



Commercial Radio

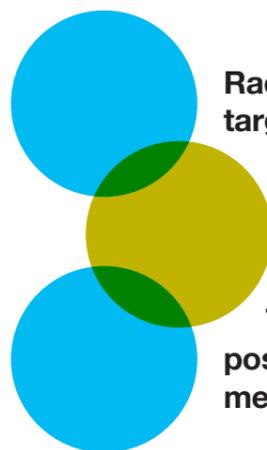
A Snapshot

December 2007



Commercial Radio

A Main Medium of Choice



Radio is personal, flexible, influential, targeted and enjoys high listener loyalty

Each week 77.6% of Australians tune in to commercial radio, listening on average for 2hrs 25mins each day

This significant reach and high time spent listening position commercial radio as a highly competitive medium nationally

Source: Nielsen Media Research, Radio Rating Survey 7, 2007 Mon-Sun 5.30am-12MN, All people 10+

Radio in a Multimedia Environment

Commercial radio audience is growing despite the wide range of technology choices and competition for consumer's time.

Radio remains the 'most personal' of media; it is interactive, live, local, human and omnipresent. It provides genuine entertainment, an opportunity to hear new music and access instant information.

The radio industry is embracing emerging technologies to continue to foster its close relationship with listeners and to complement existing radio technology.

The 2007 midnight to dawn survey also shows that radio has increased its relevance among young people despite the presence of other media platforms such as the Internet, iPods and interactive television.

Commercial radio listening midnight to dawn summary:

- 15.1% of Australians tune in each week and listen for 3hrs 6 mins on average.
- 17.3% of people 18-24yrs tune in.
- 7.8% of people 10-17yrs tune in.
- 16.5% of listeners are 55+yrs and 11% 25-39yrs.
- People 10-17yrs listen for 3hrs 36 mins each week.

Source: Nielsen Media Research, Radio Rating Survey 7, 2007, Mon-Sun 12MN-5.30am, all people 10+ unless otherwise stated.

Radio Complements Internet

Radio and the Internet can be consumed simultaneously.

Radio delivers up-to-date messages and entertainment without making any demands on the consumer.

Radio is the best medium to direct people to web sites for more detailed information.

As the primary 'at work' medium, radio is ideal for reaching Internet users in the work place.

Radio adds a strong emotional profile to an Internet message.

Of all commercial radio listeners:

- 91% access the internet daily.
- 67% search for information on products online.
- 51% access the internet weekday mornings, 46% afternoons.
- 59% listen to the radio and are online weekday afternoons.
- 57% access news/ current affairs online.
- 44% search for travel information online.

Source: Nielsen Media Research, Panorama, Fused Metro Survey 7, 2007

Podcasting and MP3 Devices

Podcasting is an example of another useful tool for communicating and interacting with listeners.

Downloading podcasts to MP3 players is still a niche activity:

- 41% of people 14yrs+ own an MP3 device.
- 34% of MP3 device owners have downloaded a podcast, this increases to 40% among owners 18-24years.
- 52% of MP3 owners are 25-39yrs.
- 59% of MP3 owners are under 40yrs.
- 74% of people 14-17yrs own an MP3 device.

Radio is important to MP3 owners – they spend more time listening to commercial radio than to their MP3 players.

45 percent of MP3 owners listen to seven hours or more of commercial radio each week compared to only 4 percent who listen to MP3 devices for seven hours or more.

57 percent of MP3 device owners usually listen to AM/ FM radio weekday breakfast and 94 percent access the Internet daily.

71% of 18 – 24 year olds who say that radio advertising really stands out have an MP3 player.

30% of MP3 owners 14-17 years listen to the radio online.

Source: Nielsen Media Research, Panorama, Fused Metro Survey 7, 2007.

Digital radio will be rolled out across six cities in Australia from 1 January 2009



Digital Radio

What is Digital Radio?

- Digital is the exciting future of radio. AM radio was launched in the 1920s and FM radio in the late 1970s. Digital radio is the third generation of radio.
- Digital radio uses a revolutionary audio broadcasting technology, which improves sound quality and enables you to receive innovative new features through your radio.
- Digital is a new way of transmitting and receiving radio signals. It turns sound and data into digital signals at the transmission end. These are broadcast over the airwaves and a digital radio receiver decodes the signal into high quality sound with data enhancements.
- Digital receivers are different from current radios that pick up AM and FM bands. A digital radio has a digital chip inside which allows it to tune VHF Band III and/or L-Band as well.

Rewind or pause to control your listening

Digital Puts Listeners in Control

- Easy tune – select stations by name from a menu on a display screen.
- Access dynamic text about song titles, traffic and news updates, stock prices and more.
- Access multi-layered programs and data channels including images, CD covers, slide shows, tour dates, coupons and audio highlights.
- Rewind or pause digital radio.

Benefits to Advertisers

Impact – advertisers can have their brand name, tagline and phone number scrolling across the screen adding impact to the audio advertisement.

Immediacy – access to more detailed information.

Reach – by integration into other digital devices – MP3 players, mobile phones, hi-fis and PDAs.

Visual – ability to add an audio message with simple text and, as receivers get more sophisticated, with GIF, JPEG and HTML files.

Digital Radio Rollout

Digital radio will be rolled out across six cities in Australia from 1 January 2009, with commercial radio stations launching services in Sydney, Melbourne, Brisbane, Adelaide, Perth and Hobart.

Between now and launch date, Commercial Radio Australia is working with the national public broadcasters ABC and SBS to develop the best transmission network for Australia. Commercial radio stations that have been involved in trials are 2DayFM, Nova 969, Vega, Triple M, 2SM, 2GB, 2CH, WSFM, 2KY and 2UE.

Digital radio will be implemented using the international Eureka 147 DAB+ standard, a powerful technology that offers superior audio capabilities and spectrum efficiency. Broadcasters are working with receiver and chip manufacturers and retailers to bring a wide ranging of exciting DAB+ radios to market in time for the launch.

Radio in Combination with Other Media

Radio is complementary to other media. Radio can extend the reach of a campaign, focus the delivery, add to the frequency and enhance or reinforce a message.

Radio Complements Television

Television audiences are becoming more fragmented while radio maintains strong overall listenership, particularly across the day.

Radio and television are logical partners with radio's strength across the day, when stores are open, complementing the branding qualities of a television campaign in the evening.

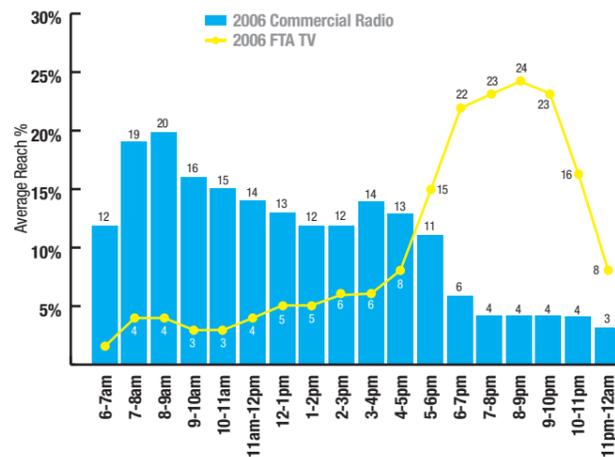
Radio reaches mobile people where television cannot and radio listeners are station loyal as well as program loyal.

Radio Research – Radio's Advantage – Advertising Effectiveness Study

Released in 2006, a Millward Brown radio advertising effectiveness study showed that radio, used in combination with television, produces better results than using television alone.

Visit commercialradio.com.au for a range of sales support material available to download.

Commercial Radio vs Free to Air TV 2006



Radio Source: Nielsen Media Research, Averaged over five capital cities, average audience, Survey 1-8, 2006, all ppl 10+. TV Source: OzTam, .five city total average audience, weeks 1-52 2006, all ppl 10+ unless otherwise stated

The objective of the study was to show how a radio and television combination is more effective at raising sales and awareness than television alone. It involved reallocating 20 percent of a television advertising budget to radio and measuring the increase in brand awareness and sales.

The study was conducted in Perth and Brisbane across two Fast Moving Consumer Goods (FMCG) brands, traditionally among the largest spending categories in all advertising.

The study involved test (80 percent television, 20 percent radio) and control (100 percent television) markets, using two brands in the FMCG category, a lesser-known personal hygiene product and a well-known food brand. It's findings support similar research conducted in the USA and UK in recent years, which showed radio advertising has a strong multiplier effect when used in combination with television.

The key findings include:

- Reallocating 20 percent of a television budget to commercial radio has been proven to increase brand awareness by 22 percent.
- Even among well-known brands, reallocating 20 percent of a television budget to commercial radio has been proven to increase brand awareness by six percent.
- Even among well-known brands, reallocating 20 percent of a television budget to commercial radio has been proven to increase sales by up to 15 percent.

Brand Campaign

Background

The Industry wide on air Commercial Radio Australia Brand Campaign has been running for four years and continues to attract enormous attention. The campaign is targeted towards advertisers and marketers and aims to increase radio's share of the total media advertising pie.

A great example of effective use of the medium, the creative is refreshed regularly to combat campaign fatigue with the key message of "during the day, radio is twice as effective as television at reaching your audience" remaining until recently.

Stage five of the campaign explains to advertisers how to effectively target listeners by adapting their message to the time of day and place of listening for their target. It's based on the simple premise that on radio there is a time and place for everything.

Campaign Hits the Mark

The fifth phase of the campaign, developed by award winning agency Eardrum, examines listening trends for key advertising demographics. It highlights that by targeting different messages to different listeners, at the correct time, a commercial may have greater impact and cut-through than one scheduled randomly.

Humour remains a key element of the campaign with the bumbling interviewer played by comic Mark Mitchell. Mark is familiar to audiences from the previous campaigns and in this phase develops a relationship with 'Ian Mitcham' a fictional senior media executive.

Stage Five Implementation

A series of teaser commercials aired to promote the concept that on radio there is a time and place for everything. Following on from the teaser ads a number of strategically positioned commercials ran specific to the time of day aired.



The approach allows radio to lead by example in positioning commercials strategically.

Visit commercialradio.com.au for a range of sales support material available to download.

Radio remains the 'most personal' of media

Radio Creative

Segmentation of Creative

Radio commercials can be created in a variety of styles. Creative can be changed on virtually a day-to-day basis to match consumer response.

Different creative can be prepared for various times of the day reflecting the consumer's mood and frame of mind.

Radio commercials can evoke visual images in the minds of listeners.

Radio commercials can be tailored with a base ad and local content inserted cost effectively.

High quality creative and low production cost allows more money to be spent on advertising impact.

Radio advertising is now being taken very seriously at an international creative level and the industry's own campaign reflects the great strength of good Australian radio ads. Today's advertising climate is also highly competitive and very cluttered making it imperative for advertisers to use effective and efficient mediums for their message to get through – radio is often the best answer.

Creative Research

It has been proven that branding and likeability in radio commercials are effective creative attributes and linked to driving higher awareness and overall advertising impact.

Identifying specific creative attributes of effective radio campaigns, the effectiveness of various creative executions and the ability of radio to drive call to action formed an objective of Radio's Advantage – Advertising Effectiveness Study.



In 2007, the winner of the Gold Siren Award was also acknowledged in Cannes by winning the Radio Grand Prix.

Radio Drives Call to Action

The personal hygiene brand tested in the effectiveness study was a new campaign to radio and supplemented an established, emotionally focused television creative. The **radio creative** featured a strong call to action message and radio's role was to drive consumers to an informational website to learn more about the product.

The radio message was simple and uncluttered and was the only medium to mention the website.

Tracking during the study showed an increase in web hits of a massive 61% to the client's website as a result of the single-minded radio creative.

Radio Increases Purchase Intention by 13%

Additionally, consumers exposed to the radio creative showed an increase in intention to purchase by 13% compared to those exposed to television only.

Radio and Branding

The iconic, well known food brand used strongly tested, branded creative concepts for their radio implementation to extend the branding concept developed in the television campaign.

Radio creative was strongly branded with distinct, well known style already established in earlier campaigns and featured consistent elements and strategy – same 'feel', theme, and voice.

Results showed that the radio execution improved consumer response to TV execution.

Radio creative drove up overall enjoyment of the TV advertising by 14%.

Source: Radio's Advantage – Advertising Effectiveness Study, 2006.

Siren Awards

Siren Awards are the national advertising awards honouring excellence in commercial radio advertising. The Siren Awards, held annually, are an initiative designed to improve the standard of radio creative in Australia and to promote the importance of creativity as a way to make radio advertising more effective. It helps raise the profile of exceptional radio creative and ensure Australia is world class in this area. The awards provide important peer recognition for writing exceptional and innovative creative for radio.



In 2007, the winner of the Gold Siren Award was also acknowledged in Cannes by winning the Radio Grand Prix. Proof that Australian radio creative is world class.

SiVi

A Siren viral creative initiative was launched in September 2006. A website called SiVi features the best and most unusual audio to be used for inspiration and ideas for radio advertisements.

SiVi is all about inspiration with visitor's submitting their own material and the page becoming a creative portal of original, unusual and funny audio.

The viral campaign is aimed at getting people excited by different, quirky and out-there examples of audio – the sort of stuff that is so compelling that people want to talk about it and share it with their friends.

The SiVi site (short for Siren Viral) can be found as part of the Siren Awards website, sirenawards.com.au

Strengths of Radio

Radio reaches virtually everyone in many environments – at home, in the office, car or while out and about.

Radio cuts through – it is the medium that people spend most time with throughout the day providing ample opportunity for a message to reach its audience.

An anywhere, anytime medium – radio's portability gives advertisers the opportunity to reach people on the go. The accessibility of radio enables listening to occur in places that other media have difficulty reaching.

Targeting – radio messages can be tailored and localized for an audience, targeting specific demographics and communities, geographic areas, and events in a market.

Pulse of the community – people listen to the radio to find out what is happening in their community such as special events, news, traffic updates, weather reports, sport, entertainment.

Consistent all year round – radio does not have a noticeable summer audience decline.

Influential – influences consumers closest to the time of purchase, building top-of-mind awareness.

Cost Effective – radio offers reach, frequency, impact and economical advertising solutions for advertisers.

Flexibility – urgent, immediate and flexible – radio commercials can be created quickly without the production costs and delays of other media.

Strong call-to-action – selective and specific scheduling enables messages to be delivered close to purchase when listeners are most likely to act.

A competitive medium – the growth of national talk and music programs and off-air promotions has made radio more attractive to national advertisers, and more competitive as a national media.

Revenue and Expenditure Growth

Financial Year 2006/2007

- Metropolitan radio advertising revenue grew 3.7 percent to \$619.5 million up from \$597.2 million for the same timeframe a year ago.
- Across the five main capital cities – Brisbane (up 4.8 percent to \$94.9 million); Melbourne (up 3.9 percent) to \$174.4 million); Perth (up 13.7 percent to \$70.5 million); Adelaide (up 6.8 percent to \$58.3 million); and Sydney (down 0.3 percent to \$221.4 million).

Source: PricewaterhouseCoopers Radio Revenue Performance Figures, 12 months financial year to June 2007.

January-June 2007

- Radio advertising revenue increased by around 5 percent (5.3%).
- Metropolitan radio advertising revenue grew around 7 percent (7.1%) to a total of \$301.0million.
- Regional radio advertising revenue grew by 3.82% to a total of \$150,237.

Source: Advertising Expenditure in Main Media Report, Commercial Economic Advisory Service of Australia (CEASA), Jan-June 2007.

Radio Financial Results 2005-2006

In 2005-2006, commercial radio licensees generated \$1.1b in revenue, with \$800.3m going to expenses.

Amount of revenue generated represents a 5.5% increase over the previous year's amount of \$947.8m

A broadcasting profit of \$199.87m was up by 17.3% compared to 2004-2005 (\$170.3)

Total radio advertising revenue increased by 2.9 percent to \$924.8 million for the 2006 calendar year, the industry's fifth successive year of growth.

Source: Advertising Expenditure in Main Media Report, Commercial Economic Advisory Service of Australia (CEASA), year ended 31 December 2006.

Total Advertising Expenditure in Main Media – (\$000)						
Media	2004	% of 2004 total	2005	% of 2005 total	2006	% of 2006 total
Newspapers	3,637,247	34.95%	3,817,295	32.95%	3,793,317	31.87%
Magazines	664,379	6.38%	727,380	6.28%	749,169	6.30%
Publications	1,596,569	15.34%	1,708,903	14.75%	1,551,218	13.03%
Television	3,265,520	31.38%	3,376,102	29.15%	3,419,738	28.72%
Radio*	841,631	8.09%	897,515	7.74%	924,793	7.77%
Internet*			620,000	5.35%	1,001,000	8.41%
Outdoor	327,120	3.14%	353,772	3.06%	378,729	3.18%
Cinema	74,148	0.71%	83,595	0.72%	85,500	0.72%
	10,406,614		11,584,562		11,903,464	

*Internet first reported in calendar year 2005 figures

*Radio includes community radio

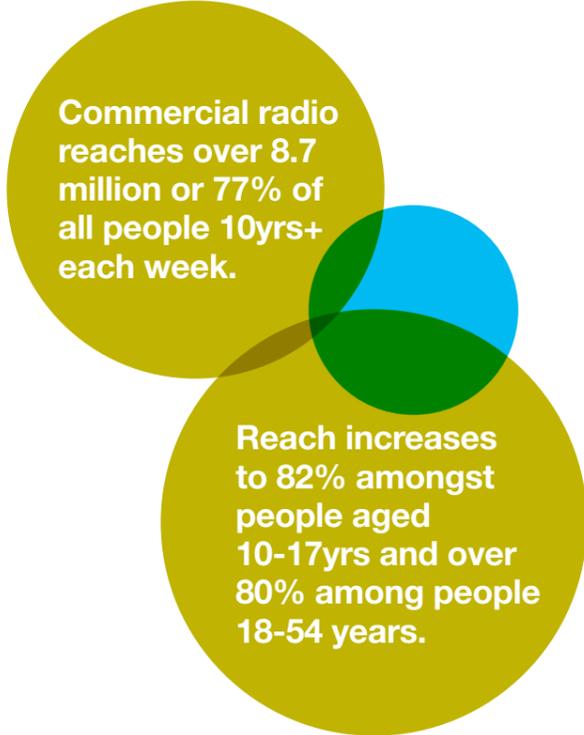
Source: Advertising expenditure in Main Media Report, Commercial Economic Advisory Service of Australia (CEASA) year ended 31 December 2006.



Metropolitan Australia Audience Fast Facts 2007

- Commercial radio reaches over 8.7million or 77% of all people 10yrs+ each week.
- Reach increases to 82% amongst people aged 10-17yrs and over 80% among people 18-54 years.
- Australian's spend a weekly average of 17 hours 29 minutes listening to commercial radio, or 2 hours 29 minutes each day.
- Time spent listening increases to 21 hours 46 minutes for people aged 55yrs+.
- Main Grocery Buyers listen on average for 18hrs 46mins weekly.
- 47% of people 40-54yrs listen to commercial radio in the car from 5.30am-9am Monday to Friday; while 44% of people 25-54yrs listen to commercial radio 4pm-7pm in the car Monday to Friday.
- 19% of people 25-39yrs tune into commercial radio Monday to Friday 12pm-4pm at work.
- 42% of people 55+ listen to commercial radio at home during weekday breakfast.
- 25% of people 18-24yrs listen to commercial radio in the car weekday evenings.
- 39% of people 40-54 yrs listen to commercial radio in the car weekday afternoons.

Source: Nielsen Media Research, Radio Advisor, Averaged over Five Capital Cities, Survey 1-3 2007, All People 10+, Mon-Sun 5:30am-12midnight unless otherwise stated.



Radio is both personal and portable, travelling with people inside and outside the home

Place of Listening

Radio is both personal and portable, travelling with people inside and outside the home. People spend the most time with radio throughout the day than any other medium.

- 56% of people 55+yrs listen to commercial radio at home for on average 19hrs 20mins each week.
- 26% of people 18-24yrs listen to commercial radio at work for on average 21hr 20mins each week.
- 67% of people 25-39yrs listen to commercial radio in the car for 6hrs 5mins each week.

Audience Measurement

- Nielsen Media Research is responsible for radio audience measurement for the Australian Radio Industry.
- The metro markets – Sydney, Melbourne, Brisbane, Adelaide and Perth are in survey for 39 weeks of the year. There are eight survey results released per year for these markets.
- Large regional markets, such as Newcastle, Canberra, Wollongong and the Gold Coast, are surveyed two to three times per year.
- Diaries are personally placed in proportion with the spread of the population. "Household flooding" is the current diary placement methodology used. That is, all people aged 10+ years in each household are given a diary.
- Participants are required to record their radio listening in the diary for one seven-day period, from Sunday through to Saturday.
- Diaries are personally collected at the end of the week, and after a ten-week period, (in capital cities, the first survey each year is generally a shorter period with larger weekly samples), the completed diaries are then processed to produce data relating to an average week of the survey period.
- Some of the radio survey terms show:
 - Share of listening – station Share of all listening in a market.
 - Average Audience – average quarter hour audience.
 - Time Spent Listening (TSL) – in hours and minutes.
 - Cumulative Audience (Cume) – number of different radio listeners.

Over 61,000 different people participated in radio audience surveys nationally in 2006 – 50,063 in Metro markets and 11,164 in Regional markets.

Electronic Measurement

The radio industry in Australia has adopted an approach of continuous improvement in the area of audience measurement. The diary system is the worldwide currency for radio audience measurement and is the methodology used in Australia.

There is currently very limited use of electronic measurement for radio globally. Where it has been introduced there have been a range of issues with the system. There are also a number of trials underway across the world involving current and developing electronic devices.

The fundamental issues of concern with available electronic radio measurement devices include compliance, sampling techniques and unexplained variations to some listening patterns. While variations may also be linked to non-compliance or non-carriage of devices, there has been no satisfactory explanation provided, or known remedial action taken, by device manufacturers to date.

Commercial Radio Australia has commenced preliminary work with both Nielsen Media Research and Ipsos to investigate the technical aspects of two new devices in development which both use mobile phones as the platform for the devices. The results of these technical tests and any further follow up, combined with results of consumer trials planned in the UK, Canada and USA into 2008, will help the Australian industry determine the future for electronic testing in Australia.

Average Weekly Reach (%) by Location				
Age	Home	Work	Car	Elsewhere
People 10+	51.2	16.2	60.0	9.3
People 10-17	55.1	5.4	64.2	14.6
People 18-24	47.9	25.5	62.8	14.1
People 25-39	46.2	23.5	67.7	10.0
People 40-54	51.2	20.1	67.9	8.0
People 55+	55.7	6.4	42.4	5.2
Male 10+	47.1	19.6	59.5	8.3
Female 10+	55.2	12.9	60.6	10.2

Time Spent Listening (hh.mm) by Location				
Age	Home	Work	Car	Elsewhere
People 10+	11.6	20.2	6.0	3.2
People 10-17	7.4	12.4	3.6	2.9
People 18-24	6.9	21.2	6.1	3.4
People 25-39	7.9	20.8	6.5	3.1
People 40-54	10.2	20.8	7.0	3.2
People 55+	19.2	18.7	5.2	3.1
Male 10+	9.9	22.5	6.4	3.4
Female 10+	12.8	17.1	5.4	3.1

Source: Nielsen Media Research, Radio Advisor, Averaged over five Capital Cities, Mon-Sun 5:30am-12midnight, Survey 1-7 2007

Regional Radio Audience Fast Facts

Nearly 40 percent of Australians live in regional areas.*

Despite common belief regional Australia is not indifferent to metropolitan Australia.

Commercial radio reach across the day in regional areas mirrors radio listening in metro markets and complements television reach in the evening as in metro areas.

Regional Australian's are also less likely to change radio station when an ad comes on than in metro areas.

Commercial Radio Listening Across the Day

Commercial radio reaches the majority of Australian's each week, particularly across the workday during business hours. 72% of Australians tune in to commercial radio Monday to Friday 5:30am to 7pm. This increases to 75% among people 25-54 years. Breakfast remains the most listened to session, with 58% of people tuning in weekly. Time spent listening to commercial radio Monday to Friday 5:30pm-7pm is on average 2hrs 38mins per day.

Cumulative Audience

Cumulative Audience (Reach %) – Five Capital Cities Survey 1-7 2007 Average Mon-Fri By Session					
	Breakfast	Morning	Afternoon	Drive	Evening
People 10+	58.4	44.3	48.9	49.8	30.2
People 10-17	56.1	22.7	45.3	46.4	34.7
People 18-24	56.9	46.6	49.5	56.8	37.1
People 25-39	61.2	48.0	51.9	55.8	31.4
People 40-54	64.6	47.7	52.9	54.4	30.2
People 55+	51.8	46.0	43.5	38.1	23.8
Male 10+	57.3	40.5	45.7	48.4	28.9
Female 10+	59.5	47.9	52.0	51.2	31.4

Time Spent Listening

Time Spent Listening (hh.mm) – Five Capital Cities Survey 1-7 2007 Average Mon-Fri By Session					
Age	Breakfast	Morning	Afternoon	Drive	Evening
People 10+	5.1	5.2	5.2	3.1	2.7
People 10-17	3.1	2.3	2.3	2.3	2.6
People 18-24	4.2	4.9	5.7	3.3	2.7
People 25-39	4.5	5.1	5.7	3.2	2.3
People 40-54	5.3	5.3	5.6	3.2	2.3
People 55+	6.6	5.6	5.2	3.2	4.0
Male 10+	5.3	5.9	6.0	3.3	2.8
Female 10+	4.8	4.5	4.5	3.0	2.7

Source: Nielsen Media Research, Radio Advisor, Averaged over 5 capital cities, Survey1-7, 2007, Mon-Fri

48% of regional Australian's talk about what they hear on the radio.

Regional Australia profile:

- 63% are commercial radio listeners.
- 48% talk about what they hear on the radio.
- 49% listen to the radio for information/news on their city.
- 63% have purchased at a department store in the past month.
- 43% always listen to the radio on the way to work.
- 91% access the internet daily.

Regional Australians are equally or more likely as people in metro areas to:

- Agree that grocery ads influence shopping habits.
- Trust their favourite radio stations to inform.
- Agree that when children come shopping they spend more.
- Visit the supermarket everyday.
- Switch food brands for bargains/specials.
- Interested in getting a personal loan.

* Source: Nielsen Media Research, Panorama, Survey 4 National (June 06 - May 07)

Source: Nielsen Media Research, Panorama National Survey 2 (Apr 06 - Mar07) 2007, All people 14+ unless otherwise stated.

17% of people 18-24 years listen to more radio since the internet.

Media Attitudes

- 10% of people 14-17 years listen to more radio since the Internet.
- People 18-24 years+ are 42% more likely to trust ads with a radio personality than the average person.
- 58% of people 40-54 years and 52% of people 25-39 years always listen to the radio on the way to work.
- 51% of Main Grocery Buyers talk about what they hear on the radio.

Of all commercial radio listeners:

- Only 23% change the station when an ad comes on, compared to 34% who do not change the station. Additionally, 50% of heavy listeners (listen 16hrs+ each week) do not change station when an ad comes on.
- 80% agree that grocery ads influence their shopping behaviour.
- 57% shop a lot for specials/bargains.
- 52% like to try new food products.
- 62% switch food brands for bargains/specials.
- 91% access the Internet daily.
- 40% seek professional advice when investing money.
- They are 8% more likely than the average person to run their business from their mobile phone.
- 34% own their own home.
- They are 6% more likely than the average person to look out for new brands at the supermarket.
- 21% shop before 1pm weekdays and 15% from 1-5pm weekdays.

Source: Nielsen Media Research, Panorama National Survey 2 (Oct 06 – Sept 07), All people 14+ unless otherwise stated.

Commercial Radio Landscape

There are 261 commercial radio stations across Australia.

- All 261 are currently operating (on air).
- 260 are members of Commercial Radio Australia.

Of the 261 commercial radio stations that are on-air, there are:

- AM licences – 110, FM licences – 151. Split of Metro / Regional Commercial Radio Stations
- Metro – 42, Regional – 219.
- 35 operators own commercial radio member stations.

Of the 35 operators, 13 radio networks own 80 percent of the stations.

- The 13 networks include:

Ace Radio Broadcasters Pty Ltd, Austereo Pty Ltd, Australian Radio Network Pty Ltd, Capital Radio, DMG Radio Australia, Grant Broadcasters, Macquarie Radio Network, Macquarie Regional Radioworks, Prime Radio Pty Ltd, Redwave Media, Star Broadcasting Network, Super Network Radio and Fairfax (Southern Cross) Broadcasting.

Population and Commercial Radio Stations in Australia

The table below outlines the population figures as well as the number of operating Commercial Radio Stations across Australia as at December 2006.

Population and Commercial Radio Stations in Australia					
State	'000	Commercial radio stations in each state	Capital city	'000	Commercial radio stations in each capital city
NSW	6,854.8	82	Sydney	4,119.1	11
VIC	5,165.4	41	Melbourne	3,592.5	11
QLD	4,132	62	Brisbane	1,763.1	8
SA	1,575.7	17	Adelaide	1,105.8	6
WA	2,081	37	Perth	1,445	6
TAS	491.7	13	Greater Hobart	200.5	4
NT	212.6	5	Darwin	105.9	2
ACT	336.4	4	Canberra	323	4
AUSTRALIA	20,852	261			

Source: ABS Publication 3101.0 Australian Demographic Statistics. December 2006.



Commercial Radio Australia

A.C.N. 059 731 467 A.B.N. 52 059 731 467

Level 5

88 Foveaux Street

Surry Hills

NSW 2010

T: 02 9281 6577

F: 02 9281 6599

E: mail@commercialradio.com.au

I: www.commercialradio.com.au

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