RAJAR/Ipsos/RSMB
AUDIENCE ESTIMATES
FOR UK COMMUNITY RADIO STATIONS

Prepared for the *Listener Group* of the *DCMS Digital Radio & Audio Review*
April 2021

RAJAR/Ipsos/RSMB AUDIENCE ESTIMATES FOR UK COMMUNITY RADIO

All data is based on the period:1st April 2019 to 29th March 2020.

RAJAR data for All BBC, All Commercial and Other Radio is published to the RAJAR Gold Standard.
However, a few notes should be highlighted with regard to this bespoke audience estimate report for Community :-

- Any stations who do not subscribe to RAJAR do not appear in any fieldwork materials. However, participants are asked to manually add in the name of any station they listen to in the survey week which isn't prompted. These are known as 'write-in's.
- Of course, without the prompts afforded by being included in the fieldwork materials, it is likely that non-subscriber stations will be at a disadvantage when it comes to an accurate reflection of their listening figures – hence this group is currently collectively described as "Other listening" in the published RAJAR data and no further data breakdowns are possible.
- Mindful of this potential disadvantage, a 50% uplift has been applied to the reach data generated in this analysis of Community Radio. This figure comes from a previous study which showed that, for a non-mainstream station, the difference in reach when they were listed in the fieldwork materials vs. relying on respondents to recall and manually add-in the station was 50%. It is very difficult to tell the extent to which this 50% figure might be accurate in the case of Community Radio as a category but it is the only one we have to estimate what the reach might be if these stations had been included in the fieldwork materials.
- Furthermore we suspect that some of the audience most drawn to Community Radio output may also be those with whom a mass-population survey like RAJAR finds it slightly more challenging to engage.
- For all these reasons **these figures should be taken as an estimate of the reach of Community Radio in the UK**.
- This analysis was carried out and overseen by RSMB who oversee all statistical elements of the main RAJAR survey such as the sampling design and weighting.
- Where comparisons are made with "All Radio" this applies to data drawn from the RAJAR survey in Q1 2020, weighted to 12 months.

TOPLINE AUDIENCE DATA

**RAJAR WEEKS 14 2019 - 13 2020 (1st APRIL '19 - 29th MARCH '20)**

Report Number	Report Name	WEEKLY REACH		Reach 95% CI	Highest	Lowest
5960	ALL COMMUNITY RADIO (000s)	682		+/- 105	787	577
	% of UK Popn	1.2			1.4	1.0
5973	BLACK AND ASIAN COMMUNITY RADIO (000s)	152 (107 among Black & Asian Popn)		+/- 50	202	102
	% of UK Popn	0.3 (2% of Black & Asian Popn)			0.4	0.2

DATA INCLUDING 50% REACH UPLIFT

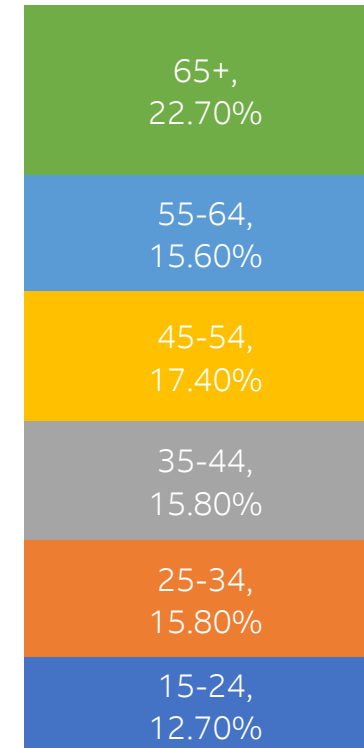| Report Number	Report Name	WEEKLY REACH		Reach 95% CI	Highest	Lowest
5960	ALL COMMUNITY RADIO (000s)	1023		+/- 129	1152	894
	% of UK Pop	1.8			2.1	1.6
5973	BLACK AND ASIAN COMMUNITY RADIO (000s)	228 (161 among Black & Asian Popn)		+/- 61	289	167
	% of UK Popn	0.4 (3% of Black & Asian Popn)			0.5	0.3

Age-wise, and compared with All Radio, Community Radio attracts the same proportion of U35s but then skews to a middle age-range of 35-64, while attracting fewer 65+s. It also skews much more C2DE than All Radio.

REACH PROFILE

ALL COMMUNITY RADIO NETWORK

Age	%
65+	14.40%
55-64	17.70%
45-54	20.60%
35-44	19.00%
25-34	15.50%
15-24	12.80%
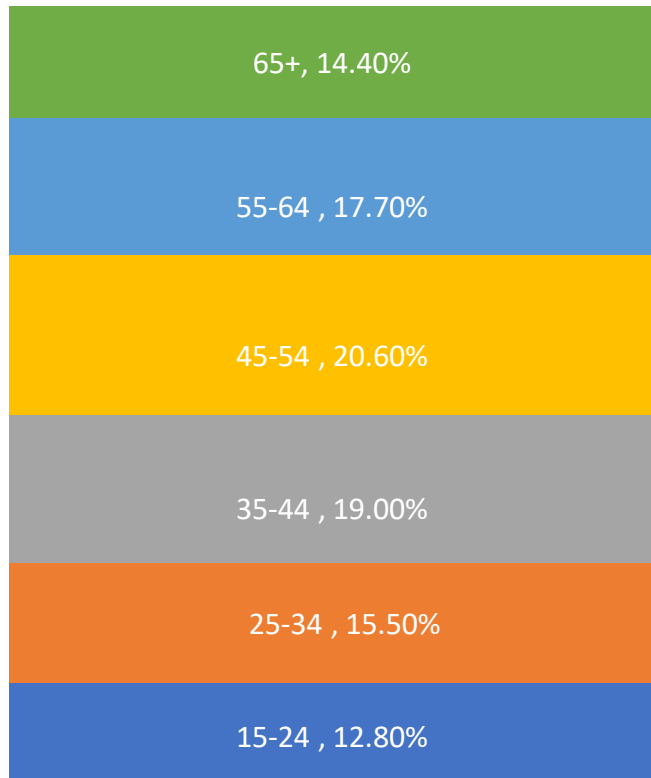
48% ABC1 / 52% C2DE
50% Men / 50% Women

ALL RADIO

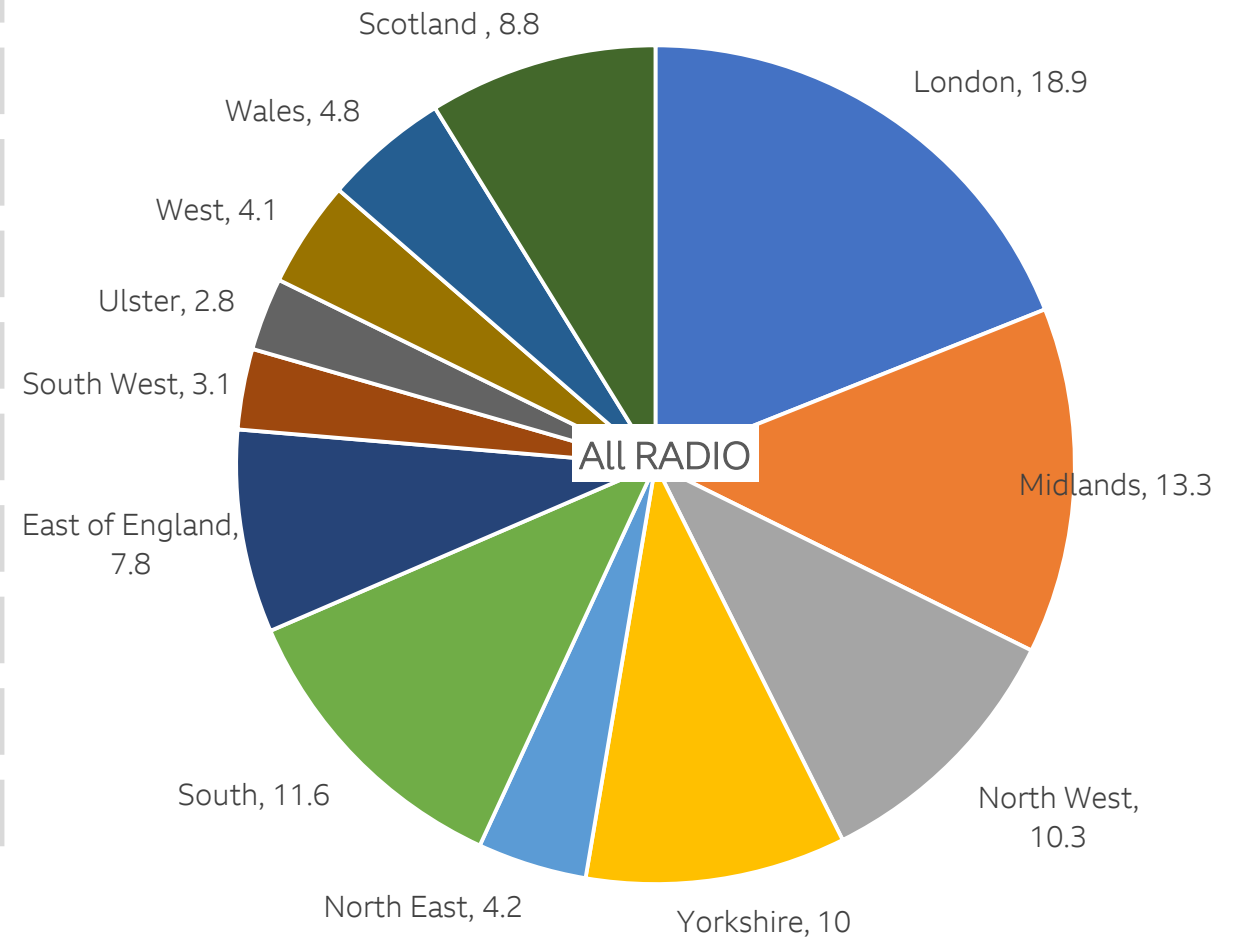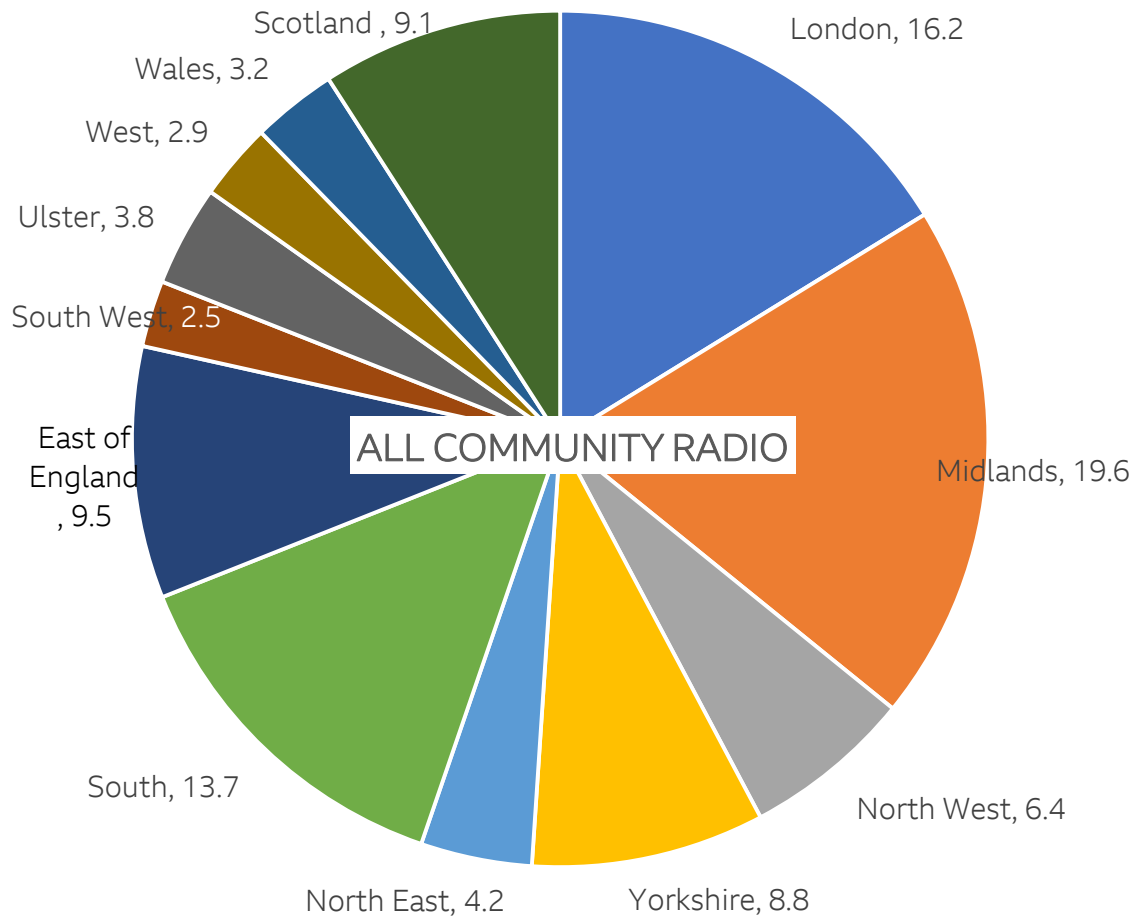| Age	%
65+	22.70%
55-64	15.60%
45-54	17.40%
35-44	15.80%
25-34	15.80%
15-24	12.70%

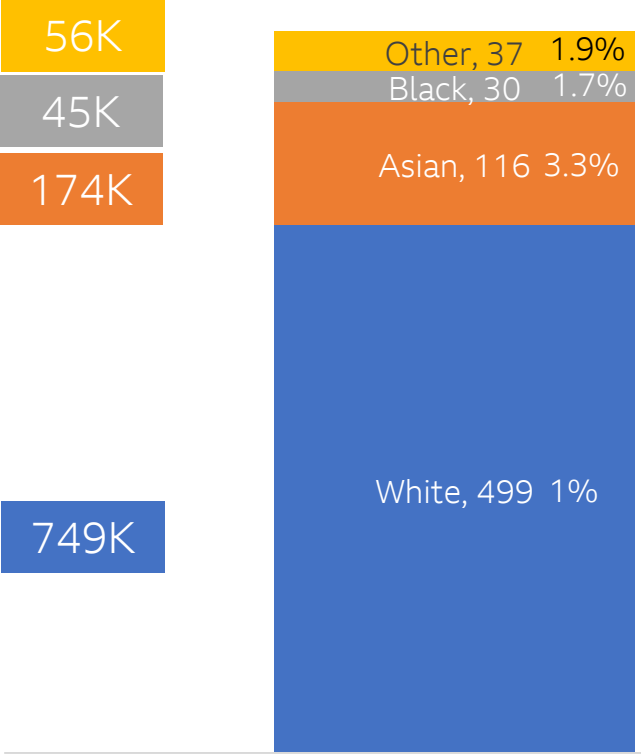56.5% ABC1 / 43.5% C2DE
48.9% Men / 51.1% Women

Versus the All Radio audience, Community Radio skews heavily to the Midlands; then to the South and East of England, to Ulster and, marginally, to Scotland.

ALL COMMUNITY RADIO

- London, 16.2
- Midlands, 19.6
- North West, 6.4
- Yorkshire, 8.8
- North East, 4.2
- South, 13.7
- East of England, 9.5
- South West, 2.5
- Ulster, 3.8
- West, 2.9
- Wales, 3.2
- Scotland, 9.1

All RADIO

- London, 18.9
- Midlands, 13.3
- North West, 10.3
- Yorkshire, 10
- North East, 4.2
- South, 11.6
- East of England, 7.8
- South West, 3.1
- Ulster, 2.8
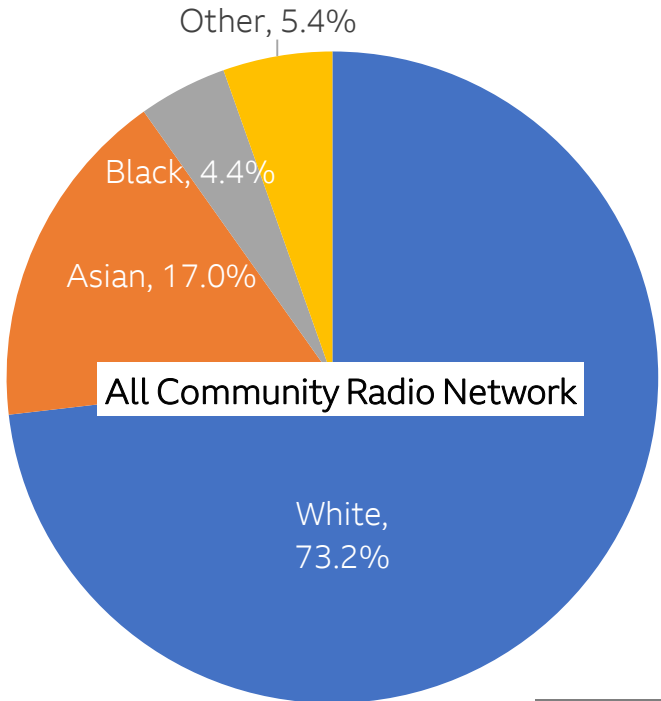- West, 4.1
- Wales, 4.8
- Scotland, 8.8

Community Radio reaches between 146-219k (2.7%-4.1%) audiences from Black and Asian populations every week. This represents a reach profile of 21% for these audiences, versus 8% for All Radio.

56K

45K

174K

749K

Other, 37 1.9%
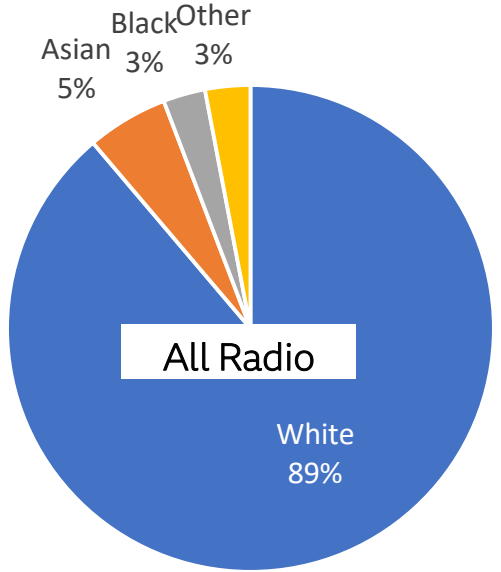
Black, 30 1.7%

Asian, 116 3.3%

White, 499 1%

All Community Radio Network

REACH (000s)/%

Other, 5.4%

Black, 4.4%

Asian, 17.0%

White, 73.2%

All Community Radio Network

Asian 5%

Black 3%

Other 3%

White 89%

All Radio

REACH PROFILE

NB – For those stations defined as "Black and Asian Community Radio Network", the reach among audiences from Black and Asian populations every week is between 107-161k (2-3%), which represents a reach profile of 70% for these audiences to this group of stations.

The pattern of listening to Community Radio is broadly the same as All Radio with a peak c8-8.30am. But the daytime decline is steeper before a further peak c2.30-4.30 and then the same post-7pm decline into the evening.

All Radio Mon-Fri Reach 0400-0400

15+ WEEKDAY AVERAGE REACH 0600-0600
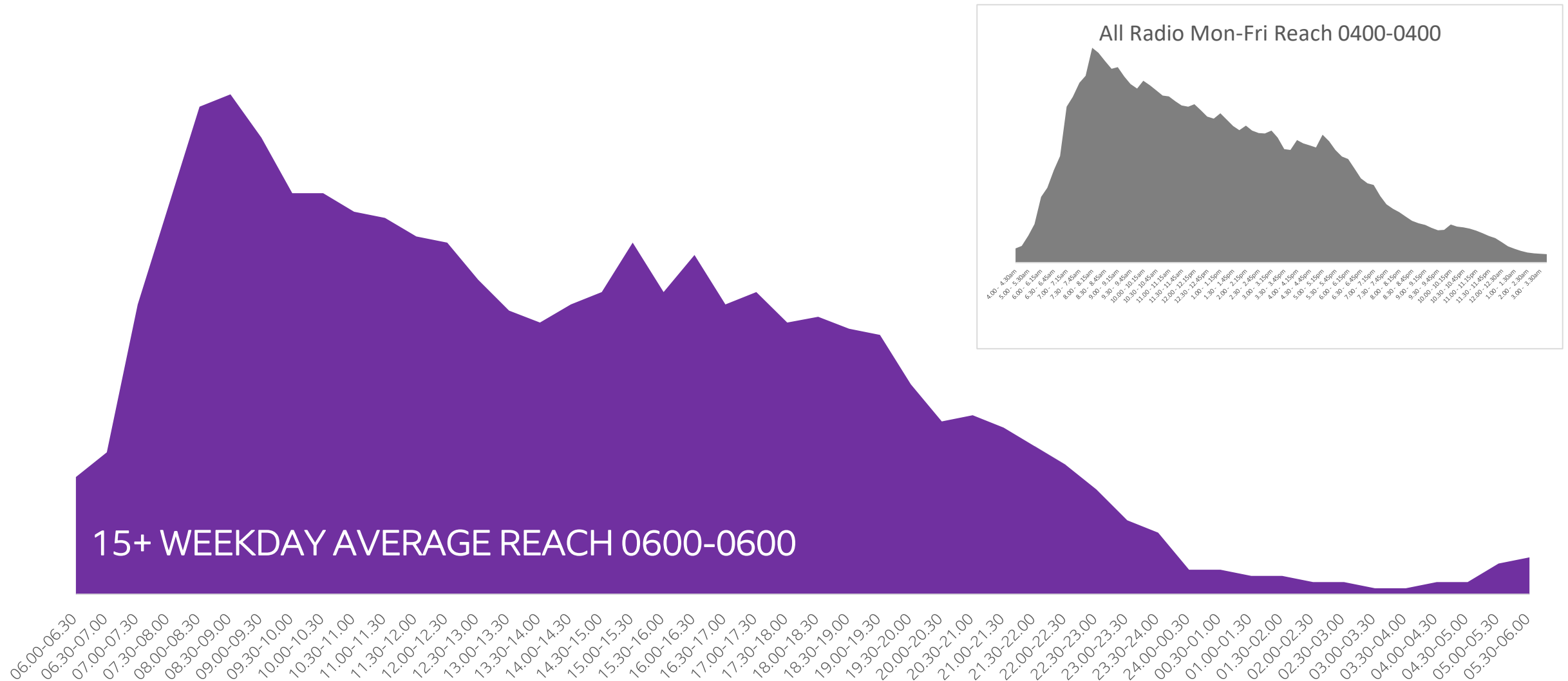
Community Radio skews much more heavily to Analogue, and also to Online (>1 in 5 hours). Location follows the same pattern as All Radio with a slight further skew to being in home.

Platform Share

Community Radio
- Online / Apps: 21.1%
- DTV: 3.6%
- DAB: 15.2%
- AM/FM: 60.0%

All Radio
- Online / Apps: 13.1%
- DTV: 4.6%
- DAB: 39.6%
- AM/FM: 42.7%

Legend: ■ AM/FM ■ DAB ■ DTV ■ Online / Apps

Location Share

Community Radio
- Work/Elsewhere: 15.6%
- Car/Van/Lorry: 23.8%
- At Home: 60.4%

All Radio
- Work/Elsewhere: 16.1%
- Car/Van/Lorry: 24.5%
- At Home: 59.2%

Legend: ■ At Home ■ Car/Van/Lorry ■ Work/Elsewhere
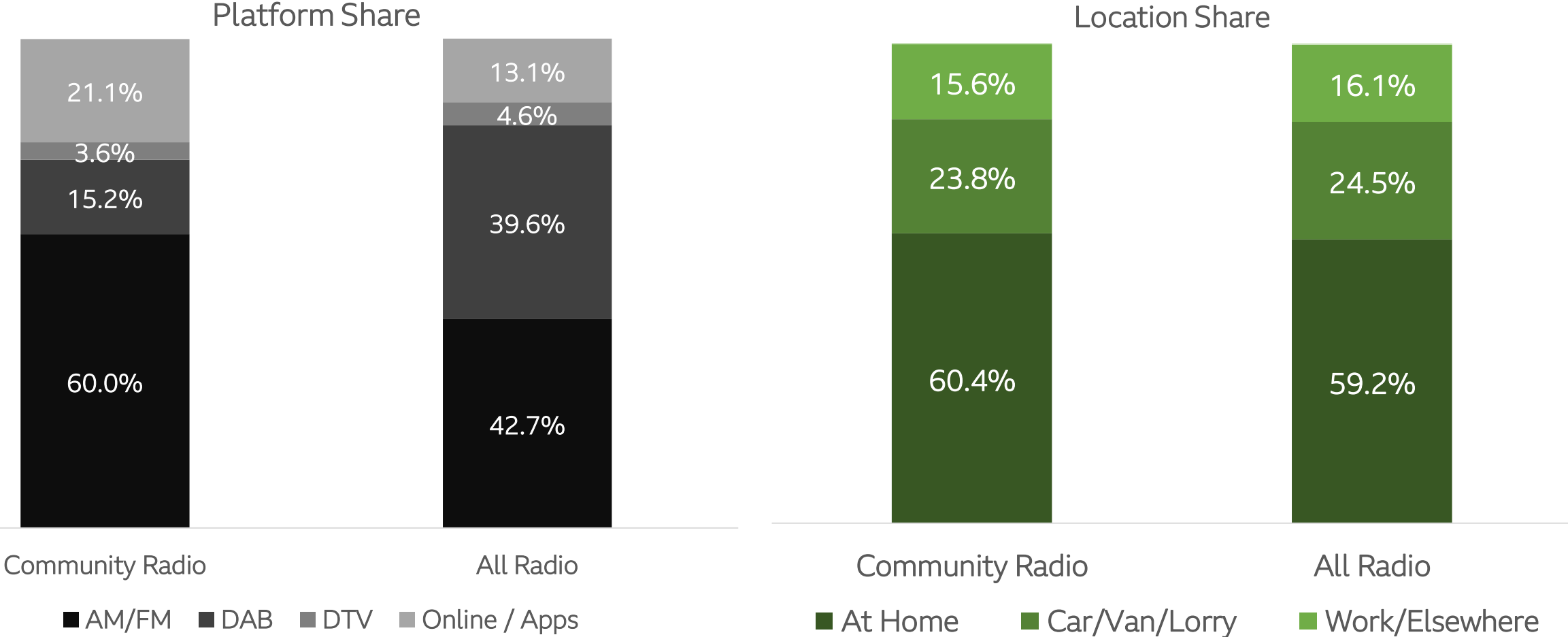
NB Uplift factors are not applied to hours; plus no platform edits are applied to Community Radio in the way they can be applied to All Radio

Community Radio delivers at least 5.4m hours every week to listeners who spend almost 8h per week with its services. As with reach, listening skews to 35-64s.

The analysis estimates that Community Radio delivers 5.4m hours every week, thanks to average hours per listener of 7h56m (ranging from 4h30 per 15-24 listener to 11h for those aged 65-74).

Collectively, this gives these stations a 0.5% share of all UK listening.

% Hours Profile

COMMUNITY RADIO

Age	%
65+	19.4%
55-64	22.7%
45-54	21.7%
35-44	17.1%
25-34	11.8%
15-24	7.2%

ALL RADIO

Age	%
65+	27.4%
55-64	18.6%
45-54	19.1%
35-44	14.4%
25-34	12.6%
15-24	7.9%

■ 15-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65+