

# 09 10 CAIRNS MEDIA USAGE SURVEY





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WELCOME

In 2007, Compass Research conducted the first Cairns Media Usage Survey: a research project aimed at measuring the use of local media by Cairns residents and to determine the effectiveness of different advertising media.

Since then, there is no doubt that the Global Financial Crisis has impacted the Cairns market, and changed the way residents use and consume media. Now in its third year, the 09/10 Cairns Media Usage Survey provides a snapshot of the changing Cairns media environment.

As our city continues to grow, so too does the number of media options available to advertisers and consumers. Coupled with a more discerning consumer market, it is now more important than ever for businesses to identify where their advertising dollars are used most effectively.

2009 saw the introduction of a new commercial radio station and the anticipated launch of Digital Television, fragmenting local Radio and Television audiences. Print media continues to provide access to a wide range of consumers locally, while Online usage within Cairns has remained strong.

To obtain the data contained in this report, 500 telephone interviews were conducted among residents, aged 15+ years. The sample was structured by age and gender in accordance with updated Australian Bureau of Statistics data for residential population in the area.

I hope you find this report valuable and welcome your comments and feedback.

**Bill Cummings**  
**Compass Research**





## METHODOLOGY

A random sample telephone survey was conducted of 500 residents aged 15+ in the Cairns City Council area as defined before the 2008 local government boundary changes. The sample was structured in accordance with information on residential population in the area by age and gender.

Fieldwork was conducted between Oct 7-18 2009. Interviewing was conducted from the offices of Compass Research, Cairns, between 5pm-8pm weekdays, 9am-6pm Saturdays and 10am-6pm Sundays. Up to 3 call backs were made to each selected number, before replacement.

Data has been weighted by the Cairns population sex and age. Figures have been based on a population aged 15+ years of 118,000 as at June, 2009. The maximum margin of error at the 95% probability level is +/-4.4% for the random sample of 500.

*NOTE: All information used should be sourced as; Cairns Media Usage Survey, Compass Research, Oct 2009, n=500.*

### COMPASS RESEARCH

38 Grafton St (PO Box 2148)

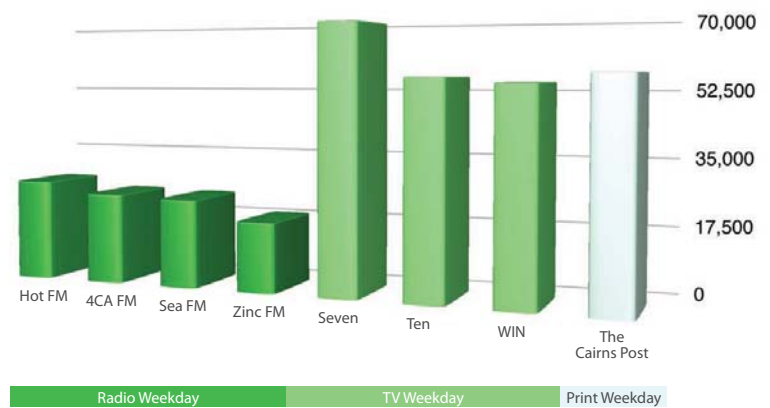
CAIRNS QLD 4870 Tel: 4031 2888

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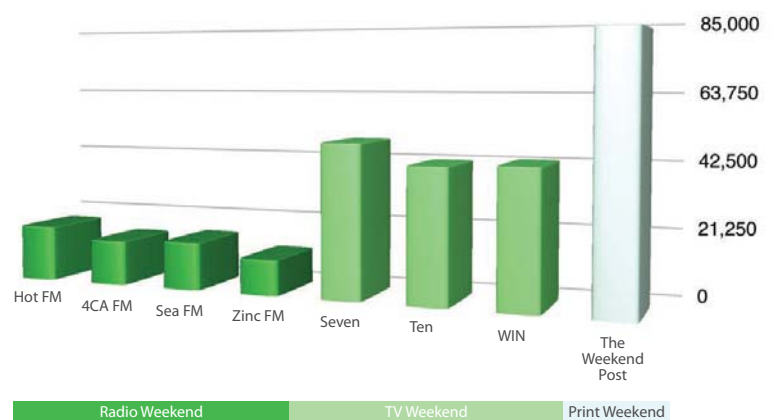


# SUMMARY OF CAIRNS MEDIA

Media Reach - Weekday



Media Reach - Weekend



## SUMMARY OF AUDIENCE REACH

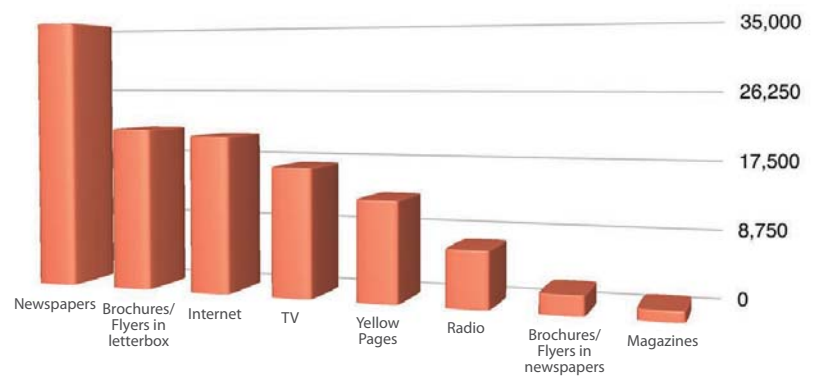
	TYPICAL WEEKDAY		TYPICAL WEEKEND		TYPICAL WEEKLY		TYPICAL MONTHLY	
	N	% Reach	N	% Reach	N	% Reach	N	% Reach
<b>RADIO</b>								
<b>Hot FM</b>	25,690	22.0%	16,992	19.4%				
<b>ABC Far North</b>	24,780	21.0%	18,408	15.6%				
<b>4CA FM</b>	23,128	19.6%	13,425	11.4%				
<b>Sea FM</b>	22,656	19.2%	14,396	12.2%				
<b>Zinc FM</b>	17,700	15.0%	10,384	8.8%				
<b>TELEVISION</b>								
<b>Seven</b>	69,384	58.8%	47,672	40.4%				
<b>Ten</b>	55,224	46.8%	41,300	35.0%				
<b>ABC</b>	54,516	46.2%	47,200	40.0%				
<b>WIN</b>	54,044	45.8%	42,008	35.6%				
<b>PRINT</b>								
<b>The Cairns Post (M-F)</b>	56,168	47.6%						
<b>The Weekend Post</b>			82,305	69.8%				
<b>Cairns Sun</b>					61,360	52.0%		
<b>Cairns Bulletin</b>							7,967	6.8%
<b>Cairns Eye</b>							39,727	33.7%
<b>CityLife Magazine</b>							33,827	28.7%



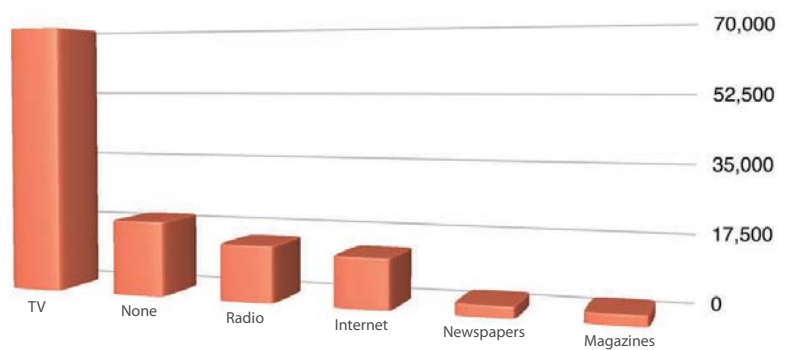
## MEDIA MOST USEFUL

Newspapers offer the most effective way to inform customers on a range of products and services. The Internet and Brochures are also valuable tools for consumers when seeking information on retail goods. Television and Radio were generally lower.

Overall, which do you think is the most useful advertising medium for you?



If you could remove advertising from any single media stream, which would you remove it from?





## Which media would you find most useful when looking for information on...?

	NEWSPAPER	INTERNET	BROCHURE - LETTERBOX	YELLOW PAGES	MAGAZINE	BROCHURE - PAPER	TV	RADIO
New or Used Cars	70,328	35,512	708	4,720	1,888	236	944	236
Real Estate	67,496	42,480	236	1,416	708	472	236	0
Local Entertainment	79,532	17,936	944	708	1,888	708	4,248	3,776
Jobs	70,092	33,040	236	13,688	472	0	472	0
Homewares	19,116	12,508	45,784	5,664	3,304	10,856	5,664	472
Groceries	14,868	2,832	64,900	236	944	6,372	1,652	236
Major Retailer Sale	22,892	9,912	42,244	1,180	472	15,340	13,452	472
White Goods	13,688	16,756	41,300	3,776	472	14,632	9,204	1,180
Electronic Goods	11,564	19,352	44,132	2,360	708	14,160	8,260	708
Restaurants	29,972	14,868	2,360	34,220	2,596	472	5,428	1,416
Trades & Services	28,792	13,688	236	62,540	0	0	944	0
Financial Services	11,092	37,760	944	31,152	944	236	4,248	472
Fashion	12,744	11,328	26,196	1,888	19,116	3,776	5,192	0

Top 2 media in each category highlighted



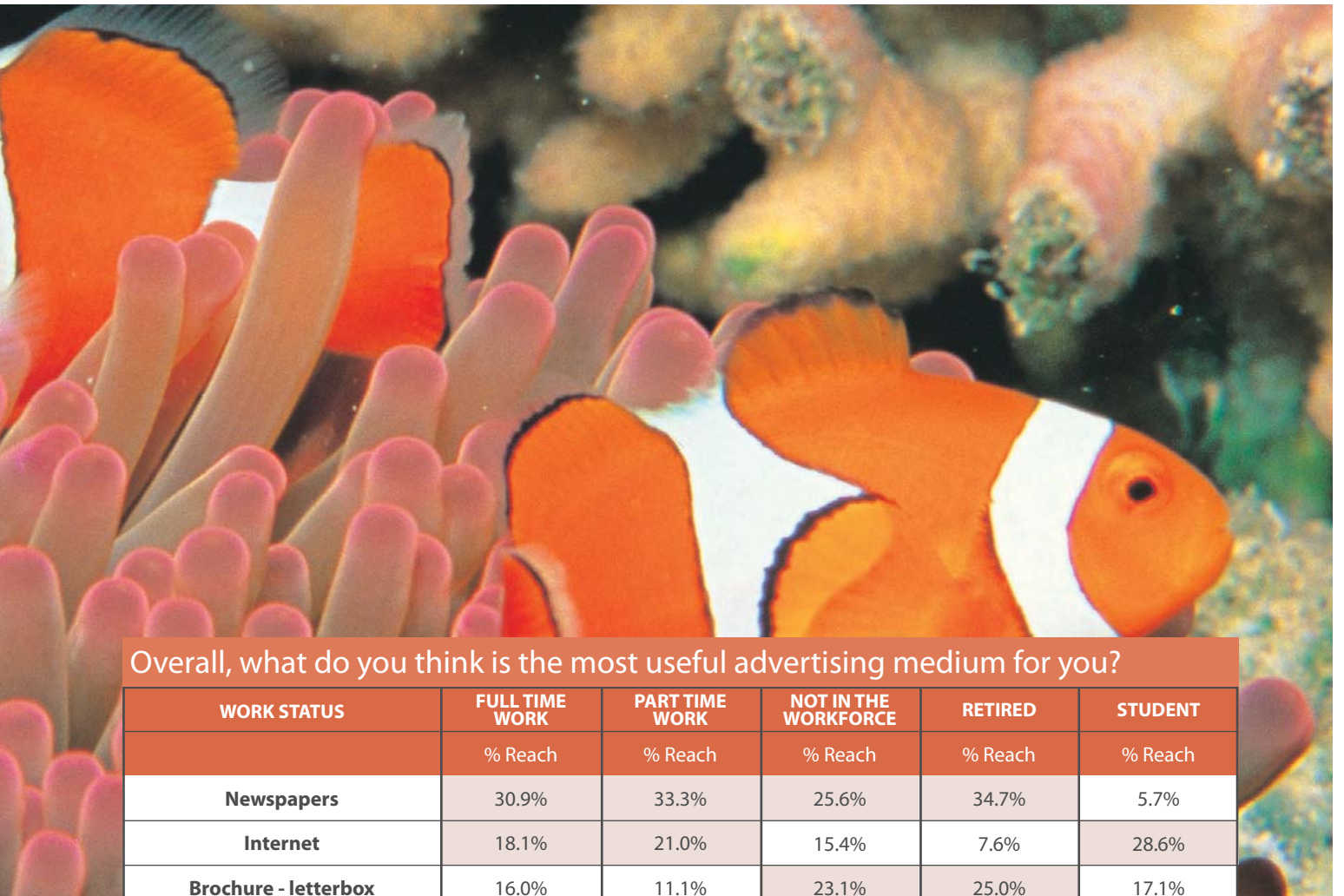
## MEDIA MOST USEFUL

The Internet and Television are effective at reaching the younger market, in particular students. However, Newspapers are rated as the most useful advertising medium when targeting adults aged 25+.

...Cairns residents rate Newspapers as the most useful advertising medium overall...



COMPASS



Overall, what do you think is the most useful advertising medium for you?

WORK STATUS	FULL TIME WORK	PART TIME WORK	NOT IN THE WORKFORCE	RETIRED	STUDENT
	% Reach	% Reach	% Reach	% Reach	% Reach
Newspapers	30.9%	33.3%	25.6%	34.7%	5.7%
Internet	18.1%	21.0%	15.4%	7.6%	28.6%
Brochure - letterbox	16.0%	11.1%	23.1%	25.0%	17.1%
Television	13.2%	12.3%	5.1%	9.8%	40.0%
Yellow Pages	9.9%	11.1%	17.9%	12.0%	0.0%
Radio	6.6%	6.2%	7.7%	3.3%	5.7%
Brochure - in paper	1.6%	3.7%	2.6%	1.1%	0.0%
Magazines	1.2%	0.0%	2.6%	0.0%	0.0%
Other/Don't Know	2.5%	1.2%	0.0%	6.5%	2.9%
TOTAL	100%	100%	100%	100%	100%

AGE	15-19 Years	20-24 Years	25-34 Years	35-44 Years	45-54 Years	55-64 Years	65+ Years
	% Reach	% Reach	% Reach	% Reach	% Reach	% Reach	% Reach
Newspapers	12.8%	16.6%	21.0%	26.5%	37.5%	39.5%	34.5%
Internet	33.3%	30.0%	25.2%	24.5%	9.4%	3.7%	10.7%
Television	33.3%	26.6%	12.6%	7.1%	8.3%	14.8%	14.3%
Brochure - letterbox	7.7%	11.9%	15.4%	21.4%	20.8%	16.0%	19.0%
Yellow Pages	0.0%	6.7%	4.2%	8.2%	15.6%	17.3%	13.1%
Magazines	0.0%	0.0%	4.2%	0.0%	1.0%	0.0%	0.0%
Radio	10.3%	6.7%	8.4%	8.2%	3.1%	4.9%	2.4%
Brochure - in paper	0.0%	0.0%	8.4%	1.0%	2.1%	0.0%	0.0%
Other/Don't Know	2.6%	1.4%	0.7%	3.1%	2.1%	3.7%	6.0%
TOTAL	100%	100%	100%	100%	100%	100%	100%

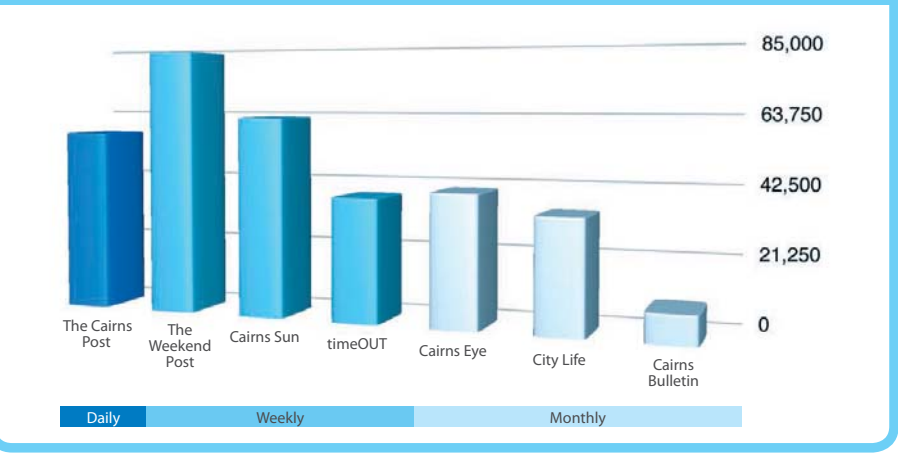


PRINT

The Weekend Post is Cairns’ most read print media per issue. It is read by 70% of residents every week. The monthly edition of Cairns Eye has come out as the most read local magazine, being read by nearly 20% more readers than City Life.

...The Cairns Post is read by an average of nearly one in two Cairns residents on weekdays...

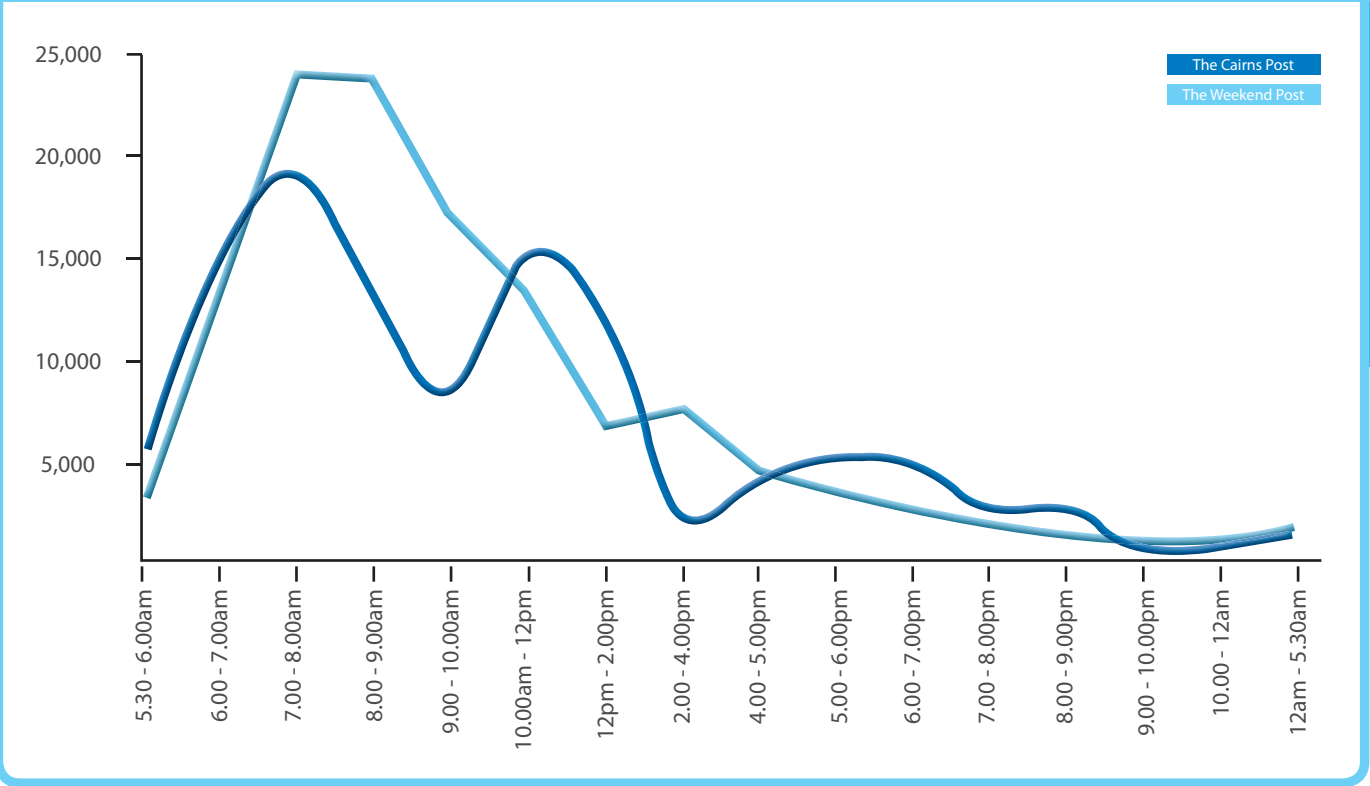
Print Media - per issue



Average No. of Issues Read	
	AVERAGE ISSUES READ
The Cairns Post	2.38 per week
The Weekend Post	2.79 per month
Cairns Sun	2.08 per month
Cairns Eye Magazine	4.04 per year
CityLife Magazine	3.44 per year
Cairns Bulletin	0.81 per year

...The Weekend Post  
is read by 7 out of 10  
Cairns residents...

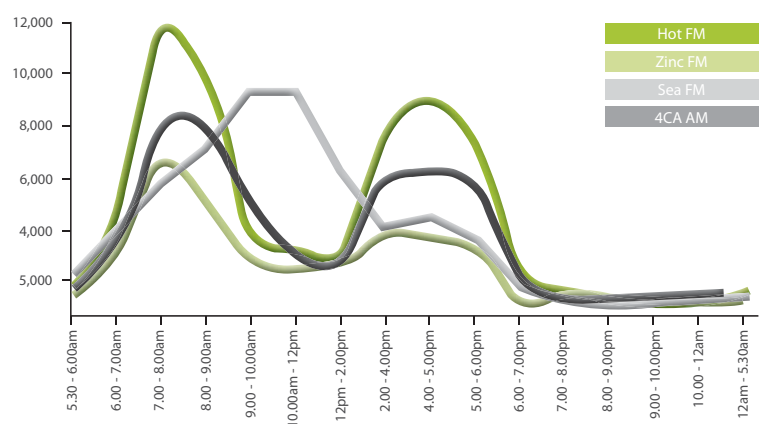
What times do you read The Cairns Post and The Weekend Post?



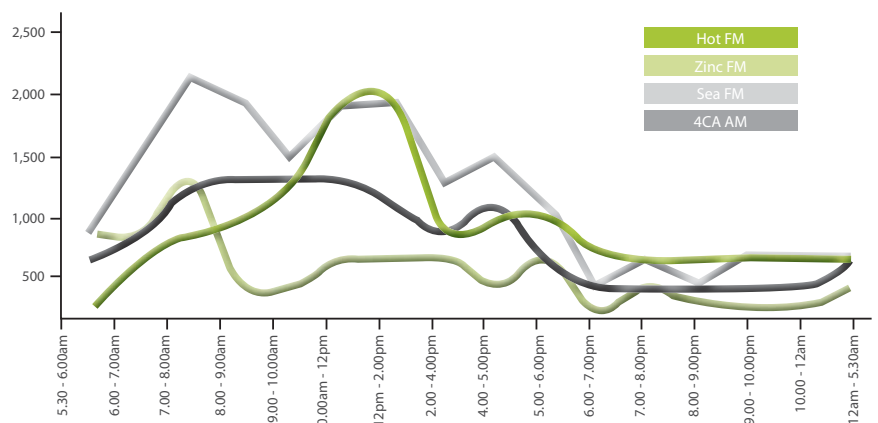
# RADIO

The total number of Radio non-listeners has showed an increase in 2009 over 2008. In particular, fewer people are tuning into the leading Commercial Radio Stations, with the introduction of Zinc FM splitting market share.

What times do you listen to commercial radio on weekdays?



What times do you listen to commercial radio on weekends?





## On a typical day, which stations do you listen to?

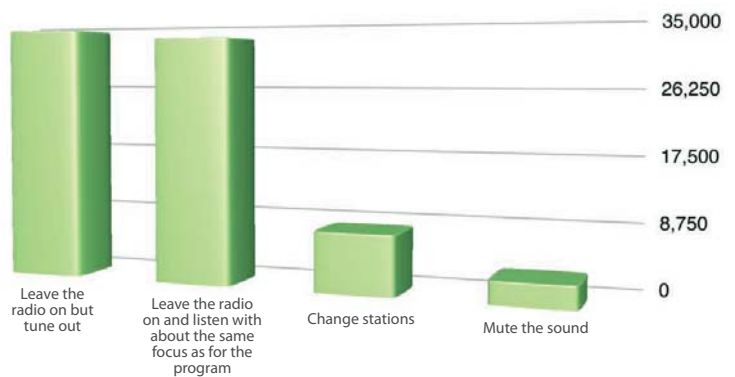
	WEEKDAY		WEEKEND	
Station	N	% Reach	N	% Reach
Hot FM	25,960	22.0%	16,992	14.4%
ABC Far North	24,780	21.0%	18,408	15.6%
4CA AM	23,128	19.6%	13,452	11.4%
Sea FM	22,656	19.2%	14,396	12.2%
Zinc FM	17,700	15.0%	10,384	8.8%
Triple J	11,092	9.4%	10,384	8.8%
ABC Radio National	9,912	8.4%	7,788	6.6%
4KZ	3,540	3.0%	3,068	2.6%
ABC Classic	3,540	3.0%	2,596	2.2%
ABC News	3,068	2.6%	1,888	1.6%
Bumma Bippera Indigenous	2,832	2.4%	1,888	1.6%
Coast FM	1,180	1.0%	944	0.8%
4AM	944	0.8%	472	0.4%
4TAB	944	0.8%	1652	1.4%
4CCR FM	708	0.6%	708	0.6%
Kiss FM	236	0.2%	0	0.0%
Other/Not Sure	4,012	3.4%	13,452	11.4%
Don't Listen	17,228	14.6%	36,816	31.3%
<b>Radio Listeners - All Stations</b>	<b>99,592</b>	<b>85.4%</b>	<b>80,004</b>	<b>67.8%</b>



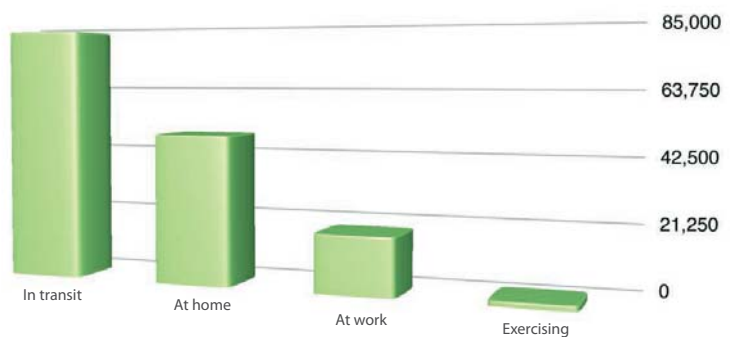
## RADIO

...3 out of 5 listeners don't listen to radio advertising with the same attention as they do for the program...

For those listening to commercial radio, what do you do when you hear an advertisement on radio?



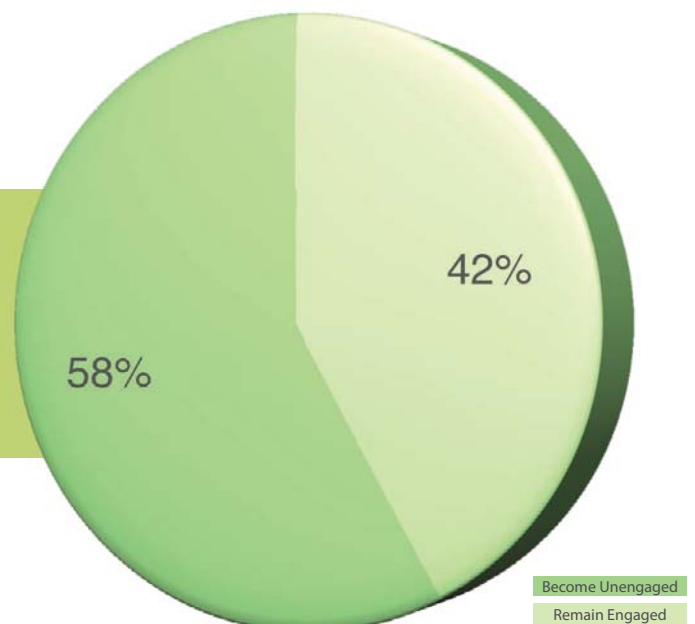
Where do you typically listen to the radio?





For those listening to commercial radio, what do you do when you hear an advertisement on radio? (combined)

(Mute the sound, tune out or change stations)

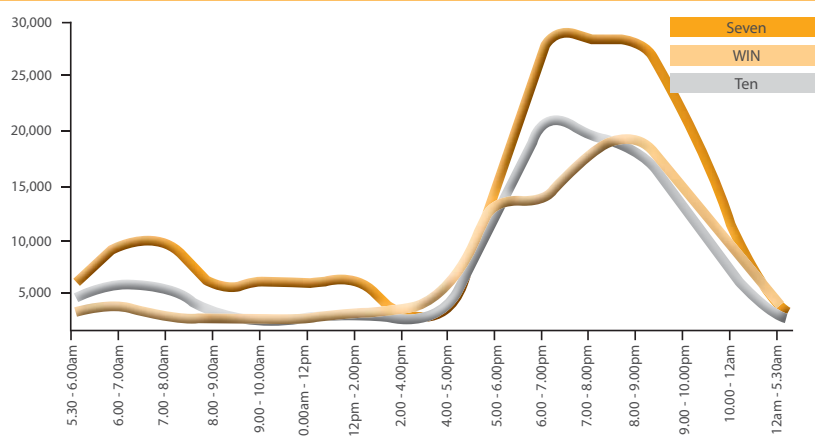




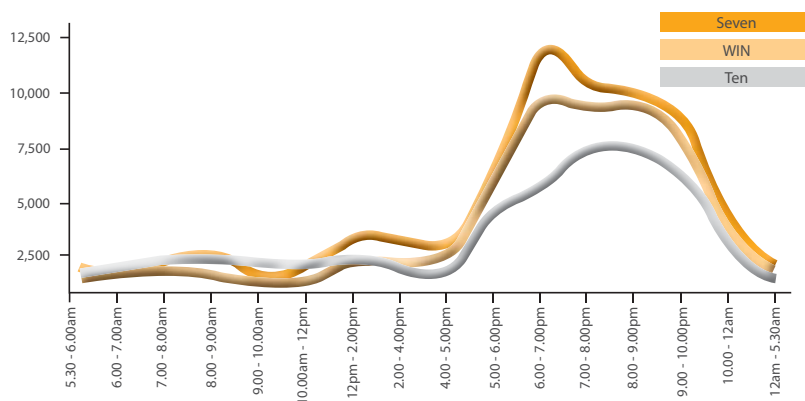
# TELEVISION

ABC and SBS have attracted more viewers in 2009, with the ABC replacing WIN as the third most watched station. The recent introduction of Digital TV has attracted nearly 10% of the Cairns market, and this share is likely to increase in 2010 - 2011 as more viewers switch to Digital.

What times do you watch commercial TV on weekdays?



What times do you watch commercial TV on weekends?



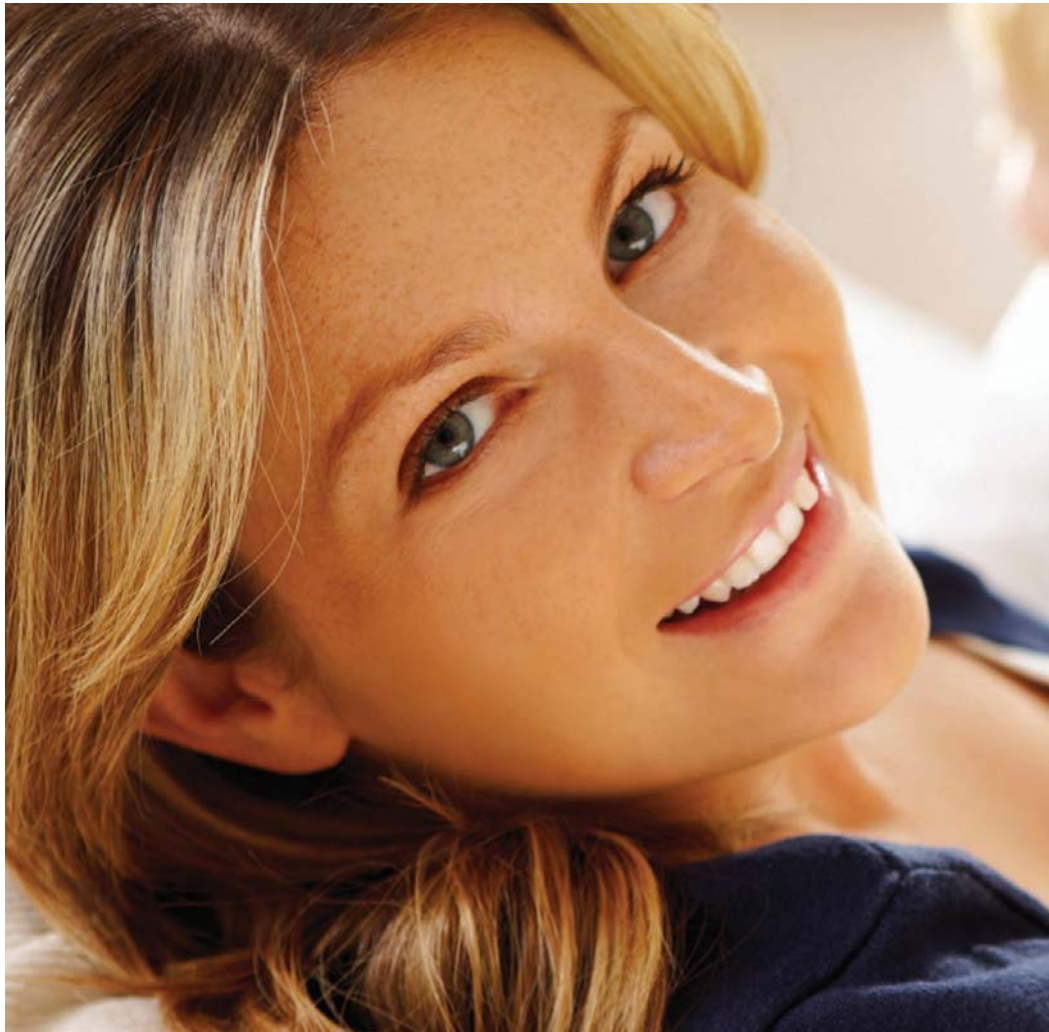
On a typical day, which channels do you watch?

CHANNEL	WEEKDAY		WEEKEND	
	N	% Reach	N	% Reach
Seven	69,384	58.8%	47,672	40.4%
Ten	55,224	46.8%	41,300	35.0%
ABC	54,516	46.2%	47,200	40.0%
WIN	54,044	45.8%	42,008	35.6%
SBS	37,288	31.6%	32,332	27.4%
Austar/Select TV	22,184	18.8%	21,004	17.8%
ABC2	4,956	4.2%	4720	4.0%
GO! (WIN)	5,192	4.4%	3776	3.2%
ONE (Ten)	1,888	1.6%	1652	1.4%
SBS2	1,652	1.4%	1652	1.4%
Other Digital Channels	1,888	1.6%	1888	1.6%
Don't Know	5,664	4.8%	17,936	15.2%
Don't Watch	5,900	5.0%	11,092	9.4%
Other	1,416	1.2%	1,416	1.2%
TV Viewers - All Stations	112,100	95.0%	106,908	90.6%



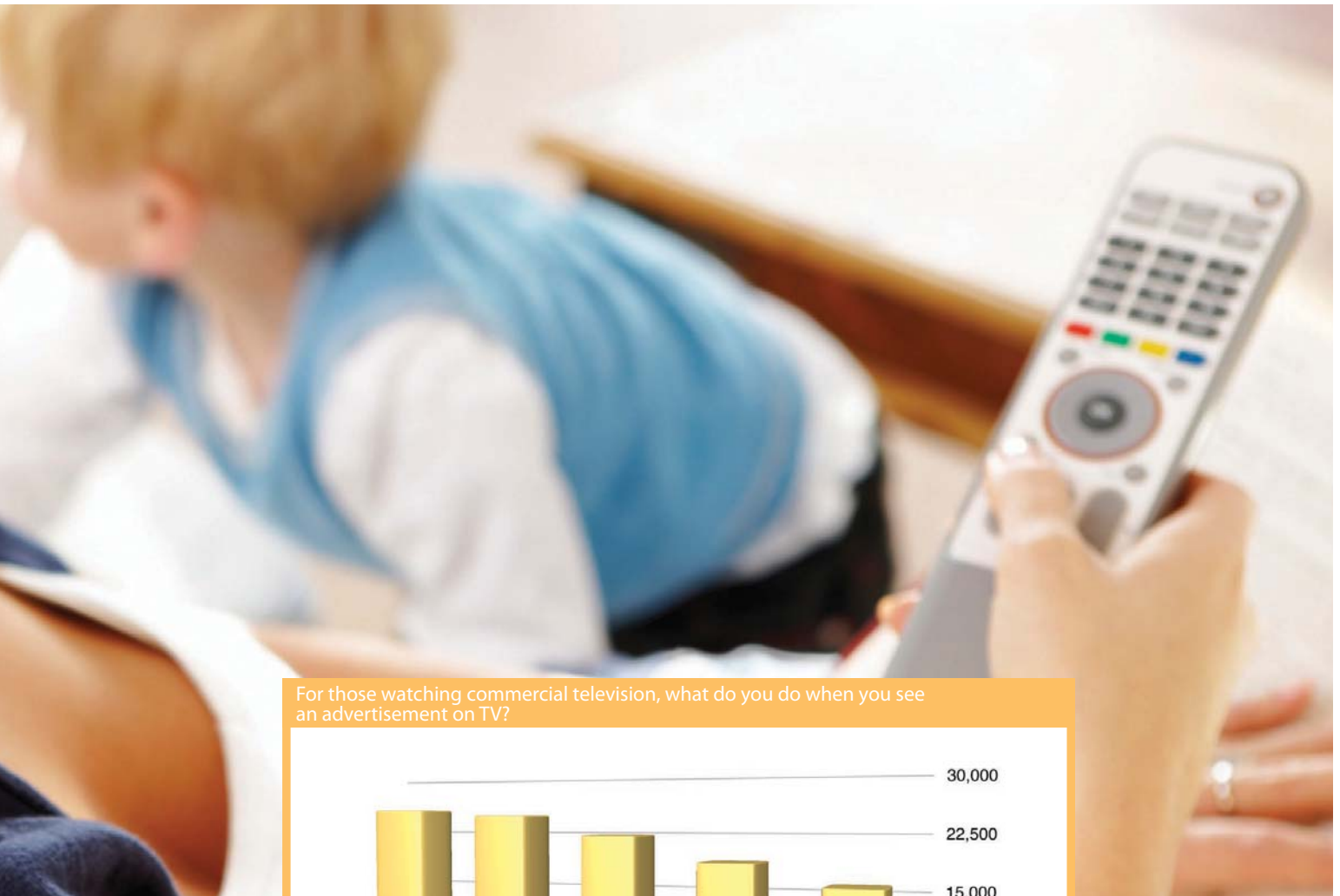


## TELEVISION

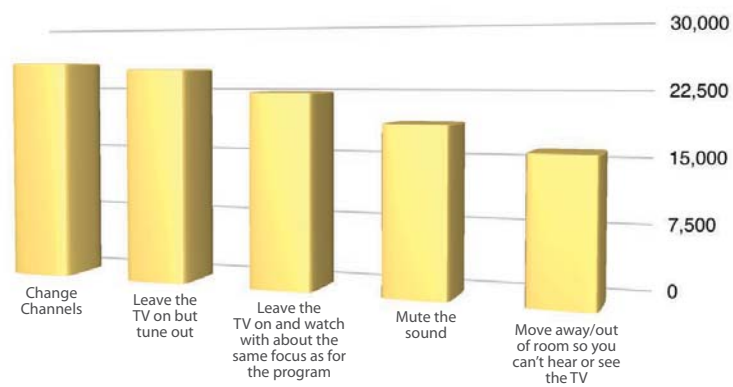


...4 out of 5  
viewers don't  
pay the same  
attention to TV  
advertising as  
they do for the  
program...



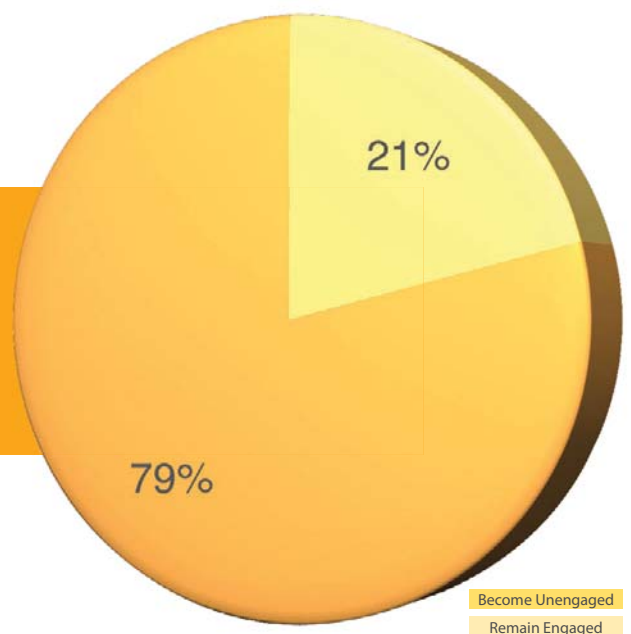


For those watching commercial television, what do you do when you see an advertisement on TV?



For those watching commercial television, what do you do when you see an advertisement on TV? (combined)

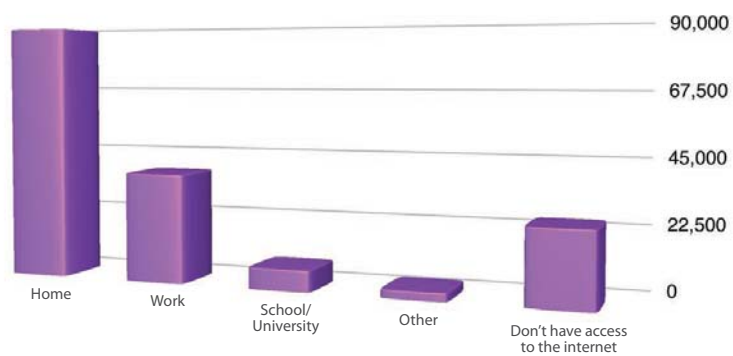
(Mute the sound, tune out, change stations, move away/out of room so you can't hear or see the TV)



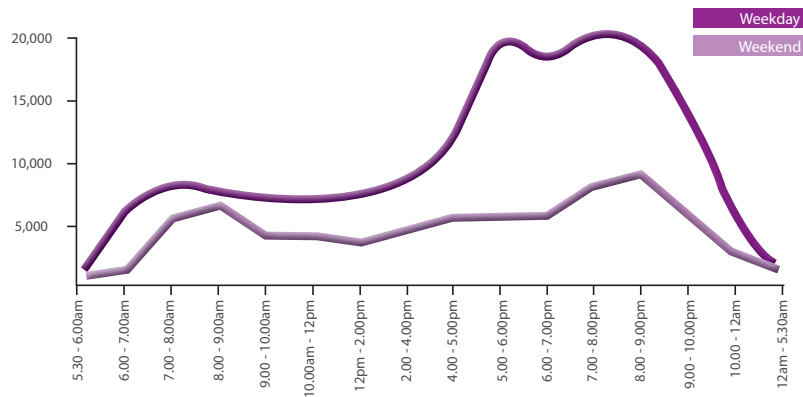
## ONLINE

94% of Cairns internet users typically use the Internet at home, while 40% of users also go online while at work. Online activity is highest during the evenings, as the Internet continues to encroach on Television's viewer base during the prime time period.

Where do you typically use the internet?

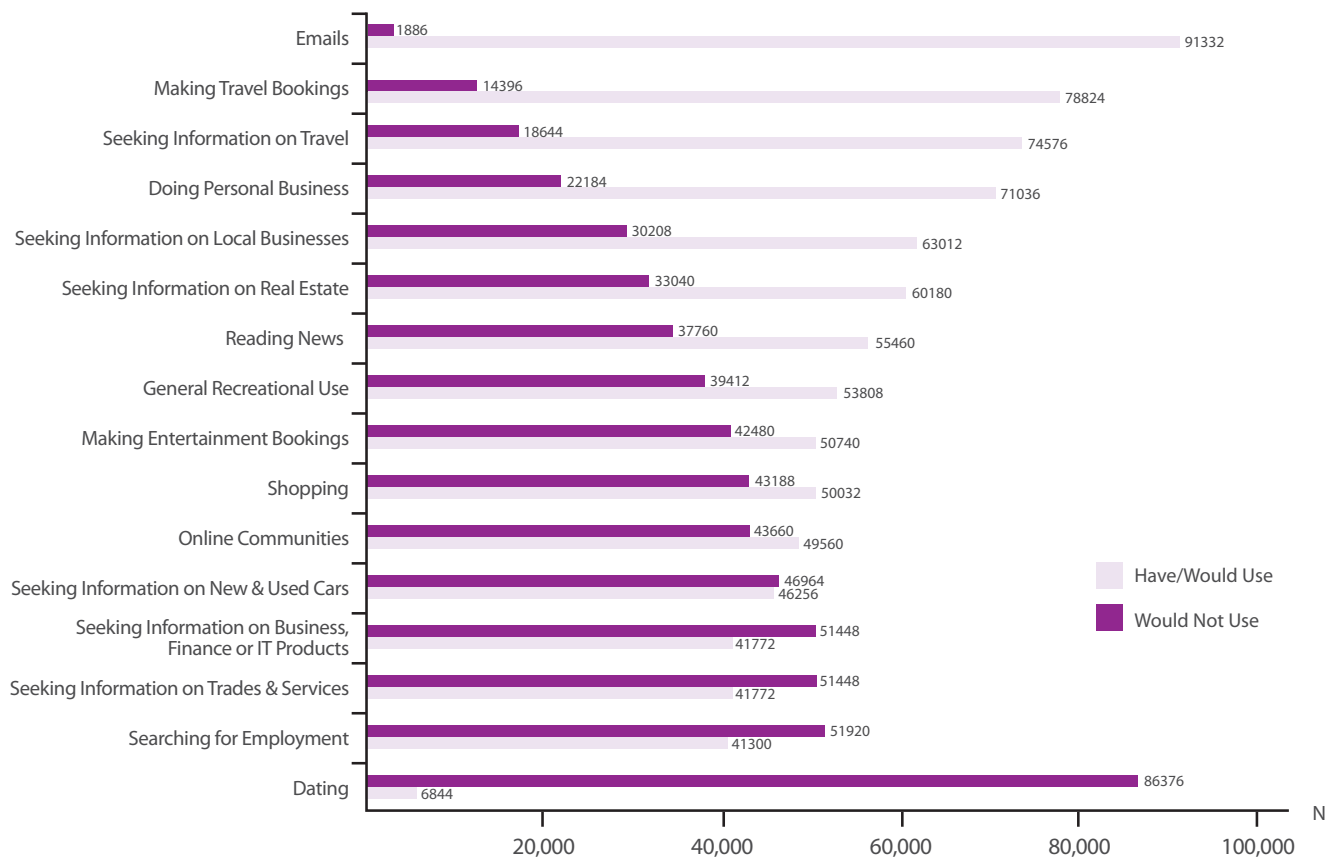


What times do you use the internet?



...79% of Cairns residents use the internet, 64% use it daily...

Which of the following have you, or would you use the internet for? Which of the following would you not use the internet for?



## MARKET CHANGES

...the number of listeners tuning into Cairns radio declined by 7% in 2009...

### RADIO

The introduction of Zinc FM has captured a share of the local commercial radio market, reducing the weekday audience of Hot FM by 35%, 4CA AM by 30% and Sea FM by 16%.

### TELEVISION

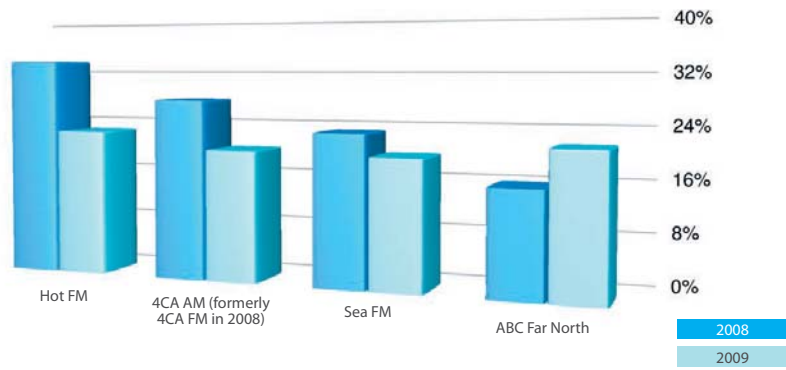
2009 has seen an overall decline in the number of viewers tuning into local Commercial Television. Seven, WIN and Ten have lost market share not only to the ABC and SBS, but also to the range of additional Free to Air Digital TV Channels introduced in 2009.

...10% of the Cairns television market now tune into Digital TV...

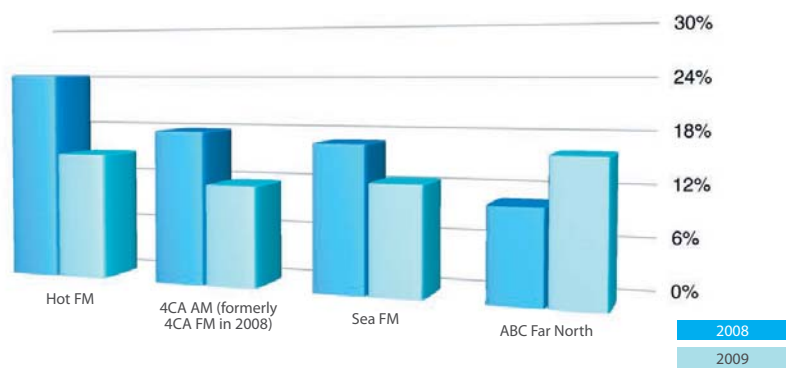




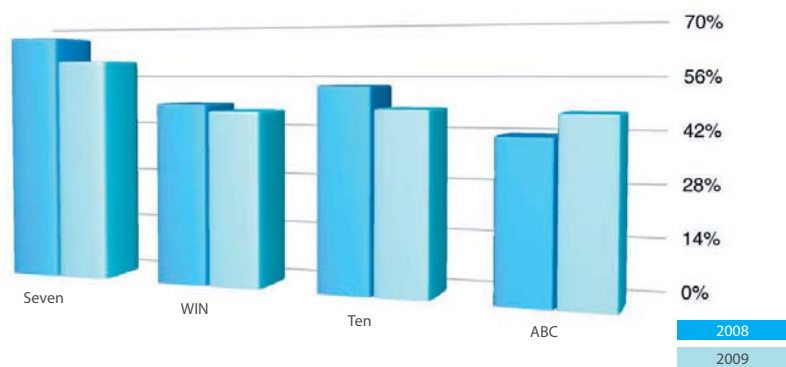
### Radio Reach - Weekday



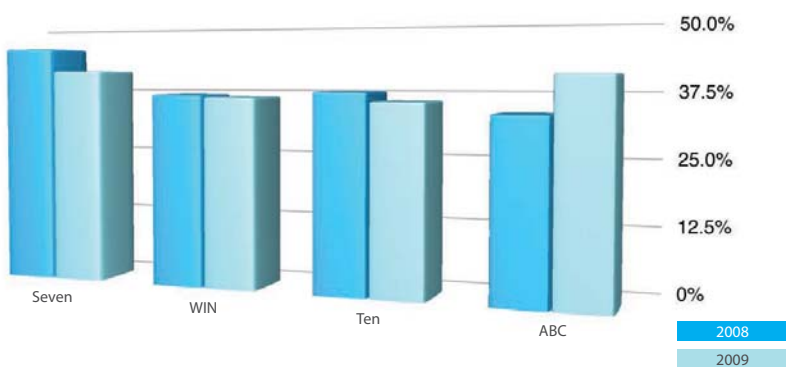
### Radio Reach - Weekend



### Television Reach - Weekday



### Television Reach - Weekend





COMPASS  
RESEARCH



#### About Compass Research

Since its inception in 1981 as WS Cummings Economic Research Services, the firm has been carrying out market research, more recently as Compass Research. Projects are carried out by a team highly experienced in survey design, questionnaire development, interviewing, data entry and analysis and are personally supervised by WS (Bill) Cummings who has had over 20-years experience in organising and carrying out market research tasks. The firm is a long standing member of the Australian Market & Social Research Society.

This report can be downloaded at [www.compassresearch.net.au](http://www.compassresearch.net.au)







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