



COMMUNITY
BROADCASTING
ASSOCIATION OF
AUSTRALIA

A photograph of a radio studio with soundproofing foam on the walls. A woman with blonde hair is in the foreground, looking to the right, with a professional microphone in front of her. Another person is partially visible on the left, and a third person is on the right.

COMMUNITY RADIO NATIONAL LISTENER SURVEY

SUMMARY REPORT OF FINDINGS JAN 2017

Table of Contents

<i>Background</i>	4
2017 McNair Ingenuity Community Radio National Listener Survey.....	5
McNair Ingenuity Research.....	5
<i>Executive Summary</i>	6
Awareness of Community Radio.....	6
How Many People Listen to Community Radio.....	6
How Much They Listen and When.....	7
Why They Listen.....	8
Who Listens.....	9
<i>Method</i>	10
Telephone Survey.....	11
Online Survey.....	11
Survey Dates and Sample Size.....	12
Comparison with GfK/Nielsen Radio Rating Surveys.....	13

<i>Summary of Results</i>	14
Overall Awareness of Community Radio	14
Community Radio Awareness by Demographic Groups	15
Overall Radio Listening – Australia	16
Overall Radio Listening – Australia – Trend.....	17
Overall Radio Listening – National Metropolitan (8 Capital Cities)	18
Overall Radio Listening – National Non-Metropolitan	19
Overlapping Weekly Radio Audiences – Australia.....	20
Listeners to Community Radio by State	21
Exclusive Community Radio Listeners by State.....	22
Listeners to Community Radio by Metro versus Non-Metro.....	23
Listeners to Community Radio by Demographic Group	24
Listeners to Community Radio by Station Type	29
Time Spent Listening to Community Radio	31
Time of Day Spent Listening to Community Radio	33
Value of Community Radio and its Services to the Australian Community	35
Reasons for Listening to Community Radio	38
Reasons for Listening to Community Radio by Demographic Groups	39
Reasons for Listening to Community Radio by Time Spent Listening.....	41
Reasons for Listening to Community Radio by Time of Day Spent Listening	42
Listening to Community Radio by Transmission Type.....	43
<i>Trends</i>	44
Community Radio Weekly Listening Trend	44
Community Radio Weekly Listening by States Trend	45
Community Radio Weekly Listening by Areas, Gender and Age Group Trends.....	47
<i>Area Fact Sheets</i>	49

Background

Community broadcasting is Australia's largest independent media sector, a key pillar in the Australian media landscape, and recognised internationally as one of the most successful examples of grassroots media.

Over 5 million people tune in to 450+ not-for-profit, community-owned and operated radio services operating across the country each week.

These stations provide programming that caters to the needs and interest groups of their communities and contribute to and reflect an Australia that is an open society, a strong democracy and a vibrant culture.

Stations play an important role in providing a voice for communities that aren't adequately serviced by other broadcasting sectors, including:

- Indigenous Australians;
- Ethnic communities;
- Educational services;
- Religious communities;
- People with a print disability;
- Music, arts and cultural services and communities;
- Youth and seniors' communities; and
- LGBTIQ communities.

The national community radio audience listens to services that:

- Provide a diverse range of viewpoints that enrich the social and cultural fabric of Australian society and contribute to public interest outcomes;
- Promote the identities of local communities and contribute to social inclusion;
- Provide opportunities for participation in free-to-air public broadcasting and content production;
- Contribute to media diversity;
- Generate a high level of local content; and
- Provide a unique range of services and programs.

2017 McNair Ingenuity Community Radio National Listener Survey

This report summarises results from the Community Radio National Listener Survey. Initially, the surveys were conducted every second year, but since 2012 the survey has provided updated results every year, based on the results across two waves on a rolling basis – thereby providing a more regular understanding of community radio audience trends.

The table below shows the proportions of Australians aged 15 years and over listening to community radio and any form of radio every week over the survey years.

Weekly Listening	2004	2006	2008	2010	2012	2013	2014	2015	2016
All radio	83%	86%	84%	83%	86%	84%	84%	83%	83%
Community radio	24%	25%	27%	26%	25%	28%	26%	27%	28%

A key role of the Community Radio National Listener Survey is to measure the link between community radio listening and communities with particular attributes or needs. These include people with a print or other disability, people who speak a language other than English at home, people who identify as Aboriginal or Torres Strait Islander and people of different religious faiths.

The Community Radio National Listener Survey is commissioned by the Community Broadcasting Association of Australia (CBAA), with funding support from the Community Broadcasting Foundation (CBF).

**As an internationally recognised, not-for-profit cultural organisation,
the CBAA champions community broadcasting by building stations' capability
and by creating a healthy environment for the sector to thrive.**

The CBF is an independent non-profit funding agency for community broadcasting services in Australia including specialist services for ethnic, Indigenous and print handicapped audiences. The CBF has financially supported all National Listener Surveys and is committed to an ongoing research program for the sector.

McNair Ingenuity Research

McNair Ingenuity Research has been commissioned to conduct each of the National Listener Surveys to date. McNair Ingenuity Research is a fully accredited market and social research organisation and has a long and eminent history of radio audience research going back to the first radio audience studies conducted in Australia in 1934.

The research team was led by Matt Balogh, Managing Consultant and Christian Geilen, Consultant.

Executive Summary

Awareness of community radio

Overall, three quarters (72%) of Australians aged 15 years and over are aware of community radio. Since 2012, this survey has also asked survey respondents which individual community radio stations they had heard of, providing the ability to verify the stated awareness with specific station examples. This secondary measurement provides closely matching results of 70%.

72% of Australians aged 15 years + are aware of community radio

How many people listen to community radio

- Over a quarter (28%) of Australians aged 15 years and over, or 5,299,000 people, listen to community radio in a typical week.
- Overall, 83% of Australians aged 15 years and over listen to some radio in the course of a typical week.
- The number of Australians aged 15 years and over listening to community radio in an average week has risen from 3,767,000 in 2004 to 5,299,000 in 2016, with some statistically insignificant fluctuations from year-to-year.
- Of community radio listeners surveyed, 15% listen to community radio exclusively.
- Amongst the broader Australian population aged 15 years and over, 4% (or 811,000 people) are exclusive listeners to community radio in an average week.



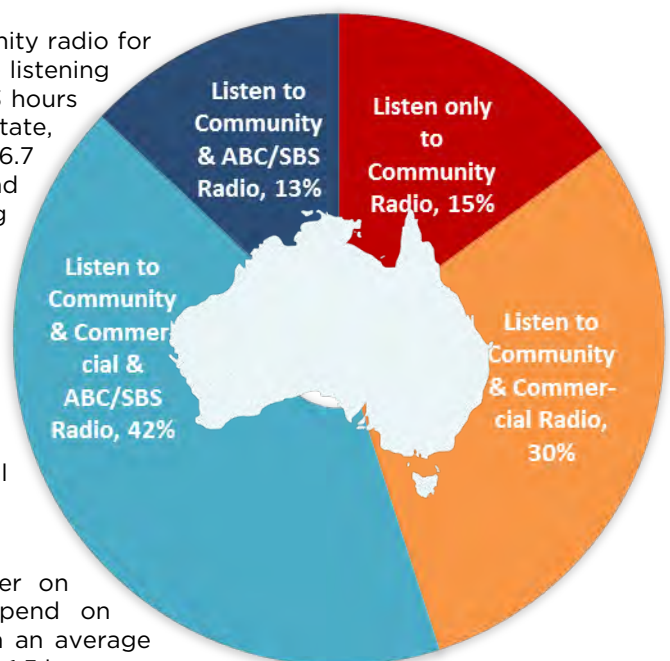
- The estimated number of people in metropolitan areas (8 cities) aged 15 years and over listening to community radio in an average week has risen from 2,367,000 in 2004 to 3,682,000 people by the end of 2016 – again with some small fluctuations from year-to-year, due to statistical variance.
- The level of community radio listening varies by state, with the Northern Territory having the highest proportion of listeners relative to the population – in fact 41% of Territorians listen to community radio in an average week. This is associated with the fact that remote Indigenous community radio stations are the only terrestrially broadcast radio services in many remote areas. By comparison, Canberra has the lowest proportion of community radio listeners relative to the population, at 16% on average a week.
- Metropolitan and non-metropolitan areas have slightly different levels of listening, at 29% and 26% respectively. Based on total audience size the metropolitan areas account for just over two-thirds of all community radio listeners.

How much they listen and when

- Listeners typically listen to 15.4 hours of community radio per week. People aged 25-39 years are the heaviest listener to community radio, averaging 18 hours per week. They are followed by people aged 15-24 years with an average of 15 hours per week, while people aged 40-54 years typically listen for 14.3 hours per week, and those aged 55 and over, 14 hours per week.

Listeners typically listen to 15.4 hours of community radio per week.

- People who regularly tune in to community radio have a portfolio of radio listening, with 42% listening to a mix of community radio, commercial radio and ABC/SBS Radio, 30% listening to both community radio and commercial radio but not ABC/SBS radio, 13% listening to both community radio and ABC/SBS radio but not commercial radio and 15% listening to community radio exclusively.
- Listeners in metropolitan areas are likely to listen to community radio for longer than their regional counterparts, with the time spent listening in metropolitan areas averaging 16.4 hours compared to 13.3 hours per week for non-metropolitan areas. Comparing state-by-state, Western Australia has highest level of listening time at 16.7 hours per week. New South Wales, South Australia and Victoria also have high levels of listening per week, averaging 16.19 hours, 15.15 hours and 14.9 hours per week respectively. Queensland, Tasmania, the Northern Territory and the ACT have the least listening time averaging 14.7, 13.55, 12.9 and 12.4 hours per week respectively. Note that the low time spent listening in the Northern Territory, in the context that the NT has the highest overall listening levels, may be due to the programming format used by many Remote Indigenous Media Organisations, which allocate a period (typically around 2 hours) to local content from each local community in their broadcast zone.
- As with all radio, listening to community radio is greater on weekdays than weekends. Community radio listeners spend on average 2.5 hours per day listening to community radio on an average weekday, compared to 1.7 hours on an average Saturday, and 1.5 hours on a typical Sunday.

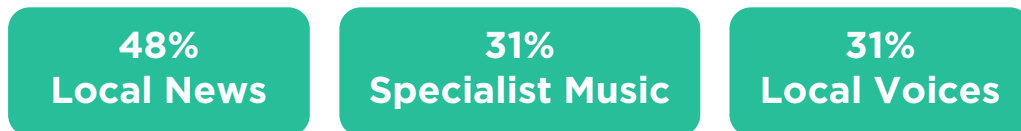


Breakfast and mid-morning is when people listen most often

- Community radio shares most daytime listening patterns with commercial and public radio, with peak listening during breakfast (5am-9am) and mid-morning (9am-noon) (when 60% of listeners tune in), followed by drive time (3pm-7pm) with 57% of the weekly audience listening in the early evening. Just over half of the audience (53%) listen during the afternoon session (noon-3pm) and one third (34%) during the later evening (7pm-midnight), with 34%. Approximately one in five (18%) listen during overnight broadcasts (midnight-5am).
- Women are more likely to listen to community radio during mid-morning whereas men are more likely to listen during the breakfast and drive. People aged 15-24 years are more likely to listen during drive time, while people aged 25-39 years and 40-54 years are more likely to listen during breakfast and people aged 55 years and over are more likely to listen in the mid-morning. People who live in metropolitan areas are more likely to listen to community radio during breakfast and drive, while people living in regional areas of Australia are more likely to listen during the mid-morning.

Why they listen

- The key reason that survey respondents gave for listening to community radio was that stations have “*local information/local news*” (48%). This explanation prevails irrespective of the listeners’ age, location, how long they listen for or what time of day they listen. The second and third most common reasons given for listening to community radio were that they have “*specialist music programs*” (31%) and “*local voices/local personalities*” (31%).



- Listeners aged 15-24 years emphasised that “*they play Australian music/support local artists*” on community radio (34%).
- For non-metropolitan listeners, “*local information/local news*” is consistently the most cited reason (61%), followed by other statements with a “*local*” emphasis. Amongst metropolitan listeners, some additional frequently mentioned reasons for listening to community radio were that they have “*local information/local news*” (42%), “*specialist music programs*” (33%) and “*local voices/local personalities*” (28%).
- Whilst “*local information/local news*” and “*specialist music programs*” were often key reasons for listening to community radio, these two attributes were more likely to be cited amongst those respondents who spent the most time listening to community radio.
- Reasons for listening to community radio amongst evening listeners were particularly likely to include mention of “*programs not available elsewhere/I hear something that I don’t hear anywhere else*”, “*local voices/local personalities*” and “*diversity in programming*”.
- Reasons for listening to community radio that most correlated with breakfast and mid-morning listening featured “*local information/local news*” and “*local voices/local personalities*”. In the afternoon and evening, music plays a key motivational role in choosing to listen to community radio, with responses such as “*specialist music programs*” and “*play Australian music/support local artists*” commonly given as a reason for listening.
- The majority of community radio listeners find community radio and its services to the Australian community valuable (94%), with 43% finding it very valuable and 51% quite valuable. Overall women and people who live in regional areas are more likely to rate it very valuable.

94% of listeners find community radio and its services to the Australian community valuable

Who Listens

- Community radio draws its audience from a wide cross section of the community with a reach of at least 20% of most demographic groups tuning in to community radio during a typical week.
- Over a quarter (28%) of part-time employed people and 32% of people whose annual gross income is over \$100,000 listen to community radio during a typical week.
- Over one third (35%) of people who regularly speak a language other than English in their household listen to community radio during a typical week.
- Half (48%) of people who identify as Aboriginal or Torres Strait Islander listen to community radio during a typical week.
- One third (34%) of people who have a reading disability listen to community radio during a typical week.
- Community radio has a small bias to male listeners, with 55% of the audience comprising men and 45% comprising women.
- One in five (19%) are aged 15-24 years, 30% aged 25-39 years, 23% aged 40-54 years and 28% are aged 55 years or over.
- Four in ten (39%) are engaged in full-time work and 19% in part-time work. Further demographic profiles by state, city and non-metropolitan areas can be found in the Area Fact Sheets on the CBAA website.

Method

This research was conducted by means of an interlaced survey of both online and telephone interviews amongst 14,294 people aged 15 and over throughout Australia. The 2004, 2006, 2008 and 2010 waves of research were conducted entirely by means of telephone surveys. Total sample across Australia (2 waves): 14,294 (1,043 Telephone/13,251 Online). The research method was altered in 2012 in order to address the declining penetration and usage of landlines and to therefore incorporate mobile phone only using households. Hence, since 2012, the research was conducted using the *interlaced method*, combining a computer-based telephone interviewing technique with an online survey. This method was selected in the context of declining penetration of land-line telephones, for example:

- A decreasing proportion of households have a landline telephone (68%) overall; and
- Most people aged 25-34 years cannot be reached via a landline – 59% live in households without landlines;¹

By comparison, 91% of Australians have access to the Internet². The need to include a sampling method other than landline telephones is even more acute due to the reluctance of younger people to treat seriously calls that come via a landline, because they expect that anyone of significance in their life would only call them on their mobile phone.

Conversely, some older members of the community do not use the Internet, so an online survey on its own would not suffice. Hence, the interlaced method was adopted – providing for a fully integrated dual method survey. The term ‘interlaced’ reflects the dynamics of the design: the method does not comprise two independent surveys with disparate quota targets – rather, as the survey progressed, quotas of age and gender by location were modified to maximise the response rate in both methods. For example, while the original sample design did not require any respondents aged 15-29 years to be achieved from the telephone survey, some interviews were achieved by telephone within this age bracket, so that the requirement of the online survey to include people of this age bracket was reduced. Conversely, the online survey performed better than expected in reaching older respondents, so some quota requirements were shifted from the telephone survey to the online survey amongst people aged 55 years and over.

¹ Australian Communications and Media Authority, ACMA Communications report 2015-16 www.acma.gov.au/commsreport.

² Australian Communications and Media Authority, ACMA Communications report 2015-16 www.acma.gov.au/commsreport.

Telephone Survey

The telephone component of this survey was conducted by trained interviewers from McNair Ingenuity Research's supervised call centre in Crows Nest, Sydney. The interviewing team comprised trained interviewers accredited under the international standard AS ISO 20252, which incorporates the Interviewer Quality Control Australia scheme that preceded it. Interviewing was supervised at all times and quality control checks included monitoring of 5% of the interviews.

The interviewing was conducted by means of a Computer Assisted Telephone Interviewing (CATI) system. A sample of telephone numbers was drawn randomly from the latest electronic version of the white pages phone books for all areas of Australia. The random sample was then programmed into the CATI system, and a rigorous call-back procedure implemented to help ensure that all households contacted, including those where people are not often at home.

The CATI system ensured that interviewers followed a meticulous script, ensuring that each interview was conducted in the same way. It also included scripts with regard to any respondent queries about confidentiality and privacy. A freecall number 1800 669 133 was offered to respondents who wished to check the veracity of the interview. Calls on this number were taken by a senior supervisor or executive. As members of the Australian Market & Social Research Society, McNair Ingenuity Research also offered the AMSRS Survey Line number 1800 364 830 as an external verification source as to the company's credibility. The McNair Ingenuity Research website was also offered for information about the company's privacy policy.

Online Survey

The online survey was conducted amongst members of various online consumer research panels. The market research panels used for this study are all accredited under international ISO standards 20252 and 26362. Panellists were invited by means of an initial invitation email with a link to the online version of the survey. Reminder emails were sent to those that had not responded after a few days. This procedure was repeated until target quota requirements were met.

Survey Dates and Sample Size

The interviewing program in the 5 capital cities was conducted in May and October 2016 and the regional areas were conducted in May/June 2015 and May/June 2016, mainly on weekday evenings and weekends. Interviewing was conducted among people aged 15 years and over, and quotas were used to ensure an equal number of men and women in each area, and a representative spread of age groups. A total of 14,294 interviews were conducted as follows:

Sydney	NSW	2,303
Regional NSW	NSW	388
Melbourne	VIC	2,139
Regional VIC	VIC	338
Brisbane	QLD	2,016
Gold Coast	QLD	410
Regional QLD ex Gold Coast	QLD	336
Adelaide	SA	2,025
Regional SA	SA	361

Perth	WA	2,260
Regional WA	WA	369
Darwin	NT	300
Regional NT	NT	251
Hobart	TAS	301
Regional TAS	TAS	246
ACT / Canberra	ACT	251
Total		14,294

The results were “weighted” (to potential ‘000s) by age groups within gender within each of the above areas to reflect the known populations in each area, based on the most recent population information provided by the Australian Bureau of Statistics.

The questionnaire was identical for all the above areas except for the list of community, commercial, ABS/SBS radio stations, which differed for each area. Every community radio station in Australia (excluding some RIBS stations) was listed in one or more areas.

Most of the questions were purposely the same as those asked in previous surveys so that comparisons of results could be made.

Results

Overall Awareness of Community Radio

72% of Australians aged 15 years and over reported that they are 'aware' of community radio. This is slightly higher than in 2010, when 70% said they were 'aware' of community radio and slightly lower than 2012 were 73% said they were 'aware' of community radio. People who listen to radio in an average week are more likely to be aware of community radio than the general population. Not surprisingly, listeners to community radio in an average week are the most likely group of people to be aware of community radio, although there are some community radio listeners who claimed no awareness of community radio. As the awareness question was the first question in the survey, some respondents may not have been aware that the stations they listen to are actually community radio stations.

Since 2012, survey respondents were also asked if they had heard of individual community radio stations, which allows us to calculate the proportion who have heard of at least one station. Compared with the stated awareness level, this proportion is a little lower – 70%, compared to 2012 which was 75%. Both figures “awareness” (general) and “heard of” (specific stations) suggest that most Australians know about community radio.

Fig 1a. Community Radio Awareness – Australia

Percentages are of the total population

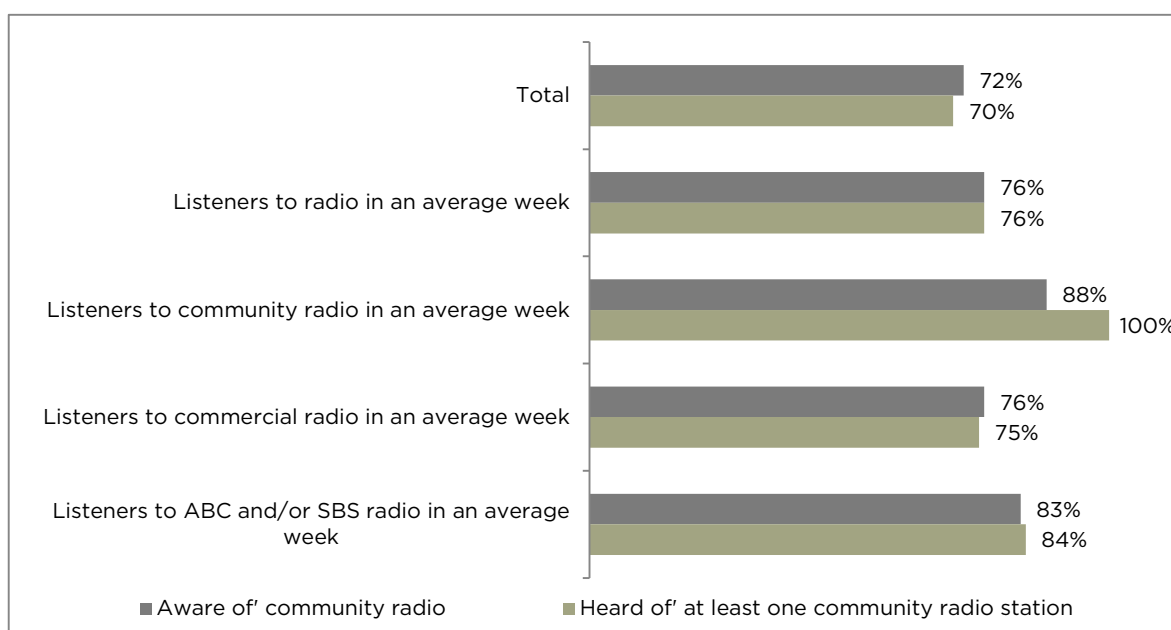


Fig 1b. Community Radio Awareness – Australia – Trend

Percentages are of the total population; na = not asked

Australian Population 15+	2008	2010	2012	2013	2014	2015	2016
'Aware' of community radio	71%	70%	73%	74%	72%	72%	72%
'Heard of' at least one community radio station	na	na	75%	69%	69%	69%	70%

Community Radio Awareness by Demographic Groups

Awareness of community radio varies considerably by demographic groups, from a high of 80% of people aged 55 years and over, to a low of 63% amongst people aged 15-24 years. Similarly, the percentage of people who have 'heard' of at least one community radio station varies by demographic group, as shown below.

Fig 2. 'Aware' of Community Radio

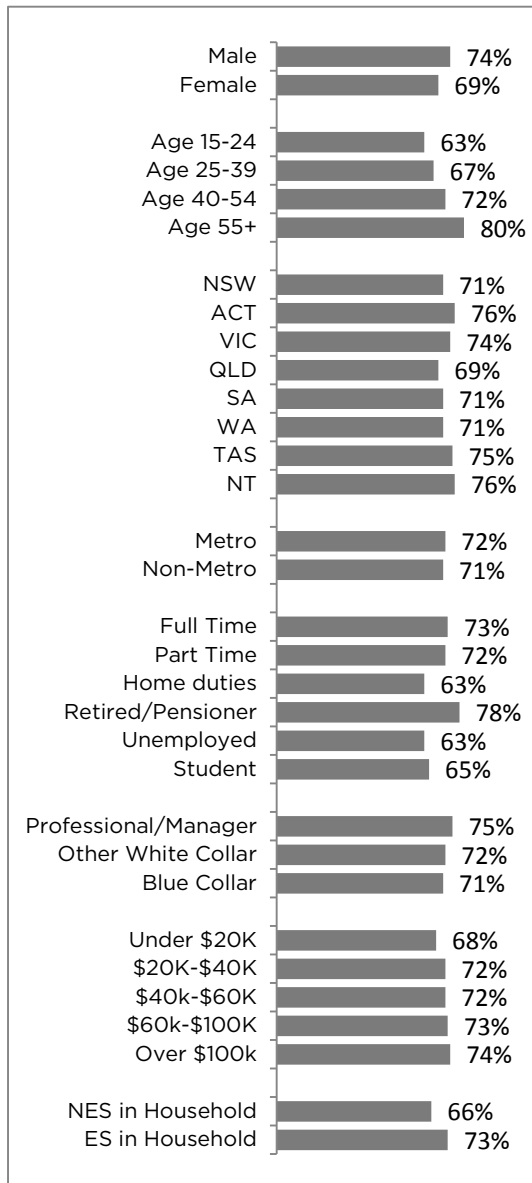
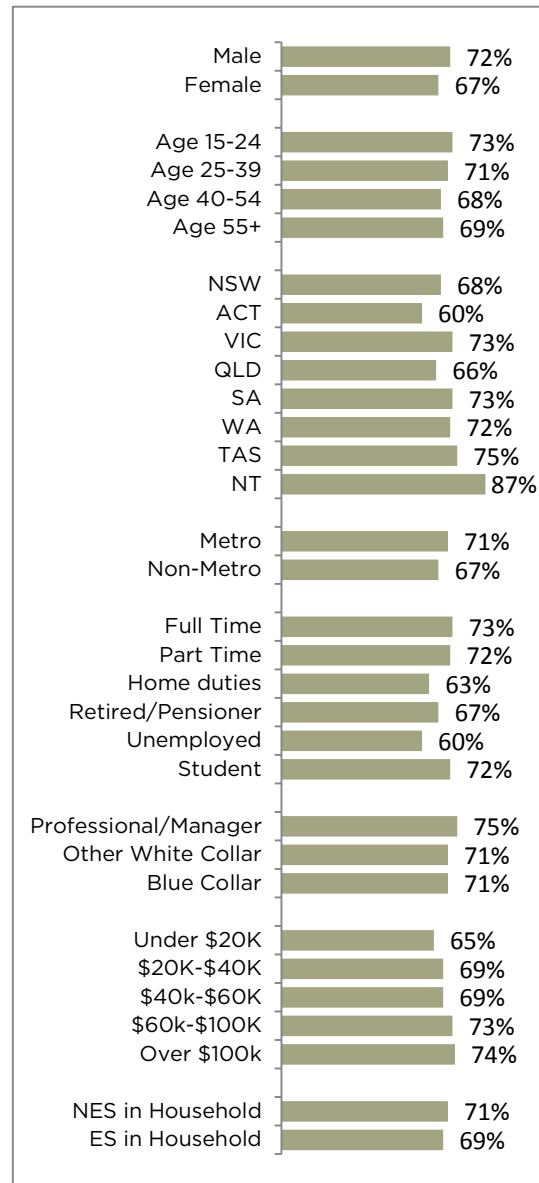


Fig 3. 'Heard of' Community Radio



Percentages are of the total population

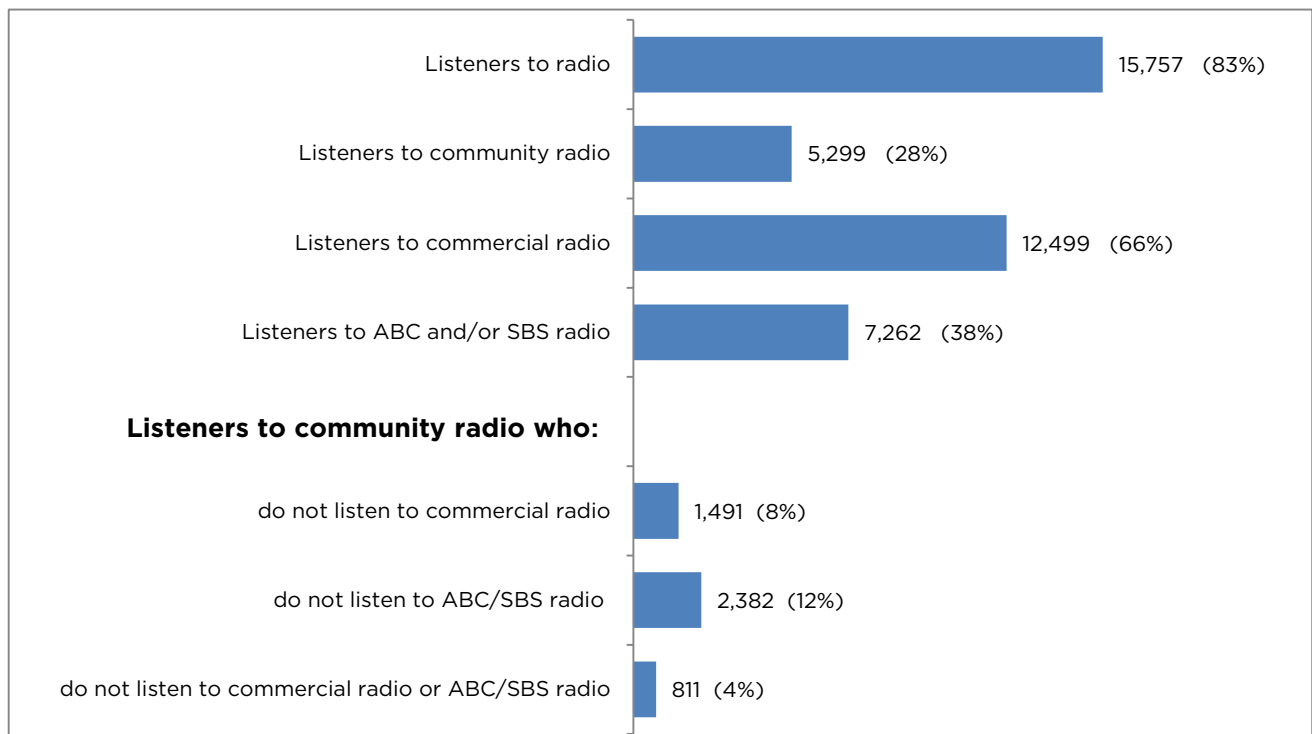
NES = non-English speaking ES = English speaking

Overall Radio Listening – Australia

- 15,757,000 people aged 15 years and over, or 83% of Australia's population of 19,065,000 people aged 15 years and over, listen to radio in an average week - a slight decrease compared to population growth. Amongst these, 5,299,000 people aged 15 years and over (28%) listen to community radio in an average week. 66% listen to commercial radio and 38% listen to ABC and/or SBS radio in an average week.

Fig 4. Overall Radio Listening in an Average Week - Australia ('000)

Percentages are of the total population



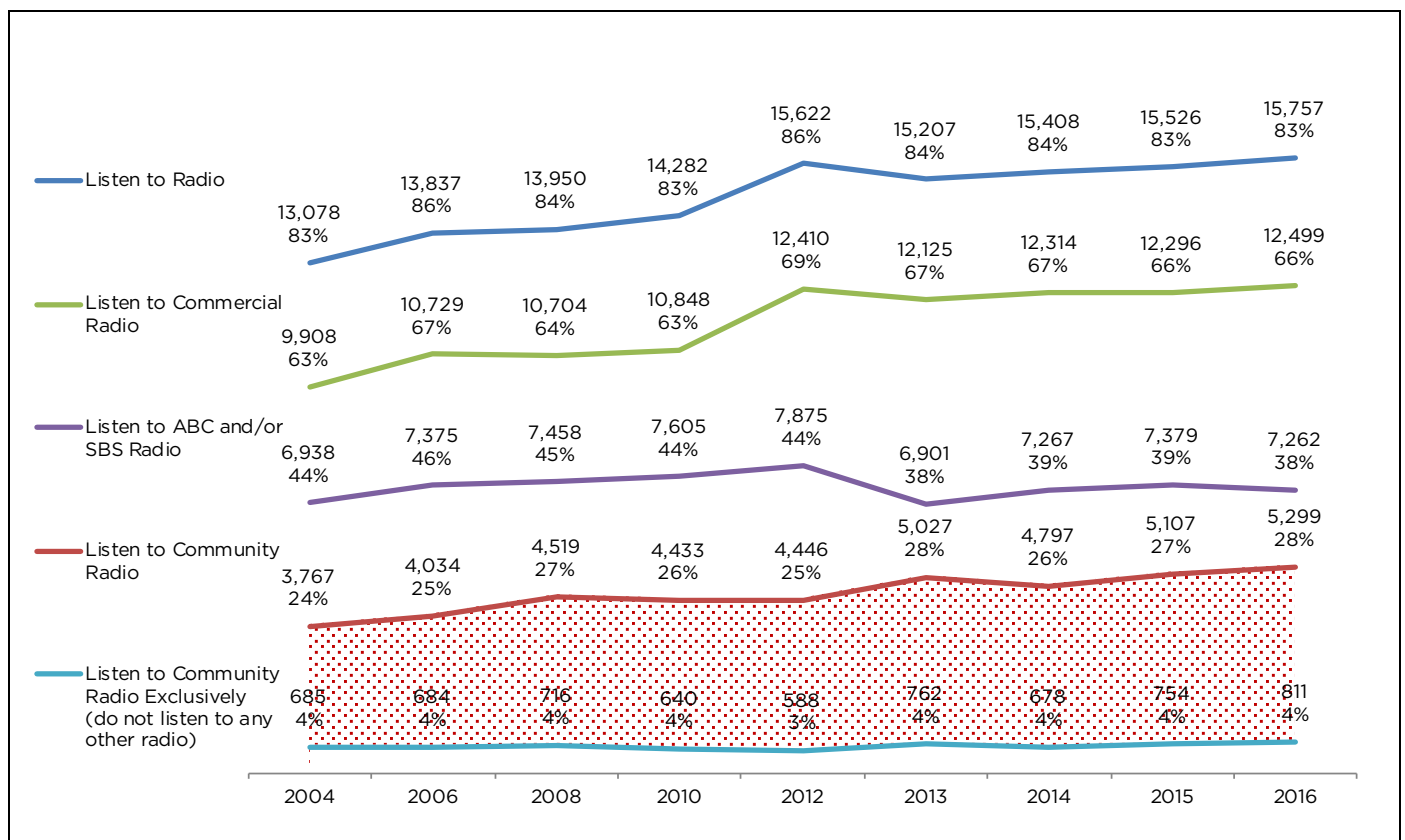
- In an average week, of all people aged 15 years and over throughout Australia (19,065,000 people):
 - 1,491,000 people, or 8%, listen to community radio but not commercial radio;
 - 2,382,000 people, or 12%, listen to community radio but not ABC/SBS radio; and
 - 811,000 people, or 4%, listen to community radio exclusively, that is, listen to community radio but not commercial radio or ABC/SBS radio.
- Corresponding figures to the above for all main geographical areas of Australia are shown in the [Fact Sheets](#) later in this report.

Overall Radio Listening - Australia - Trend Overtime

The graph below shows the overall radio listening trend, as well as the trend for Community, Commercial, ABS/SBS and exclusive Community radio listeners an average week.

The figures show that overall radio listening in term of raw population numbers has increased from 13,078,00 people aged 15 years and over in 2004 to 15,757,000 people aged 15 years and over in 2016 - this is an increase of just over 2.5 million people in 12 years. Taking into account population growth, the share of listening to radio in the past week of the population aged 15 years and over has stayed the same. Commercial and community radio show significant percentage increases in listenership since 2010, while ABC/SBS show a significant decrease in terms of percentage reach amongst the population aged 15 years and over.

Fig 5. Overall Radio Listening in an Average Week - Australia ('000) - Trend



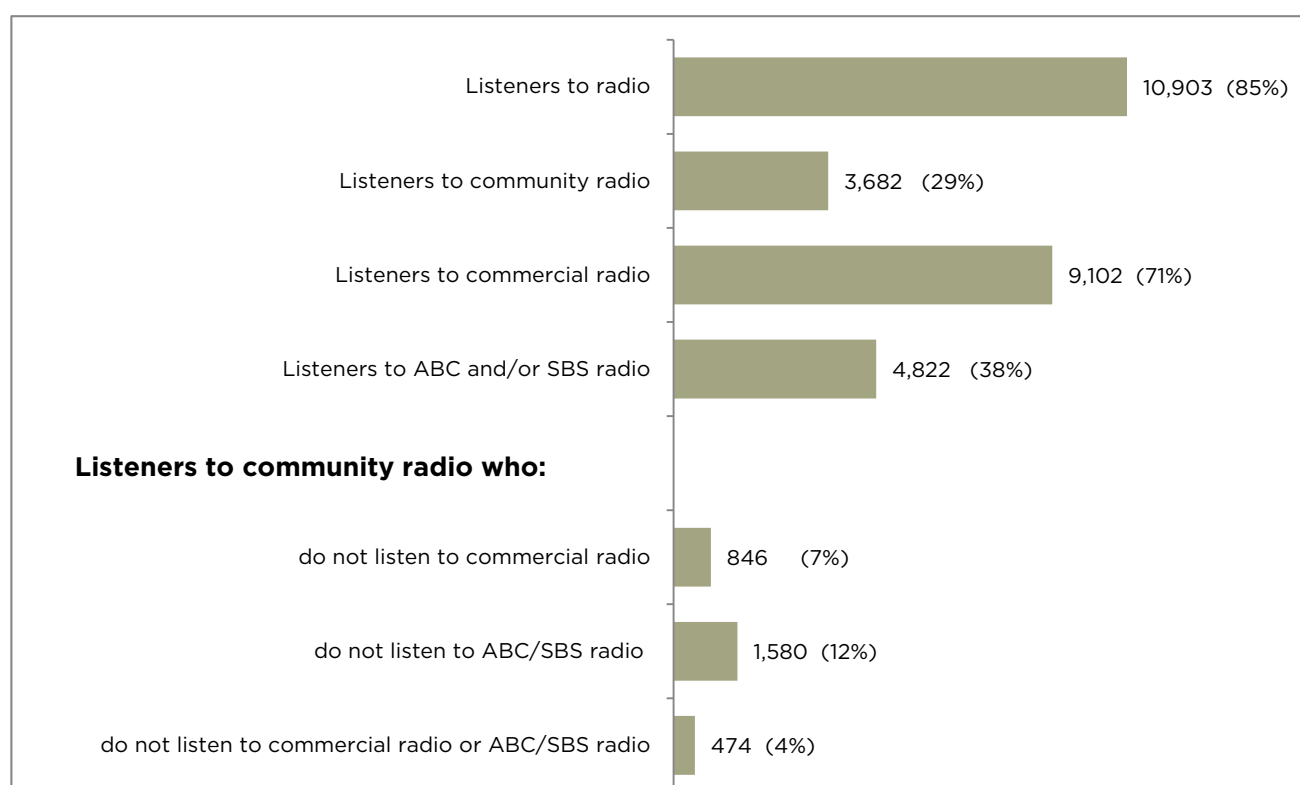
Please note between 2004 and 2010 the Commercial and ABC/SBS Radio measure was derived by means of two single questions asking if they have listened to a Commercial and ABC/SBS radio in the past week. Since 2012 each Commercial and ABC/SBS radio station in each market is listed, in the same way as the community radio stations have been asked since 2010.

Overall Radio Listening – National Metropolitan (8 Capital Cities)

- 10,903,000 people aged 15 years and over, or 85% of Australia's national metropolitan population (8 capital cities) of 12,780,000 people aged 15 years and over, listen to radio in an average week. 29% or 3,682,000, of these people listen to community radio in an average week. 71% listen to commercial radio and 38% listen to ABC and/or SBS radio in an average week.

Fig 6. Overall Radio Listening in an Average Week - National Metropolitan ('000)

Percentages are of the total metropolitan population

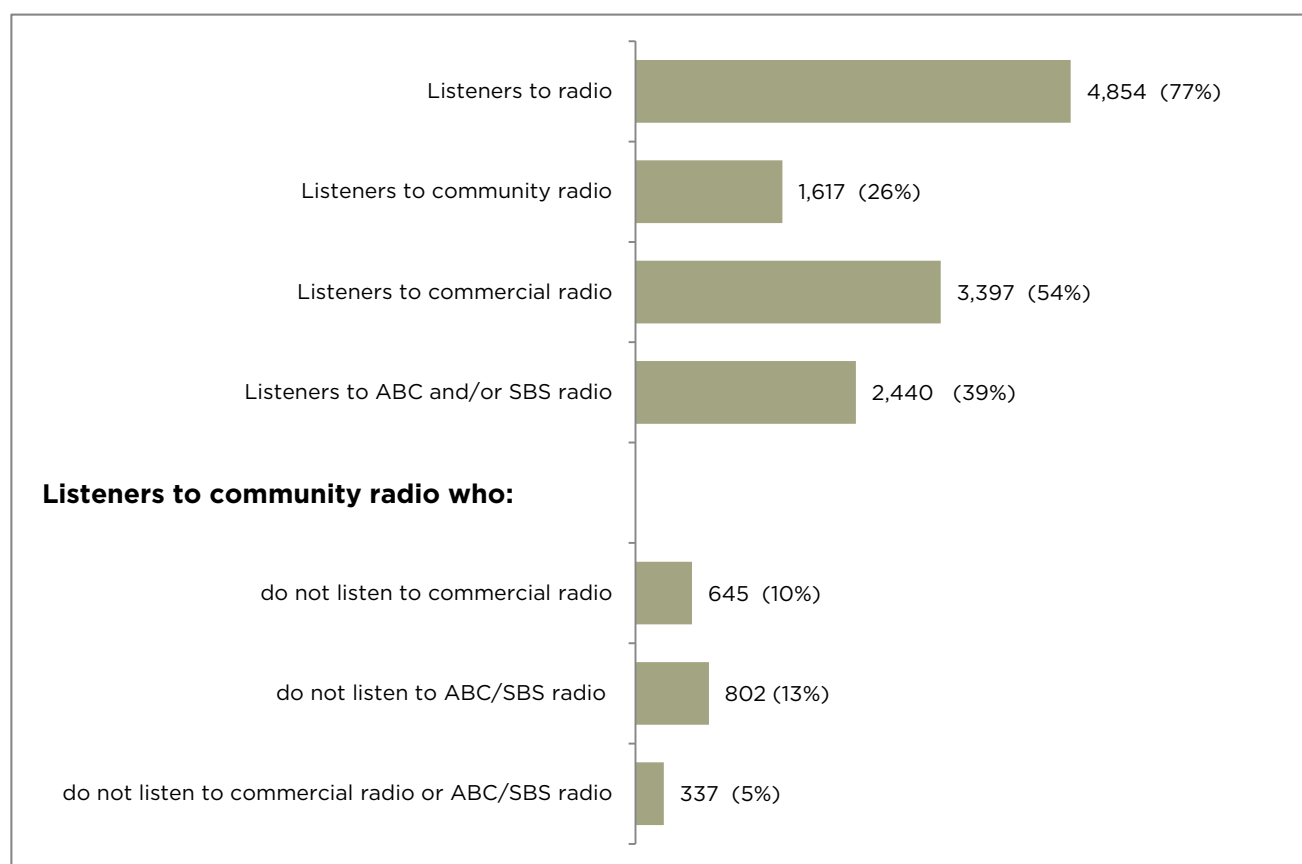


- In an average week, of all people aged 15 years and over throughout Australia's national metropolitan areas (12,780,000 people):
 - 846,000 people, or 7%, listen to community radio but not commercial radio;
 - 1,580,000 people, or 12%, listen to community radio but not ABC/SBS radio; and
 - 474,000 people, or 4%, listen to community radio exclusively, that is, listen to community radio but not commercial radio or ABC/SBS radio.
- Corresponding figures to the above for all main geographical areas of Australia are shown in the [Area Fact Sheets](#) later in this report.

Overall Radio Listening – National Non-Metropolitan

- 4,854,000 people aged 15 years and over, or 77% of Australia's national non-metropolitan population (Australia minus 8 cities) of 6,285,000 people aged 15 years and over, listen to radio in an average week. 1,617,000 people aged 15 years and over (26%) listen to community radio in an average week. 54% listen to commercial radio and 39% listen to ABC and/or SBS radio in an average week.

Fig 7. Overall Radio Listening in an Average Week- National Non-Metropolitan ('000)
Percentages are of the total non-metropolitan population

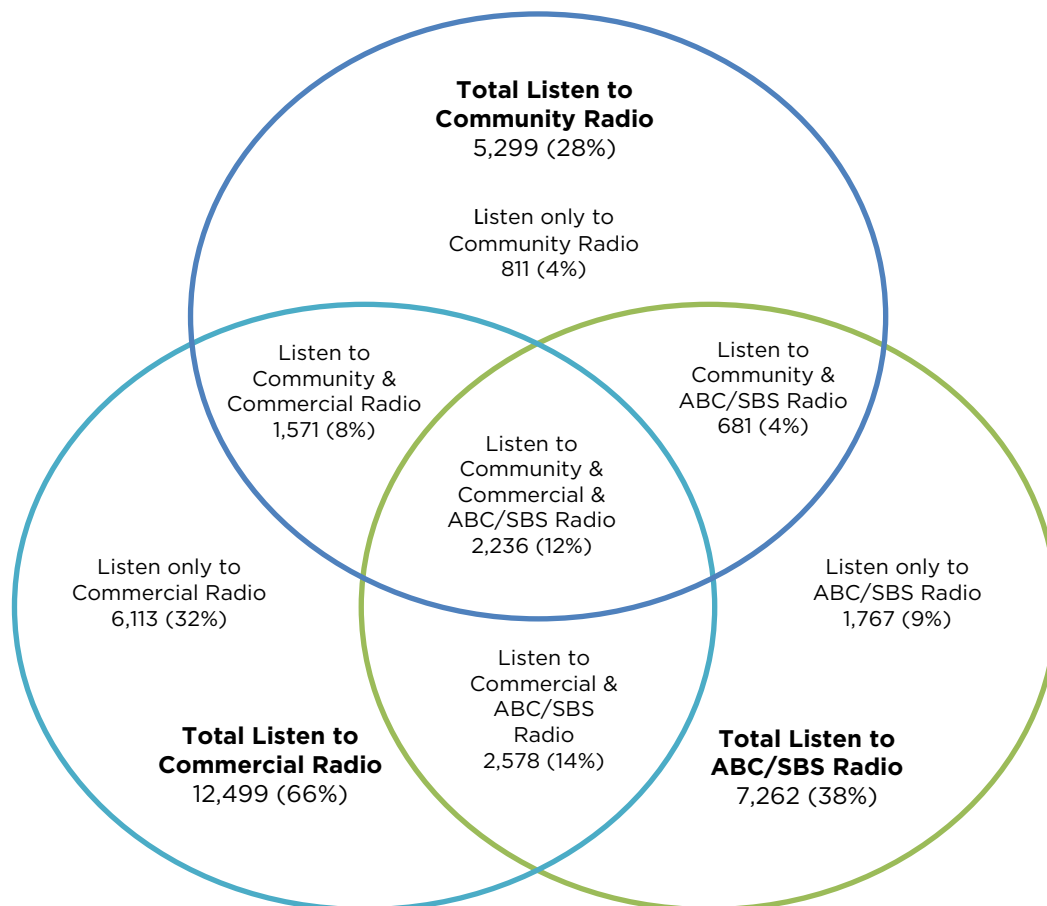


- In an average week, of all people aged 15 years and over throughout Australia's non-metropolitan areas (6,285,000 people):
 - 645,000 people, or 10%, listen to community radio but not commercial radio;
 - 802,000 people, or 13%, listen to community radio but not ABC/SBS radio; and
 - 337,000 people, or 5%, listen to community radio exclusively, that is, listen to community radio but not commercial radio or ABC/SBS radio.
- Corresponding figures to the above for all main geographical areas of Australia are shown in the [Area Fact Sheets](#) later in this report.

Overlapping Weekly Radio Audiences – Australia

Many people listen to a mix of community, commercial and/or government radio stations:

Fig 8. Overlapping Radio Audiences – Australia ('000)



The circles above (not to scale) diagrammatically depict how radio audiences overlap for Australians aged 15 years and over as a whole. The top circle depicts Australia's 5,299,000 community radio listeners aged 15 years and over in an average week, and shows how these consist of:

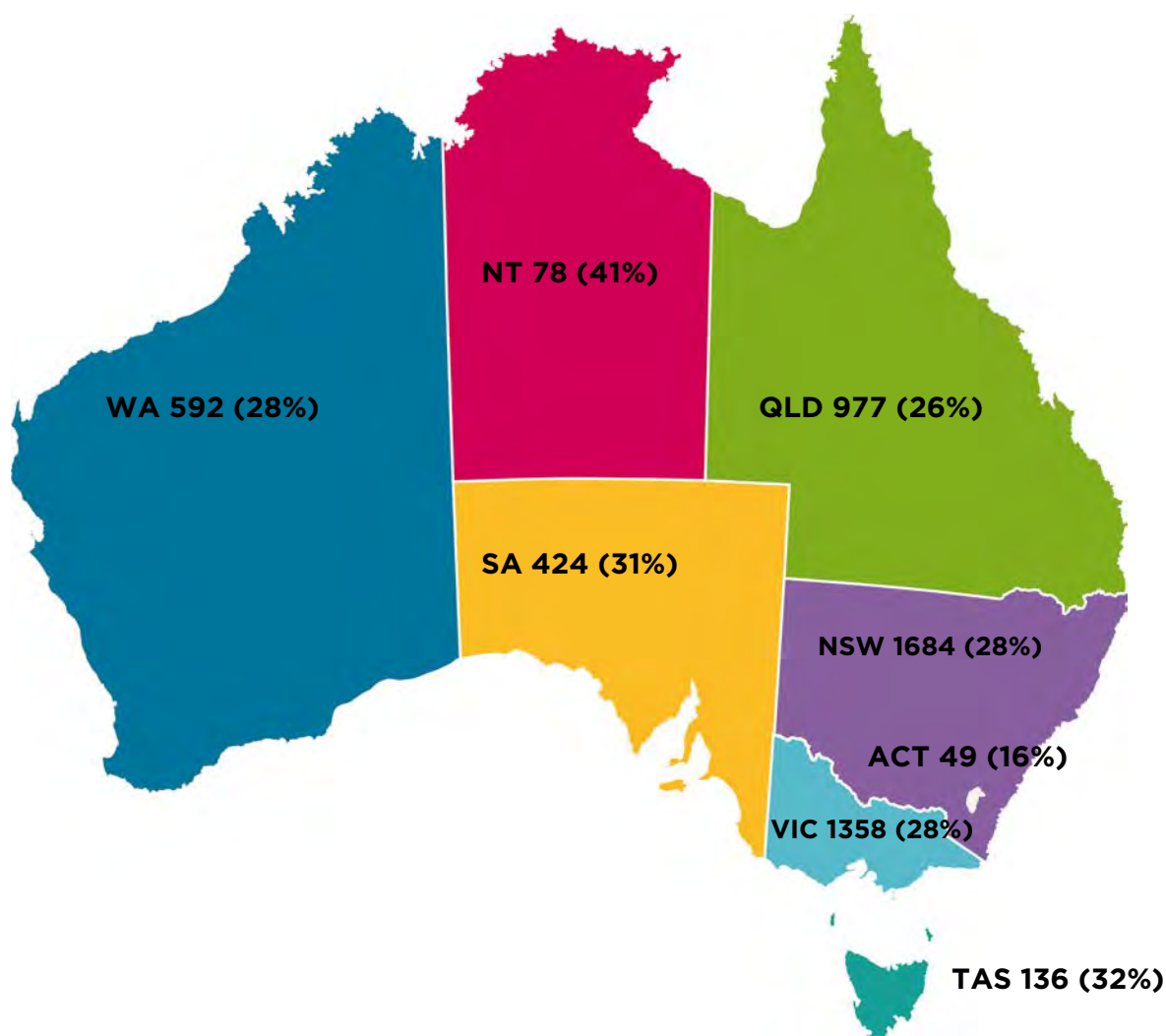
- 1,571,000 people who listen to community radio and commercial radio but not ABC/SBS radio (8%);
- 681,000 people who listen to community radio and ABC/SBS radio but not commercial radio (4%);
- 2,236,000 people who listen to community radio, commercial radio and ABC/SBS radio (12%); and
- 811,000 people who listen to community radio exclusively, that is, listen to community radio but not commercial radio or ABC/SBS radio (4%).

The left-hand circle depicts Australia's 12,499,000 commercial radio listeners aged 15 years and over in an average week, and the right-hand circle depicts Australia's 7,262,000 ABC/SBS radio listeners aged 15 years and over in an average week. In each case, the circle consists of four segments corresponding to the above four segments for community radio.

Listeners to Community Radio by State

Australia's 5,299,000 community radio listeners aged 15 years and over are shown by state below (Figure 9). The proportion listening to community radio in an average week varies considerably by state from a high of 41% of the population aged 15 years and over in the NT to a low of 16% in the ACT.

**Fig 9. Community Radio Listeners Aged 15+ by States
(‘000 and % of population 15+ in each State)**



Exclusive Community Radio Listeners by State

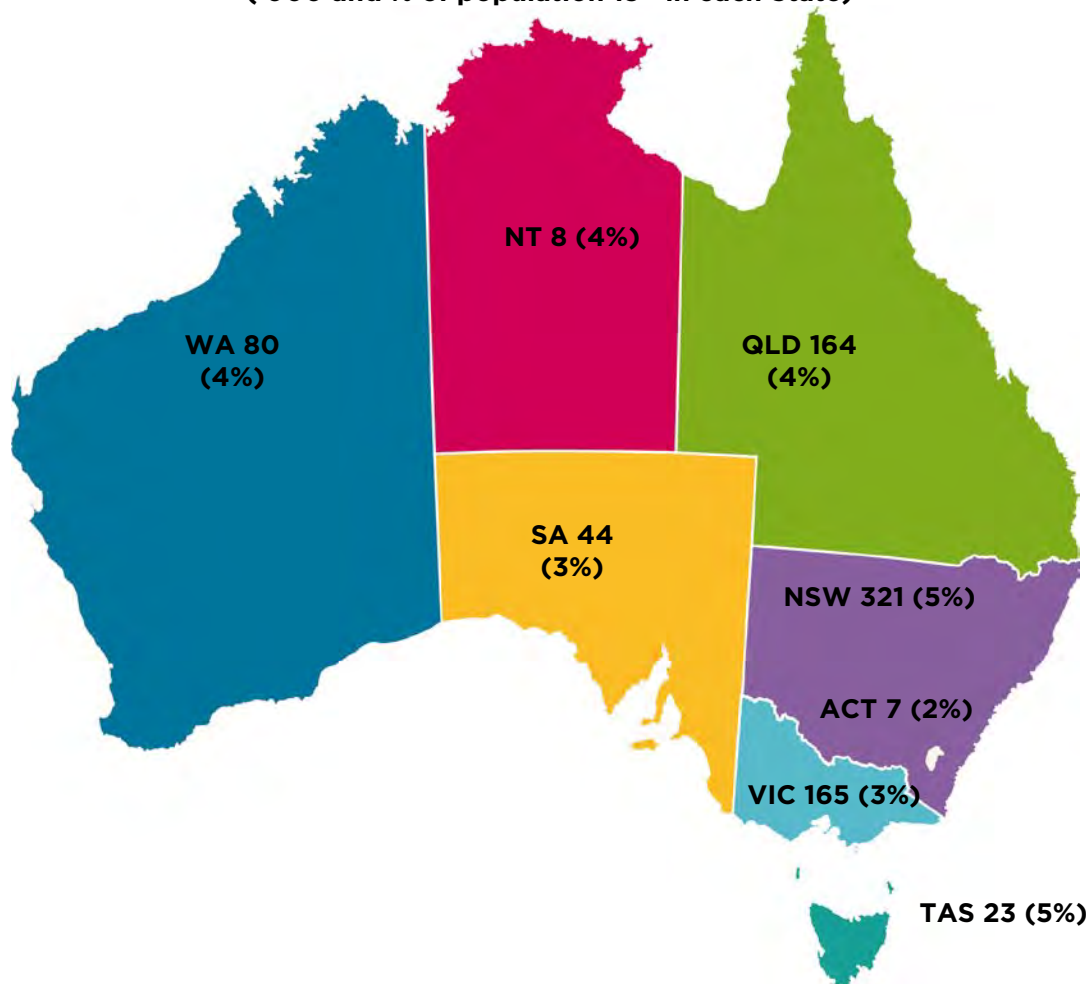
The 811,000 people aged 15 years and over who listen to community radio exclusively in an average week are shown below by state (Figure 10). These people listen to community radio but not commercial radio or ABC/SBS radio.

NSW has the highest level of exclusive community radio listeners as a proportion of the whole population, with 5% of residents aged 15 years and over listening to community radio in an average week but not listening to commercial radio or ABC/SBS radio.

The remainder of the states have between 2% and 4% of total residents aged 15 years and over exclusively listening to community radio in an average week.

Also, due to its larger population, as a percentage of the total exclusive audience NSW exclusive listeners account for 40% of Australia's 811,000 exclusive community radio listeners aged 15 years and over in an average week. Queensland and Victoria contribute 20% each of all exclusive community radio listeners.

**Fig 10. Exclusive Community Radio Listeners Aged 15+ by States
(‘000 and % of population 15+ in each State)**



Listeners to Community Radio by Metro versus Non-Metro

Across Australia, the proportion of residents aged 15 years and over in metropolitan areas who listen to community radio in an average week is 29%, while in non-metropolitan areas it is 26%. The biggest variations between cities and regional areas occur in WA where city residents are twice as likely to listen to community radio, than regional residents and in NSW you have the opposite where regional residence are more likely to listen to community radio, than city residents.

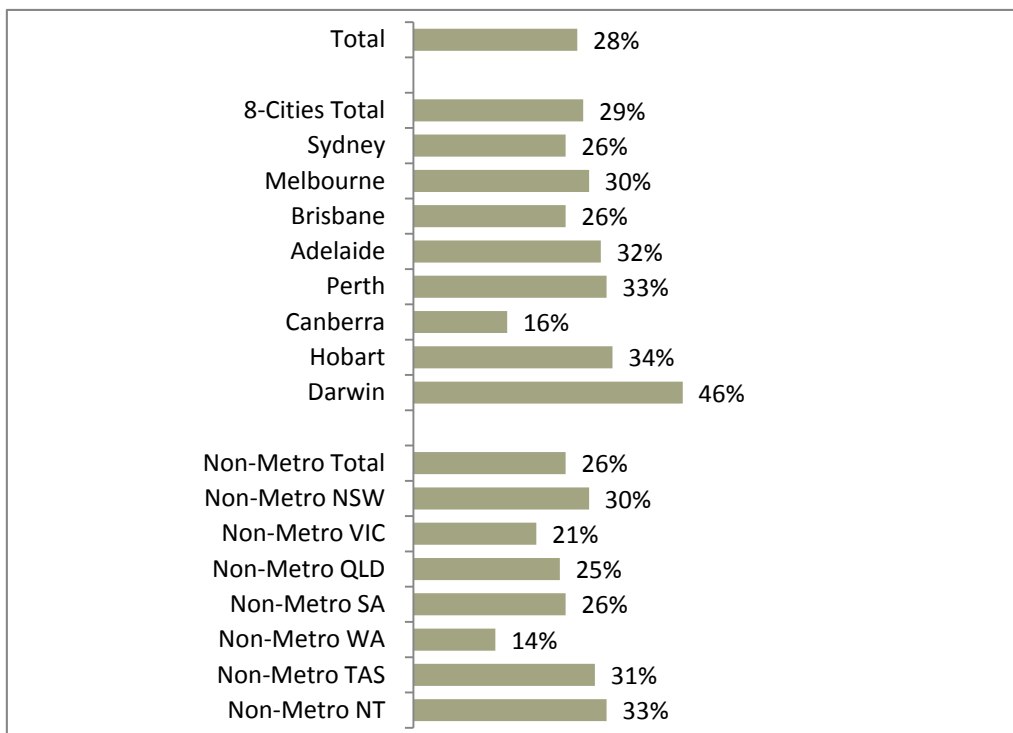
As a proportion of the population, Darwin is the capital city with the highest level of community radio listening, with 46% of its residents aged 15 years and over having listened to community radio in the last week. This is slightly more than the average for the non-metropolitan area of the NT, which has a community radio listening audience of 33%.

At the other end of the spectrum, non-metropolitan WA has one of the lowest proportions of its residents aged 15 years and over listening to community radio, with 14% having listened in the last week. Of the capital cities, Canberra has the lowest level of listenership, with almost 16% of its residents aged 15 years and over having listened to community radio in the last week.

While the non-metropolitan area of WA has a relatively low level of community radio listening, almost a third of the Perth population aged 15 years and over listen to community radio in an average week.

Fig 11. Community Radio Listeners Aged 15+ by Metro vs Non-Metro

Percentages are of the total population



Listeners to Community Radio by Demographic Group

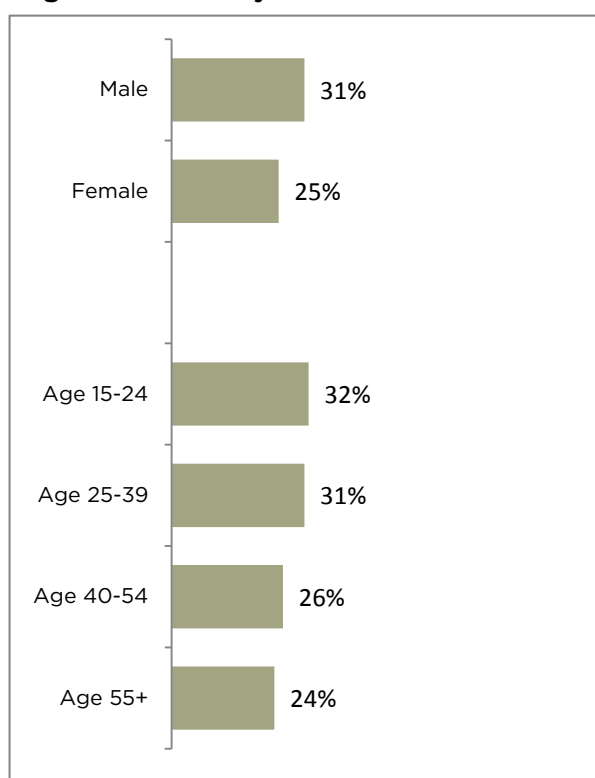
Gender

Almost one-third of all Australian men aged 15 years and over listen to community radio in an average week. Women are slightly less likely than men to listen to community radio, with almost 1 in 4 of all women aged 15 years and over listening to community radio in an average week.

Age

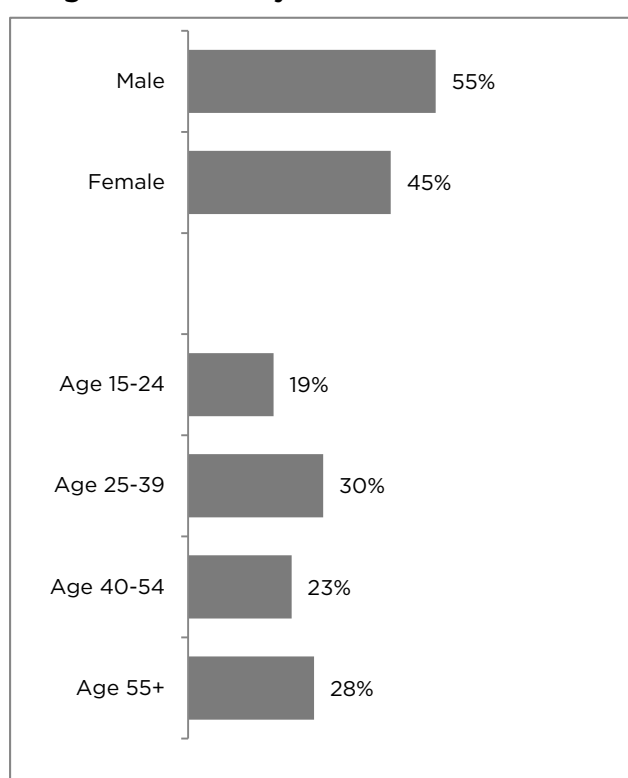
At least one quarter of all people in each age group listen to community radio in a typical week, the breakdown by age group is as follows: people aged 15-24 years have the greatest proportion of listeners (32%), followed by people aged 25-39 years (31%) and then people aged 40-54 years (26%) and people aged 55+ years (24%).

Fig 12. Community Radio Listeners Reach



Percentages are of the total population

Fig 13. Community Radio Listeners Profile



Percentages are of community radio Listeners

Reach: The percentage of a group/sub-group who listen to community radio. For example, 31% of all men aged 15+ listen to community radio in an average week.

Profile: As a proportion of all community radio listeners, what percent are from each group/sub-group. For example, men aged 15 years and over account for 55% of all community radio listeners aged 15 years and over in an average week.

When comparing reach to profile figures it is important to remember which audience you are describing. Reach figures describe the wider population while profile figures describe the community radio listener population.

Looking at the profile figures, men account for more than half of community radio listeners in an average week. In terms of age groups, people aged 15-24 years account for 19% of listeners. The other three age groups each contribute at least one-quarter of listeners, with people aged 55 years and over accounting for 28% of weekly listeners.

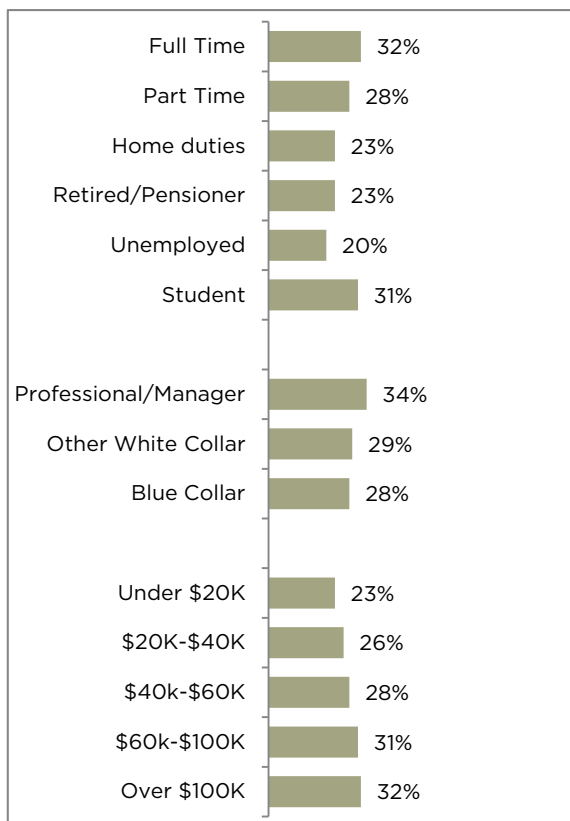
Employment Status

Over one quarter of all full-time workers, part-time workers and students listen to community radio in a typical week. Pensioners, people who are doing home duties and unemployed people are less likely to listen to community radio, with about 1 in 5 tuning in over a typical week.

Almost a third of blue collar workers are likely to listen to community radio in an average week, and professionals/managers and other white collar workers are even more likely to be listeners.

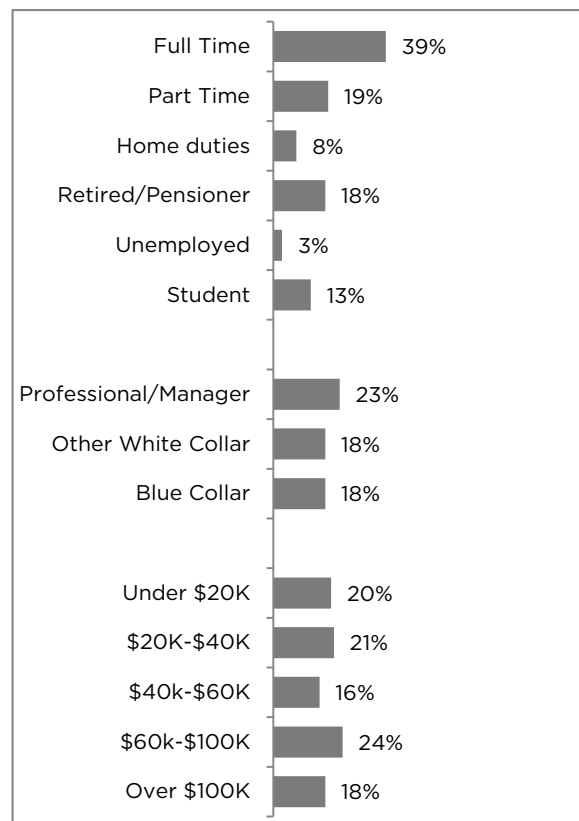
Community radio listening is marginally more likely among people whose gross income is between \$40,000 and over \$100,000 per year, but income is not a noteworthy indicator of listening.

Fig 14. Community Radio Listeners Reach



Percentages are of the total population

Fig 15. Community Radio Listeners Profile



Percentages are of community radio Listeners

In terms of describing the community radio listening population in an average week, 39% are employed full time with a further 19% employed part time. Pensioners/retired people account for 18% of listeners and students make up just over 1 in 10 listeners.

Community radio listeners tend to be in professional/managerial roles (1 in 4); however 18% work in other white collar roles and 18% in blue collar occupations.

As a proportion of community radio listeners in an average week, 18% earn over \$100,000 pa gross including tax, 24% earn \$60-\$100,000, 16% earn \$40-\$60,000 and 21% earn \$20 - \$40,000. 20% earn less than \$20,000.

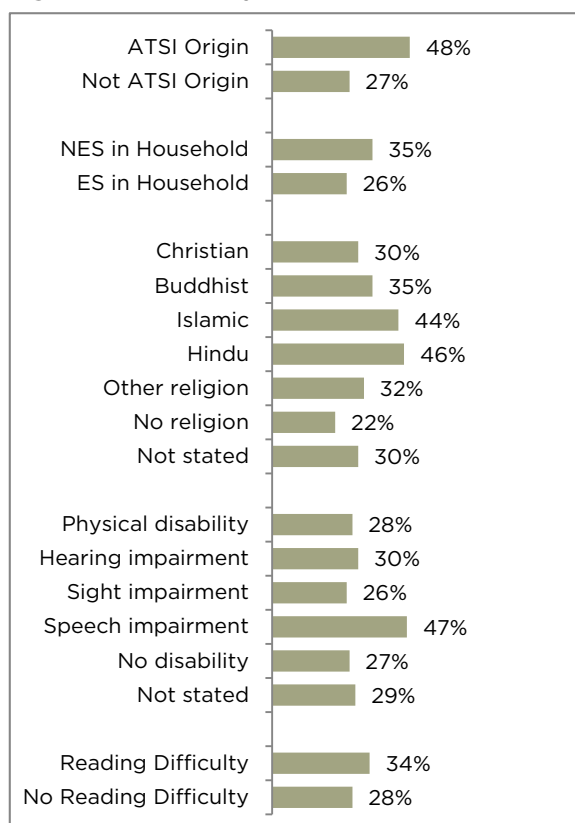
Language and Ethnicity

Over one third of people who regularly speak a language other than English in their household, listen to community radio in an average week. This is higher than for people who speak English in their household.

Over one-third of people who indicated that they identify as Aboriginal and Torres Straight Islanders, listen to community radio in an average week. This is significantly higher than for people from non-Aboriginal and non-Torres Straight Islanders background.

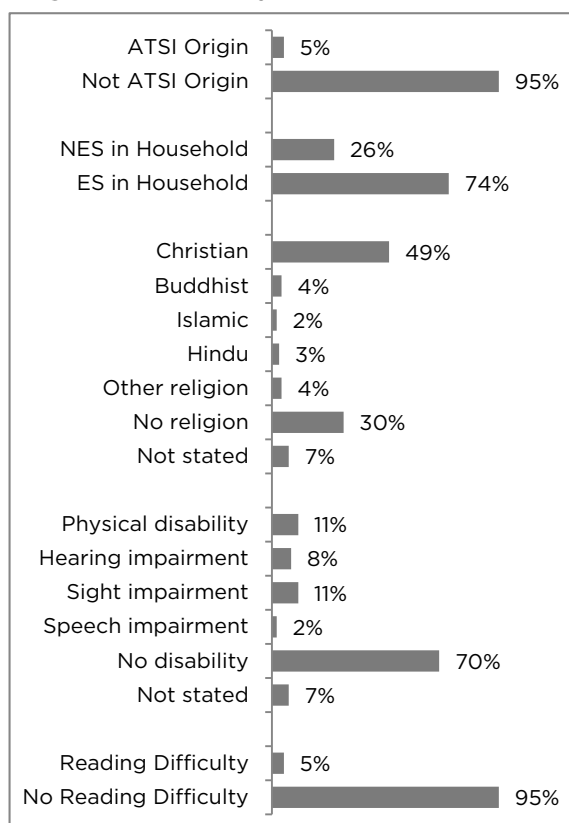
As the chart below also shows, there is a relatively high proportion of Hindus (46%) and Muslims (44%) listening to community radio in an average week.

Fig 16. Community Radio Listeners Reach



Percentages are of the total population

Fig 17. Community Radio Listeners Profile



Percentages are of community radio listeners

NES = non-English speaking ES = English speaking

One in four community radio listeners in an average week belong to households where English is not regularly spoken.

The remaining listeners are all English-speaking in their households.

People of Christian faith account for almost five in ten community radio listeners in an average week, followed by 30% who have no religious beliefs.

The below table compares the profile of community radio listeners with the profile of commercial radio listeners, ABC/SBS listeners, all radio listeners, and with the overall population.

The table shows that people who don't speak English at home, identify as Indigenous Australians or have a Christian religious faith are more likely to listen to community radio than to commercial radio or the ABC and SBS.

Fig 18. Profile of Radio Listeners

Percentages are of people who listened to radio in the last week

	Community Radio %	Commercial Radio %	ABC/SBS %	All Radio %	Population 15+ %
Total	100	100	100	100	100
Male	55	49	58	50	49
Female	45	51	42	50	51
Age 15-24	19	19	20	17	16
Age 25-39	30	27	25	26	26
Age 40-54	23	26	22	25	25
Age 55+	28	28	33	32	32
Metro	69	73	66	69	67
Non-Metro	31	27	34	31	33
Full time	39	37	37	36	34
Part time	19	21	19	20	19
Home duties	8	10	6	9	9
Retired/pensioner	18	17	20	20	21
Unemployed	3	4	3	4	5
Student	13	13	13	12	11
Professional /Exec.	23	19	22	19	18
Other White Collar	18	20	16	18	18
Blue Collar	18	19	19	18	17
Not Working	41	43	43	44	47
Under \$20K	20	23	21	23	24
\$20K -\$40K	21	21	19	22	23
\$40K -\$60K	16	16	17	16	16
\$60K -\$100K	24	22	24	22	21
Over \$100K	18	17	19	17	16
Indigenous Australians	5	3	3	3	3
Non-Indigenous	95	97	97	97	97
NES in Household	26	21	22	21	20
ES in Household	74	79	78	79	80

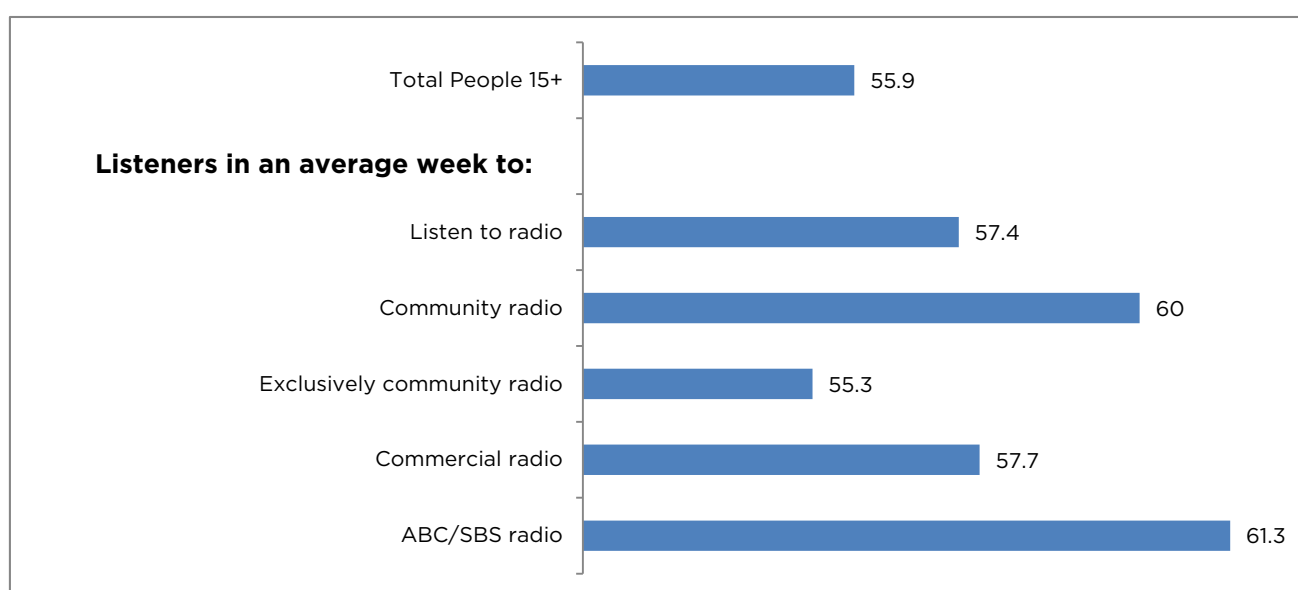
NES = Non-English Speaking. ES = English speaking

	Community Radio %	Commercial Radio %	ABC/SBS %	All Radio %	Population 15+ %
Total	100	100	100	100	100
Christian	49	49	44	48	46
Buddhist	4	3	4	3	3
Islamic	2	2	2	2	2
Hindu	3	2	3	2	2
Other religion	4	4	4	4	4
No religion	30	35	37	36	38
Refused	7	6	6	6	6
Physical disability	11	9	10	10	11
Hearing disability	8	6	7	7	7
Sight disability	11	10	11	11	11
Speech disability	2	1	1	1	1
No disability	70	73	72	72	71
Refused	7	6	6	6	6
Reading Difficulty	5	3	3	4	4
No Reading Difficulty	95	97	97	96	96

Compared to the average annual gross income for all Australians aged 15 years and over (\$55,900), community radio listeners in an average week earn marginally more (\$60,000). ABC/SBS listeners are even higher income earners and commercial radio listeners a marginally lower income.

Those people who exclusively listen to community radio tend to be lower income earners, averaging \$55,300.

Fig 19. Average Income (\$000)

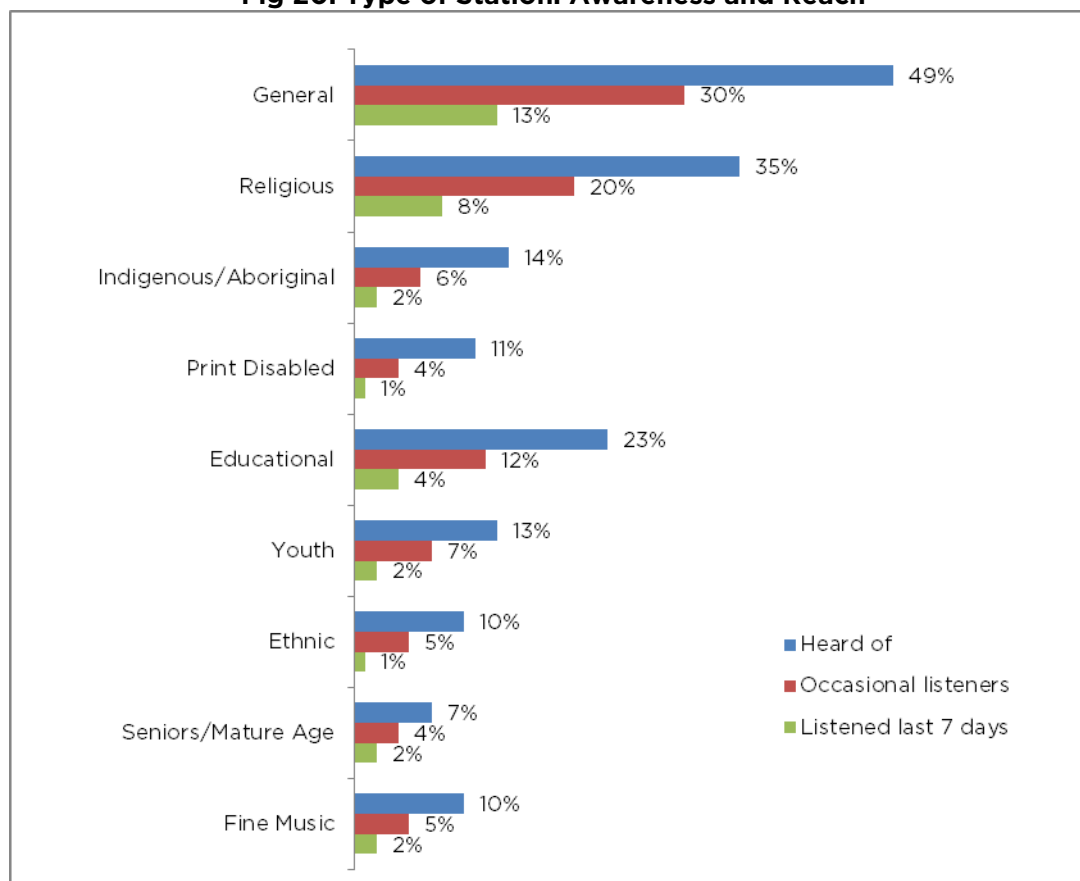


Listeners to Community Radio by Station Type

Community radio stations are classified according to the type of licence with which they have been issued. Categories include general stations, religious stations, Indigenous stations, print-disabled stations, educational stations, youth stations, ethnic stations, seniors/mature age stations and fine music stations. Nevertheless, most community radio stations are under the general content licence.

The chart below shows the proportion of people who have heard of stations in each category (the top bar), the proportion who are occasional listeners (the middle bar) and the proportion of people who listened in the last 7 days (the lower bar).

Fig 20. Type of Station: Awareness and Reach



The chart above shows that the most common kinds of stations (the general content stations), have a commensurate share of the listening audience. Almost half (49%) of the population has heard of at least one of the stations in this category, and a third (30%) are occasional listeners of a general station – representing 5,681 million people in the population. One in eight (13%) of the population, or 2,451,000 people, listen to a general station in an average week. Religious stations are the next best known category of community radio stations and similarly have the second largest proportion of listeners, followed by educational stations. One in five Australian adults (3,841 million people) are occasional listeners of religious community radio station, as are one in ten (12%) of an educational station.

One in every eight (13%) Australians over the age of 15 years listened to one or more of the general community radio stations in the seven days prior to the survey. The proportion of Australians listening to a religious community radio station in the last 7 days was 8%, 4% for educational and 2% for youth stations.

The table below shows the profile of listeners to community radio by station type. The age and gender profile varies slightly by station type as expected, for example 'youth' stations have a much younger profile than the 'senior/mature aged' stations.

Fig 21. Profile of Listeners to Community Radio in the last 7 Days by Station Type

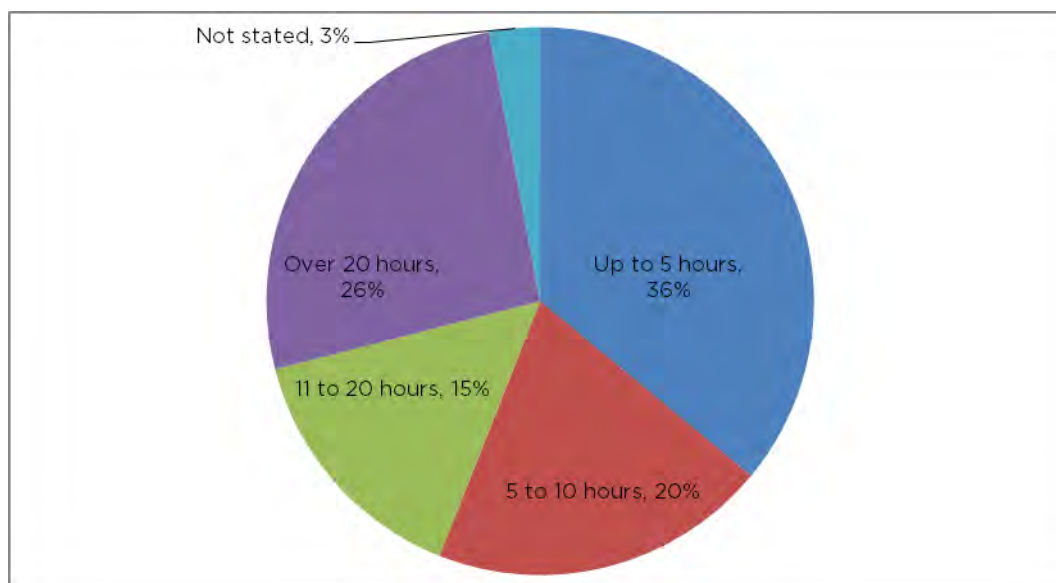
	General	Religious	Indigenous	Print Disabled	Educational	Youth	Ethnic	Seniors/ Mature Age	Fine Music
	%	%	%	%	%	%	%	%	%
Total	100	100	100	100	100	100	100	100	100
Male	58	53	55	56	61	58	63	51	59
Female	42	47	45	44	39	42	37	49	41
15-24	15	25	20	17	19	26	23	20	18
25-39	28	34	33	45	30	42	45	16	29
40-54	23	25	26	13	25	25	19	19	17
55+	33	17	20	25	25	7	13	47	36
Metro	56	83	70	91	95	77	98	40	96
Non-metro	44	17	30	9	5	23	2	60	4
NSW	35	28	21	37	21	42	51	17	42
ACT	1	1	-	2	-	-	3	-	-
VIC	29	28	14	38	25	8	18	12	35
QLD	14	22	39	7	9	16	10	49	19
SA	7	8	0	7	6	31	9	-	4
WA	7	9	19	6	39	-	9	22	-
TAS	4	3	-	3	-	2	-	-	-
NT	2	1	7	-	-	-	-	-	-

Time Spent Listening to Community Radio

The graph below shows the proportion of community radio listeners according to how much time they spend listening to radio in a typical week.

Almost two thirds of community radio listeners listening in an average week listen for at least 5 hours per week, and 41% listen for over 10 hours per week.

Fig 22. Hours spent listening in a typical week



Typically, community radio listeners spend 15.43 hours listening to community radio per week. Of this, there is an average of 2.45 hours per weekday. People in WA spend the most time listening to radio, averaging 16.72 hours per week or 2.71 per weekday.

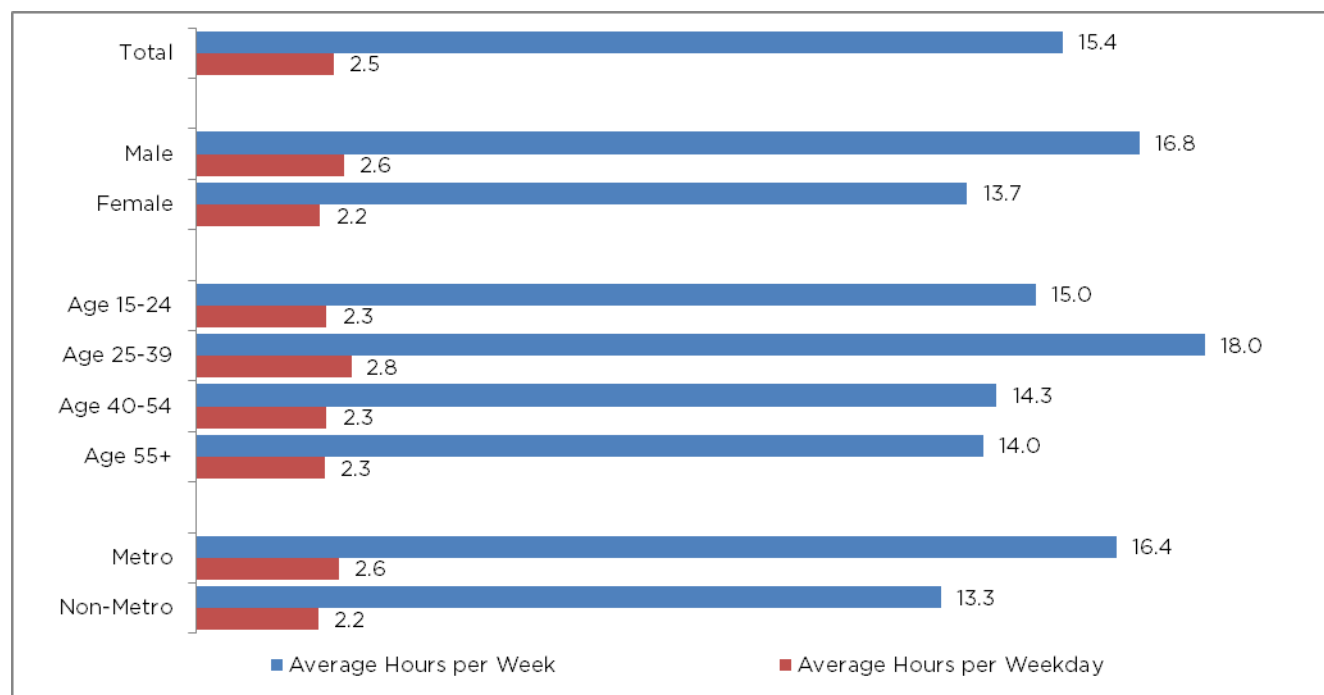
Fig 23. Average no. of hours spent listening per week/weekday

	Per Week	Per Weekday
Australia	15.43	2.45
NSW	16.19	2.55
ACT	12.40	1.81
VIC	14.99	2.34
QLD	14.75	2.35
SA	15.15	2.42
WA	16.72	2.71
TAS	12.93	2.12
NT	13.55	2.28

People aged 25-39 years, men, and people living in metropolitan areas are more likely to spend more time listening to community radio than the average listener.

Fig 24. Average Time Spent Listening to Community Radio (Hours per Week/Weekday)
by Listeners to Community Radio in an Average Week, by demographic group

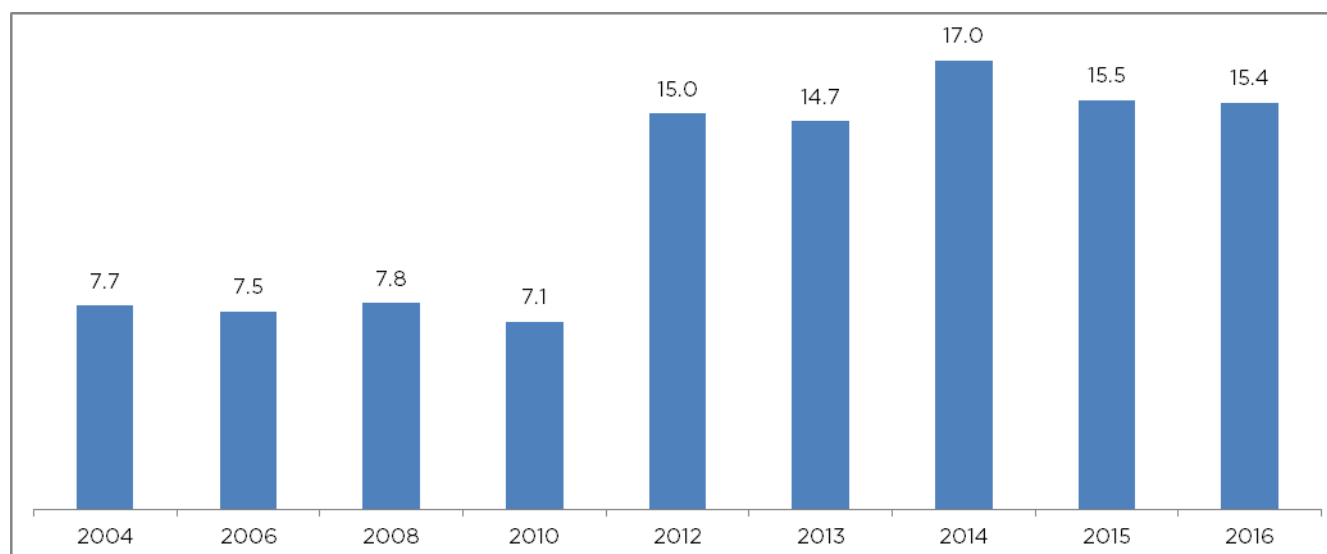
Average hours are of people who listened to community radio in the last week



The graph below shows the average time spent listening to radio over the last decade. Note that since 2012, the measure of time spent listening to community radio was asked specifically for each station, while the 2004 to 2010 surveys question was a general question about all community radio listening.

Fig 25. Trend - Average Time Spent Listening to Community Radio (Hours per Week)
by Listeners to Community Radio in an Average Week

Average hours are of people who listened to community radio in the last week



Time of Day Spent Listening to Community Radio

The table below shows that 85% of weekly community radio listeners listened on at least one weekday (Monday to Friday), and 61% listened at some point over the weekend; this also means that 15% listened exclusively on the weekends. It also shows that weekday listening is at its highest during the workday breakfast session, with 51% of all community radio listeners tuning in at that time, and Drive with 49% of the community radio audience listening at that time. The peak listening time on weekends is a more leisurely breakfast and mid-morning session with 31% of community radio listeners tuning in during that period.

The two right-most columns show the proportion of all community radio listeners that listen on an average weekday and an average weekend day, being 55% and 48% respectively.

From the perspective of a prospective sponsor, the average audience represents the proportion of people they would reach if they ran sponsorship messages on any one day – for instance, a message that was repeated regularly on one weekday would reach 55% of community radio listeners. If the message went to air throughout every day Monday to Friday, it would reach 85% of community radio listeners.

NOTE: In the 2012 survey, the question about time spent listening to radio was enhanced to ask about the time spent with each community radio station on each of the seven days prior to the survey. Previously the question asked generally about the amount of time spent listening to community radio in the week prior to the survey. This therefore adds granularity and precision to the results of this measure.

Fig 26. Community Radio Listening by Day Part

Percentages are of people who listened to community radio in the last week

	Cumulative Week (Mon-Sun) %	Cumulative Workdays (Mon-Fri) %	Cumulative Weekend (Sat-Sun) %	Average Workdays (Mon-Fri) %	Average Weekend (Sat-Sun) %
Total	98	85	61	55	48
5am – 9am Breakfast	60	51	31	29	23
9am – Noon Mid-morning	60	46	31	24	22
Noon – 3pm Afternoon	53	41	27	21	20
3pm – 7pm Drive	57	49	26	26	18
7pm – Midnight Evening	34	27	18	11	12
Midnight – 5am Late night	18	15	19	6	6

Figure 27 below shows the cumulative weekly listening to community radio by day part by demographic, and geographic groups.

The most common times to listen are breakfast and mid-morning, with six in ten (60%) listeners to community radio listening between 5am and noon in the last 7 days. This is closely followed by drive time where 57% listeners to community radio listened between 3pm and 7pm in the last 7 days. The third most popular time slot is the afternoon with 53% of community radio listeners listening between noon and 3pm.

People aged 55 years and over are more likely to listen during mid-morning. People aged 25-39 years are more likely to listen to breakfast and drive.

People who live in the metropolitan areas are more likely to listen to community radio during breakfast and drive, while people living in regional areas of Australia are more likely to listen during the breakfast and mid-morning time slots.

Fig 27. Cumulative Community Radio Listening by Day Part
Percentages are of people who listened to community radio in the last week

	5am – 9am Breakfast %	9am – Noon Mid-morning %	Noon – 3pm Afternoon %	3pm – 7pm Drive %	7pm – Midnight Evening %	Midnight – 5am Late night %
Total	60	60	53	57	34	18
Male	63	60	56	60	39	23
Female	57	59	50	53	28	12
Age 15-24	69	58	58	72	43	26
Age 25-39	69	65	60	66	44	31
Age 40-54	60	56	45	54	29	12
Age 55+	46	60	50	41	21	5
NSW	59	62	54	57	39	20
ACT	53	56	50	61	22	10
VIC	58	58	51	60	36	20
QLD	67	59	55	58	29	18
SA	60	61	54	54	31	16
WA	60	61	54	55	27	13
TAS	57	57	52	48	26	9
NT	60	57	45	54	18	6
Metro	61	59	54	61	38	22
Non-Metro	60	62	52	50	25	10

Value of Community Radio and its Services to the Australian Community

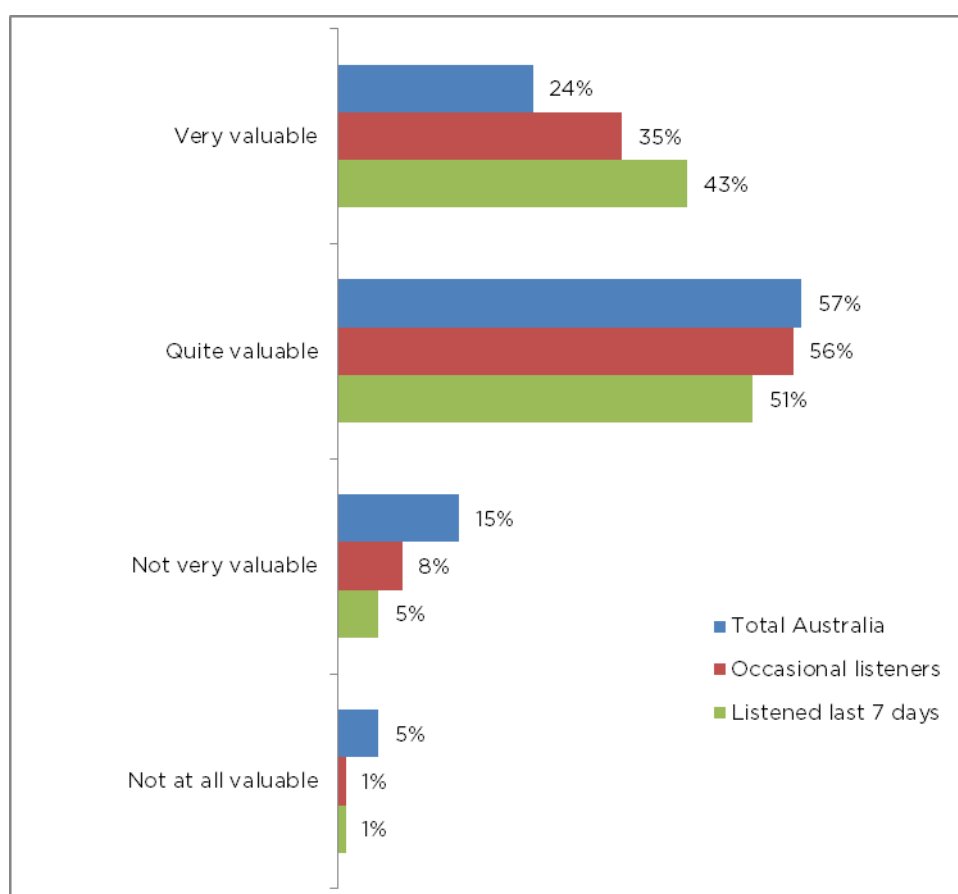
Most Australians believe in community radio. Figure 28 below shows how well the whole community values community radio. The top bar in the chart below represents the total population, the middle bar the views of occasional community radio listeners, while the lower bar is of those who listened in the last 7 days.

94% of people who have listened to community radio in the last 7 days stated that community radio and its services were a valuable asset to the Australian community - with 43% saying it was 'very valuable' and 51% 'quite valuable'.

Overall, a quarter (24%) of the population considers it 'very valuable'. Over half (57%) consider it 'quite valuable'.

Fig 28. Perception of Value of Community Radio

Percentages are of the total population



It is clear that both occasional and more recent listeners appreciate community radio. A third (35%) of occasional listeners and four in ten (43%) of listeners in the last 7 days said that community radio is 'very valuable'.

The graph below shows the perceived 'net value' (Very Valuable/Quite Valuable) of community radio and its services to the Australian community by year. The figures show that the net value figures are very stable amongst people who listened to community radio in the last 7 days.

The value measure amongst the Australian population has been included since the 2012 survey. It shows the value amongst the general population has greater fluctuation compared with people who are engaged and use the medium of community radio.

Fig 29. Trend - Net Valuable (Very valuable/Quite Valuable) of Community Radio
Percentages are of the total population

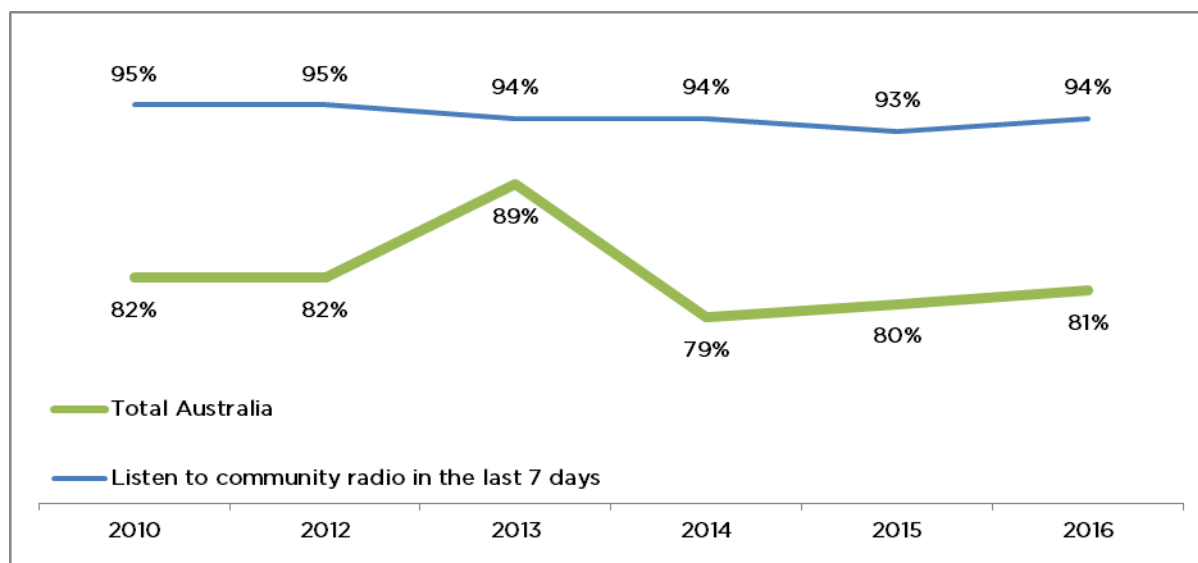


Figure 30 shows that certain groups in the population rated the value of community radio greater than others. For instance, women were more likely to rate community radio and its services as 'very valuable', while men were most likely to rate it as 'quite valuable'.

The populations that were most likely to rate the value of community radio highest were those living in the ACT (97%), Queensland (95%) and Tasmania (95%)

Those living in non-metropolitan areas are more likely to rate community radio and its services as 'very valuable' compared to people living in metropolitan areas.

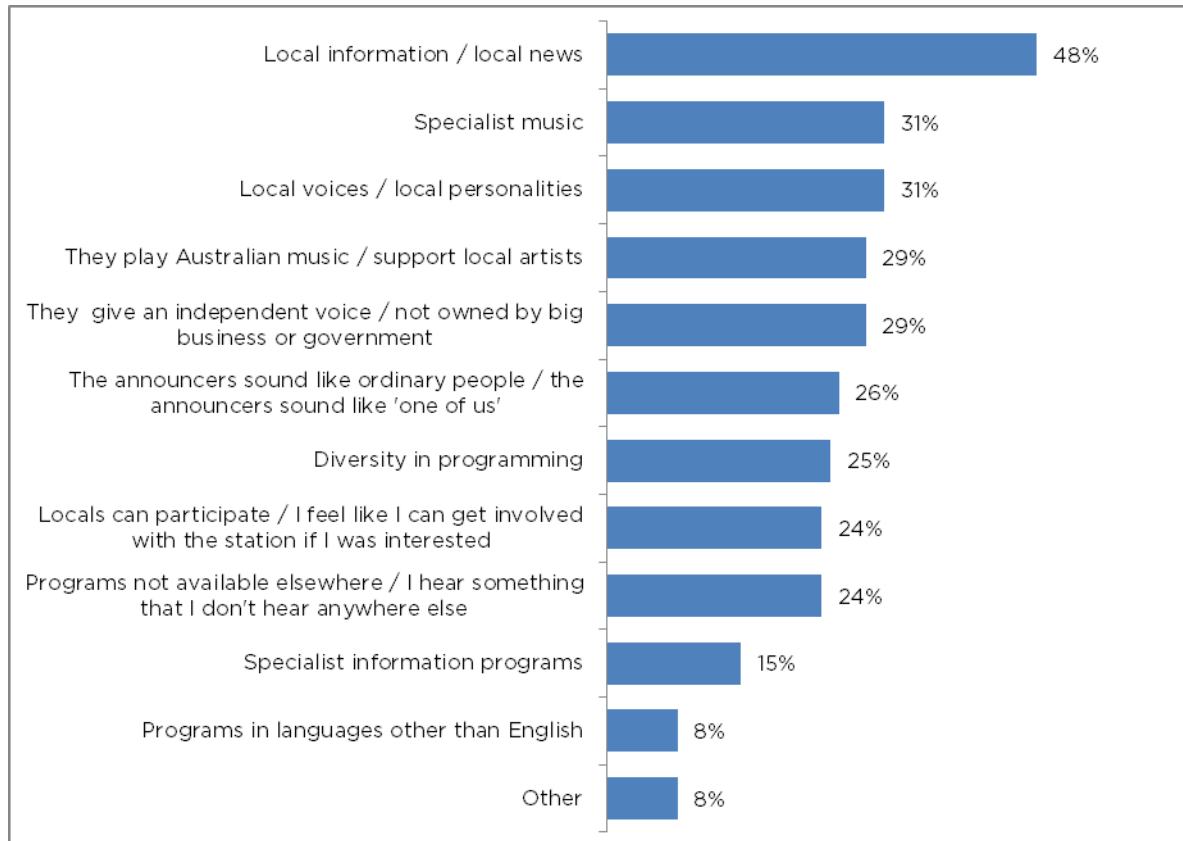
Fig 30. Value of Community Radio and its Services by Demographic and Geography
Percentages are of people who listened to community radio in the last week

	Very Valuable %	Quite Valuable %	Not Very Valuable %	Not at all Valuable %
Total	43	51	5	1
Male	39	53	6	1
Female	47	48	4	1
Age 15-24	36	52	9	3
Age 25-39	42	53	4	1
Age 40-54	44	51	5	0
Age 55+	48	48	4	0
NSW	40	54	5	1
ACT	50	47	3	0
VIC	43	50	6	1
QLD	44	51	4	1
SA	41	50	7	2
WA	47	47	5	1
TAS	48	47	4	0
NT	53	39	6	2
Metro	40	53	6	1
Non-metro	50	46	4	0

Reasons for Listening to Community Radio

Community radio keeps people connected to their local communities. Nearly five in ten (48%) people who listen to community radio in an average week said that they did so because it gave them local information and local news – a service which is quite exclusive to this media.

Fig 31. Reasons for Listening to Community Radio in the last 7 days
Percentages are of the community radio listeners, listening in the last 7 days



After “*local information/local news*”, listening to their music of choice (“*specialist music*”) is the second most common reason to listen to community radio. “*Local voices/local personalities*” is the third most stated reason with 31%, followed by 29% who tune in to community radio to hear Australian music.

Other strong reasons to listen to community radio are to hear independent views (29%), that locals can participate/get involved (24%) and that there are programs not available elsewhere (24%).

Other reasons mentioned included: just flicking through, not commercial, commercial free and like the music it plays.

For the 811,000 people aged 15 years and over who are exclusive listeners to community radio in an average week, “*local information/news*” is the key motivation for listening, followed by “*local voices/local personalities*”.

Reasons for Listening to Community Radio by Demographic Groups

For male and female listeners, listeners of all ages and metropolitan listeners, the most frequent reason for listening to community radio is that it has “*local information/local news*”. For non-metropolitan listeners, “*local information/local news*” is also the most common reason for listening to community radio. Listeners aged 15-24 years really value the “*Australian music/local artists*” on community radio.

The main difference between metropolitan and non-metropolitan listeners is that non-metropolitan listeners especially appreciate the local aspects of community radio. By contrast, metropolitan listeners rate “*specialist music programs*”, “*diversity in programming*” and “*programs in other languages*” higher than non-metropolitan listeners. The difference between metropolitan and non-metropolitan listeners is likely to be a function of both differences in content and respondents access to other media in their area.

Fig 32. Reasons for Listening to Community Radio by Listeners to Community Radio in an Average Week

Percentages are of people in each demographic that have listened to community radio in the last seven days. For example, 46% of men who had listened to community radio in the last week gave “local information” as their reason for listening.

	Male %	Female %	Age 15-24 %	Age 25-39 %	Age 40-54 %	Age 55+ %	Metro %	Non- Metro %
Local information / local news	46	50	40	44	53	54	42	61
Specialist music	32	29	33	28	30	33	33	25
Local voices / local personalities	30	31	27	25	29	39	28	36
They play Australian music / support local artists	29	29	34	27	26	32	27	34
They give an independent voice / not owned by big business or government	29	29	24	26	28	35	27	33
The announcers sound like ordinary people / the announcers sound like 'one of us'	25	28	22	22	23	36	25	30
Diversity in programming	25	25	22	27	27	23	26	22
Locals can participate / I feel like I can get involved with the station if I was interested	23	26	19	24	24	29	21	32
Programs not available elsewhere / I hear something that I don't hear anywhere else	25	23	18	21	25	30	24	24
Specialist information programs	17	12	12	14	19	14	17	9
Programs in languages other than English	9	8	7	12	8	5	11	3
Other	8	9	9	6	8	12	8	10

Some interesting contrasts in the reasons given for listening to community radio by work status are that:

- Those working part time, and therefore perhaps heavier listeners, were the most likely to appreciate the diversity of programming on community radio, specialist music and the local information.
- People who were retired were most likely to comment that they like the “*local information*”, as well as “*local voices/local personalities*”; and
- Students, listening most frequently for “*local information*” and “*Australian music/local artists*”.

**Fig 33. Reasons for Listening to Community Radio
by Listeners to Community Radio in an Average Week by Time Spent Listening**

Percentages are of people in each demographic that have listened to community radio in the last seven days

	Full Time %	Part Time %	Home duties %	Retired/ Pensioner %	Un- employed %	Student %
Local information / local news	44	48	55	55	42	45
Specialist music	29	33	26	32	29	34
Local voices / local personalities	27	33	36	41	22	23
They play Australian music / support local artists	25	32	23	36	32	35
They give an independent voice / not owned by big business or government	28	29	26	36	27	24
The announcers sound like ordinary people / the announcers sound like 'one of us'	22	26	28	37	23	22
Diversity in programming	27	28	21	21	26	20
Locals can participate / I feel like I can get involved with the station if I was interested	22	25	29	32	24	19
Programs not available elsewhere / I hear something that I don't hear anywhere else	23	25	18	29	26	20
Specialist information programs	17	17	15	13	9	9
Programs in languages other than English	9	9	10	4	10	10
Other	7	9	10	10	12	9

Reasons for Listening to Community Radio by Time Spent Listening

Regardless of how long people listen to community radio, “*local information/local news*” and “*specialist music programs*” are the key motivators for listening. Generally, as time spent listening increases, the local aspects of community radio are increasingly cited as a reason for listening.

**Fig 34. Reasons for Listening to Community Radio
by Listeners to Community Radio in an Average Week by Day Part**

Percentages are of people who listen to community radio for each amount of time in a typical week

	Total	Time Spent Listening			
	%	Up to 5h	5-10h	11-20h	20h+
	%	%	%	%	%
Local information / local news	48	44	50	54	49
Specialist music	31	28	31	34	33
Local voices / local personalities	31	26	31	34	36
They play Australian music / support local artists	29	25	27	32	37
They give an independent voice / not owned by big business or government	29	26	27	31	34
The announcers sound like ordinary people / the announcers sound like 'one of us'	26	24	23	25	34
Diversity in programming	25	22	24	27	29
Locals can participate / I feel like I can get involved with the station if I was interested	24	19	22	29	32
Programs not available elsewhere / I hear something that I don't hear anywhere else	24	22	21	28	29
Specialist information programs	31	28	31	34	33
Programs in languages other than English	8	4	8	10	13
Other	8	11	10	6	5

Reasons for Listening to Community Radio by Time of Day Spent Listening

Regardless of what time of day people listen to community radio, “*local information/local news*” and “*specialist music programs*” are the main reasons for listening. Another key factor for listening especially in the evenings was “*diversity in programming*”.

During the breakfast and mid-morning timeslots “*local information/local news*” and “*local voices/local personalities*” are more prominent reasons for listening, while in the afternoon/drive and evening timeslots music was more likely to play a bigger part in drawing in listeners with “*specialist music programs*” and “*play Australian music/support local artists*”.

**Fig 35. Reasons for Listening to Community Radio
by Listeners to Community Radio in an Average Week**

Percentages are of people who listen to community radio for at each time of day in a typical week

	5am – 9am Breakfast	9am – Noon Mid- morning	Noon – 3pm Afternoon	3pm – 7pm Drive	7pm – Midnight Evening	Midnight – 5am Late night
	%	%	%	%	%	%
Local information / local news	32	33	31	30	28	22
Specialist music	29	30	32	34	34	26
Local voices / local personalities	32	33	31	30	28	22
They play Australian music / support local artists	31	30	31	30	31	24
They give an independent voice / not owned by big business or government	29	30	30	29	30	22
The announcers sound like ordinary people / the announcers sound like 'one of us'	26	28	27	26	27	20
Diversity in programming	24	25	27	27	28	22
Locals can participate / I feel like I can get involved with the station if I was interested	26	26	25	25	25	20
Programs not available elsewhere / I hear something that I don't hear anywhere else	24	24	25	26	25	18
Specialist information programs	17	16	16	16	18	16
Programs in languages other than English	9	9	10	10	13	15
Other	7	7	7	8	5	1

Listening to Community Radio by Transmission Type

Digital radio (DAB+) has been introduced in the five mainland capital cities; Sydney, Melbourne, Brisbane, Adelaide and Perth. Just over one in five (22%) of community radio listeners listen to a community digital radio station representing a continuous growth trend from 12% in 2012 and 0% in 2010.

The table below compares radio listening by type of transmission. Since 2012 overall listening to digital radio (all transmission types, not just community) has almost tripled from 15% to 40%. While the uptake and transition to digital is strong, listening exclusively by analog (AM or FM) still accounts for 60% of listening to all radio (community, commercial, ABC / SBS).

Fig 36. Metro 5 Capital Cities Listening to Radio by Transmission Type

	All Radio %	Community Radio %	Commercial Radio %	ABS/SBS %
Total Analog and Digital	100	100	100	100
Total Analog	96	97	94	91
Total Digital	40	22	37	44
Both Analog and Digital	36	19	30	35
Analog Only	60	78	63	56
Digital Only	4	3	6	9

NLS research does not identify location of listening separated by transmission type. However, in general, the research shows that radio listening is in the car. As digital radio device penetration into cars is still at an early stage, most digital radio listening (at home, at work, or other fixed location not at home) will be accompanied by listening via another transmission platform, mostly analog. For this reason, and as not all stations are yet digital, it would be rare (3%) for a digital radio listener to not also listen to an analog station in the past week.

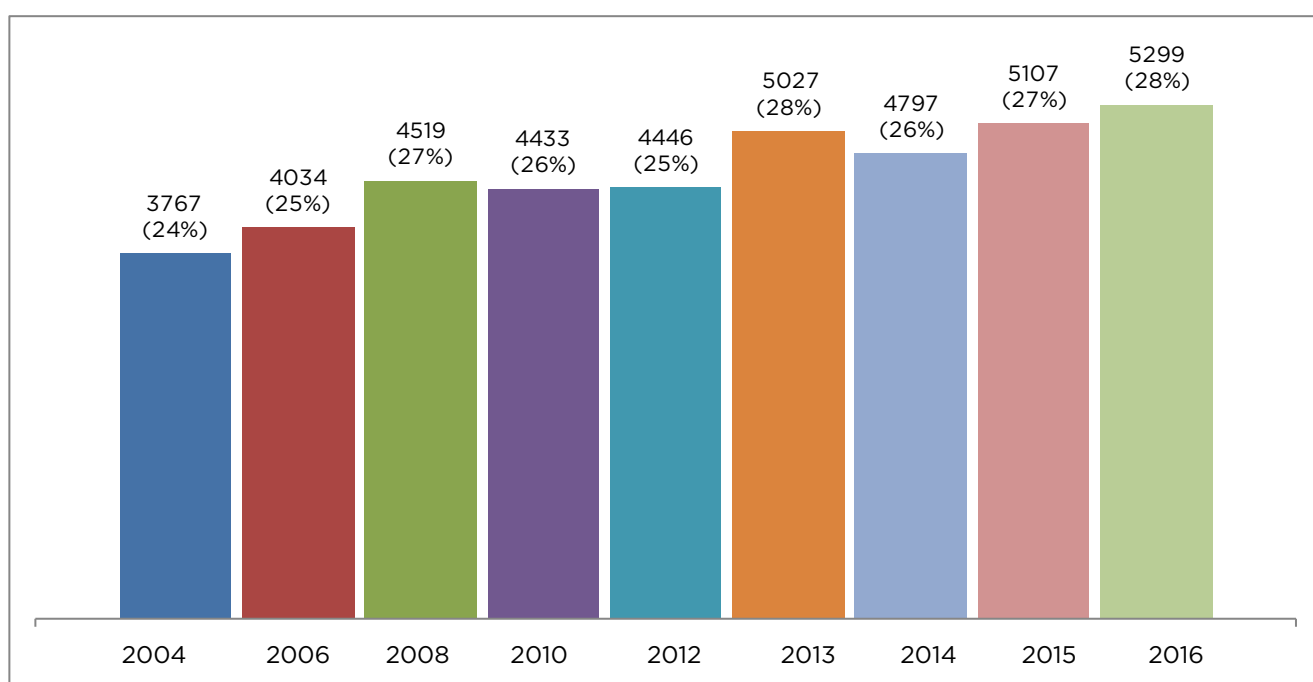
Trends

Community Radio Weekly Listening Trend

Since the previous surveys conducted in 2004, 2006 and 2008, the estimated number of Australians aged 15 years and over listening to community radio in an average week has risen from 3,767,000 in 2004 to 4,519,000 in 2008 followed by a statistically insignificant dip to 4,433,000 in 2010 and remaining consistent in 2012 with 4,446,000. After a significant increase in 2013 to 5,027,000, 2014 saw a slight decrease in the overall listenership to 4,797,000. Since the slight drop in 2014 listening has increase over the last two years to a new height of 5,299,000 listeners in 2016.

Fig 37. Community Radio Weekly Listening ('000)

Percentages are amongst all people aged 15+



Community Radio Weekly Listening by States Trend

Since the previous surveys conducted in 2004, the estimated number of people in NSW aged 15 years and over listening to community radio in an average week has risen from 1,119,000 in 2004 to 1,684,000 in 2016. VIC has seen an increase in the estimated number of listeners from 934,000 in 2010 to 1,358,000 in 2016.

Comparable results are shown below for each of the other states and territories.

NSW continues to be the state with the largest audience for community radio.

Fig 38. Trend: Population Listening to Community Radio in an Average Week - NSW; VIC; QLD
- by State and Year('000)

Percentages are amongst all people aged 15+

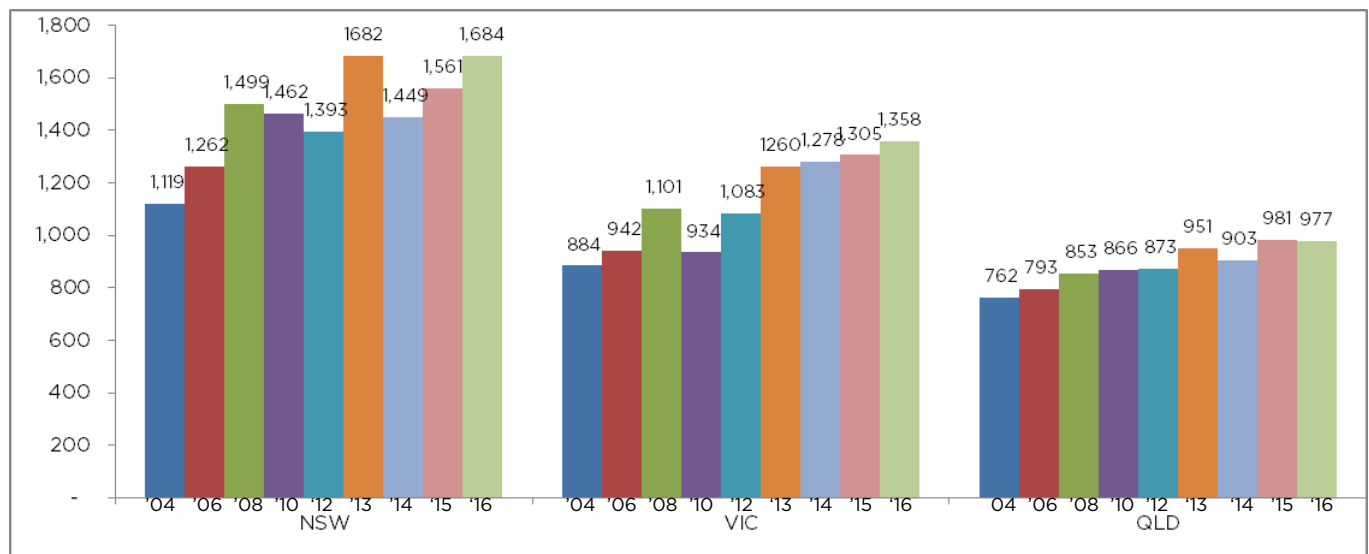
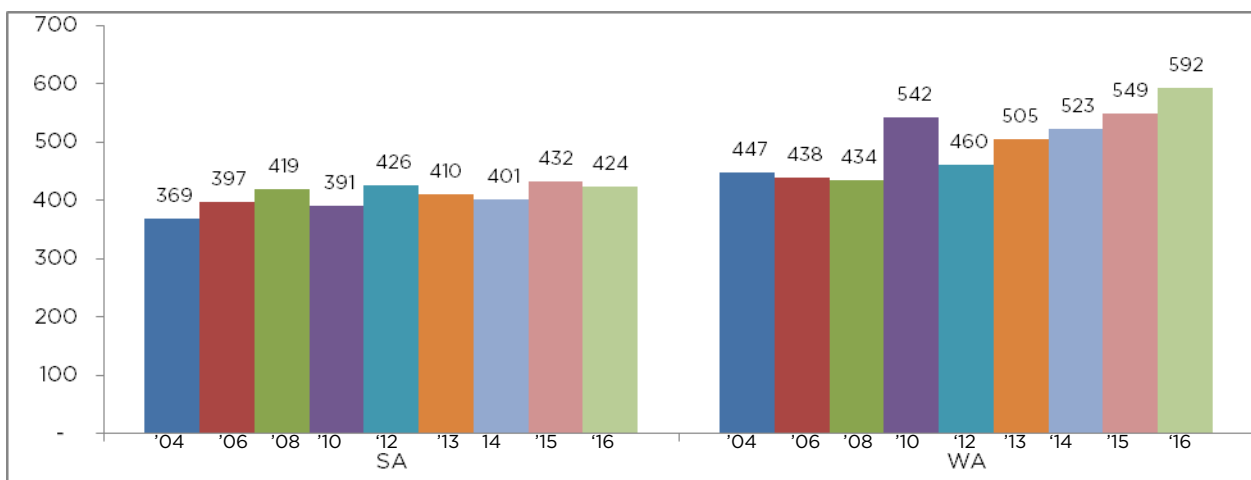


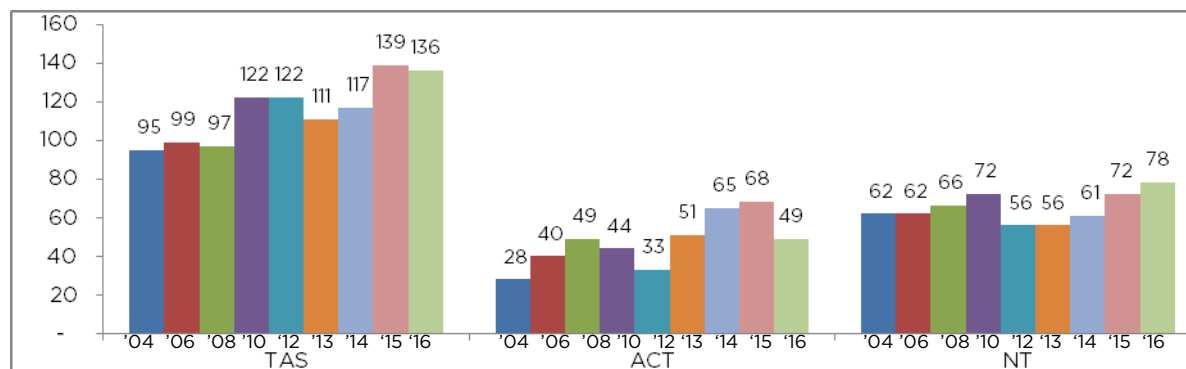
Fig 39. Trend: Population Listening to Community Radio in an Average Week -SA; WA
- by State and Year ('000)

Percentages are amongst all people aged 15+



**Fig 40. Trend: Population Listening to Community Radio in an Average Week - TAS; ACT; NT
- by State and Year('000)**

Percentages are amongst all people aged 15+

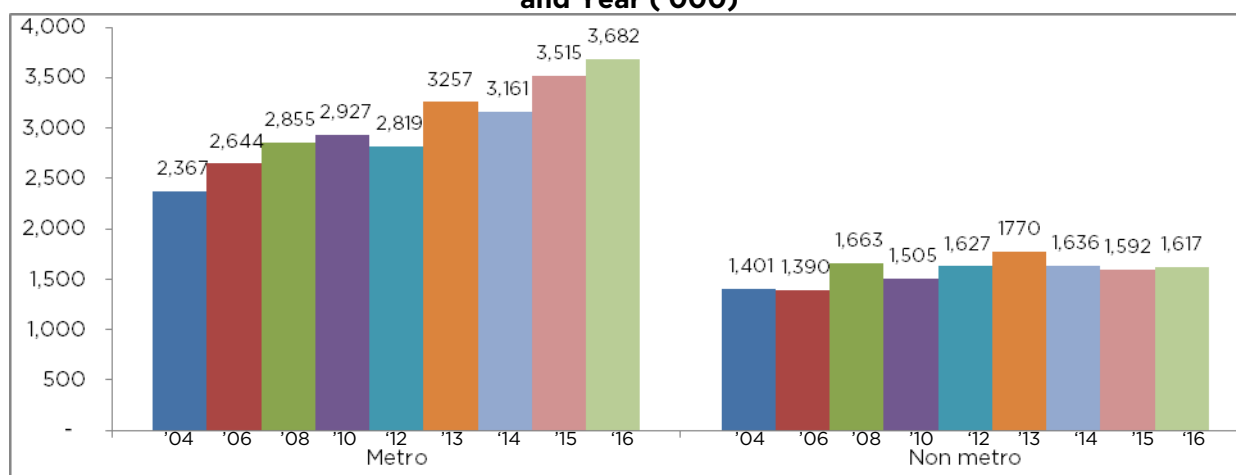


Community Radio Weekly Listening by Metro vs. Non-Metro Areas, Gender and Age Group Trends

Since the first survey in 2004, the estimated number of people in metropolitan areas (8 cities) aged 15 years and over listening to community radio in an average week, has risen from 2,367,000 in 2004 to 3,682,000 in 2016.

Comparable figures are shown below for people aged 15 years and over in non-metropolitan areas, men, women and various age groups.

Fig 41. Trend: Population Listening to Community Radio in an Average Week by Metro/Non-metro and Year ('000)



The next charts compares each year on key demographic criteria.

Fig 42. Trend: Population Listening to Community Radio in an Average Week by Gender ('000)

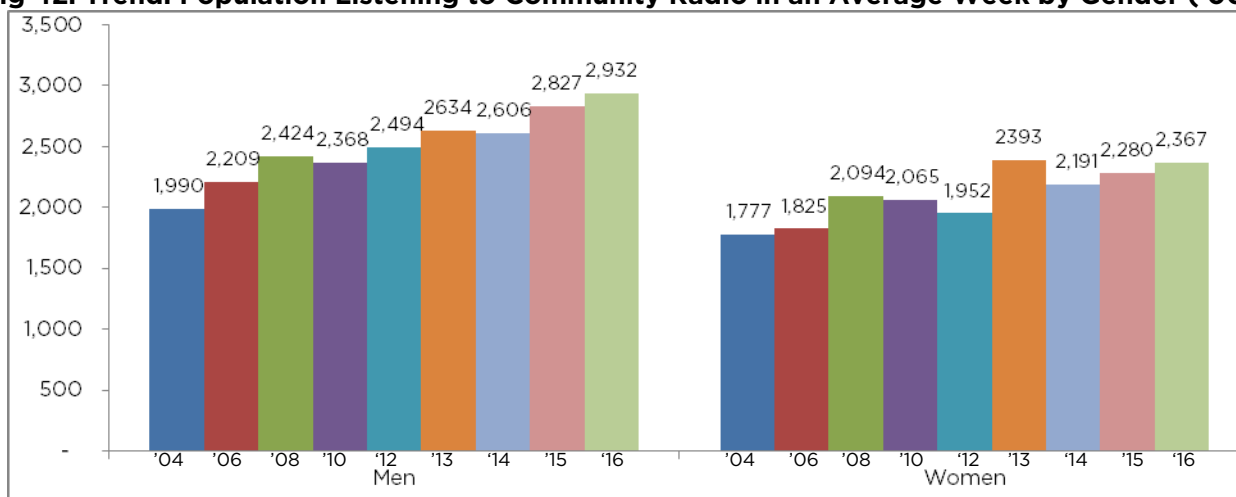


Fig 43a. Trend: Population Listening to Community Radio in an Average Week by Age Group ('000)

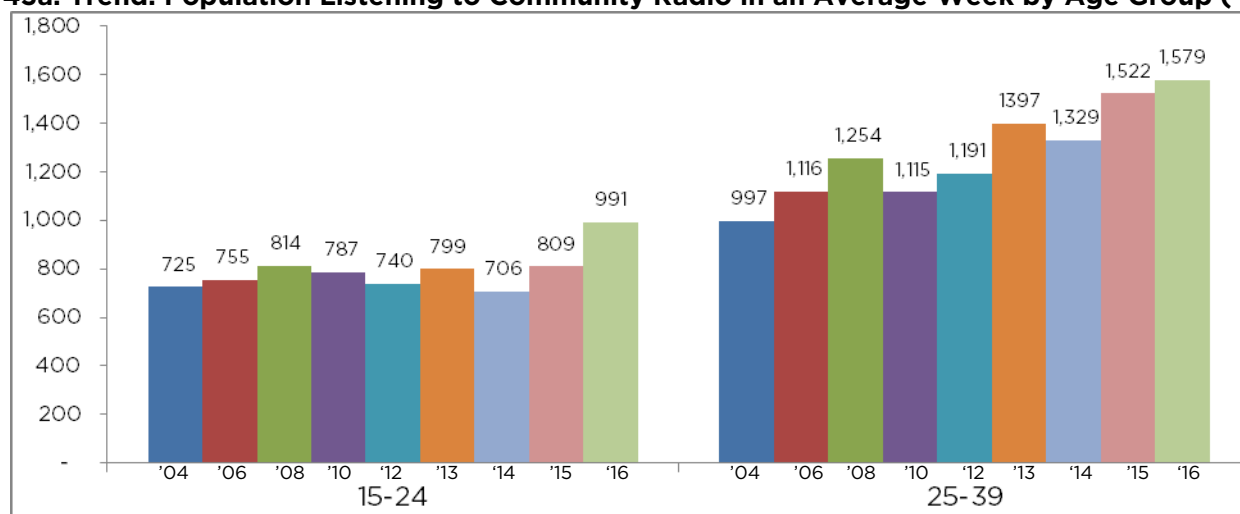
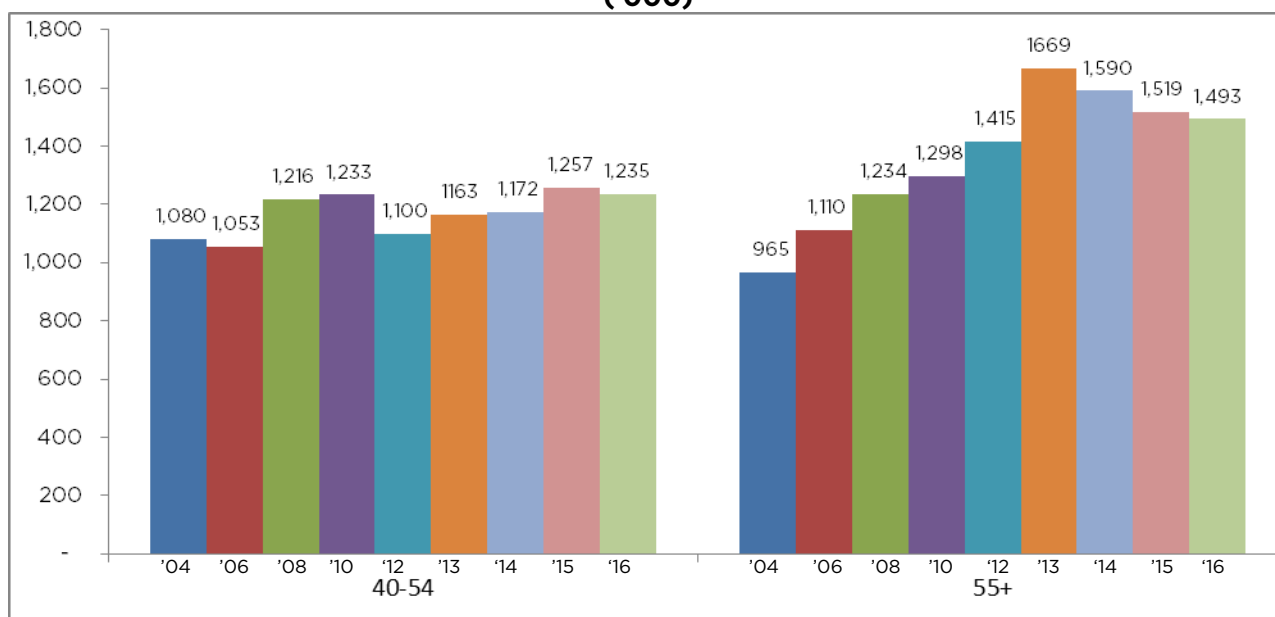


Fig 43b. Trend: Population Listening to Community Radio in an Average Week by Age Group ('000)



The segments which grew in population terms were: Females, 25-39 years and over 55s and metropolitan areas.

Area Fact Sheets

Further results by various geographic locations can be found in the Area Fact Sheets on the CBAA website.

<https://www.cbaa.org.au/broadcasters/get-data-national-listener-survey-station-census/national-listener-survey-fact-sheets>