Listening to the listeners

Radio research

The ABA has been researching community attitudes to radio in Australia.

The results of this research are contained in the full report: *Radio Research - Listening to the Listeners*, written by the consultant to the research, AGB McNair. The report contains the qualitative and quantitative results of the research as well as extensive computer tables of the responses of survey participants to the questionnaire, cross tabulated with key demographic variables. The full report is available from the ABA, price $50.

These extracts are taken from this publication and contain a summary of the main findings of the quantitative stage as well as a summary of radio ratings data for the years 1993 and 1994.

Ratings data were not considered as part of the overall research survey commissioned by the ABA, however, a summary of the highlights pertaining to radio are included in these edited extracts to provide an added perspective to the attitudinal data obtained from the survey. The ratings data were taken from a comprehensive report of ratings for television and radio to be published by the ABA, *Trends and Issues No. 4: Audiences and Programs in 1993 and 1994.* This report will be available soon from the ABA, price $10.

Together, the edited extracts and the full report, *Radio Research - Listening to the Listeners* provide a comprehensive reporting of the results of the ABA research into community attitudes to radio in Australia.

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Introduction

One of the ABA's primary functions is to plan the availability of segments of the broadcasting services bands for broadcasting services and other uses on an area basis.

At present, the broadcasting services bands comprise the AM and FM spectrum used by free-to-air radio services and UHF and VHF spectrum used by free-to-air television services in Australia.

The ABA conducts its planning process in public. In September 1993, it determined priorities for planning all of the broadcasting services bands Australia-wide, dividing the task into five priority groups. Radio and television spectrum in the more remote and relatively poorly served areas of the country received highest priority.

A number of draft licence area plans (LAPs) have been released, setting out the ABA's preliminary views on new broadcasting services and changes to existing broadcasting services in areas covered in the first priority group. Final LAPs are currently in the process of being released. Once the ABA has shown a broadcasting service as available in a licence area plan, it may proceed to allocate a licence for that service.

In performing its planning functions, the ABA must promote the objects of the *Broadcasting Services Act 1992* including the economic and efficient use of the radio frequency spectrum (s.23). It is also required to have regard to a range of matters set out in the Act, including:

> the number of existing broadcasting services and the demand for new broadcasting services within the licence area, within neighbouring licence areas and within Australia generally...[s.23(c)]

In performing its planning functions to date, especially in assessing 'demand' in areas, the ABA has relied heavily on written submissions received from the public and industry as well as on public meetings. It has solicited written submissions in a variety of ways but primarily through advertisements in the print media. To date the ABA has received nearly four thousand written submissions relating to its planning function.

Although calls for written submissions have proved very useful, particularly for gauging interest in providing additional broadcasting services in areas, this process has some limitations as a method of accurately measuring public demand for broadcasting services, or for various types of broadcasting services. The main limitation is the lack of a representative measure of demand. There is no way of knowing whether the views expressed in submissions or at public meetings about the type of services desired in an area are representative of the views of a majority of potential consumers in the area. Another limitation relates to the fact that LAP submissions are being sought on an area by area basis and consequently do not provide an indication of demand across Australia.

Survey research that is based on a probability sample, however, enables one to generalise survey results to a wider population with a high degree of confidence and accuracy. Therefore, it was decided to conduct a comprehensive survey of the Australian population in order to obtain an Australia-wide representative measure of demand by potential consumers for new services.

Research design

The ABA commissioned AGB McNair to conduct national research into radio listening attitudes and behaviours. The research program involved a qualitative and a quantitative stage. The qualitative stage consisted of seventeen focus group discussions held throughout Australia in remote, regional and metropolitan locations involving a total of 138 people. The discussions took place in Sydney, Adelaide, Orange, Bourke and Melbourne between 21 March and 14 April 1994. Four focus groups were held in each of Sydney, Adelaide and Orange, three in Bourke and two in Melbourne.

The quantitative stage involved the administration of a questionnaire to a representative sample of 3217 people aged 14 years and over in metropolitan and regional areas across Australia. The questionnaire was administered face-to-face and was part of AGB McNair's regular omnibus survey program.

Objectives

The objectives of the research were:

• to explore community attitudes to radio services currently available, including people's satisfaction with existing music and program formats;

• to examine the demand for services by category of service;

• to compare the demand for city wide services (community and commercial) with the demand for services covering a sector of the city;

• to examine the demand for services by format type, including new and diverse services, and the extent to which special interest groups are adequately served by existing formats; and

• to gather information about listening behaviour.

Research findings - quantitative stage

Radio listening behaviour

• Radio was listened to on a daily basis by 78% of the population, compared with 84% who watched television daily.

• Radio was used most frequently for music (70%, compared to television 14%), talkback (62%, television 14%), information about new/latest music (43%, television 22%), and to keep people company (40%, television 37%).

• Television was used most frequently for comedy/humour (81%, compared to radio 8%), international news (76%, radio 10%), national news (75%, radio 14%) and entertainment (72%, radio 12%).

• Males changed stations more often than females to listen to specific programs (37% and 29% respectively) whereas females changed stations more often than males to find music they liked (57% and 48% respectively).

Metro vs non-metro

• For the purpose of this research, 'metro' respondents were defined as those living in one of the five state capital cities – Sydney, Melbourne, Brisbane, Adelaide, Perth – while 'non-metro' respondents constituted all other respondents.

• For local/regional news in non-metro areas, people thought television was the place to go (41%), then the local newspaper (27%) and thirdly radio (21%). This question was asked only of those in non-metro areas.

• Thirty three per cent (33%) of people in metro markets and 37% in non-metro markets listened to the same station all the time, while 38% occasionally switched to another station (both metro and non-metro). People who alternated between two or three stations ranged from 20% in metro areas to 16% in non-metro areas.

• Those who did switch were most likely to do so in search of music they liked (54% metro, 49% non-metro). Only one third of those who switched stations did so in search of a specific program (32% metro, 35% non-metro).

Satisfaction with current formats

• Radio and television were the media which provided the highest level of overall satisfaction. When asked to rate the various media on a scale of 1 to 10 where 1 equalled terrible and 10 equalled excellent, the mean rating for radio was ▷

Table 1:
Awareness of, perceived access to and interest in radio services

RADIO CATEGORY	AWARENESS			PERCEIVED ACCESS			INTEREST IN RECEIVING*		
	Metro	Non-Metro	Total	Metro	Non-Metro	Total	Yes	No	Don't Know
	%	%	%	%	%	%	%	%	%
NATIONAL RADIO									
ABC Radio National	76	85	80	72	77	74	7	55	38
ABC Classic FM	53	56	54	58	47	54	7	63	30
ABC Regional/Country	42	64	51	40	60	48	6	65	30
ABC Triple J	60	49	56	58	28	46	10	60	30
ABC Metro Stations	62	51	58	64	34	52	8	57	35
Parliamentary Radio	26	27	27	29	19	25	4	71	25
SBS Radio	38	31	36	37	13	27	7	65	28
COMMERCIAL RADIO									
AM Commercial Radio	83	84	84	78	81	79	8	43	49
FM Commercial Radio	88	79	85	80	66	75	**17**	38	45
COMMUNITY/PUBLIC RADIO									
Community Radio	37	40	38	38	28	34	**12**	59	29
SPECIFIC RADIO FORMATS									
Specialist Music Radio	24	20	22	25	13	20	**14**	59	28
Educational Radio	19	20	19	17	8	14	**13**	62	25
Tourist Radio	13	21	16	14	13	14	7	69	24
Aboriginal/Torres Strait Islander	12	17	14	12	7	10	5	72	23
Pay Radio	4	5	5	6	2	4	3	74	24
Student/Campus Radio	25	24	24	22	10	18	5	70	25
Religious Radio - Christian	27	26	27	27	15	22	3	71	26
Radio for Print Handicapped	13	6	10	14	4	10	3	72	24
Ethnic/Foreign Language Radio	33	20	28	30	9	22	3	72	25
Racing Radio	39	39	39	38	29	34	2	69	29
Religious Radio - Other	10	7	9	15	7	12	1	75	24

**This question was only asked of those who perceived that they did not already have access to this format type.*
Bold *type indicates the highest interest in receiving specific radio services, on a proportional basis.*

7.4, television 7.0, daily metro papers 6.1 and local/regional papers 6.0.

- Almost 1 in 10 respondents (8%) gave a score of 4 or below indicating a low level of satisfaction with radio, while 70% gave radio a rating of between 7 and 10 out of 10, indicating a high level of satisfaction.
- When asked what they liked best about radio, people spontaneously nominated music (44%), news (18%), talk back (14%) and information (13%).
- There was a wide range of responses given to the question 'how could radio be improved to make it better for you'? 'Better choice of music' (9%) and 'less advertising' (7%) were the most common responses given. Younger people nominated 'better choice of music' (21% of 14 to 17 year olds and 17% of 18 to 24 year olds) as to how radio could be improved, whereas older people were inclined to state 'no improvement necessary/happy as it is' (47% of 40 to 54 year olds and 49% of those aged 55 years and over). Responses to this open ended question were extremely diverse and reflected the wide range of interests of the population as well as differences in requirements by age and gender.

Metro vs non-metro

- Of those who did not give radio a high rating (i.e. a score of 4 or below), the most common reasons given for dissatisfaction with radio were 'not into radio or not enough time to listen' (39% metro, 32% non-metro), 'music not appealing' (10% metro, 20% non-metro), 'unintelligent rubbish' (12% metro, 11% non-metro) and 'too much advertising' (12% metro, 10% non-metro).
- Metro listeners claimed to be happier with the radio services available to them. Fifty-seven per cent (57%) of metro listeners believed they 'have plenty of good stations to choose from' compared to 41% of non-metro listeners, while 5% of metro listeners and 12% of non-metro listeners claimed to 'not get enough choice and have to make do with radio which doesn't really suit me'.

Demand for national and community services

- In this research, consumer demand

for new radio services was measured by asking respondents if they would be interested in listening to various types of services to which they currently did not have access. Before being asked if they would be interested in listening to a particular type of radio service, they were asked if they had heard of that type of radio and if they had access to it.

• Perceived access to national radio services was generally high, however, demand for these services did not appear to be particularly strong. The only notable exception was the interest expressed among non-metro respondents who perceived that they did not have access to these stations, to receiving Triple J (16%) and ABC metro stations (11%).

• Perceived access to community radio was quite low at 34% of the total population (38% metro, 28% non-metro) and may have been a reflection of the confusion surrounding the definition of community radio rather than a reliable measure of access.

Demand for commercial radio services

• Before measuring demand for particular types of radio services, the level of awareness of the services was assessed. Eighty four per cent (84%) of respondents said they had heard of commercial AM services, while 85% said they had heard of commercial FM services.

• 815 respondents (25%) said that they did not have access to, or gave a response of 'unsure/don't know' when asked whether they had access to commercial FM services. When these 815 people were asked if they would be interested in listening to commercial FM services if they could have access, 17% said 'yes', while 38% said 'no' and 45% answered 'don't know'.

• 673 respondents (21%) said that they did not have access to, or gave a response of 'unsure/don't know' when asked whether they had access to commercial AM services. Eight per cent (8%) said that they would be interested in listening to commercial AM services if they could have access, while 43% said they would not and 49% answered 'don't know'.

• It should be noted that the measurement of demand for radio services was limited in this survey to those people who perceived that they did not have access to a particular service. Also, when asked if they would be interested in receiving commercial AM or commercial FM radio services, close to half of the respondents who did not have access could not say if they would be interested or not and answered 'don't know'. This may be due to the broad nature of the question that was put to respondents. Commercial radio services can have a wide range of program formats and the high 'don't know' response may be due to the lack of specificity in terms of the nature of the services being considered.

• At 17% (7% metro, 26% non-metro), the level of interest for commercial FM services represents proportionately the strongest level of demand for all the services that were considered in the survey (see Table 1).

Demand for specific radio formats

• Respondents were also asked about their interest in a range of new and diverse radio formats. These specific radio formats fell into the broad headings of entertainment, education and information, although within these definitions a range of special interest services were also discussed.

• Of these specific radio formats, awareness was highest for racing radio (39%), ethnic/foreign language radio (28%) and religious radio (Christian) (27%). However, interest in receiving these services, by those people who perceived that they did not have access to them, was comparatively low with racing radio (2%), ethnic/foreign language radio (3%) and religious radio (Christian) (3%).

• Pay radio (5%), 'other' religious radio (9%), radio for the print handicapped (10%) and Aboriginal/Torres Strait Islander radio (14%) had the lowest awareness levels.

• Of those who did not perceive they had access to a specific radio format, specialist music radio (14%) and educational radio (13%) received the highest levels of interest.

Table 1 lists all the types of radio services considered in the national survey. It details the percentage of people in the community who were aware of a particular service, who said they had ▷

Table 2:
Average Weekly Time Spent Listening to All Radio for Five Mainland City Markets 1993 - 1994

		All People 10+ Yrs HRS:MINS	Men 18+ Yrs HRS:MINS	Women 18+ Yrs HRS:MINS
Sydney	1994	22:33	24:41	23:12
	1993	23:20	24:59	24:18
Melbourne	1994	23:13	25:34	23:42
	1993	22:56	25:01	23:33
Brisbane	1994	21:42	24:12	22:00
	1993	21:11	23:31	21:40
Adelaide	1994	24:02	25:54	24:48
	1993	23:17	24:32	24:18
Perth	1994	22:16	24:55	22:31
	1993	22:03	24:46	22:04

Note: *Data are averages for the period 5:30 a.m. to 12 midnight, Monday to Sunday, for all surveys conducted in year.*

Source: *AGB McNair.*

Table 3:
Average Weekly Time Spent Listening to All Radio by Age Group for Five Mainland City Markets 1993 - 1994

		10-17 YRS HRS:MIN	18-24 YRS HRS:MIN	25-39 YRS HRS:MIN	40-54 YRS HRS:MIN	55+ YRS HRS:MIN
Sydney	1994	12:41	21:57	22:03	23:55	27:38
	1993	13:44	22:28	23:33	24:22	27:38
Melbourne	1994	12:44	23:51	23:22	24:09	26:51
	1993	13:37	22:52	22:45	24:03	27:05
Brisbane	1994	13:02	23:29	22:58	22:28	23:38
	1993	13:09	24:02	22:31	21:40	22:37
Adelaide	1994	14:47	24:20	24:45	24:19	27:10
	1993	14:18	22:31	23:24	24:51	26:08
Perth	1994	13:03	24:56	24:08	22:51	24:12
	1993	13:32	22:51	24:31	22:20	23:29

Note: *Data are averages for the period 5:30 a.m. to 12 midnight, Monday to Sunday, for all surveys conducted in year.*

Source: *AGB McNair.*

access to that service and who said they would be interested in listening to that type of radio service.

Ratings data - who's listening?

Radio ratings data are another source of information capable of providing insights into radio listening behaviour. While the survey research commissioned by the ABA and the LAP submission process conducted by the ABA were able to provide valuable data on community attitudes to radio, ratings data provide actual information on the amount of time people listened to the radio, who was listening and what they listened to.

The ABA will soon publish *Trends and Issues No. 4: Audiences and Programs in 1993 and 1994*, an analysis of ratings data for television and radio which covers the years 1990 to 1994. The ratings data for radio were supplied by AGB McNair who conduct a series of radio audience surveys in major metropolitan areas using a diary system. Radio ratings data were collected for Sydney, Melbourne, Brisbane, Adelaide and Perth and the results are analysed in the ABA publication. Ratings data for television were supplied by A.C. Nielsen who use Peoplemeters to collect television ratings data from five mainland capital cities - Sydney, Melbourne, Brisbane, Adelaide and Perth.

While ratings data were not considered in the qualitative or quantitative stage of the survey research, a summary of the highlights for 1993 and 1994, included in *Trends and Issues No. 4,* is presented here to provide some perspective and background to the findings of the survey research. It should be noted, however, that the figures for 1993 and 1994 may only be indicative of a trend. One year is too short a period to establish any conclusions regarding listening times.

How much radio do we listen to?

Average weekly time spent listening varied according to gender, age and location. In 1994, the average time spent listening to radio for all people (aged 10 years and over) was highest in Adelaide and lowest in Brisbane (see Table 2). Average weekly time spent listening increased in Melbourne, Brisbane, Adelaide and Perth, but decreased in Sydney.

Gender differences

- From 1993 to 1994, overall listening time for men (aged 18 years and over) and for women (aged 18 years and over) fluctuated. There were increases in average weekly time spent listening in Melbourne, Brisbane, Adelaide and Perth, but a decrease in Sydney.
- Men spent more time listening to radio than women in all markets in 1994. The difference was greatest in Perth and least in Adelaide. Conversely, women watched more television than men. The greatest difference was in Sydney, and the least in Brisbane.

Age differences

- Of all the age groups, 10 to 17 year olds spent the least amount of time listening to radio in all markets. Listening time declined in all markets, with the exception of Adelaide, from 1993 to 1994 (see Table 3). Sydney and Melbourne recorded the largest declines.