

Community Radio Listener Research

February 2021

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Introduction

In February 2020, the Department for Digital, Culture, Media & Sport announced the scope of the **Digital Radio and Audio Review**. The Review will examine the issues facing radio in the next decade and is part of a government commitment ‘*to ensure a sustainable, vibrant radio and audio sector for the UK in the long term*’.

Community Radio is recognised as playing an important role in providing hundreds of communities throughout the UK with local information, entertainment and a forum for debate. However, it is a sector which historically has been under-researched. This study seeks, in part, to address this shortfall and so help inform Community Radio’s input into the Review. It is also hoped this research will act as a platform to help shape future research projects into the sector.

The objective of this study was ***to provide insight into community radio audiences: specifically, why they listen to community radio.***

Complementing this study is a separate workstream. This uses RAJAR, the body in charge of measuring radio audiences, to derive UK audience estimates for Community Radio and its demographic profile.

The project was managed by Rupert Steele (Radiocentre) and this report written by Rupert with John Carroll (GfK). Special thanks are accorded to Bill Best and Janey Gordon at the Community Media Association (CMA) for their extensive support with this project.

Survey Methodology

The survey took the form of an online questionnaire. The CMA publicised the survey’s existence to community radio stations via email and social media. Stations were encouraged to invite their listeners to participate in the research. Note, therefore, that a) respondents self-selected to participate b) respondents originate from only those stations which elected to participate in the research c) the research was conducted online. These factors mean *the results from this research should not be relied upon to be representative of the UK community radio audience.*

Fieldwork took place between 5th February 2021 and 24th February 2021. To stimulate response, an incentive comprising a prize draw for the chance to win one of twenty £50 Amazon vouchers was employed.

The survey was completed by 1,316 listeners to 153 community radio stations (see Appendix). For this report, respondents are categorised into three mutually exclusive groups:

No. of respondents	
1. Those who are directly involved in some way with their community station e.g. as a volunteer	308
2. Those who know someone involved with the community station they listen to, but who are not themselves involved with the station	387
3. Listeners to community radio who are neither involved with the station they listen to nor know someone involved with the station	621
TOTAL	1,316

The focus of this report is on the Listener group, listed third in the table above, although results from the two other groups are included in parts of this report. All results are unweighted.

Definition

For the purposes of this report, a community radio service is defined as:

- Licensed community radio services (including those not on air but which have been granted an FM licence award).
- Internet stations that (i) purport to be community stations and (ii) have evidence of being a Community Interest Company or equivalent (i.e. they meet the test of being constituted as a non-for profit company).
- Are not a hospital or college radio station.

Executive Summary

In February 2021, research was undertaken to help better understand the relationship that listeners have with their community radio stations. An online survey was conducted amongst those listeners who responded having seen or heard the research publicised via the CMA or the community radio stations themselves. Listeners to over 150 community radio stations across all four countries of the UK participated. The survey was not designed to be representative of the UK population or of all community radio listeners. Specifically, the objective was to provide insights into the value and needs being fulfilled by community radio for its audience.

The survey results underline the deep connection that listeners have with their community station. Indeed, many said they would be disappointed and some devastated if their community station were no longer on air. When asked what the survey participants valued most about their community station, the most prominent attributes were:

- Highly localised news, traffic and weather updates
- Diversity of music
- Relatable and personable presenters
- Providing a community service and connection to the local area

Having the ability to hear very local news is a valued attribute of community radio, especially in areas where there is no other local station, or if nearby stations cover wider areas. In some places, the absence of a local newspaper means community radio may be the only source of regular local news updates.

Music plays an important role for the listeners and the type of the music played by community stations is regarded by many as an extremely influential reason for listening. The specific music genre played is important and some listeners relish the varied and unpredictable nature of the music selection. Another aspect of community radio which listeners appreciate is that it showcases local musical talent.

The presenters are considered engaging, likeable, relatable and authentic. Such is the connection between listener and presenter, many community radio listeners consider presenters as friends or part of the family. They also note that those who work in community radio are volunteers.

The sheer localness of community radio output means many listeners feel a strong affinity with their station. Helping engender a feeling of connection is the fact that many community stations encourage listener participation. For many, it is a way in which to hear about issues and activities in the area. Respondents also cited that their community station provided practical and emotional support during the coronavirus pandemic.

More broadly, listeners appreciate their community radio station because it raises awareness of local services, highlights local good causes and supports local events. They also welcomed that community radio carries advertising of local relevance.

Survey Findings

The value of community radio

1. REASONS WHY COMMUNITY RADIO IS VALUED

When asked what respondents valued most about their community station, two aspects were prominent. A fifth (19%) indicated the station attribute they valued most was its provision of **'local news/information'**. A similar proportion (18%) said that for them, the most valued element of community radio was that **'it involves the community'**.

Figure 1: Reasons why community radio is valued

Q. Below is a list of all the things people have said they value about community radio stations. Which of the things on the list do you value about [your community radio station]? Please select all that apply.

Q. which of the things on the list do you MOST value about [your community radio station]?

WHY COMMUNITY RADIO IS VALUED	Community radio listeners (%)		Listeners who know someone at the community radio station they listen to (%)		Those involved with a community radio station (%)	
	Valued (%)	Valued MOST (%)	Valued (%)	Valued MOST (%)	Valued (%)	Valued MOST (%)
It involves the community	63	18	76	22	81	30
Local news/information	59	19	65	11	60	9
Presenters sound like ordinary people	54	9	64	8	71	6
Local voices/personalities	52	10	65	11	66	5
It's independent/not part of big business	43	6	49	7	57	5
It's for people like me	37	9	47	6	50	4
Specialist interest music	33	10	44	7	57	6
Local music artists	29	4	34	3	49	3
Carries advertising for businesses local to me	26	2	32	1	33	0
Programmes not available elsewhere	22	3	25	2	49	3
Specialist interest programming	19	3	30	4	53	3
Carries advertising that is relevant to me	16	*	19	*	23	1
Doesn't carry advertising	6	1	3	0	9	1
Broadcasts non-English programmes	3	*	4	1	9	0
People I know are involved with the station	0	1	100	14	69	3
I am involved with the station	0	0	0	0	100	20
Other, please specify	5	5	4	2	5	1
None of these things	-	1	-	1	-	0

* less than 0.5%

2. WHAT WOULD MISS IF COMMUNITY RADIO DID NOT EXIST

To gain a deeper understanding of the reasons why they value the service they listen to, respondents were asked how they would feel if their community station were no longer on air. They were also asked to explain why they would feel that way. This question elicited a range of responses.

Whilst several reported simply that they would be 'sad', 'disappointed', 'lost' or 'upset', a common word used was 'devasted' and a great many elaborated on how they would feel. Indeed, many responses were several sentences in length, suggesting a strength of feeling.

These responses are categorised into several themes:

- a) News, traffic and weather
- b) Music
- c) Presenters and volunteers
- d) Being 'of the community' and engendering a sense of being connected to the area
- e) Providing a community service
- f) Not-for-profit

[Note that all verbatim responses quoted are exclusively from the community radio *listener group*. Comments from those respondents involved with community radio, or who know someone involved with community radio, are not included.]

a) News, traffic and weather

The highly local nature of the station means that news, traffic, travel and weather updates are appreciated for having greater personal relevance, since they focus on the immediate area.

I want to hear local news... not national stations that just blast out music all day except for the occasional weather [and] traffic forecast for places hundreds of miles away from me.

I'd miss the friendly chat, local news, road reports and information relevant to the area where I live.

I love that it is local and relevant to me (news / traffic info etc).

You get more local information ie. news, weather, road information.

The highly targeted **traffic updates** are valued.

I would feel gutted as we hear all the local information regarding roadworks, problems, accidents etc etc.

The traffic news is very local so useful.

I find the early morning travel news particularly useful. The bulletins are every 20 mins or so which is good at the time of day I am on the road.

I would miss the local traffic updates.

I always know the road situation if I am due to go out and whether to take an umbrella!

They provide local news and traffic updates which for this area is important due the high volume of traffic at rush hour.

The ability to hear **very local news** is also a valued element of community radio, especially in areas where there is no other local station, or if nearby stations cover wider areas.

I would be very unhappy if [my community station] went off air as there would be no local information or news.

National radio stations do not give news which is relevant to me here in [local area].

It's nice to get local news while I'm driving and to feel part of a community.

It would be a shame [if my community no longer existed] as it offers VERY local information and news.

I would lose my only link to local [town] based news and views. Nobody else does it.

Within the [local] area there is NO other way of obtaining local news and information since [other broadcasters] are now almost fully coming from London.

Indeed, in some places, **the absence of a local newspaper means community radio may be the only source of regular local news updates.**

With no local newspapers, [my community station] is the only way I access local news and information - I rely on it for travel, weather and events.

It would be a pity if it closed. There is no other local media that covers local issues. The newspapers are not based in our town anymore.

It's the only way to get local news.

It would be a shame to lose the localness as we no longer have a local newspaper.

[My community station] has become a big part of the communities that it serves, giving local information and news. It has become the only way this information can be found with the demise of local newspapers.

b) Music

As well as satisfying functional needs, community radio is also valued as a source of emotional pleasure.

Music plays a central role in this and the type of the music played by community stations is regarded by a great many as an extremely influential reason for listening. The specific **music genre** played is important to many.

It gives me my weekly fix of soul jazz funk & local information.

[It is a] great source of dance music locally.

I enjoy listening to Indian and Bhangra music.

I love to listen to [my community station] to hear the Scottish music since I cannot be in Scotland.

For specialist (folk) music that I enjoy.

[My community station] has a programme on a Sunday evening... in which the presenter plays music from the thirties, forties etc along with buckets of information about the performers of the time, including their history, past life or what they are doing now if they are still present. [It's] not really my cup of tea, but I get drawn into the show & occasionally he plays a song in which I think "I must get a copy of that!!"

I truly love the variety of Celtic music.

It plays music from the 60's 70's, which I would miss.

My favourite music which is northern soul is not played on any other radio station so I would be gutted if I couldn't listen to [my community station].

Reaching the Caribbean community offering music we can't source anywhere else.

The specialist music is also amazing. I love listening to the presenters sharing their taste of music with the listeners.

No other station exists to promote Scottish music.

It's very good Bollywood music.

The music is great under the umbrella of black music.

For others, it is **the variety or uncommonness of tracks** played that is appreciated.

The different music played daily is a massive change to the previous local fm station that played the same songs all day long.

I love the music variety.

It plays great music across a few different genres.

I value the rarely heard music the station plays, whether old or current.

They play a very diverse range of music.

They play a variety of music from well known as well as little known artists.

There is quite a range of music to suit all tastes.

Music that very few radio stations play.

I would miss the unique programmes and music which is not played elsewhere.

They also play a wonderful selection of music, much of which doesn't get aired quite so much on other radio stations.

The music is unlike anything else, in terms of specialist stuff.

The music certainly is diverse but I mainly listen to soul or funk and get to hear of local gigs.

Plays forgotten music.

It's an interesting station with an eclectic range of music.

[My station] plays an interesting selection of music you can't hear anywhere else.

You hear tracks that are from older LPs rather than tracks that have been hits whilst they bring new music too.

Some listeners relish the **unpredictable nature of music selection**.

It's not formula radio. You never know what songs coming next.

Does not use a fixed playlist like many of the national stations.

Doesn't repeat music like other stations do.

The playlist is always different and you don't tend to hear the same artists or songs being played constantly throughout the day like you tend to on other stations.

The music they play isn't the same old songs you hear every day on local commercial stations.

Many complained that some (non-community) stations' playlists are, in their opinion, predictable or repetitious.

I listened to [a commercial network station] for a short while but turned it off as it was so repetitive.

It would be a shame [if my community station were no longer broadcast] because national stations are too automated, pre-recorded and play the same songs over and over again.

Not happy because other stations tend to play the same thing day in day out.

The problem with [some other radio services] is that it is formula based and boring which is why I don't listen to it normally. The music selection is predictable.

I gave up on [a national station] with over-the-top presenters and the same play lists all the time. You end up hating tracks you liked because you hear them so often.

Far too many... broadcasters are now little more than 'jukeboxes', with formulaic styles dictated by some remote 'suits' in a distant city.

Another aspect of community radio which some listeners appreciate is that it **showcases local musical talent**.

It is an opportunity to showcase local talent which you would not ordinarily get chance to hear.

I would be deeply saddened as there would be fewer outlets for talented local musicians who deserve wider recognition.

It plays a good mix of music. Including local artists.

It promotes local music in an interesting and honestly enthusiastic way.

They also help to deliver music and events in the town such as party in the park, which is local talent and all is provided free.

Not only does it showcase amazing local talent in music I discover so much music I love on [my station].

It promotes local talent.

[My station] involves local people and local talent.

It's a great platform for local artists.

Is very good at showcasing local musicians and other artists.

But most of all wouldn't hear local artists release music.

c) Presenters and volunteers

Community radio presenters are valued for several reasons. Often, they are **applauded for the good job they do** and for **being engaging and likeable**.

All the presenters convey their enthusiasm for doing this for the community. I have never felt that the presenter is just doing it because they have to, but because they want to bring joy & happiness to the listeners.

The presenters are brilliant at their jobs.

The presenters are also ALL fantastic at their jobs.

The presenters are brilliant. They know the local area.

The presenters are a ray of sunshine in an otherwise blandness radio choice you get on other stations.

The presenters are engaging and funny.

[My community station] is unique... with very talented and varied DJ s and presenters.

The djs and presenters are uplifting and local people giving a happy voice at a really needed time.

I would miss the friendly presenters [if my station no longer broadcast].

The presenters care passionately about what they are doing.

Beyond this, however, many mentions were made of the feeling that **presenters feel close and relatable** – down-to-earth and authentic.

The presenters are empathetic to the situation of their listeners.

Music I love & normal down to earth presenters.

The presenters are great and fun and they communicate fantastically with you individually... I would miss them greatly.

The presenters are all locally based and have a real connection to the community.

The presenters are happy and down to earth people who keep us all smiling and laughing. They do a wonderful job.

The presenters are all volunteers and talk about ordinary life.

The presenters are friendly and knowledgeable and are very approachable.

The presenters talk about local things that interest me.

Presenters are normal people and funny.

The presenters are really down to earth.

They also have down-to-earth presenters that we can relate to.

It's local down to earth on your doorstep service.

The presenters are also not fake or patronising like those found on... other mainstream stations.

It's a fantastic radio station with human sounding presenters.

Such is the connection between listener and presenter, many community radio listeners consider **presenters as friends or part of the family.**

The presenters make me feel like family.

The presenters make you feel as though you know them.

It'd be like losing a family member. Although I don't know them personally, they feel like my friends.

The presenters are good company, very down to earth and the craic is good, it's like having friends in the house, u can relate to the conversations and topics they have!

[My community station] feels like family! They are a part of my life whether it is on when I am cleaning, cooking, relaxing or even on my way to work.

I feel that the presenters are my friends.

DJs have become a family through the love of the music they play. I feel valued and loved.

It's like a big family.

That some presenters may not be polished is not perceived to be a problem. Indeed, for some, it adds to the appeal of listening to community radio.

There are at least 2 very knowledgeable djs that have experience in specific music fields, their passion and dedication comes across in their broadcast. Also the fact that they are not polished presenters is part of their charm.

It would be a loss because most mainstream radio stations sound the same, bland, predictable, boring, whereas [my community station] is still exciting, still raw and listener friendly.

It provides a less polished and more honest listening experience. Which I love.

Listeners take account of and admire the fact that those who work at or host community radio are **volunteers.**

Volunteers display a real passion and commitment to engaging in [my community station]. The commitment displayed is commendable.

I admire their independence and volunteerism and the love they have for sharing this music to the WORLD!

It really is a fantastic station and the staff and volunteers do an amazing job.

Its volunteer DJs and staff have got better and better over time.

I like that the radio station is run by volunteers.

I'd miss the station, the genuine people that give their time to make and present the output.

Best station in Wales by far! You wouldn't believe that they are all volunteers!

It is run by volunteers that give up their precious time to entertain local people.

There is an appreciation that community radio can be a **training ground** for those who would like to develop their skills.

I love listening to the students presenting and following their progress over the years. It's also amazing to hear how the volunteer presenters gain confidence and new skills.

It would be a shame to lose it as it's a vital platform for students to learn invaluable skills.

[It] helps people to be aspiring presenters.

I went to [local] academy and even presented a few shows on [my community station] with my best friend, I went on to follow my passion of performing to London, and now have my own podcast. Think about the opportunity a local station gives to so many!

This radio station brings community and supports local talent to be included and gives them a chance to be part of [it].

To hear young people learning a broad range of radio including specialist music is a great training ground for the evolution of radio.

I think this type of radio station is a great place for people to get started in media or in music.

d) Being 'of the community' and engendering a sense of being connected to the area

The sheer localness of community radio means many listeners feel a strong affinity with their station – **a common connection**. Some listeners believe that, although other stations may attempt to try to create a sense of being local, they are unable to achieve the same degree of resonance.

I would feel that there isn't any light being shed on local organisations and communities [if my station stopped broadcasting]. I wouldn't feel a deeper connection and bond to other larger radio stations. The sense of realness would disappear for me.

It would be a great loss [if my community station were no longer on air]. National radio has changed dramatically over the last few years, and become very "socially correct", whereas [my community station] has remained true to its roots, and the connection with the local community is very much valued and appreciated.

Community radio is what it says on the label and that is what I would miss.

The DJs are local, understand the local community and its needs. Not the needs of London. (London life is very different to the rest of the country.)

It's not being broadcast from London it's from [my town]. [My community station] fills the gap that local commercial stations once had until they moved to London. It's our community station.

[My station] offers a lot of community aspects compared to other stations that are networked or national.

It would be a loss to the community as it fills a gap created by the expansion and regionalisation/ nationalisation of other radio services.

It would be a real shame as local radio represents our area. It covers things relevant to [my town]. The broadcasters know the area and you feel they know and appreciate the people. National stations seem to be faceless and do not represent the local people.

[My community station] is a true radio station with the interests of its listeners at the core - not a corporate or government mouthpiece.

In contrast, non-community stations are perceived by some community radio listeners to be impersonal or paying merely lip-service to providing content of relevance to the local area.

All the local radio shows other than this one are networked and not relevant to the local area.

National radio and large commercial stations are impersonal. There is a greater sense of real connection with local radio.

[My community station] has filled the gap nicely where other stations have centralised.

I'd feel disappointed. All the 'local' stations aren't local anymore. They're all owned by big conglomerates with national presenters who say the name of your local radio station pre-recorded every so often.

Helping engender a feeling of connection is the fact that many community stations encourage **listener participation**.

It involves all communities, people are allowed to phone in on quizzes, talks or just to have a song played.

Listeners can be involved by requesting music.

The djs engage with the listeners all the time with local competitions.

They reply to messages and you can ring them!

We love the interaction it has with local people, you can always phone up and talk the DJ's about anything of interest.

Local content and information is important to me, with the ability to regularly interact with presenters and influence content. This becomes more difficult with regional radio, and impossible with national radio.

I moved to [town] from a tiny village and [my community station] helped me feel at home in a big town. I was even more surprised when I actually saw the studio one day when walking to town! I've even popped in.

The presenters involve the local people with the request shows and competitions.

The station runs local events such as quizzes for local people as well as the radio shows. I have made great friends through these activities.

e) Providing a community service

Many listeners value their community station because it is **a way in which to hear about issues and goings-on in the area**.

[My community station] is fully interactive and at the pulse of the community with... interviews with local councillors, politicians and not for profit organisations, charities.

I would feel like we are missing a vital local source of information and something that supports great causes in my area.

I value the information about local businesses, events and community projects, which are difficult to learn about through any other media.

It also has incredible interviews with many important pillars of the community. From grassroots charities to local businesses. This radio station is incredible, it makes me feel even more connected to the city I love.

Many respondents mentioned that their community station had been able to provide **practical and emotional support during the coronavirus pandemic.**

[My community station] have been invaluable during the Covid pandemic listening to the views and thoughts of the listeners.

[My community station] has been very important during Lockdown in keeping spirits up and passing on community news. The presenters have worked from home and the studio to maintain a radio service which has helped families so much.

I would be very disappointed as all the presenters are local and they have been very good at helping with the pandemic as they gave out information about what was happening in the area, what shops were open, how the covid rates affected the area.

It has been so, so important during the pandemic, feels like part of the family and keeps you well informed of both local and national issues.

Being in lockdown has been very hard and lonely so it's good to have something to listen to that I can associate with.

It has kept me sane whilst working from home during lockdown. it updates on local issues and problems.

The djs and listeners make you feel welcome and the music they play and how they interact with their listeners lifts my spirits and makes my bad thoughts disappear this lockdown and covid is enough to make you think bad thoughts but with this station makes you feel like your there with the djs.

They have been a great comfort during the pandemic and lockdowns.

Very community focused and have been great getting us through lockdown!

Locked in at home during lockdown especially, local ness and community is everything - a direct link to things you know and information you need.

[My community station] have played an integral role in the community during lockdown providing support to the housebound, food bank and people in need.

My husband and I have been listening to the online church service on Sunday mornings and because of the lockdown it has been particularly helpful.

During Covid it has been very beneficial to the community in general and myself.

They have been very good at helping with the pandemic as they gave out information about what was happening in the area, what shops were open, how the covid rates affected the area.

[My community station] has been a vital part of our community during the pandemic. It has helped local communities come together and share local information and much needed support.

It would be a shame as it has provided valuable support during difficult times, including Covid.

There is always something on especially now about the covid injections.

More broadly, listeners appreciate their station because it **raises awareness of local services.**

Also, the station has done a lot of fundraising and promotions of local services such as food banks and help groups.

[It] provides local services not available elsewhere eg ask the local councillors questions.

It's been very helpful plugging our local library of which I am the Chair of the friends group.

I would miss... their fund raising.

Listeners also like that their station highlights **local good causes.**

They have always supported local charities.

It promotes an awful lot of local charities and businesses.

It supports worthy causes.

It's great to hear about local events and charities.

It's not only really well run with some excellent presenters and programmes but is also a force for good in the community.

And they welcome their station's support of **local events**.

Most of the presenters have become local celebrities and always appear at local outside events, car shows, local live band concerts, school fund raising events.

[My community station] is the last really local radio station in [town] that talks about the local area, supports local events and reflects the opinions of the community.

It helps to advertise any local events.

I feel I would miss out on hearing about interesting local events.

It promotes local music and local events. It also interviews people about events / news) topics happening in [city] or nearby which are interesting.

I would be very disappointed as you get to know the presenters over time and see them at local events/community events.

Presenters that live in the local area and get involved in the community. Always present and local events and are very approachable.

It is good for telling people about local events within our area.

[My community station] supports local public events.

Especially in Ramadan they have special events on all month.

It would be very sad as a great service promoting local and National events.

I often hear about local events that I would not otherwise find out about or bother searching for online.

It involves the community and speaks about being LGBT issues, covers big events like Newcastle Pride and brings the community together.

They also keep us up-to-date with coming events and activities.

It's a great station and for those of us organising local events it's the best way to promote things.

I have worked in partnership with the station for years where it has provided me a regular platform to share our programme of films, theatre and events at [local independent] cinema.

f) Not-for-profit

Several respondents applauded that their station was not motivated by financial aspirations.

I love that they are local and work with charities and it's not all about the money for them.

It is very local not for profit and the station is run by people interested in radio and the local community.

Listening to [my community station] on Sunday afternoon/evening offers a wide music field that no other station nationally or locally offers. To lose that would reinforce the feeling that everything is about making money rather than the enjoyment of the music and life.

There would be a big hole in the lives of a lot of lonely, and older, people who only have the radio for company and who KNOW that "their" local station, manned by people from their area, caters for them, not for some giant corporation which is only looking to make money.

[My community station] is the perfect example of how a local radio station should be: Community first, not profits.

That said, some listeners welcomed that their community station carried advertising of local relevance.

Although it is not my primary reason for listening, I would miss the local voices, the local advertising and that community connection.

I love the music variety and the local aspect to the news, adverts and occasional guests.

The station is local to the area as is the advertising.

The adverts give valuable information for services on offer to locals and travellers alike.

It's got very local advertising too.

It has local stories, local weather forecast and local adverts.

Even the commercials are advertising local businesses.

Some listeners liked that their community station carried less advertising than compared to other radio services.

Unlike commercial stations, the programmes are not over-run with adverts every few minutes, and the firms who do advertise are local and recognised by the listeners.

If [my community station] ceased on the airwaves I'd feel disappointed as it is my go to station for great music, less advertising and local presenters.

I hate advertising as much as anyone and I'm glad it's got great music uninterrupted.

3. ALTERNATIVES TO COMMUNITY RADIO

The community radio listeners in the survey found it difficult to decide on which media they would turn to should their community station stop broadcasting. Despite a range of alternative media being suggested, none received the attention of more than a fifth of listeners. Indeed, more than a fifth said either that nothing else would replace their community radio listening time, or that they simply could not think of alternative.

Whilst national BBC radio and local radio in general received the most nominations, it is notable that 'streamed music services' was the fourth most frequently mentioned alternative. This suggests total radio listening time could be reduced among this group if community radio ceased to exist.

Figure 2: Alternatives to community radio

Q. If [your community radio station] ceased to exist, which media, if any, would you turn to instead to replace it? Please select all that apply.

MEDIA SUBSTITUTES TO COMMUNITY RADIO	Community radio listeners (%)	Listeners who know someone at the community radio station they listen to (%)	Those involved with a community radio station (%)
National BBC radio	19	15	22
Local BBC radio	18	16	23
Local commercial radio	17	17	12
Streamed music services	13	18	18
National commercial radio	10	7	11
Social media	10	14	16
Local online media	8	7	14
YouTube	8	7	14
Specialist interest online media	6	4	12
Local/regional newspaper	4	5	7
Live TV	3	2	5
On-demand TV	2	4	3
National newspaper	2	1	4
Local magazine	2	1	3
Specialist interest magazine	1	1	2
National magazine	0	*	1
Other, please specify	3	3	5
Don't know	12	14	10
Nothing else	10	15	11

* less than 0.5%

APPENDIX

1. Survey respondent profile

Note: Due to the method used to conduct this research, the respondent profiles outlined below should not be relied upon to be representative of the entire UK community radio audience. The definitive source of radio audience estimates and demographic profiles is RAJAR, the body in charge of measuring UK radio audiences.

In very general terms, those community radio listeners who participated in the survey were relatively more likely to have the following demographic characteristics:

- Aged 45-64 (52%)
- Male (57%)
- Work full-time (53%), plus a fifth retired (21%)
- Social grade ABC1 (67%)
- Married or living as part of a couple (66%)
- Live in households comprising two adults (59%)
- Live in households with no children (74%)
- Own their own home (69%)
- White ethnic group (91%)

Seven in ten respondents (70%) first tuned to their community station more than a year ago. A fifth (20%) first listened to it over five years ago, suggesting a relatively high degree of loyalty.

2. Community Radio stations listened to by survey respondents

10 Radio
1BTN
3TFM Community Radio for Health
Abbey 104
ABC FM
Academy FM 105.9 (Folkestone)
AIR
ALL FM
Awaaz FM (Southampton)
Awaz FM (Glasgow)
BCB 106.6 FM
Beat Radio
Belfast FM
BFBS Aldershot
Black Cat Radio
Black Country Radio
Black Diamond FM
Bolton FM
Bradley Stoke Radio
Bristol Community FM (BCFM)
BRO Radio
Burgess Hill Radio
Cabin FM
Cambridge 105 FM
Canalside's The Thread
Cando FM
Carillon Wellbeing Radio
Castledown FM
Celtic Music Radio
Chelmsford Community Radio
Coast and County Radio (Scarborough)
Coast FM
Community Voice FM
Cross Rhythms City Radio (Stoke on Trent)
Cumbernauld FM
Dales Radio
Diverse FM
Drive 105 FM
Drystone Radio
Dunoon Community Radio
East London Radio
East Coast FM
Endeavour FM
Erewash Sound
Exmouth AIR
Fantasy Radio
Fever FM

Fiesta FM
Forest FM
fUse FM
Future Radio
Gateway 97.8
Gloucester FM
Gravity FM
Great Driffield Radio
GTFM Pontypridd
Harborough FM
Harbour Radio
Harrogate Community Radio
HCR FM
Hermitage FM
Hope FM
Hot Radio 102.8
Ipswich Community Radio
Islands FM 107.9
Jorvik Radio
K107 FM
KCR
KeeP 106
Keynsham Town Community Radio
Leicester Community Radio
Link FM
Lionheart Radio
Maritime Radio
Mearns FM
MKFM
Nevis Radio
Ninesprings FM
NLive Radio
North Manchester FM
Nova Radio North East 102.5 FM
Oldham Community Radio
Park Radio
Penistone FM
Phoenix FM
Phonic FM
Pride FM
Quay FM
Radio Cardiff
Radio Caroline
Radio LaB
Radio Leyland
Radio Newark
Radio Newquay
Radio Plus
Radio Saltire

Radio Skye
Radio Tircoed
Radio Tyneside
Radio Verulam
Radio Wimborne
Radio Wymondham
Radio2Funky
Raidio Failte
Red Kite Radio
Reprezent 107.3 FM
Resonance FM
Rhondda Radio
Riverside Radio
RNIB Connect Radio
Rossendale Radio
Salaam Radio
Salford City Radio
Seahaven FM
Seaside FM 105.3
Sedgemoor FM
Sescot Radio
SFM 106.9
Sheppey FM
shmu FM
Shoreline
Sine FM
Siren FM
Somer Valley FM
Source FM
Spark FM
Susy Radio
Swindon 105.5
Tempo 107.4 FM
The Beat London 103.6FM
The Eye
The Voice
This is the Coast
Thornbury Radio
Tone FM
Uckfield FM
Ujima Radio
Unity 101 (Southampton)
Unity FM (Birmingham)
Vectis Radio
Vintage Radio
Voice FM
WCR (Warminster)
WCR FM (Wolverhampton)
West Hull Community Radio

West Somerset Radio
Westside 89.6 FM
Winchester Radio
Wirral Wave
Witney Radio
Wythenshawe FM
Your FM
Zetland FM