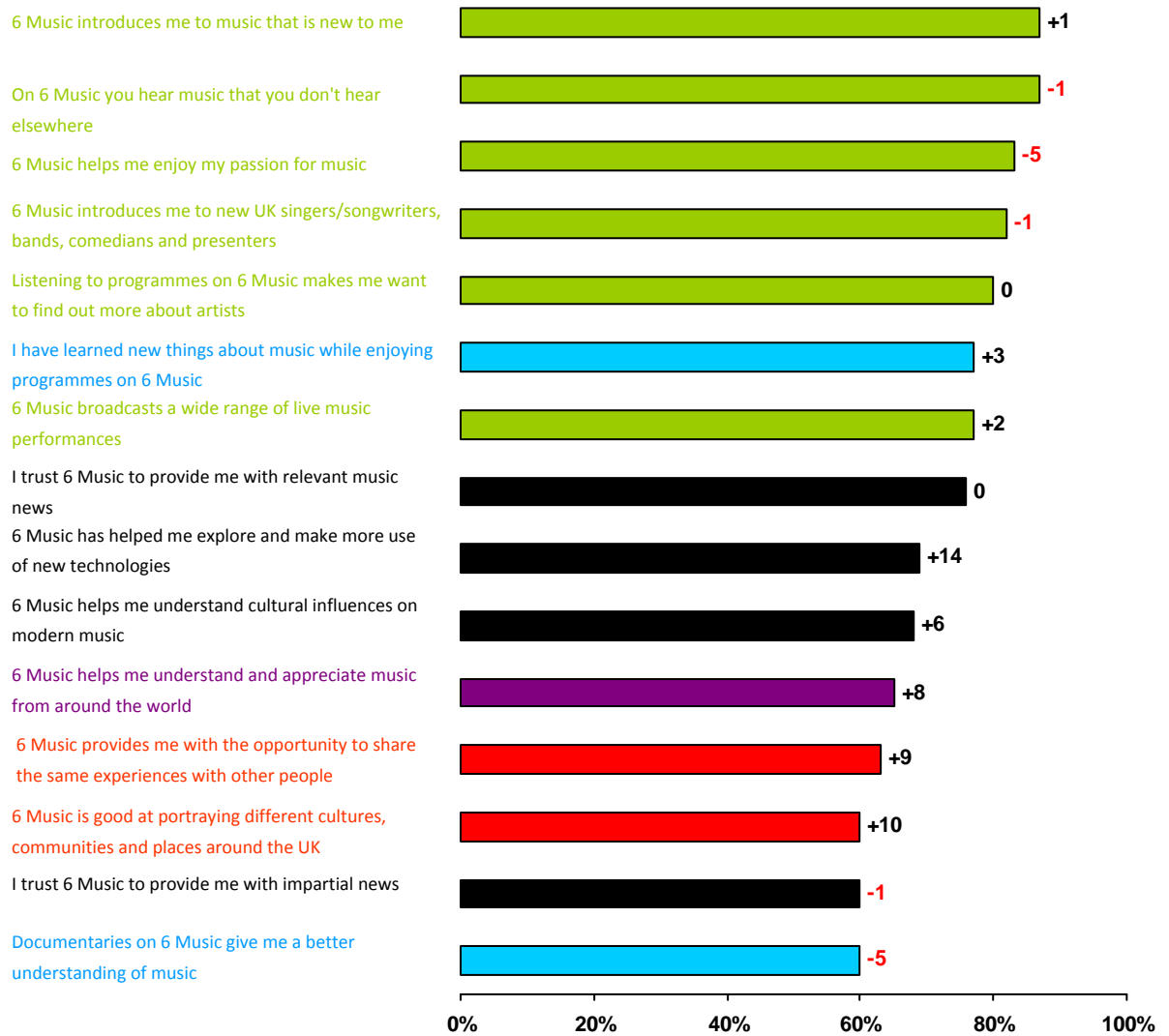
Priority	Performance	Importance	Performance Gap
Creativity			
6 Music introduces me to music that is new to me	91%	85%	+6
6 Music introduces me to new UK singers/ songwriters, bands, comedians and presenters	82%	81%	+1
6 Music broadcasts a wide range of live music performances	75%	69%	+6
Listening to programmes on 6 Music makes me want to find out more about artists including buying songs/ albums and going to live shows	83%	81%	+2
On 6 Music you hear music that you don't hear elsewhere	89%	86%	+3
6 Music helps me enjoy my passion for music	87%	87%	0
CREATIVITY AVERAGE	85%	82%	+3
Nations, Regions and Communities			
6 Music provides me with the opportunity to share the same experiences with other people (like major events, live events and popular programmes)	55%	51%	+4
6 Music is good at portraying different cultures, communities and places around the UK	57%	51%	+6
NATIONS, REGIONS AND COMMUNITIES AVERAGE	56%	51%	+5
Education			
I have learned new things about music while enjoying shows on 6 Music	77%	74%	+3

Documentaries on 6 Music give me a better understanding of music	52%	61%	-9
EDUCATION AVERAGE	65%	68%	-3
Global			
6 Music helps me understand and appreciate music from around the world	66%	58%	+8
GLOBAL AVERAGE	66	58	+8
Citizenship			
6 Music helps me understand cultural influences on modern music	65%	61%	+4
I trust 6 Music to provide me with relevant music news	78%	77%	+1
I trust 6 Music to provide me with impartial news	64%	63%	+1
CITIZENSHIP AVERAGE	69%	67%	+2
Digital			
6 Music has helped me explore and make more use of new technologies such as DAB radio, the internet, i-Player, email and interactive TV (red button)	59%	49%	+10
DIGITAL AVERAGE	59%	49%	+10
AVERAGE	72%	69%	+3

Average score calculation: The average score is calculated by adding the score for each priority and dividing by the number of priorities included. The average score is then rounded to 0 decimal places.

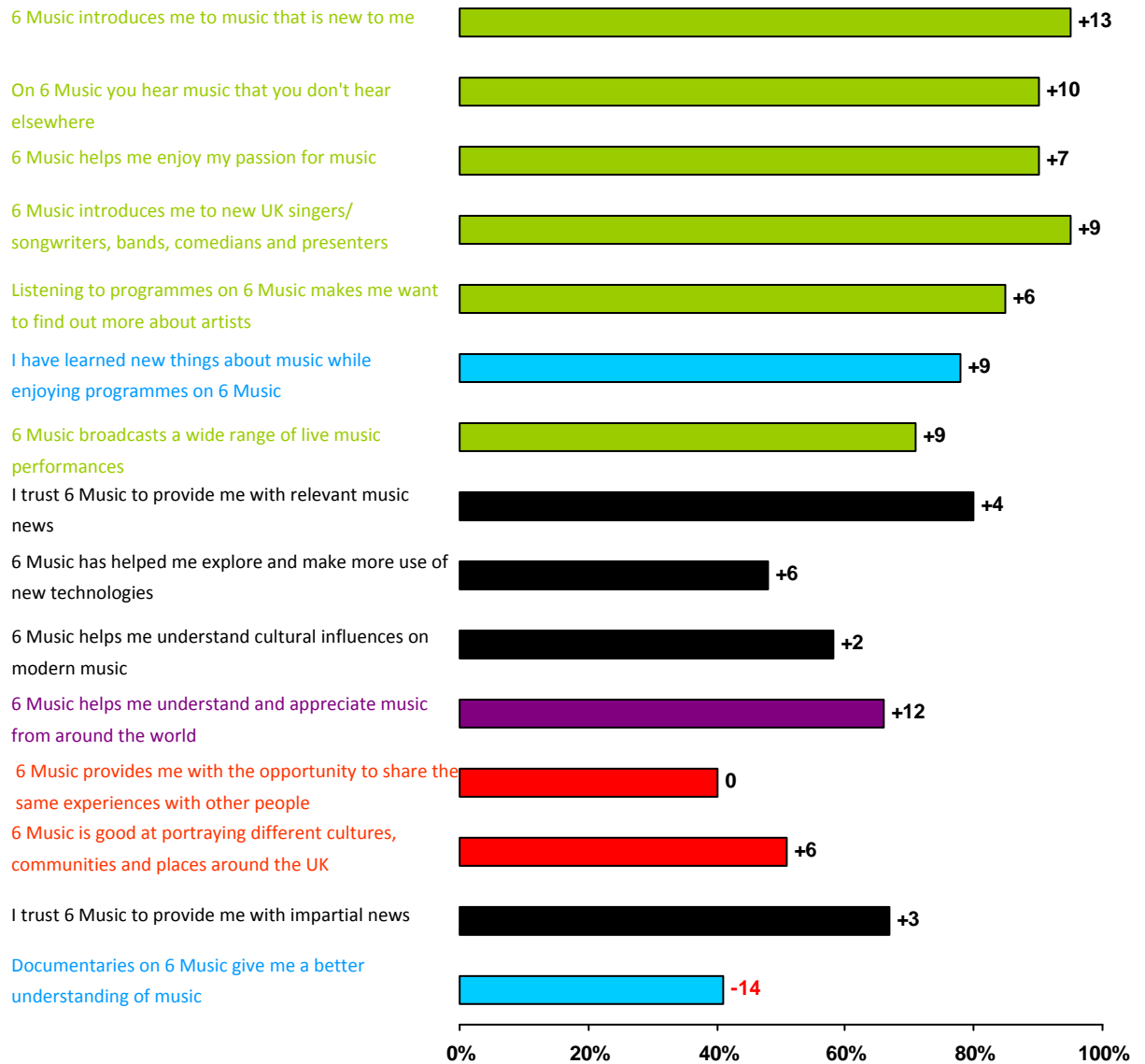
Appendix B – Performance scores and performance gaps within demographic groups

15-34



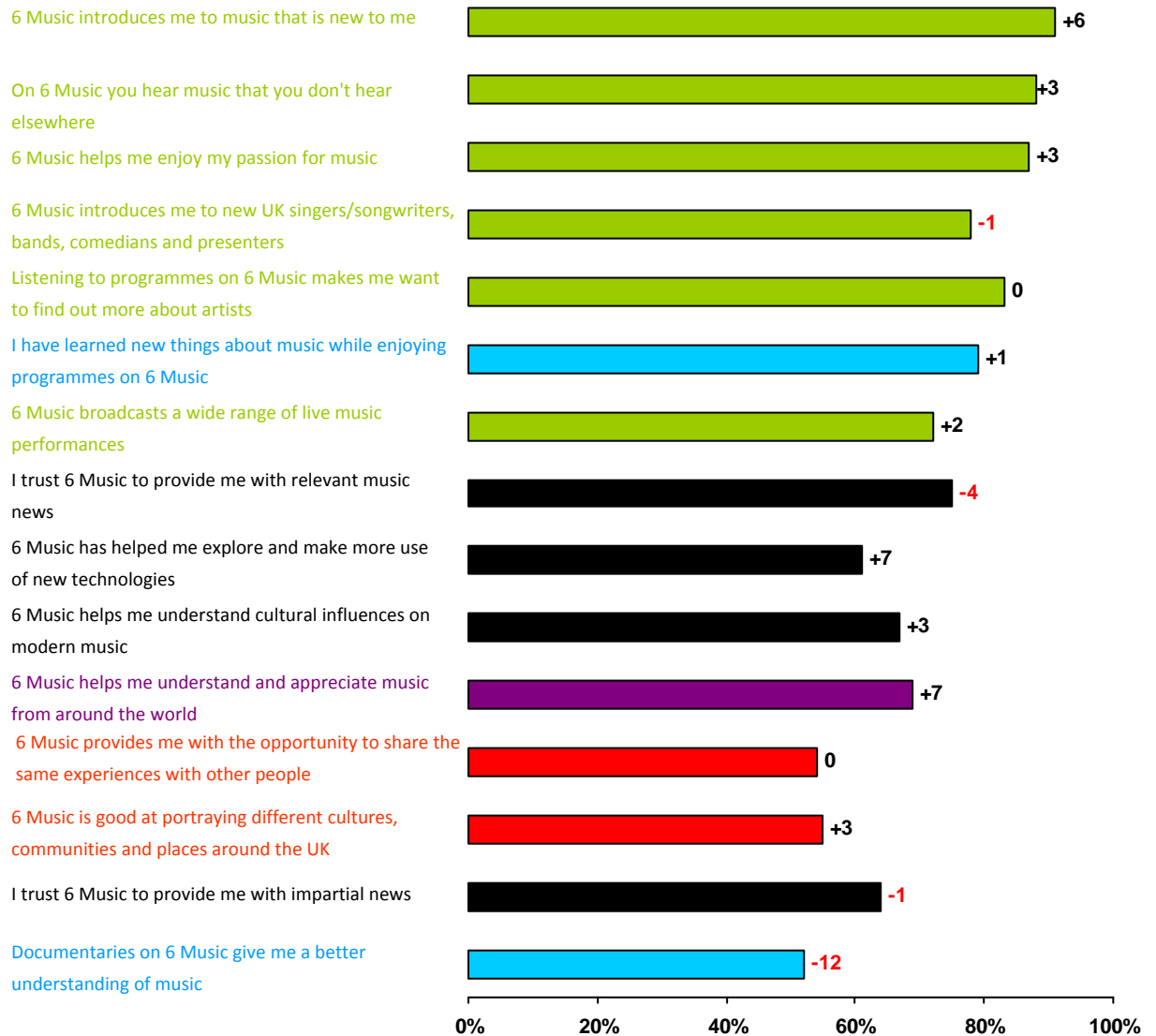
Base: All UK 6 Music listeners aged under 35+ (78)

35-54



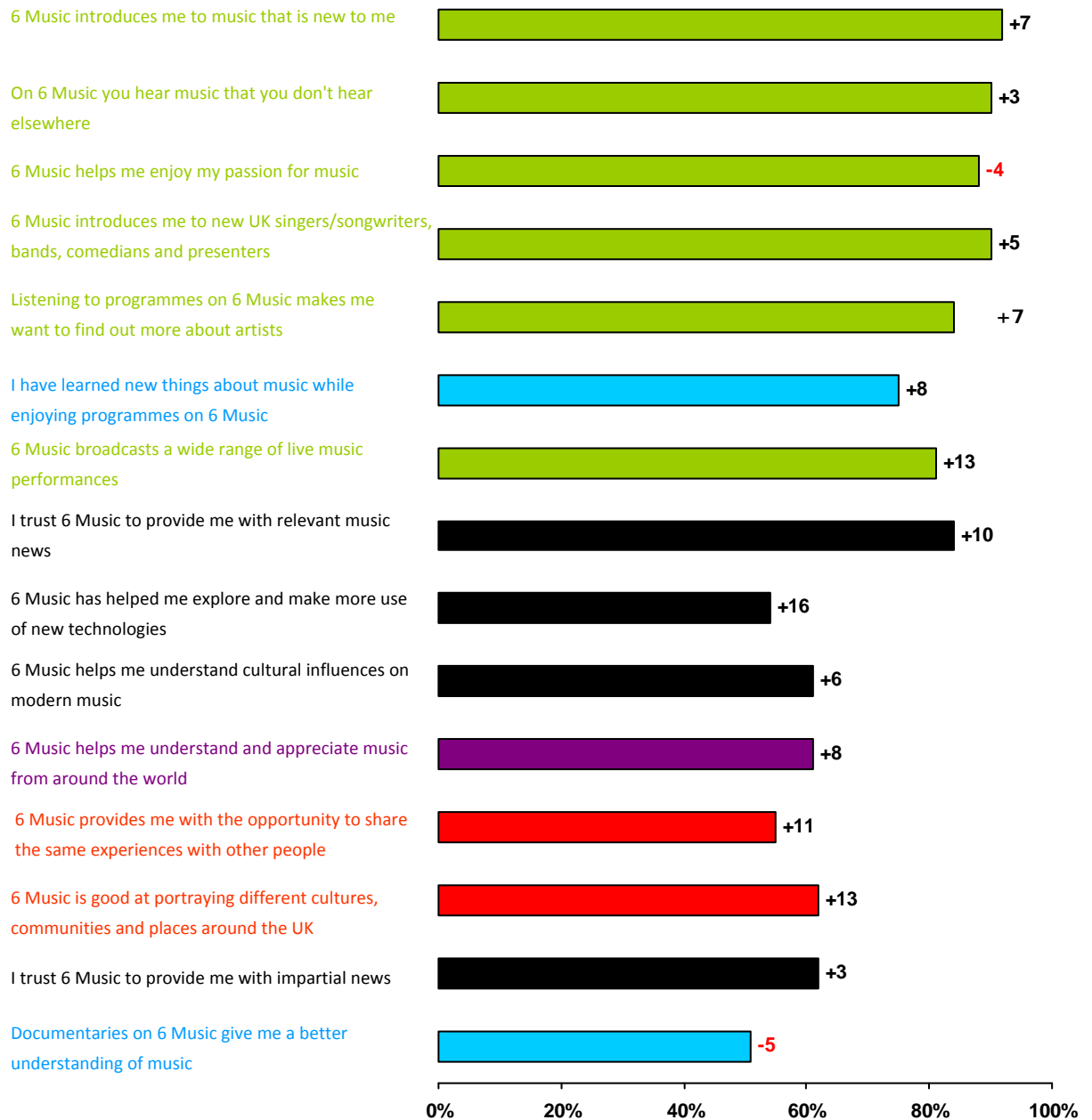
Base: All UK 6 Music listeners aged 35-54 (89)

Male



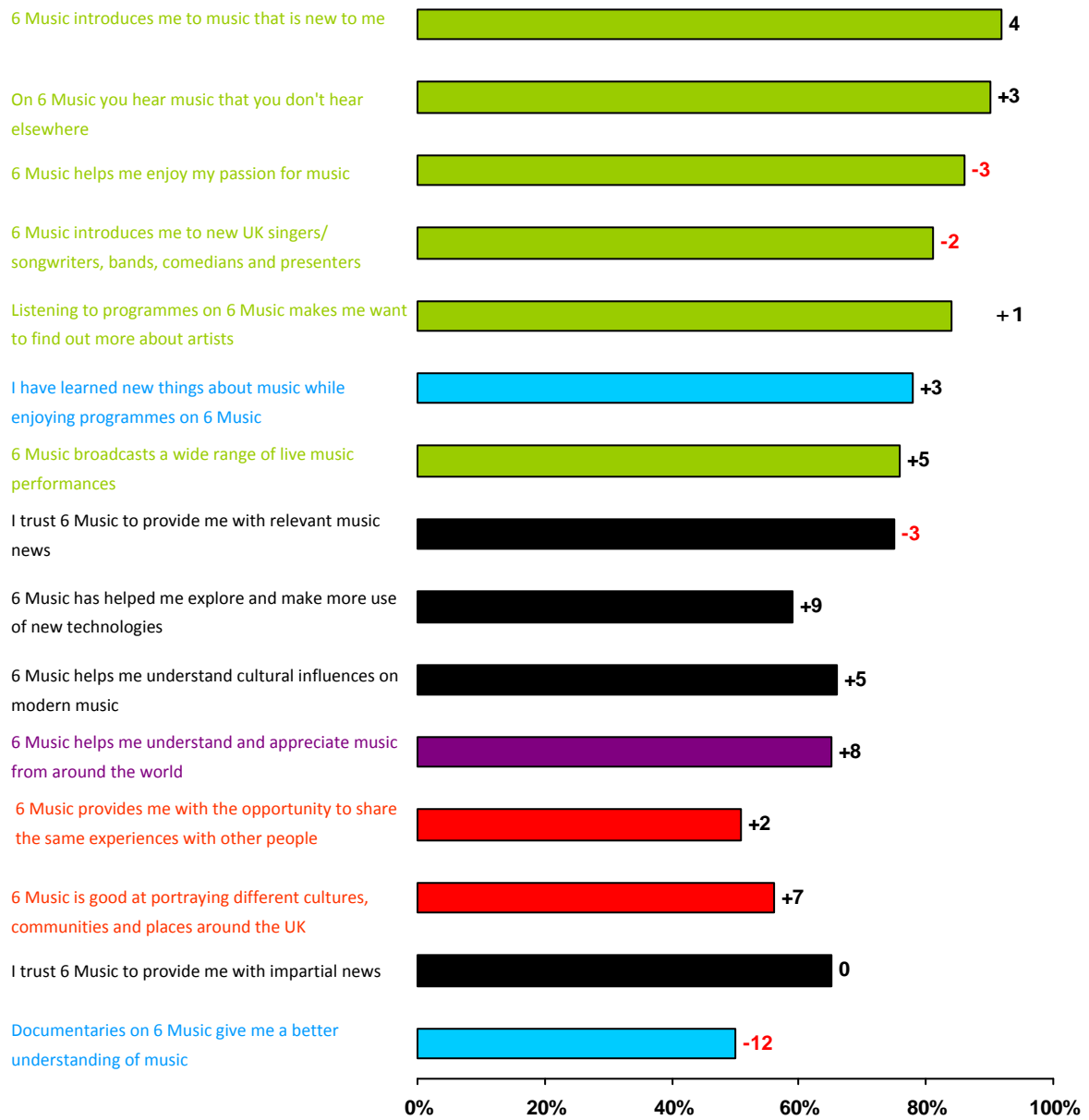
Base: All UK 6 Music listeners aged 15+ who are male (75)

Female



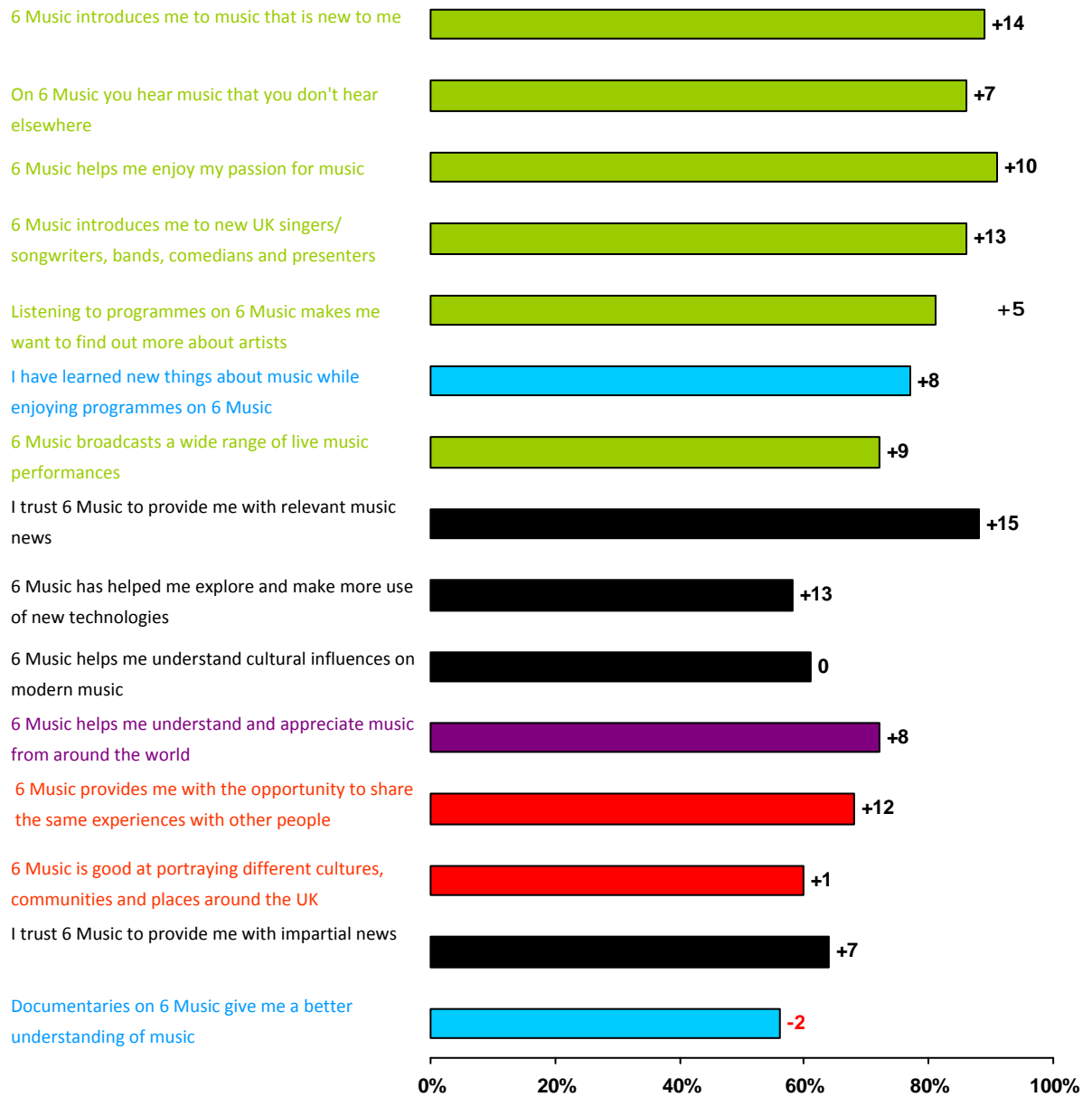
Base: All UK 6 Music listeners aged 15+ who are female (100)

ABC1



Base: All UK 6 Music listeners ABC1 aged 15+ (105)

C2DE



Base: All UK 6 Music listeners C2DE aged 15+ (70)

Appendix C – Full listing of results for 6 Music relationship questions

As mentioned in the report, there were a number of questions which explored listeners' relationship with 6 Music. The results for all of these questions are detailed here.

Overall approval

Question: Thinking about 6 Music generally, what is your overall impression on a scale of 1 to 10, where 1 means extremely unfavourable and 10 means extremely favourable?

Overall approval	
High (8-10)	62%
Medium (5-7)	31%
Low (1-4)	3%
Mean Score	7.91
Don't Know	3%

Base: All UK 6 Music listeners aged 15+ (175)

Whether would miss 6 Music

Question: I would miss 6 Music if it wasn't there.

I would miss 6 Music if it wasn't there	
Definitely agree	50%
Tend to agree	32%
Neither agree nor disagree	9%
Tend to disagree	6%
Definitely disagree	2%
NET AGREE	82%
NET DISAGREE	8%
Don't Know	1%

Base: All UK 6 Music listeners aged 15+ (175)