

2009 Communications Policy and Research Forum

The 2009 Communications Policy and Research Forum (CPRF) was held at the University of Technology Sydney from 19 to 20 November 2009. Building on its past commitment to the forum, the ACMA was well-represented with presentations by four staff members who highlighted the breadth of research undertaken by the ACMA annually.

The CPRF is an annual and well-credentialed research-oriented forum comprising presentations and papers across a range of communications issues, presented from different policy and professional perspectives. It is a significant meeting place for academics, industry and government researchers and policy makers.

Community research is used by the ACMA to understand Australians' use of media and communications technologies, and to gauge the community's views on a range of issues. This type of research is integral to the ACMA's evidence-based approach to its regulatory responsibilities. In addition to publishing the research, the ACMA participates in public forums such as the CPRF to disseminate its findings through presentations and briefings for interested stakeholders.

The session hosted by the ACMA was titled *Questions for regulation in a changing communications environment*.

Paul Nicholas presented recent research into substitution between fixed and mobile voice services by Australian consumers, identifying those consumers who prefer fixed-line services for their communications needs, and discussing how this work helps inform consideration of future voice regulation.

Lesley Osborne examined barriers to effective use of digital media and communications, in particular motivation, skills and concerns around use of personal information online, based on ACMA qualitative and quantitative research. The findings have implications for the ACMA's cybersecurity education programs and for promoting digital media literacy more broadly.

The third presentation was by Rosalie O'Neale who discussed the ACMA's research into the social networking behaviour of young people, and what this means for the ACMA's role in providing cybersafety education for young Australians and their parents.

In a separate session shared with Professor Trevor Barr of Swinburne University, Margaret Cupitt from the ACMA, delivered a presentation titled *News and current affairs: Delivery platforms and audiences*. Drawing on a range of ACMA primary research plus ratings data and other secondary sources, the paper illustrated the continuing importance of radio and television for audiences, together with the increasing significance of the internet for news and current affairs, especially for younger Australians.

Below is an extract from Margaret Cupitt's presentation.

Radio

ACMA research found that most Australians—around 90 per cent—continue to tune in to radio 'regularly' (at least once a week), based on data from 1994, 2003 and early 2009.¹ However, young people aged 10–17 spent less time listening to radio in 2008 compared with 1987 (a decline of about six hours per week).²

In February 2009, music attracted three-quarters of radio listeners surveyed by the ACMA, followed by news and information, and talkback at 68 per cent and 46 per cent respectively. News and information, and talkback programming were most popular with older listeners.³

To give an idea of how much listening occurs online, Nielsen Online found that eight per cent of internet users aged 16 years and over 'regularly' listened to online radio in 2008.⁴ Use of portable music players is the most likely reason for lower radio listening. The ACMA found that 46 per cent of 8–17 year olds and up to 79 per cent of 15 year olds used an MP3 or MP4 over three days in 2007.⁵

Television

In June this year, *Free TV Australia* reported that free television attracted an average 13.1 million Australian viewers every day.⁶

Total television viewing time—including both free-to-air and subscription television—remained perhaps much the same between 1987 and 2007, with some decline over the three years from 2005 to 2007. In the 30 per cent of homes with subscription television, total television viewing time for different age groups was considerably higher than in free television only homes. In free television only homes there has been a decline of about 4.5 hours for young viewers (5–12 years) from 1987 to 2007.⁷

A substantial majority of Australians—92 per cent—watched a current affairs program on television in the month prior to an ACMA survey conducted in 2008.⁸ Reported viewing was high for all age groups, ranging from 87 per cent for 18–24 years to 95 per cent for those aged 65 years and over.

Looking at the online audio-visual environment, Nielsen Online reported that 37 per cent of internet users aged 16–19 had 'regularly' downloaded video.⁹ This compares to 19 per cent for all internet users aged 16 years and over. 'Regular' video streaming was lower at 15 per cent of all users.

1. ACMA (2009) *Community attitudes to radio content*—soon to be published, ABA (2003) *Understanding community attitudes to radio content*, and ABA (1994) *Listening to the listeners*.
2. Radio ratings from McNair Anderson (1987), AGB McNair (1994), Nielsen Media Research International (2001), The Nielsen Company (2008).
3. ACMA (2009) *Community attitudes to radio content*—soon to be published.
4. Nielsen Online (2009) *The Australian internet and technology report* Edition 11, February 2009.
5. ACMA (2007) *Media and communications in Australian Families*.
6. Free TV Australia, 22 June 2009 media release *More Australians tuning in to Free TV*.
7. McNair Anderson (1987), Nielsen Media Research (1994), ACNielsen International (2001), OZTAM (2005-2007).
8. ACMA (2009) *Community attitudes to the presentation of factual material and viewpoints in commercial current affairs programs*.
9. Nielsen Online (2009) *The Australian internet and technology report* Edition 11, February 2009.

Other media

Figure 1 shows that ABC television and Australian newspapers were rated as 'extremely' or 'very' important sources of news and current affairs by just over half of the radio listeners surveyed. ABC radio was the most important radio source (44 per cent), followed by Australian commercial radio (27 per cent) and community radio (18 per cent). With the exception of the 'internet-only' category, the other media sources are traditional media.

The importance of ABC radio and ABC TV news and current affairs increased with age and peaked for older age groups, while commercial television was considered more important by younger age groups. No distinct age variation was evident for commercial radio sources.

Internet

It is very clear that 'internet-only' sources of news and current affairs are most important to the younger age groups, reflecting the strong relationship between age and internet use generally.

Recent ACMA research has found that household penetration of the internet is 75 per cent.¹⁰ Weekly internet participation ranges from a high 93 per cent for 18–24 year olds, down to 19 per cent for people aged 75 and over.

Figure 2 shows participation in the eight most popular internet activities for people aged 18 years and over. Audio-visual content appeals mainly to young internet users, with some of the top online activities for 18–24 year olds being social networking (ranked third), news, sport and weather (ranked fourth), streaming audio or video (ranked sixth), and downloading audio, video, podcasts or vodcasts (ranked eighth).

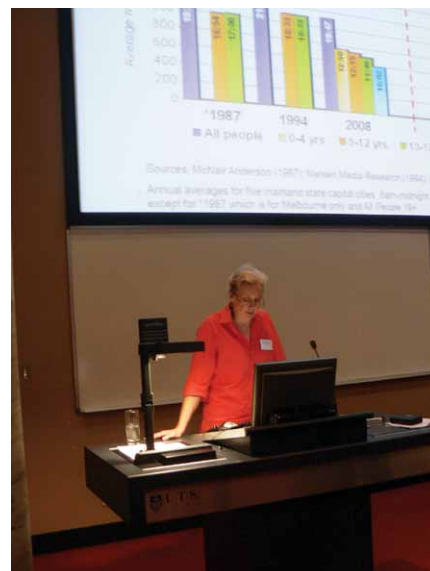
In contrast to 18–24 year olds, older people aged 55–64 who use the internet had much the same top eight activities as those shown in Figure 2 for users aged 18 years and over generally.

Concluding comments

- > radio and television continue to be significant for audiences
- > young people aged 10–17 are spending less time listening to radio, while those aged 13–17 are spending less time watching television in free-to-air television only homes
- > the additional choice offered by subscription television has resulted in higher overall television viewing in subscription television homes

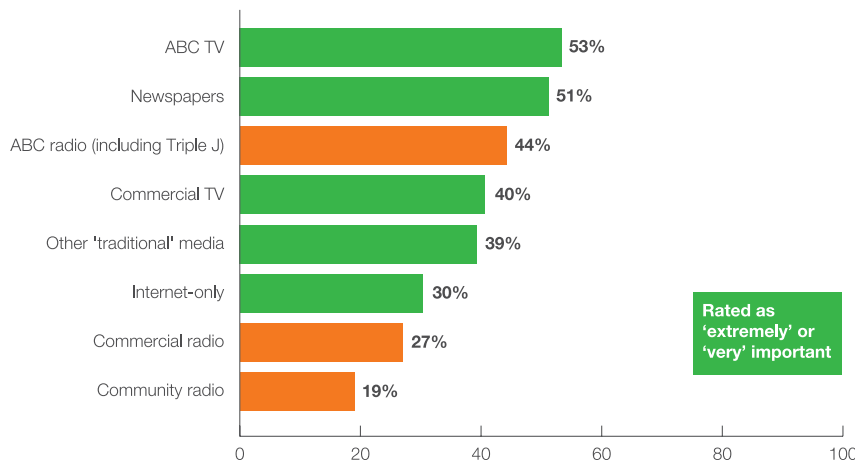
- > radio and television are valued sources of news and current affairs, particularly for older audiences
- > traditional sources of news and current affairs are given high importance
- > there is considerable interest in audio-visual content, whether offered on television, DVD or the internet
- > there has been significant movement by young people to online sources for music, news and current affairs, and audio-visual content
- > total media use has expanded to take advantage of greater choice of services and encompasses online platforms. ☎

These ACMA presentations and the many others given at the forum are available from the Network Insight website at www.networkinsight.org.



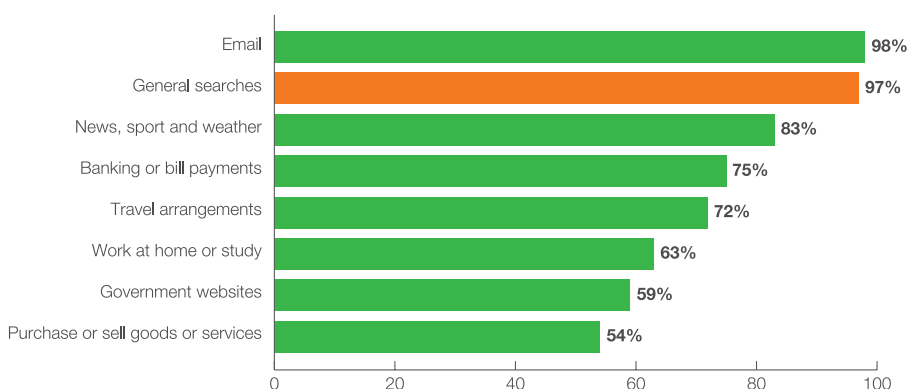
Margaret Cupitt from the Strategic Research Section at the ACMA presents at the 2009 Communications Policy and Research Forum.

Figure 1: Importance of media sources for news and current affairs information (includes 'traditional' media via the internet), February 2009



Source: ACMA (2009) *Community attitudes to radio content*—soon to be published. Base: All radio listeners n=1423 (comprising 93 per cent of the total sample). Note: 'internet-only' refers to news and current affairs services that can only be accessed from the internet.

Figure 2: Participation in top eight internet activities in last six months by people aged 18 years and over, April 2009



Source: ACMA (2009) *Telecommunications Consumer Survey*—soon to be published. Base: n=1201.

10. ACMA (2009) *Telecommunications Consumer Survey*—soon to be published.