
Listening Figures Report

April 2010

Summary

- (1) The Listener Numbers Survey 2010 aims to provide an indication of the number of people that listen to the station and how often they do so.
- (2) 283 people were interviewed using a non-probability sampling technique. 189 of these lived in the total survey area (TSA) – the stations reach area defined by the station. The sample was unintentionally biased to those aged under 45.
- (3) A respectable third of ALL people, and 40% of those from the total survey area had mentioned, unprompted, that they had heard of the station. However the station had the least awareness of nearly all the local radio stations, but it has to be taken into account that they are the newest station broadcasting to area and are likely, due to their community radio status, to have the lowest marketing budget and resources.
- (4) When asked unprompted, a fifth of all respondents had listened at some point, 16% had listened in the last month and 12% had listened within the last week at the time of the survey. Of those from the total survey area, 24% had listened at some point, 19% had listened in the last month and 16% had listened within the last week.
- (5) Of respondents from the total survey area, the station had a slightly higher proportion of listeners than all the other local radio stations. Younger people were more likely to listen to the station than most of the other local stations.
- (6) When prompted, 53% of all respondents claimed that they had heard of the station which is an improvement on the previous 2008 survey where 43% stated they had heard of the station. 61% who had lived in the total survey area had heard of the station and younger people were more likely to have heard of the station.
- (7) 53% of all respondents who had heard of the station when prompted stated they currently listened to the station. This means that 35% of the sample overall stated that they listened to the station when prompted (a significant increase on a fifth who said they did when asked unprompted).
- (8) Of respondents who stated that they currently listened to the station, 37% said they listened occasionally, 12% only to certain shows, 24% weekly and 27% most days. This equates to 14% of the whole sample listening weekly – 2% more than when asked unprompted.

- (9) On a weekly basis, the station reaches an estimated 16% of its total survey area which equates to an estimated 15,520 listening weekly. Based on 35% of the sample stating they listen on at least an occasional basis, the station may reach up to 33,950 people on an occasional basis.
- 10) Over half the respondents that do not currently listen to the station said that they would do so in the future after finding out about it or more about it.
- 11) 79% of all respondents listened to radio generally (not just focused on the station) on AM or FM, 30% listened online, 25% listened on DAB radio and 9% listened to podcasts. The station's listeners followed this trend, apart from more station listeners listening online than people who did not listen to the station and it is not possible to listen to the station on DAB. Younger people were more likely to listen online to radio generally and to podcasts provided by radio stations generally.
- 12) There are a growing number of people listening via the internet and to podcasts. The number of people listening online in an average month is 6,316 (almost twice as many hours as 2008) and the average number of unique IP addresses streaming the station each month has increased by around 100% each year since 2008 to be 4,961 in 2010. 17,000 podcasts were downloaded in 2009 and an estimated 21,600 may be downloaded in 2010.

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1. Introduction

This report presents findings from the Listener Numbers Survey 2010. The aim of the survey is to provide an indication of the number of people that listen to the station and how often they do so. The survey built on information gathered two years previously (April 2008) in a similar street survey and aimed to establish changes in listenership since that period.

The research was carried out by Blueprint Research, supported by a team of volunteer community researchers, in April 2010.

2. Background

The station is a community radio station based in the area which broadcasts on xxxFM. The station operated on a number temporary licences before it was granted a full-time licence from Summer 2007. The station's primary audience is residents living in the area but more broadly its range or total survey area established by Ofcom is the wider area (postcodes XX1-6, XX8-10).

In Spring 2006 a 'Public Feasibility Survey' was carried out in city centre to determine public interest in the station and its potential audience should it be granted a full-time licence. In 2008 a survey followed on from that research and identified the extent to which the station has developed its audience since broadcasting on a full-time basis. This survey aims to build further on that information and also provide reference information for future public surveys.

3. Methodology

3.1 The approach

The methodology broadly adopted follows that suggested by Janey Gordon, a Principal Lecturer in Media at the University of Bedford. A team of volunteer community researchers were recruited by the station to administer the survey. A short training session was held for the community researchers to introduce them to the basics of carrying out research with members of the public.

The survey was conducted over a two day period in XX city centre in April 2010. The sampling approach was 'opportunistic'; that is, selecting people because they were available in the location at that time. The problem with this sampling method, however, is that it may not be representative of the concerned population. In light of this the community researchers were instructed to try and obtain an equal number of males and females and an even spread of age ranges. The sample was not restricted to those living in the total survey

area¹. Indeed, as the station can also be listened to online, those listening outside this area were also interviewed. In total **283 people were surveyed, of which 189 (70%) were based in the total survey area.**

Part of the design of the survey had changed significantly since previous surveys, in that people were asked *unprompted* what stations broadcasted to the area, which they had ever listened to, which they had listed to in the last month and week. This approach was taken to allow for similarities to the RAJAR methodology which asks people unprompted what stations they have listened in the last week (although the methodology is administered differently). The unprompted approach allowed for a more reliable comparison to other stations and allowed an assessment of the station's impact on the local radio station market.

The unprompted questions were followed with questions included in the previous public surveys to allow for comparison over previous years. These questions gathered basic demographic information and including prompted questions about whether respondents had heard of and listened to the station, and whether they would listen in the future if they did not do so already (see Appendix 1).

3.2 Interpreting the graphs and tables

Both the figures and tables in this report present findings for 'All' respondents and for just those that are based in the 'reach' area of the wider area. The figures for 'All' respondents are based on everyone that was surveyed, including those from the area. The figures for 'total survey area' are based on the people living in the wider area of which Ofcom has defined as the station's reach.

4. Results

This section outlines the findings from the Listener Numbers Survey 2010.

4.1 Demographics

The analysis shows that there were slightly more women (52%, 144) than men (48%, 134) interviewed. The majority of respondents were under 45, which will have biased the sample somewhat. This is despite the fact that the community researchers attempted to obtain an even spread of age groups. Over three quarters of the respondents were under 45 (76%, 214); 8% were under 17, 34% were aged 18 – 25, 22% were aged 26 – 35, and 12% were aged 36 - 45. Of the remaining age groups, 11% were aged between 46 - 54, 7% were aged 56- 65, 6% were aged 65 or over. This profile was comparative to the previous study within one or two percent.

Looking at the geographic spread of respondents, over two thirds lived in the area (70%, 189). A further 25% lived in postcode areas within the county and therefore could potentially receive the FM signal (there have been reports of the station being heard as far as 15 miles from the area although this cannot be considered consistent). The remaining 5% lived

¹ The 'total survey area' for the station is defined by Ofcom as the wider area with a reach of 97,000 people. For the purposes of this research a 'best-fit' model has been used defined by the respondents living in the following postcode areas: XX1 through to XX6 and NR8 through to XX10.

outside of the county but could potentially listen to the station online as this entire group had access to the internet at home.

4.2 Unprompted listenership

Table 1 shows that unprompted station awareness appeared to be dominated by BBC national and local stations and the station, Heart and Kiss. A few other local and national stations were mentioned by respondents but not enough to make an impact. BBC national stations dominated awareness and general and recent listenership, but this was to be expected given that a number of stations were included in that category. Very few people listened to internet only stations.

Table 1 shows that a respectable third of ALL people had mentioned, unprompted, that they had heard of the station and 40% of those from the total survey area (TSA) had heard of the station. Whilst this was the lowest proportion of *awareness* of the local stations broadcasting to the area (which is partly to be expected given that the station is the newest station, although does indicate a potential branding issue), proportions of *listenership* were much more in line with the other local stations. **Of all respondents, a fifth had listened at some point, 16% had listened in the last month and 12% had listened within the last week at the time of the survey and of those from the total survey area, 24% had listened at some point, 19% had listened in the last month and 16% had listened within the last week.**

Unsurprisingly, the stations that reached a bigger audience and had been established for longer were known to more people and had been listened to by more people. However **when focusing on people from the total survey area and their recent listening (within the last month or week) the differences between the numbers who had listened to the local radio stations were marginal** and the station appeared to have a slightly higher proportion of listeners than all the other local radio stations.

Caution should be applied when interpreting this trend, however, due to the higher number of respondents under the age of 45. It is widely known that both these stations probably appeal to an older listenership than the station and this trend was also shown in this study. Whilst both the station and Radio XXX had a higher proportion of listeners aged under 45 than over 45, only 12% of those who listened to the station within the last month were aged over 45 compared to 31% of those who had listened to Radio XXX and over half (54%) of recent BBC XXX listeners were aged over 45. This would indicate that if the age of the sample had been more evenly distributed, the number of the station listeners would have been slightly lower. It is encouraging, however, that proportions of regular listeners were comparative to Kiss which is a radio station aimed at a younger age group, indicating that the station is a serious competitor in the local radio station market, especially for younger audiences.

There were also some interesting differences between gender and station. Stations which seemed to have more regular female listeners included Radio XXX (66% vs 34%), BBC XXX (61% vs 29%), Heart (64% vs 36%), and Kiss (69% vs 31%)². There were no significant

² However this association was only statistically significant with Kiss ($\chi^2=8.651$, $df=1$, $p<0.01$).

differences between proportions of gender and the station (45% vs 55%) and BBC national stations (54% vs 46%).

NB: to see how these results could equate to listening figures in comparison to the radio stations' reach please see section 6.

Table 1: Proportion of all respondents (n=283) and the area (NA) respondents (n=195) who had stated they heard of and listened to radio stations broadcasting to the area when asked unprompted

| | Heard | | Ever listened | | Listened last month | | Listened last week | |
|-------------------------------|------------|------------|---------------|------------|---------------------|------------|--------------------|------------|
| | All | TSA | All | TSA | All | TSA | All | TSA |
| No stations given | 4% | 3% | 4% | 3% | 4% | 3% | 4% | 3% |
| The Station | 32% | 40% | 20% | 24% | 16% | 19% | 12% | 16% |
| Radio XXX | 42% | 45% | 22% | 20% | 13% | 12% | 9% | 7% |
| BBC XXX | 49% | 53% | 26% | 26% | 16% | 17% | 12% | 12% |
| Heart | 59% | 57% | 36% | 32% | 24% | 18% | 18% | 14% |
| Kiss | 37% | 35% | 26% | 21% | 21% | 15% | 16% | 11% |
| BBC National Stations | 66% | 68% | 51% | 53% | 47% | 49% | 41% | 45% |
| Internet Only stations | 4% | 4% | 3% | 2% | 2% | 1% | 1% | 1% |
| Other | 8% | 9% | 4% | 4% | 4% | 4% | 4% | 4% |
| Not stated | 4% | 6% | 0 | 1% | 1% | 2% | 1% | 2% |
| Capital | 0.5% | 0 | 0.5% | 0 | 0.5% | 0 | 0.5% | 0 |
| Classic | 1% | 0.5% | 1% | 0.5% | 1 | 0.5% | 1 | 0.5% |
| Gold | 1% | 1% | 1% | 1% | 0.5% | 0.5% | 0.5% | 0.5% |
| Livewire | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% |
| Magic | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% |
| Planet Rock | 0.5% | 0.5% | 0.5% | 0.5% | 0 | 0 | 0 | 0 |

4.2 Prompted listenership

When prompted 53% (121) of those interviewed claimed that they had heard of the station which is an improvement on the previous 2008 survey where 43% had heard of the station and is a significantly larger proportion than the 17% that had heard of the radio station when the station Public Feasibility Survey was carried out in Autumn 2006. **When only those living in the total survey area are included in the analysis, this proportion rises to 61% (113).** Also worth noting again is the age bias in the sample however, and many more people under 45 had heard of the station than those over 45 when asked unprompted (84% vs 16%)³.

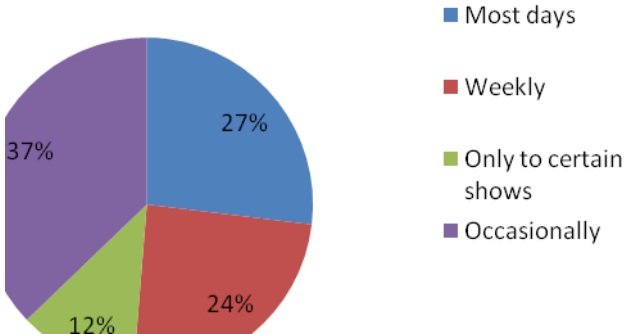
These results are encouraging as they show an increased awareness over the last two years, however the unprompted response was a lot lower than the prompted response suggesting that the station is not the first that come to mind and work could be implemented to raise awareness. However the overwhelming awareness in the younger age group is very positive and empathises the station's appeal to a younger demographic.

³ $\chi^2=9.428$, $df=1$, $p<0.01$

Fifty four percent (78) of those who had heard of the station stated they were currently listening to the station, which is comparative to 2008. Interestingly, this meant that 35% of the whole sample stated they were currently listening which is more than the number who had heard of the station when asked unprompted, let alone stated they had listened. This again demonstrates that most people may not immediately think of the station, but when reminded of it, realise that they have listened to it. This would suggest then need for more brand awareness to be built.

As shown on figure 1, of those who had been listening, the biggest proportion (37%, 29) had only listened occasionally which may explain why the station had not been mentioned by some in the unprompted question. The station is known for its specialist music programming, so it perhaps unsurprising that a small proportion only listened to certain shows (12%, 9). Over half of those that listened were regular listeners in that they listened weekly (24%, 19) or most days (27%, 21). This equates to 14% of the whole sample – 2% more than when asked unprompted.

Figure 1: Listening habits of all respondents who stated that had been listening to the station.



4.3 Not listened to the station

If the respondent said that they had not listened to the station (regardless of whether they had heard of it or not), the community researcher explained a bit about the radio station, such as; it is a community radio station that is principally run by volunteers and its mission is to empower people in the local community. They were also told about some of the music, arts, entertainment and local community shows on offer and given a leaflet. These respondents were then asked whether they think they would listen to the station in the future. The results are shown in Table 2.

Table 2: Whether respondents will listen to the station in the future

| | Respondents | | Total survey area Respondents** | |
|-------|-------------|-------|---------------------------------|------|
| | Number | % | Number | % |
| Yes | 99 | 54% | 60 | 54% |
| No | 9 | 9% | 8 | 7% |
| Maybe | 67 | 37% | 43 | 39% |
| Total | 175 | 100 % | 119 | 100% |

It is very encouraging to find that **over half of the people that do not currently listen to the station said that they would do so in the future** now that they know about it/know more about it, and this is comparative to the 2008 survey. A further 37% stated they might listen and only 9% said they would not listen at all though this is reduced to only 7% of those living in the total survey area.

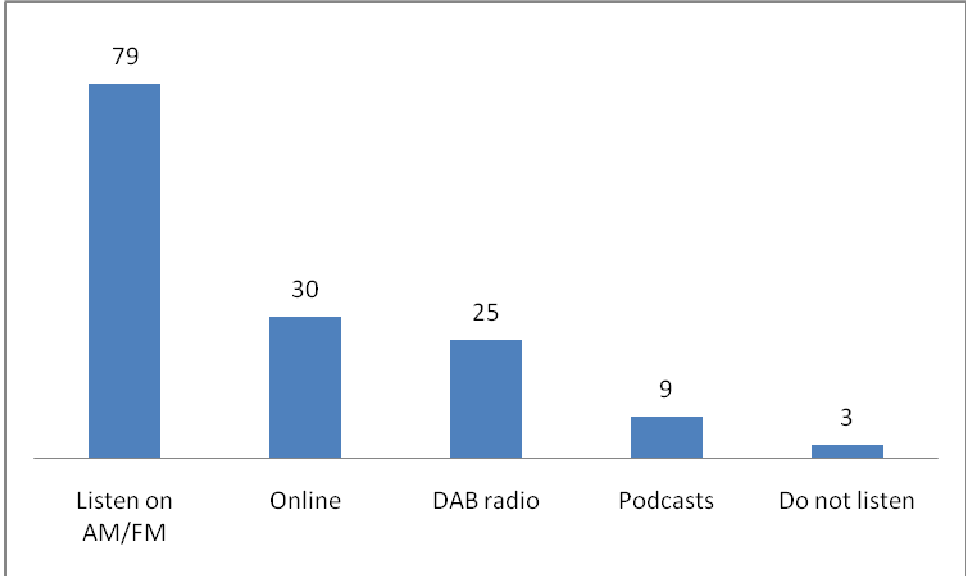
4.4 How people listened to the radio

Figure 2 shows the ways in which respondents listened to the radio generally (not specific to the station). The vast majority of respondents listened on AM or FM signal (79%, 219), almost a third of respondent listened online (30%, 83), a quarter had listened on DAB radio (25%, 68) and a few had listened to podcasts (9%, 24). Very few people didn't listen at all (3%, 8).

There were some interesting associations between age and listening methods. A significantly higher proportion of people over 45 listened via FM/AM signal than those under 45 (75% vs 92%)⁴, whereas a higher proportion of under 45s listened online compared to over 45s (35% vs 12%)⁵. The same trend was found for podcasts (27% vs 19%)⁶. This is perhaps unsurprising given that younger people are generally more accustomed to using the internet. There were no significant associations between age and DAB radio listening. Interestingly, proportionally more men than women listened online (38% vs 23%)⁷.

When focusing solely on respondents who had listened to the station recently (within the last month) trends followed those shown on figure 2, apart from for online listening where 52% (23) listened to radio online, potentially reflecting the younger listenership.

Figure 2: Proportion of respondents and the method of listening to the radio



⁴ $\chi^2=8.891, df=1, p<0.01$
⁵ $\chi^2=12.615, df=1, p<0.01$
⁶ $\chi^2=5.209, df=1, p<0.05$
⁷ $\chi^2=6.543, df=1, p<0.05$

5. Radio listening via the internet and podcasts

The station collects statistics for both the number of people listening to the station via the internet and the number downloading podcasts. Overall the number of online listeners is growing fast. As shown on table 3, the average time people listened to the online streaming increased by just short of a 100% from 3,500 in 2008 (the year the station launched fulltime) to 6,316 so far in 2010. The average number of unique IP addresses accessing the station each month increased over three fold from 2008 (1515), and over two fold from 2009 (2134), to 2010 (4961). The number of podcasts downloaded in 2009 was a very respectable 17,000 and in 2010 so far 9,000 have been downloaded. If the podcasts continue to be downloaded at the same rate, an estimated 21,600 will be downloaded in total by the end of the year, although this is likely to be an underestimate considering the growth in the other types of online listenership.

It is clear from this report that the station draws in a younger audience and, as discussed in the previous section; younger listeners are more likely to listen via online methods compared to those in the older age ranges. Therefore the growth in this type of listenership for the station is perhaps to be expected, however the importance of online listening should not be underestimated. The station should keep the website up to date and ensure that the streaming and podcasts are fully functional at all times.

Table 3: Listening via internet and podcasts for 2008, 2009, 2010

| | 2008 | 2009 | 2010 (data until 05/10) |
|--|-------|--------|------------------------------------|
| Hours of online streaming per month | 3,500 | 5,344 | 6,316 |
| Unique IP address accessing the station each month | 1515 | 2134 | 4961 |
| Podcasts downloads | n/a | 17,000 | 9,000 (so far) Estimated 21,600 |

6. Estimated listener figures

Of those **respondents living in the total survey area 16% had listened within the last week when asked unprompted.** If these figures are extrapolated, using the very basic technique of dividing the number of people that live in the total survey area (97,000) by 100 and multiplying this figure by the proportion of people that regularly listen to the station; we can estimate how many people regularly listen. Based on this calculation **it is estimated that 15,520 people had listened to the station in the last week⁸.** When prompted, 35% of the sample stated that they had been listening at least on an occasional basis, using our basic method this would suggest that there were around 33,950 people tuning in on at least an occasional basis.

RAJAR (Radio Joint Audience Research Limited) produces the official radio audience figures for the radio industry in the UK. This includes figures for the BBC, UK licensed and other commercial stations. RAJAR does not currently produce figures for any community radio

⁸ Ofcom stated the station total survey area reach = 97,000.

station. However, the figures produced by RAJAR can be used to look at trends in the listening patterns for public and commercial stations that broadcast in an area and the RAJAR data can provide context for the station estimated listening figures. As stated previously, results have been reported in this report to take into account respondents who live in the total survey area or 'reach' as described on table 3 and given our rough figures **it is suggested that the station reaches a respectable 16% of its total survey area**. However caution needs to be taken when interpreting our results against the RAJAR as the results presented here for the station are based on a survey of a less than 200 people.

Table 3: Time-series RAJAR figures for March 2007 – March 2009

| | March 2007 | | March 2007 | | March 2009 | |
|-----------|------------|---------|------------|---------|------------|---------|
| | Reach | Reach % | Reach | Reach % | Reach | Reach % |
| Radio XXX | 35,000 | 7% | 39,000 | 8% | 46,000 | 14% |
| Heart | 190,000 | 31% | 181,000 | 29% | 192,000 | 30% |
| BBC XXX | 227,000 | 32% | 204,000 | 28% | 192,000 | 25% |
| Kiss FM* | 264,000 | 14% | 277,000 | 14% | 336,000 | 16% |

The 'Reach' is the number of adults (aged 15+) who listen to more than five minutes of the radio station within a week. However, the five minutes must be within a fifteen minute period. The 'Reach %' is the proportion of people that listen in the 'Total Survey Area'; that is, the area which the station broadcasts to as defined by the Ofcom licence or by the station.

7. Conclusions

The findings show that the station is a competitor in the local radio station market with comparative listener proportions to the other stations broadcasting to the area. The findings suggest that the station appeals to a younger audience than most of its competitors. There is some suggestion that listenership has grown since the previous 2008 survey (by 10%), however due to changes in methodology and the area definitions a direct comparison is not possible and has to be interpreted with caution. Online listenership continues to grow significantly and is an important area for the station especially considering the younger age profile of listeners. Despite having comparative (and in some cases better) listener proportions, the station had the lowest proportion of people that had heard of the station. This is to be expected given that the station is the newest station in the region and possibly has the lowest marketing budget as it is a community rather than commercial station. Most people who had heard of the station also listened, therefore if the station could increase public awareness, listenership may also increase. This bodes well for the forthcoming re-launch.

8. Recommendations

Listed below are number of recommendations that emerged from the findings and about the research methodology itself.

- The findings suggest the need for more off-air promotion about the station, its purpose and the content and timing of the shows.
- It might be useful to market the specialists show to selected audiences, for example on specialist club nights, at events, or through online communities.

- Staff, volunteers and regular listeners should be actively encouraged to get involved in promoting the station, again explaining the range of programmes on offer, as word of mouth is one of the best sources for gaining new listeners.
- The station website should continue to be easy to use and be kept up-to-date.
- Online streaming and podcasts should continue to be easy to access and function properly.
- The possibility of a quota sampling approach should be explored to better reflect the area demographic.