



COMMUNITY  
BROADCASTING  
ASSOCIATION OF  
AUSTRALIA

# STATE OF THE COMMUNITY BROADCASTING SECTOR

MARCH 2019



# WELCOME...

## Welcome the State of the Community Radio Sector Report – March 2019

The first of its kind, the State of the Sector report brings together a range of data sources to provide insights into Australia's largest independent media sector, a key pillar in local broadcasting and internationally recognised example of grassroots media – community broadcasting.

It shows the sector's important contribution to the diversity, inclusiveness and social cohesion that characterises Australia's open society and reinforces its cultural vibrancy by:

- Providing a voice to communities not adequately served by other broadcasters.
- Giving a platform to a diverse range of viewpoints that enrich our social and cultural fabric and promote media diversity.
- Providing social inclusion, local community participation and media access in the public interest.
- Supporting local content production and delivering content tailored to the needs and interest of local communities.

This report encompasses data for a period of significant success and ongoing challenges. With more stations and listeners than ever, it is evident that community radio remains ever important to Australians and provides services that address identified community needs and interests.

Pictured above: 4EB's Maureen Mopio (right) in the studio with Veronica Henderson, President of the Brisbane Bougainville Group.

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In a media landscape responding to legislative reforms and engaging with emerging technological challenges, the sector's role in general, and particularly in regional Australia is more crucial than ever. Community broadcasters provide continued access to local news and information and opportunities to participate in media production and programming.

Stations operate on a not-for-profit basis, bound by the legal constraints on charities, associations and media organisations and face challenges including:

- Limited and complex workforce (volunteer driven; high turnover)
- Financial sustainability
- Media and technology develops and changing consumer trends (mainstream transition of podcasts, on demand streaming services)
- Capacity building for continued growth (particularly in governance and small business skills)

The sector is well positioned to meet these, however, with the support of a record six million weekly listeners, 26,000+ volunteers and thousands of financial members and subscribers. In addition, community radio enjoys cross-partisan Federal Government support and recognition for its important contributions to media diversity, social development, cultural infrastructure and serving special cultural needs.

*This report is created by the Community Broadcasting Association of Australia (CBAA), which champions community radio by building station capability and creating a healthy environment for the sector to thrive. Almost 90% of permanently licensed community radio broadcasters are CBAA members<sup>1</sup>.*



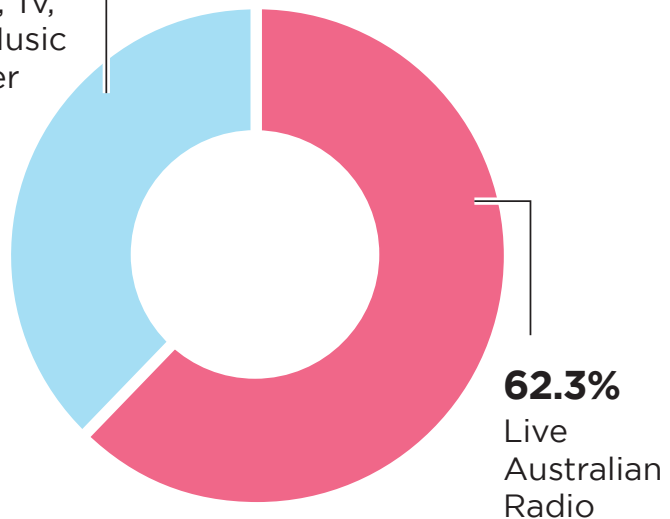
Pictured: Helen Jennings  
OAM, presenting on  
Melbourne's PBS 106.7 FM.

# THE RADIO STAR LIVES ON

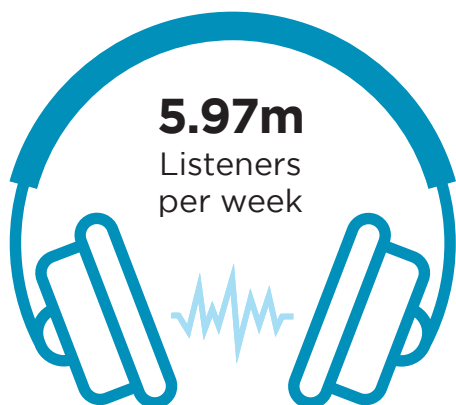
Despite a proliferation of alternative audio and other media, radio continues to shine bright in Australia, with audience numbers remaining consistent over the past 15 years as a percentage of the population. In 2018, **84% of Australians** listened to any radio (commercial, ABC/SBS & community) in your average week<sup>2</sup>.

Alongside this, radio's place alongside other audio listening formats holds strong, with 62.3% of all audio listening being live Australian radio (the remainder is a mix of music streaming, owned music, podcasts, online music videos, other audio, audiobooks, TV music channels and other radio<sup>3</sup>).

Streaming,  
Podcasts, Tv,  
Owned Music  
And Other  
Sources



## COMMUNITY RADIO HAS MORE LISTENERS THAN EVER



Average hours a  
week spent listening  
to community radio



Community broadcasting is thriving, and it shows.

Audience research released in December 2018 shows that highest national listening audience on record. Almost 6 million Australians listen to community radio each week - that's 30% of Australians aged 15+ years.

Of these, 16% listen to community radio only (not commercial or ABC/SBS).

Awareness of community radio is also increasing, up to 77% in 2018, from 74% in the previous year<sup>4</sup>.

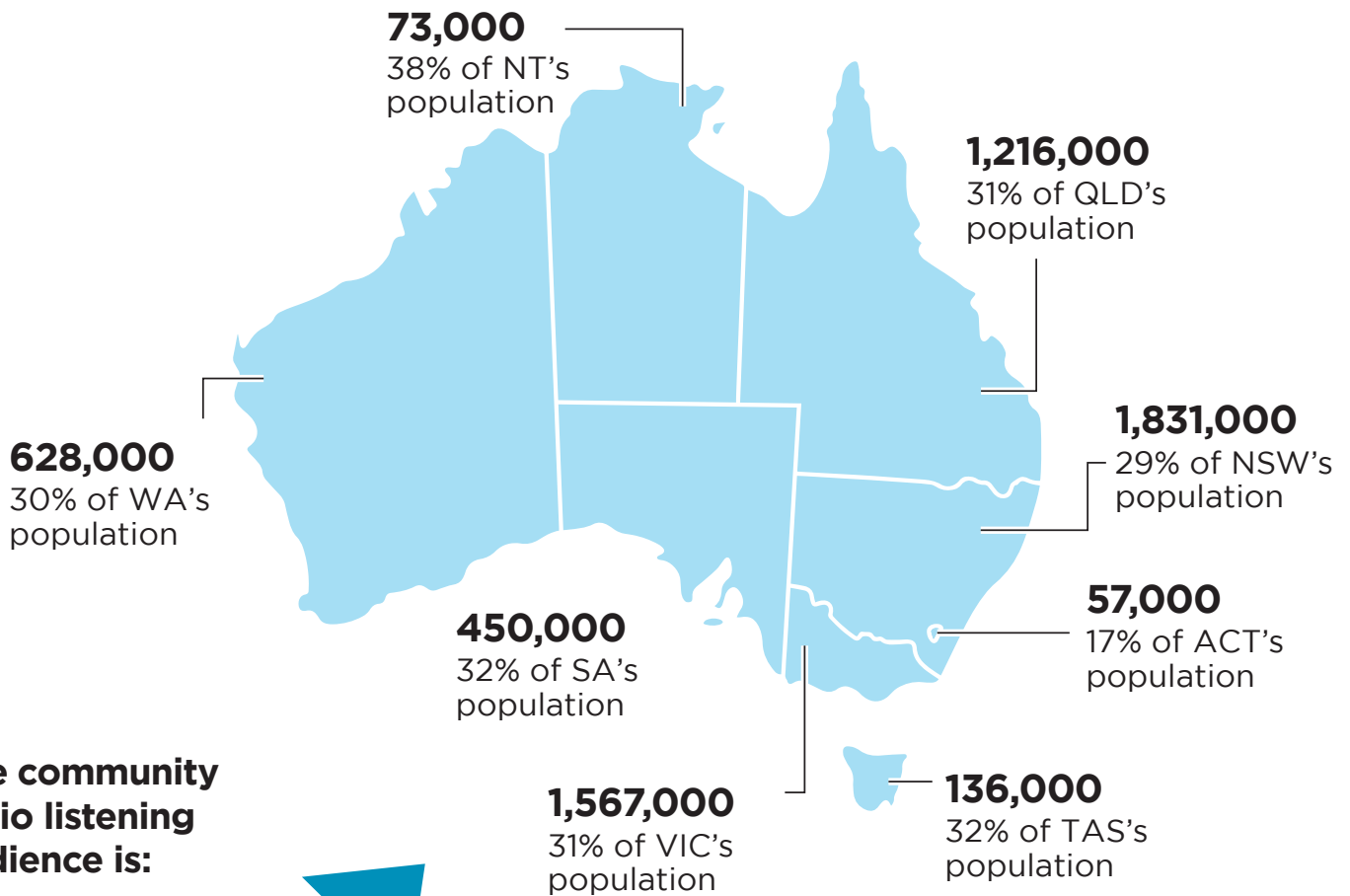


# WHO LISTENS

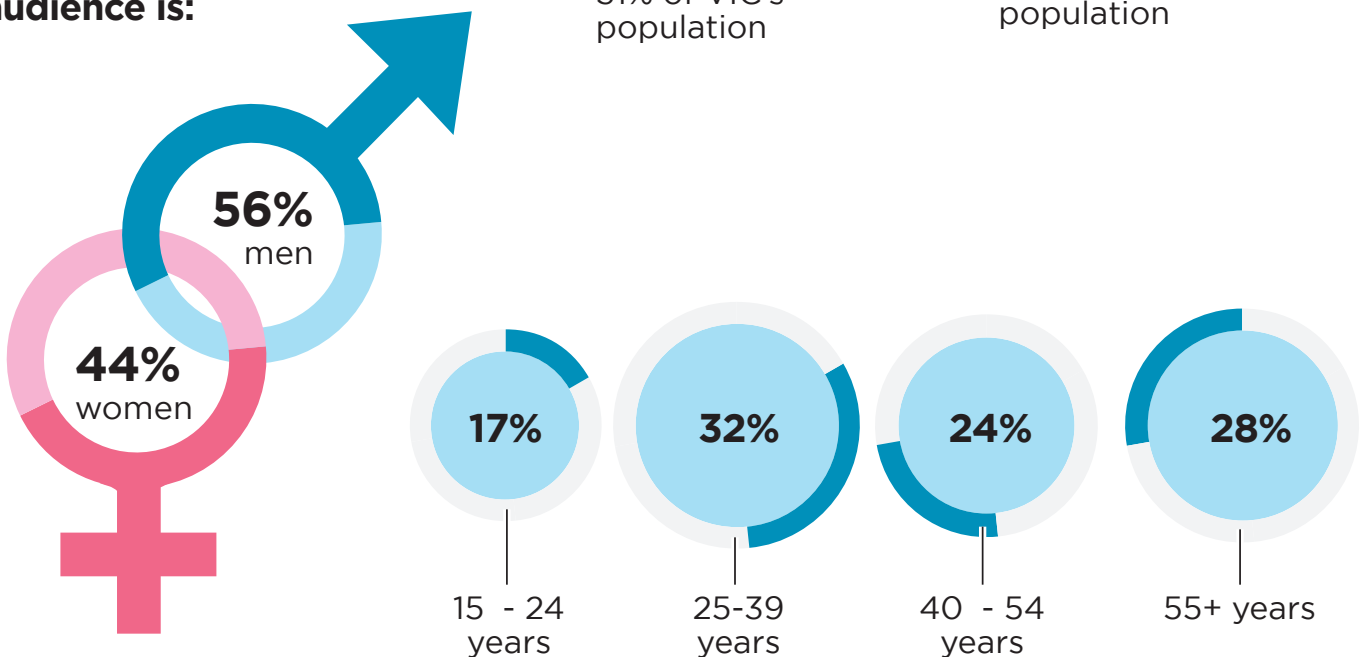
Community radio serves a large and diverse national audience.

People from every State & Territory listen to community radio. 1.784 million of these listeners are in non-metropolitan areas (28% of non-metropolitan population aged 15+ years)<sup>5</sup>.

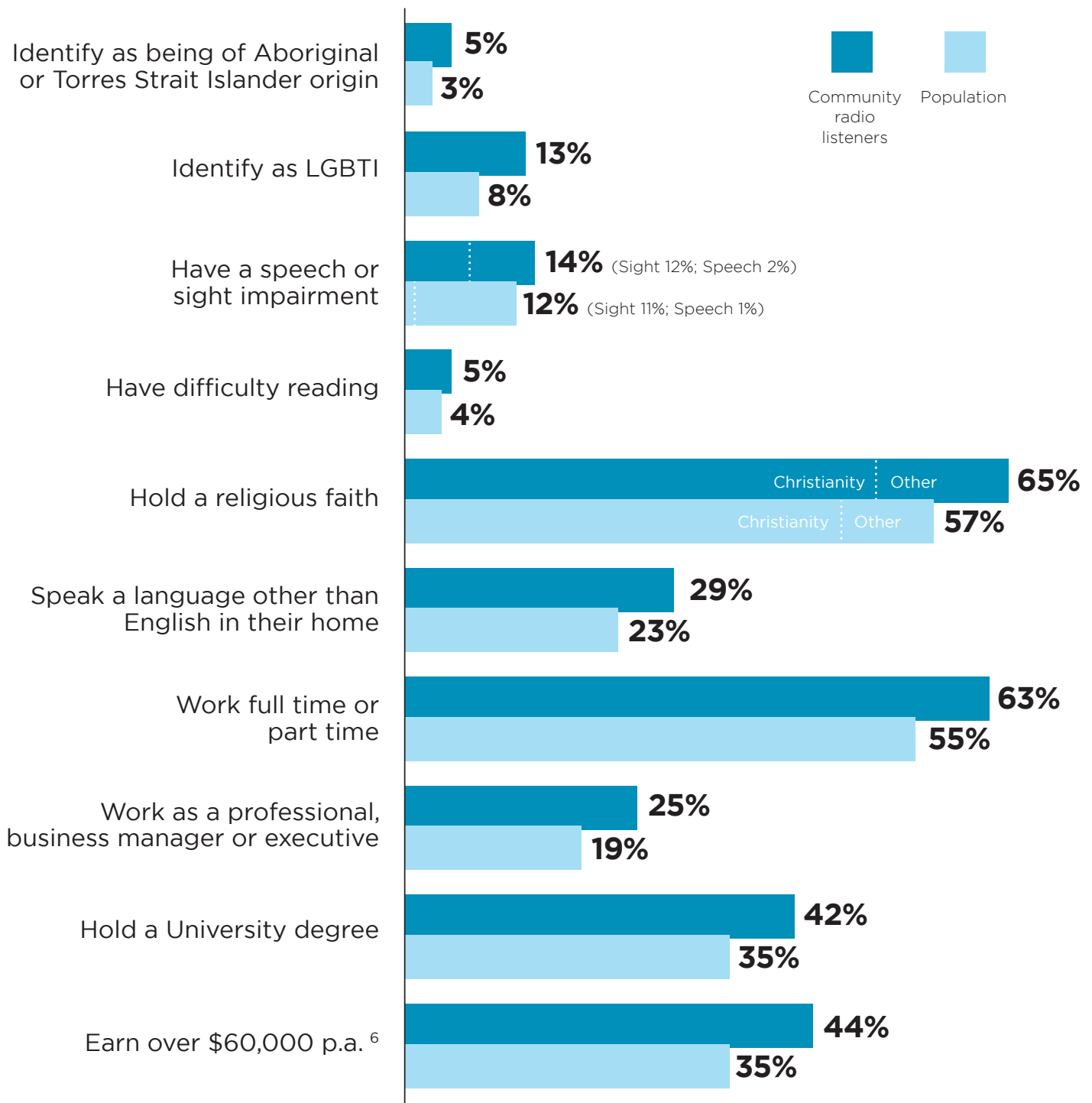
## Weekly listeners to community radio by State/Territory:



## The community radio listening audience is:



## Community radio listeners are more likely to:

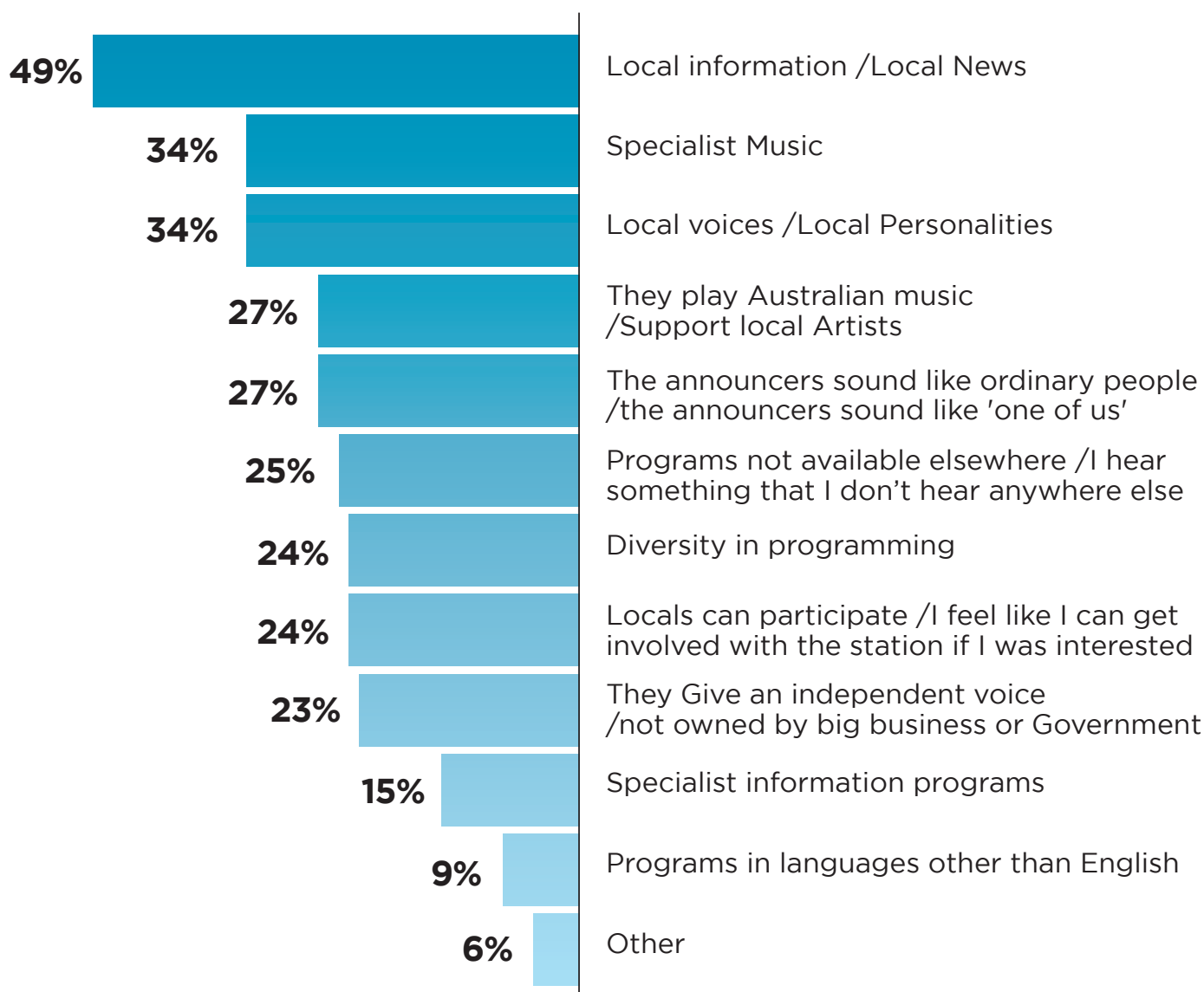


# WHY PEOPLE LISTEN

Community radio offers Australians access to a unique range of services and programs that support a diversity of voices, provide opportunities to contribute to and reflect an Australian identity and support effective participation in society.

Its value as a diverse, independent and local source of information, entertainment and music is clear when listeners are asked to share their top reasons for tuning in. Local information and news is the top reason that people listen, regardless of their age, location, or how long or at what time of day they listen <sup>7</sup>.

## Top Reasons for Listening to Community Radio:



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## Connection

One of the vital roles that community radio plays is to help people not feel socially isolated. Community radio facilitates participation and connects people together by providing the opportunity for people to engage in a meaningful way, with other like-minded individuals. Since community radio brings listeners, volunteers and contributors together, it can, in a very significant way, help to alleviate feelings of social isolation and loneliness.

The fact that community radio often encourages listeners to participate and be active (e.g. by attending a community event or by becoming a supporter of the station) is not insignificant in that it is a call to mobilise some people, to actively engage with a part of their community. This, together with the very critical and central role that volunteers play in the operations and delivery of community radio services, means that community radio can be a very powerful facilitator for mitigating loneliness for some Australians who engage with and participate in their local community radio station <sup>8</sup>.

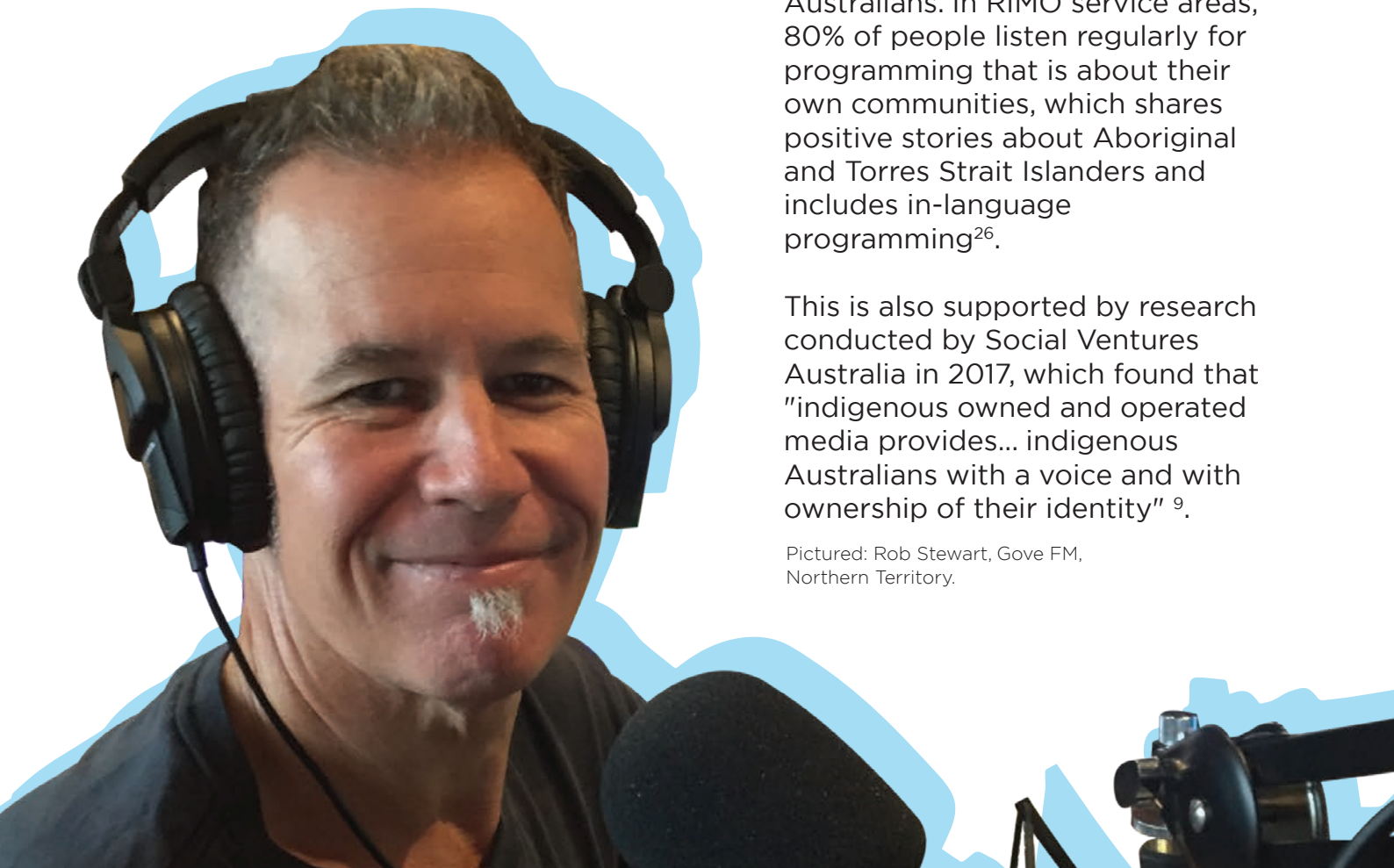
## Identity

Community radio provides more than information or entertainment for its audiences.

For example, Remote Indigenous Media Organisations (RIMO) are heavily relied upon by First Nations Australians. In RIMO service areas, 80% of people listen regularly for programming that is about their own communities, which shares positive stories about Aboriginal and Torres Strait Islanders and includes in-language programming<sup>26</sup>.

This is also supported by research conducted by Social Ventures Australia in 2017, which found that "indigenous owned and operated media provides... indigenous Australians with a voice and with ownership of their identity" <sup>9</sup>.

Pictured: Rob Stewart, Gove FM, Northern Territory.





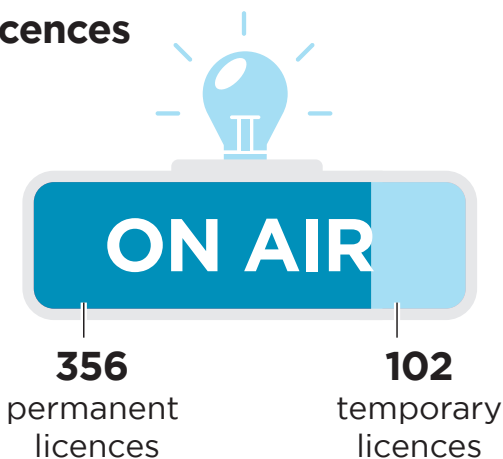
# ABOUT COMMUNITY RADIO STATIONS

Listenership is not the only measure by which the community broadcasting sector is larger than ever. There is also the highest number of community radio stations on record, with 450+ community owned and operated services broadcasting nationally.

## What makes a station ‘community’?

Community broadcasters are licensed under the Broadcasting Services Act 1992 (‘the Act’) and regulated by the Australian Communications and Media Authority (ACMA). Licence applications and renewals are merit-based and assessed on the basis of an organisation’s not-for-profit status and its capacity to meet the needs and interests of the community that station serves. Their communities of interest cover general geographic areas, as well as stations servicing:

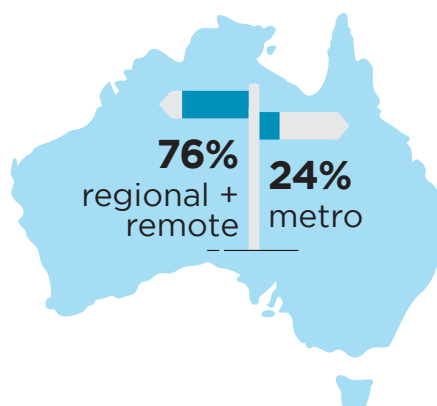
### 450+ total licences



- **First Nations**  
(Indigenous)
- **Culturally and linguistically diverse**  
(ethnic)
- **Religious**
- **Educational**
- **LGBTIQIA+**
- **Print disability**  
(Reading for the Print Handicapped (RPH))
- **Youth**
- **Seniors**
- **Specialist Music communities**

Community broadcasting is built on core guiding principles which unite all community broadcasters and illustrate the value of their services to Australian communities:

- Promote harmony and diversity, and contribute to an inclusive, cohesive and culturally diverse Australian community
- Pursue principles of democracy, access and equity, especially for people and issues not adequately represented in other media
- Enhance the diversity of programming choices available to the public and present programs that expand the variety of viewpoint broadcast in Australia
- Demonstrate independence in programming as well as in editorial and management decisions
- Support and develop local arts and music
- Increase community involvement in broadcasting



Stations may hold a temporary or permanent community broadcasting licence. As at September 2018, there were 356 permanent licences and 102 temporary licences, so a total of 458 community radio services broadcasting across the country. 24% are located in metropolitan areas and 76% are in regional and remote Australia<sup>10</sup>.

# ON AIR

Community radio makes important contributions to media diversity and local content production through a unique range of services and programs. It builds cultural infrastructure and intersects with other sectors like community services, social support, education, music and cultural development.

The majority of content broadcast on community radio is locally produced and **70% of content locally produced is broadcast live.**

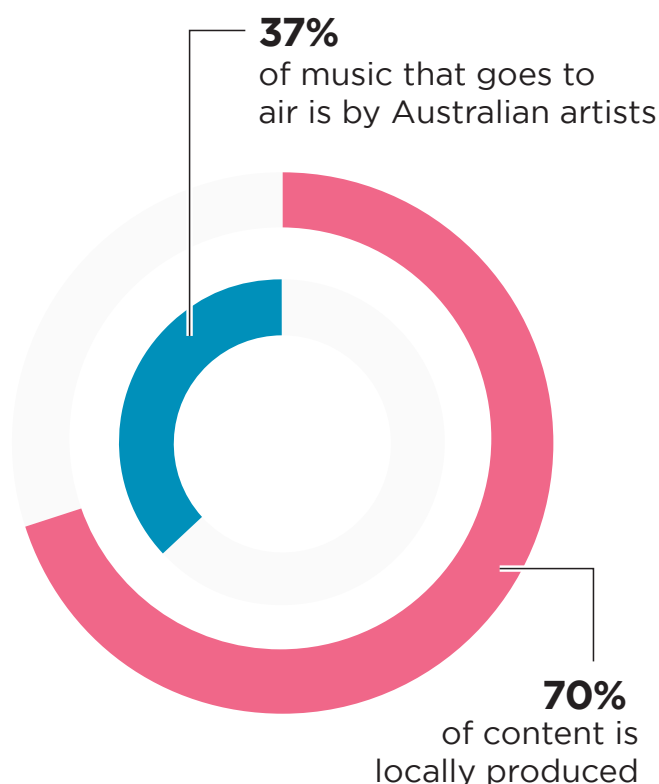
8 in 10 hours is dedicated to music programming and **37% of music that goes to air is by Australian artists.** This significantly exceeds legislated requirements (25% for all community broadcasters except Fine Music and Ethnic broadcasters (10%)).

Community radio stations play an important role in capturing Australian live music performances for broadcast, recording 45,000+ hours in a year.

15% of community radio programming is specialised, covering indigenous, religious and ethnic programming, as well as radio for Australians with a print disability.

Stations are active in their communities, conducting **3,000 outside broadcasts each year.**

Stations also continue to diversify their content production, with increases in the amount of audio shared for podcast or online listening, as well as video content <sup>11</sup>.



**2,400 hours of new video content uploaded by stations in the last 12 months.**



**34 hours of audio uploaded for podcast / online listening per week.**

# PEOPLE POWER

The community radio sector is powered by the efforts and dedication of over 26,000 volunteers. Over half of stations are entirely volunteer run. 17% of volunteers are under 26 years of age.



## Matoc Achol

In 2002, Matoc Achol (pictured) arrived in Australia, having left South Sudan as a result of the civil war. Matoc began broadcasting with 3ZZZ in 2010 and quickly breathed new life into the Sudanese program. He is an incredibly active and well respected member of the community, and through his standing, he has been able to bring to 3ZZZ a myriad of notable people into his program to talk about the issues that surround the Sudanese community including Victorian Police Chief Commissioner and Deputy Chief Commissioner and Greens MP Adam Bandt. In 2018, Matoc won the CBAA's Outstanding Volunteer Contribution award.

## Nadia Zahr

Nadia Zahr has been involved in community broadcasting for almost seven years and has held a variety of roles at Sydney's Muslim Community Radio station 2MFM. Joining while studying at Macquarie University, she has become one of the station's youngest and most influential radio hosts and producers. She produces and presents her own radio program Community Connect and through her community work on and off air, she has facilitated a space where minority communities feel comfortable to spread their message and express themselves in a society in which their perspectives are often marginalized, stereotyped or ignored.

## John Pederson

A stalwart of Adelaide music radio 5MBS, John Pederson has served the station and the community in a variety of ways over the full 26 years of its existence, as presenter, leader, promoter, musical expert and innovator, all in a voluntary capacity. John has provided valuable mentorship and training to many a new volunteer presenter, generously sharing his extensive experience, and attracting and encouraging new community volunteers to participate in the station. Pederson has also been an active member of the station's board for several years.

The sector also relies on the station supporters - members and subscribers - who contribute financially to the station. Overall, member and subscriber numbers have increased over the last decade, to an average of 598 per station. However, while average numbers increased in metropolitan and rural stations, they have decreased in their suburban and regional counterparts<sup>12</sup>.

# SKILLS DEVELOPMENT

The community broadcasting sector plays an important role in providing skills development and training opportunities across a range of topic areas relevant to broadcasting. This includes accredited and non-accredited training, in-station training opportunities, as well as conferences, partnerships, mentorships and scholarships.

As the peak training body for community broadcasters around Australia, the Community Media Training Organisation (CMTO) delivered face-to-face training to nearly 500 volunteers at 47 stations in 2017/18. In addition, CMTO undertakes online training supporting the CBAA's webinar program, which served over 800 community broadcasters in the same year<sup>13</sup>.

Community broadcasting's sector representative organisations host and participate in capacity building events throughout the year including: CBAA Conference, NEMBC Conference, CONVERGE (First Nations Media Australia), CONNECT (Christian Media & Arts Alliance), AMARC Conference (international community broadcasting association events held in Thailand and Indonesia in 2018).

Stations also undertake their own training programs and opportunities. Two examples are outlined below:



## 3CR Community Radio

In October 2017, Melbourne's 3CR and the Abolitionist and Transformative Justice Centre (ATJC) worked together to run a media project inside the Parkville and Malmsbury youth detention centres.

Station volunteers worked with up to 15 young participants using portable recording equipment to record interviews, songs and stories, and to teach them radio program design and presentation. Participants interviewed each other about family and friends, sport, school, music, sleeping rough and couch surfing, the feeling of being institutionalised, being paroled to homelessness, experiencing family violence, and having to steal to survive. In addition to developing radio-making skills, both participants and trainers were challenged to think differently and be open about their experiences and the experiences of others.



# 4ZZZ

Women On The Edge was 4ZZZ's training project to help balance gender bias at the station, and to empower women who may not be able to access community radio training and volunteering by usual pathways. 12-16 women attended 15 weeks from September - December 2017. The project culminated in a Listening Party in December and radio series released in March 2018. Participants received an accessible and well-rounded introduction to making radio that was very hands-on and fun.

It also aimed to overcome some challenges related to regular volunteering and training, such as mental health, learning problems, disability or having responsibility for small children. The program included a free induction and access to recording studios at The Edge, training support from the Community Media Training Organisation, tours of 4ZZZ and 4EB and a session with the Community Broadcasting Foundation.



Research indicates that the highest needs for training are in interviewing, podcasting, outside broadcasting, strategic planning, compliance and governance. There is ongoing interest in accredited training in the sector and growing interest in online learning opportunities including webinars and via social media (e.g. Facebook Live)<sup>14</sup>.

# TECHNOLOGY

Community broadcasters share content and connect with their communities through a mix of AM/FM, DAB+ digital broadcasting and online. They also use technical infrastructure to exchange content for broadcast.

## Transmission

The majority of stations leader their transmission facilities from a commercial provider **(39%)** or from local government **(21%)**



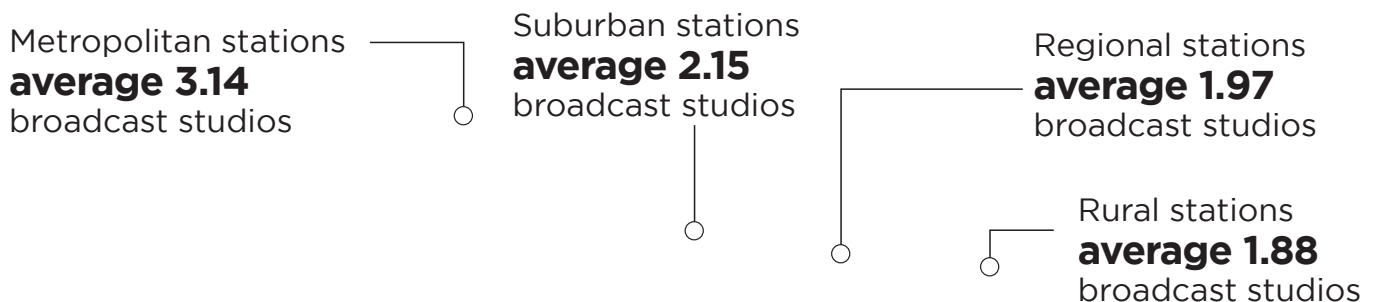
**15%** of stations own their transmission site/facilities

while another **4%** are part of a consortium of stations sharing the site

Almost half of stations use an analogue radio link to connect to their transmission site. The next most common method is via an ACMA licensed digital radio link.

## Studios and Production

All stations have at least one broadcast-capable studio, and over three-quarters have least least two broadcast capable studios.



As well as this, two thirds of stations have production-only studios and 13% have training-only studios. Most stations (79%) also have outside broadcasting facilities<sup>15</sup>.

## DAB+ Digital Radio

**38%** of Australian radio listeners are now tuning in on digital platforms with 27% listening to DAB+ digital radio broadcasting averaging 11.3 hours per week and 11% online and mobile listening averaging 5.5 hours per week<sup>16</sup>.



**27%** listening to DAB+ digital radio broadcasting averaging 11.3 hours per week



**11%** online and mobile listening averaging 5.5 hours per week<sup>16</sup>.

There are currently 40+ community digital radio services operated by 36 community radio licensees across Melbourne, Sydney, Brisbane, Adelaide and Perth. Community digital radio services are also scheduled to commence in Canberra, Darwin and Hobart in 2019 as digital radio begins to expand to regional areas, and other locations are under industry planning considerations.



**40+**  
community  
digital radio  
services.

Community radio listeners continue to experience the benefits of DAB+ broadcast technology, including access to special event and seasonal short-term services in addition to regular broadcasting across the CBAA's digital radio network.

## Content Exchange

Community radio stations supply locally produced content to different recipients or services, including community-sector based services like the CBAA's Community Radio Network or National Indigenous Radio Service (NIRS), as well as to other community radio stations as well as other media organisations, government, not-for-profit and commercial organisations. 45% of stations have systems in place to exchange programs with other stations, including exchanging audio in real time during live broadcasts as well as capturing files for later use. For example, 33% of metropolitan stations provide content to other individual stations, as do 12% of regional and 17% of rural and remote stations<sup>17</sup>.

## Online

Almost all (96%) of stations operate a website. Stations use their websites to publish program guides (94%), live simulcast and audio streaming (85%), podcasting their content (32%), promote sponsors (80%), collect listener feedback (55%), share music playlists (28%), process payments (38%) and more<sup>18</sup>.

# FINANCIAL SUSTAINABILITY

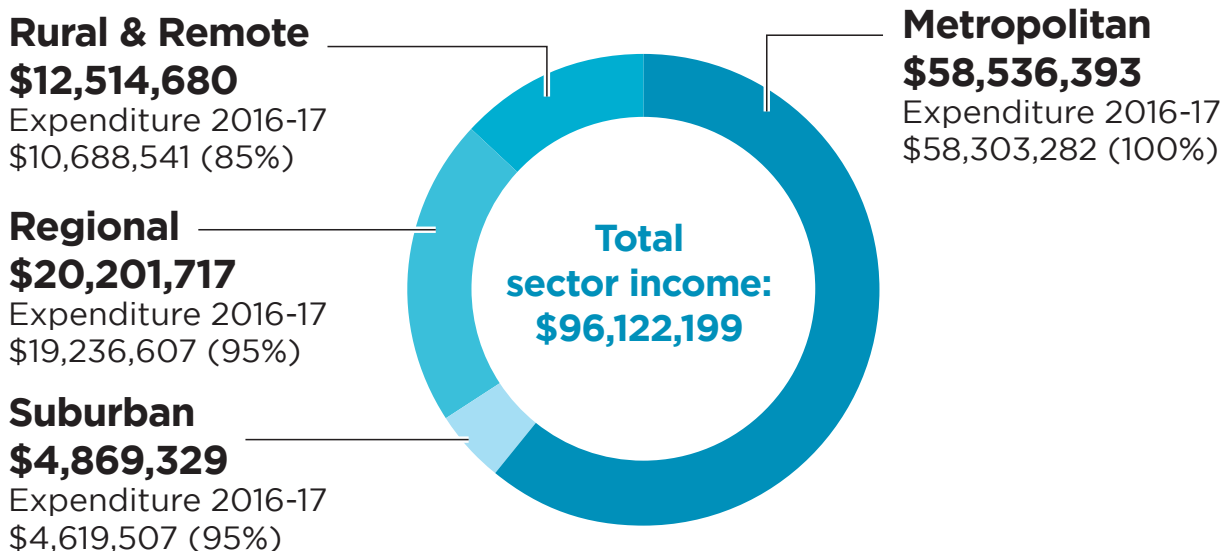
The community broadcasting sector consists of not-for-profit, organisations, most of which are community owned. While income and expenditure values vary significantly across the sector, stations of all sizes, locations and communities of interest identify financial sustainability as their top challenge<sup>19</sup>.

## Sector Income

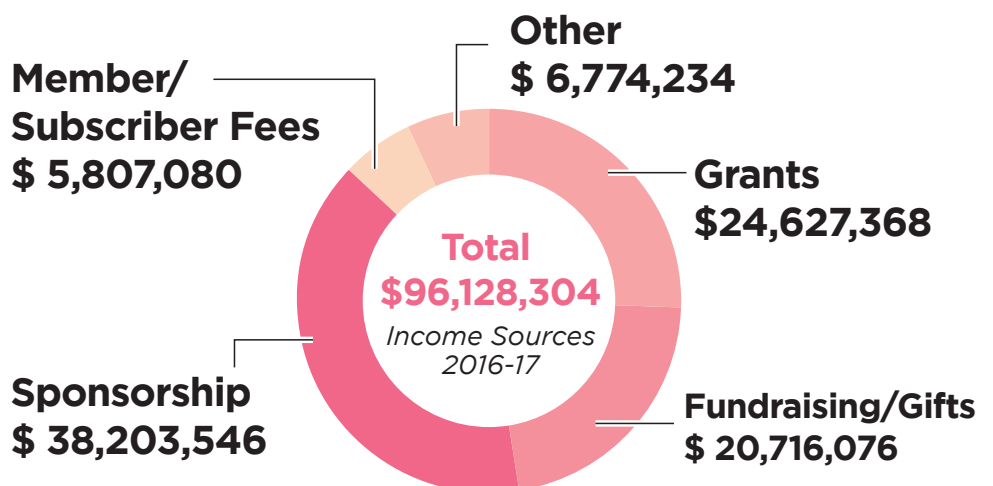
Total income for the community broadcasting sector in 2016/17 was \$96,122,119<sup>20</sup>.

The sector is largely independently funded, with three quarters of total revenue generation through fundraising, sponsorship, member and subscription fees (and other sources of income including access fees, training fees and production fees). The remaining quarter of the sector's total funding is via grants, including Federal, State and local government grants, philanthropic organisations and educational institutions.

### Sector Income by Station Location:



### Proportion of Income by Source:



*Sponsorship + Fundraising + Memberships 74%*



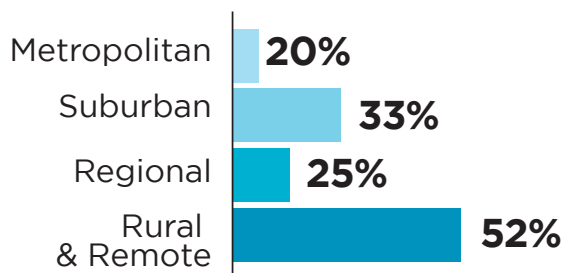
## Income percentages by Community of Interest

Income 2016-17	Category	Expenditure 2016-17
(100%) <b>\$96,122,199</b>	Total	<b>\$ 92,847,799</b> (97%)
(11%) <b>\$10,408,499</b>	Educational	<b>\$10,215,308</b> (98%)
(3%) <b>\$3,035,571</b>	Ethnic	<b>\$3,194,762</b> (105%)
(3%) <b>\$2,802,782</b>	Fine Music	<b>\$3,096,188</b> (110%)
(25%) <b>\$23,903,338</b>	General	<b>\$21,415,376</b> (90%)
(17%) <b>\$16,407,793</b>	Indigenous	<b>\$14,779,677</b> (90%)
(3%) <b>\$2,460,419</b>	RPH	<b>\$3,492,459</b> (142%)
(31%) <b>\$29,448,444</b>	Religious	<b>\$28,888,324</b> (98%)
(3%) <b>\$2,942,355</b>	Seniors	<b>\$2,918,761</b> (99%)
(5%) <b>\$4,712,918</b>	Youth	<b>\$4,846,945</b> (103%)

## Percentage of grant Income vs total Income:

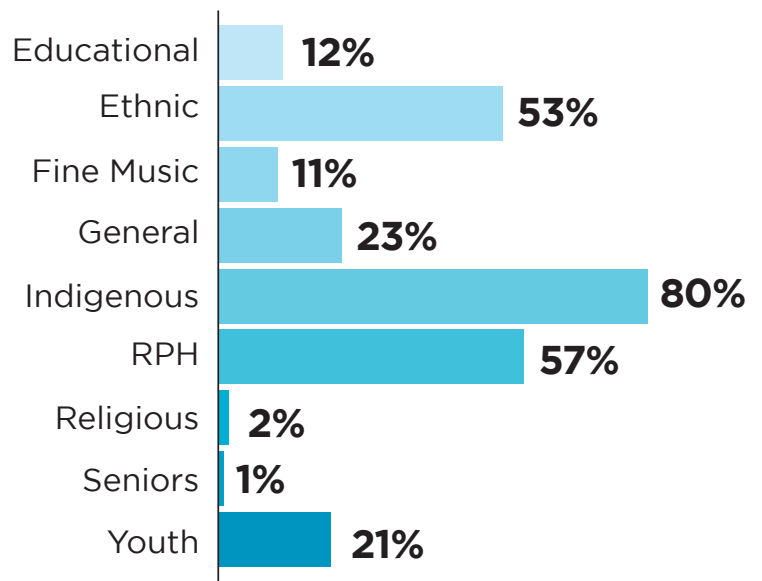
### By Station Location:

Grants as % of total station income



### By Station Community of Interest:

Grants as % of total station income



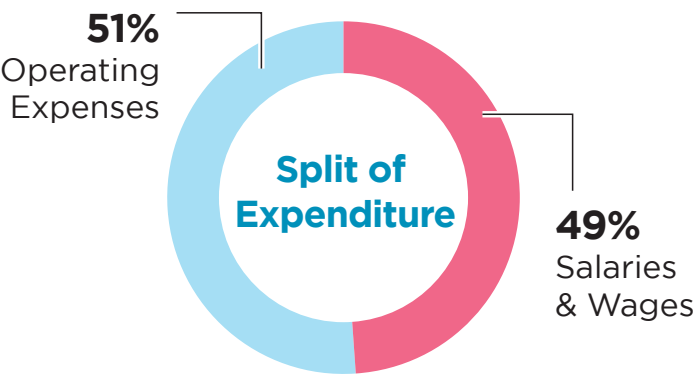
# Sector Expenditure

The total sector expenditure for 2016/17 was **\$92,947,799**, which is 97% of sector income <sup>22</sup>.

Analysis of station finances shows a split of expenditure between salaries and wages, and operating expenses. Operating expenses include copyright licence fees, transmission site expenses and general station operating expenses.

Expenditure varies similarly to income across the sector, dependent on station size, location and community of interest.

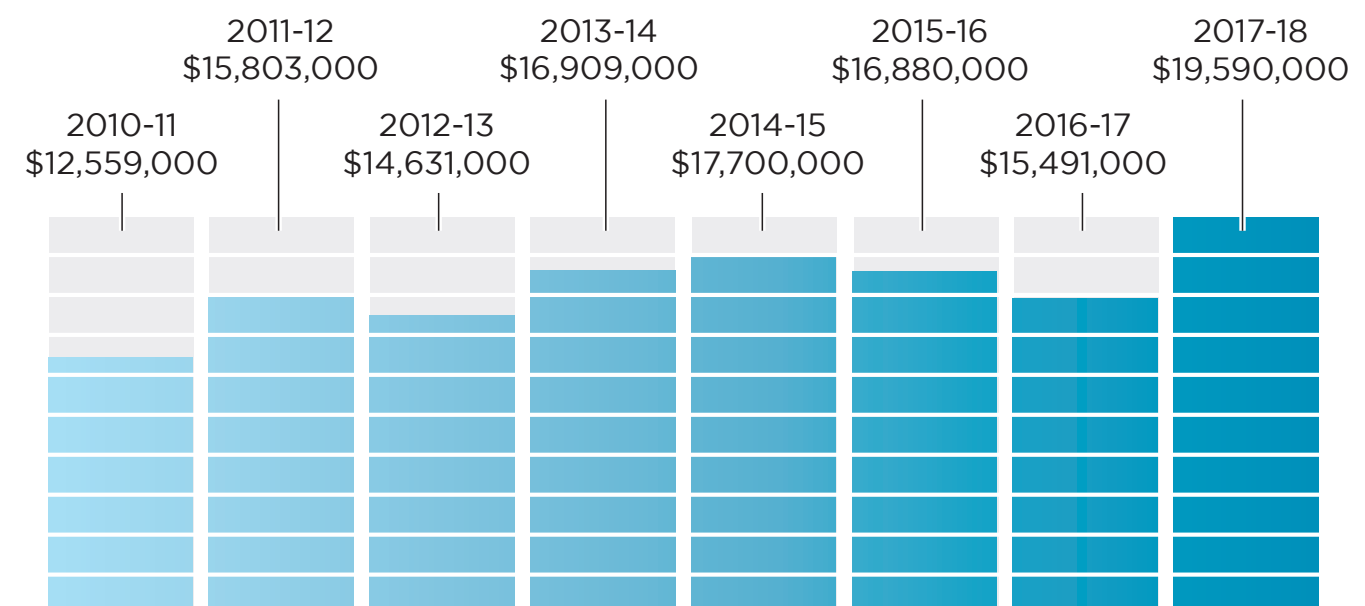
Metropolitan stations tend to spend the most on salaries & wages (55% to total expenditure), while Suburban stations spend the least (just 18%). Based on community of interest, educational and religious stations spend most on salaries and wages, while for general stations, over two-thirds of their expenditure is on other operating expenses <sup>23</sup>.



## Federal Government Funding Support

The community broadcasting sector has received Federal Government Budget funding through the Community Broadcasting Program and the Indigenous Broadcasting Program for several decades. There has been ongoing bi-partisan support and the Community Broadcasting Program funding pool has increased by 55% since 2010/11. In 2017/18, the sector received additional targeted funds for the rollout of digital radio, capacity and skills development, improved news content delivery, and improved online presence. Funding from the Department of Communications is distributed to the sector via the Community Broadcasting Foundation (CBF)'s grants program.

### Federal Government Funding through the Community Broadcasting Program



# DEFINITIONS

## Geographical Area

<b>Metropolitan</b>	Stations located in a state or territory capital city and licensed to broadcast metropolitan wide.
<b>Suburban</b>	Stations located in a state or territory capital city and licensed to broadcast to a particular suburban (or sub-metropolitan) area.
<b>Regional</b>	Stations not located in a state or territory capital city, but based in a centre with a relatively high level of service provision (i.e. access to health, education and other public services and a range of commercial outlets) or is within 100 kilometres of such a centre.
<b>Rural and Remote</b>	Stations located in a country area or town centre in a country area, which has a comparatively low level of service provision (i.e. access to health, education and other public services and a range of commercial outlets) and not within 100 kilometres of a centre which has a high level of service provision.

## Community of Interest

<b>Educational</b>	Stations associated with educational communities, mostly with an historical association with an university.
<b>Ethnic</b>	Stations broadcasting multilingual and multicultural programming.
<b>Fine Music</b>	Specialist music stations predominantly playing classical, jazz and new Australian compositions.
<b>Indigenous</b>	Stations primarily operated by and servicing Aboriginal and Torres Strait Islander people, including Indigenous music as well as discussion of Indigenous issues and culture - and stations servicing remote Aboriginal communities in Australia.
<b>RPH</b>	RPH radio services broadcast published print information in an alternate format (audio) for people in Australia with a print disability.
<b>Religious</b>	Stations that adopt a single faith as a guiding principle in their programming and purpose.
<b>Seniors</b>	Stations that broadcast primarily for older Australians, often including an emphasis on music from the 1940s to 1960s.
<b>Youth</b>	Stations providing content primarily for young Australians, independent and unpublished music and community information and relevant discussion for youth.

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23. Community Broadcasting Association of Australia (2018), Financial Health of Community Radio (internal), conducted by Survey Matters.
24. Provided by Community Broadcasting Foundation and based on sum of station income + Community Broadcasting Foundation + Sector Representative Organisations + Community Television sector income.
25. Based on the approach taken in Culture, Commitment, Community, Forde, Meadows, Foxwell, Griffith University 2002 at p.28) where total number of volunteers: Radio – 26,700 (community radio) + 4,453 (community television (ACTA)). Total: 31,153 x average volunteer hours per week: 10 (median weekly volunteer contribution) x estimated weeks per year: 48 x hourly value of work based on Austats 6302.0 Full-time adult average weekly ordinary earnings – November 2017: \$1,567.90, assuming a standard 38 hour week = \$41.26 per hour. 31,153 volunteers x 10 volunteer work hours per week x 48 weeks = 14,953,440 estimated volunteer hours contributed in 2016-17 at \$41.26 per hour = \$616,978,934.
26. Indigenous Remote Communications Association (2016), Remote Indigenous Communications and Media Survey, retrieved from <https://firstnationsmedia.org.au/projects/indigenous-communications-and-media-survey-2016>





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