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Community Radio National Listener Survey 2019

Summary Report of Findings
Community Broadcasting Association of
Australia

February 2020

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1. 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.

About 5.8 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
- LGBTQI+ 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.



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1.1 McNair 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	2017	2018	2019
All radio	83%	86%	84%	83%	86%	84%	84%	83%	83%	82%	84%	84%
Community radio	24%	25%	27%	26%	25%	28%	26%	27%	28%	27%	30%	29%

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.

1.2 McNair yellowSquares

McNair yellowSquares has been commissioned to conduct each of the National Listener Surveys to date. McNair yellowSquares 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 Angela Brooks, Managing Director and Christian Geilen, Manager - Consulting and Research Design.



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2. Executive Summary

2.1 Awareness of Community Radio

Overall, more three quarters (77%) 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 72%.

77% of Australians aged 15 years+ are aware of community radio

2.2 How Many People Listen to Community Radio

- Overall, 84% of Australians aged 15 years and over listen to some radio in the course of a typical week.
- Nearly a third (29%) of Australians aged 15 years and over, or 5,788,000 people, listen to community radio in 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 5,788,000 in 2019, with some statistically insignificant fluctuations from-year-to-year.
- The apparent growth in overall radio audiences is largely accounted for in overall population growth in Australia. Overall radio listening as a proportion of the population is largely unchanged, at 84% of the adult population.
- Of community radio listeners surveyed, 16% listen to community radio exclusively.
- Amongst the broader Australian population aged 15 years and over, 5% (or 918,000 people) listen exclusively 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 4,032,000 people by the end of 2019 – again with some small fluctuations from year-to-year.

- 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 40% 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 17% on average per week.
- Metropolitan and non-metropolitan areas have levels of listening, at 30% and 27% respectively. Based on total audience size, the metropolitan areas account for just over two-thirds of all community radio listeners.

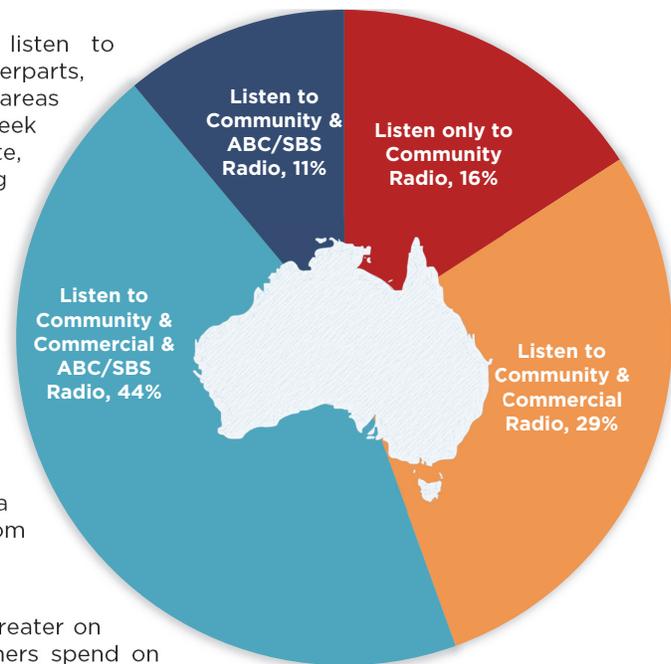
2.3 How Much They Listen and When

- Listeners typically listen to 14.7 hours of community radio per week. People aged 25-39 years are the heaviest listeners to community radio, averaging 16.4 hours per week. They are followed by people aged 15-24 years with an average of 15.6 hours per week, while people aged 40-54 years typically listen for 13.6 hours per week, and those aged 55 and over, 13.2 hours per week.

Listeners typically listen to 14.7 hours of community radio per week

- People who regularly tune in to community radio have a portfolio of radio listening, with 44% listening to a mix of community radio, commercial radio and ABC/SBS Radio, 29% listening to both community radio and commercial radio but not ABC/SBS radio, 11% listening to both community radio and ABC/SBS radio but not commercial radio and 16% 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 15.8 hours compared to 12.1 hours per week for non-metropolitan areas. Comparing state-by-state, New South Wales has the highest level of listening time at 15.8 hours per week. Western Australia, Victoria, and South Australia also have high levels of listening per week, averaging 15.2 hours, 14.8 hours and 14.2 hours per week respectively. The Northern Territory, Queensland, Tasmania and ACT have the least listening time, averaging 13.8, 13.3, 11.9 and 8.7 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 area.



- As with all radio, listening to community radio is greater on weekdays than weekends. Community radio listeners spend on average 2.3 hours per day listening to community radio on an average weekday, compared to 1.8 hours on an average Saturday, and 1.6 hours on a typical Sunday.
- In 2017 a set of new questions was introduced to the survey to understand where and also how community radio listeners consume community radio.
- Typically, a weekly community radio listener from one of the five metropolitan capital cities spends 50% (7.4h) of their time listening to community radio in the car, 30% (4.4h) is spent at home and 9% (1.4h) at work. Public transport accounts for 4% (0.5h), elsewhere accounts for 4% (0.5h) and walking or exercising 3% (0.5h).
- Overall, the main way people listen to community radio is by AM/FM radio with almost 67% of community radio listeners using this method to access community radio programmes. This equates to about 9.8 hours per week.

- While the survey results indicated that 26% of community radio listeners access community stations using a Digital DAB+ radio, 5% have adopted DAB+ as their main way of listening to community radio – and consideration of these results should bear in mind that there are indications that some people may be confusing other forms of radio receivers with Digital Radio (despite the clear explanation given in the survey).
- People listening at home (61%) and in the car (80%) are more likely to listen via AM/FM signal. This accounts for 2.7 hours and 5.9 hours of listening respectively in a typical week. In contrast, around 48% of people that listened to community radio at work listen via AM/FM (0.7 hours) and 21% listening to community radio at work are streaming live radio (0.3 hours) of total time spent listening in a typical week.

Mid-morning and breakfast are when people listen most often

- Community radio shares some listening patterns with commercial and public radio, with peak listening during mid-morning (9am-noon) and breakfast (5am-9am) with 67% of the weekly audience listening to each day part. This is followed by drive time (3pm-7pm) with 62% of the weekly audience listening in the early evening. Over half of the audience (57%) listen during the afternoon session (noon-3pm) and just over one third (39%) during the later evening (7pm-midnight). Almost than one in four (24%) listen during overnight broadcasts (midnight-5am).
- Both men and women are more likely to listen to community radio during breakfast. People aged 15-24, 25-39 and 40-54 years are more likely to listen during breakfast and drive time, while those aged 55 years and over are more likely to listen in the mid-morning. People who live in metropolitan are more likely to listen to community radio during breakfast and drive, while people in regional areas are more likely to listen during breakfast and mid-morning.

2.4 Why They Listen

- The key reason that survey respondents gave for listening to community radio was that stations have “*local information/local news*” (52%). This explanation prevails irrespective of the listener’s 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 “*Local voices /Local personalities*” and “*specialist music programs*” (36% each).



- Listeners aged 55+ years emphasised that “*specialist music*” is a key reason for listening to community radio (43%).
- For non-metropolitan listeners, “*local information/local news*” is consistently the most cited reason (65%), 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*” (46%), “*specialist music programs*” (38%) and “*local voices/local personalities*” (33%).
- Whilst “*local voice / local personalities*” 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 “*local information/local news*”, “*local voices/local personalities*”, “*specialist music*” and “*programs not available elsewhere/I hear something that I don’t hear anywhere else*”.

- 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 45% finding it very valuable and 50% quite valuable. Overall women, people aged 55+ 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

2.5 Who Listens

- Community radio draws its audience from a wide cross section of the community with a reach of at least 25% of most demographic groups tuning in to community radio during a typical week.
- One in three (33%) of full-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.
- Four out of ten of people who identify as Aboriginal or Torres Strait Islander (43%) listen to community radio during a typical week.
- Almost four in ten people (38%) who have a reading difficulty listen to community radio during a typical week.
- The community radio listeners profile reveals that 56% of the audience is comprised of men and 44% women.
- Almost one in five of community radio listeners (16%) are aged 15-24 years, 31% aged 25-39 years, 24% aged 40-54 years and 29% are aged 55 years or over.
- Four in ten community radio listeners (41%) are engaged in full-time work and 22% 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.



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3. Method

This research was conducted by means of a mixed-mode method survey, including online, computer-assisted telephone interviewing (CATI), and face-to-face intercept interviews using tablet computers (or computer assisted personal interviews, CAPI). These methods are used in tandem to ensure that there is a representative sample that matches the population profile in each metropolitan and regional area of Australia. The online (computer-assisted web interviewing, or CAWI), draws on panel membership across the population, while the CATI telephone interviewing focusses on supplementing areas with lower online presence, and the face-to-face interviewing is particularly important in ensuring the inclusion of young respondents – who are less likely to respond to either telephone or online surveys. The 2004, 2006, 2008 and 2010 waves of research were conducted entirely by means of telephone surveys.

In the 2019 report, the total sample across Australia consisted of (2 waves): 14,727 (1,697 telephone / 12,789 online / 241 face-to-face). The research method was altered in 2012 to address the declining penetration and usage of landlines and to therefore incorporate mobile phone only households. Hence, since 2012, the research was conducted using the *mixed-mode 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 calls seriously 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 mixed-mode method was adopted – providing a fully integrated multi-method survey. The term ‘mixed-mode’ reflects the dynamics of the design: the method does not comprise 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 all 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 and face-to-face surveys 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.



3.1 Telephone Survey

The telephone component of this survey was conducted by trained interviewers from McNair yellowSquares' supervised call centre in Crows Nest, Sydney. The interviewing team comprised trained interviewers accredited under the international standard 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 as specified by ISO 20252.

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 (AMSRS), McNair yellowSquares also offered the AMSRS Research Company Directory as an external verification source as to the company's credibility. The McNair yellowSquares website was also offered for information about the company's privacy policy.

3.2 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.

3.3 Face-to-Face Street Intercept Survey

The face-to-face survey was conducted in Sydney, Melbourne, Brisbane and Adelaide.

The interviewing was conducted by means of a Computer Assisted Personal Interviewing (CAPI) system. Interviewers approached members of the public who appeared to be between 18 and 30 years of age.

The CAPI 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 and postcard with confidentiality information was provided to respondents who wished to check the veracity of the interview.



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3.4 Survey Dates and Sample Size

The interviewing program in the five capital cities and the Gold Coast was conducted in May and October 2019 and the regional areas were conducted in May/June 2018 and May 2019, 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 14,727 interviews were conducted as follows:

Sydney	NSW	2,175	Perth	WA	2,048
Regional NSW	NSW	698	Regional WA	WA	324
Melbourne	VIC	2,076	Darwin	NT	324
Regional VIC	VIC	428	Regional NT	NT	75
Brisbane	QLD	2,050	Hobart	TAS	322
Regional QLD	QLD	1,143	Regional TAS	TAS	231
Adelaide	SA	2,074	ACT / Canberra	ACT	314
Regional SA	SA	313			
			Total		14,727

Additional surveys were conducted in Newcastle and the Sunshine Coast in the May 2018 & May 2019 wave. These booster surveys do not affect the overall results, as the results are weighted to the population by area, age and gender – but add granularity in areas where results are needed for specific stations in regional areas.

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, ABC/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.



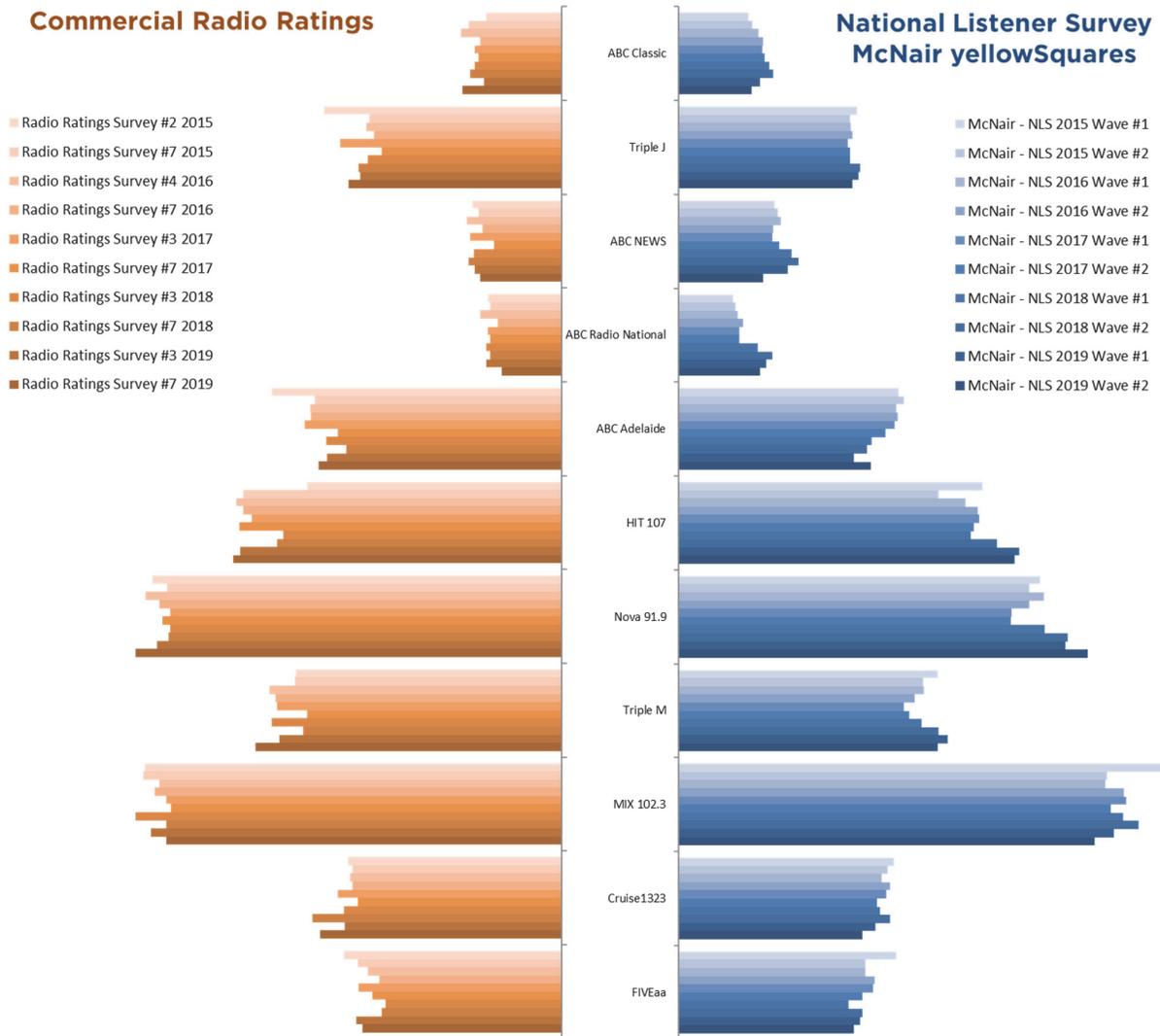
3.5 Comparison with Commercial Radio Rating Surveys

Traditionally, radio audiences have been measured in Australia through the use of a diary (hard copy or online) that has provision for a respondent to tick quarter-hour by quarter-hour and day-by-day the radio stations that he/she listens to over a seven-day period. It is not possible for the diary to list all of the radio stations that are in each market, therefore, the diary lists only the commercial and ABC stations that are in the market. By and large, these stations are the ones that subscribe to the results.

If a respondent listens to a non-listed station, he/she has to tick the quarter-hour(s) under either of two headings - "other AM" or "other FM". It can be fairly said that because community radio stations are not listed in the diary, listening to community radio is under-reported in the GfK/Nielsen surveys.

The present survey has been structured so that the call-signs and positions on the dial of all community, commercial and ABC/SBS radio stations in a market are read out to respondents or displayed on the screen.

By comparison, the graph below, compares the commercial stations results of the National Listener Survey with the nearest comparable commercial radio rating surveys overtime in Adelaide. Note that the surveys are substantially different in method, sample size and the age of participants. Nevertheless, despite these differences, the surveys clearly achieve very consistent results, thereby validating the accuracy of both measures.



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4. Results

4.1 Overall Awareness of Community Radio

77% of Australians aged 15 years and over reported that they are 'aware' of community radio. This is higher than in 2010 and 2012, when 70% and 73% respectively 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 a little lower – 72%, 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

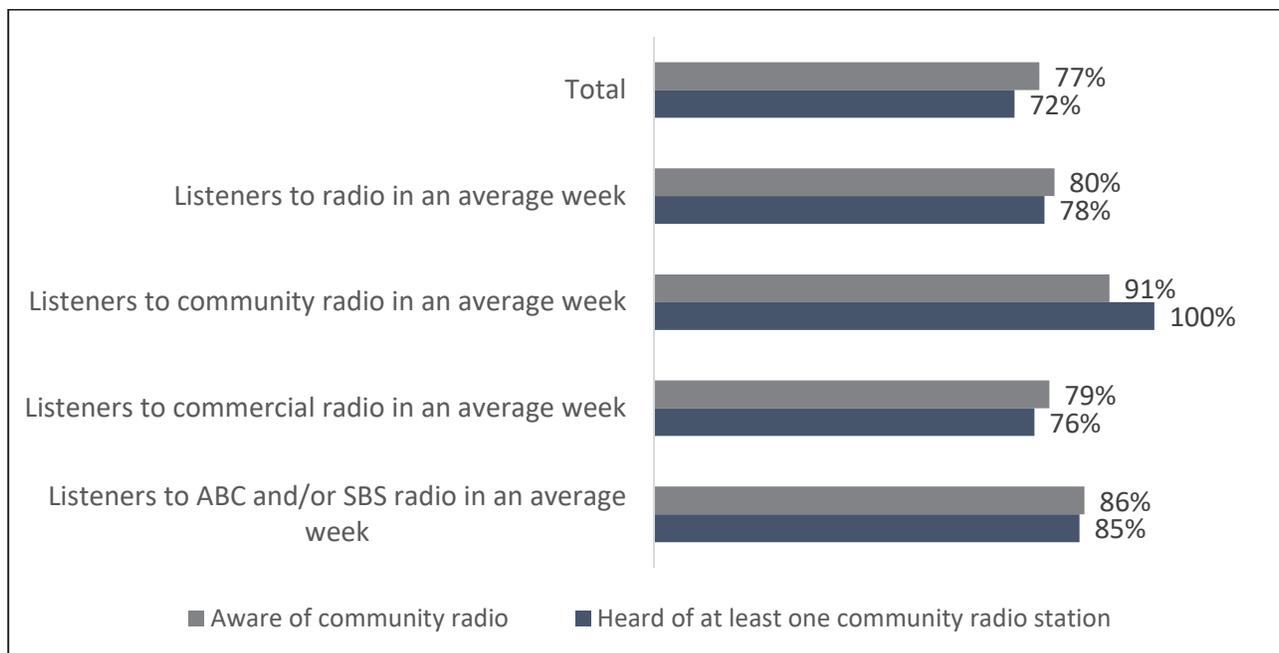


Fig 1b. Community Radio Awareness – Australia – Trend

Percentages are of the total population; na = not asked

Australian Population 15+	2008	2010	2012	2013	2014	2015	2016	2017	2018	2019
'Aware' of community radio	71%	70%	73%	74%	72%	72%	72%	72%	77%	77%
'Heard of' at least one community radio station	na	na	75%	69%	69%	69%	70%	70%	72%	72%

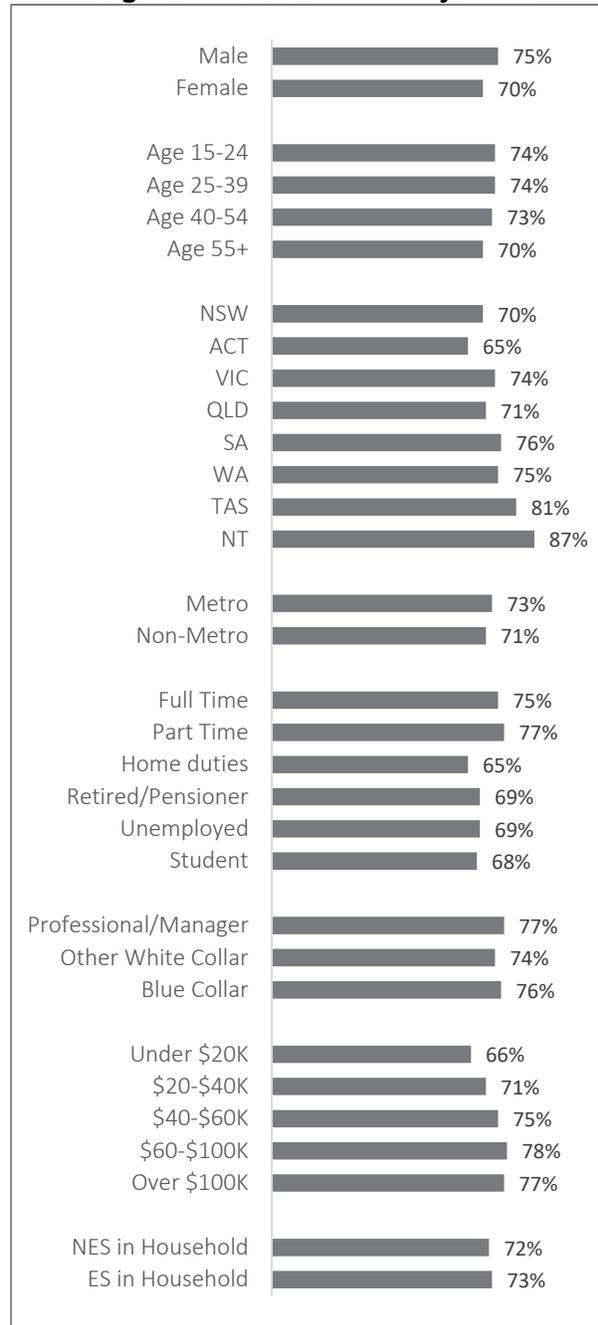
4.2 Community Radio Awareness by Demographic Groups

Awareness of community radio varies considerably by demographic groups, from a high of 85% of people aged 55 years and over, to a low of 63% amongst people aged 15-24 years (Fig 2). Similarly, the percentage of people who have 'heard' of at least one community radio station varies by demographic group, as shown below (Fig 3).

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



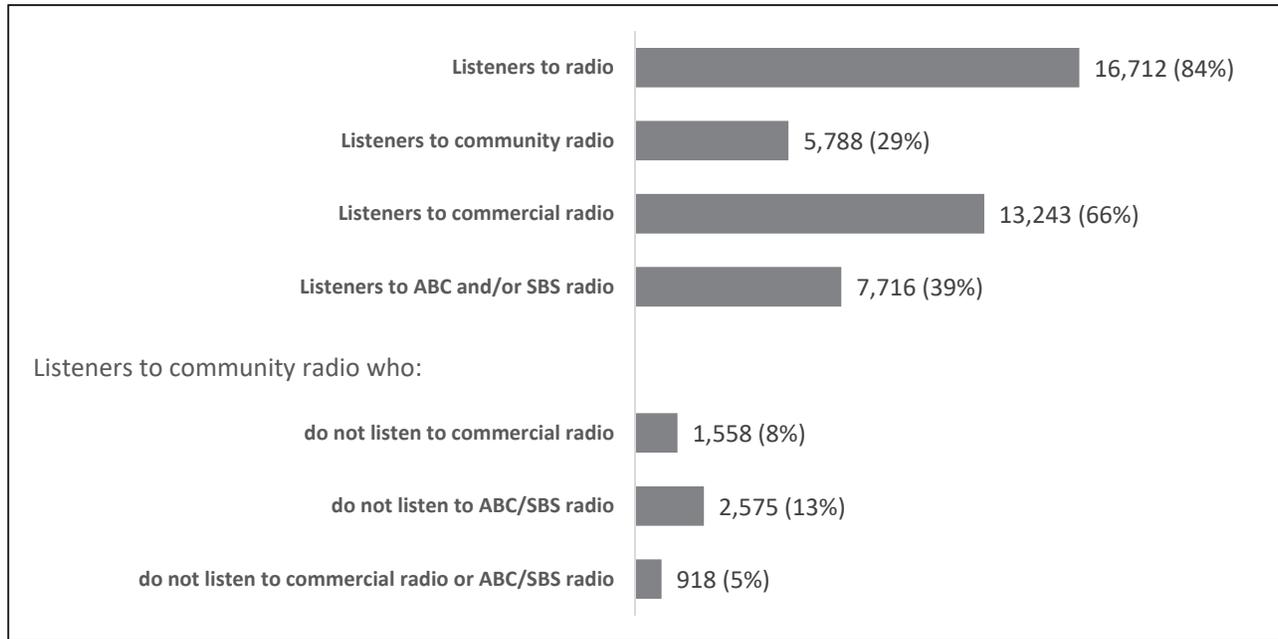
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4.3 Overall Radio Listening - Australia

- 16,712,000 people aged 15 years and over, or 84% of Australia’s population of 19,958,000 people aged 15 years and over, listen to radio in an average week. Amongst these, 5,788,000 people aged 15 years and over (29%) listen to community radio in an average week. 66% listen to commercial radio and 39% listen to ABC and/or SBS radio in an average week. See Fig 4 below.

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

Percentages are of the total population



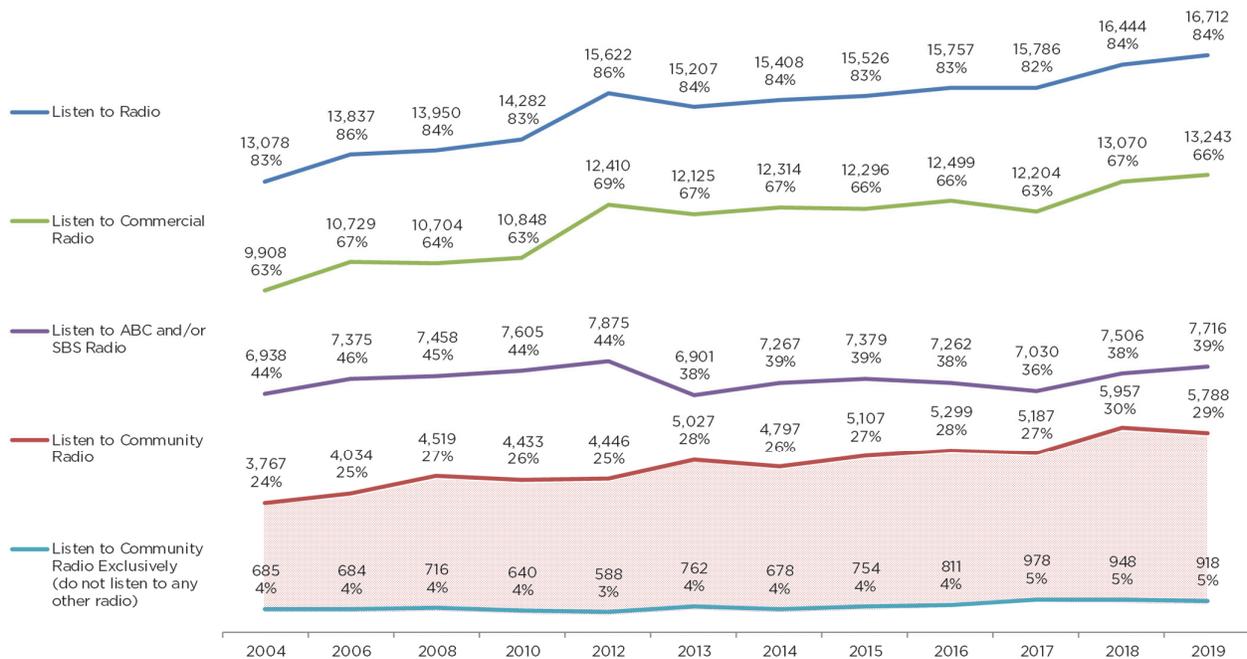
- In an average week, of all people aged 15 years and over throughout Australia (19,958,000 people):
 - 1,558,000 people, or 8%, listen to community radio but not commercial radio;
 - 2,575,000 people, or 13%, listen to community radio but not ABC/SBS radio; and
 - 918,000 people, or 5%, listen to community 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 can be accessed via [the CBAA website](#).

4.4 Overall Radio Listening - Australia - Trend Overtime

The graph below (Fig 5) shows the overall radio listening trend, as well as the trend for community, commercial, ABC/SBS and exclusive community radio listeners in an average week.

The figures show that overall radio listening in terms of raw population numbers has increased from 13,078,000 people aged 15 years and over in 2004 to 16,712,000 people aged 15 years and over in 2019 - this is an increase of just over 3.6 million people in 15 years. Taking into account population growth, the proportion of listening to radio in the past week of the population aged 15 years and over has increased slightly. ABC/SBS, Commercial and community radio listenership as percentage listenership amongst the population aged 15 and over has been relatively stable over the last few years.

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



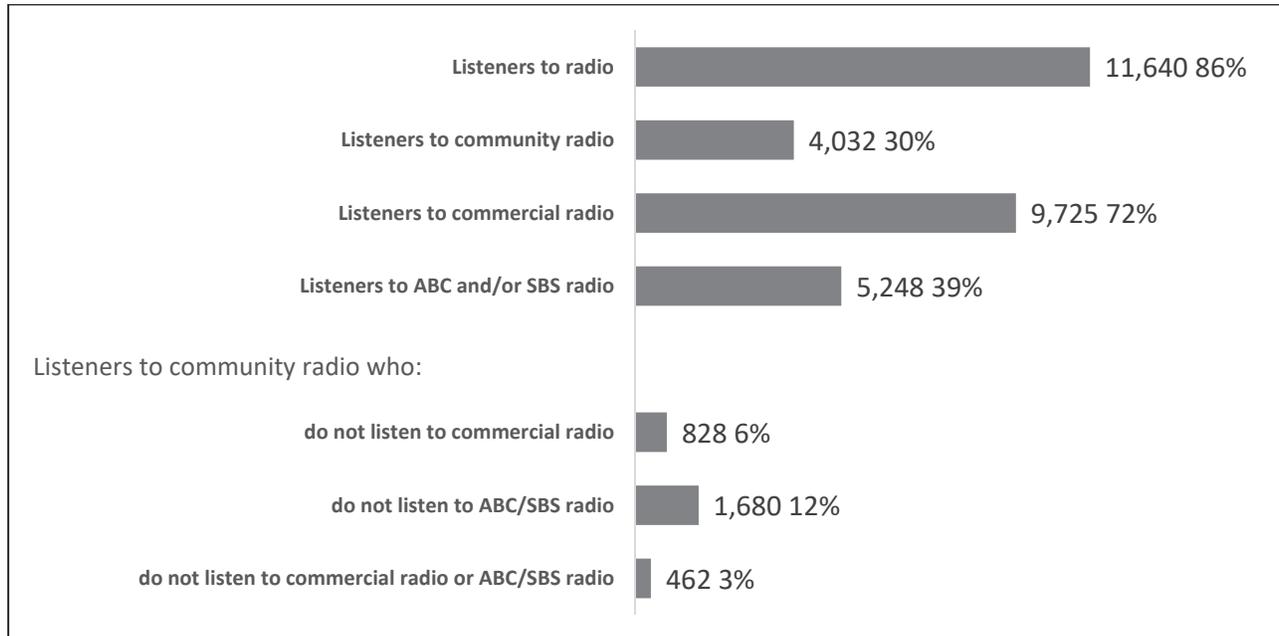
Please note between 2004 and 2010 the commercial and ABC/SBS Radio measure was derived by means of two single questions asking if they have listened to a commercial and ABC/SBS radio in the past week. Since 2012 each commercial and ABC/SBS radio station in each market is listed, in the same way as the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

4.5 Overall Radio Listening - National Metropolitan (Eight Capital Cities)

- 11,640,000 people aged 15 years and over, or 86% of Australia's national metropolitan population (eight capital cities) of 13,519,000 people aged 15 years and over, listen to radio in an average week. 30% or 4,032,000, of these people listen to community radio in an average week. 72% listen to commercial radio and 39% listen to ABC and/or SBS radio in an average week (Fig 6).

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

Percentages are of the total metropolitan population

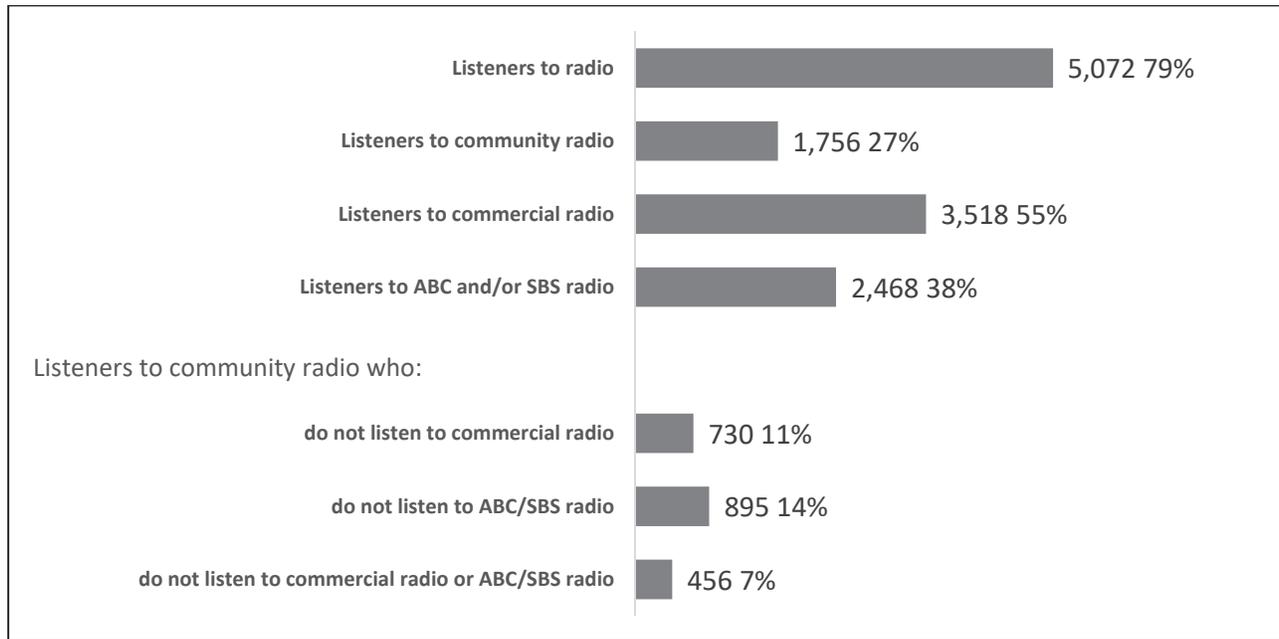


- In an average week, of all people aged 15 years and over throughout Australia's national metropolitan areas (13,519,000 people):
 - 828,000 people, or 6%, listen to community radio but not commercial radio;
 - 1,680,000 people, or 12%, listen to community radio but not ABC/SBS radio; and
 - 462,000 people, or 3%, 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 can be accessed via [the CBAA website](#).

4.6 Overall Radio Listening – National Non-Metropolitan

- 5,072,000 people aged 15 years and over, or 79% of Australia’s national non-metropolitan population (Australia minus eight cities) of 6,439,000 people aged 15 years and over, listen to radio in an average week. 1,756,000 people aged 15 years and over (27%) listen to community radio in an average week. 55% listen to commercial radio and 38% 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

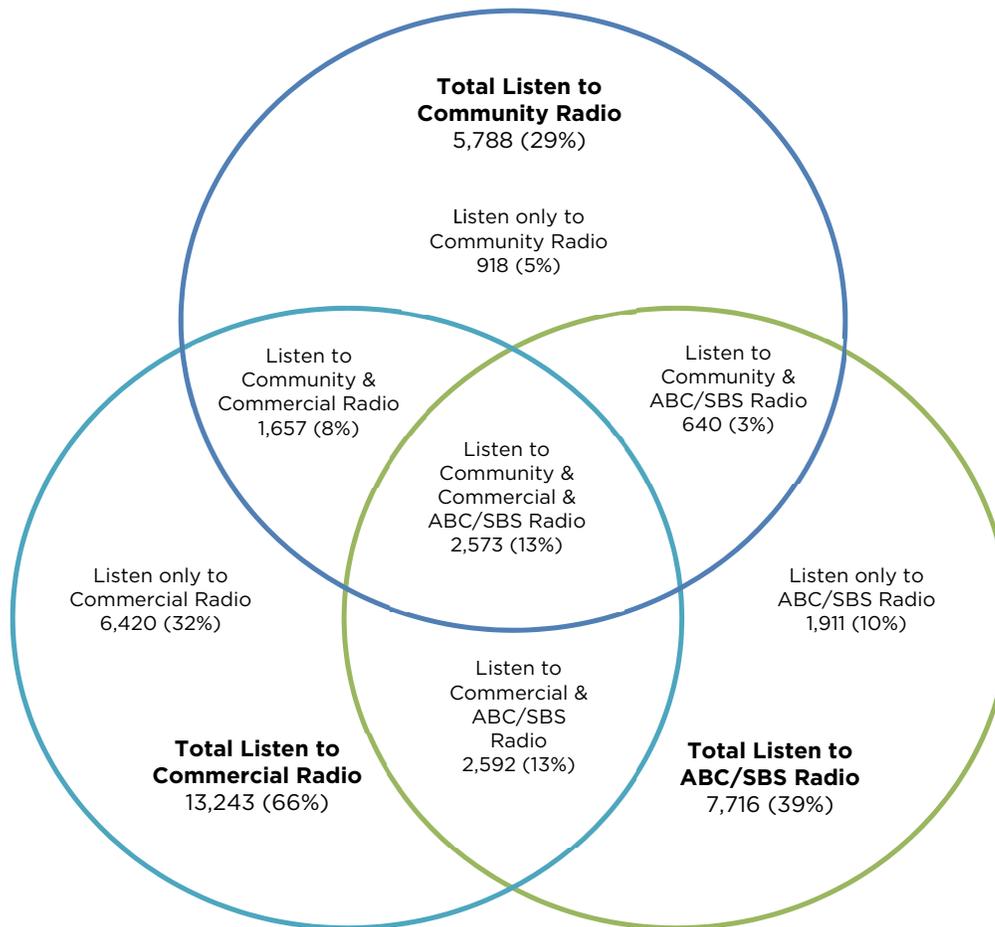


- In an average week, of all people aged 15 years and over throughout Australia’s non-metropolitan areas (6,439,000 people):
 - 730,000 people, or 11%, listen to community radio but not commercial radio;
 - 895,000 people, or 14%, listen to community radio but not ABC/SBS radio; and
 - 456,000 people, or 7%, 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 can be accessed [via the CBAA website](#).

4.7 Overlapping Weekly Radio Audiences – Australia

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

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



The circles above (Fig 8) (not to scale) diagrammatically depict how radio audiences overlap for Australians aged 15 years and over. The top circle depicts Australia's 5,788,000 community radio listeners aged 15 years and over in an average week, and shows how these consist of:

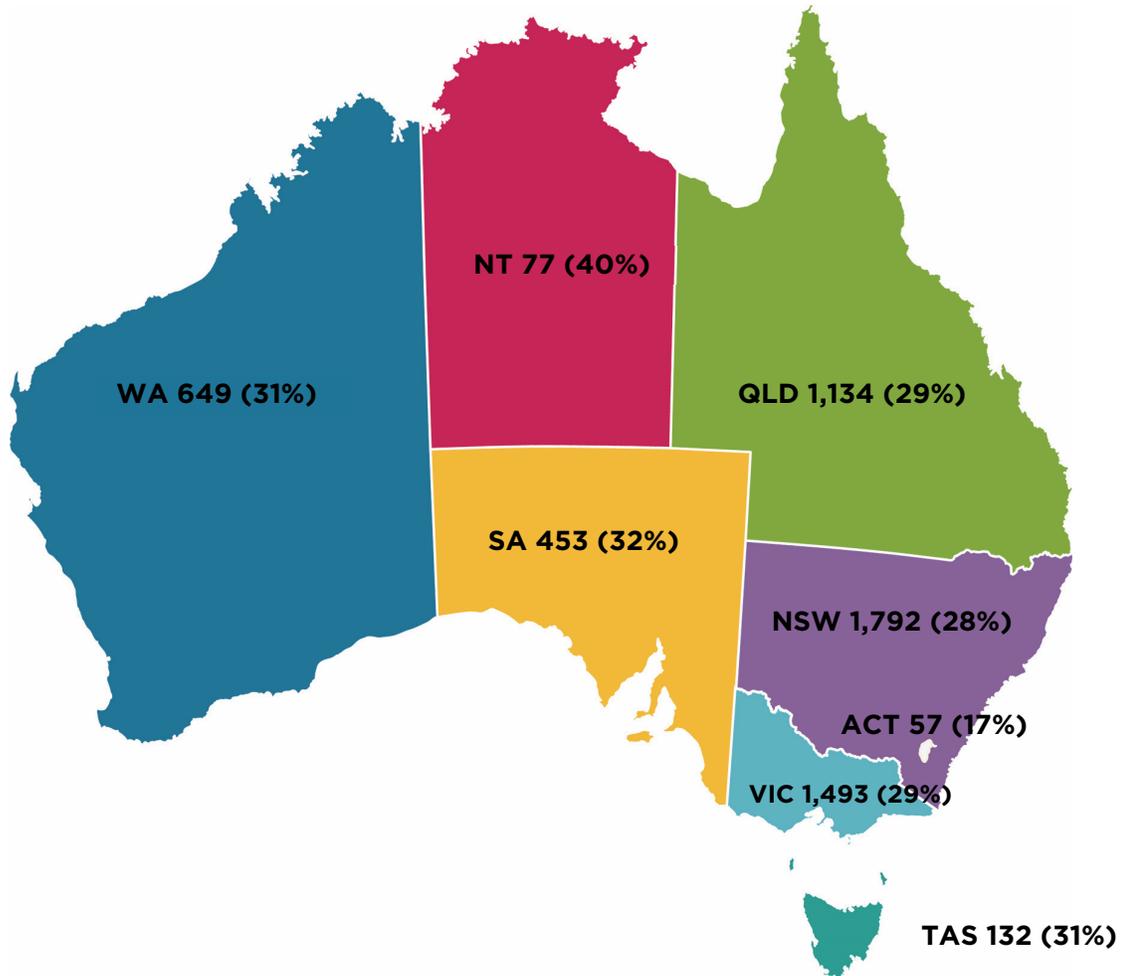
- 1,657,000 people who listen to community radio and commercial radio but not ABC/SBS radio (8%);
- 640,000 people who listen to community radio and ABC/SBS radio but not commercial radio (3%);
- 2,573,000 people who listen to community radio, commercial radio and ABC/SBS radio (13%); and
- 918,000 people who listen to community radio exclusively, that is, listen to community radio but not commercial radio or ABC/SBS radio (5%).

The left-hand circle depicts Australia's 13,243,000 commercial radio listeners aged 15 years and over in an average week, and the right-hand circle depicts Australia's 7,716,000 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.

4.8 Listeners to Community Radio by State

Australia's 5,788,000 community radio listeners aged 15 years and over are shown by state below (Fig 9). The proportion listening to community radio in an average week varies considerably by state from a high of 40% of the population aged 15 years and over in the NT to a low of 17% in the ACT.

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



4.9 Exclusive Community Radio Listeners by State

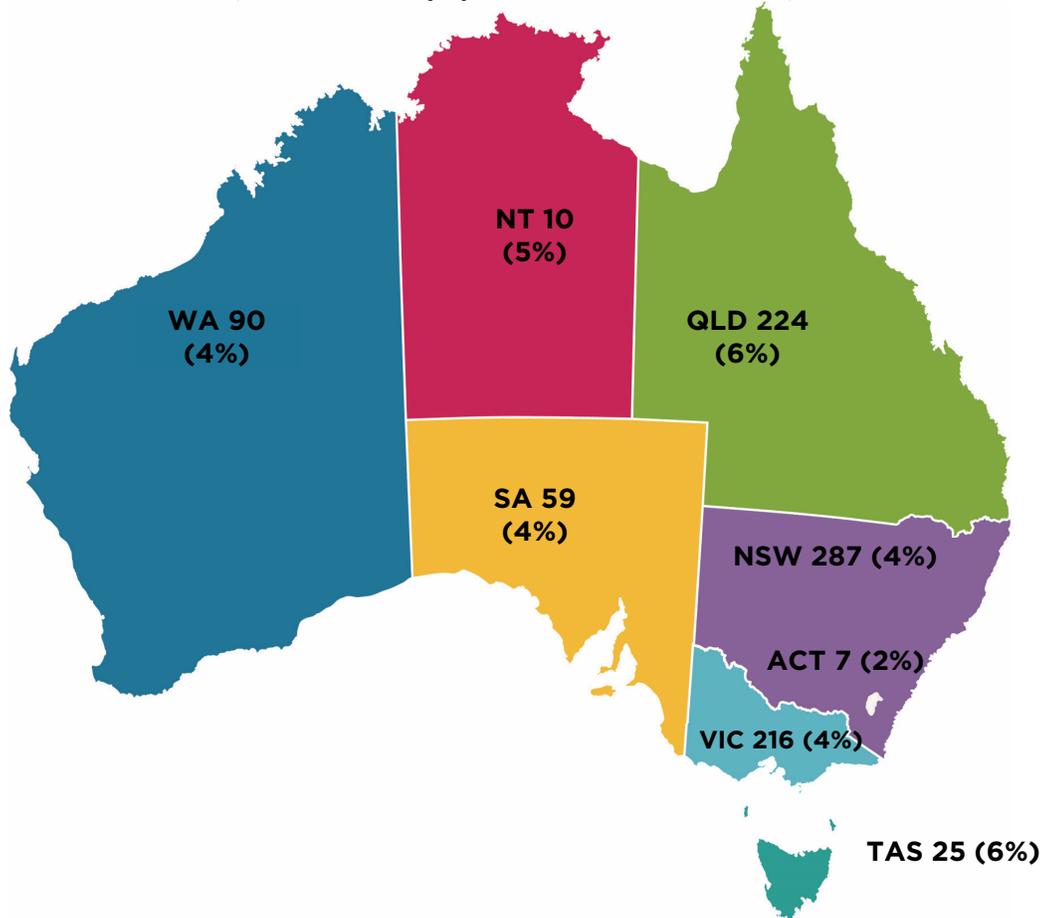
The 918,000 people aged 15 years and over who listen to community radio exclusively in an average week are shown below by state (Fig 10). These people listen to community radio but not commercial radio or ABC/SBS radio.

Queensland and Tasmania has the highest level of exclusive community radio listeners as a proportion of the whole population, with 6% 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 5% 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 New South Wales exclusive listeners account for 31% of Australia's 918,000 exclusive community radio listeners aged 15 years and over in an average week. Queensland and Victoria contribute 24% and 23% respectively of all exclusive community radio listeners.

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



4.10 Listeners to Community Radio by Metro versus Non-Metro

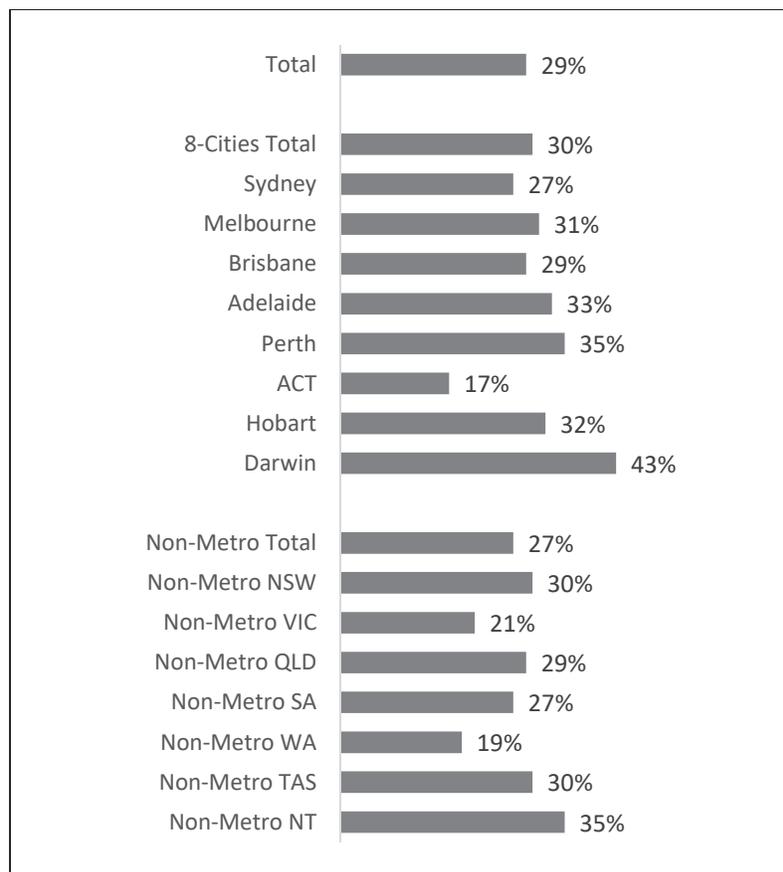
Across Australia, the proportion of residents aged 15 years and over in metropolitan and non-metropolitan areas who listen to community radio in an average week is 29% and 27% respectively (Fig 11). The biggest variations between cities and regional areas occur in WA where city residents are more likely to listen to community radio, than regional residents and in NSW it's the opposite, where regional residents 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 43% of its residents aged 15 years and over having listened to community radio in the last week. This is more than the average for the non-metropolitan area of the NT, which has a community radio listening audience of 35%.

At the other end of the spectrum, non-metropolitan WA has one of the lowest proportions of community radio listeners aged 15+, with 19% having listened in the last week. Of the capital cities, Canberra has the lowest level of listenership, with almost 17% 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, over 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



4.11 Listeners to Community Radio by Demographic Group

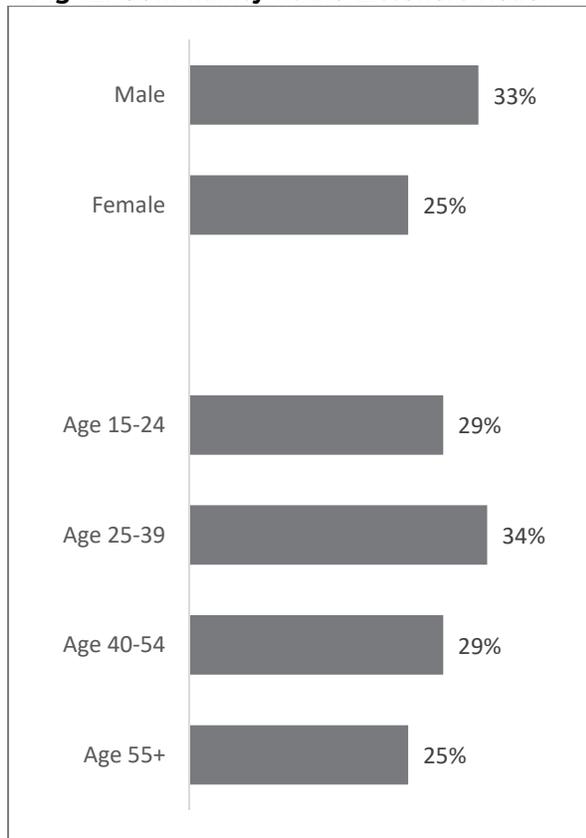
4.11.1 Gender

A third of all Australian men aged 15 years and over listen to community radio in an average week (Fig 12). Women are slightly less likely than men to listen to community radio, with just 1 in 4 of all women aged 15 years and over listening to community radio in an average week.

4.11.2 Age

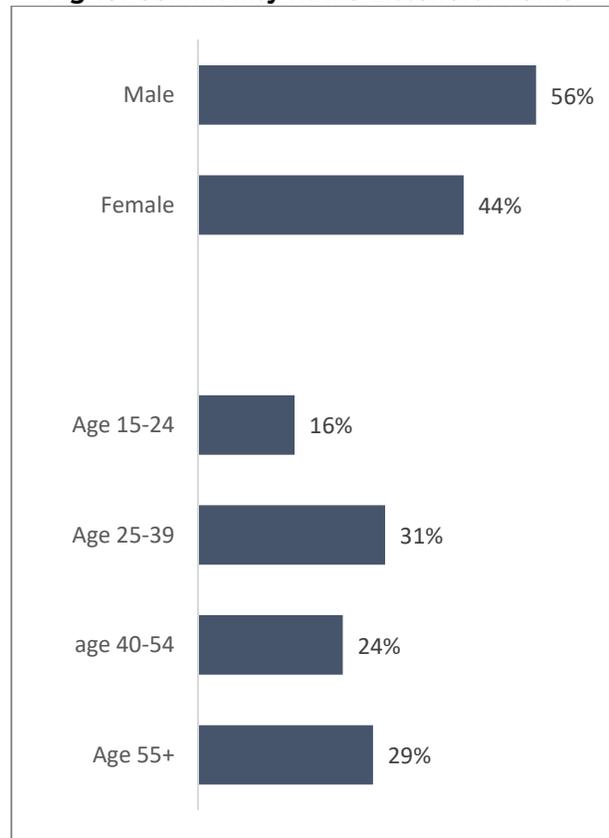
At least one quarter of all people in each age group listen to community radio in a typical week. The breakdown by age group is as follows: people aged 25-39 years have the greatest proportion of listeners (34%), followed by people aged 15-24 years and those aged 40-54 (29%), and then people aged 55+ years (25%).

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, 33% of all men aged 15+ listen to community radio in an average week.

Profile: As a proportion of all community radio listeners, the percent from each group/sub-group. For example, men aged 15 years and over account for 56% 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 (Fig 13), 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 16% of listeners. The other three age groups each contribute about one-quarter of listeners, with people aged 25-39 accounting for 31%, people aged 40-54 24% and people 55 years and over 29% of weekly listeners.

4.11.3 Employment Status

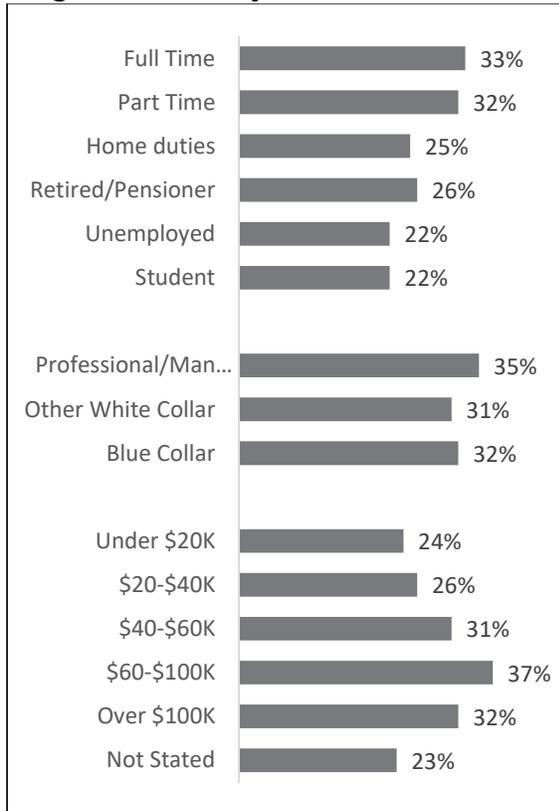
A third of all full-time workers and part-time workers listen to community radio in a typical week (Fig 14). Students, pensioners, people who are doing home duties and unemployed people are less likely to listen to community radio, with almost 1 in 4 tuning in over a typical week.

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

Community radio listening is marginally more likely among people whose gross income is between \$60,000 - \$100,000 per year.

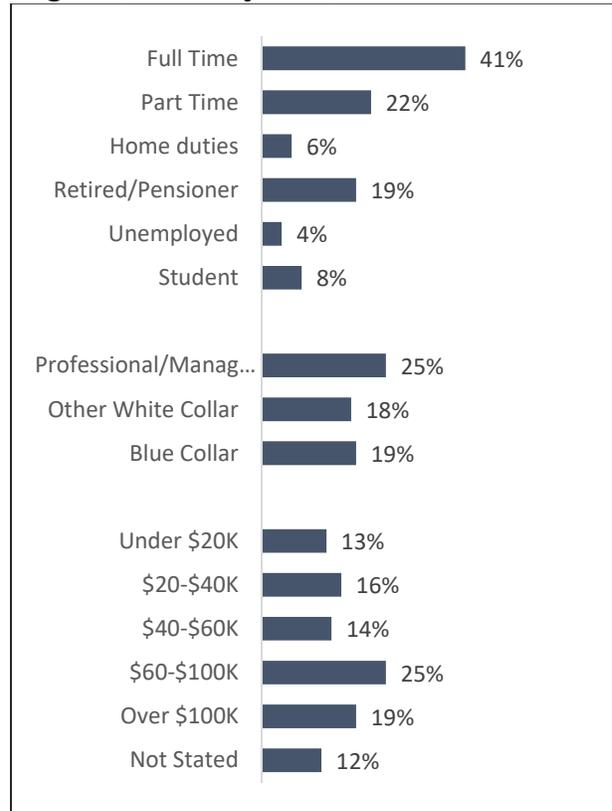
As a proportion of community radio listeners in an average week, 19% earn over \$100,000 pa gross including tax, 25% earn \$60-\$100,000, 14% earn \$40-\$60,000 and 16% earn \$20-\$40,000. 13% earn less than \$20,000.

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 (Fig 15), 41% are employed full time with a further 22% employed part time. Pensioners/retired people account for 19% of listeners and students make up just under one in ten listeners.

Community radio listeners tend to be in professional/managerial roles (one in four); however, 18% work in other 'white collar' roles and 19% in 'blue collar' occupations.

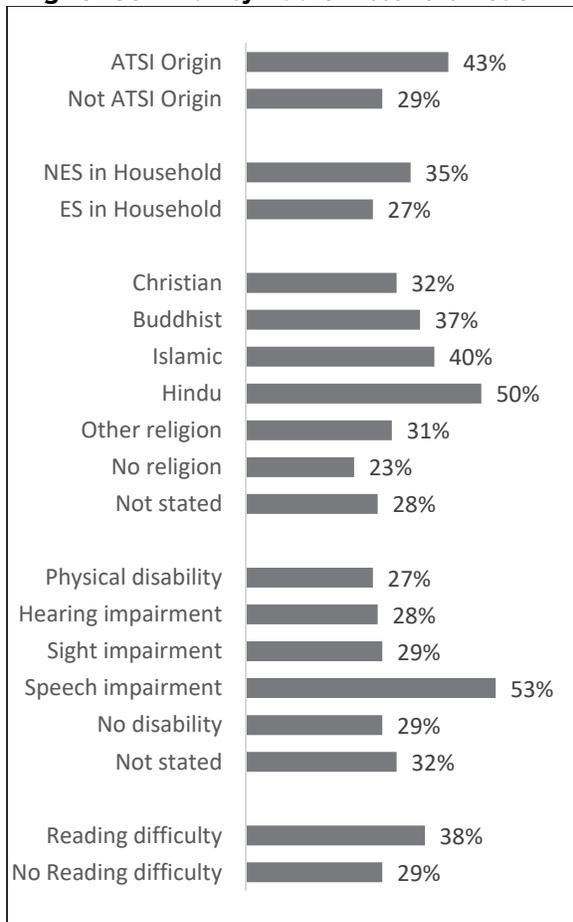
4.11.4 Language and Ethnicity

Over one third of people who regularly speak a language other than English in their household listen to community radio in an average week (Fig 16). This is higher than for people who speak English in their household.

Just over two in five people who indicated that they identify as Aboriginal and Torres Strait Islanders listen to community radio in an average week. This is significantly higher than for people from non-Aboriginal and non-Torres Strait Islander background.

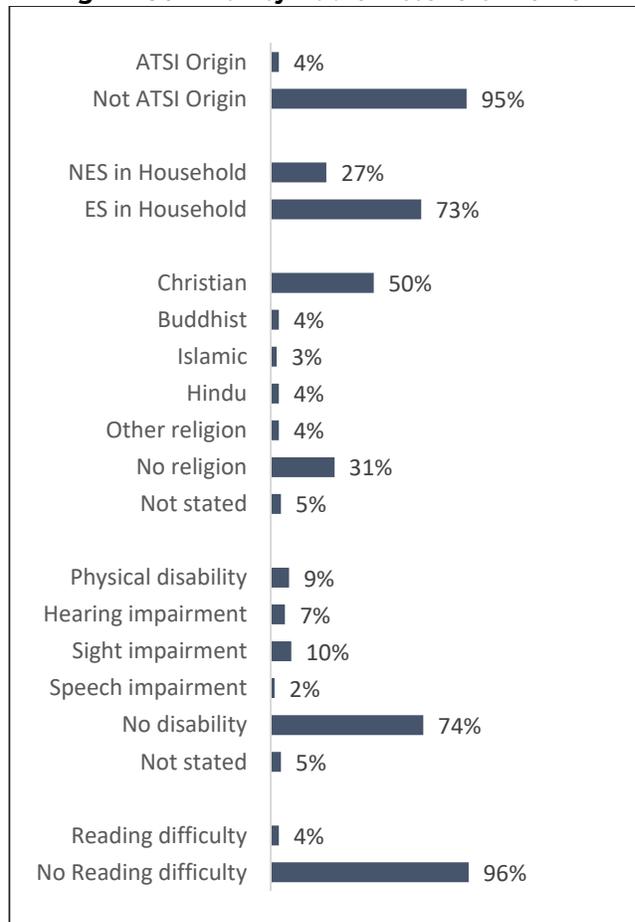
As the chart below (Fig 16) also shows, there is a relatively high proportion of Hindus (50%) and Muslims (40%) listening to community radio in an average week.

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

Over 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 half of community radio listeners in an average week, followed by 31% who have no religious beliefs.

The below table (Fig 18) 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 aged 25-39 years, people working part-time, people from non-English speaking backgrounds 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	56	50	56	50	49
Female	44	50	44	50	51
Age 15-24	16	17	17	16	16
Age 25-39	31	29	28	27	27
Age 40-54	24	26	22	24	24
Age 55+	29	29	33	33	33
Metro	70	73	68	70	68
Non-Metro	30	27	32	30	32
Full time	41	40	40	38	36
Part time	22	20	20	20	19
Home duties	6	8	5	7	8
Retired/pensioner	19	17	21	21	22
Unemployed	4	4	4	4	5
Student	8	10	10	10	11
Professional /Exec.	25	22	25	22	21
Other White Collar	18	19	17	18	17
Blue Collar	19	19	18	18	17
Not Working	38	40	40	42	45
Under \$20K	13	15	13	15	16
\$20K -\$40K	16	16	16	17	18
\$40K -\$60K	14	14	15	14	14
\$60K -\$100K	25	22	23	21	20
Over \$100K	19	19	20	19	17
Not stated	12	15	14	15	15
Indigenous Australians	4	3	4	3	3
Non-Indigenous	95	96	96	97	97
NES in Household	27	23	25	22	23
ES in Household	73	77	75	78	77

NES = Non-English Speaking. ES = English speaking



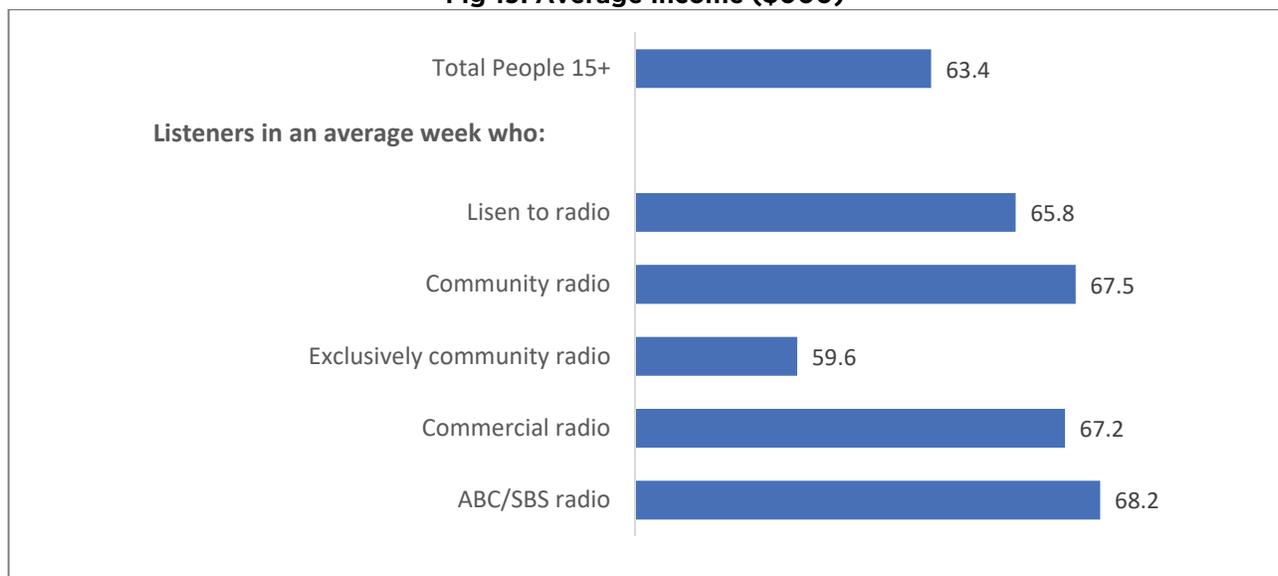
COMMUNITY BROADCASTING ASSOCIATION OF AUSTRALIA

	Community Radio %	Commercial Radio %	ABC/SBS %	All Radio %	Population 15+ %
Total	100	100	100	100	100
Christian	50	48	45	47	46
Buddhist	4	3	4	3	3
Islamic	3	2	2	2	2
Hindu	4	2	3	2	2
Other religion	4	4	5	4	4
No religion	31	37	37	37	38
Refused	5	4	5	4	5
Physical disability	9	8	8	9	9
Hearing disability	7	6	7	7	7
Sight disability	10	9	10	10	10
Speech disability	2	1	1	1	1
No disability	74	77	76	76	75
Refused	5	4	4	4	4
Reading Difficulty	4	3	3	3	3
No Reading Difficulty	96	97	97	97	97

Compared to the average annual gross income for all Australians aged 15 years and over (\$63,400), community radio listeners in an average week earn marginally more (\$67,500). This is followed by ABC/SBS listeners at (\$68,200) then by commercial radio listeners at a marginally lower income.

Those people who exclusively listen to community radio tend to be lower income earners, averaging \$59,600 (Fig 19).

Fig 19. Average Income (\$000)

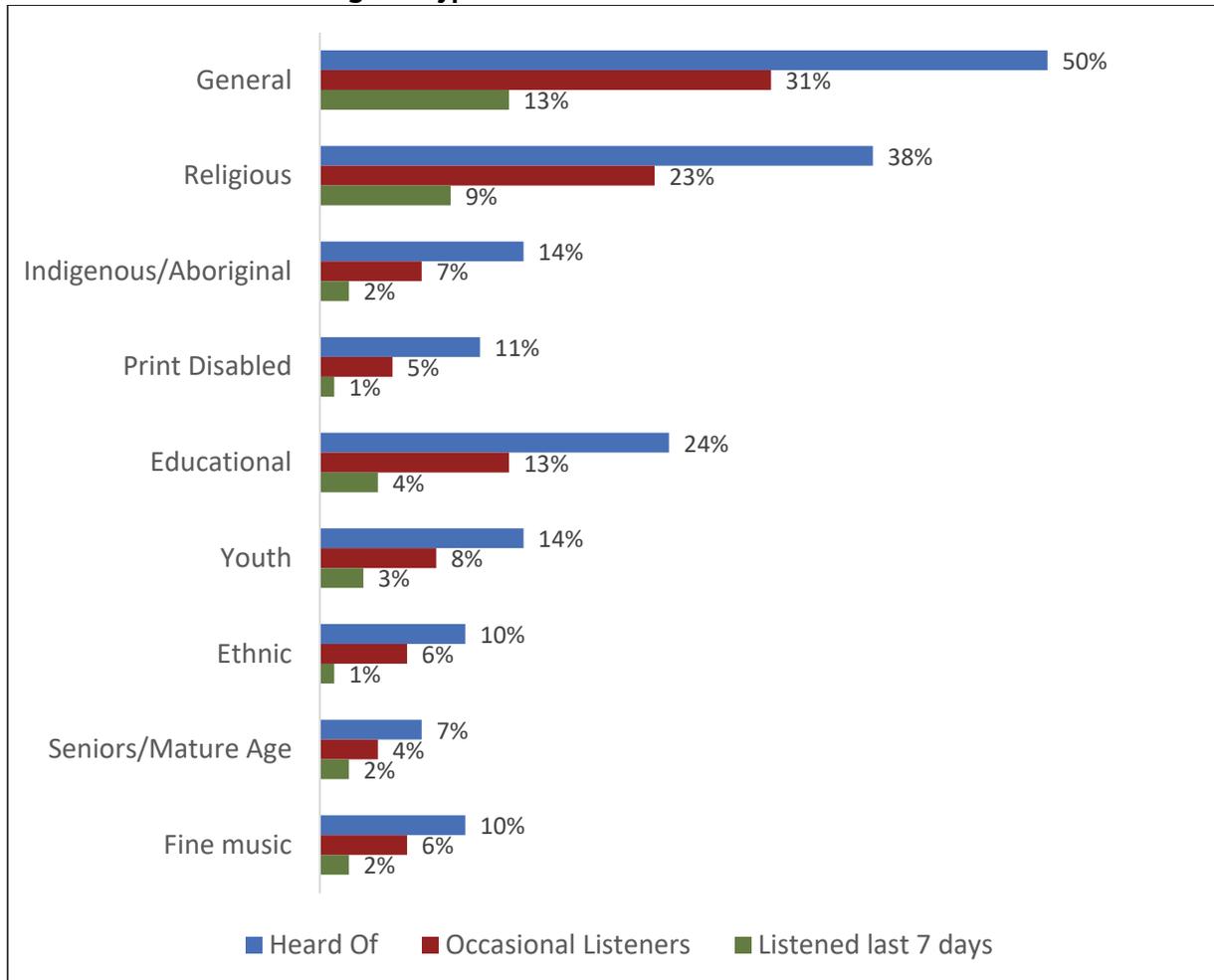


4.12 Listeners to Community Radio by Station Type

Community radio stations are classified according to the type of licence with which they have been issued. Categories (number of licensed stations) include general stations (320), religious stations (39), Indigenous stations (35), print-disabled stations (7), educational stations (8), youth stations (9), ethnic stations (6), seniors/mature age stations (10) and fine music stations (4).

The chart below (Fig 20) 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. Half (50%) of the population has heard of at least one of the stations in this category, and a third (31%) are occasional listeners of a general station - representing about 6,1 million people in the population. Just over one in ten (13%) of the population, or 2,6 million 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. Nearly one in four Australian adults (4,6 million people) are occasional listeners of religious community radio station.

Just over one in ten (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 9%, 4% for educational and 3% for youth stations.

The table below (Fig 21) 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

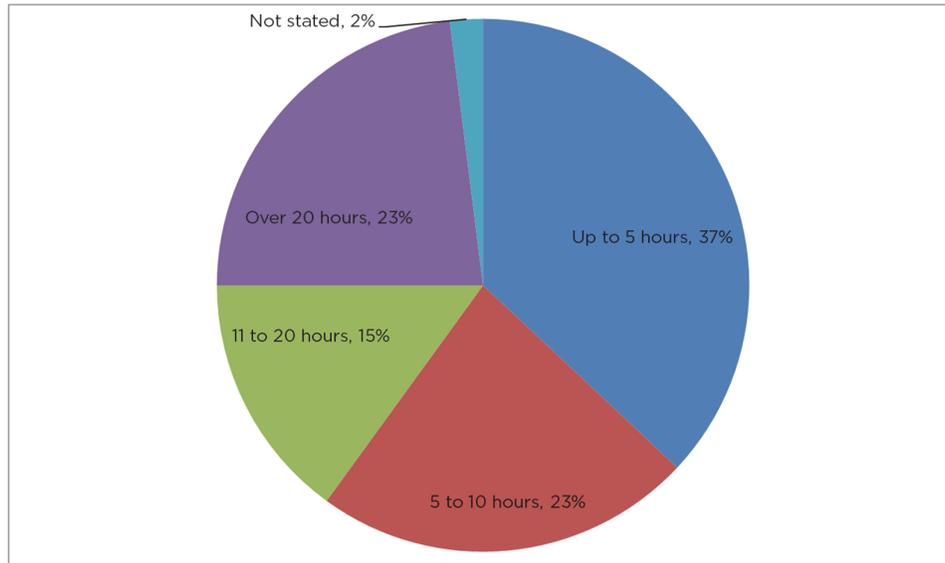
	General	Religious	Indigenous	Print Disabled	Educational	Youth	Ethnic	Seniors/ Mature Age	Fine Music
	%	%	%	%	%	%	%	%	%
Total	100	100	100	100	100	100	100	100	100
Male	59	53	65	59	61	58	63	53	57
Female	41	47	35	41	39	42	37	47	43
15-24	13	20	17	19	15	25	20	12	11
25-39	29	36	40	44	31	43	50	17	32
40-54	25	27	20	15	28	23	21	13	20
55+	34	16	23	21	26	9	10	58	37
Metro	57	81	69	89	97	88	99	41	99
Non-metro	43	19	31	11	3	12	1	59	1
NSW	33	31	20	28	16	35	47	15	51
ACT	1	1	-	2	-	-	2	-	-
VIC	29	27	12	40	31	12	25	11	32
QLD	15	21	43	10	11	19	12	54	14
SA	8	6	1	8	5	33	5	-	3
WA	9	10	15	9	38	-	10	20	-
TAS	4	2	-	3	-	1	-	-	-
NT	2	1	9	-	-	-	-	-	-

4.13 Time Spent Listening to Community Radio

The graph below (Fig 22) shows the proportion of listeners according to how much time they spend listening to community radio in a typical week.

Almost two thirds of community radio listeners listening in an average week listen for 5 hours or more per week.

Fig 22. Hours spent listening in a typical week



Typically, community radio listeners spend 14.7 hours listening to community radio per week. Of this, there is an average of 2.3 hours per weekday. People in NSW spend the most time listening to radio, averaging 15.8 hours per week or 2.4 hours per weekday (Fig 23).

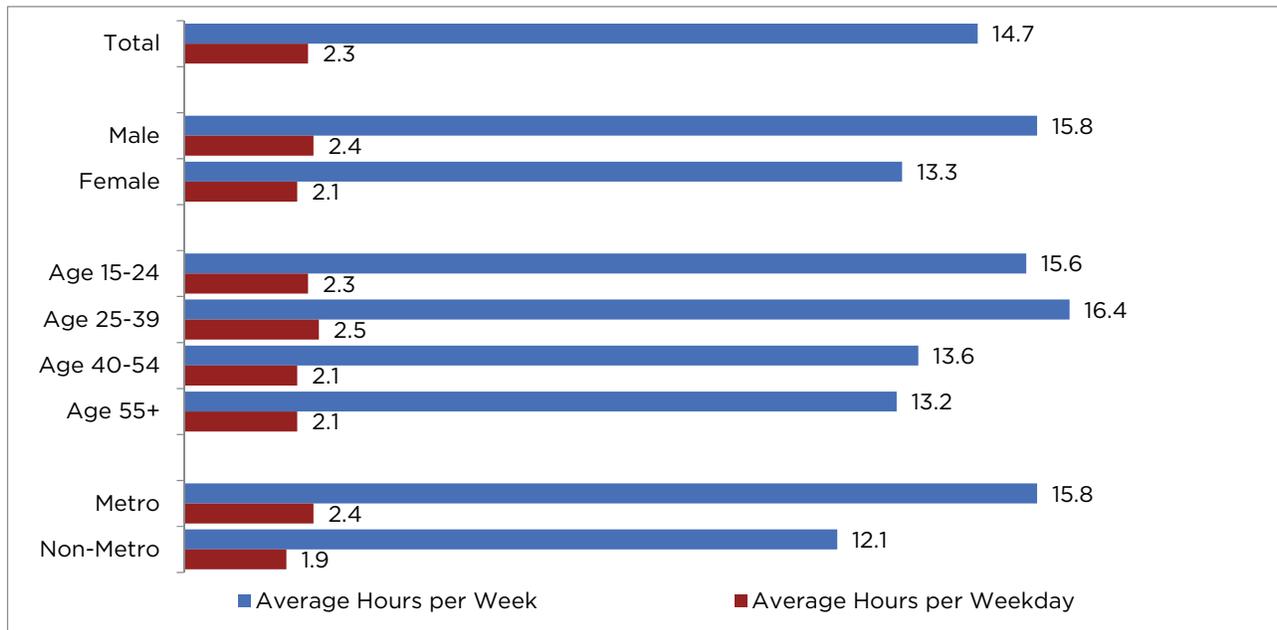
Fig 23. Average no. of hours spent listening per week/weekday

	Per Week	Per Weekday
Australia	14.7	2.3
NSW	15.8	2.4
ACT	8.7	1.3
VIC	14.8	2.3
QLD	13.3	2.1
SA	14.3	2.3
WA	15.2	2.4
TAS	11.9	1.9
NT	13.8	2.1

People aged 15-39 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).

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

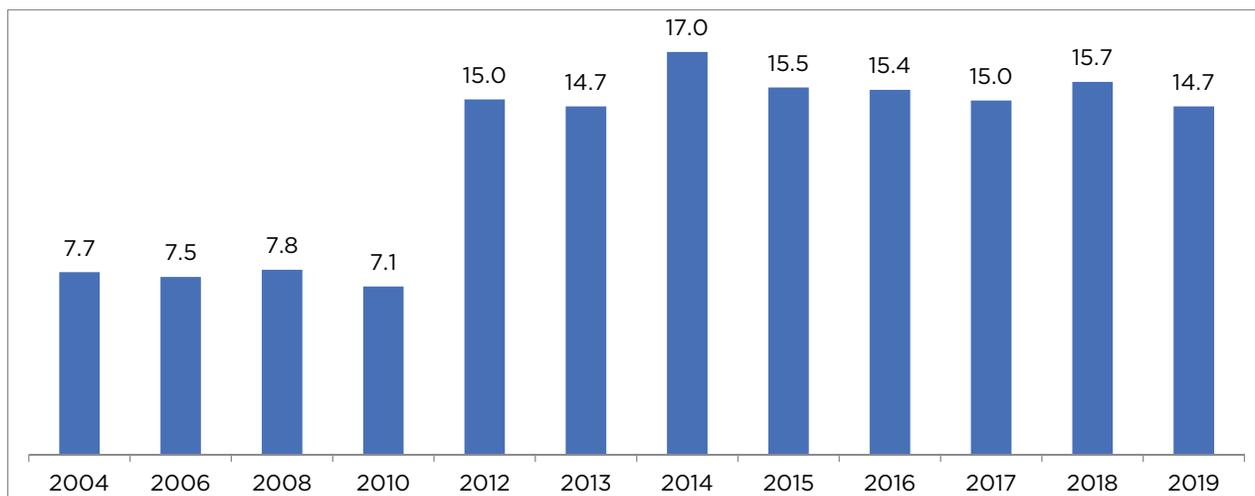
Average hours are of people who listened to community radio in the last week



The graph below (Fig 25) shows the average time spent listening to radio over the last decade. The average time spent listening in 2019 is 14.7 hours, one hour less than 2018. 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



4.14 Share and Time Spent Listening to Community Radio by Location and Mode

In 2017, a set of new questions was introduced to the survey to understand where and how community radio listeners consume community radio.

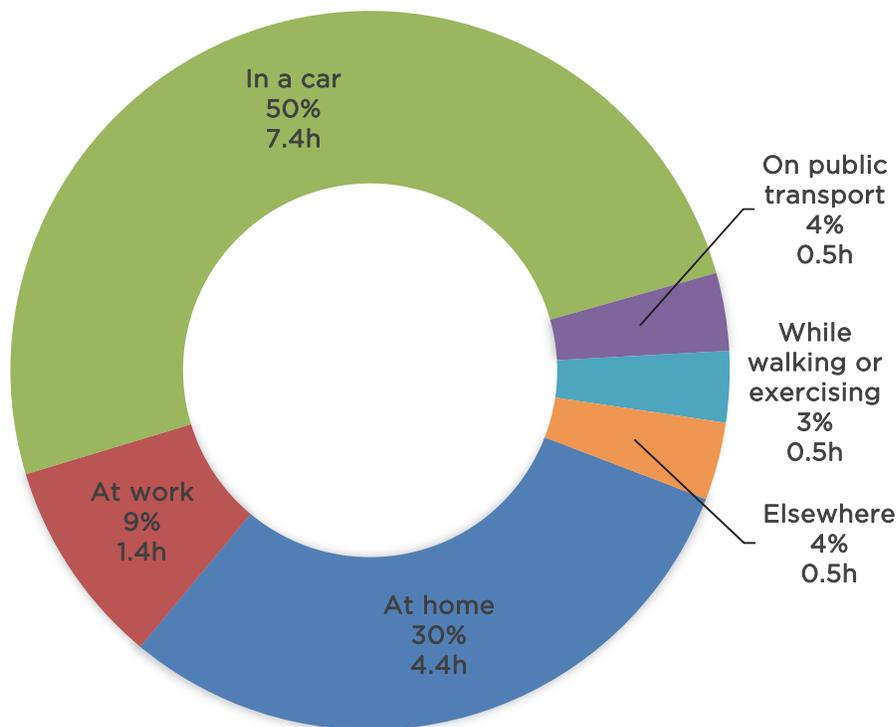
The graph below (Fig 26) shows the share of listening by location. A typical weekly community radio listener spends 50% of their time listening to community radio in the car, 30% is spent at home and 9% at work. Public transport accounts for 4%, 3% are listening elsewhere and a further 3% listen while walking or exercising.

Another way to look at the data is to rework the data and base it on the 14.7 hours average time spent listening per week to community radio nationally.

This means that a typical weekly community radio listener spent 7.4 hours listening to radio in the car and 4.4 hours at home and 1.4 hours at work listening to community radio.

Fig 26. Share & Time Spent Listening to Community Radio by Listeners to Community Radio in an Average Week, by Location

Share and average hours are of people who listened to community radio in the last week



The table below (Fig 27) shows the *main way* that people usually listen to community radio by location. The table shows that overall the main way people listen to community radio is by AM/FM radio with more than half of community radio listeners using this method to access community radio programmes.

As one would expect, listening to community radio is mostly by means of AM/FM radio signal, specifically people listening at home and in the car. In contrast, 48% of people that listened to community radio at work listen via AM/FM, with 21% streaming live radio and 19% via Digital Radio (DAB+).

Total listening by transmission type can be found in Section 4.15 on page 36.

Fig 27. Main Way of Community Radio Listening by Location and Mode

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

	Net	At home	At work	In a car	On public transport	While walking or exercising	Elsewhere
	%	%	%	%	%	%	%
Base	100	100	100	100	100	100	100
AM / FM Radio signal	67	61	48	80	32	31	39
DAB+ Digital Radio signal	11	14	19	8	15	15	10
Live Radio streaming via a website or app such as Tune-in etc.	13	15	21	7	28	24	23
On demand streaming via a website or app such as Tune-in etc.	5	5	6	3	16	15	15
Download Podcasts to listen to later	2	2	4	1	6	12	7
Other (ie. TV signal, VAST Satellite service etc.)	1	2	1	0	2	2	6

The table below (Fig 28) represents the total time spent listening as hours of radio by location and method of listening. This indicates that 9.8 out of the 14.7 hours spent listening in a typical week is done via AM/FM radio, 1.7 hours via DAB+ digital radio sets and 1.8 hours is consumed via live radio streaming. One fifth (21%) of listening while working is done via live radio streaming (presumably because the listener is working at a computer). However live radio streaming at work only accounts for about 18 minutes of the total time spent listening to community radio in a typical week.

Fig 28. Community Radio Listening by Day Part

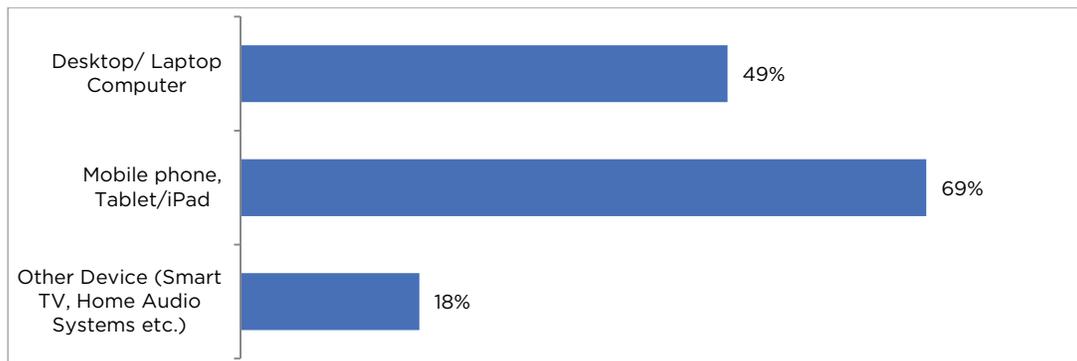
Average hours are of people who listened to community radio in the last week

	Net hours	At home hours	At work hours	In a car hours	On public transport hours	While walking or exercising hours	Elsewhere hours
Total	14.7	4.4	1.4	7.4	0.5	0.5	0.5
AM / FM Radio signal	9.8	2.7	0.7	5.9	0.2	0.1	0.2
DAB+ Digital Radio signal	1.7	0.6	0.3	0.6	0.1	0.1	0.1
Live Radio streaming via a website or app such as Tune-in etc.	1.8	0.7	0.3	0.5	0.1	0.1	0.1
On demand streaming via a website or app such as Tune-in etc.	0.8	0.2	0.1	0.2	0.1	0.1	0.1
Download Podcasts to listen to later	0.3	0.1	0.1	0.1	0.0	0.1	0.0
Other (ie. TV signal, VAST Satellite service etc.)	0.2	0.1	0.0	0.0	0.0	0.0	0.0

In the 2017 National Listener Survey a new question was added, asking about the devices that people use to stream radio (amongst those people who said that they listened in that way). The results show that mobile devices are the most commonly used for streaming (69%), compared to 49% of streaming listeners who do so via a computer.

Fig 29. Devices Used for Streaming Community Radio

Percentages are of people who listened to community radio in the last week by means of a stream



4.15 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. The survey prompts respondents with list of relevant DAB+ stations and asks respondents to nominate if they have listened to any of them.

Just over a quarter (26%) 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 (Fig 30) 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 44%. While the uptake and transition to digital is strong, listening exclusively by analog (AM or FM) still accounts for 56% of listening to all radio (community, commercial, ABC/SBS).

Fig 30. 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	95	95	93	89
Total Digital	44	26	39	47
Both Analog and Digital	39	21	33	36
Analog Only	56	74	61	53
Digital Only	5	5	7	11

4.16 Time of Day Spent Listening to Community Radio

The table below (Fig 31) shows that 88% of weekly community radio listeners listened on at least one weekday (Monday to Friday), and 57% listened at some point over the weekend; this also means that 9% listened exclusively on the weekends. It also shows that weekday listening is at its highest during the workday breakfast session and Mid-morning, with 60% and 54% respectively of all community radio listeners tuning in at these times, and during Drive with 54% of the community radio audience listening at that time. The peak listening time on weekends is breakfast and mid-morning with 30% and 29% (respectively) 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 on an average weekend day, being 63% and 46% 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 63% of community radio listeners. If the message went to air throughout every day Monday to Friday, it would reach 88% 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 31. 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	97	88	57	63	46
5am – 9am Breakfast	67	60	30	37	23
9am – Noon Mid-morning	64	54	29	31	22
Noon – 3pm Afternoon	57	47	26	25	20
3pm – 7pm Drive	62	54	27	31	20
7pm – Midnight Evening	39	33	19	16	14
Midnight – 5am Late night	24	21	11	10	8

Fig 32 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 almost seven in ten (67%) people listening to community radio at breakfast and 64% listening during mid-morning in the last 7 days. This is closely followed by drive time where 62% of listeners to community radio listened between 3pm and 7pm in the last 7 days. The fourth most popular time slot is the afternoon with 57% 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 under 55 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, drive and mid-morning, while regional listeners are more likely to listen during breakfast and mid-morning.

Fig 32. 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	67	64	57	62	39	24
Male	71	66	59	64	45	29
Female	63	62	56	59	32	18
Age 15-24	77	70	65	74	58	40
Age 25-39	76	69	65	72	49	36
Age 40-54	67	56	50	65	34	18
Age 55+	52	63	51	42	23	7
NSW	70	69	60	63	41	27
ACT	66	75	59	55	35	27
VIC	64	58	55	64	44	27
QLD	71	65	56	60	36	24
SA	63	66	60	63	38	19
WA	65	67	58	59	31	16
TAS	57	52	52	54	27	13
NT	61	58	57	64	32	21
Metro	67	64	58	65	42	27
Non-Metro	67	66	56	56	32	17

4.17 Value of Community Radio and its Services to the Australian Community

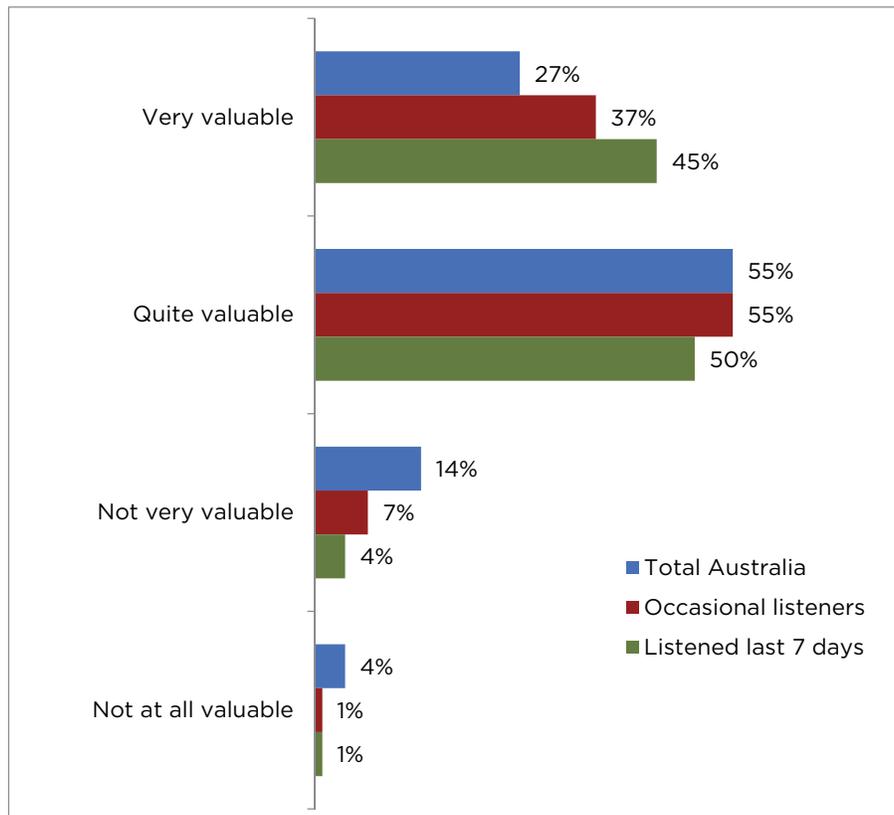
Most Australians find value in community radio. Figure 33 below shows how well the whole community values community radio. The top bar in the chart below represents the total population, the middle bar the views of occasional community radio listeners, while the lower bar is of those who listened in the last 7 days.

Overall, over a quarter (27%) of the population considers it 'very valuable'. Over half (55%) consider it 'quite valuable'.

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 45% saying it was 'very valuable' and 50% 'quite valuable'.

Fig 33. 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 (37%) of occasional listeners and almost half (45%) of listeners in the last 7 days said that community radio is 'very valuable'.

The graph below (Fig 34) 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 seven 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 34. Trend - Net Valuable (Very Valuable/Quite Valuable) of Community Radio
 Percentages are of the total population

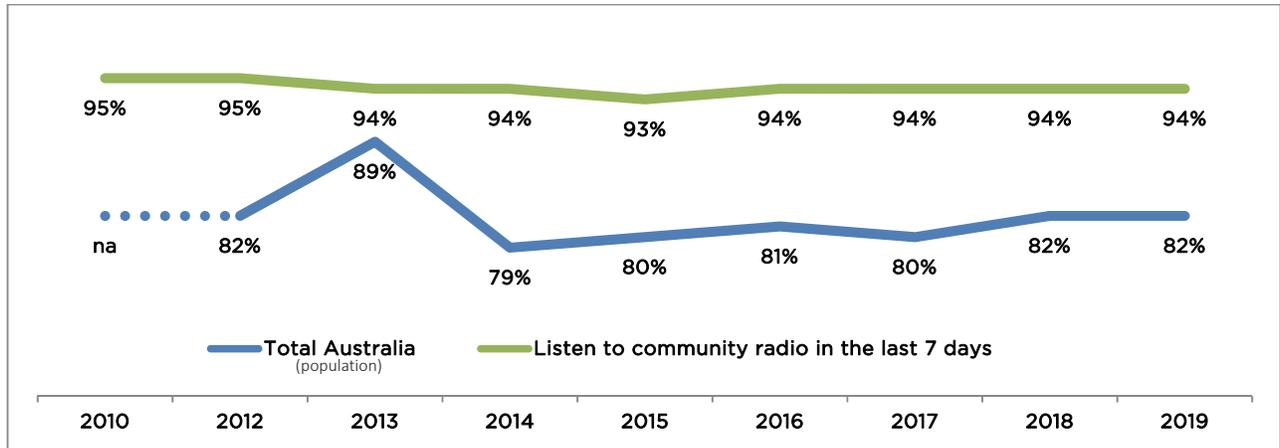


Fig 35 shows that certain community radio listener groups rated the value of community radio greater than others. For instance, women were more likely to rate community radio and its services as 'very valuable', while men were most likely to rate it as 'quite valuable'.

People aged 55 and over are more likely to rate community radio and its services as 'very valuable', while people aged 15-24 are less likely to rate community radio and its services as 'very valuable'.

At least 93% of community radio listeners find value in community radio across all states.

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 35. Value of Community Radio and its Services by Demographic and Geography

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

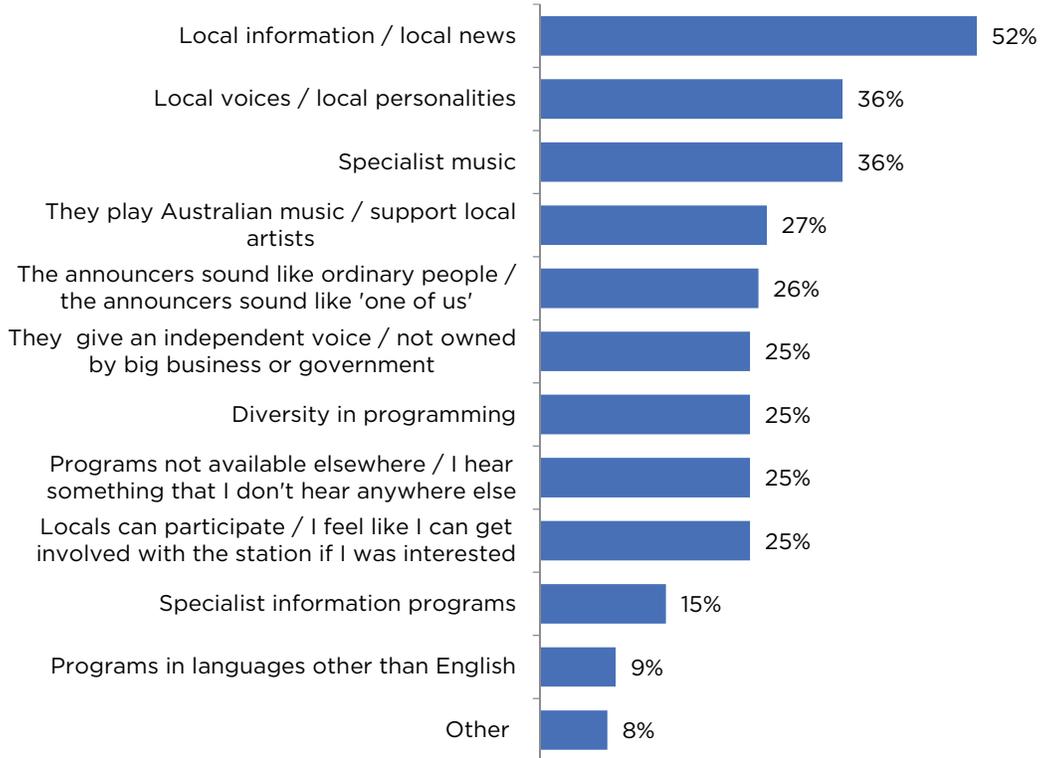
	Very Valuable %	Quite Valuable %	Not Very Valuable %	Not at all Valuable %
Total	45	50	4	1
Male	42	52	5	1
Female	48	48	4	1
Age 15-24	31	55	12	2
Age 25-39	42	53	4	2
Age 40-54	47	49	3	0
Age 55+	53	44	2	0
NSW	46	49	4	1
ACT	56	40	4	-
VIC	42	51	5	1
QLD	45	50	4	1
SA	42	53	4	1
WA	47	47	5	1
TAS	42	54	4	-
NT	58	39	2	2
Metro	43	51	5	1
Non-metro	48	48	3	1

4.18 Reasons for Listening to Community Radio

Community radio keeps people connected to their local communities. Just over half (52%) of 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 36. 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*”, “*local voices/local personalities*” is the second most common reason people listen to community radio, along with listening to their music of choice (“*specialist music*”) (36%). This is followed by 27% who tune in to community radio because “They play Australian music/support local artists”.

Other strong reasons to listen to community radio are that the announcers sound like ordinary people (26%), to hear independent views (25%), that there is diversity in programming (25%), that there are programs not available elsewhere (25%) and that locals can participate/get involved (25%).

For the 918,000 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.

4.19 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 (Fig 37).

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*”, “*specialist information programs*” 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 37. 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, 49% of men who had listened to community radio in the last week gave “local information” as their reason for listening.

	Total	Male	Female	Age 15-24	Age 25-39	Age 40-54	Age 55+	Metro	Non-Metro
	%	%	%	%	%	%	%	%	%
Local information / local news	52	49	56	41	47	55	60	46	65
Local voices / local personalities	36	34	39	37	32	36	40	33	44
Specialist music	36	37	35	32	33	34	43	38	32
They play Australian music / support local artists	27	26	28	25	21	29	33	25	31
The announcers sound like ordinary people / the announcers sound like 'one of us'	26	24	28	22	21	27	33	25	29
They give an independent voice / not owned by big business or government	25	24	27	19	20	25	34	24	27
Diversity in programming	25	25	26	21	26	30	23	27	21
Programs not available elsewhere / I hear something that I don't hear anywhere else	25	25	24	18	23	24	31	26	22
Locals can participate / I feel like I can get involved with the station if I was interested	25	24	25	21	16	26	34	21	33
Specialist information programs	15	14	15	11	13	17	17	15	13
Programs in languages other than English	9	9	8	12	13	7	4	11	4
Other	8	6	9	7	5	9	10	7	9

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

- Those working full time and part-time, were the most likely to appreciate the diversity of programming on community radio.
- People who were retired were most likely to comment that they like the “*local information/local news*”, “*specialist music*”, “*local voices/local personalities*”, as well as “*locals can participate. I feel like I can get involved with the station if I was interested*”; and
- Students and retirees/pensioners were more likely than other groups to listen to community radio because “*they play Australian music/support local artists*”.

**Fig 38. 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

	Total %	Full Time %	Part Time %	Home duties %	Retired/ Pensioner %	Unempl oyed %	Student %
Local information / local news	52	49	50	52	62	51	45
Local voices / local personalities	36	32	37	37	43	36	36
Specialist music	36	34	38	28	45	28	30
They play Australian music / support local artists	27	24	28	20	34	27	29
The announcers sound like ordinary people / the announcers sound like 'one of us'	26	22	25	27	36	23	24
They give an independent voice / not owned by big business or government	25	23	24	21	36	16	23
Diversity in programming	25	28	27	19	23	22	17
Programs not available elsewhere / I hear something that I don't hear anywhere else	25	26	21	20	32	21	16
Locals can participate / I feel like I can get involved with the station if I was interested	25	20	22	22	39	18	23
Specialist information programs	15	15	14	11	18	7	14
Programs in languages other than English	9	10	8	10	4	8	13
Other	8	5	9	8	10	8	9

4.20 Reasons for Listening to Community Radio by Time Spent Listening

Regardless of how long people listen to community radio, “*local information/local news*”, “*local voices/local personalities*” and “*specialist music programs*” are the key motivators for listening (Fig 39). Generally, as time spent listening increases, the local aspects of community radio are increasingly cited as a reason for listening.

Fig 39. Reasons for Listening to Community Radio by Listeners to Community Radio in an Average Week by Time Spent Listening

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	52	51	56	55	49
Local voices / local personalities	36	31	39	38	40
Specialist music	36	31	38	38	41
They play Australian music / support local artists	27	25	27	28	28
The announcers sound like ordinary people / the announcers sound like 'one of us'	26	20	26	29	34
They give an independent voice / not owned by big business or government	25	23	27	26	29
Diversity in programming	25	19	28	30	30
Programs not available elsewhere / I hear something that I don't hear anywhere else	25	20	26	27	31
Locals can participate / I feel like I can get involved with the station if I was interested	25	22	25	22	32
Specialist information programs	15	11	13	16	22
Programs in languages other than English	9	4	8	11	17
Other	8	10	6	5	7

4.21 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*”, “*local voices/personalities*” and “*specialist music programs*” are the main reasons for listening (Fig 40).

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*”.

Fig 40. 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 time of day in a typical week

	Total	5am - 9am Breakfast	9am - Noon Mid-morning	Noon - 3pm Afternoon	3pm - 7pm Drive	7pm - Midnight Evening	Midnight - 5am Late night
	%	%	%	%	%	%	%
Local information / local news	52	52	53	51	50	46	40
Local voices / local personalities	36	37	38	38	38	37	33
Specialist music	36	35	37	36	36	37	30
They play Australian music / support local artists	27	26	26	26	26	23	17
The announcers sound like ordinary people / the announcers sound like 'one of us'	26	26	28	28	27	27	25
They give an independent voice / not owned by big business or government	25	25	26	25	24	22	19
Diversity in programming	25	26	27	26	27	27	26
Programs not available elsewhere / I hear something that I don't hear anywhere else	25	26	26	25	26	28	26
Locals can participate / I feel like I can get involved with the station if I was interested	25	24	27	26	25	23	19
Specialist information programs	15	16	16	15	16	16	16
Programs in languages other than English	9	10	11	11	11	15	20
Other	8	7	7	6	7	4	2

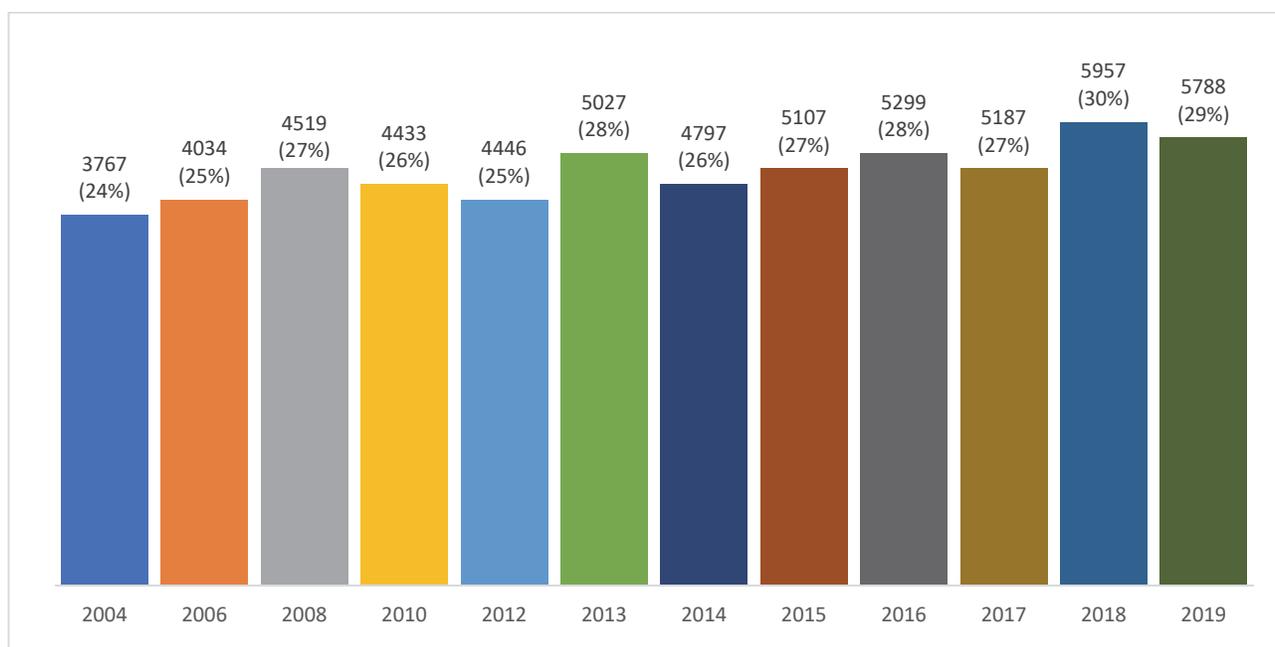
5. Trends

5.1 Community Radio Weekly Listening Trend

Illustrated in Fig 41 below, 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 increased over the last two years to a new height of 5,299,000 listeners in 2016, in 2017 the listening has decreased slightly to 5,187,000 listeners. In 2018 listening has increased again to a new height of 5,957,000. 2019 saw a slight dip in listeners with overall listenership at an estimated 5,788,000 weekly listeners.

Fig 41. Community Radio Weekly Listening ('000)

Percentages are amongst all people aged 15+



5.2 Community Radio Weekly Listening by States Trend

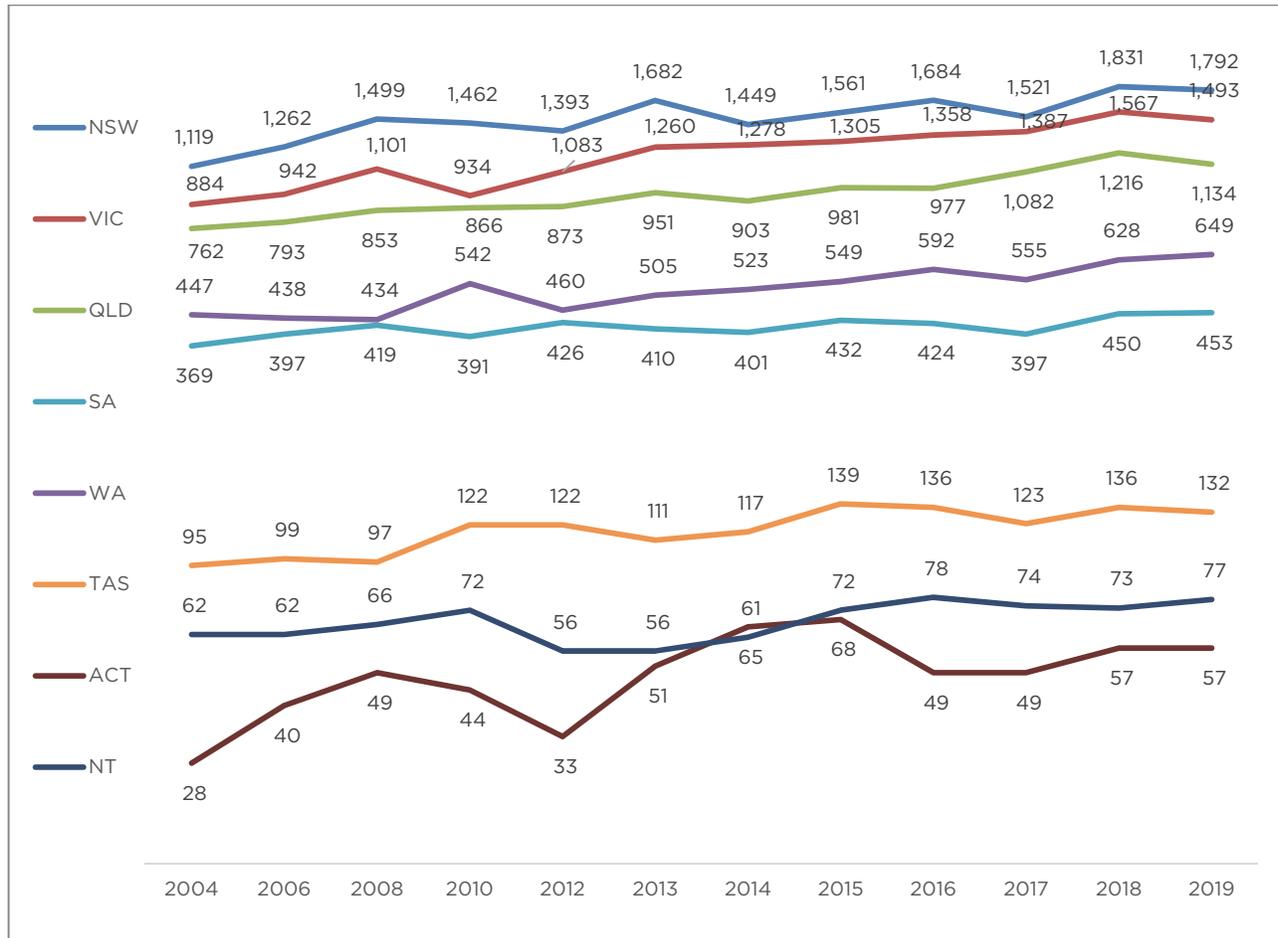
Since the previous surveys conducted in 2004, the estimated number of people in New South Wales aged 15 years and over listening to community radio in an average week has risen from 1,119,000 in 2004 to 1,792,000 in 2019. Victoria has seen an increase in the estimated number of listeners from 884,000 in 2004 to 1,493,000 in 2019.

Comparable results are shown below (Fig 42) for each of the other states and territories.

New South Wales continues to be the state with the largest audience for community radio, followed by Victoria.

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

Percentages are amongst all people aged 15+



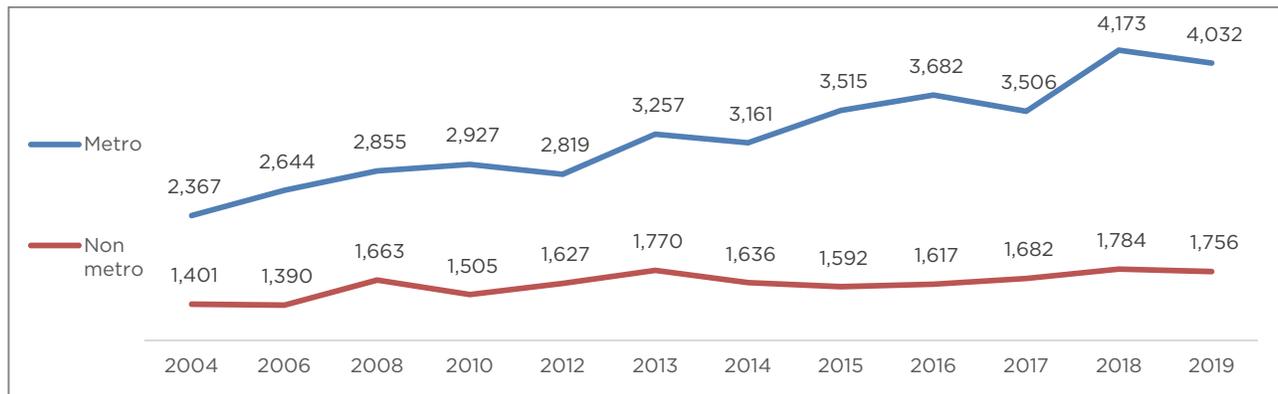
5.3 Community Radio Weekly Listening by Metro vs. Non-Metro Areas, Gender and Age Group Trends

Since the first survey in 2004, the estimated number of people in metropolitan areas (eight cities) aged 15 years and over listening to community radio in an average week, has risen from 2,367,000 in 2004 to 4,032,000 in 2019.

Comparable figures are shown below (Fig 43 to 45) for people aged 15 years and over by region, gender and age groups.

The demographics growing at the highset rate are metro, men and 25 to 39 year olds.

Fig 43. Trend: Population Listening to Community Radio in an Average Week by Metro/Non-metro and Year ('000)



The following charts (Fig 44 and 45) compare each year on key demographic criteria.

Fig 44. Trend: Population Listening to Community Radio in an Average Week by Gender ('000)

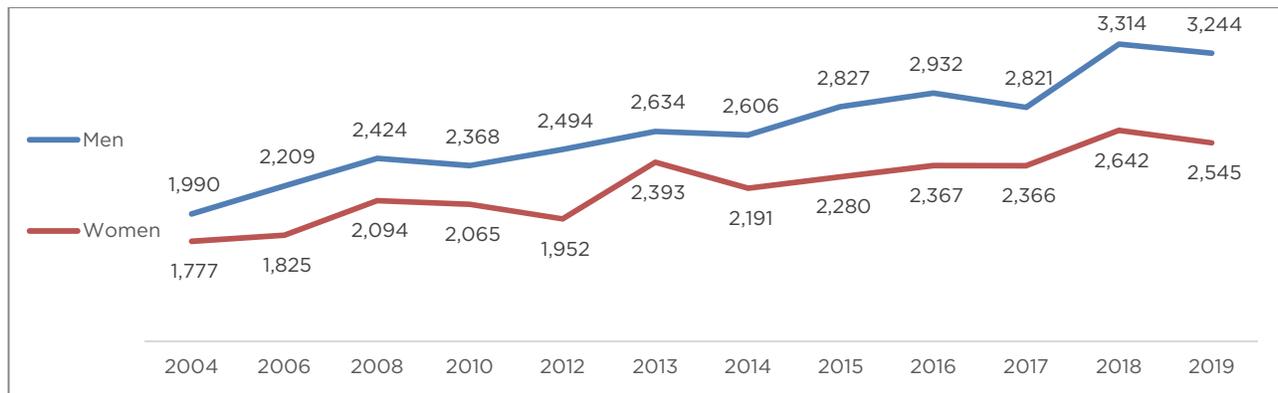
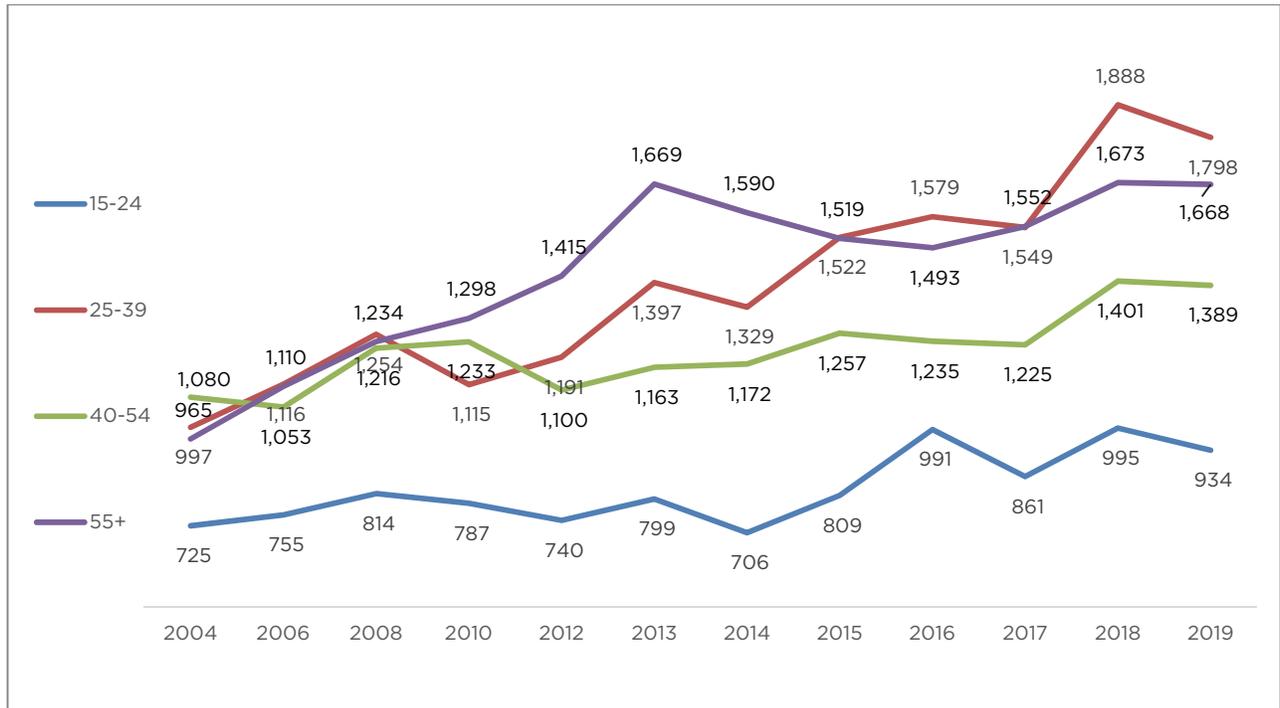


Fig 45. Trend: Population Listening to Community Radio in an Average Week by Age Group ('000)



5.4 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>



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