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ABC Appreciation Survey

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Prepared for

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1. Executive summary

Background

- This report presents findings from the fourth in the series of ABC Appreciation Surveys, the most recent being conducted in June 2003. 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.
- The 2003 research was based on telephone interviews conducted nationally among 1,900 people aged 14 years and over.

Overview.

- Overall the 2003 results show community beliefs and opinions about the ABC remain largely unchanged compared with 12 months ago. Most continue to feel the ABC performs a valuable role, provides quality content, and when asked, believe it is doing a good job in fulfilling its various charter obligations.
- At the same time, some small improvements are evident in relation to beliefs about the ABC being efficient and well managed, distinctively Australian, balanced and even handed in its reporting, and in broadcasting programs of an educational nature.
- Moreover looking over the series of four surveys, a small positive trend is emerging in relation to perceptions about the quality of ABC Television and Radio programming.
- As noted in 2002, the survey findings continue to point to an opportunity for the ABC to improve its relationship with teenagers and younger adults. However there are improvements among 18 to 24 year olds concerning the appeal of ABC television, and usage of the ABC website.

Overall value of the ABC

Consistent with previous surveys, nine-in-ten Australians believe the ABC provides a valuable service to the community, and half believe it provides a very valuable service.

However compared with 12 months ago, small declines have occurred in the proportion of people aged 50 years and over, and those in country / regional areas believing the ABC and its services are valuable. Notwithstanding these decreases, the proportion of people within these segments who believe the ABC and its services are valuable is still *very high* (almost 90 percent).

Television

- Eight-in-ten Australians believe the *quality of programming* on ABC Television is very or quite good while only half as many (41 percent) express this view about commercial television. Compared with 1999, there has been a small, but statistically significant improvement in the proportion who believe the quality of ABC programming is *very* good (up from 18 to 23 percent).
- A large majority (71 percent) also continue to believe ABC Television does a "good job" in terms of the number of shows it provides that they personally like to watch. This compares with 47 percent for commercial television (down from 51 percent in 2002).**
- Teenagers aged 14 to 17 continue to have less positive views about the ABC than commercial television concerning the number of shows worth watching. However among 18 to 24 year olds, the gap in perceptions between ABC and commercial television is less pronounced in 2003 than in 2002.

Radio

- A total of 60 percent believe the ABC provides good quality radio programming (8 percent feel it is poor), while 55 percent believe commercial radio offers good quality programming (and 30 percent feel it is poor). About one-third are unable to rate ABC Radio.
- Similarly, 56 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 55 percent for commercial radio.

- Firstly, 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.
- Secondly, the data show that heavier users of ABC Television are very critical of commercial TV, while other people are more even-handed in their appraisal of ABC commercial television.

^{**} This finding is perhaps surprising given audience ratings. However there are a couple of issues to consider:

- Over time, the proportion who rate ABC Radio as "*very good*" in terms of quality, and in terms of the amount of programming people say they like to listen to, appears to be trending upward with small increases compared with 1998.
- For commercial radio, the 2003 results show an improvement in perceptions among 14 to 17 year olds, in terms of quality and appeal of programming.

Online

- In 2003, 20 percent of Australians claim to ever use the ABC website, compared with 18 percent in 2002. This change is not large enough to be statistically significant.
- Consistent with 2002, about 90 percent of the ABC site's users believe it provides good quality information, though the proportion who believe it is *very good* is up from 32 percent to 38 percent.
- Among Internet users, 20 percent claim to use the ABC website either regularly or from time to time specifically for news and current affairs information. This compares with 45 percent for ninemsn, and around 10 to 15 percent for each of The Sydney Morning Herald, The Age and The Australian newspaper websites, as well as News Interactive.
- ninemsn being a homepage (either through personal choice or default) continues to be a key driver behind its prevalent usage, whereas impartiality, relevance of content and to a lesser extent timeliness and its Australian / local perspective are more likely to be reasons for usage of the ABC site.

Coverage of country news and information

- Many more Australians (76 percent) believe the ABC does a good job covering country / regional issues than believe this about commercial media (42 percent) and this continues to be apparent both among people in capital cities and people in country / regional areas.
- In 2003, there was a small increase in the proportion who rate the ABC as very good on covering country and regional information. [So although 2003 saw a small decrease in country people believing the ABC provides a valuable service to the community, this change is <u>not reflected in perceptions about the ABC's coverage of country / regional issues</u>].

■ In 2003, perceptions about commercial media coverage of country / regional issues improved slightly, after a marked deterioration in 2002.

Other specific charter obligations

- As found in previous years, the majority of Australians also believe the ABC is doing "a good job" in meeting various other charter obligations covered by the research.
- The dimensions on which the community has the mostly strongly formed, positive perceptions are in relation to the ABC:
 - broadcasting programs that are different from those on commercial television and radio; and,
 - broadcasting programs of an educational nature.
- Overall, the results are fairly stable, though for several areas the number who feel the ABC is doing a very good job has increased. The largest gains occurred for:
 - being efficient and well managed;
 - being distinctively Australian and contributing to Australia's national identity;
 - being balanced and even-handed when reporting news and current affairs; and,
 - broadcasting programs of an educational nature.
- There has been no further deterioration in perceptions about the ABC encouraging and promoting Australian performing arts.
- The issue of "being balanced and even handed" was also explored more specifically in relation to the ABC's flagship News and Current Affairs programs (the 7pm News, 7.30 Report, The World Today, AM and PM). As found in 2002, the vast majority of users believe these programs are doing a "good job" of being balanced and even-handed.

News and Current Affairs Content

- The survey explored community perceptions about the amount of coverage given by the ABC to specific news and current affairs issues.
 - Among ABC users*, on nearly all issues, a majority continue to feel the amount of coverage is "about right".
 - A number of statistically significant changes occurred in 2003, including:
 - a decline in the number believing there is too much coverage of immigration issues (a reversal of the trend since 1998);
 - an increase in the proportion who think there is the right amount of coverage of sports news.

On the other hand:

- an increase in the proportion believing there is too much coverage of federal and state politics;
- an increase in the number who think there is not enough coverage of local politics;
- an increase in the proportion who think there is not enough coverage of industrial relations issues.

. . . .though again, a majority believe the amount of coverage of federal politics, state politics and industrial relations is "about right".

^{*} Those who claim to use the ABC for news and current affairs information at least once a fortnight

2. Background and objectives

- This report presents findings from the 2003 ABC Appreciation Survey, which follows similar studies conducted in 1998, 1999 and 2002. 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 and attitudes towards the ABC website;
 - the ABC's coverage of country news and information;
 - sport coverage;
 - the extent to which the ABC fulfils various other charter obligations;
 - the even-handedness of ABC news and current affairs reporting;
 - the amount of coverage given to various news and current affairs issues.
- 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, radio listening and internet usage were also collected for cross-analysis purposes.

3. Methodology

- The research was conducted nationally, by telephone, among 1,900 respondents aged 14 years and over. Fieldwork was conducted by fully trained and personally briefed interviewers between 2-4 and 10-15 June 2003.
- 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 was set for each telephone area code;
 - random selection of household telephone numbers drawn from current telephone listings for each area code;
 - random selection of an individual in each household by a last birthday screening question.
- 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, age left school, sex and area.

Heavy, Light and Non-users of the ABC

In order to explore attitudes according to people's *usage* of ABC services, the sample was segmented into heavy, light and non ABC users. The segments were based on respondent's own assessment of how much time they spend watching ABC Television, or listening to ABC Radio. Of course these self-assessments may not be particularly accurate, however 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 all respondents	ABC Radio Listening Segments % of all respondents
Heavy	6 or more hours per week	41	28
Light	Less than 6 hours per week	42	27
Non	0 hours per week	18	46

3. Methodology

- Combined ABC Television / Radio segments were also defined as follows:
 - Heavy: either heavy viewer of ABC Television or heavy listener of ABC Radio (52 percent);
 - Non viewers / listeners: non ABC viewer and non ABC listener (13 percent);
 - Light: watch ABC Television or listen to ABC Radio, but not heavy user of either (35 percent).
- In relation to segment profiles, heavy ABC users (regardless of the medium) show a bias towards older people, particularly those aged 50 years and over.
- Further details about definition of the segments can be found in the 2003 computer table report provided under separate cover.

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

Research findings

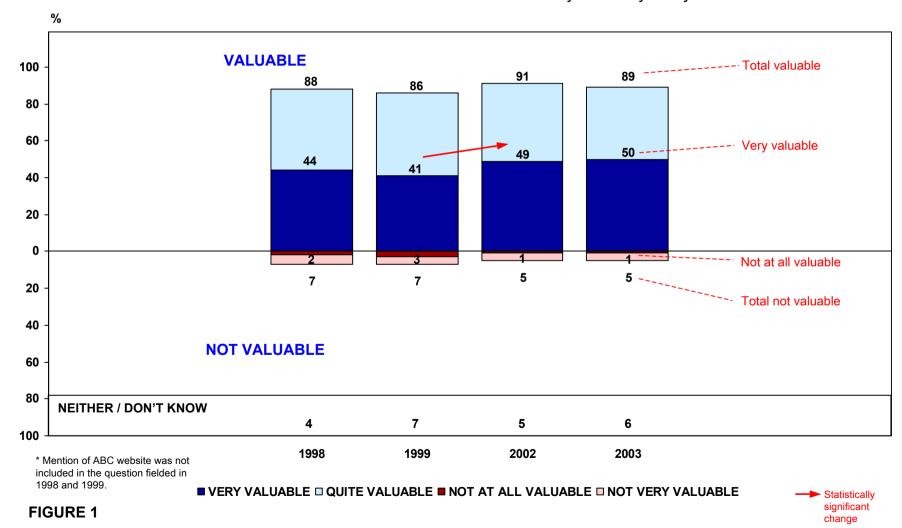
4.1 Overall value of the ABC

- In line with previous surveys, the vast majority (89 percent) of Australians continue to believe the ABC provides a valuable service to the community - and 50 percent a very valuable service (Figure 1).** Overall there has been no statistically significant change compared with 2002.
- Analysis of the results by demography and ABC media consumption segments shows:
 - As noted in the 2002 survey, usage of ABC services is a key driver to perceptions that is, the more people use the ABC the more likely they are to believe in the value of the ABC. For example:
 - among heavy ABC Television / Radio users, 96 percent believe the ABC and its services are valuable (and 62 percent very valuable);
 - among light users 89 percent believe the ABC provides a valuable service (41 percent very valuable);
 - while 61 percent of non-users believe it is valuable (26 percent very valuable).
 - Correlated with this, belief in the value of the ABC increases across age groups (Figure 2).
- At face value, within demographic segments a number of changes have occurred over the past 12 months. However the only statistically significant changes were a decline in the proportion of people aged 50 years and over, and those in country / regional areas believing the ABC and its services are valuable. Notwithstanding these decreases, the proportion of people within these segments who believe the ABC and its services are valuable is still very high (almost 90 percent).

^{**}In 2002 and 2003 the survey was conducted in June, but the 1998 and 1999 surveys were conducted in December. Moreover in 2002 and 2003, the "value" guestion included reference to the ABC website but not in 1998 and 1999. It is unknown if these differences in timing or question wording have had any impact on results.

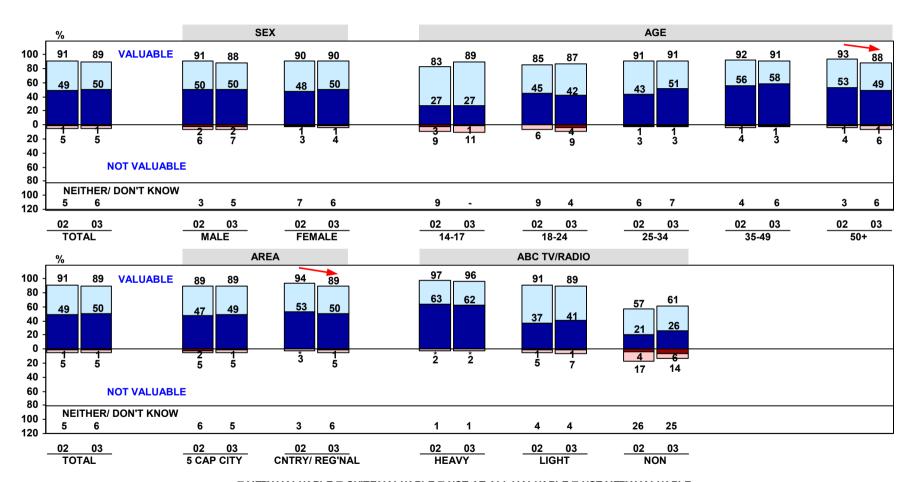
Overall value of the ABC*

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



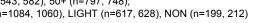
Overall value of the ABC

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



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

* LESS THAN 0.5 PERCENT





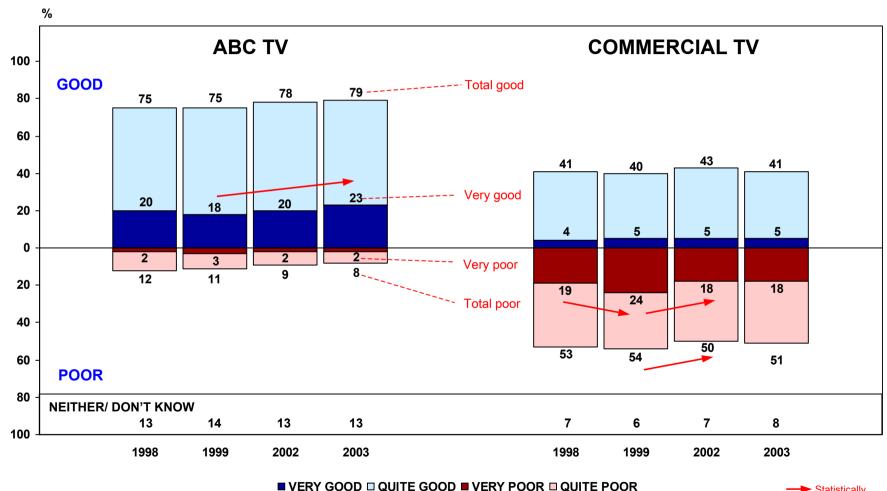
4.2 Television

4.2.1 Quality of programming

- Eight-in-ten Australians believe the *quality of programming* on ABC Television is very or quite good while only half as many (41 percent) believe this about commercial television.
- Compared with 1999, there has been a small, but statistically significant improvement in the proportion who believe the quality of ABC programming is *very* good (up from 18 to 23 percent) Figure 3.
- As found in 2002, perceptions about the quality of ABC Television are reasonably consistent across demographic groups. However for commercial television, young people under 25 are far more supportive than older people aged 35 years and over. Heavy ABC TV users are highly critical of the quality of commercial television Figures 4 and 5.
- Statistically significant changes between 2002 and 2003 were:
 - for the ABC: an improvement in perceptions about the quality of programming among 25 to 34 year olds, and lighter / non ABC viewers;
 - for commercial television: a decline in perceptions among women, and light ABC viewers.

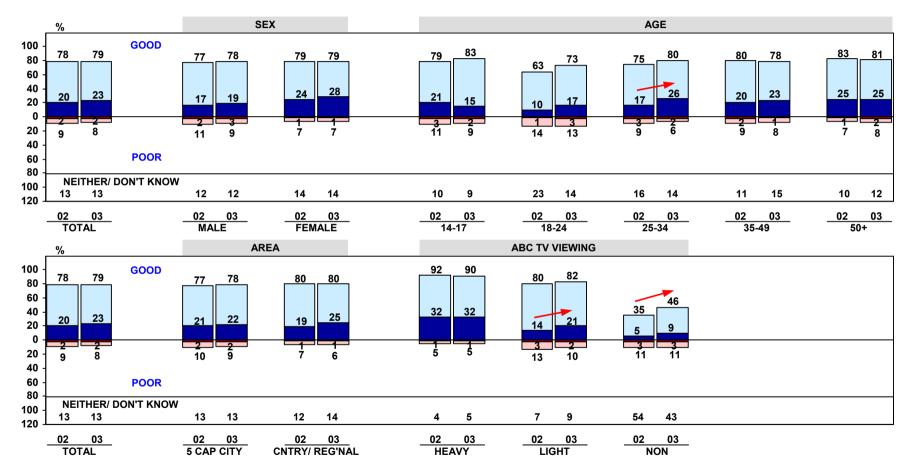
Television - Quality of programming

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?



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?



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

* LESS THAN 0.5 PERCENT

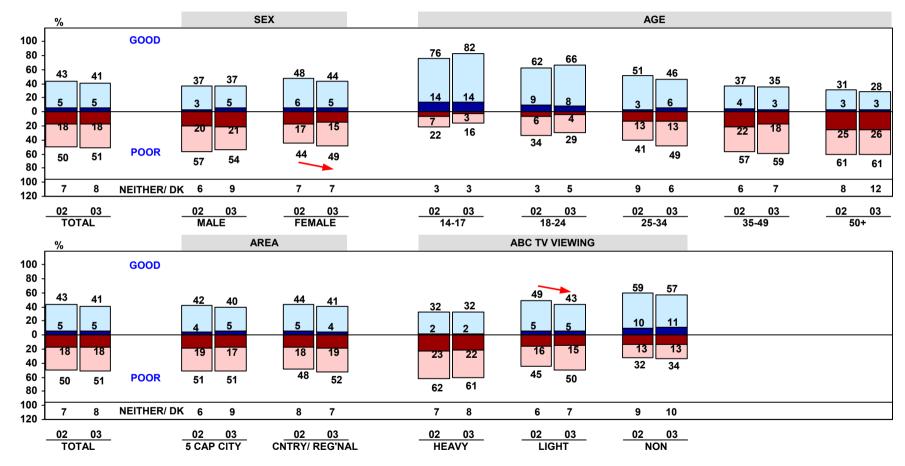
significant change



Statistically

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?



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

* LESS THAN 0.5 PERCENT

FIGURE 5



4.2 Television (cont'd)

4.2.2 The number of shows people like to watch

- A large majority (71 percent) also continue to believe ABC Television does a "good job" in terms of *the number of shows it provides that they personally like to watch*. This compares with 47 percent for commercial television (Figure 6).**
- Overall, compared with 12 months ago, perceptions about the ABC show no change, though within demographic segments, some improvement is apparent among males and 18 to 24 year olds. Conversely, perceptions about commercial TV have declined slightly (primarily among 25 to 34 year olds and light ABC viewers) Figures 7 and 8.
- Teenagers 14 to 17 continue to have less positive views about the ABC than commercial television concerning the number of shows worth watching. However among 18 to 24 year olds, the gap in perceptions between ABC and commercial television is less pronounced in 2003 than in 2002.

^{**} This finding is perhaps surprising given audience ratings. However there are a couple of issues to consider:

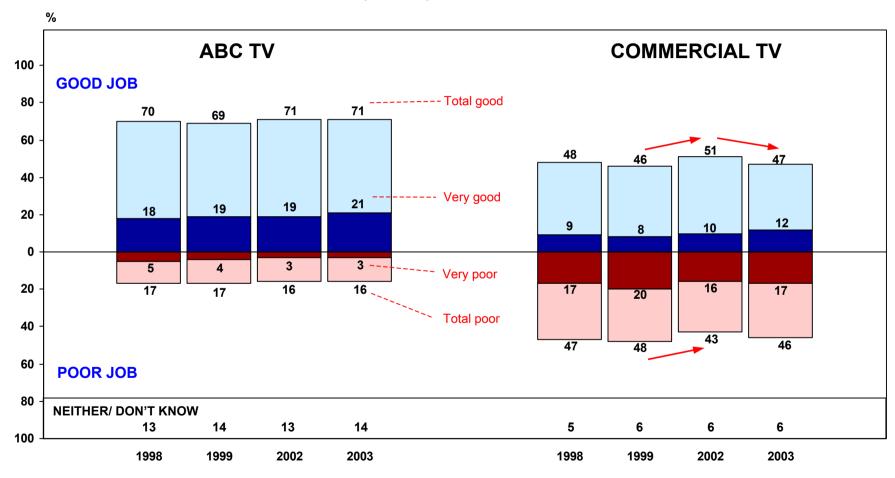
⁻ Firstly, we believe respondents answer this question relative to their expectations, and the role they have for ABC Television and commercial television in their lives.

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.

Secondly, the data show that heavier users of ABC Television are very critical of commercial TV, while other people are more even-handed in their appraisal of ABC vs commercial television.

Television - Number of shows you like to watch

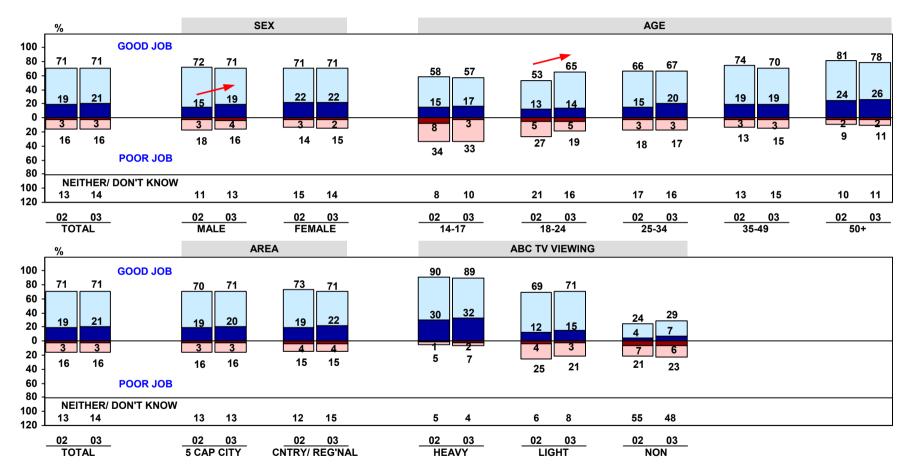
And overall would you say ... (TYPE) does a good job, or a poor job, in terms of the number of shows it provides that you personally like to watch?





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?

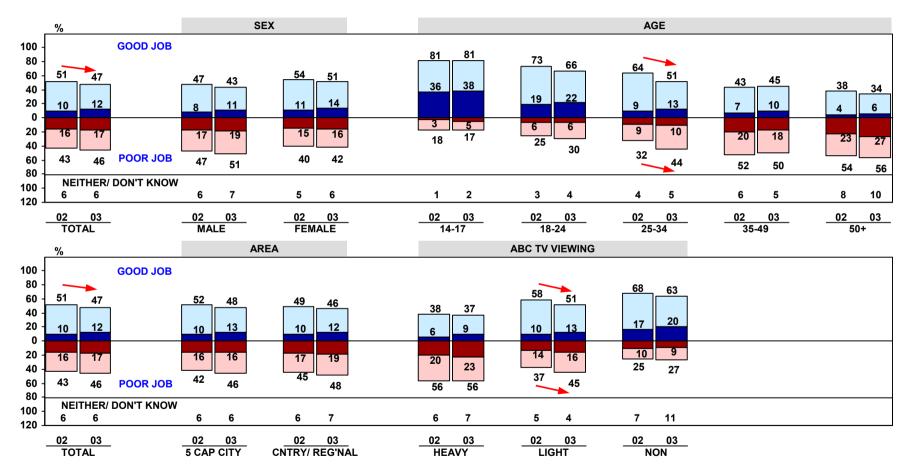






Commercial TV - Number of shows you like to watch

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?







4.3 Radio

4.3.1 Quality of programming

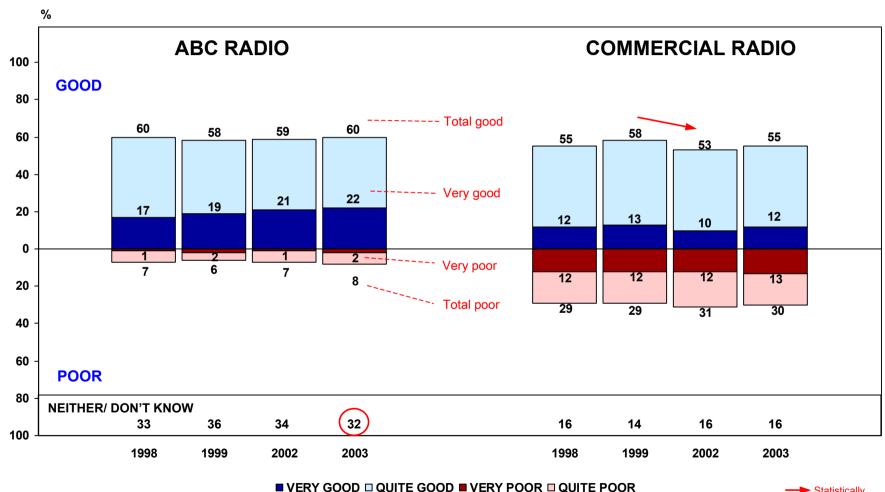
- Overall, as found in 2002, the gap in perceptions between ABC and commercial radio is less marked than for television. A total of 60 percent believe the ABC provides good quality radio programming (8 percent feel it is poor), while 55 percent believe commercial radio offers good quality programming (and 30 percent feel it is poor). About one-third are unable to rate ABC Radio - Figure 9.
- At the total sample level, perceptions about quality were quite consistent in 2003 vs 2002 for ABC Radio and commercial radio. Over time though, the proportion who rate ABC radio as "very good" appears to be trending upward, with a small, but statistically significant increase compared with 1998.
- Within demographic segments, a number of statistically significant changes were seen, perhaps the most interesting being an improvement in perceptions about commercial radio among 14 to 17 year olds (Figure 11).

4.3.2 Amount of programming personally like to listen to

- Similarly, 56 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 55 percent for commercial radio.
- Comparing 2003 and 2002, total sample results for the ABC are stable, though again, since 1998, a small but statistically significant trend in the proportion rating ABC Radio as "very good" is apparent.
- This year, perceptions about commercial radio have improved following a slight deterioration in 2002 (Figure 12). Again, in 2003, more 14 to 17 year olds have favourable attitudes about commercial radio than in 2002.
- As found in 2002, Heavy ABC Radio listeners appear to be even more supportive of ABC Radio than heavy ABC Television viewers are of ABC Television. For example while 32 percent of heavy ABC TV viewers say the ABC does a "very good job" in terms of the number of shows they like to watch, the equivalent figure for heavy radio listeners is 47 percent. So although ABC Radio listening is perhaps a more niche activity, its advocates feel particularly favourably towards it.

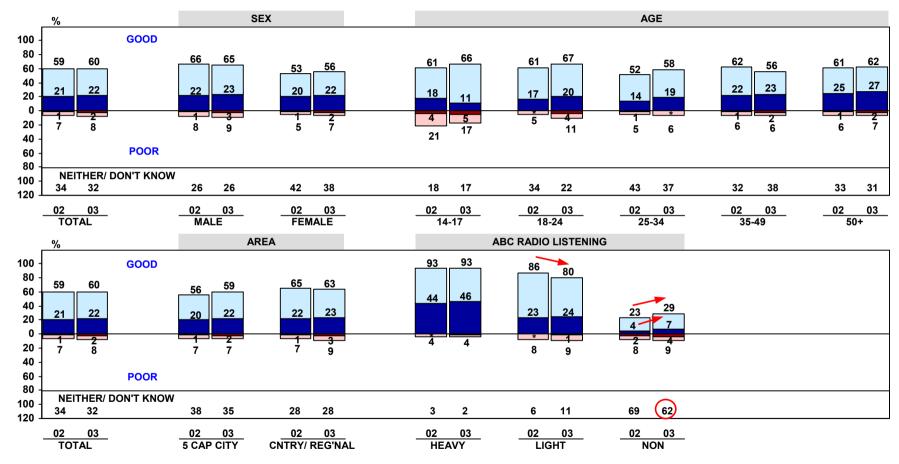
Radio - Quality of programming

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?



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?



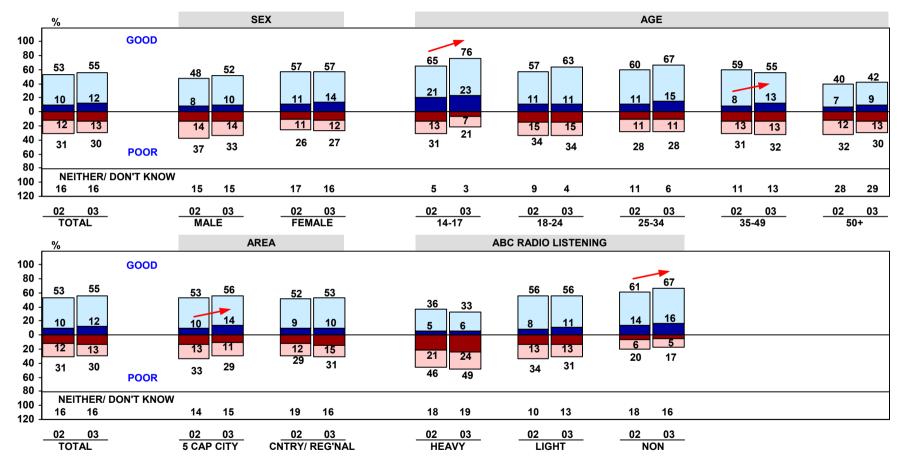
■ VERY GOOD □ QUITE GOOD ■ VERY POOR □ QUITE POOR

* LESS THAN 0.5 PERCENT



Commercial Radio - Quality of programming

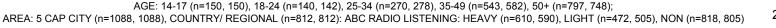
Based on your own experience, or what you may have seen or heard, overall do you personally think the quality of programming on Commercial radio stations is good or poor?



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

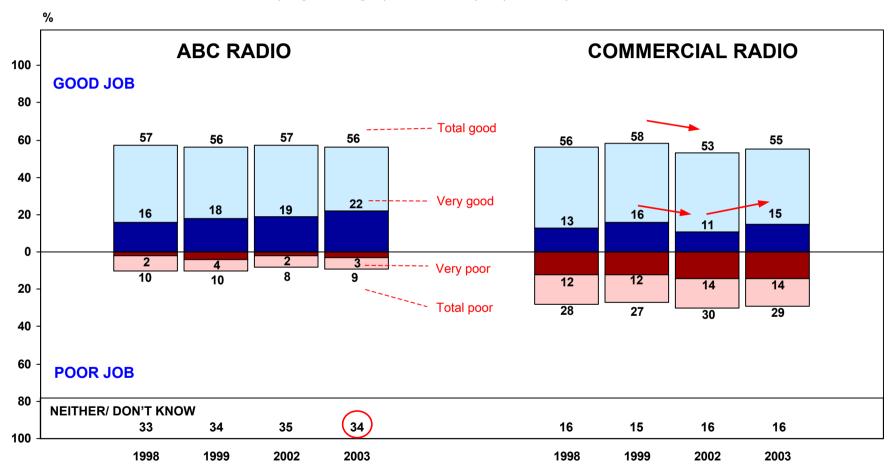
BASE: AGED 14+ NATIONALLY: TOTAL (n=1900, 1900); SEX: MALE (n=950, 950), FEMALE (n=950, 950);

* LESS THAN 0.5 PERCENT



Radio - Number of shows you like to listen to

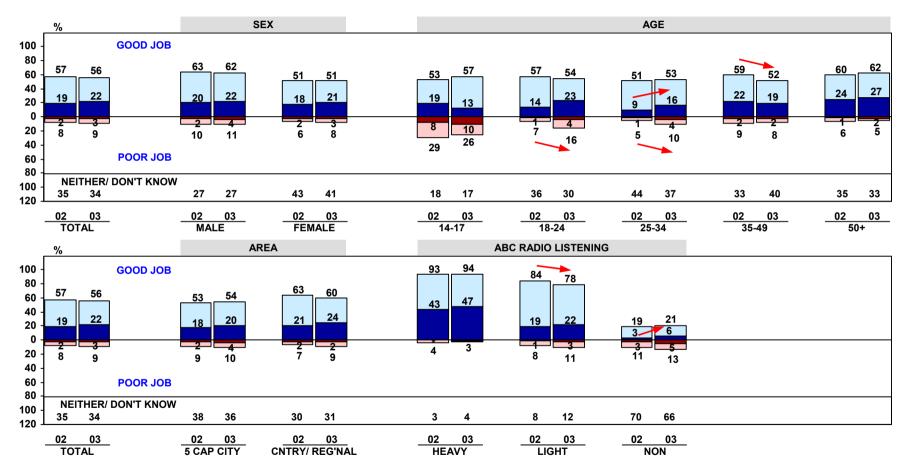
And overall would you say that ... (TYPE) does a good job, or a poor job, in terms of the amount of programming it provides that you personally like to listen to?



■ VERY GOOD JOB □ QUITE GOOD JOB ■ VERY POOR JOB □ QUITE POOR JOB

ABC Radio - Number of shows you 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?



■ VERY GOOD JOB □ QUITE GOOD JOB ■ VERY POOR JOB □ QUITE POOR JOB

* LESS THAN 0.5 PERCENT FIGURE 13

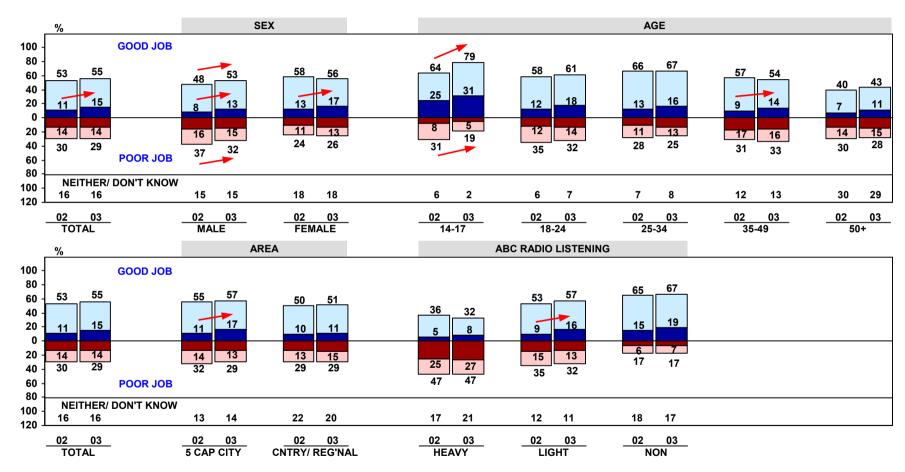
Statistically

significant

change

Commercial Radio - Number of shows you 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?







4.4 Online

4.4.1 Usage of the Internet

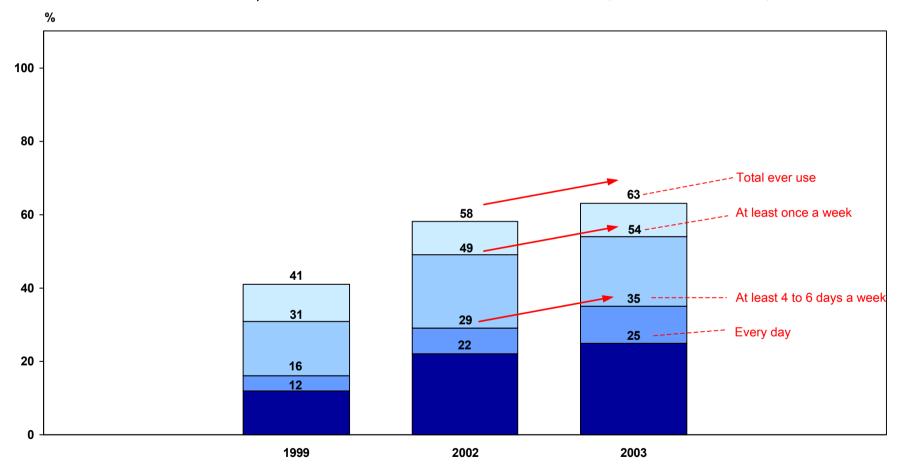
- Usage of the internet continues to trend upwards, with 63 percent of Australians claiming to ever use it for purposes other than e-mail - up from 58 percent in 2002. A guarter of Australians aged 14 years and over now claim to use the internet for this purpose every day (Figure 15).
- Internet usage continues to be most prevalent among those aged under 50, and in metro rather than country areas. Over the past 12 months, usage appears to have grown more quickly among females than males.

4.4.2 Usage of the ABC Website

- At face value, the proportion of Australians who claim to ever use the ABC website has increased compared with last year - though the overall change is not large enough to be statistically significant (20 percent in 2003 vs 18 percent in 2002) -Figure 16.
- Usage continues to be highest among people under 50, particularly those under 35 (Figure 17).
- Compared with 2002, there has been an increase in the proportion of females and those aged 18-24 who claim to use the ABC website.
- Nine-in-ten of the site's users believe it provides good quality information this is stable compared with 2002 (Figure 18). However, the proportion who say the quality of the information is "very good" has increased - up from 32 to 38 percent.

Frequency use Internet

Now thinking about the Internet generally. Apart from using it for e-mail, how often, if at all, would you personally use the Internet either for business or personal reasons? Would it be at least once a week, less than once a week, or never?



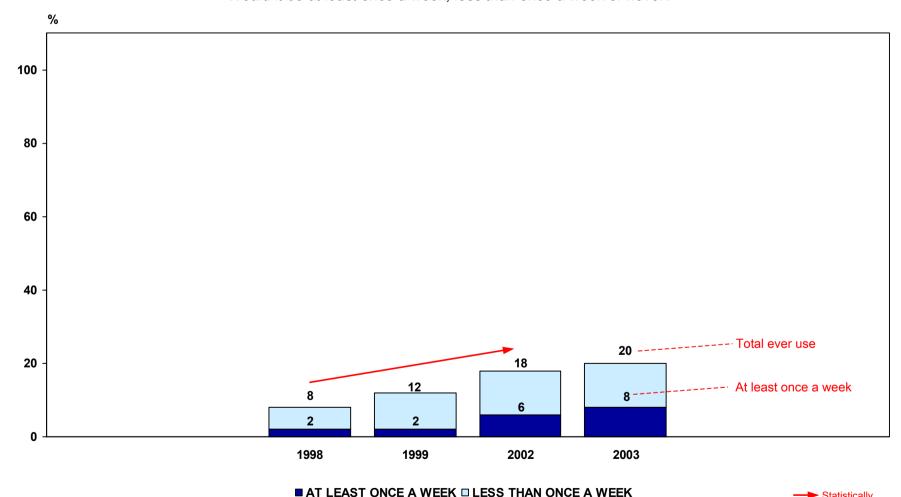
■ EVERYDAY ■ 4-6 DAYS A WEEK ■ 1-3 DAYS A WEEK ■ LESS THAN ONCE A WEEK



Frequency use ABC website

Now thinking about the ABC website. About how often would you personally visit the ABC website?

Would it be at least once a week, less than once a week or never?



Frequency use ABC website

Now thinking about the ABC website. About how often would you personally visit the ABC website? Would it be at least once a week, less than once a week or never?

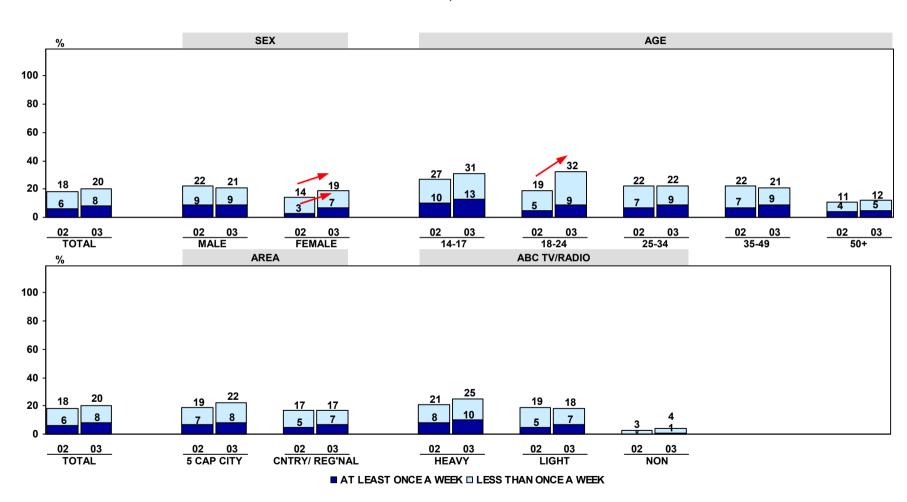


FIGURE 17

* LESS THAN 0.5 PERCENT BASE: AGED 14+ NATIONALLY: TOTAL (n=1900, 1900); SEX: MALE (n=950, 950), FEMALE (n=950, 950);



Statistically

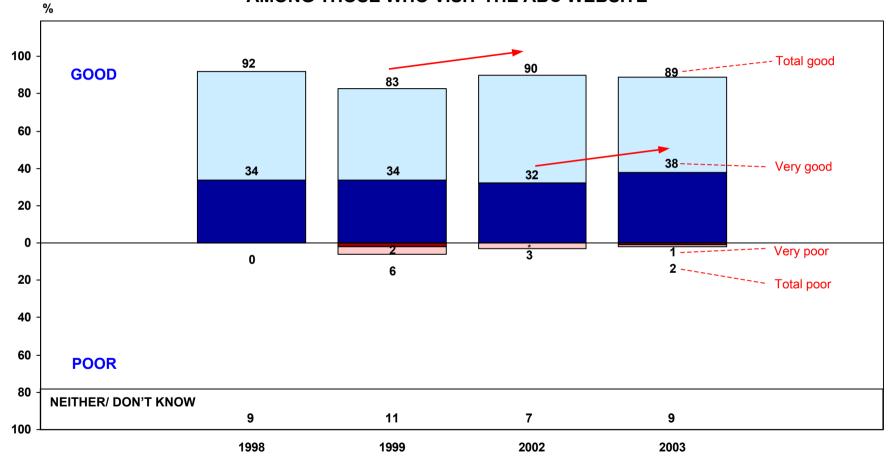
significant

change

ABC website - quality of information

Do you personally think the quality of information on the ABC website is good or poor?





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

* LESS THAN 0.5 PERCENT

4.4 Online (continued)

4.4.3 Usage of Websites for News and Current Affairs

- One in five internet users claim to use the ABC website either regularly or from time to time *specifically for news and current affairs information*. This compares with 45 percent who claim to use ninemsn, and around 10 to 15 percent who claim to use each of The Sydney Morning Herald, The Age and The Australian newspaper websites, as well as News Interactive (Figure 19).
- Compared to 2002, there has been a small but statistically significant increase in the proportion using ninemsn or The Age site for news and current affairs. There has also been an increase in the number nominating the News Interactive website, however this is probably due in part to a change in the description read to respondents this year the reference also mentioned the website address "news.com.au".
- Once again the results show metropolitan newspaper sites perform well in the newspaper's state of origin for example the Sydney Morning Herald in NSW and The Age in Victoria. So although the ABC site is second only to ninemsn *nationally*, this is not necessarily true within individual states (Figure 20).

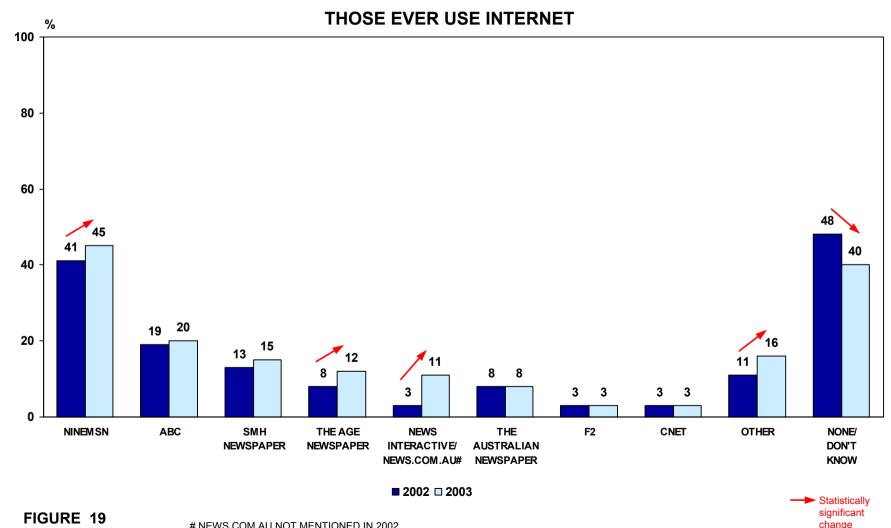
4.4.4 Drivers to site preference / usage

- Those using two or more websites were asked which site they thought was the best for news and current affairs, and why. Those who used only one site were asked why they use that particular site rather than another site. This information was used to quantify respondents' "preferred" websites, and the drivers behind these choices.
- Three in ten Internet users nationally said their "preferred" site was ninemsn, while less than one in ten mentioned each of the following the ABC website, The Sydney Morning Herald, The Age or The Australian newspaper sites or the News Interactive website (Figure 21).
- The reasons given for using one particular site, **or** for rating a given site as "the best" are shown in Figure 22. This shows that ninemsn being a homepage (either through personal choice or default) continues to be a key driver behind its prevalent usage, whereas impartiality, relevance of content and to a lesser extent timeliness and its Australian/ local perspective are more likely to be reasons for using the ABC site. Compared with 2002, there has been a statistically significant decrease in the number nominating depth / comprehensiveness as reasons for preferring the ABC site.

5

Websites used to find out about news/ current affairs

Thinking about websites that provide news and current affairs information. Which of the following websites, if any, do you personally use, either regularly or from time to time, specifically to find out about news and current affairs?



Websites used to find out about news/ current affairs

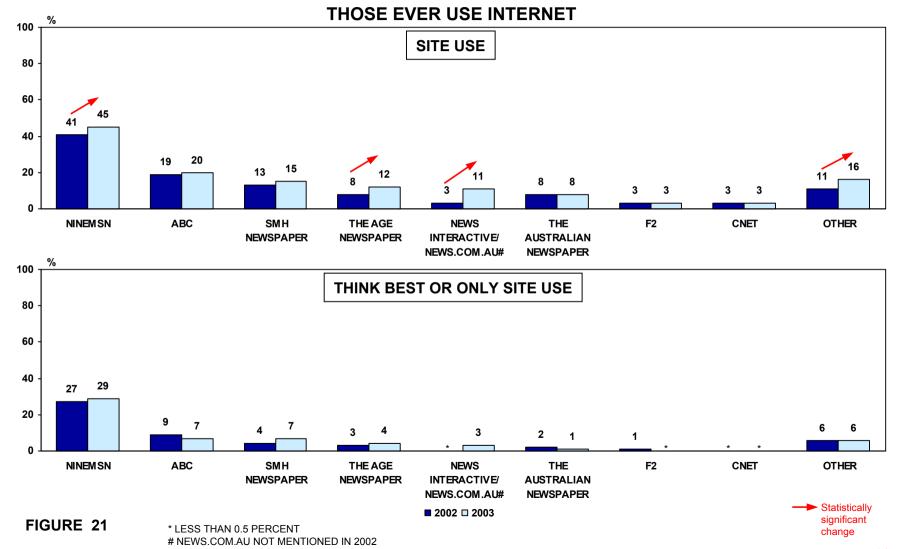
Thinking about websites that provide news and current affairs information. Which of the following websites, if any, do you personally use, either regularly or from time to time, specifically to find out about news and current affairs?

THOSE EVER USE INTERNET

	TOTAL	<u>NSW</u>	<u>VIC</u>	<u>QLD</u>	<u>SA</u>	<u>WA</u>
N=	(1228)	(280)	(222)	(272)	(200)	(195)
	%	%	%	%	%	%
NINEMSN	45	48	44	46	35	46
ABC	20	20	23	17	15	20
SMH NEWSPAPER	15	30	8	6	4	3
THE AGE NEWSPAPER	12	5	32	5	4	3
NEWS INTERACTIVE / NEWS.COM.AU#	11	14	9	10	9	10
THE AUSTRALIAN NEWSPAPER	8	10	6	6	8	11
F2	3	4	4	2	2	2
CNET	3	3	3	4	4	2
OTHER	16	16	18	12	16	16

Websites used & "preferred" for news/ current affairs

Thinking about websites that provide news and current affairs information. Which of the following websites, if any, do you personally use, either regularly or from time to time, specifically to find out about news and current affairs?
 And which one of these would you personally say is the best website for news and current affairs?



Reason website is best/use website for news/current affairs

- For what particular reasons do you think ... is the best website for news and current affairs?

- For what particular reasons do you use ... for news and current affairs rather than any of those other sites?

	ABC		NINE	MSN	OTHER WEBSITE		
	2002	2003	2002	2003	2002	2003	
N=	(100)	(105)	(271)	(356)	(174)	(221)	
	%	%	%	%	%	%	
TOTAL GAVE REASON	96	99	94	96	95	92	
TOTAL UNBIASED / FACTUAL / GOOD QUALITY	33	24	1	-	13	13	
UNBIASED/ IMPARTIAL / BALANCED REPORT	22	20	-	-	5	6	
FACTUAL	7	3	*	-	3	1	
GOOD QUALITY JOURNALISM/ WELL WRITTEN ARTICLES	7	3	1	-	8	6	
TOTAL PHYSICAL CHARACTERISTICS	na	33	na	63	na	31	
EASIER TO NAVIGATE / USE / GOOD LAYOUT	15	19	14	18	28	21	
EASY TO ACCESS/ CONVENIENT	4	10	16	11	4	6	
HOMEPAGE / AUTOMATIC LINK / LINK TO EMAIL	1	5	38	40	5	3	
LINKS TO OTHER WEBSITES	-	1	-	6	-	5	
CHAT ROOMS	-	-	-	2	-	-	
TOTAL RELEVANT TO ME / SPECIFIC CONTENT OF INTEREST	30	31	17	15	40	36	
TOTAL RELEVANT TO ME	13	13	14	6 ₩	22	17	
HAS EVERYTHING I NEED	8	9	8	3	10	6	
RELEVANT NEWS / NEWS I WANT	4	4	6	3	13	11	
AUSTRALIAN/ LOCAL PERSPECTIVE / NEWS	5	12	1	2	3	6	
COVERS BOTH LOCAL AND INTERNATIONAL NEWS	3	4	2	1	6	4	
INTERNATIONAL / WORLD NEWS / COVERAGE	4	2	1	2	13	5	
BROAD RANGE OF ISSUES / NEWS COVERED	11	18	12	11	15	15	
UPDATED REGULARLY / MOST UP TO DATE	15	13	2	5	6	21	
READ THE NEWSPAPER / WATCH THE PROGRAM	5	11	3	5	8	2 '	
DEPTH OF KNOWLEDGE / COMPREHENSIVE	17	7 👆	3	2	13	11	
GOOD INFORMATION	-	2	-	1	-	2	
SPORT INFORMATION/ SCORES	-	1	-	4	_	4	
HAVE ALWAYS USED IT / ONLY ONE I KNOW	4	1	15	11	7	5	
SAW IT ADVERTISED WELL KNOWN/ WIDELY KNOWN	5	-	5	2 1	Î	-	
GOOD TO LOOK UP FOR SCHOOL / UNI WORK INFORMATION	-	-	-	2	-	2	
OTHER	3	- 11	- 1	5	- 1	9	
DON'T KNOW WHY BEST	4	1	6	4	5	8	
Sold fillion will be of	7	,		•	J	J	





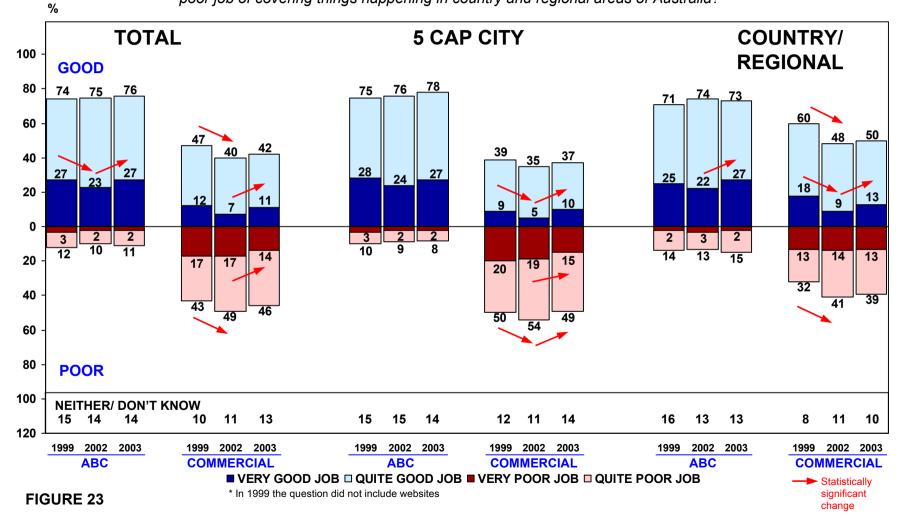
4.5 Coverage of country news and information

- Many more Australians (76 percent) believe the ABC does a good job covering country / regional issues than believe this about commercial media (42 percent) - and this continues to be apparent both among people in capital cities and people in country / regional areas (Figure 23).
- In 2003, there was a small increase in the proportion who rate the ABC as very good on covering country and regional information. [So although 2003 saw a small decrease in country people believing the ABC provides a valuable service to the community, this change is not reflected in perceptions about the ABC's coverage of country / regional issues].
- In 2002, perceptions about commercial media deteriorated noticeably concerning country / regional coverage, though they have improved very slightly again in 2003.

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?

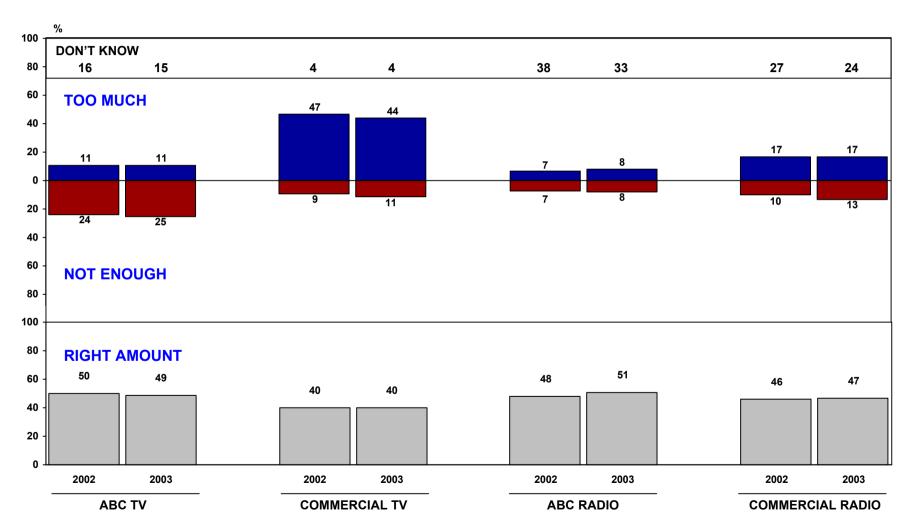


4.6 Coverage of Sport

- Community beliefs about the amount of sport coverage provided by the ABC and commercial media remain unchanged compared with 2002.
- About half believe ABC Television provides the right amount of sports coverage while 25 percent think there is not enough sport on ABC media, and 11 percent that there is too much. For commercial media, although 40 percent believe the volume of sport is about right, a similar number think there is too much sports coverage. Very few, 11 percent, think there should be more (Figure 24).
- Although people have different perceptions about ABC Television and commercial television concerning sport, their beliefs about ABC and commercial radio are very similar. Neither ABC Radio nor commercial radio are strongly associated with having too much or too little sport.
- Overall then, as noted in 2002, the findings indicate sport is not a "problem" for the ABC, one way or the other. However this does not preclude the possibility that the right sporting event, at the right time, could be regarded favourably by the community, and attract audience.

Right amount of sports coverage on TV / Radio

Thinking about sports coverage on television / radio. In your opinion, does...(TYPE) provide too much coverage, not enough coverage or about the right amount of coverage of sport?



4.7 Other specific charter obligations

In each wave of the Appreciation Survey to date, respondents have been asked if they believe the ABC is doing a "good job" or a "poor job" on nine other specific aspects of the ABC charter, viz:

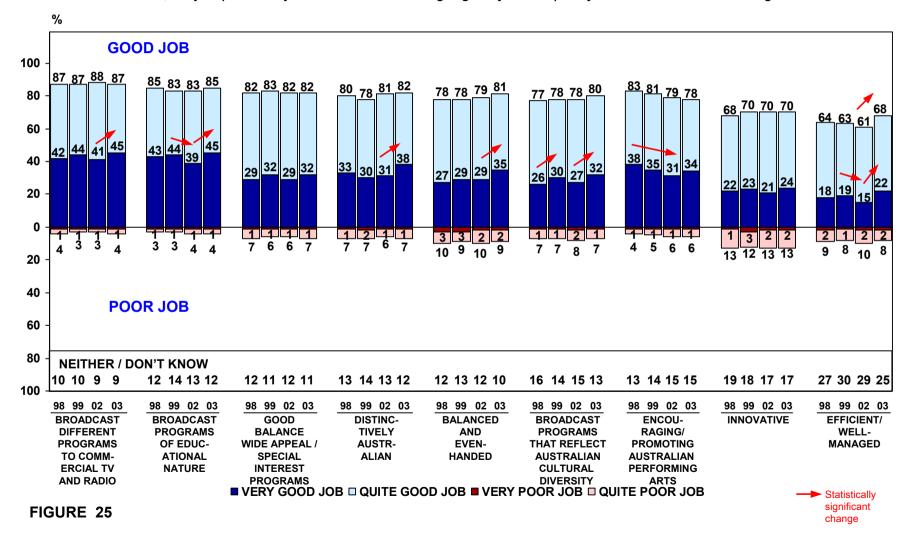
- a) being innovative - that is trying to do new things and different types of programs
- being balanced and even-handed when reporting news and current affairs b)
- encouraging and promoting Australian performing arts such as music and drama c)
- d) broadcasting programs of an educational nature
- being distinctively Australian and contributing to Australia's national identity
- 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
- broadcasting programs that reflect the cultural diversity of the Australian community i)
- The majority of Australians continue to believe the ABC is doing "a good job" in fulfilling each area (Figure 25). The dimensions on which the community has the mostly strongly formed, positive perceptions are in relation to:
 - broadcasting programs that are different from those on commercial television and radio; and,
 - broadcasting programs of an educational nature.
- Overall, the results are fairly stable, though for several areas the number who feel the ABC is doing a very good job has increased. The largest gains occurred for:
 - being efficient and well managed;
 - being distinctively Australian and contributing to Australia's national identity;
 - being balanced and even-handed when reporting news and current affairs; and,
 - broadcasting programs of an educational nature.
- The total who believe the ABC is doing a good job in relation to being efficient and well managed also increased and is significantly higher than at any other time in the tracking series. There has been no further deterioration in perceptions about the ABC encouraging and promoting Australian performing arts.

4.7 Other specific charter obligations (cont'd)

- From our experience with tracking studies, when brands go through periods of high visibility, it is not unusual for increases to occur on a large number of brand image attributes (not just those attributes targeted by advertising). The increases shown in Figure 25 are reminiscent of this so called "halo" effect.
- At the time of fieldwork for the 2003 Appreciation Survey, there was a good deal of media coverage concerning accusations of bias in the ABC's reporting, and also concerning ABC funding. It is conceivable this visibility has contributed to the results shown in Figure 25.

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?



4.8 News and Current Affairs - being balanced an even handed

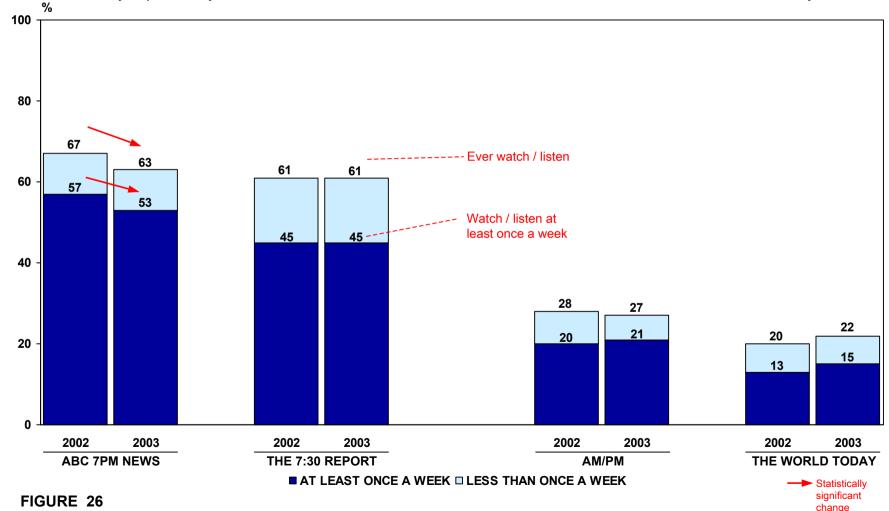
- Perceptions about balance and even-handedness in reporting were explored in more detail among viewers and listeners of the ABC's flagship News and Current Affairs programs:
 - Television: 7pm News, 7.30 Report;
 - Radio: The World Today, AM and PM.
- The proportion who claim to watch or listen to each show was found to be similar to 2002, though fewer claim to watch the ABC 7pm News (Figure 26)¹.
- Consistent with the 2002 findings, the vast majority of viewers / listeners believe each program does a good job of being balanced and even-handed including around four-in-ten who believe they do a *very* good job. So, once again, at this broad level, there is little evidence of any strong sense of perceived bias among users² (Figure 27).

¹ Note that respondent claims on frequency of viewing / listening are not measuring "rating points", which we would expect to be significantly lower than any number shown in Figure 26. The broad-brush frequency of viewing / listening question was asked purely for the purposes of identifying users so that their opinions could be sought on the issue of being balanced and even-handed.

² Nevertheless it is worth noting the term "balanced and even handed" is very broad ranging (and was intended to be) - embracing lack of bias in any area at all. In answering this question, some people may be thinking of politics, others may be thinking of (say) Aboriginal issues, refugee issues, and so on. It is conceivable that a drill-down on any one particular issue may reveal different perceptions.

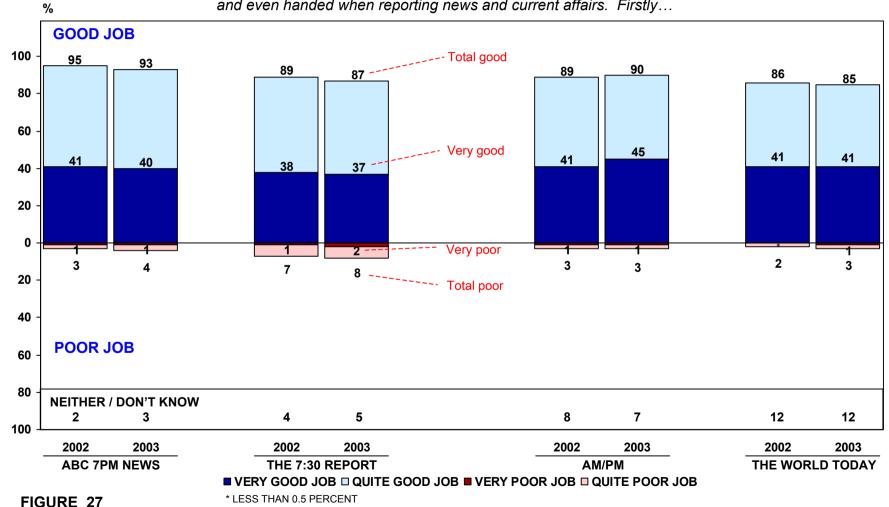
Frequency watch / listen to specific ABC news / current affairs programs

Now about your viewing of some specific ABC Television programs / ABC Radio programs. For each of the following, please tell me if you personally watch them / listen to them at least once a week, less than once a week or never. Firstly...



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...



4.9 News and Current Affairs - content

- The survey explored community perceptions about the *amount of coverage* given by the ABC to specific news and current affairs issues. To identify relevant users, respondents were asked how often, if at all, they personally use ABC television, radio or online as a source of news and current affairs. There were no statistically significant changes in claimed usage in 2003, with 75 percent claiming to use ABC media for news and current affairs at least once a fortnight¹ (Figure 28).
- These users were asked if they felt the ABC gave too much, not enough or about the right amount of coverage to a list of 21 topic areas. Trended data are shown in Figures 29 to 31².
 - a) Consistent with 2002, on nearly all issues, a majority feel the amount of coverage is "about right".
 - b) A number of statistically significant changes occurred in 2003, including:
 - an increase in the proportion believing there is too much coverage of federal and state politics yet an increase in the number who think there is not enough coverage of local politics;
 - a decline in the number believing there is too much coverage of immigration (a reversal of the trend since 1998);
 - an increase in the proportion who think there is the right amount of coverage of sports news;
 - an increase in the proportion who think there is not enough coverage of industrial relations issues, in conjuction with a fall in the proportion who think there is the right amount of coverage.

- 2. *Caveats*: We believe a few points should be considered when reviewing these results:
- a) For some people, a particular type of news may be extremely important to them, and a key reason they value the ABC. They may judge the amount of coverage to be "about right" (or even that there could be more). Another person may not be particularly interested in that type of news, and they express the opinion that "there's too much coverage". However although this opinion is valid and true, it may have no bearing on their usage of the ABC nor how they feel about the ABC overall. Consequently based on the information shown in Figures 29 to 31, it cannot be determined which opinions are critical drivers, and which are simply "opinions".
- b) As issues appear then disappear from the news radar screen, there will always be mixed opinions about the importance and relevance of different issues. In the end, the "news is the news", and the ABC (or any other media organisation) has a role to report the news.



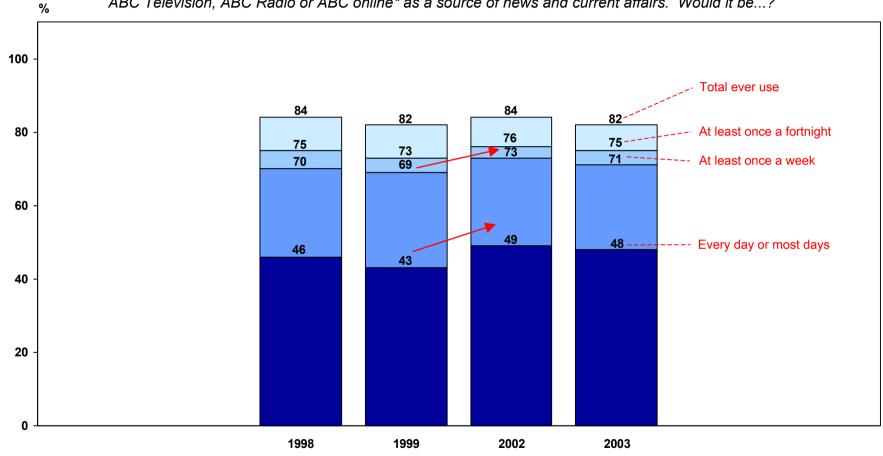
^{1.} Note that respondent claims on frequency of usage are not measuring "rating points", which we would expect to be significantly lower than any number shown in Figure 28. The broad-brush frequency of viewing / listening question was asked purely for the purposes of identifying users so that their opinions could be sought on on the amount of coverage given to various issues. It should also be noted in 1998 and 1999 the survey was conducted in December rather than June, and that the question did *not* include reference to ABC online.

4.9 News and Current Affairs - content (cont'd)

Respondents also had the opportunity to give open-ended feedback about issues they believe should be given more, or less coverage. Overall, responses were very fragmented, with no major issues emerging (Figures 32 and 33).

Frequency use ABC for news / current affairs

Now thinking about sources of news and current affairs, and in particular ABC Television, ABC Radio stations and ABC online. About how often, if at all, would you personally use ABC Television, ABC Radio or ABC online* as a source of news and current affairs. Would it be...?



■ EVERYDAY OR MOST DAYS ■ 1-2 DAYS A WEEK ■ ONCE A FORTNIGHT □ LESS THAN ONCE A FORTNIGHT

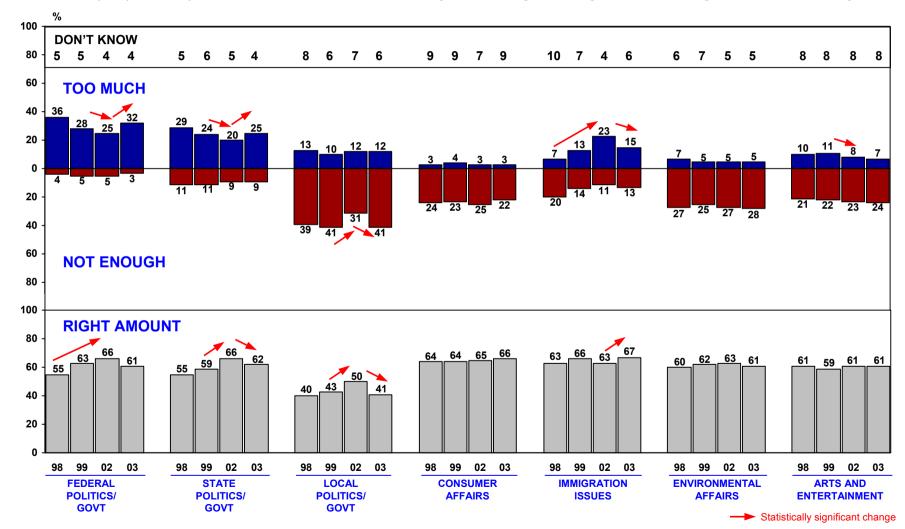
* In 1998 & 1999 the question did not include ABC online

FIGURE 28

significant change

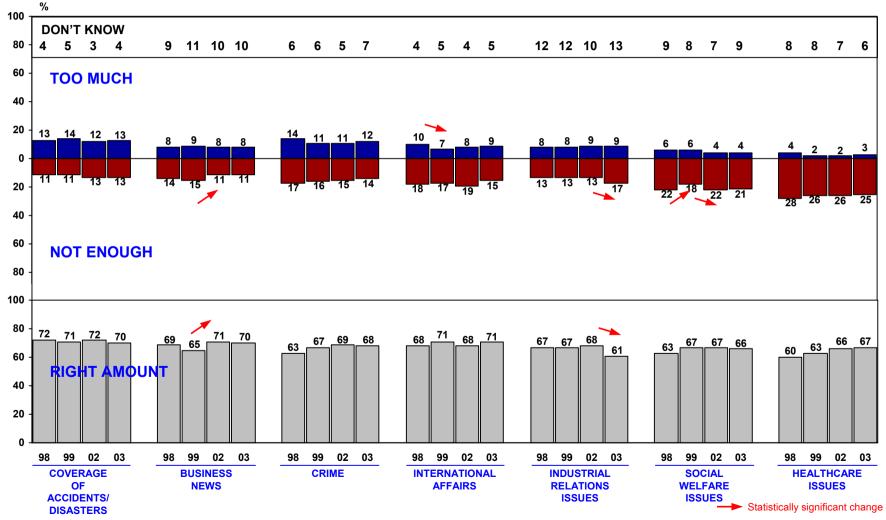
Amount of coverage on ABC

Now we'd like your opinion about the type of news and current affairs covered by the ABC. For each of the following please tell me if you personally think the ABC has too much coverage, not enough coverage or about the right amount of coverage.



Amount of coverage on ABC

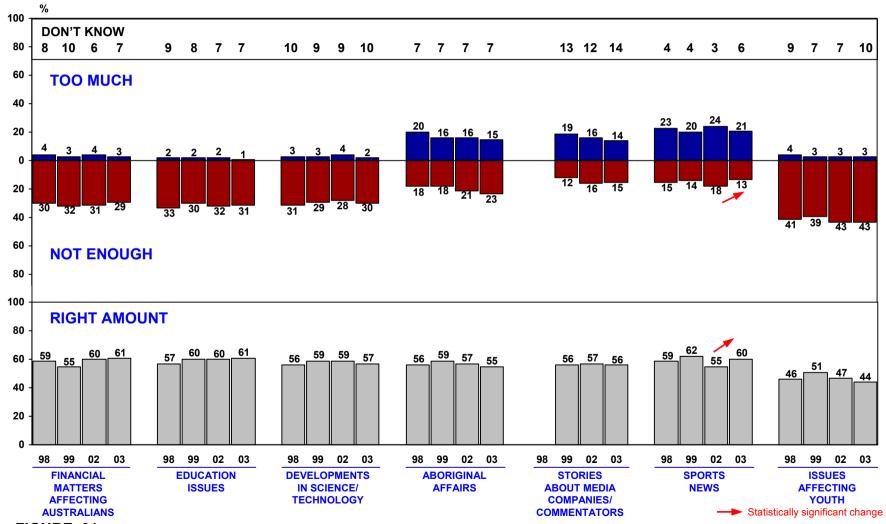
Now we'd like your opinion about the type of news and current affairs covered by the ABC. For each of the following please tell me if you personally think the ABC has too much coverage, not enough coverage or about the right amount of coverage.





Amount of coverage on ABC

Now we'd like your opinion about the type of news and current affairs covered by the ABC. For each of the following please tell me if you personally think the ABC has too much coverage, not enough coverage or about the right amount of coverage.



News items ABC devoting too much coverage to

Apart from the issues I've just mentioned, are there any other areas, or specific news items, you believe the ABC is devoting too much coverage to at the moment? Which others?

	<u>1998</u>	<u>1999</u>	<u>2002</u>	<u>2003</u>
N=	(992)	(1400)	(1494)	(1483)
	%	%	%	%
TOTAL POLITICS	3	1	2	5
POLITICS / POLITICAL ISSUES	2	1	1	3
GOVERNOR GENERAL / PETER HOLLINGWORTH	-	-	-	1
CREAN/ BEAZLEY LEADERSHIP CHALLENGE	-	-	-	1
PARLIAMENT	-	-	-	0.4
LABOR PARTY	0.2	0	0.1	0.2
FEDERAL POLITICS	1	0.1	1	0.1
OTHER	0.1	0.4	-	1
TOTAL INTERNATIONAL AFFAIRS	3	2	2	4
TOTAL OVERSEAS PROBLEMS/TERRORISM/IRAQ	-	-	-	3
OVERSEAS PROBLEMS / WARS / VIOLENCE	1	0.2	1	2
IRAQ WAR	-	-	-	1
OVERSEAS/INTERNATIONAL NEWS / AFFAIRS	1	1	1	1
AMERICAN/ INTERNATIONAL POLITICS	0.4	0.1	0.2	0.3
AMERICA / AMERICAN NEWS	0.3	0.1	0.2	0.2
OTHER	0.4	0.2	-	0.2
TOTAL SPORT	2	2	1	1
CRICKET	0.4	0.1	0	0.2
SPORT NFI	1	1	0.3	1
OTHER	0.3	1	0.3	0.4

		<u>1998</u>	<u>1999</u>	<u>2002</u>	<u>2003</u>
	N=	(992)	(1400)	(1494)	(1483)
		%	%	%	%
TOTAL SOCIAL ISSUES		2	1	3	1
ABORIGINAL ISSUES		0.3	0.3	0.2	0.4
IMMIGRATION/ REFUGEES / BOAT PEOPLE		-	0.3	2	0.1
YOUTH AFFAIRS/ YOUTH UNEMPLOYEMENT		-	-	-	0.1
GAY RIGHTS / ISSUES / LESBIAN ISSUES		1	0.1	0.1	0.1
OTHER		0.3	0	0.1	0.2
MUSIC / ENTERTAINMENT		-	-	-	0.3
BAD/ NEGATIVE NEWS / DISASTERS / TRAGEDIES	S	1	0.1	0.2	0.2
ARTS / CLASSICAL OPERA		1	0.1	0.2	0.2
RELIGIOUS ISSUES / HYMNS OF PRAISE		-	-	0.1	0.2
FINANCE / BUSINESS ECONOMY RELATED		0.3	0.3	0.2	0.1
LOCAL RURAL RELATED		0.1	-	0.1	0.1
SCI / TECH / AUST'NS IN SCIENCE/MEDICAL DEV		-	-	-	0.1
COMEDY HUMOUR / ENGLISH SITCOMS		0.2	-	0.1	0.1
OTHER		2	2	1	1
NONE/ DON'T KNOW		88	93	91	88

News items ABC should provide more coverage of

And apart from the issues I mentioned before, are there any other areas, or specific news items, you believe the ABC should be providing more coverage of? Which others?

	<u>1998</u>	<u>1999</u>	2002	2003		<u>1998</u>	<u>1999</u>	2002	2003
N=	(992)	(1400)	(1494)	(1483)	TOTAL SPORT	3	3	3	4
	%	%	%	%	CRICKET	1	0.3	0.2	0.3
TOTAL SOCIAL ISSUES	5	5	5	6	WOMENS SPORT	0.3	0.3	0.4	0.2
HEALTH	0.4	1	1	1	SPORT NFI	1	1	2	1
SOCIAL/ FAMILY/ WOMENS ISSUES	1	1	1	1	OTHER	2	2	1	3
YOUTH AFFAIRS/ YOUTH UNEMPLOYMENT	1	1	1	1	MUSIC/ ENTERTAINMENT	1	1	1	1
EDUCATION	1	1	1	1	ENVIRO/ CONSERV/ WATER RESOURCE/ SALINITY	1	1	2	1
IMMIGRATION/ REFUGEES/ BOAT PEOPLE	-	-	0.1	1	WEATHER/ STORM WARNINGS	-	-	-	1
AFFAIRS OF RETIRED/ OLD PEOPLE	1	1	0.2	0.3	GOOD NEWS/ PEOPLE DOING GOOD DEEDS	1	2	1	1
ABORIGINAL ISSUES	0.3	0.2	0.2	0.3	SCI/ TECH/ AUST'NS IN SCIENCE/MEDICAL DEV	1	1	1	1
CRIME	0.3	1	0.2	0.3	ARTS/ CLASSICAL/ OPERA	1	1	1	1
DRUG ISSUES	1	0.3	0	0.3	AUSTRALIAN CONTENT	1	1	1	1
GAY RIGHTS/ ISSUES/ LESBIAN ISSUES	-	0.3	0.2	0.2	COMEDY/ HUMOUR/ ENGLISH SITCOMS	1	0.2	0.2	1
OTHER	1	1	0.3	2	MOVIES	1	0.3	0.1	1
TOTAL LOCAL/ RURAL	5	5	5	5	TOTAL FINANCE/ BUSINESS/ ECONOMY	1	1	1	1
LOCAL ISSUES/ NEWS	3	3	3	3	ECONOMY/ WORLD ECONOMIES	0.2	0.3	0.4	0.1
RURAL/ COUNTRY ISSUES/NEWS	2	2	3	2	FINANCE	0.2	1	0.4	0.1
DROUGHT	-	-	-	1	OTHER	1	0.2	0.2	0.3
AGRICULTURE	-	-	-	0.2	TOTAL POLITICS	2	2	1	0.4
TOTAL INTERNATIONAL AFFAIRS	2	3	2	4	POLITICS/ POLITICAL ISSUES	0.4	1	0.3	0.2
OVERSEAS/ INT'L NEWS/ AFFAIRS	2	3	2	2	FEDERAL POLITICS	-	0.2	0.3	0.1
TOTAL O'SEAS PRB/ TERRORISM/ IRAQ	-	-	-	2	PARLIAMENT	-	-	-	0.1
O'SEAS PRBLMS/WARS/ VIOLENCE	0.2	0.4	0.4	1	OTHER	0.3	1	0.1	0.1
IRAQ WAR	-	-	-	1	RELIGIOUS ISSUES/ HYMNS OF PRAISE	0.4	0.2	1	0.2
AMERICAN/ INTERNATIONAL POLITICS	0.1	0.3	0.1	0.1	OTHER	3	3	1	5
OTHER	-	1	-	1	NONE/ DON'T KNOW	77	78	78	77

5. Questionnaire

NEWSPOLL TERMS AND CONDITIONS

A) Code of professional behaviour

NEWSPOLL adheres to the Code of Professional Behaviour of the Market Research Society of Australia. This Code includes the following key requirements:

1. Confidentiality

Clients' identities will not be revealed to respondents nor to any third party without the client's consent or unless NEWSPOLL becomes legally obliged to do so. Respondents' identities will not be revealed to clients without respondents' consent and only in cases where the information is to be used for research purposes and the intended use has been explained to respondents.

2. Ownership of information

Results to a research study commissioned by a client become the property of the client. Results to syndicated studies remain the property of NEWSPOLL.

All research proposals, research designs, questionnaires and processing techniques, including systems of weighting, remain the property of NEWSPOLL. All computer table reports provided by NEWSPOLL identify the variables used in the weighting process. Further details, if required, are available at an additional cost. Photocopies of individual questionnaires or a copy of the database, excluding respondents' identities, may be made available to a client at the client's expense.

3. Publication of results

Clients choosing to release the findings of a NEWSPOLL survey must ensure that the results are represented in an objective and non misleading fashion.

NEWSPOLL advises that at all times questions must be objective and not intentionally misleading or attempting to elicit a desired response. NEWSPOLL must be consulted and agree in advance on the form and content of any intended release. NEWSPOLL must be provided with a copy of the proposed release and given 48 hours for its review. Up to two executive hours will be made available for this review process. Additional reviewing time, if required, will be charged at an hourly rate. NEWSPOLL is obliged to take action to correct any misleading statements about the research or its findings. The NEWSPOLL name may be used only in cases where these conditions have been satisfied.

B) Conditions of agreement between NEWSPOLL and clients

1. Reporting

Standard report format refers to two copies of an A4 sized computer table report consisting of analysis of each client question by two standard panels of discriminators. Extra analysis and optional reporting formats are available at additional cost and may require additional reporting time.

2. Confirmation of costs

Costs for a study can be confirmed only after agreement on questionnaire outline or on sighting a draft client questionnaire. Changes to agreed research specifications and/or questionnaire will result in a cost revision. Costs are quoted in current year's rates and apply for the January - December period.

3. Omnibus bookings and approvals

Space on NEWSPOLL's omnibuses is strictly limited to ensure high quality response. Early bookings, at least a week prior, are recommended and clients are advised to finalise and approve questionnaires as early as possible. In the event that a questionnaire is not approved by 11:00 am Thursday prior to fieldwork for the Adult Omnibus or by 12:00 midday Friday prior to fieldwork for the Youth Omnibus, a 15 percent late surcharge will apply (minimum of \$370+gst). Bookings may be accommodated after these deadlines but are subject to space availability and to a minimum 15 percent surcharge.

4. Cancellation charges

NEWSPOLL reserves the right to charge the full quoted study cost where a confirmed booking is made and the study is subsequently cancelled or postponed within 72 hours prior to the commencement of fieldwork. Studies cancelled in advance of 72 hours are subject to a 10 percent charge if questionnaire development has begun.

For any study cancelled or postponed after fieldwork has begun NEWSPOLL reserves the right to charge the full quoted study cost.

5. Invoicing and payment terms

NEWSPOLL's standard terms of payment are:

- omnibus studies are invoiced in full at the time of provision of results or for multi-round studies 50 percent will be invoiced at the commencement of the study and 50 percent on provision of results.
- ad hoc studies are invoiced 50 percent upon commissioning and 50 percent upon provision of results.

Invoices unpaid after 30 days will attract a late payment surcharge of up to \$1,000 per month. NEWSPOLL reserves the right to delay the commencement of any study if there are overdue invoices from previous studies. Repeated late payment of invoices will result in the need for payment in full prior to the commencement of future studies.

