

May 2015

ABC Appreciation Survey – Summary Report

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1. Executive summary

Background

The objective of the Appreciation Survey is to provide an overview of community *attitudes and opinions* about the ABC - as distinct from the detailed *behavioural* information provided by television, radio and online ratings. The most recent wave was fielded nationally by telephone in May 2015, among 1,913 people aged 14 years and over.

Overview

As found in all previous waves of the survey, a large majority of Australians believe the ABC performs a valuable role (84 percent). A large majority also continue to believe it provides quality content, and that it is doing a good job satisfying its charter obligations.

Although over several years there's been a *very gradual*, small loss in the number of Australians who believe the ABC and its services are valuable, the 2015 waves finds no further change. Overall attitudes to ABC TV and ABC Radio have been relatively consistent over the last four or five waves.

In contrast, while 2008-2011 saw a large increase in positive perceptions about *commercial* TV, they have been gradually declining since 2011, and have declined a little further this year.

Although the attitudes of people aged 50+ remain more positive about ABC TV and ABC Radio than their commercial equivalents, the gap has generally been narrower in the last four or five waves. However at least for ABC TV, the gap has widened a little in 2015 due to a drop in positive perceptions about commercial TV.

Overall value of the ABC

Eighty four percent of Australians believe the ABC provides a valuable service to the community, and close to half believe it provides a *very* valuable service.

Overall community sentiment is consistent with last year, following a pattern of subtle decline since 2006.

Television

Most Australians (78 percent) remain of the view that ABC TV provides *quality* programming, and two-thirds feel it does a 'good job' in terms of *the number of shows it provides they personally like to watch*.

For commercial TV, the 2015 survey finds a continued gradual decline in community sentiment about the quality and quantity of content it provides. This trend has been evident since 2011.

Australians continue to have a more favourable view about ABC TV than commercial TV. Overall attitudes about ABC TV have been relatively consistent over the last four waves following a period of gradual decline in positive sentiment towards it (more particularly in relation to the amount of appealing content it provides rather than the quality of its content).

Nonetheless as noted in last year's report, recent years have seen a shift in attitudes among people aged 50+. Between 2011 and 2014 although this group remained far more positive about ABC TV than commercial TV, the gap had narrowed quite substantially. The gap has widened a little this year with a drop in sentiment about commercial TV, however it remains well below pre-2010 levels.

1. Executive summary (cont'd)

Similar patterns have been evident among people aged 35 to 49, but the narrowing of the gap has been far less pronounced than for people aged 50+.

Radio

Sixty two percent of Australian adults believe the ABC provides good *quality* radio programming (only 13 percent feel it is poor), and 57 percent believe ABC Radio does a 'good job' in terms of the amount of programming it provides that they personally '*like to listen to*' (only 17 percent feel ABC Radio does a poor job).

Attitudes concerning ABC Radio have been fairly consistent over the last few waves. However, since 2012 there's been a small increase in the number of people who feel ABC Radio provides *poor* quality content.

Reflecting patterns in TV, among people aged 50+ the last four waves have seen a narrower gap in perceptions between ABC Radio and commercial radio than was previously the case. On the other hand, among people aged 25 to 34, the last three waves have seen a greater positive gap in relation to the perceived quality of ABC radio content vs. commercial radio content.

Online

Forty percent of Australians claim to *ever* use the ABC website or online services, even if only occasionally, and 22 percent say they do so *at least once a week*. Users of the website and online services are largely sourced from people who are also heavy or medium users of either ABC TV or ABC Radio.

The vast majority of users (around 90 percent) feel ABC the website and online provide quality content, and do a 'good job' in terms of the *amount* of relevant content they provide.

Coverage of country news and information

Community perceptions about coverage of country news and information remain far more favourable for the ABC than for commercial media - both among people in capital cities and people in country/regional areas.

Eighty percent of Australians believe the ABC does a 'good job' covering country/regional issues compared with 42 percent for commercial media (down from 46 percent last year).

Other specific charter obligations

The majority of Australians remain of the view that the ABC is doing 'a good job' in meeting its various other charter obligations, and results this year are generally very consistent with last year's.

The only significant change is a small rise (after a dip last year) in the number of Australians who believe the ABC does a *very good* job of being balanced and even handed when reporting news and current affairs. Yet at the same time, compared with two years ago, there has also been a small increase in the number who feel the ABC does a *poor* job on this issue.

Over the same two year period, there has a small increase in the number of Australians who believe the ABC does a *poor* job:

- broadcasting programs that are different from commercial television or radio;
- being distinctively Australian; and,
- broadcasting programs that reflect Australian cultural diversity.

2. Background and objectives

This report presents findings from the 2015 ABC Appreciation Survey, which follows similar studies conducted in 1998, 1999, and annually from 2002 to 2014. The objective of the research is to provide an overview of community attitudes about the ABC - as distinct from the detailed behavioural information provided by television, radio and online ratings.

Specifically, the research explored community attitudes and perceptions about:

- the overall value of the ABC and its services to the Australian community;
- the quality of programming on ABC Television and Radio;
- the extent to which ABC Television and Radio offer programming people like to watch, or listen to;
- usage of, and attitudes towards the ABC website and online services;
- the ABC's coverage of country news and information;
- the extent to which the ABC fulfils various other charter obligations;
- the even-handedness of ABC news and current affairs reporting.

As a point of comparison, and to assist interpretation of results, attitudes and perceptions were also measured in relation to commercial media on a number of dimensions.

TV viewing and radio listening were also collected for cross-analysis purposes.

3. Methodology

The research was conducted nationally, by telephone, among 1,913 respondents aged 14 years and over. Fieldwork was conducted over the period May 22-31, 2015, by fully trained and personally briefed interviewers.

Respondents were selected by a stratified random sample process which included:

- a quota being set for each capital city and non-capital city area, and within each of these areas, a quota being set for groups of ABS Level 4 Statistical Areas;
- random selection of household telephone numbers
- random selection of an individual in each household.

To ensure the sample included those people who tend to spend more time away from home, a system of call backs and appointments was incorporated. Results were post-weighted to ABS data on age, highest level of schooling completed, sex and area.

Heavy, Medium and Light/non-users of ABC services

In order to explore attitudes according to people’s *usage* of ABC services, the sample was segmented into heavy, medium and light/non ABC users.

The segments were constructed based on respondent’s own assessment of how much time they spend watching ABC TV, or listening to ABC Radio (i) on an average weekday and (ii) on an average weekend day. Although in absolute terms these self-assessments may not be particularly accurate, they are adequate for the purposes of a broad segmentation. The following definitions were used:

	Amount of time spent viewing/ listening	ABC TV viewing segments % of 14+ population	ABC Radio listening segments % of 14+ population
Heavy	6+ hours a week	32	21
Medium	<6 hours a week	42	28
Light/non	0 hours a week	26	51

People who report that they do not spend any time watching/ listening to ABC TV/Radio on an *average* day, may still watch/ listen *periodically*. Consequently those who claim to watch “0” hours have been categorised as ‘Light/non’ users.

A segmentation based on a combination of ABC TV and Radio usage was subsequently derived as follows:

		%
Heavy	either heavy viewer of ABC TV or heavy listener of ABC Radio	41
Medium	medium ABC TV or ABC Radio user, but not heavy user of either	40
Light/non viewers / listeners	not heavy or medium user of either ABC TV or Radio	20

3. Methodology

A final segmentation incorporating ABC TV, Radio and the ABC website/online services was derived as follows:

		%
Heavy	heavy ABC TV/ Radio user or use ABC website/ online 4-6 days a week or more often	43
Medium	medium ABC TV/ Radio user or use ABC website/ online 1-3 days a week but not heavy user of any	38
Light/non users	not heavy or medium user of ABC TV/ Radio or website/ online	18

Changes to question wording

Over the years the ways in which people may consume ABC TV or ABC Radio content have expanded to include online and mobile platforms, and the number of ABC TV channels has also grown. Consequently from 2013, the questions concerning usage of ABC TV and ABC Radio have included expanded descriptions as follows:

*Now a question about **ABC** television. These days the ABC has a number of different TV channels, and you can watch them on your TV, or you can watch them online.*

*Now a question about listening to **ABC** radio stations - which could include listening to them on a radio, a computer, tablet or mobile phone.*

In 2015, questions concerning the ABC website were also expanded to include 'online services'.

Statistical significance testing

Throughout the report, where relevant, statistically significant changes have been noted. All significance tests have been based on the 95 percent level of confidence. This means that if a change is noted as being statistically significant, there is a 95 percent probability that a *real* change has occurred, and is not simply due to chance variation between waves.

4. Research findings

4. Research findings

4.1 Overall value of the ABC

A large majority (84 percent) of Australians continue to believe the ABC provides a 'valuable' service to the community, and close to half regard it as being a *very* valuable service (Figure 1).¹ Overall community sentiment is very consistent with last year, following a pattern of very subtle decline since about 2006. However the 2015 does find a *very* small increase (from 3 to 5 percent) in the number of Australians who feel the ABC and its services are 'not at all valuable'.

A generally positive view about the value of the ABC continues to be shared by men and women, all age groups and both capital city and country / regional residents. Also consistent with previous surveys, belief in the value of the ABC is correlated with *usage* of ABC services. For example:

- among heavy ABC Television / Radio/ online users, 94 percent believe the ABC and its services are 'valuable', (including 62 percent who think it is '*very*' valuable);
- while 57 percent of light/non-users believe it is 'valuable' (including 15 percent '*very*' valuable).

Related to this, a belief that the ABC is *very* valuable tends to increase with age, though drops off among those aged 50+ (Figure 2).

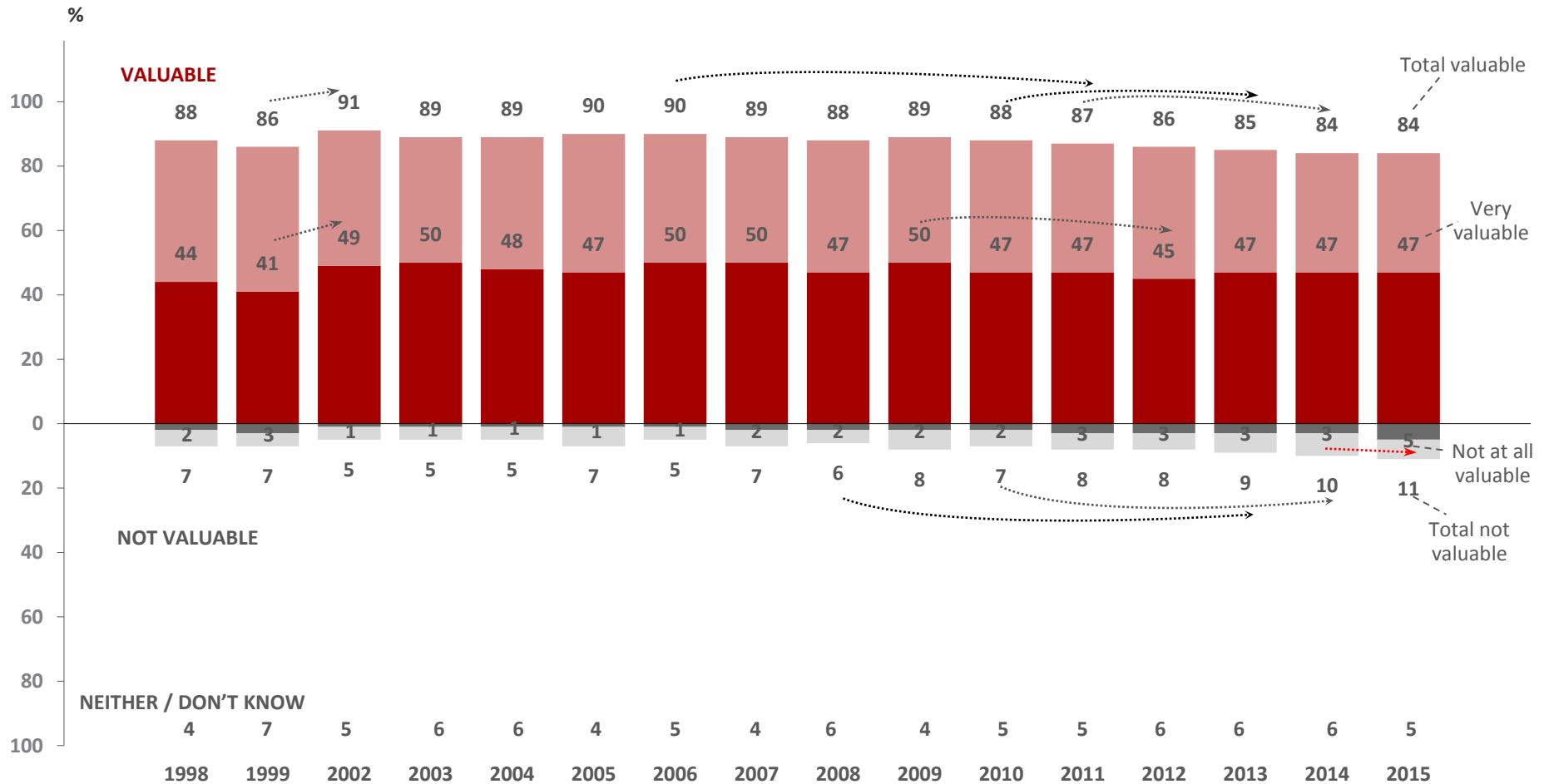
Last year's report noted that the small drop in positive sentiment about the ABC between 2011 and 2014 had been primarily driven by less positive attitudes among people aged 50+. The current survey finds no further drop among this age group.

However compared with a few years ago, negative sentiment about the value of the ABC is a little higher among women and also Light/ Non users of ABC services. Conversely more males now rate the ABC and its services as being *very* valuable compared with 2012.

1. In 2002-2015, the survey was conducted in May/ June, but the 1998 and 1999 surveys were conducted in December. Moreover unlike the 1998 and 1999 surveys, in the 2002-2014 waves, the 'value' question included reference to the ABC website, and in 2015 reference to the website and online services. It is unknown if these differences in timing or question wording had any impact on results.

Overall value of the ABC*

Thinking now about the ABC overall, including ABC Television, Radio and the ABC website and online services. Overall, how would you rate the value of the ABC and its services to the Australian community? Would you say it is ...?



* Mention of the ABC website was included from 2002. The phrase 'online services' was added in 2015

■ VERY VALUABLE ■ QUITE VALUABLE ■ NOT AT ALL VALUABLE ■ NOT VERY VALUABLE

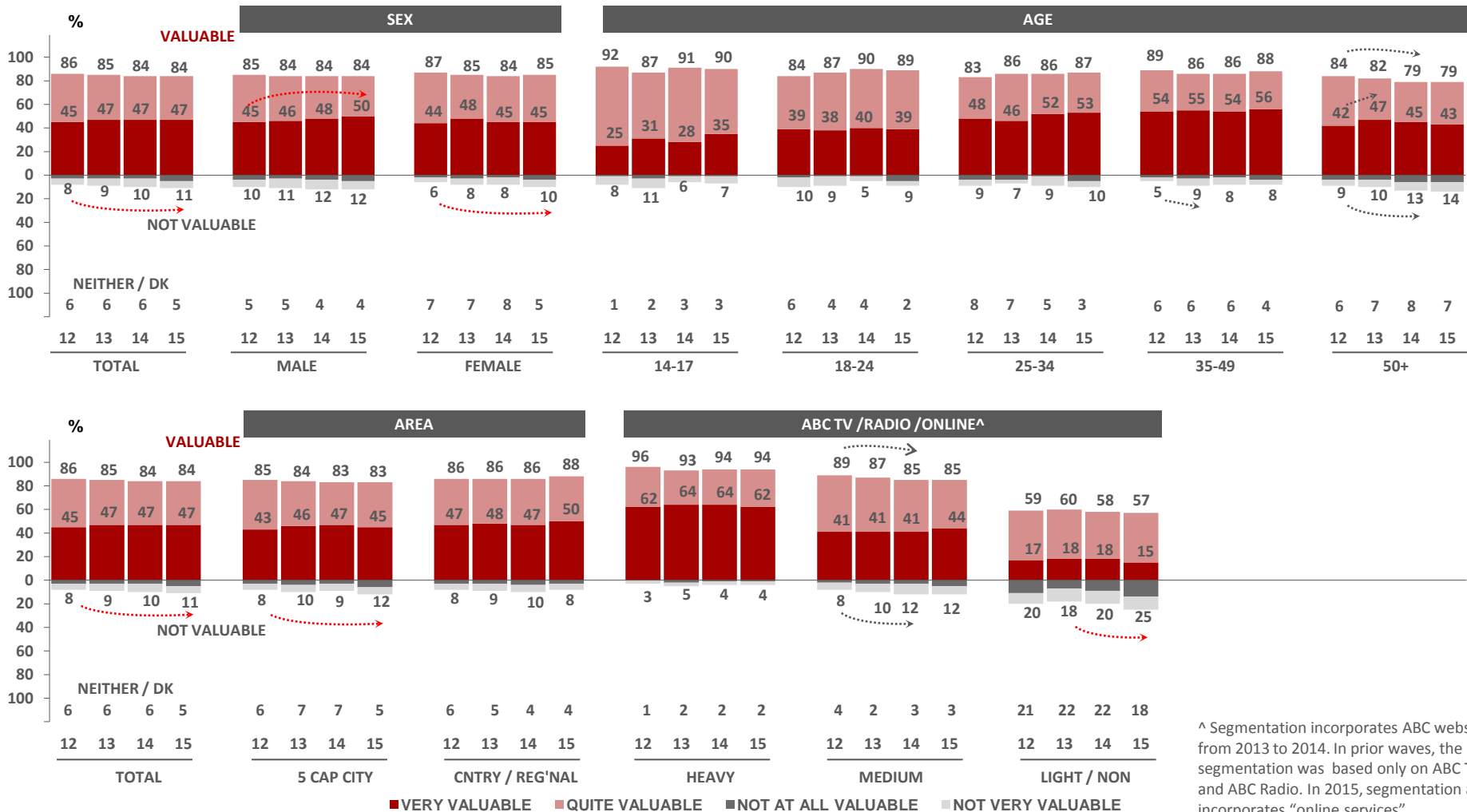
FIGURE 1

BASE: AGED 14+ NATIONALLY (n=1290, 1900, 1900, 1900, 1900, 1900, 1900, 1903, 1902, 1900, 1905, 1904, 1908, 1903, 1902, 1913)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

Overall value of the ABC

Thinking now about the ABC overall, including ABC Television, Radio and the ABC website and online services. Overall, how would you rate the value of the ABC and its services to the Australian community? Would you say it is ...?



^ Segmentation incorporates ABC website from 2013 to 2014. In prior waves, the segmentation was based only on ABC TV and ABC Radio. In 2015, segmentation also incorporates "online services".

BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY / REGIONAL (n=815, 813, 814, 818); ABC TV / RADIO / ONLINE: HEAVY (n=834, 895, 899, 932), MEDIUM (n=737, 687, 694, 684), LIGHT / NON (n=337, 321, 309, 297)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

FIGURE 2

4.2 Television

4.2.1 Quality of programming

A large majority of Australians (78 percent) believe the *quality of programming* on ABC Television is 'very' or 'quite good'. Following a small decline in positive sentiment between 2009 and 2012¹, perceptions have remained fairly consistent in the four most recent waves.

However sentiment about the quality of commercial TV has dropped a little compared with two years ago, and currently 40 percent of adults describe the quality of commercial TV as 'good', compared with 44 percent in 2013, and 51 percent at its peak level in 2011. Conversely, 52 percent describe the quality as 'poor'.

Consequently overall, there continues to be a far stronger association of 'quality' content with ABC TV rather than commercial TV.

Analysis among demographic segments shows the drop in positive sentiment for commercial TV over the past two years is evident (even if it is not always statistically significant) among both men and women, people who live in capital city and country/ regional areas, and those aged 18 to 24, 25 to 34 and 50+.

For ABC TV:

- Among Heavy ABC TV viewers, perceptions about the quality of ABC TV are a little less positive compared with two years ago.
- Among people aged 18 to 24, the overall level of positive sentiment is higher than a few years ago, but the number who describe the quality as being *very good* has dropped in the past 12 months.

1. The 2009 to 2012 decrease in positive sentiment about the quality of ABC TV was *not* reflected in a commensurate increase in *negative* sentiment, but rather an increase in those who did not have a view about ABC TV.

Television - Quality of programming

Based on your own experience, or what you may have seen or heard, overall do you think the quality of programming on... (TYPE) is good or poor?

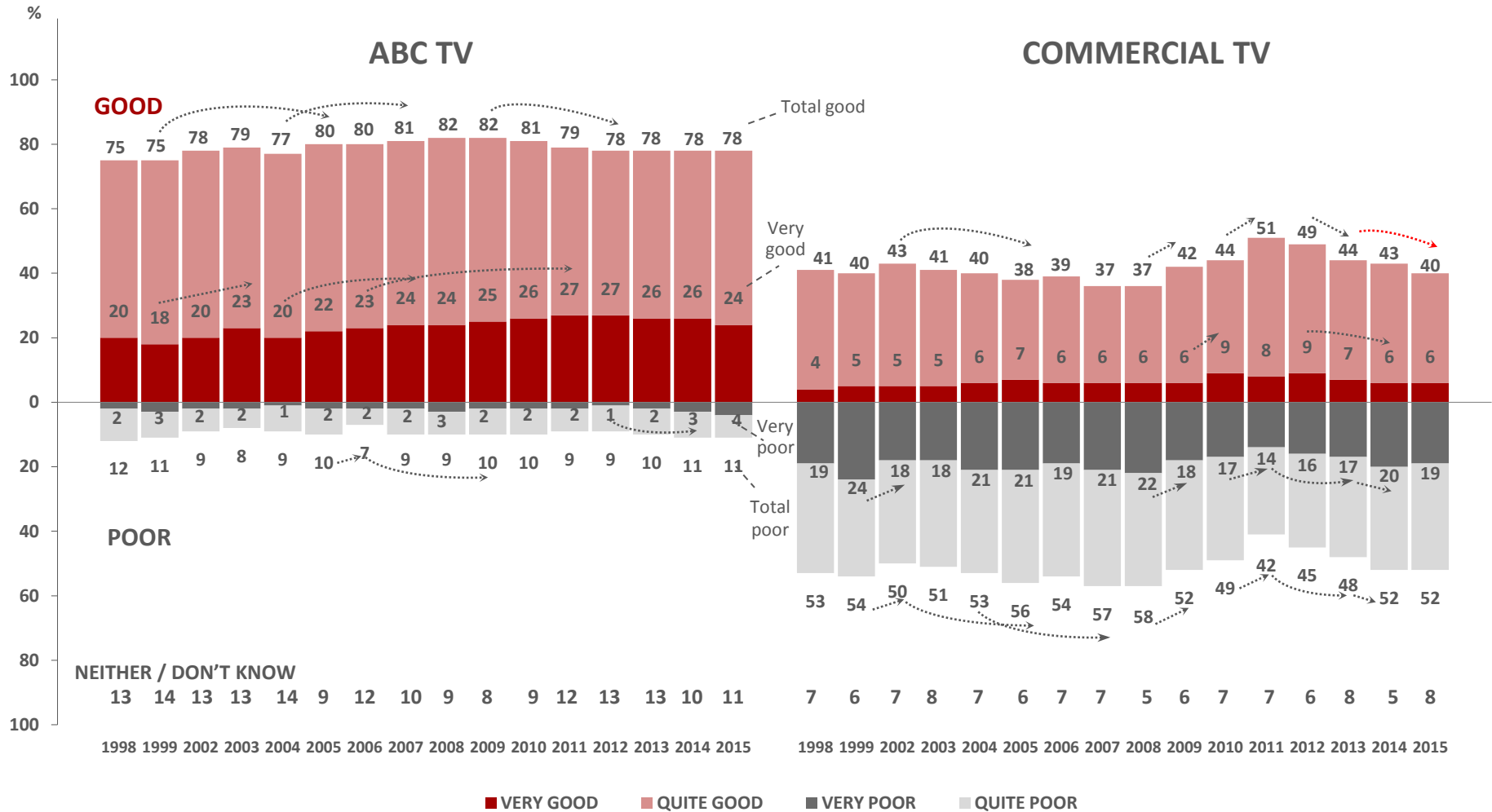


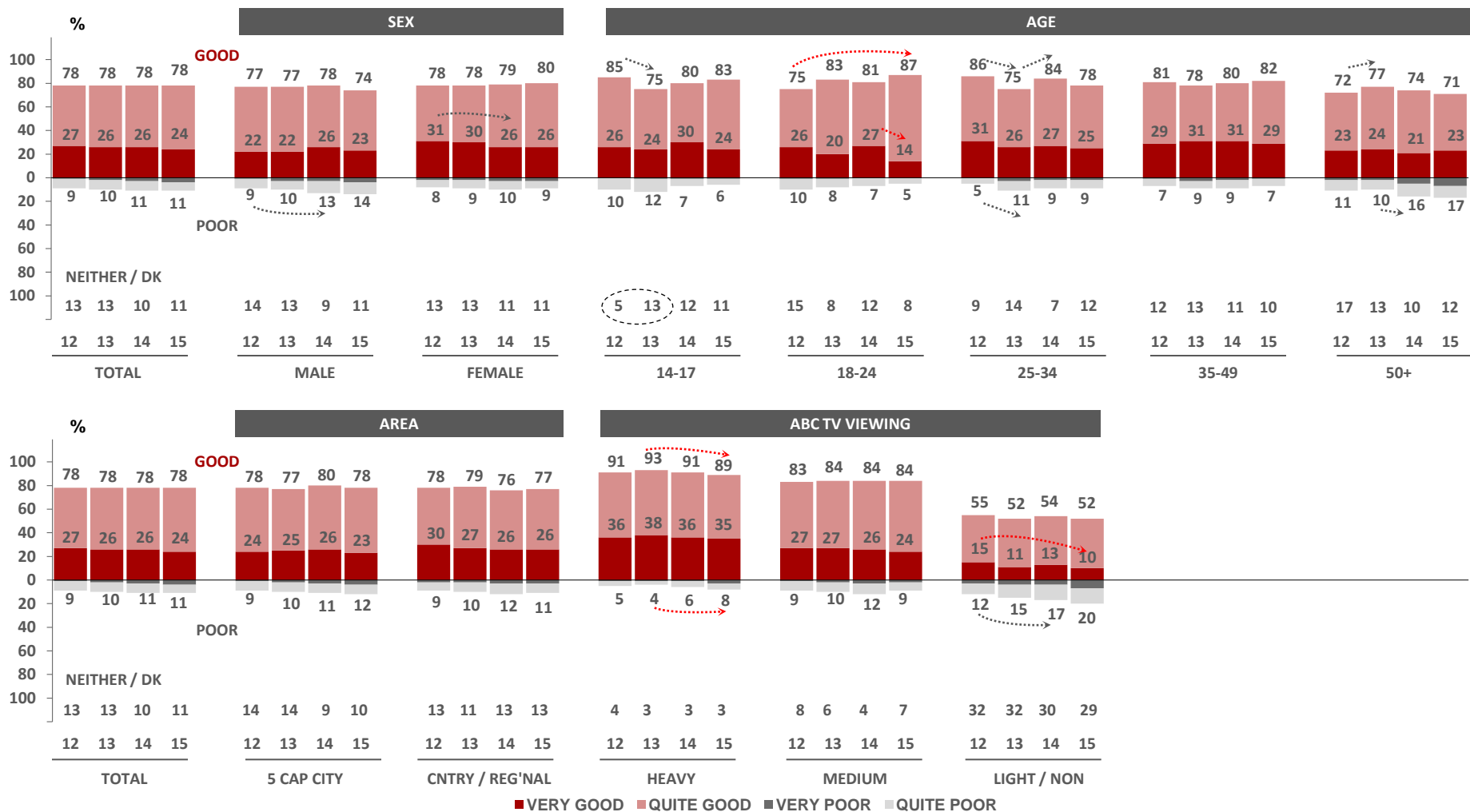
FIGURE 3

BASE: AGED 14+ NATIONALLY: TOTAL (n=1290, 1900, 1900, 1900, 1900, 1900, 1900, 1903, 1902, 1900, 1905, 1904, 1908, 1903, 1902, 1913)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

ABC Television - Quality of programming

Based on your own experience, or what you may have seen or heard, overall do you think the quality of programming on ABC Television is good or poor?



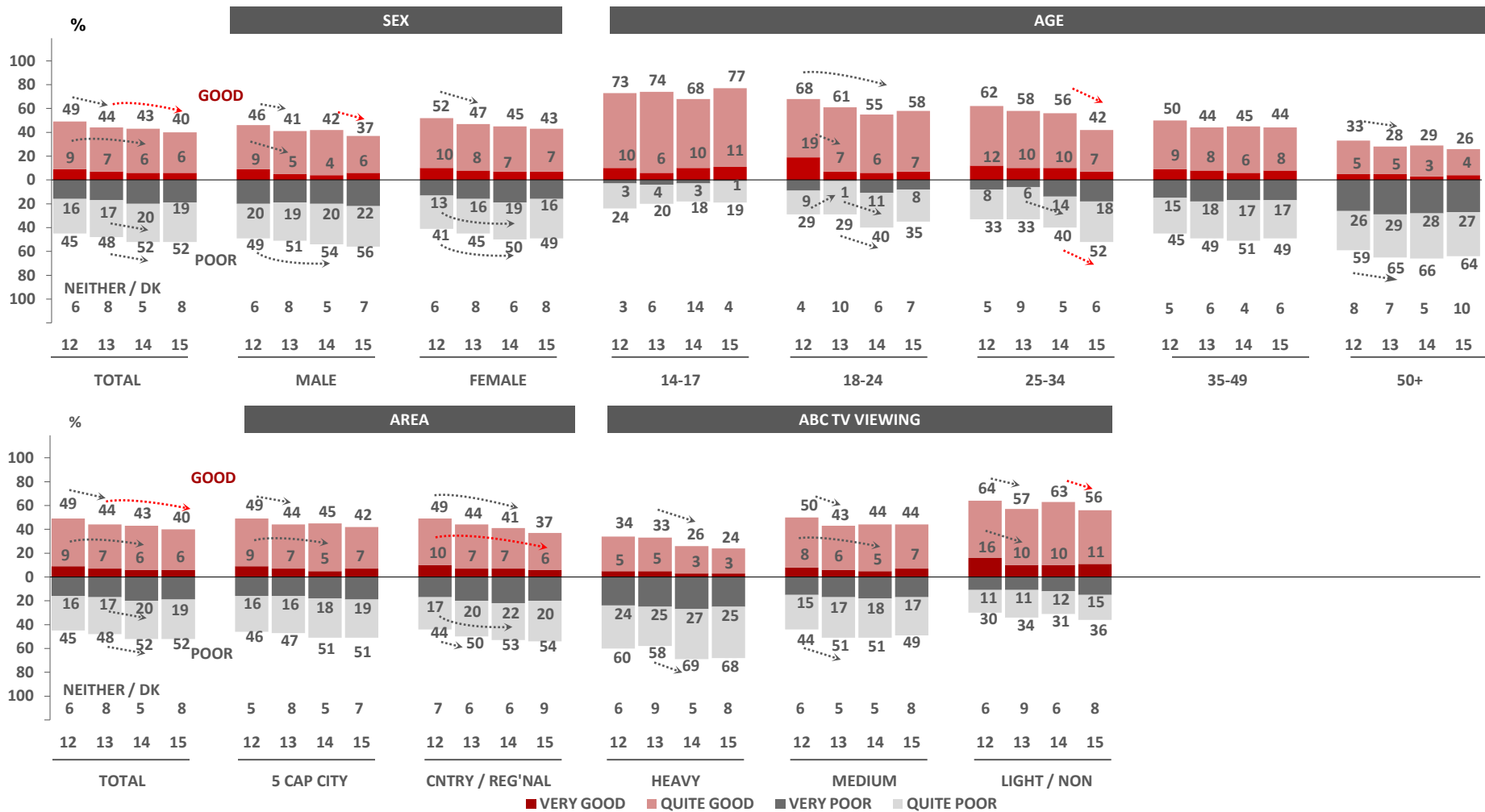
BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY/ REGIONAL (n=815, 813, 814, 818); ABC TV VIEWING: HEAVY (n=620, 634, 672, 700), MEDIUM (n=811, 776, 761, 769), LIGHT / NON (n=477, 493, 469, 444)

Statistically significant change:
Noted prior to 2015 wave →
Noted with 2015 wave →

FIGURE 4

Commercial Television - Quality of programming

Based on your own experience, or what you may have seen or heard, overall do you think the quality of programming on commercial television is good or poor?



BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY/ REGIONAL (n=815, 813, 814, 818); ABC TV VIEWING: HEAVY (n=620, 634, 672, 700), MEDIUM (n=811, 776, 761, 769), LIGHT / NON (n=477, 493, 469, 444)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

FIGURE 5

4.2 Television (cont'd)

4.2.2 The number of shows people like to watch

In terms of the number of shows they personally like to watch, two-thirds of Australians believe ABC TV does a 'good job', compared with 42 percent for commercial TV¹ (Figure 6).

Reflecting patterns in perceptions about quality, the level of positive sentiment about the volume of appealing content on commercial TV has generally been trending down since 2011, and this year sees a further decrease from 48 percent to 42 percent. The number who feel commercial TV does a poor job is now 51 percent. This means attitudes about commercial TV are now almost back to the same level they were at their lowest point in 2007. Even if it is not always statistically significant, there is evidence of a drop in positive sentiment over the last 12 months in every segment apart from people aged 14 to 17.

For ABC TV, overall public sentiment has been quite consistent over the last four waves, following a period of gradual decline in the level of positive sentiment between 2005 and 2012.

Looking at attitudes towards ABC TV amongst demographic segments:

- During 2011-2015 the number of people aged 50+ who felt ABC TV does a 'good' job at providing shows they like to watch has levelled off at around 70 percent after a decline from figures historically closer to 80 percent. Although sentiment among people aged 50+ is far more positive for ABC TV than commercial TV, the gap had been narrowing since about 2008. However it has widened again this year with the drop in positive attitudes towards commercial TV.
- Similarly, the gap in sentiment had also been narrowing among 35 to 49 year olds, however it has widened again this year.

1. This finding is perhaps surprising given audience ratings for ABC TV vs commercial TV. However we believe respondents answer this question relative to their expectations, and the role they have for ABC Television and commercial television in their lives. For example, a person may mainly use the ABC for news or current affairs, and believe it delivers. In their mind, the ABC provides quality content, and does a good job at providing the number of shows they like to watch. The same person may turn to commercial television for light entertainment - and in fact they spend more time watching light entertainment than anything else. But they may complain 'there's nothing worth watching', and so, the commercial networks fall short of their expectations.

Television - Number of shows you like to watch

And overall would you say ... (TYPE) does a good job, or a poor job, in terms of the number of shows it provides that you personally like to watch?

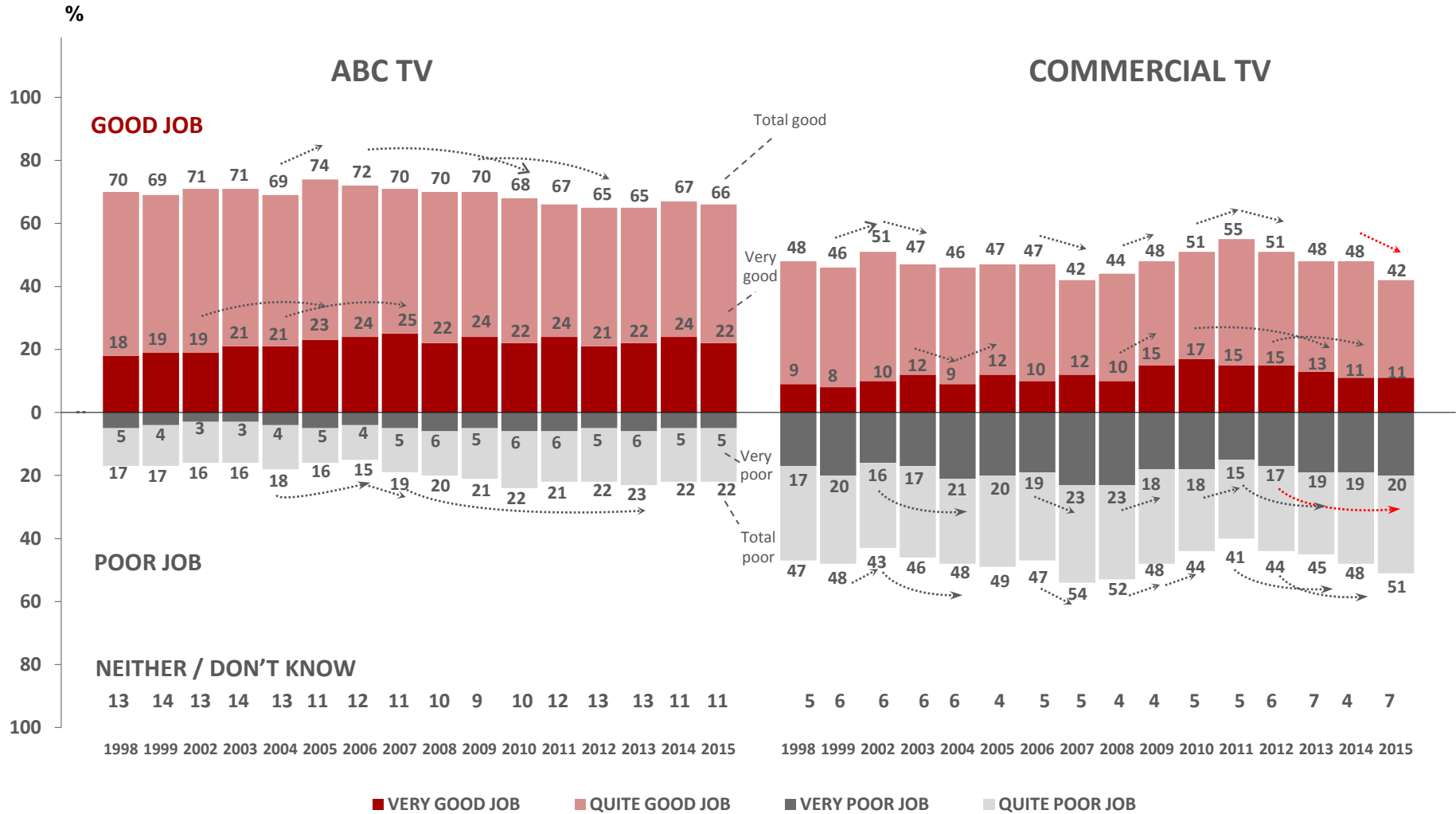


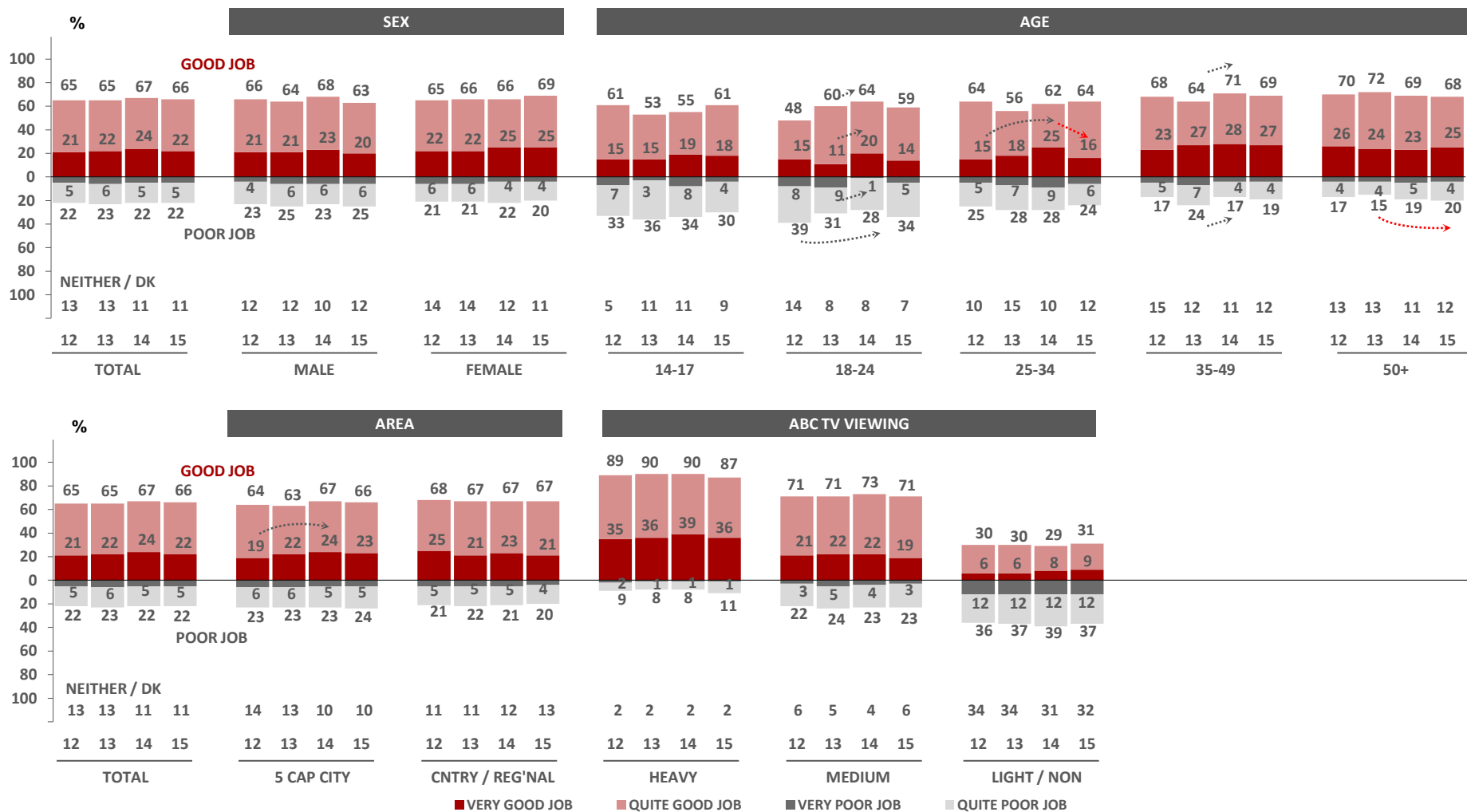
FIGURE 6

BASE: AGED 14+ NATIONALLY: TOTAL (n=1290, 1900, 1900, 1900, 1900, 1900, 1903, 1902, 1900, 1905, 1904, 1908, 1903, 1902, 1913)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

ABC Television - Number of shows you like to watch

And overall would you say ABC Television does a good job, or a poor job, in terms of the number of shows it provides that you personally like to watch?



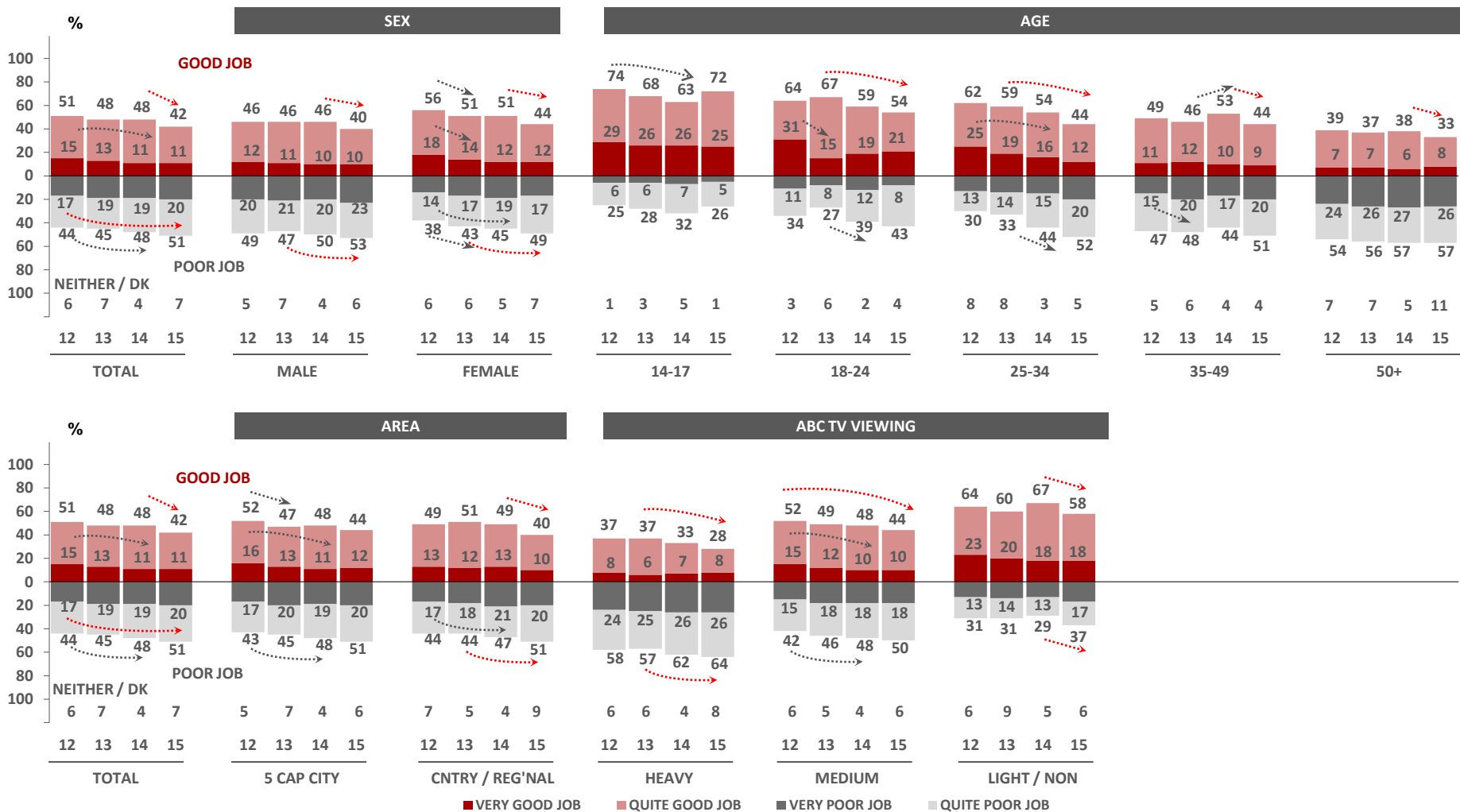
BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY / REGIONAL (n=815, 813, 814, 818); ABC TV VIEWING: HEAVY (n=620, 634, 672, 700), MEDIUM (n=811, 776, 761, 769), LIGHT / NON (n=477, 493, 469, 444)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

FIGURE 7

Commercial TV - Number of shows you like to watch

And overall would you say commercial television does a good job, or a poor job, in terms of the number of shows it provides that you personally like to watch?



BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY / REGIONAL (n=815, 813, 814, 818); ABC TV VIEWING: HEAVY (n=620, 634, 672, 700), MEDIUM (n=811, 776, 761, 769), LIGHT / NON (n=477, 493, 469, 444)

Statistically significant change:
 Noted prior to 2015 wave
 Noted with 2015 wave

FIGURE 8

4.3 Radio

4.3.1 Quality of programming

There continues to be a greater similarity in Australians' overall perceptions about the quality of ABC vs commercial *radio* than in their perceptions about the quality of ABC vs commercial *television*. Sixty two percent describe the quality of ABC Radio programming as 'good' (13 percent feel it is poor), while 51 percent feel commercial radio offers good quality programming (and 33 percent feel it is poor) - Figure 9.

Perceptions about ABC Radio have been reasonably consistent over the last five waves after a drop from the unusually high levels of 2009 and 2010¹. However, although the number of people who have a positive view about the quality of ABC content has remained relatively unchanged, since 2012 there has been a small, gradual increase in the number who feel the quality is *poor* – and this has mainly come from people who were previously uncommitted in their opinion.

Perceptions about commercial radio have also been generally consistent, though there has been a slightly higher level of negative sentiment about its quality between 2013 and 2015 compared with the previous two years.

Within demographic segments:

- The small, gradual increase in the number who have negative perceptions about the quality of ABC Radio is evident in several segments, even if it is not always statistically significant (men, women, Heavy, Medium and Light/ Non ABC Radio listeners, and people aged 18-24, 35 to 49 and 50+).
- Positive sentiment about ABC Radio has decreased among 35 to 49's after a rise last year, but this just appears to be part of an 'up then down again' pattern evident in recent waves.

- Among 25 to 34's, positive sentiment is up significantly on three years ago – though the 2012 level was unusually low. At the same time, over the last three waves, perceptions about the quality of *commercial* radio among 25 to 34's have been at their lowest recorded in the tracking series. Consequently during 2013-2015, *relative* perceptions about ABC Radio vs. commercial radio among this age group have been the most favourable for some time.

1. As discussed in previous reports, the higher level in 2009 appeared related to ABC Radio's coverage of the fire and flood disasters of that year.

4.3 Radio

4.3.1 Quality of programming (cont'd)

- However among people 50+, the opposite is true. On average, over the last four waves, the gap between ABC Radio and commercial radio has been its narrowest for some time.

The loss in positive sentiment about the quality of ABC Radio is because of a combination of two things: (i) a slight increase in the number of people who feel ABC Radio offers *poor* content, and (ii) fewer people aged 50+ have any view about it at all. As noted in last year's report, this relates to a loss of behavioural connection with ABC Radio. *[Appreciation surveys over 2011 to 2015 have seen, based on peoples' claimed listening behaviour, an increase in the absolute number categorised as 'light/non' listeners of ABC Radio, and a reduction in those categorised as 'heavy' listeners – and this has been most evident among people aged 50+] ¹.*

1. See Section 3, Methodology, for a description of how the heavy, medium and light/non listening segments are derived.

Radio - Quality of programming

Based on your own experience, or what you may have seen or heard, overall do you personally think the quality of programming on... (TYPE) is good or poor?

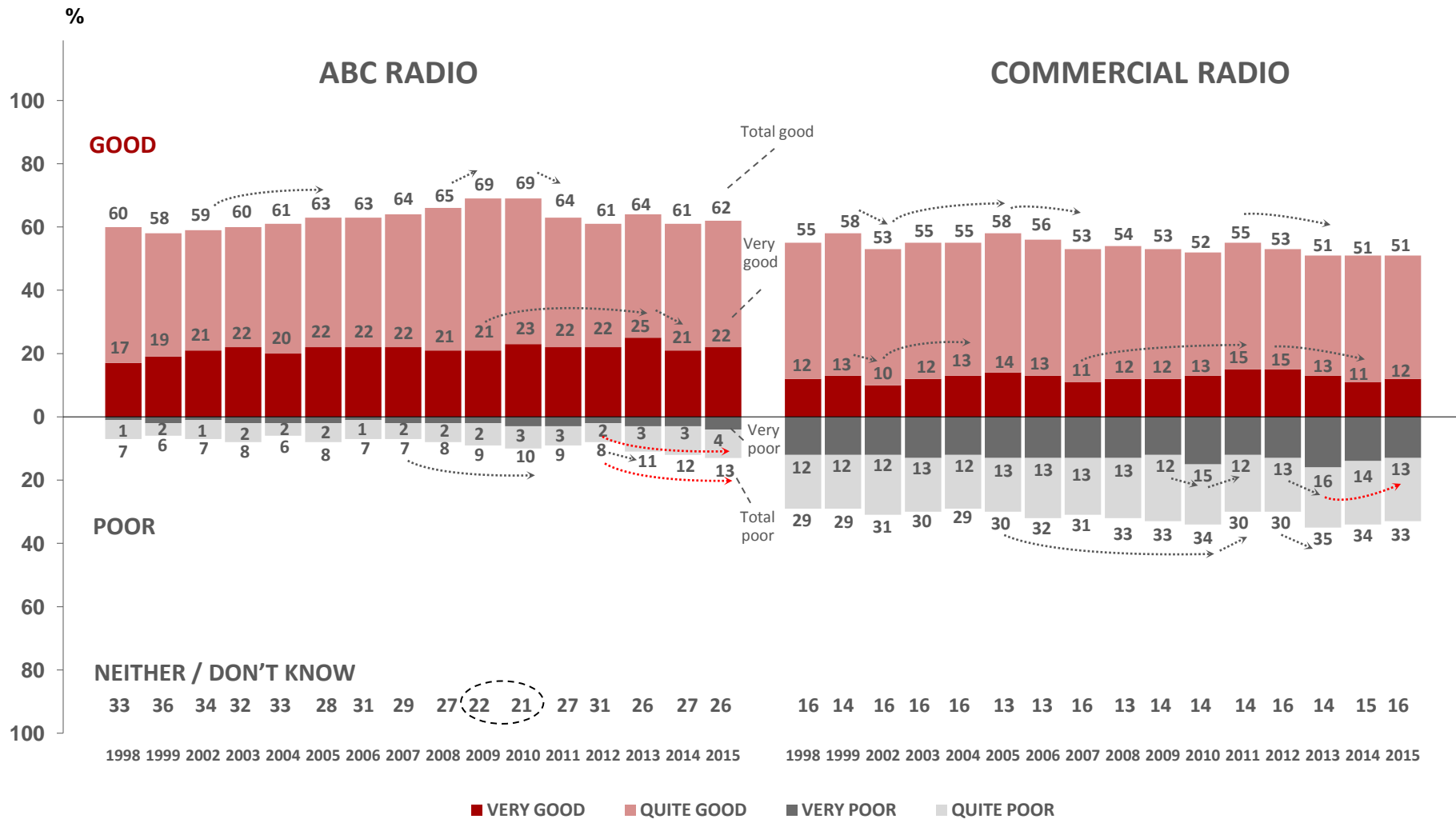


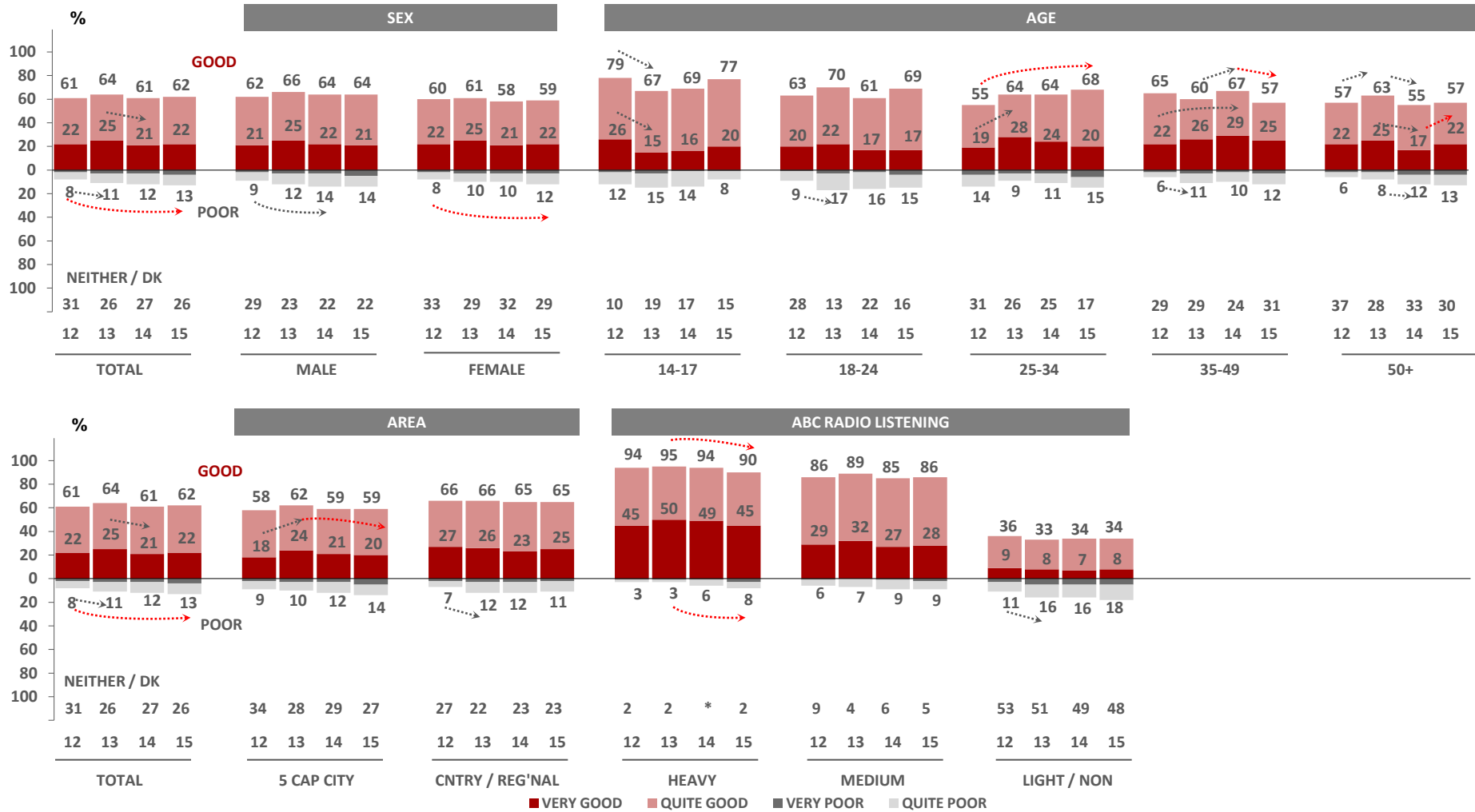
FIGURE 9

BASE: AGED 14+ NATIONALLY: TOTAL (n=1290, 1900, 1900, 1900, 1900, 1900, 1900, 1903, 1902, 1900, 1905, 1904, 1908, 1903, 1902, 1913)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

ABC Radio - Quality of programming

Based on your own experience, or what you may have seen or heard, overall do you personally think the quality of programming on ABC Radio stations is good or poor?



* LESS THAN 0.5 PERCENT

BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY/ REGIONAL (n=815, 813, 814, 818); ABC RADIO LISTENING: HEAVY (n=472, 472, 454, 447), MEDIUM (n=534, 548, 555, 604), LIGHT / NON (n=902, 883, 893, 862)

Statistically significant change:
 Noted prior to 2015 wave
 Noted with 2015 wave

FIGURE 10

Commercial Radio - Quality of programming

Based on your own experience, or what you may have seen or heard, overall do you personally think the quality of programming on commercial radio stations is good or poor?

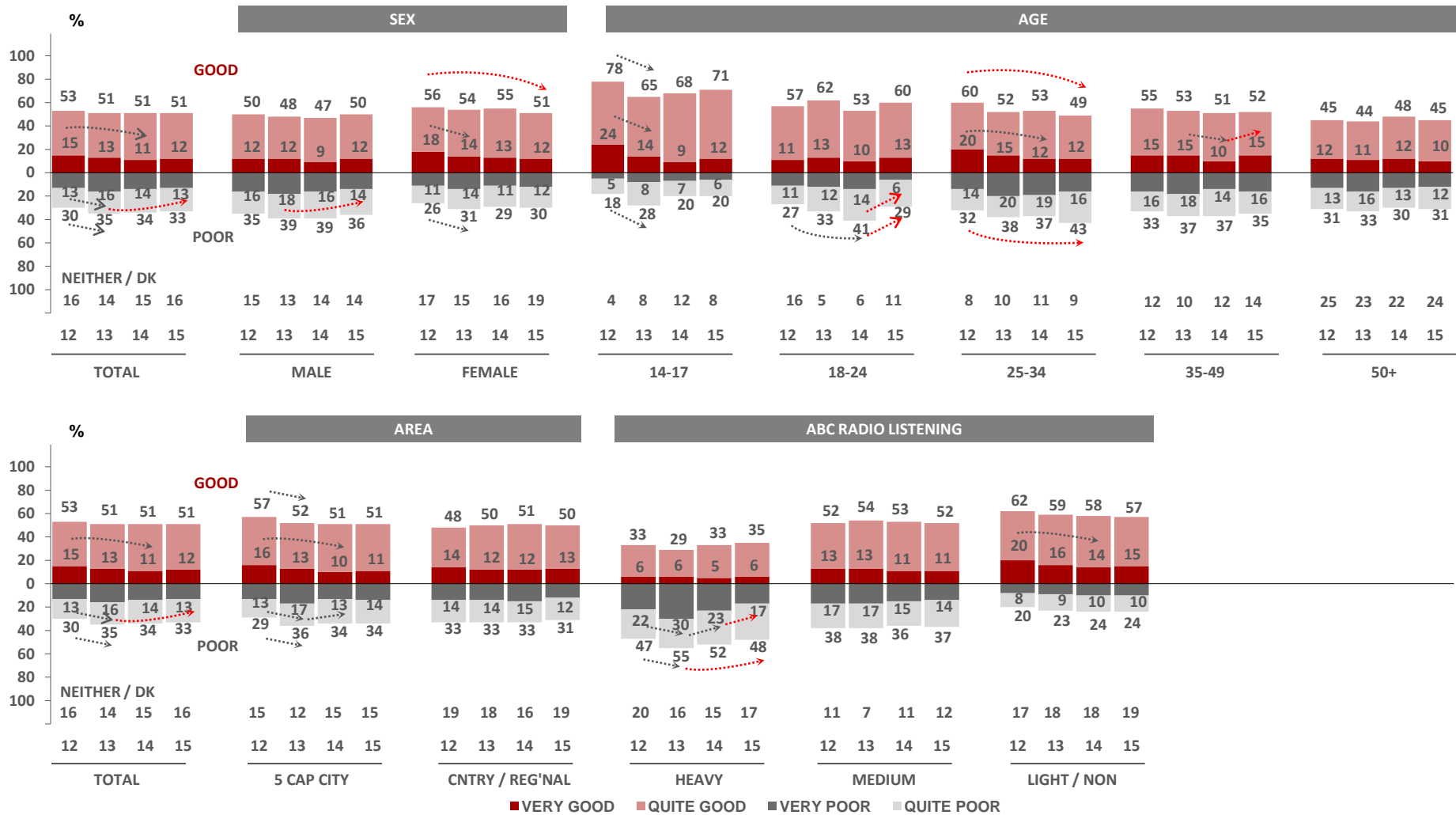


FIGURE 11

BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY/ REGIONAL (n=815, 813, 814, 818); ABC RADIO LISTENING: HEAVY (n=472, 472, 454, 447), MEDIUM (n=534, 548, 555, 604), LIGHT / NON (n=902, 883, 893, 862)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

4.3 Radio (cont'd)

4.3.2 Amount of programming personally like to listen to

Fifty seven percent of Australians believe ABC Radio does a 'good job' in terms of the amount of programming it provides that they personally like to listen to, compared with 49 percent for commercial radio (Figure 12). The number who feel commercial radio does a 'poor' job remains substantially greater (34 percent) than for ABC Radio (17 percent).

Reflecting attitudes about quality, perceptions about the appeal of ABC Radio and commercial radio content have been broadly consistent over the last four to five waves.

Among people aged 50+, the narrowing of the gap in perceptions about the *quality* of ABC Radio and commercial radio is also found in relation to the amount of *appealing content* that each provides. However, among 25 to 34's, the large positive gap in perceptions about the quality of ABC Radio vs. commercial radio over the last *three* waves is only evident in the current wave for appealing content.

Radio - Amount of programming like to listen to

And overall would you say that ... (TYPE) does a good job, or a poor job, in terms of the amount of programming it provides that you personally like to listen to?

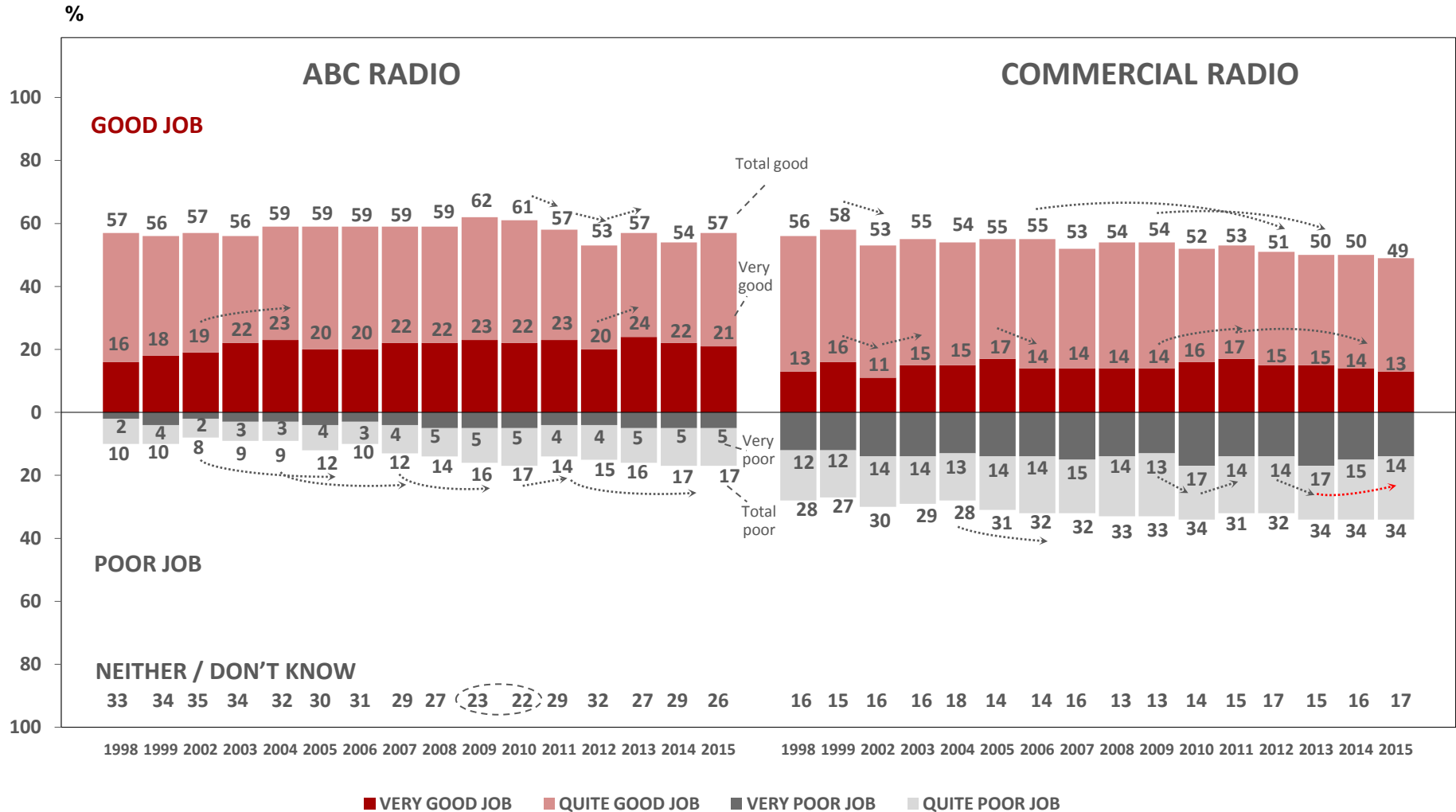


FIGURE 12

BASE: AGED 14+ NATIONALLY: TOTAL (n=1290, 1900, 1900, 1900, 1900, 1900, 1900, 1903, 1902, 1900, 1905, 1904, 1908, 1903, 1902, 1913)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

ABC Radio - Amount of programming like to listen to

And overall would you say that ABC Radio does a good job, or a poor job, in terms of the amount of programming it provides that you personally like to listen to?

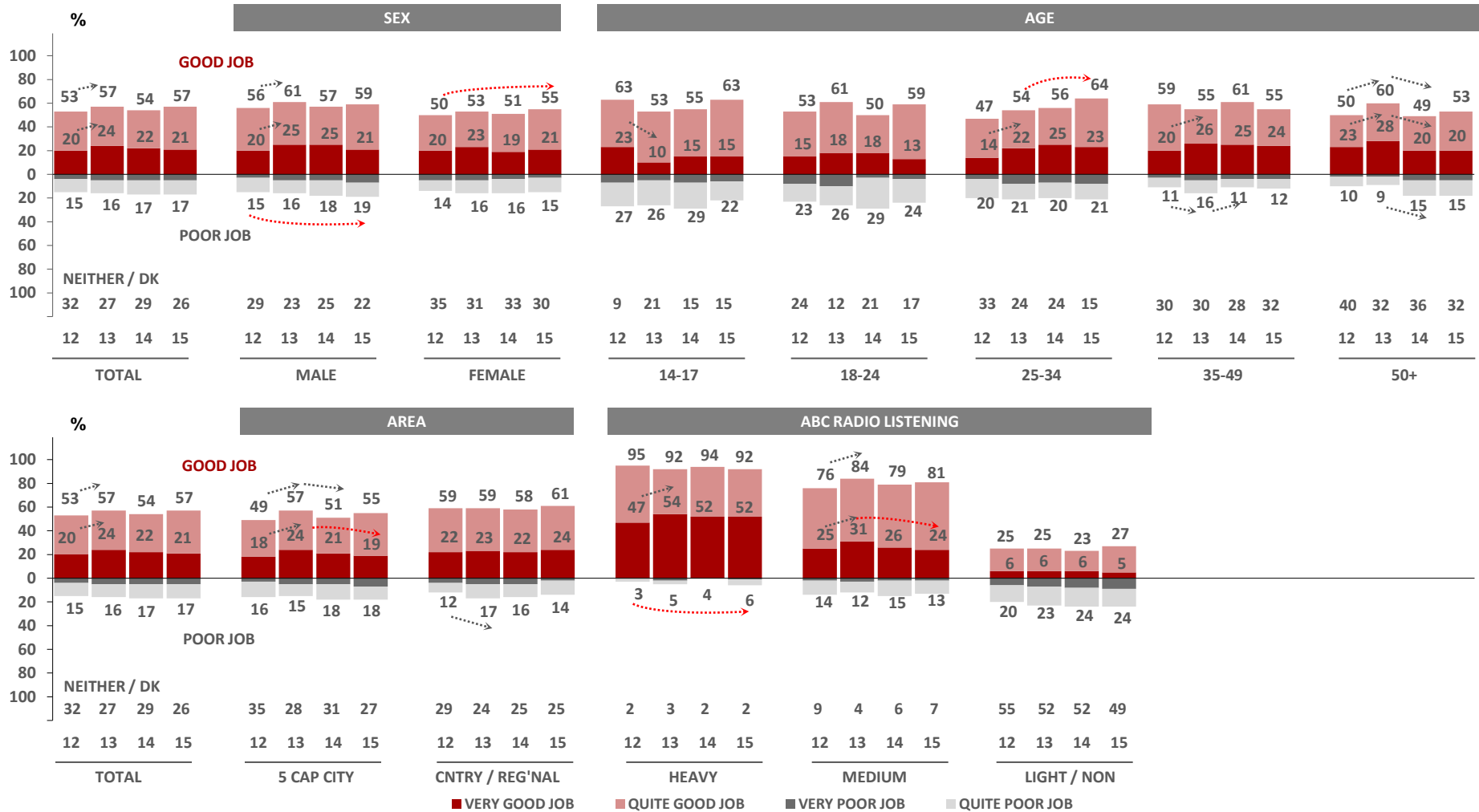


FIGURE 13

BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY/ REGIONAL (n=815, 813, 814, 818); ABC RADIO LISTENING: HEAVY (n=472, 472, 454, 447), MEDIUM (n=534, 548, 555, 604), LIGHT / NON (n=902, 883, 893, 862)

Statistically significant change:
 Noted prior to 2015 wave
 Noted with 2015 wave

Commercial Radio - Amount of programming like to listen to

And overall would you say that commercial radio does a good job, or a poor job, in terms of the amount of programming it provides that you personally like to listen to?

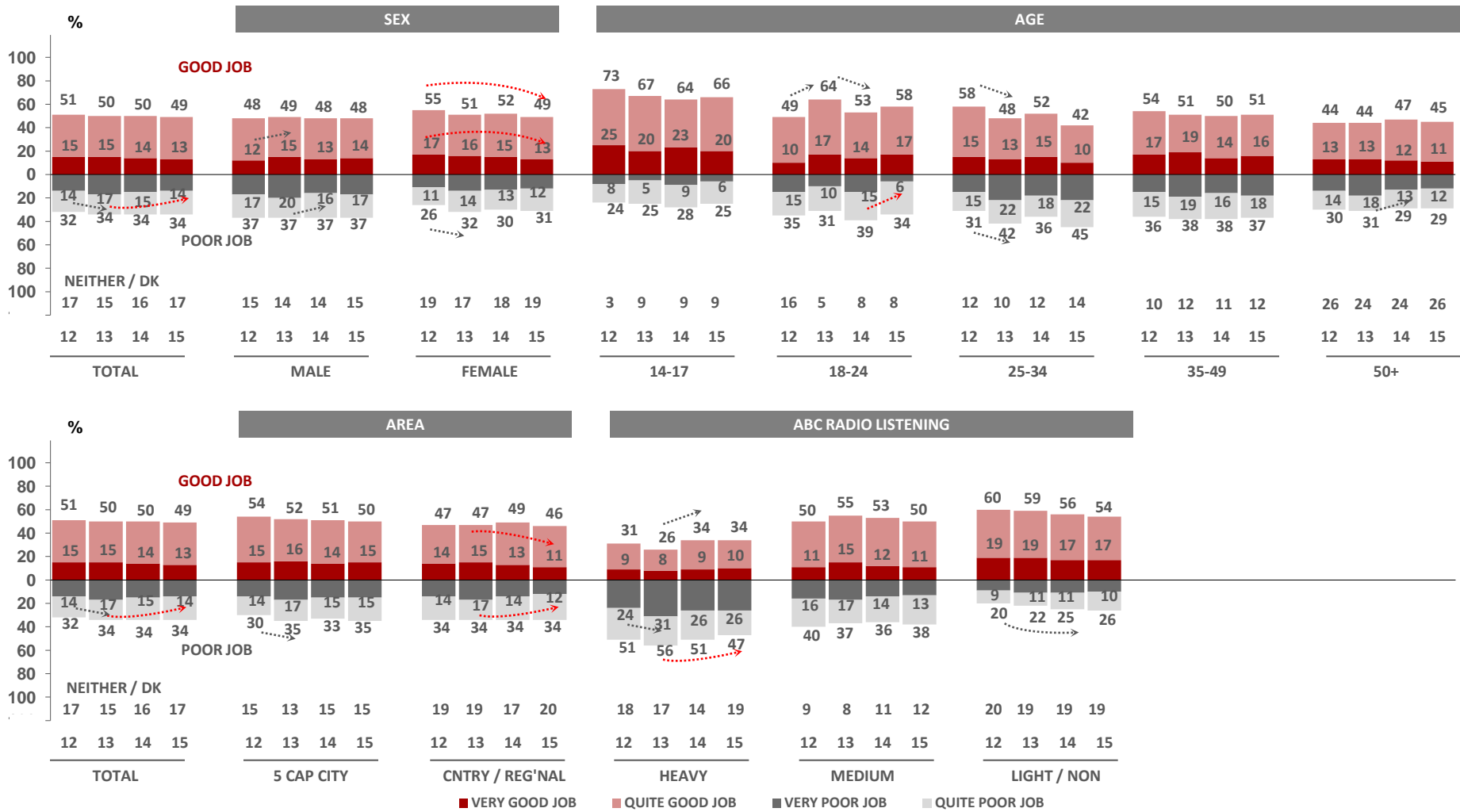


FIGURE 14

BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY/ REGIONAL (n=815, 813, 814, 818); ABC RADIO LISTENING: HEAVY (n=472, 472, 454, 447), MEDIUM (n=534, 548, 555, 604), LIGHT / NON (n=902, 883, 893, 862)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

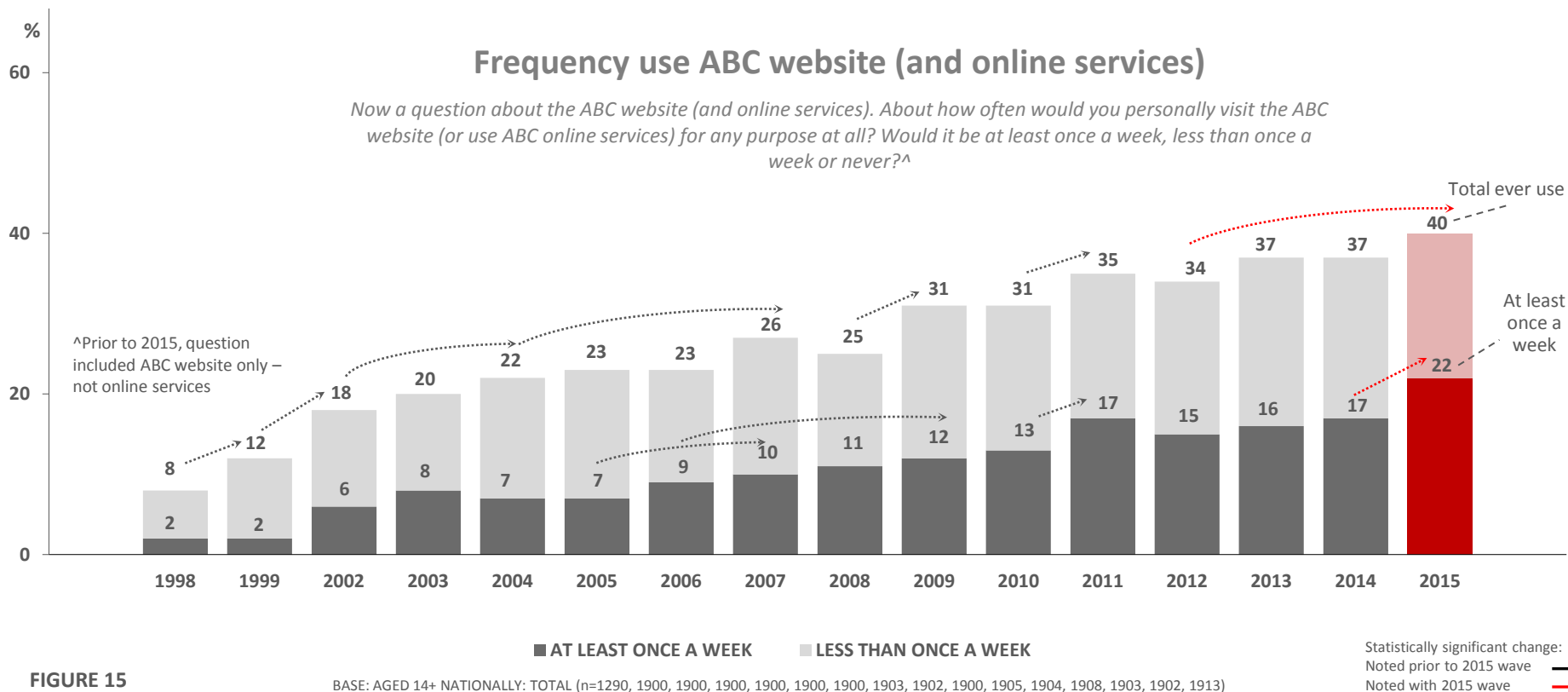
4.4 Online

4.4.1 Usage of the ABC website (and online services)

Forty percent of Australians claim to *ever* use the ABC website or online services, even if only occasionally, and 22 percent say they do so at least once a week (Figure 15). In the current wave, this survey question was broadened to include ABC 'online services' as well as the website, and it's likely this has contributed to the large gain in 'at least weekly' usage (up from 17 percent to 22 percent).

Consistent with previous findings about the website, usage of the website and online services is higher among people aged under 50, and continues to be mainly concentrated among those who are heavy/medium users of ABC TV/ ABC Radio.

However, while usage of the website has generally been higher among men than women, the inclusion of online services finds men and women more closely aligned (Figure 16).



Frequency use ABC website and online services

Now a question about the ABC website and online services. About how often would you personally visit the ABC website or use ABC online services for any purpose at all? Would it be at least once a week, less than once a week or never?^

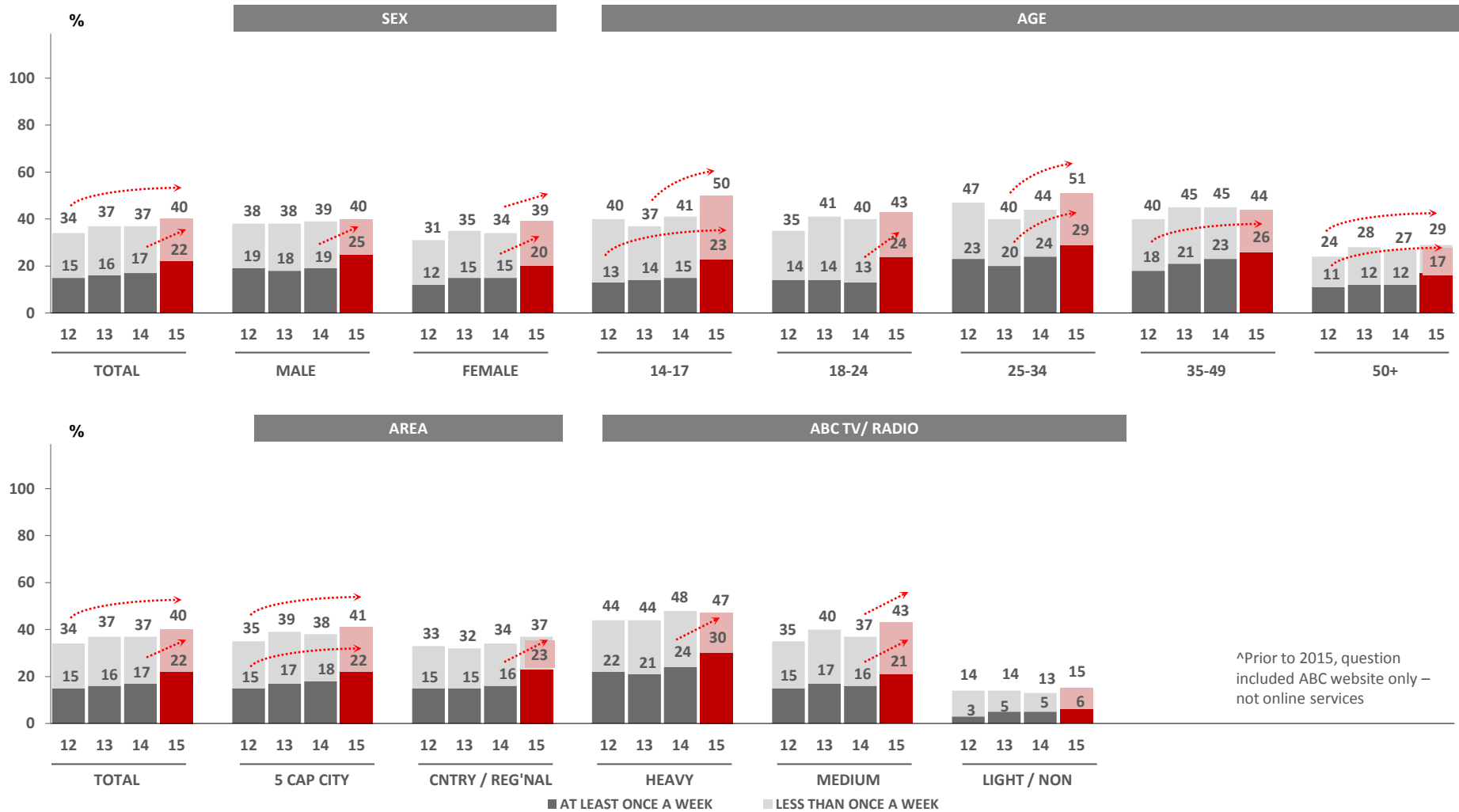


FIGURE 16

BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913); SEX: MALE (n=953, 952, 950, 957), FEMALE (n=955, 951, 952, 956); AGE: 14-17 (n=150, 150, 150, 150), 18-24 (n=165, 157, 179, 162), 25-34 (n=201, 246, 231, 188), 35-49 (n=613, 517, 482, 417), 50+ (n=779, 833, 860, 996); AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY/ REGIONAL (n=815, 813, 814, 818); ABC TV/ RADIO: HEAVY (n=834, 851, 852, 871), MEDIUM (n=737, 710, 726, 727), LIGHT/NON (n=337, 342, 324, 315)

Statistically significant change:
Noted prior to 2015 wave →
Noted with 2015 wave →

4.4 Online (cont'd)

4.4.2 Quality and amount of content on ABC website (and online services)

Among those who ever use the ABC's website or online services, the vast majority (89 percent) believe the *quality* of content is 'good', and 40 percent rate the quality as *very good*, which is up on 34 percent in relation to the *website* two years ago. At the same time, compared with 2012, the number who describe the content as *poor* is also up very slightly (from 2 percent to 5 percent) - Figure 17.

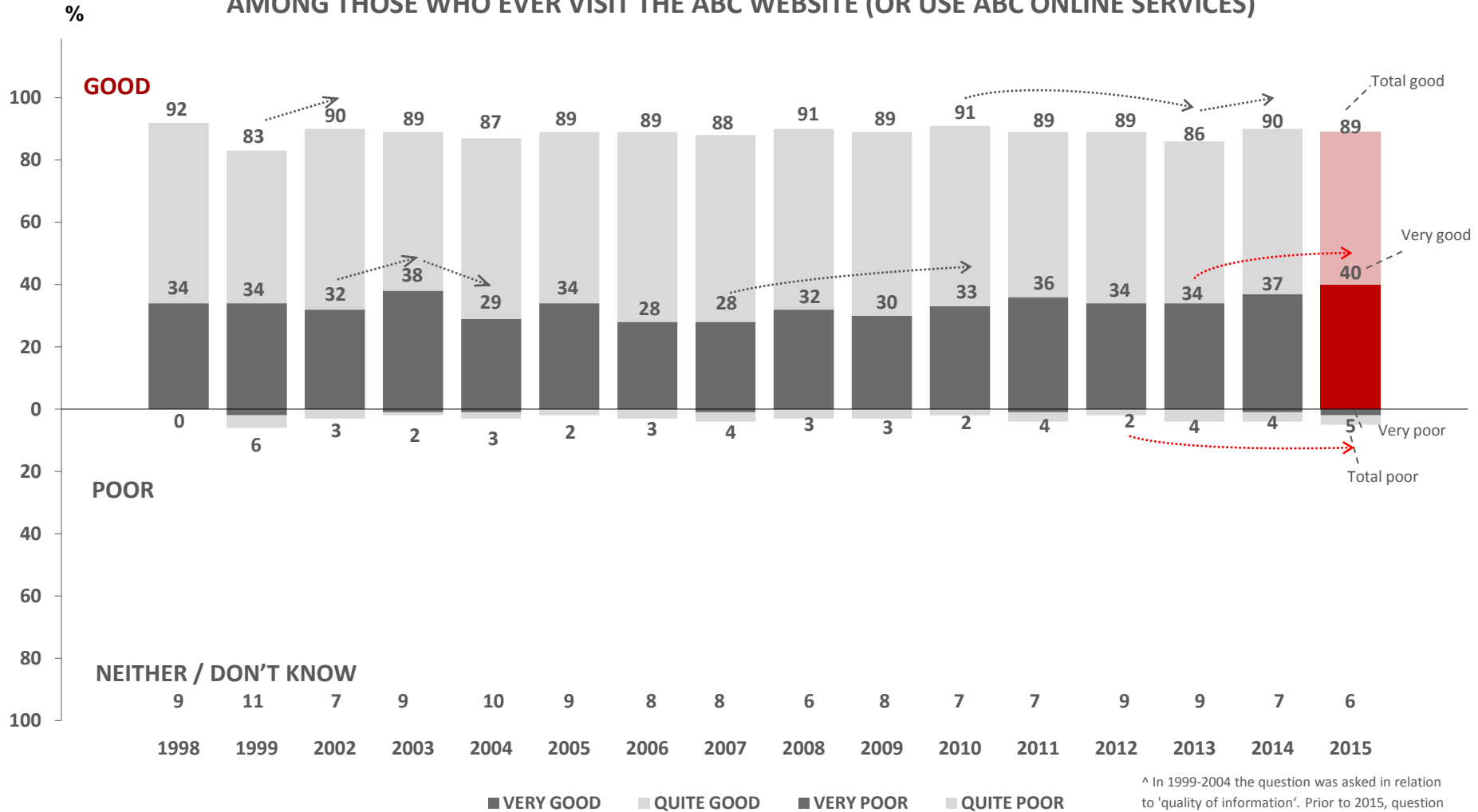
Nine-in-ten users also feel the website/ online services do a 'good job' on the *amount* of relevant content they provide, with 44 percent describing it as *very good*. There is no significant change compared with last year (Figure 18).

Analysis among demographics shows that the vast majority of users in each segment rate the site positively both on quality and quantity of content, though not surprisingly, those who use it more frequently are more enthusiastic in their rating of the site.

ABC website (and online services) - quality of content

Do you personally think the quality of the content on the ABC website or online services you use is good or poor?^

AMONG THOSE WHO EVER VISIT THE ABC WEBSITE (OR USE ABC ONLINE SERVICES)



^ In 1999-2004 the question was asked in relation to 'quality of information'. Prior to 2015, question included ABC website only – not online services

FIGURE 17

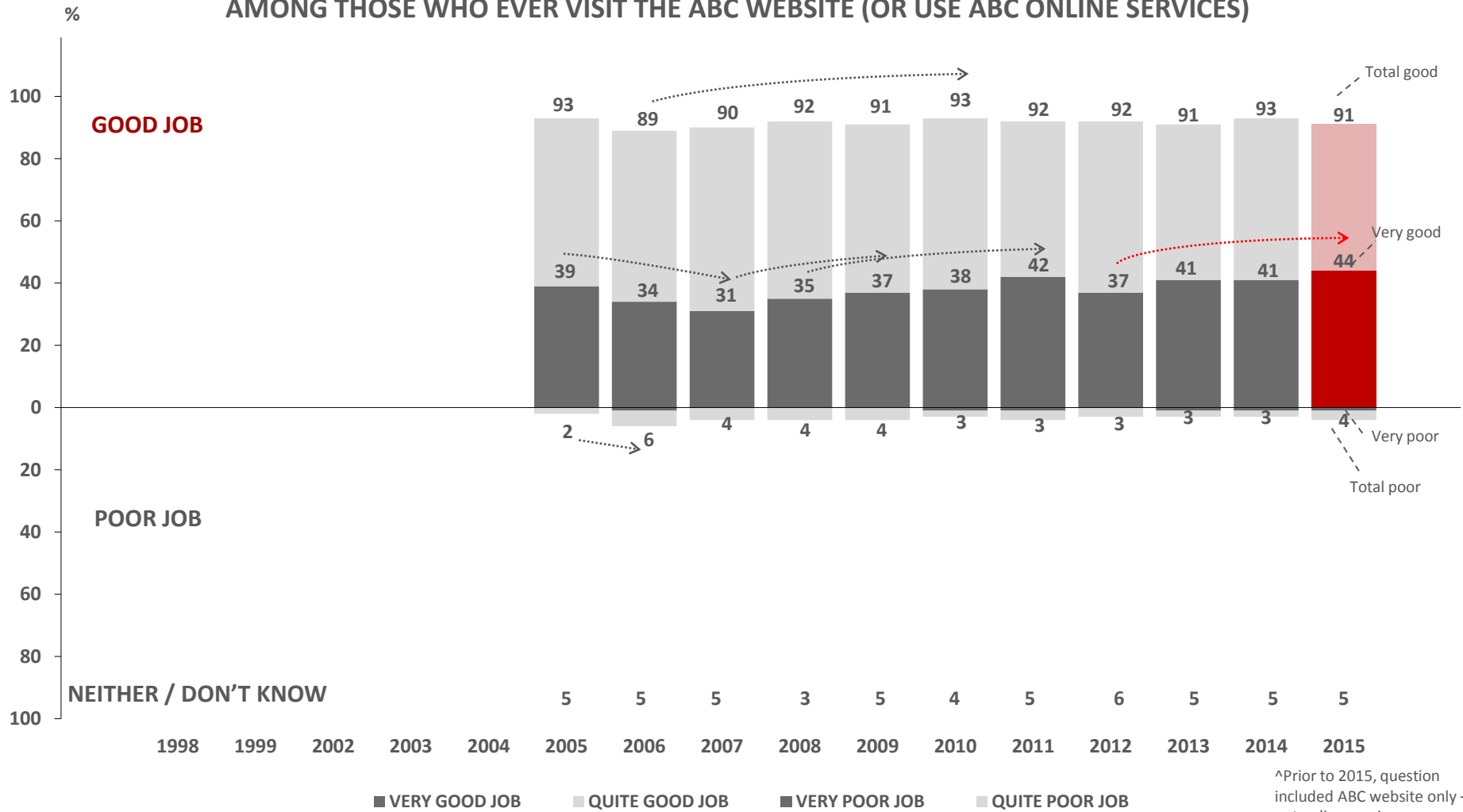
BASE: AGED 14+ NATIONALLY WHO EVER VISIT ABC WEBSITE (n=115, 237, 365, 402, 453, 464, 471, 547, 514, 592, 633, 706, 680, 727, 715, 763)

Statistically significant change:
 Noted prior to 2015 wave
 Noted with 2015 wave

ABC website (and online services) – amount of content

As far as the things you use the ABC website or online services for, would you say they do a good job, or a poor job, in terms of the amount of content they provide on those things?^

AMONG THOSE WHO EVER VISIT THE ABC WEBSITE (OR USE ABC ONLINE SERVICES)



^Prior to 2015, question included ABC website only – not online services

Statistically significant change:
 Noted prior to 2015 wave
 Noted with 2015 wave

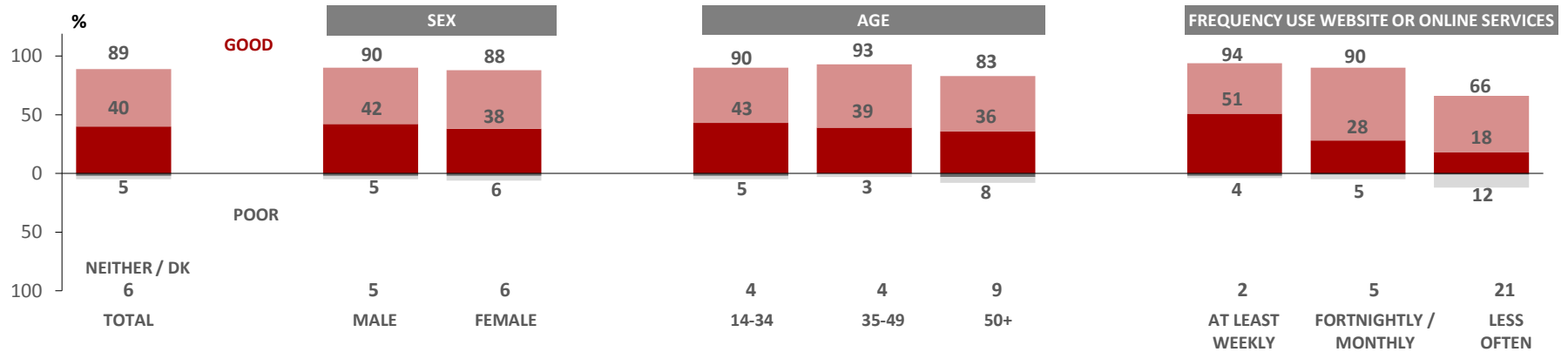
FIGURE 18

BASE: AGED 14+ NATIONALLY WHO EVER VISIT ABC WEBSITE (n= 464, 471, 547, 514, 592, 633, 706, 680, 727, 715, 763)

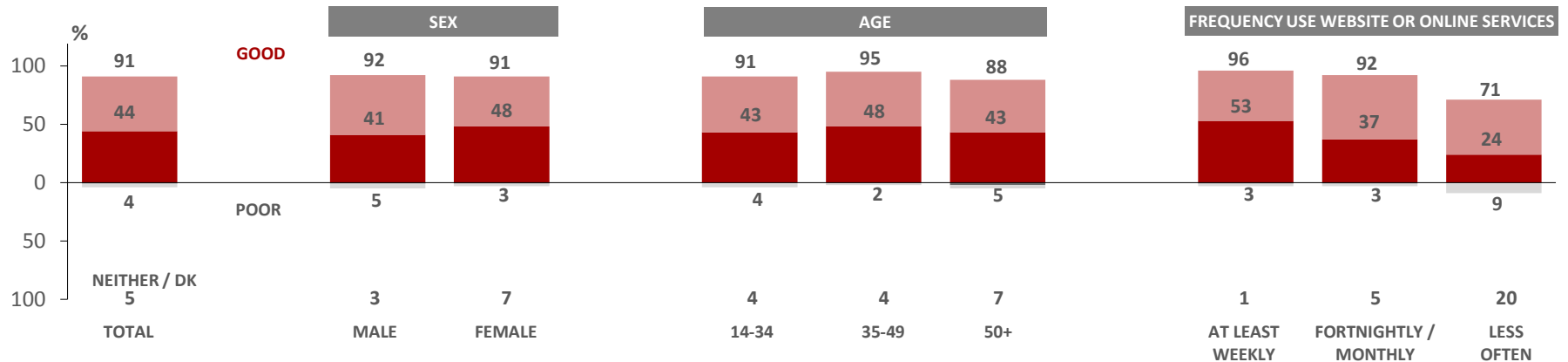
ABC website and online services

AMONG THOSE WHO EVER VISIT THE ABC WEBSITE OR USE ABC ONLINE SERVICES

Quality of content



Amount of content



■ VERY GOOD ■ QUITE GOOD ■ VERY POOR ■ QUITE POOR

FIGURE 19

BASE: AGED 14+ NATIONALLY WHO EVER VISIT ABC WEBSITE / USE ONLINE SERVICES AGED 14+ NATIONALLY: TOTAL (n=763); SEX: MALE (n=385), FEMALE (n=378); AGE: 14-34 (n=240), 35-49 (n=201), 50+ (n=322); FREQUENCY USE WEBSITE/ ONLINE SERVICES: AT LEAST WEEKLY (n=430), FORTNIGHTLY / MONTHLY (n=227), LESS OFTEN (n=106)

4.5 Coverage of country news and information

Community perceptions about coverage of country news and information remain far more favourable for the ABC than for commercial media - both among people in capital cities and people in country/regional areas (Figure 20).

Eighty percent of Australians believe the ABC does a 'good job' covering country/regional issues compared with 42 percent for commercial media.

Compared with last year, there's been a small drop in positive sentiment about commercial media, and the level of negative sentiment is up compared with two years ago. There is also a small increase in negative sentiment about the ABC compared with two years ago – but the level of criticism about the ABC on this issue remains very low compared with commercial media.

Doing a good or poor job in country and regional areas

Thinking now of news and information about things happening in country and regional areas of Australia. In your opinion, do ABC / commercial TV & radio stations & websites do a good job, or a poor job of covering things happening in country and regional areas of Australia?

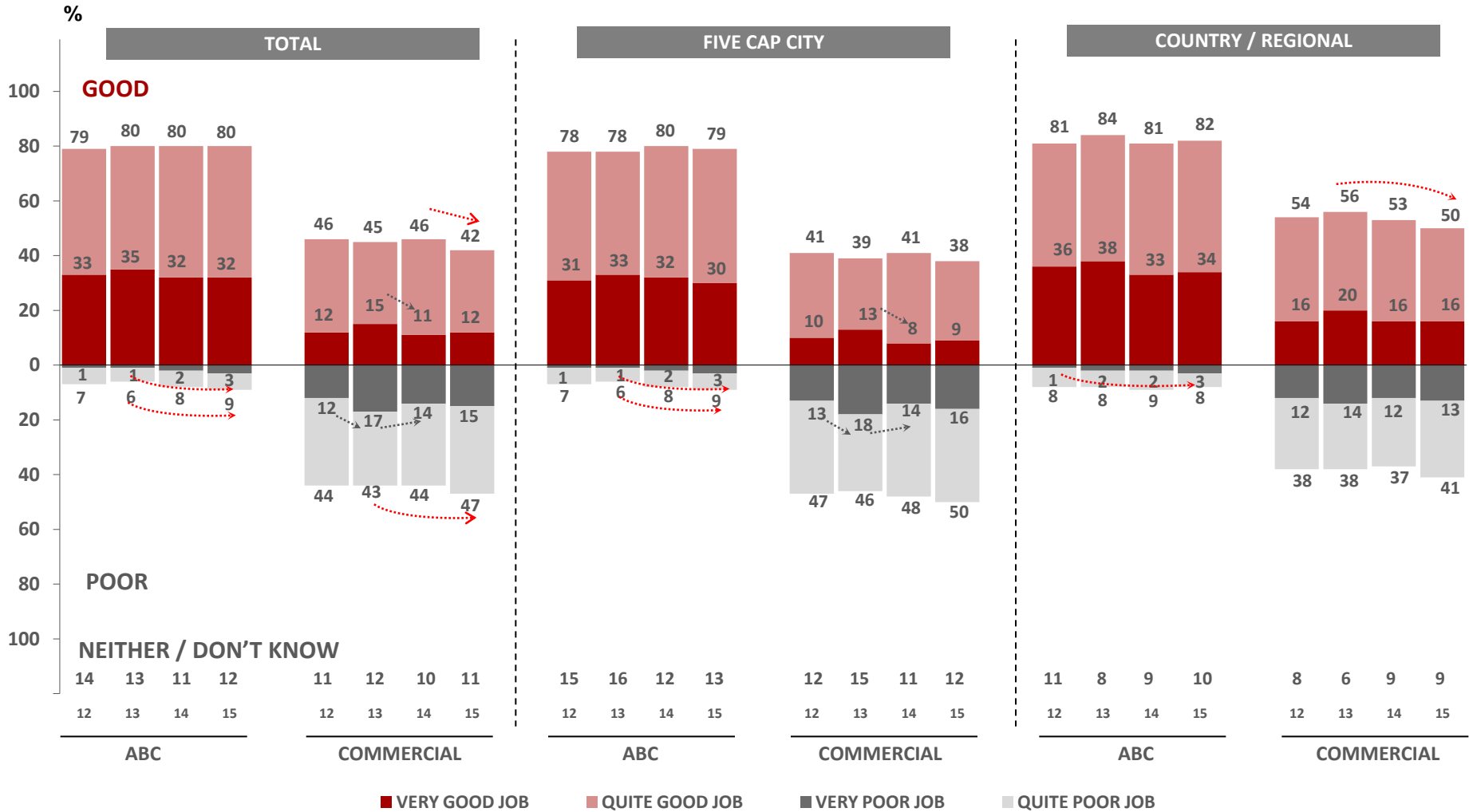


FIGURE 20

BASE: AGED 14+ NATIONALLY: TOTAL (n=1908, 1903, 1902, 1913);
 AREA: 5 CAP CITY (n=1093, 1090, 1088, 1095), COUNTRY / REGIONAL (n=815, 813, 814, 818)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

4.6 Other specific charter obligations

Respondents to the Appreciation Survey are asked if they believe the ABC is doing a 'good job' or a 'poor job' on nine other specific aspects of the ABC charter:

- a) *being innovative - that is trying to do new things and different types of programs*
- b) *being balanced and even-handed when reporting news and current affairs*
- c) *encouraging and promoting Australian performing arts such as music and drama*
- d) *broadcasting programs of an educational nature*
- e) *being distinctively Australian and contributing to Australia's national identity*
- f) *being efficient and well managed*
- g) *broadcasting programs that are different from the sort of programs you would get on commercial television and commercial radio stations*
- h) *having a good balance between broadcasting programs of wide appeal, and broadcasting programs that appeal to people with special interests*
- i) *broadcasting programs that reflect the cultural diversity of the Australian community*

The majority of Australians remain of the view that the ABC is doing 'a good job' in fulfilling each area (Figures 21 and 22).

The only significant change compared with last year is a small rise (after a dip last year) in the number of Australians who believe the ABC does a *very good job* of being being balanced and even handed when reporting news and current affairs. Yet at the same time, compared with two years ago, there has also been a small increase in the number who feel the ABC does a *poor job* on this issue.

Over the same two year period, there has a small increase in the number of Australians who believe the ABC does a *poor job*:

- broadcasting programs that are different from commercial television or radio;
- being distinctively Australian; and,
- broadcasting programs that reflect Australian cultural diversity.

The Charter - doing a good or poor job

Now we'd like your opinion about other aspects of the ABC. Based on your own experience, or what you may have seen or heard, do you personally think the ABC is doing a good job or a poor job on each of the following?

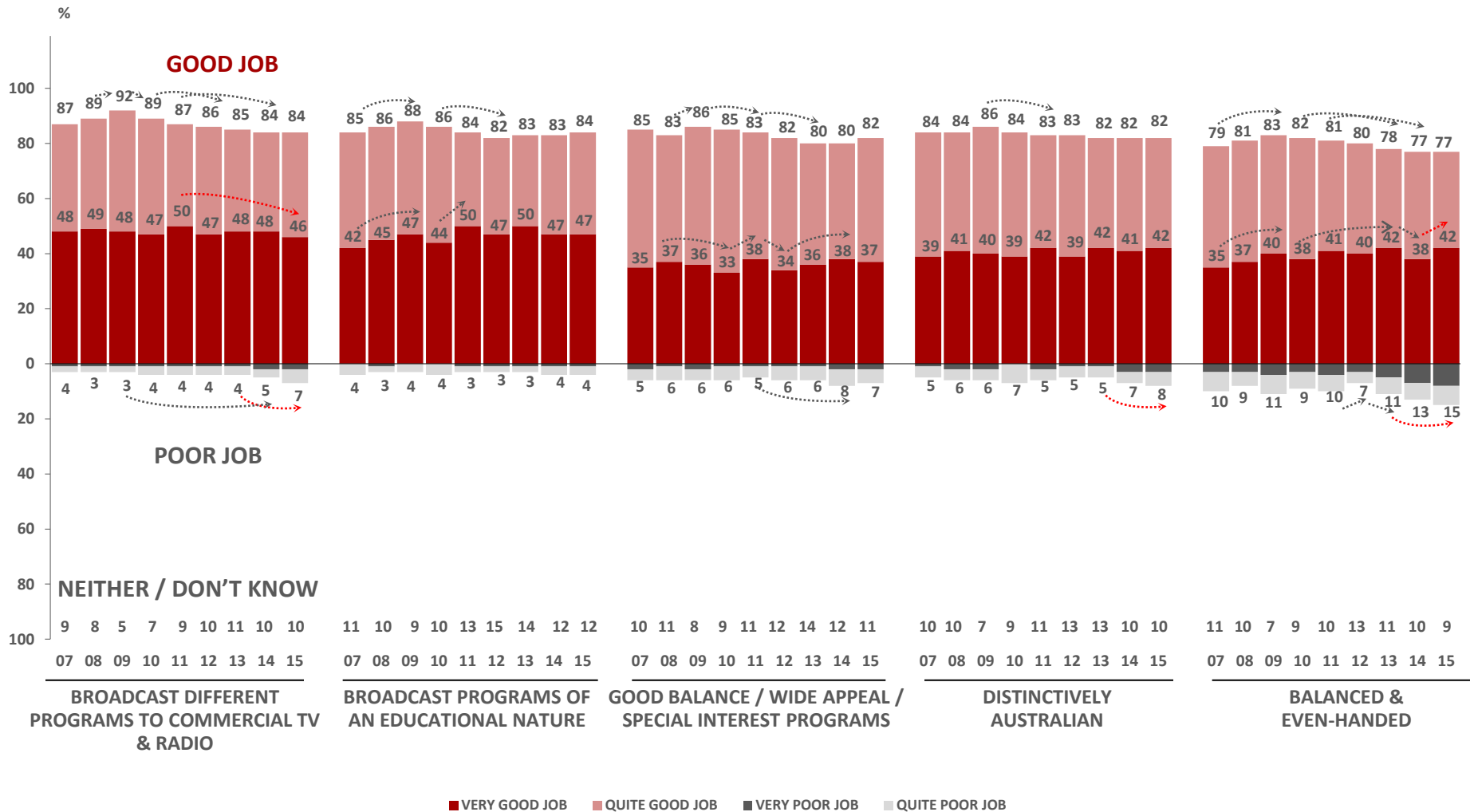


FIGURE 21

BASE: AGED 14+ NATIONALLY (n=1903, 1902, 1900, 1905, 1904, 1908, 1903, 1902, 1913)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

The Charter - doing a good or poor job (cont'd)

Now we'd like your opinion about other aspects of the ABC. Based on your own experience, or what you may have seen or heard, do you personally think the ABC is doing a good job or a poor job on each of the following?

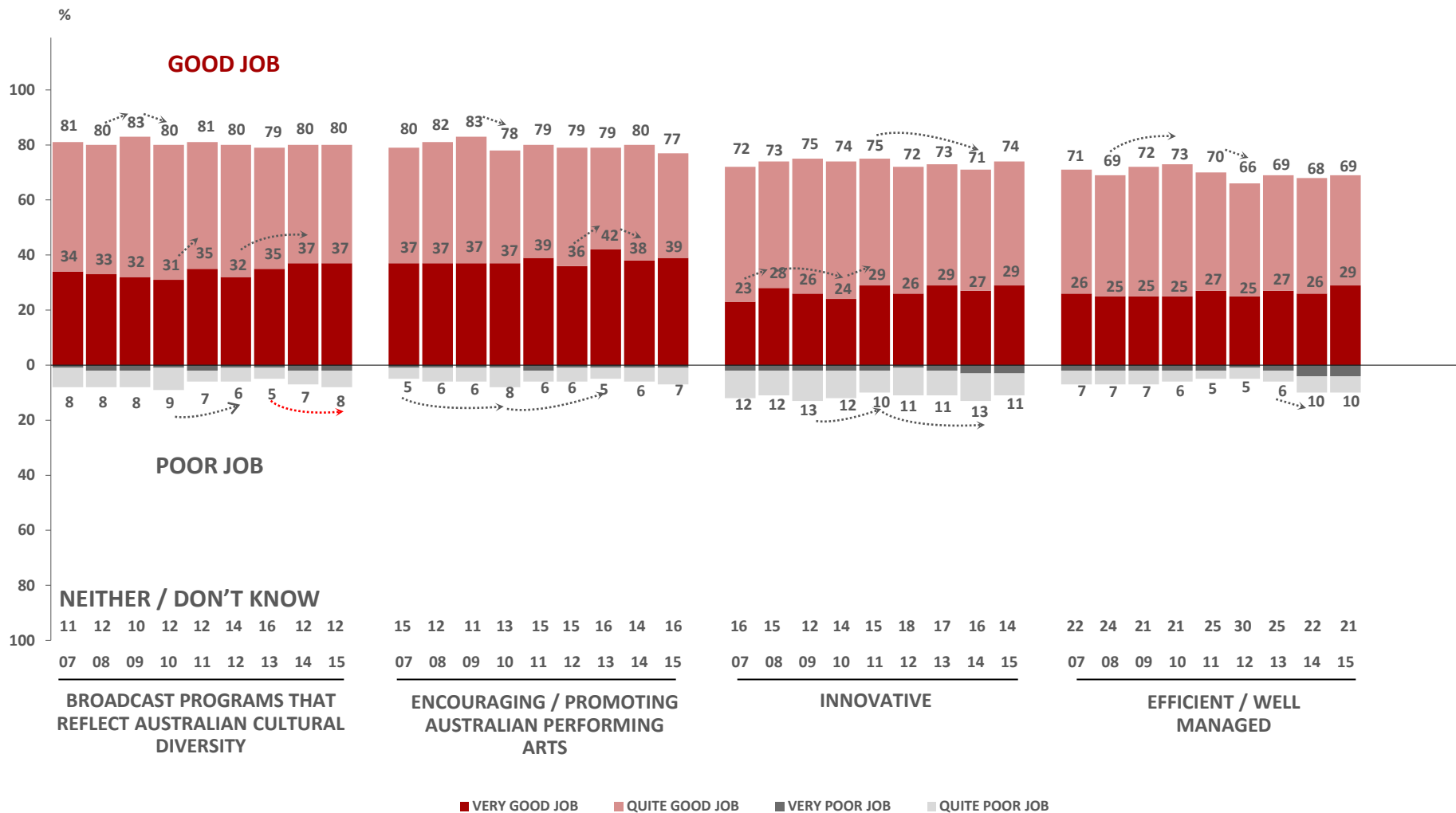


FIGURE 22

BASE: AGED 14+ NATIONALLY (n=1903, 1902, 1900, 1905, 1904, 1908, 1903, 1902, 1913)

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →

4.7 News and current affairs – being balanced and even handed

Perceptions about balance and even-handedness in reporting were explored in more detail among viewers and listeners¹ of the ABC's flagship News and Current Affairs programs:

- Television: *7pm News*, *7.30* (previously *7.30 Report*);
- Radio: *The World Today*, *AM* and *PM*.

The vast majority of those who watch/listen to the respective programs believe it does a 'good job' of being balanced and even-handed – and in each case, around 40 to 45 percent of viewers/listeners believe it does a 'very good job'.

Changes of note are as follows:

- Although the number of *7.30* viewers who feel the program does a *very good job* is at its highest level since 2012, compared with last year, there has also been a small increase in the number who feel it does a *poor job* of being balanced and even handed.
- Over the last few years, there has also been a slight rise in the number of *AM/PM* listeners who feel the programs do a *poor job*.
- Compared with last year, fewer listeners of *The World Today* feel the program does a good job. However this is mainly because fewer have an opinion on this issue, rather than more listeners having a negative view about the program.

1. Those who claim to 'ever' watch / listen to the respective programs.

ABC program does a good / poor job of being balanced and even handed

Thinking now about the extent to which ABC programs are balanced and even handed. For each of the following, please tell me if you personally think they do a good job or a poor job of being balanced and even handed when reporting news and current affairs. Firstly...

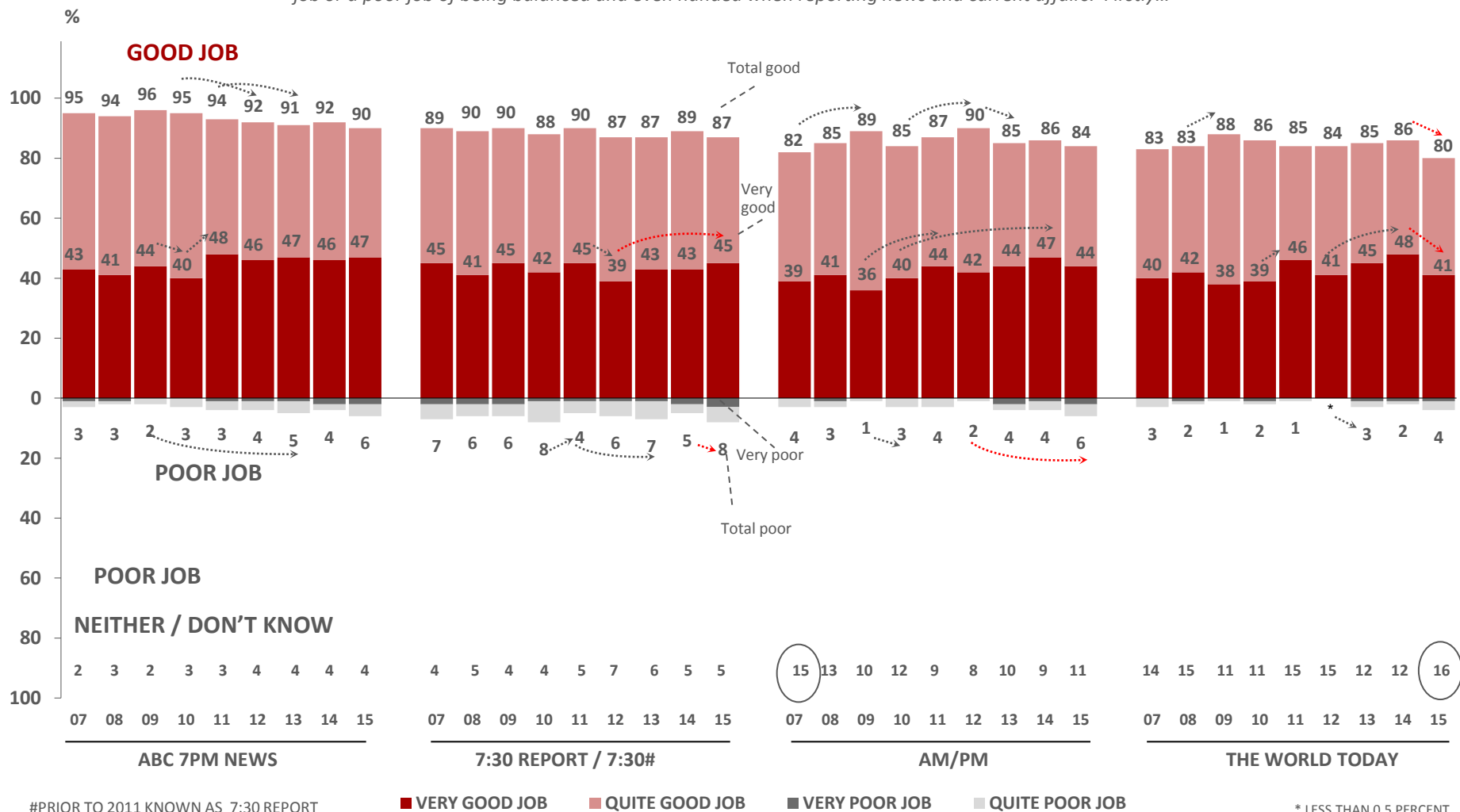


FIGURE 23

BASE: AGED 14+ NATIONALLY: WATCH / LISTEN TO SPECIFIC PROGRAM:
 ABC 7PM NEWS (n=1340, 1305, 1324, 1284, 1126, 1082, 1053, 1070, 1121), 7:30 (n=1237, 1266, 1261, 1231, 1046, 998, 1004, 1002, 1042),
 AM / PM (n=690, 627, 681, 728, 679, 613, 647, 629, 687), WORLD TODAY (n=516, 500, 540, 540, 509, 432, 481, 460, 512)

* LESS THAN 0.5 PERCENT

Statistically significant change:
 Noted prior to 2015 wave →
 Noted with 2015 wave →