survey matters.

COMMUNITY BROADCASTING SECTOR
2018 PROGRAMMING AND TECHNOLOGY SURVEY

Prepared by Survey Matters
December 2018

CBAA

COMMUNITY
BROADCASTING
ASSOCIATION OF
AUSTRALIA

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ABOUT THIS REPORT

The Community Broadcasting Station Census is a comprehensive research project that collects information and reports on the activities of stations in the Australian community radio sector.

The Community Broadcasting Association of Australia (CBAA) has been collecting census information since 2003. This latest census report covers the 2016/2017 financial year and is the ninth data collection.

In prior years, a single census provided a snapshot of the community radio sector covering programming, program sources, finances, staffing, volunteers, subscribers, sponsorship, training and technology. In an effort to reduce the time required for stations to complete the census, the CBAA decided to split future census data collection projects over several separate surveys.

This census survey focused on Programming and Technology, providing information about the extent and range of community radio programming that is broadcast to specific segments of the community. It also covers the technical capability of the sector.

In order to preserve the confidentiality of contributing stations, the survey has been conducted by Survey Matters – an agency specialising in research for not for profit and member based organisations. Results are provided in aggregate form only. Survey Matters is a member of the Australian Market and Social Research Society (AMSRS) and is bound by the AMSRS Code of Professional Behaviour and the Australian Privacy Principles in the Privacy Act 1988. The data provided by stations is held as strictly confidential. No station is identified in the survey results in any way.

METHODOLOGY

Survey Distribution

The Community Broadcasting Station Census Survey was fielded between 12 June and 5 August 2018.

The survey was distributed via an email, inviting stations to complete an online survey. Invitations containing unique survey links were sent to the station managers or appropriate contacts at 338 long term and temporary licensed community radio stations on 12 June 2018, representing all community radio stations besides Remote Indigenous Broadcasting Services.

Six reminder emails were sent to respondents who had not completed the survey. Several follow up telephone calls were also made to stations who had not responded.

The survey questionnaire was designed by the CBAA, in conjunction with Survey Matters. Most questions remain the same as the last survey wave, allowing direct comparison to the 2015-2016 year. Many questions have been retained since the inception of the program, allowing tracking of data since 2002

Results and Analysis

Representatives from 156 stations responded to the survey, from the distribution of 336 stations. This represents a 46% response rate. This is slightly lower than the response rate in 2016, which was 50%.

Live data verifications and reconciliation checks within the online survey ensured that all completed online responses to the survey contained consistent data.

Responses received closely reflect the composition of the sector by the service area, or location, within which stations operate. When responses were reviewed by community interest, however, there were some categories where a lower number of responses than required for accurate sector representation were received. Before analysing the results, data has been weighted to reflect the composition of the sector by both station location and category/community of interest.

Results were compiled in Survey Manager Panel software, and results were analysed in Marketsight statistical software. Overall results after the weighting can be taken to provide accurate representation of the sector overall. Projections have been made to weight the survey data to total sector results.

Where applicable, results are also presented in this report to show differences in station broadcasting based on the station's location or category/community interest. Results for segments with small sample sizes should be treated with care.

Full data tables providing results for each question by station location and category/community interest are provided in Appendix A.

Comparisons to prior survey waves are provided where questions remain consistent.

This report has been prepared for the internal use of the Community Broadcasting Association of Australia (CBAA).

SAMPLE

The number of community radio stations included in the station census decreased slightly from 342 in 2015-2016 to 336 in 2016-2017. This includes 287 fully licensed community radio stations as well as 49 temporary licensed (TCBL) stations.

Included in the sample are 55 metropolitan stations, 44 suburban stations, 161 regional stations and 76 operating in rural and remote areas.

Licensed Community Broadcasting Stations, 2007 - 2017

Legend: 2007-2008 | 2009-2010 | 2011-2012 | 2015-2016 | 2016-2017
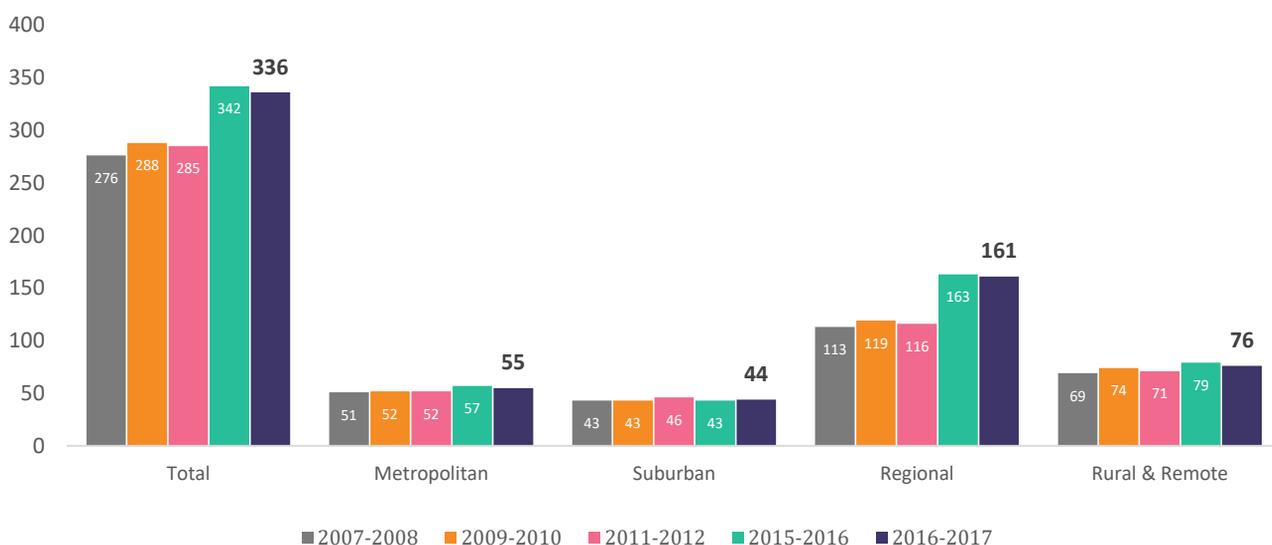
Sample Statistics

Representatives from 156 stations responded to the survey, from the distribution to 336 stations. Before analysing the results, data has been weighted to reflect the composition of the sector by both station location and category/community interest, as outlined in the table below.

Please note that due to the size of the sector, the overall sample for this study is relatively small and some segments contain very small samples. As sample composition can significantly affect reported values and impact reliability, data provided for the various station segments should be treated with care.

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Population	336	55	44	161	76
No. of stations who provided data	156	44	19	64	29
Weighted Base	156	26	20	75	35
Response Rate	46%	80%	43%	40%	38%

	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
Population	7	6	3	217	32	12	38	12	9
No. of stations who provided data	5	4	3	96	9	10	19	7	3
Weighted Base	3	3	1	101	15	6	18	6	4
Response Rate	71%	67%	100%	44%	28%	83%	50%	58%	33%

SUMMARY FINDINGS

KEY FINDINGS

PROGRAMMING

- Overall, community radio stations broadcast 55,812 hours each week, down from 57,287 in 2015-2016.

- While the majority of airtime (36,004 hours) remains locally produced content, the proportion of local content fell significantly to 65% in 2016-2017.

- A majority (70%) of local content broadcast by community radio stations is presented live, up from 62% in 2015-2016.

- Of the various services stations use to access external audio content, the Community Radio Network (CRN) is the most widely used.

- The proportion of airtime dedicated to music increased in 2016-2017. Nationally, 8 out of 10 hours (79%) of airtime in 2016-2017 was music programming.

- Up from 2015-2016, 37% of music broadcast by community radio stations each week is Australian music.

- Overall, the sector broadcasts 11, 624 hours of spoken word programs each week. The proportion of locally produced spoken word content has fallen from 67% in 2015-2016 to 62% in 2016-2017.

- Metropolitan stations continue to dedicate a greater proportion of their airtime to spoken word programs.

- Indigenous programming continues to increase, with stations broadcasting 2,467 hours per week in 2016-2017.

- While lower than in 2015-2016, more hours continue to be devoted to religious programming than any other specialist program (2,858 hours per week).

- Slightly down from 2015-2016, 1,829 hours of ethnic programming was broadcast on community radio each week in 2016-2017.

- A total of 1,436 hours of radio for Australians with a print disability was broadcast each week during 2016-2017.

- Community radio stations uploaded an average of 34 hours of audio to online platforms for podcast/online listening each week in 2016-2017, up from 24 hours in 2015-2016.

- New video content is also being produced by stations, with 2,400 hours uploaded to online platforms by stations over the last 12 months.

- Stations produced 62,139 hours of online only content for listeners over the last 12 months, up 91% from 2015-2016.

- Like in 2015-2016, approximately 3,000 outside broadcasts were conducted by stations nationally over the year.

- Over the last 12 months, community radio stations recorded over 45,000 hours of Australian music performance for broadcast.

KEY FINDINGS

TECHNOLOGY & INFRASTRUCTURE

- Ninety nine percent (99%) of stations have internet access, with the majority connecting via fixed ADSL, cable or fibre.

- Nearly two thirds (63%) of stations are fully networked, with 30% partially networked and 7% operating with stand alone computers.

- Website ownership has increased, with 96% of stations having an online presence in 2016-2017.

- Nearly all (94%) of stations publish a program guide online, up from 85% in 2015-2016.   Live simulcast audio streaming is another popular use for a stations website, with 85% of stations streaming audio live through their website.

- Promoting sponsors remains a common use for station websites, with 80% of stations providing an area for sponsor information on their website.

- The methods stations use to connect to their transmission site are relatively consistent with 2015-2016, Forty eight percent (48%) of stations use an analogue radio link. More stations are using an ACMA licensed digital radio link (23%) in 2016-2017.

- Approximately 40% of stations lease their transmission site from a commercial provider. Leasing from a local government is also relatively common (21%), particularly amongst suburban and regional stations.

- Over three quarters (79%) of stations have at least two broadcast capable studios, with an average of 2.16 broadcast capable studios (up from 2.13 in 2015-2016).

- Sixty six percent (66%) of stations with more than one broadcast capable studio have a production only studio and 13% have training only studios.

- A majority (79%) of stations have outside broadcasting facilities.

- Nearly all stations (93%) have a broadcast automation system, and system capabilities have improved.

- Forty five percent (45%) of stations have systems in place to exchange programs or program material with other stations, up from 41% in 2015-2016.   A large majority of these stations (98%) are capable of broadcast quality exchange. Eighty six percent (86%) use their system to capture files for later use while 40% use real time exchange of audio for live broadcast.

- Nearly half (49%) of all community radio stations indicate that they capture content from CRN or DDN.

- Consistent with 2015-2016, approximately a quarter (26%) of stations take the signal live to air from the satellite for immediate broadcast. Fifty three percent (53%) of subscribers replay the content automatically via scheduling software.

DETAILED FINDINGS
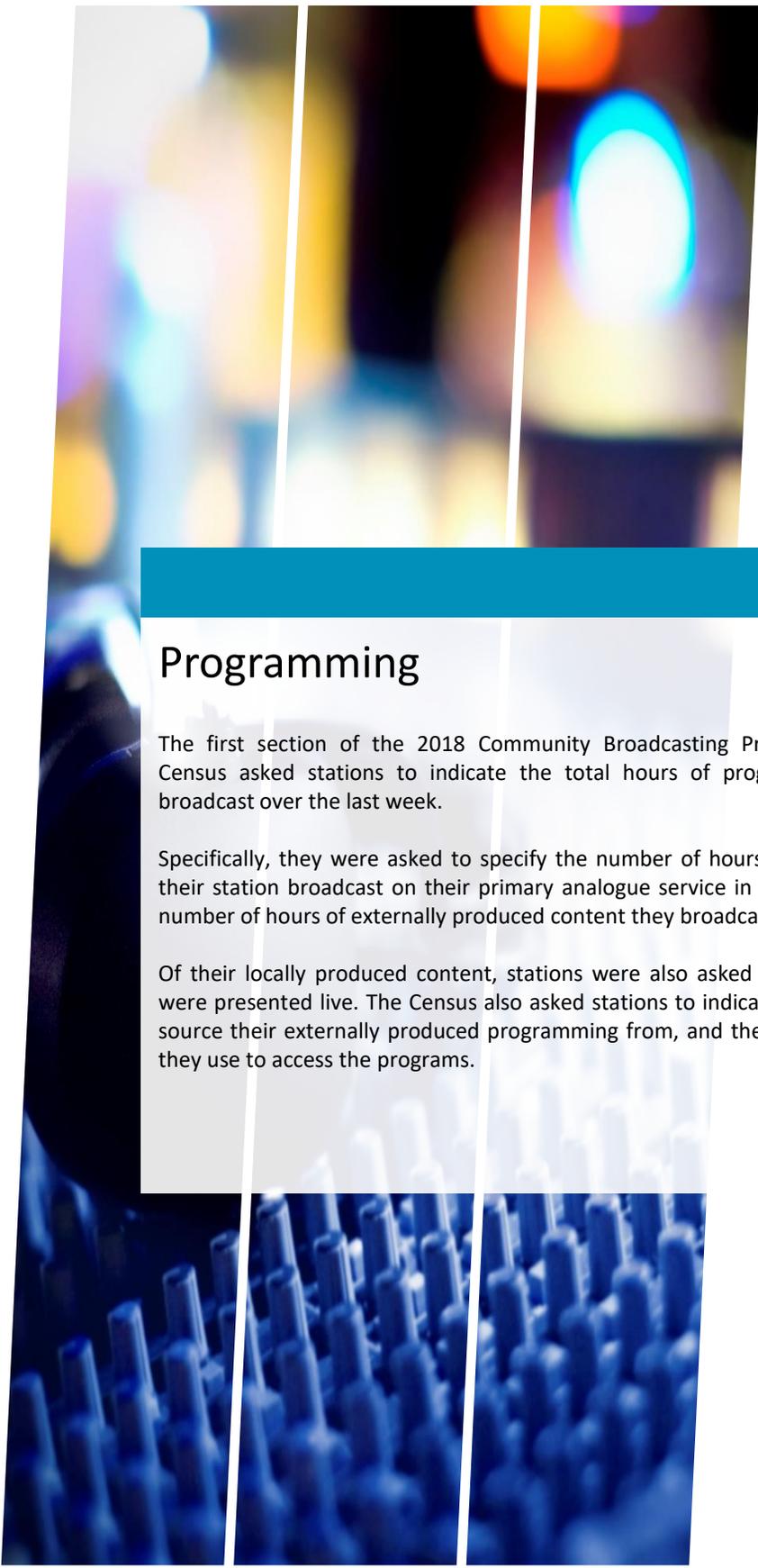
Programming

The first section of the 2018 Community Broadcasting Programming and Technology Census asked stations to indicate the total hours of programming that their station broadcast over the last week.

Specifically, they were asked to specify the number of hours of locally produced content their station broadcast on their primary analogue service in the last week, as well as the number of hours of externally produced content they broadcast over the same period.

Of their locally produced content, stations were also asked to indicate how many hours were presented live. The Census also asked stations to indicate which services they use to source their externally produced programming from, and the specific sources or methods they use to access the programs.

TOTAL BROADCAST HOURS

Overall, community radio stations broadcast 55,812 hours each week. This compares to 57,287 in 2015-2016, with the difference attributable to the lower number of community radio stations, as well as a couple of stations who were on air part-time.

Most community radio stations broadcast for 24 hours a day, 7 days a week – or 168 hours a week. The average for all stations in 2016-2017 was 166. This is lower than in 2015-2016, when the average was 167. Again, this is due to a couple of stations being on air for less than 168 hours.

Sources of Programming

While the majority of airtime (36,004 hours) remains locally produced content, the proportion of local content fell significantly to 65% in 2016-2017. As seen below, this compares to a long term average of approximately three quarters of all airtime being content produced locally by community radio stations.

Of the fall from 72% in 2016, 3% of the difference is due to actual differences amongst stations who reported in both 2016 and 2018. The remaining change can be explained by sample differences, with many new respondents reporting a low proportion of local content and many stations who reported high local content in 2016 not responding to the survey in 2018.

Programming Sources, 2002 -2017
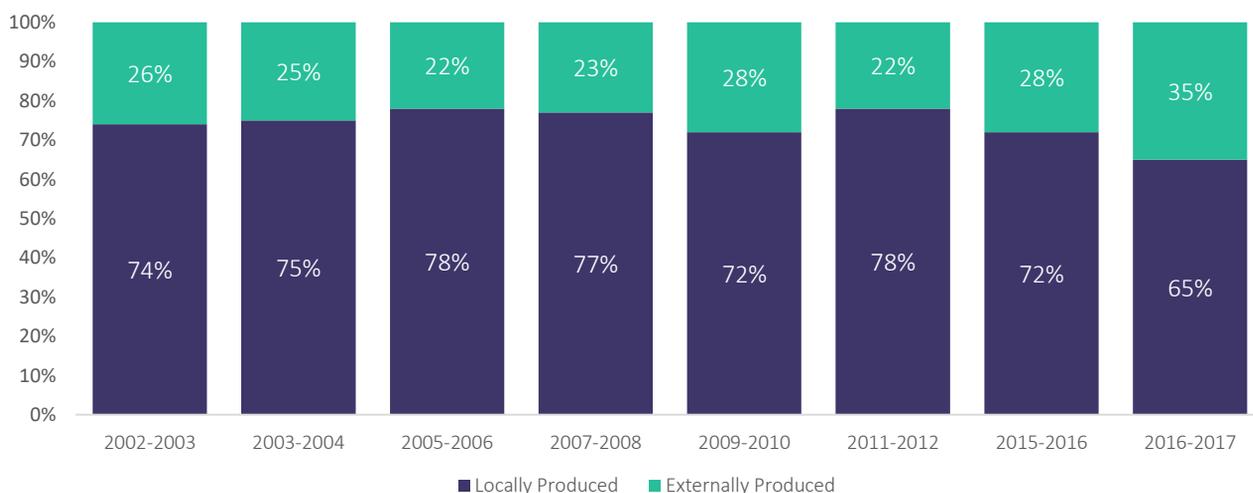
	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Total Broadcast Hours	55,812	9,230	7,167	26,652	12,763
Local Content	36,004	6,664	5,745	16,539	7,056
External Content	19,808	2,566	1,422	10,112	5,708

Q1. How many hours of Locally/Externally Produced Content did your station broadcast on your primary analogue service LAST WEEK?

LOCAL PROGRAMMING

Local programming is content produced by community radio stations and broadcast for the first time by presenters in local studios.

In 2018, 65% of all broadcast time was locally produced content, which equals 36,004 hours of locally produced content each week. This is down significantly from 2015-2016, when 72% of programming was locally produced. In 2011-2012, 78% of programming was locally produced.

The proportion of content derived from local sources was higher in metropolitan and suburban stations than it was in regional and rural and remote stations. Stations dedicated to fine music, educational and ethnic programming also tended to broadcast a higher proportion of locally produced content than other categories.

The decline in local content was most marked in suburban, and regional and remote stations. Similarly, educational, general, Indigenous and RPH stations also reported declining local content.

Locally Produced Content, % of Total Content, 2007 - 2017

Legend: 2007-2008 | 2009-2010 | 2011-2012 | 2015-2016 | 2016-2017
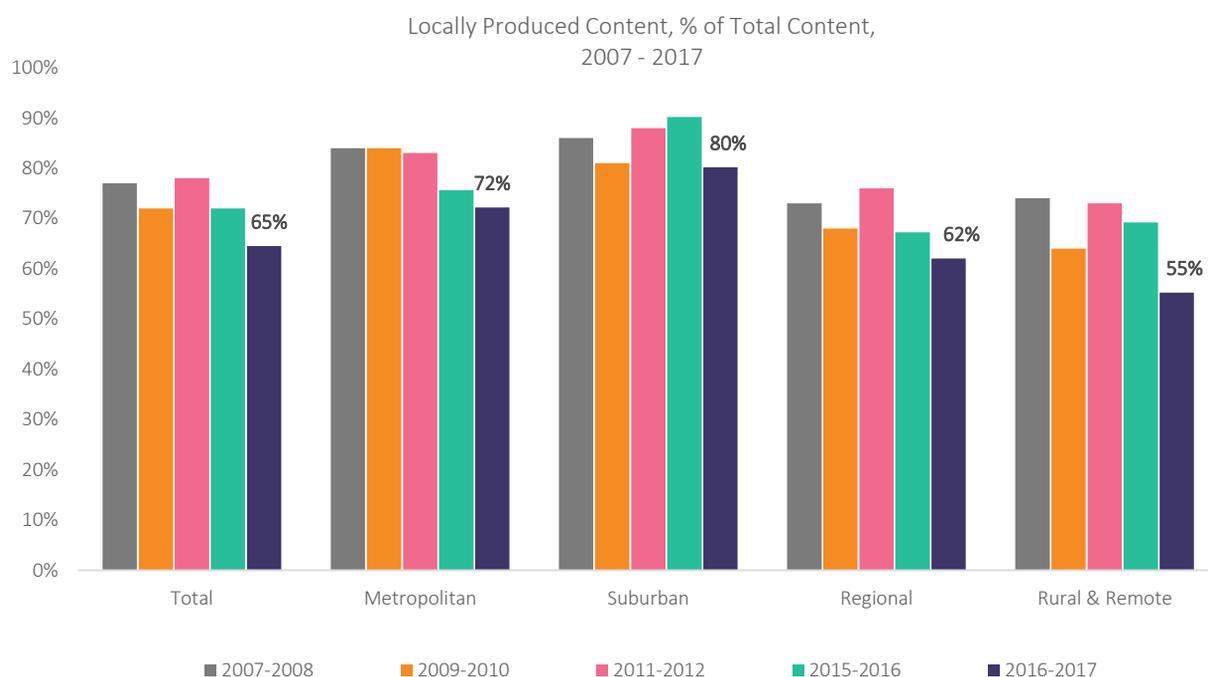
	Total	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
Sample	156	3	3	1	101	15	6	18	6	4
2016-2017	65%	87%	84%	97%	68%	67%	46%	37%	82%	61%
2015-2016	72%	100%	74%	98%	74%	90%	61%	43%	92%	46%
2011-2012	78%	93%	64%	97%	81%	74%	32%	76%	93%	98%
2009-2010	72%	93%	81%	97%	74%	65%	31%	63%	94%	97%
2007-2008	77%		81%	77%		79%	32%	73%	95%	97%
2005-2006	78%		82%	97%		75%	32%	92%	94%	97%
2003-2004	75%		82%	97%		63%	25%	85%	94%	98%
2002-2003	74%		82%	92%		64%	32%	84%	91%	95%

Q1: How many hours of LOCALLY PRODUCED CONTENT did your station broadcast on your primary analogue service LAST WEEK?

Live Local Programming

Of the locally produced content that is broadcast by community radio stations each week 70% is presented live, up from 62% in 2016.

Suburban stations present the most live content, with 82% of all locally produced content broadcast by suburban stations presented live. Metropolitan stations present 71%, regional stations 70%, and rural and remote stations 62% of their locally produced content live.

When viewed by community of interest, the proportion of local programming that is presented live is relatively consistent with 2016. Youth and educational stations largely broadcast their local content live (88%). General stations, which make up the vast majority of community radio stations, present 70% of their locally produced content live.

Religious (31%), Indigenous (33%) and RPH (38%) stations present the lowest proportion of locally produced content live.

% of Local Content Broadcast Live, 2015-2017
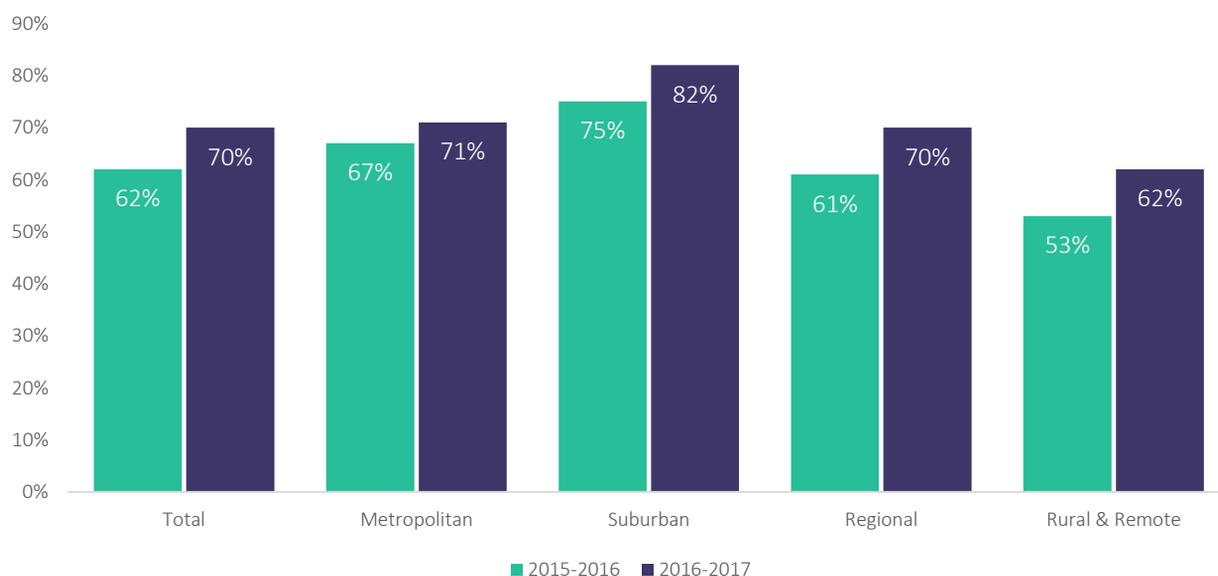
	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
Sample	3	3	1	101	15	6	18	6	4
2015-2016	88%	84%	76%	70%	33%	38%	31%	57%	88%
2016-2017	88%	63%	73%	78%	34%	47%	45%	55%	99%
Total Hours Live Local Content	896	531	358	19,009	1,236	431	1,043	922	915

Q2. Of that locally produced content, how many hours were presented live?

EXTERNAL PROGRAMMING

Many community radio stations also rely on a variety of external sources to enable them to remain on air for 168 hours a week.

Stations take almost a third of their external content from satellite sources. While there has been a slight fall, 26% of stations play live audio sourced via satellite (down from 32% in 2015-2016) while a further 4% play files downloaded from satellite. A further 24% use physical media and 21% of stations download files online. Nineteen percent (19%) rely on other, unspecified sources.

Regional, rural and remote stations rely the most heavily on externally produced content, using external sources for 38% and 45% respectively of their programming. This compares to 28% for metropolitan stations and 20% for suburban stations. All stations play approximately a quarter of their external content as live audio sourced via satellite. Suburban stations rely more heavily on physical media, sourcing 44% of their external content via physical media.

Religious and RPH stations rely on external content for a greater proportion of their programming than other stations, at 63% and 54% respectively.

Youth stations source 39% of their content from external sources, while general stations source approximately a third (32%) of their content externally.

Fine music, educational and ethnic stations rely on external sources for the lowest proportion of their programming, at 3%, 13% and 16% respectively.

External Content Sources, 2016-2017
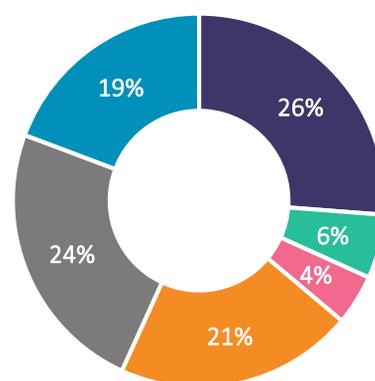
- Live Audio via Satellite
- Live Audio via Online
- Files via Satellite
- Files via Online
- Physical Media
- Other

	Total	Metropolitan	Suburban	Regional	Rural & Remote
External Content % Total Broadcast Hours	**35%**	**28%**	**20%**	**38%**	**45%**
Live Audio via Satellite	26%	28%	22%	28%	24%
Live Audio via Online	6%	5%	0%	4%	10%
Files via Satellite	4%	6%	0%	5%	4%
Files via Online	21%	27%	9%	20%	21%
Physical Media	24%	9%	44%	26%	21%
Other	19%	26%	25%	17%	19%

	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
External Content % Total Broadcast Hours	**13%**	**16%**	**3%**	**32%**	**33%**	**54%**	**63%**	**17%**	**39%**
Live Audio via Satellite	0%	62%	14%	32%	40%	49%	1%	19%	0%
Live Audio via Online	0%	0%	0%	4%	24%	11%	2%	1%	0%
Files via Satellite	61%	4%	0%	6%	1%	0%	0%	0%	0%
Files via Online	0%	5%	71%	10%	29%	28%	46%	9%	24%
Physical Media	0%	30%	0%	32%	5%	0%	18%	2%	29%
Other	39%	0%	14%	15%	0%	11%	33%	70%	47%

Q3. How many hours of content form each of the following sources did your station broadcast last week

Sources Of External Programming

Of the various services that stations use to access external audio content, the Community Radio Network (CRN) is the most widely used. 41% of stations reported using CRN to access audio content. Regional and rural/remote stations relied more on CRN, with 46% and 53% respectively reporting using the service. This compares to 27% of suburban stations and 19% of metropolitan stations.

Many stations access CRN using the Digital Delivery Network, with the DDN used by 11% of stations. 19% of rural and remote stations use the DDN to access CRN content.

BBC is also widely used, with 13% of stations using the service. It is particularly prominent in metropolitan areas where 31% of stations rely on BBC content. Mediapoint Christian is used by 84% of religious stations, while 19% also use Hope Radio. Mediapoint RPH is used by 100% of RPH stations.

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
BBC	13%	31%	15%	9%	6%
Black Star (920)	0%	3%	0%	0%	0%
CRN (630/631)	41%	18%	27%	46%	53%
Digital Delivery Network (DDN)	11%	8%	0%	11%	19%
Hope Radio (633)	2%	3%	0%	3%	0%
Mediapoint (Christian sector)	9%	10%	0%	11%	10%
Mediapoint (RPH)	4%	22%	0%	0%	0%
NIRS (601-604)	8%	3%	5%	9%	11%
PAKAM (917)	4%	0%	0%	0%	16%
RPH Australia (632)	2%	13%	0%	0%	0%
SCMA's PDS	4%	0%	0%	6%	6%
Yolngu Radio (910)	0%	0%	0%	0%	0%
Other	55%	47%	68%	54%	55%

	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
Sample	3	1	101	15	6	18	6	4	0
BBC	20%	50%	67%	10%	0%	90%	0%	31%	0%
Black Star (920)	0%	0%	0%	0%	5%	0%	0%	0%	0%
CRN (630/631)	40%	0%	0%	53%	38%	0%	0%	37%	33%
Digital Delivery Network (DDN)	20%	25%	0%	15%	0%	0%	0%	0%	0%
Hope Radio (633)	0%	0%	0%	0%	0%	0%	19%	0%	0%
Mediapoint (Christian sector)	0%	0%	0%	0%	0%	0%	84%	0%	0%
Mediapoint (RPH)	0%	0%	0%	0%	0%	100%	0%	0%	0%
NIRS (601-604)	0%	0%	0%	2%	70%	0%	0%	0%	0%
PAKAM (917)	0%	0%	0%	0%	38%	0%	0%	0%	0%
RPH Australia (632)	0%	0%	0%	0%	0%	60%	0%	0%	0%
SCMA's PDS	0%	0%	0%	4%	13%	0%	0%	0%	0%
Yolngu Radio (910)	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	60%	50%	33%	55%	52%	30%	54%	94%	67%

Q4. Please indicate which external content sources you use to access audio content (% of Stations who use each service).
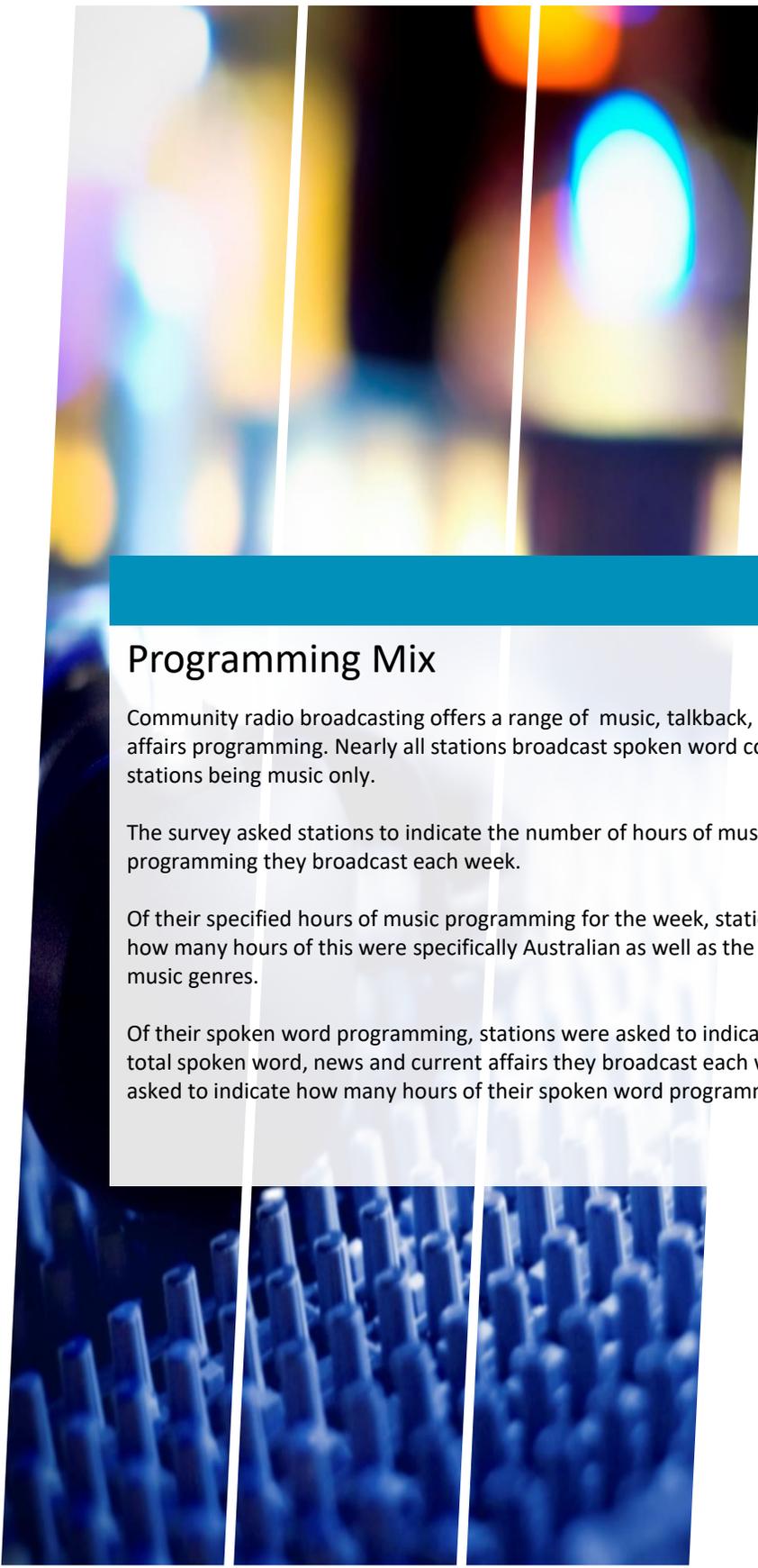
Programming Mix

Community radio broadcasting offers a range of music, talkback, news bulletins and current affairs programming. Nearly all stations broadcast spoken word content, with only a few stations being music only.

The survey asked stations to indicate the number of hours of music and spoken word programming they broadcast each week.

Of their specified hours of music programming for the week, stations were asked to indicate how many hours of this were specifically Australian as well as the number of hours of different music genres.

Of their spoken word programming, stations were asked to indicate the number of hours of total spoken word, news and current affairs they broadcast each week. Stations were also asked to indicate how many hours of their spoken word programming is locally produced.
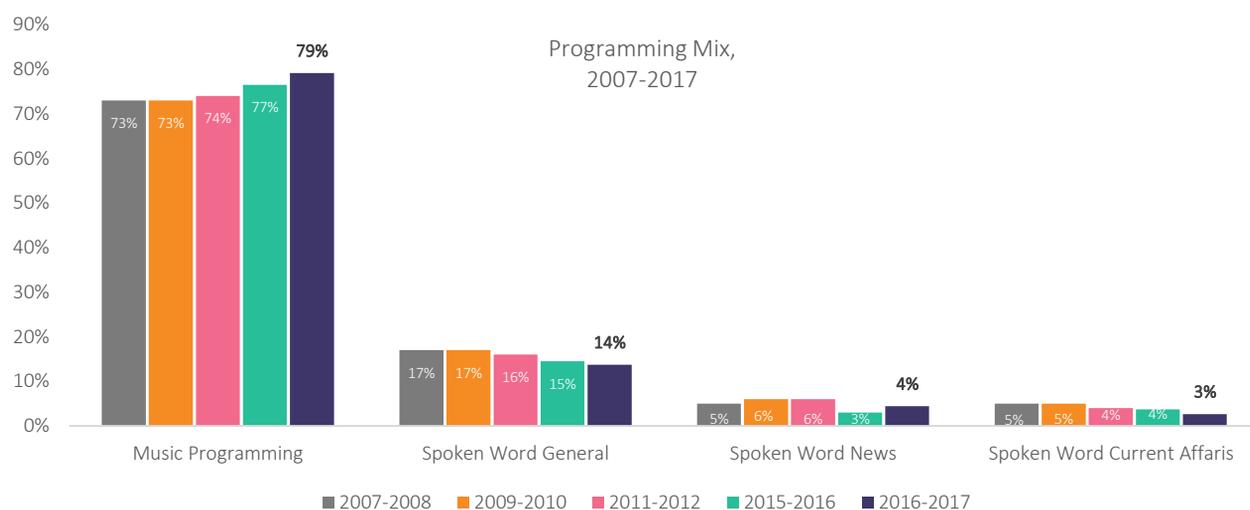
PROGRAMMING MIX

As well as broadcasting a diverse range of music, the sector also offers a range of talks, news bulletins and current affairs programming.

While the proportion of each has remained broadly consistent since the inception of the census in 2002-2003, the proportion of airtime dedicated to music continues to increase. Nationally, nearly 8 out of 10 hours (79%) of airtime in 2016-2017 was dedicated music programming. This was up from 77% in 2015-2016.

Like in prior years, stations located in regional and in rural and remote areas dedicate a larger proportion of their available broadcast hours to music programming, at 85% and 83% respectively.

In comparison, music programming comprises just 58% of all broadcasting by metropolitan stations who offer significantly more spoken word and current affairs programming than their non-metro counterparts. This is down from 62% in 2015-2016. Metropolitan stations present a significantly higher proportion of their airtime to general spoken word, or talkback, than suburban, regional and rural stations.

Fine music (99%), seniors (92%) and Indigenous (90%) stations dedicate at least 9 in every 10 hours to music, while music comprises only 2% of the programming of RPH stations and 28% of ethnic stations.

Programming Mix, 2007-2017

Legend: ■ 2007-2008 ■ 2009-2010 ■ 2011-2012 ■ 2015-2016 ■ 2016-2017

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	**156**	**26**	**20**	**75**	**35**
Music Programming	79%	58%	77%	85%	83%
Spoken Word General	14%	29%	14%	10%	11%
Spoken Word News	4%	8%	4%	4%	4%
Spoken Word Current Affairs	3%	5%	5%	1%	2%

	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
Sample	**3**	**3**	**1**	**101**	**15**	**6**	**18**	**6**	**4**
Music Programming	75%	28%	99%	83%	90%	2%	75%	92%	81%
Spoken Word General	18%	64%	1%	11%	5%	55%	20%	4%	17%
Spoken Word News	2%	7%	0%	4%	3%	27%	3%	4%	0%
Spoken Word Current Affairs	6%	2%	0%	2%	2%	16%	2%	0%	2%

Q6. How many hours of primarily MUSIC BASED PROGRAMMING, both locally and externally produced, did your station broadcast last week?
Q7. How many hours of primarily SPOKEN WORD CONTENT did your station broadcast last week?
Q9. How many hours of last week's spoken word content was live read and / or recorded NEWS BULLETIN CONTENT?
Q11. How many hours of last week's spoken word content was specifically CURRENT AFFAIRS?

MUSIC PROGRAMMING

A total of 44,188 hours of music-based programming was broadcast by community radio stations each week during 2016-2017, at an average of 132 hours per station. This is up from an average of 129 hours of music programming (per station, per week) in 2015-2016.

Regional stations play an average of 141 hours of music a week, compared to rural and remote stations (139 hours), suburban (125 hours) and metropolitan stations (97 hours).

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Total Hours per week	44,188	5,359	5,514	22,718	10,597
Average Hours per week	132	97	125	141	139

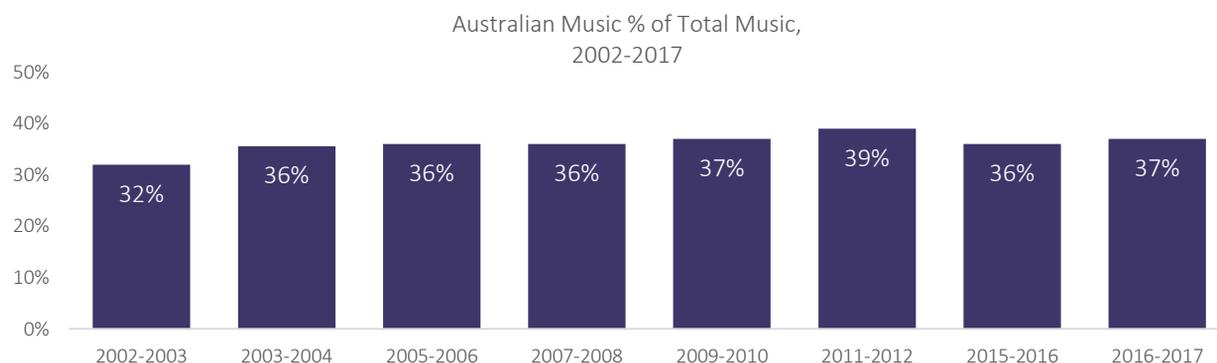## Australian Music Programming

Community radio plays an important role in supporting and promoting Australian music. Reflecting a consistent long term average, 37% of the music broadcast by community radio stations each week is Australian music. This exceeds the industry requirement of 25%. Nationally, 16,166 hours of Australian music is broadcast by community radio stations collectively each week.

Rural and remote stations dedicate a higher percentage of their music programming to Australian music than stations in other locations, with 43% of all music broadcast by stations in rural and remote areas being Australian music – up slightly from 41% in 2015-2016. This represents an average of 60 hours per week for each rural and remote station.
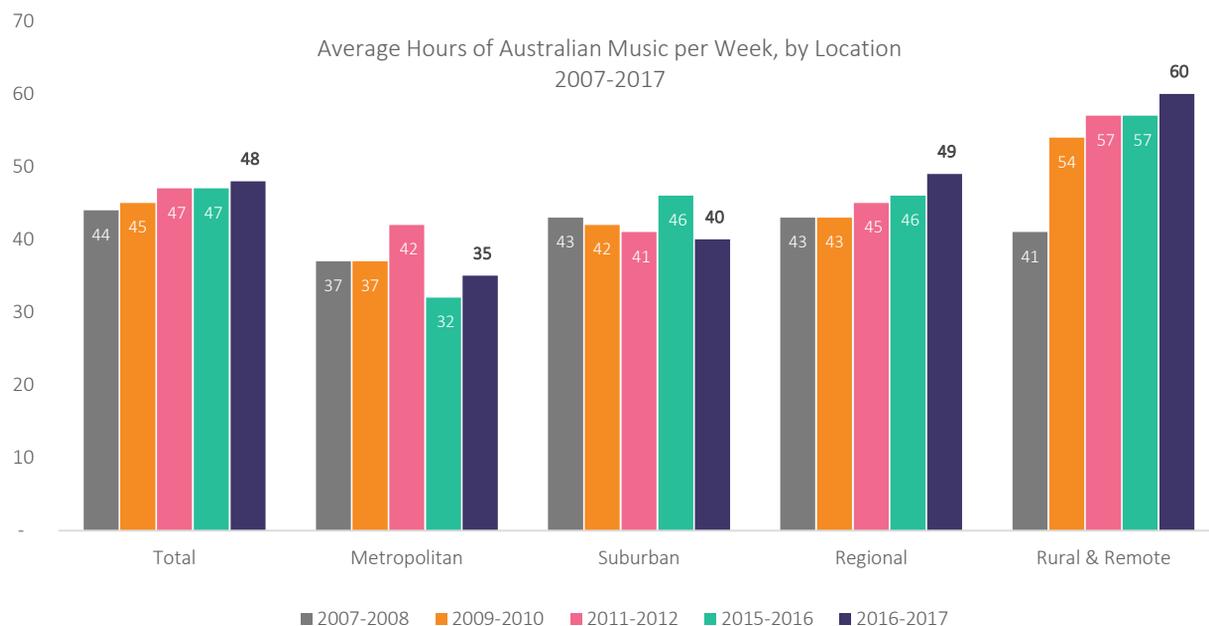
By comparison, 36% of the music broadcast by metropolitan stations is Australian music, up from 26% in 2015-2016. This represents 35 hours per week. Suburban and regional stations dedicate 32% and 35% of their music airtime to Australian music respectively. Suburban stations were the only group to report a lower average number of Australian music hours per week.

Again, youth and Indigenous stations dedicate the highest proportion of their music programming to Australian music. 50% of the music broadcast by Indigenous stations, or 75 hours per week, is Australian music. This is up from 62 hours per week last year. 69% of music played by youth stations is also Australian music, and is up significantly to 93 hours per week, on average, per station.
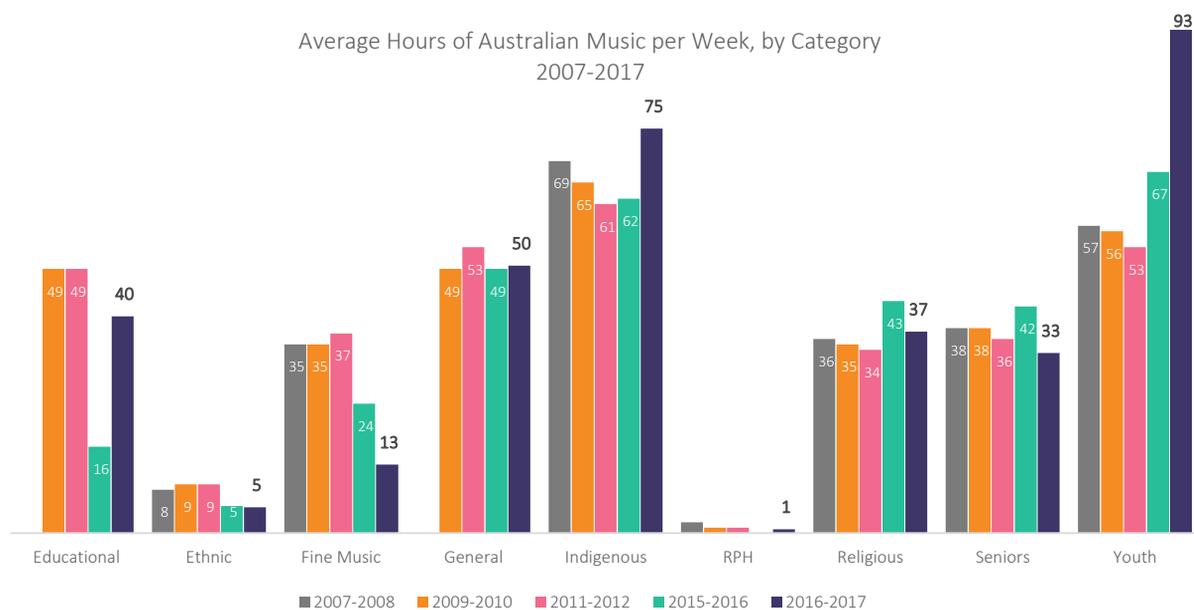
As in the last census, ethnic and fine music stations, who have a lower Australian music requirement of 10%, dedicated the lowest proportion of their music broadcasting to Australian music. General stations, the largest category of community radio stations, dedicate on average 36% of their weekly music programming to Australian music

Australian Music % of Total Music, 2002-2017

Year	Percentage
2002-2003	32%
2003-2004	36%
2005-2006	36%
2007-2008	36%
2009-2010	37%
2011-2012	39%
2015-2016	36%
2016-2017	37%

Q13. How many hours of that music based programming was AUSTRALIAN MUSIC?

Average Hours of Australian Music per Week, by Location 2007-2017

Legend: ■ 2007-2008 ■ 2009-2010 ■ 2011-2012 ■ 2015-2016 ■ 2016-2017

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Australian Music %	37%	36%	32%	35%	43%
Average Hours per Week	48	35	40	49	60
Total Hours per Week	16,166	1,949	1,761	7,877	4,579

Average Hours of Australian Music per Week, by Category 2007-2017

Legend: ■ 2007-2008 ■ 2009-2010 ■ 2011-2012 ■ 2015-2016 ■ 2016-2017

	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
Sample	3	3	1	101	15	6	18	6	4
Australian Music %	32%	10%	8%	36%	50%	25%	30%	23%	69%
Average Hours per Week	40	5	13	50	75	1	37	33	93
Total Hours per Week	281	29	38	10,758	2,391	8	1,418	400	840

Q13. How many hours of that music based programming was AUSTRALIAN MUSIC?

Music Programming by Genre

An important feature of community radio stations is the diversity of music they play. Most stations play a wide range of music genres for their audiences.

As a proportion of total music hours broadcast by the sector, easy listening was again the genre most often played by community radio stations. Consistent with 2015-2016, 21% of all music broadcast by community stations is easy listening music.

Pop and rock music also continue to represent a large proportion of music played by community stations. Up from 20% last year, 24% of music played by community stations was either rock or pop music. Country and nostalgia are the next most played music genres. 9% of music played by community radio stations is country music, while, up from 4% in 2015-2016, 7% of music played could be classified as nostalgia.

Australian Indigenous music aired on community radio in 2016-17 increased as a proportion of time. 5% of music played on community radio is Indigenous Australian music. In total, 2,152 hours of Indigenous Australian music was play by community radio stations each week. Most of this was played by regional (1,060 hours) and rural and remote (839 hours) stations.

Nationally, community radio stations broadcast a total of 2,441 hours of religious music each week. This represents 6% of all music played. Most of this was played by religious stations (1,979 hours), although general stations broadcast 354 hours of religious music each week in 2016-2017.

Other genres broadcast by community radio stations represent less than 3% of music played. These include blues (3%), world (3%), classical (2%), jazz (2%), folk (2%), funk (2%), electronic (1%), hip hop (1%), metal (1%) and reggae (1%). A range of specialist 'other' music outside of the categories above is also broadcast.

	% of Total Music		Total Hours per week	
	2016-2017	2015-2016	2016-2017	2015-2016
Easy Listening	21%	22%	9,483	9,706
Rock	12%	9%	5,298	3,836
Pop	12%	11%	5,117	4,813
Country	9%	11%	4,079	4,842
Nostalgia	7%	4%	2,999	1,951
Religious	6%	7%	2,441	3,021
Australian Indigenous	5%	3%	2,152	1,186
Other	3%	6%	1,175	2,619
Blues	3%	3%	1,316	1,171
World	3%	3%	1,164	1,136
Classical	2%	3%	891	1,317
Jazz	2%	2%	1,044	916
Folk	2%	2%	852	773
Funk	2%	1%	694	524
Electronic	1%	2%	568	766
Hip Hop	1%	1%	514	502
Metal	1%	1%	460	363
Reggae	1%	1%	362	303

Q14. Please indicate how many hours of the following music genres your station broadcast last week.

SPOKEN WORD PROGRAMMING

The sector also offers a range of spoken word, news bulletins and current affairs programming, with 21% of all programming dedicated to talk and news programs.

Overall, the sector broadcasts 11,624 hours of spoken word each week.

Local Spoken Word Programming

Of the spoken word programming broadcast by the sector, 62% is locally produced. This is down from 67% in 2015-2016.

Stations operating in all areas reported a lower proportion of local spoken word content than in 2015-2016. Suburban stations produce 76% of their spoken word content locally, while in metropolitan areas it's 63%. Regional and rural/remote stations produced 58% and 59% respectively of their spoken word content locally.

A large percentage (83%) of current affairs broadcasting is locally produced. Metropolitan and suburban stations produce over 90% of their current affairs content locally. This falls to 58% of current affairs content aired by rural and remote stations. 67% of general spoken word, or talkback, is produced by stations locally, down from 75% in 2015-2016.

Stations offer less locally produced news content, with 65% of news bulletins sourced from external sources. Metropolitan stations produce the largest proportion of their news (56%) locally. In 2016-2017, regional and rural stations only produced 25% and 18% respectively of their news content locally. This is down significantly from 39% and 43% respectively.

Proportion of Local Spoken Word Content, 2015-2017

Legend: ■ 2015-2016 ■ 2016-2017
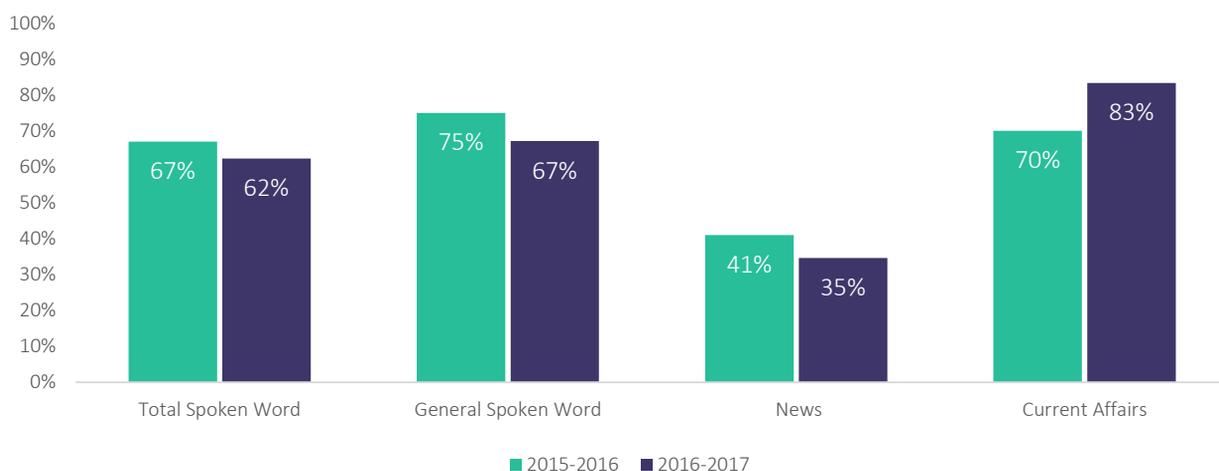
	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Local % of Total Spoken Word	62%	63%	76%	58%	59%
Local % of General Spoken Word	67%	59%	80%	66%	75%
Local % of Total News	35%	56%	42%	25%	18%
Local % of Total Current Affairs	83%	91%	93%	81%	58%

Q7/8. How many hours of primarily SPOKEN WORD CONTENT did your station broadcast last week? How many hours of that spoken word content was produced by your station?
Q9/10. How many hours of last week's spoken word content was live read and/or recorded NEWS BULLETIN CONTENT? How many hours of that news content was produced by your station?
Q11/12. How many hours of last week's spoken word content was specifically CURRENT AFFAIRS? How many hours of that current affairs content was produced by your station?

Spoken Word Programming by Location

Metropolitan stations dedicate a significantly higher proportion of airtime (42%) to spoken word programming than in 2015-2016, up from 35% in 2015-2016. Only 15% of regional and 17% of rural and remote community radio airtime is spoken word programming.

On average, metropolitan stations broadcast 69 hours (up from 59) of spoken word programming each week, 70% of which is general talkback. By comparison, suburban stations broadcast 38 hours, regional stations 24 hours and rural and remote stations 28 hours of spoken word each week. While the average number of hours of spoken word programming has fallen in suburban and regional stations, it has increased slightly in rural and remote areas.

Average Spoken Word Hours per Week, by Location
2011-2017

Legend: ■ 2011-2012 ■ 2015-2016 ■ 2016-2017
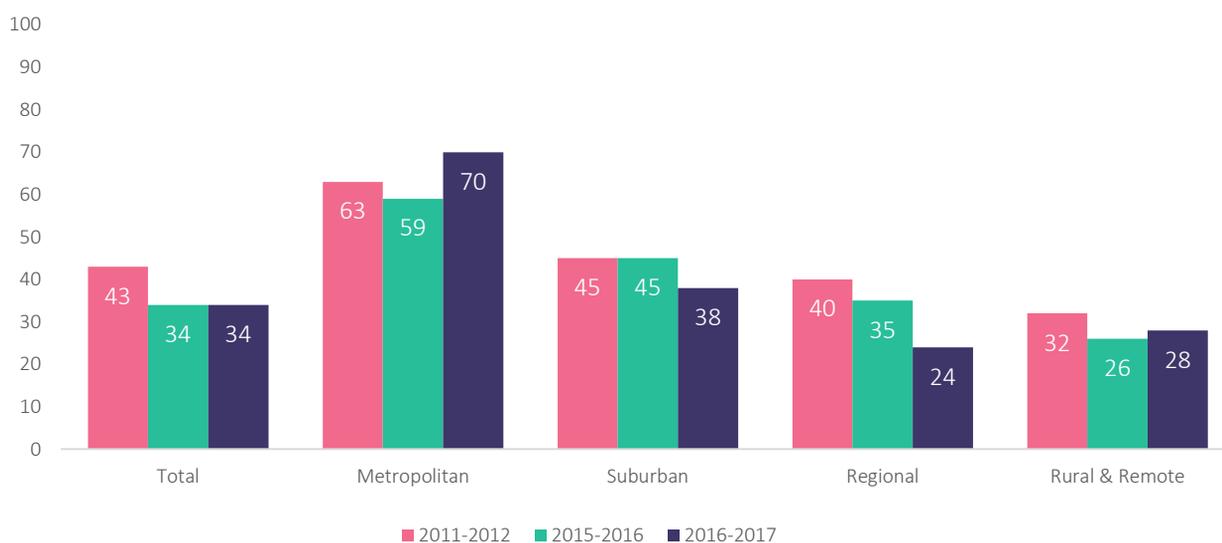
	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Spoken Word %	21%	42%	23%	15%	17%
Total Hours per Week	11,624	3,871	1,653	3,934	2,166
Average Hours Per Week					
Total Spoken Word	34	69	38	24	28
Spoken Word General	23	48	23	16	18
Spoken Word News	7	13	7	6	7
Spoken Word Current Affairs	4	9	8	2	3

Q7/8. How many hours of primarily SPOKEN WORD CONTENT did your station broadcast last week? How many hours of that spoken word content was produced by your station?
Q9/10. How many hours of last week's spoken word content was live read and/or recorded NEWS BULLETIN CONTENT? How many hours of that news content was produced by your station?
Q11/12. How many hours of last week's spoken word content was specifically CURRENT AFFAIRS? How many hours of that current affairs content was produced by your station?

Spoken Word Programming by Category

RPH stations dedicate nearly all (98%) of their airtime to spoken word programming to meet the needs of their community interest. While 56% (93 hours per week) is general talkback, RPH stations also broadcast 45 hours of news and 28 hours of current affairs programming each week. Of the spoken word programming broadcast by RPH stations (which represents 98% of their airtime) 95% of current affairs, 65% of news and 30% of general spoken word is locally produced.

Ethnic stations also devote a large proportion (73%) of their broadcast time to spoken word programming. A majority of spoken word programming broadcast by ethnic stations (88%), or 106 hours per week, is general spoken word. Ethnic stations also broadcast an average of 12 hours of news per week. While ethnic stations produce a lower proportion (37%) of their news content, 96% of their general spoken word is produced locally.

Educational and religious stations both dedicate approximately a quarter of their programming time to spoken word programs, with an average of 43 and 42 hours respectively of spoken word programming each week.

The proportion of airtime dedicated to spoken word programming fell in Indigenous stations, from 46 hours in 2015-2016 to 18 hours in 2016-2017.

Youth stations produce the highest proportion of their 32 hours of spoken word content locally, producing 100% of their news and current affairs, and 82% of their general spoken word programs. Similarly, educational stations produce 92% of their current affairs, 79% of their news and 65% of their talkback in house. Religious (27%) stations produce a lower proportion of their spoken word content locally.

Average Spoken Word Hours per Week, by Category
2011-2017
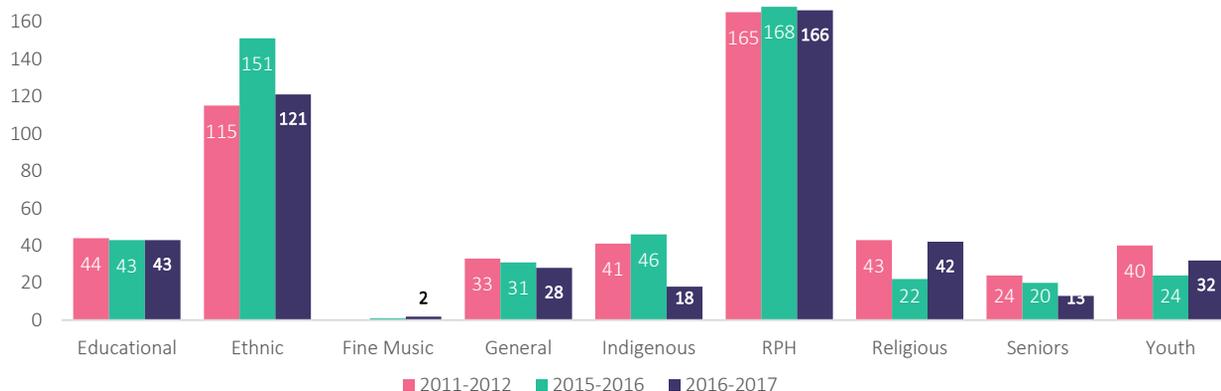
	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
Sample	3	3	1	101	15	6	18	6	4
% Spoken Word	26%	73%	1%	17%	10%	98%	25%	8%	19%
Total Hours per week	300	720	6	6,023	563	1,982	1,590	157	288
Average Spoken Word Hours									
Total Spoken Word	43	121	2	28	18	166	42	13	32
Spoken Word General	30	106	1	18	9	93	33	6	29
Spoken Word News	3	12	1	6	5	45	6	6	0
Spoken Word Current Affairs	10	3		4	4	28	3	1	3

Q7/8. How many hours of primarily SPOKEN WORD CONTENT did your station broadcast last week? How many hours of that spoken word content was produced by your station?
Q9/10. How many hours of last week's spoken word content was live read and/or recorded NEWS BULLETIN CONTENT? How many hours of that news content was produced by your station?
Q11/12. How many hours of last week's spoken word content was specifically CURRENT AFFAIRS? How many hours of that current affairs content was produced by your station?

Specialist Programming

Community radio broadcasting provides information and content that serves the interests of many diverse groups within Australian society.

To understand the specialist programming that is broadcast by community radio stations, survey participants were asked to indicate the number of hours each week they dedicate to specialist programming, including Indigenous, ethnic, religious, RPH Radio Reading, LGBTQI, seniors, women's, sports and youth.
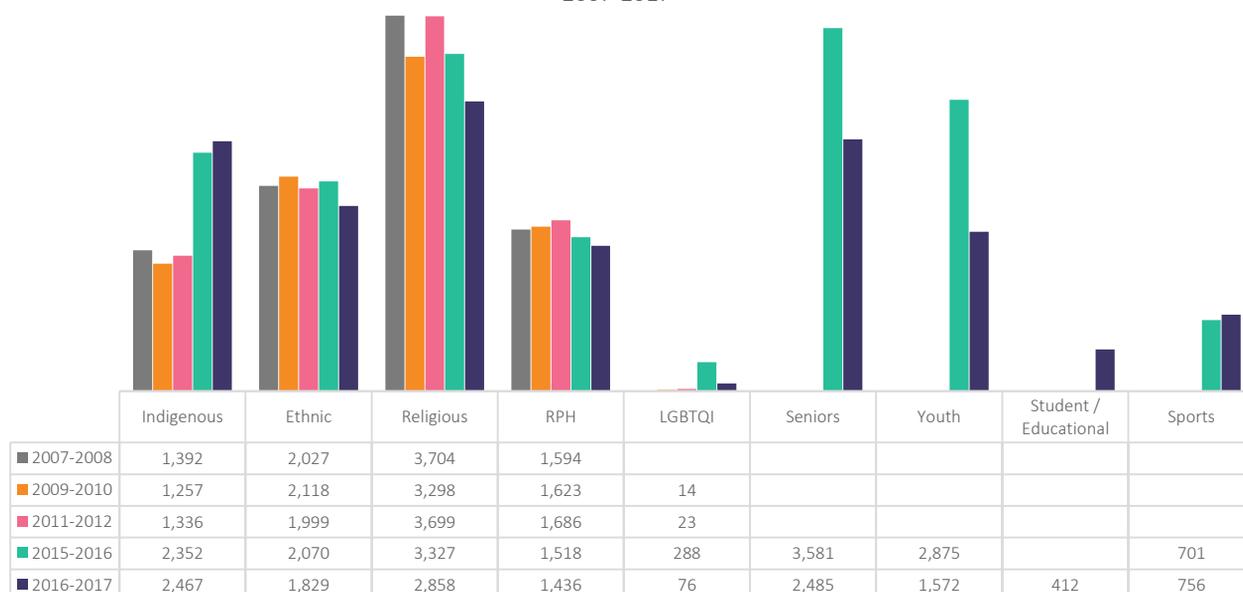
Stations were also asked to indicate how many hours of this specialist programming is locally produced by their station.

SPECIALIST PROGRAMMING

Community radio broadcasting provides information and content that serves the interests of many diverse groups within Australian society. While the number of hours of Indigenous programming again increased, ethnic programming fell slightly. Despite falling, more hours continue to be devoted to religious programming than any other specialist program.

- Indigenous programming continues to increase. After increasing to 2,352 hours in 2015-2016, stations reported broadcasting 2,467 hours weekly in 2016-2017.

- The number of hours of ethnic programming broadcast each week has fallen to 1,829, down from 2,070 since the last census. This remains broadly consistent with trend data.

- While still higher than any other category, the number of hours of weekly religious (2,858) programming was again lower than in the previous census period. Analysis of the data indicates that, as in 2015-2016, a fall in the number of large religious stations contributing to the survey has contributed to the fall in the average, and overall, hours reported.

- A total of 1,436 hours of radio for Australians with a print disability was broadcast each week during 2016-2017, broadly consistent with prior periods.

- The number of hours of LGBTQI programming also fell significantly, although at 76 hours per week, it remains higher than in 2011-2012 when 23 hours of LGBTQI programs were broadcast. Analysis of the data indicates that sample variations may account for this fall.

- Seniors programming, although significantly lower, remains high at 2,485 hours per week.

- Fewer stations indicated that they have programs produced by people under the age of 26. Consequently, the total hours of youth programming fell, from 2,875 in 2015-2016 to 1,572 in 2017-2018.

- Sports programming is consistent at 756 hours per week.

Total Hours of Specialist Programming per Week
2007-2017

	Indigenous	Ethnic	Religious	RPH	LGBTQI	Seniors	Youth	Student / Educational	Sports
2007-2008	1,392	2,027	3,704	1,594					
2009-2010	1,257	2,118	3,298	1,623	14				
2011-2012	1,336	1,999	3,699	1,686	23				
2015-2016	2,352	2,070	3,327	1,518	288	3,581	2,875		701
2016-2017	2,467	1,829	2,858	1,436	76	2,485	1,572	412	756

Q16/20/24/26/28/29/30/31/32. How many hours of (Specialist) Programming did your station broadcast last week?
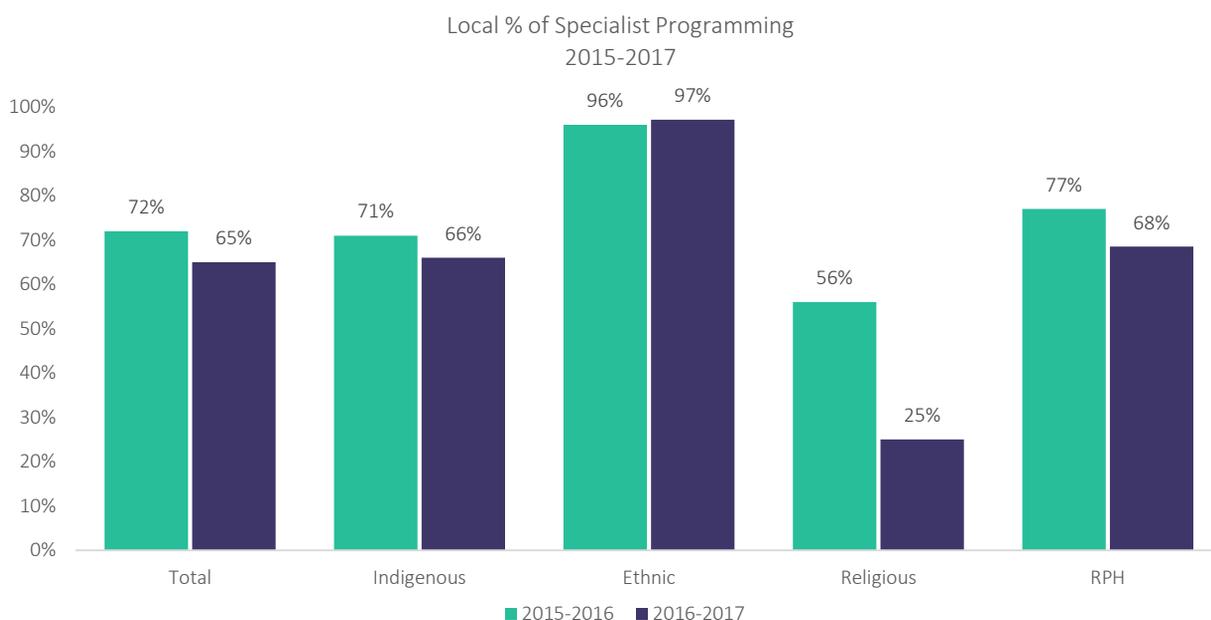
Locally Produced Specialist Programming

65% of all specialist programming in 2016-2017 was produced locally by community broadcasting stations. This is down from 72% in 2015-2016.

For some specialist programming, this figure is significantly higher. Nearly all (97%) ethnic programming is produced locally in community broadcasting stations.

Approximately two-thirds of all Indigenous programming (66%) is locally produced, as is 68% of RPH Radio Reading programming.

Religious stations continue to produce the lowest percentage of their content locally, with only 23% of all religious programming broadcast each week produced by local community radio stations. While this is significantly lower than all other station categories, detailed analysis of the data provided by religious stations indicates that this an accurate reflection of location content production by this sub-sector.

Local % of Specialist Programming 2015-2017

Q17/21/25/27 . How many hours of that (Specialist) Programming was produced by your station?

Indigenous Programming

Community radio stations broadcast over 2,467 hours of Indigenous programming each week, of which 66% is locally produced. Of this, approximately half (1,266 hours) is broadcast by stations serving rural and remote Indigenous communities.

A total of 909 hours of Indigenous programming is presented in an Indigenous Australian language each week. Analysis of the data indicates that the composition of the sample may have had some impact on the change from last year, with three new stations reporting significantly higher Indigenous language programming than those who responded in 2015-2016.

Like in 2015-2016, nearly all (98%) Indigenous language programming is locally produced.

**Indigenous Programming,
2015 - 2017**
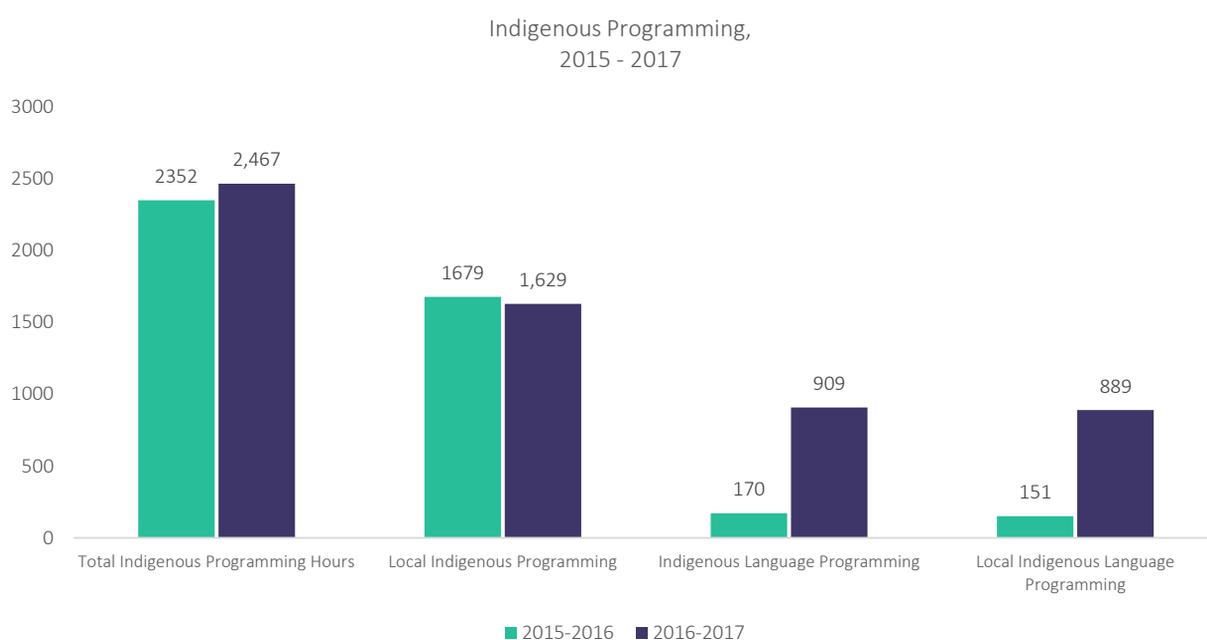
	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	**156**	**26**	**20**	**75**	**35**
% of respondents who answered question	25%	20%	5%	33%	28%
Total Indigenous Programming Hours	2,467	321	5	876	1,266
Local Indigenous Programming	1,629	313	5	514	797
% Indigenous Programming Produced Locally	**66%**	**98%**	**100%**	**59%**	**63%**
Indigenous Language Content	909	141	0	429	339
Locally Produced Indigenous Language Content	889	141	0	414	335
% Indigenous Language Programming Produced Locally	**98%**	**100%**	**0%**	**96%**	**99%**

Q16. How many hours of Indigenous Programming did your station broadcast last week?
Q17. How many hours of that Indigenous Programming was produced by your station?
Q18. How many hours of last week's Indigenous programming was presented in an Indigenous Australian language?
Q19. How many hours of that Indigenous Australian language content was produced by your station?

Ethnic Programming

As well as serving Indigenous communities, community radio broadcasts programs that meet the needs of many Culturally and Linguistically Diverse (CALD) communities in Australia.

A total of 1,829 hours of ethnic programming is broadcast each week, of which 97% is locally produced. Like in previous years, there was a relatively even distribution of programming across metropolitan (695 hours) and suburban (673 hours) locations. There was also some programming in regional (259 hours) and rural/remote (202 hours) areas.

Of the ethnic programs broadcast by community radio stations, 84%, or 1,535 hours, are presented in a language other than English or an Australian Indigenous language each week. Nearly all (99%) of this is produced locally by community stations.

Ethnic Programming, 2015-2017
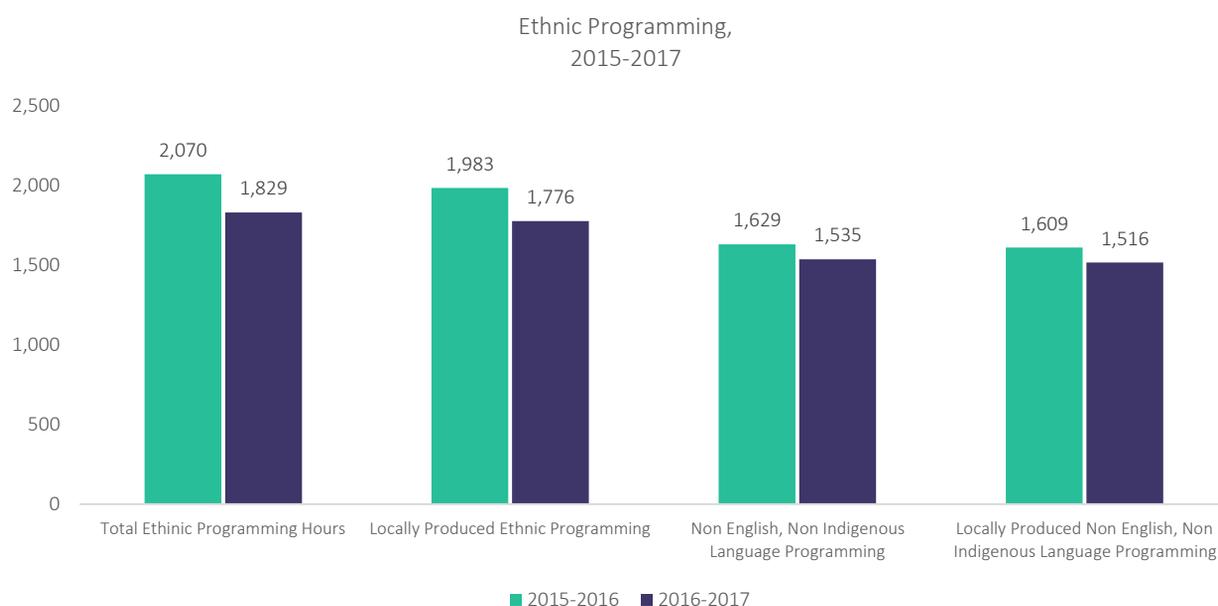
	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
% of Stations who answered question	36%	25%	68%	35%	34%
Total Ethnic Programming Hours	1,829	695	673	259	202
Locally Produced Ethnic Programming	1,776	665	673	245	194
% Ethnic Programming Produced Locally	97%	96%	100%	94%	96%
Non English, Non Indigenous Language Content	1,535	625	619	154	137
Locally Produced Non English, Non Indigenous Language Content	1,516	625	619	147	125
% Non English, Non Indigenous Language Content Produced Locally	99%	100%	100%	95%	91%

Q20. How many hours of Ethnic Programming did your station broadcast last week?
Q21. How many hours of that Ethnic Programming was produced by your station?
Q22. How many hours of last weeks' spoken word content was presented in a language other than English or an Indigenous Australian language?
Q23. How many hours of that non-English, non-Indigenous Australian language content was produced by your station?

Other Production Activity

Aside from live broadcasting, community radio stations produce and make available a variety of other material for their listeners.

The next section of the survey asked stations to provide information about the other local production activities they undertake, including production of podcasts, video content, online-only audio, recording of live Australian music broadcasts and outside broadcasting.

DIGITAL PROGRAMMING

Nationally, 34 stations broadcast content on their DAB+ digital radio services per week. DAB+ digital radio services are provided in a variety of ways, including simulcast or time-shifted content from stations' AM/FM services, and unique content produced exclusively for the digital service.

A majority of stations with digital licenses (62%) provide a simulcast service on the DAB+ service that is exactly the same as their FM or AM service. A further 23% produce unique content solely for their DAB+ service, while 15% offer a mixture of time-shifted content and simulcast and/or unique content.

Amongst stations who produce unique content, on average they produce 56 hours per week or 164 hours in total. A total of 124 hours per week is also time-shifted content from stations' AM/FM service.
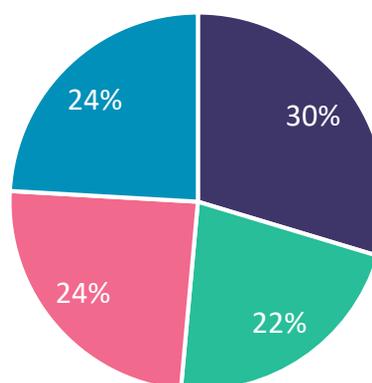
Digital Programming 2016-2017
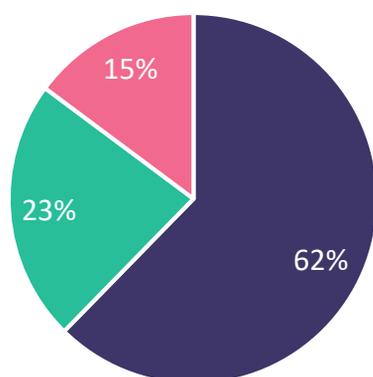
- Simulcast (exactly the same as your FM or AM service)
- Unique content produced solely for your DAB+ digital broadcast service
- A mixture of time shifted content and simulcast and/or unique content

Q35. Is your DAB+ radio service:

Plan to Change/Develop DAB+ Digital Radio Service 2016-2017

- No
- Yes, within the next 12 months
- Yes, within the next 2 years
- Don't know/unsure

Q38. Do you have plans to change or develop your DAB+ digital radio service?

Time Shifted Content	Total
Sample	3
Average hours per week	43
Total hours per week	125

Exclusive Content	Total
Sample	3
Average hours per week	56
Total hours per week	164

Q36. How many hours per week of your DAB+ digital radio service is time-shifted content from your FM or AM service?
Q37. How many hours per week is content produced exclusively for your DAB+ digital radio service?

ONLINE CONTENT

Podcasts

In total, 11,559 hours of podcasts are uploaded to online platforms by community radio stations each week. This equates to an average of 34 hours of audio to online platforms for podcast/online listening each week uploaded by the 336 community radio stations during 2016-2017. This is up from an average of 24 hours per station in 2015-2016.

Again a large proportion of podcasts are produced by regional, rural and remote stations. In total, 7,850 hours of audio was uploaded to online platforms by stations in regional and rural areas. This is a 75% increase from 2015-2016 and makes a significant contribution to serving the needs of Australia's regional and rural population.

Online Only Content

Stations also produced 62,139 hours of online only content for listeners over the last 12 months. This is up 91% from 2015-2016, when 32,561 hours of online only content was produced by stations.

The majority of the increase in production is by suburban and regional stations, who produced 22,777 and 21,833 hours respectively. This is reflected in the increase in production by general stations, whose production of online only content increased from 14,484 in 2015-2016 to 44,638 hours in 2016-2017. Religious stations continue to produce a large amount of online content, producing nearly 16,645 hours of online-only content over the last 12 months, an average of 438 hours each.

Video Content

New video content is also being produced by stations, with 2,400 hours being uploaded to online platforms by stations over the last 12 months. Metropolitan stations remain the biggest producers of new video content, creating an average of 25 hours each over the last 12 months. Nearly half (1,140 hours) of all video content produced was by youth stations.

Hours of Online Content, 2015-2017

Podcasts: 2015-2016: 7,249; 2016-2017: 11,559
Video: 2015-2016: 1,922; 2016-2017: 2,400
Online Only Content: 2015-2016: 32,561; 2016-2017: 62,139

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	**156**	**26**	**20**	**75**	**35**
Podcasts	11,559	2,372	1,338	5,751	2,099
Video	2,400	1,397	266	474	264
Online Only Content	62,139	17,489	22,777	21,833	40

	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
Sample	**3**	**3**	**1**	**101**	**15**	**6**	**18**	**6**	**4**
Podcasts	638	608	161	7,720	150	52	1,071	960	201
Video	113	0	0	948	47	2	147	5	1,140
Online Only Content	28	21	0	44,638	110	36	16,645	0	645

Q33. How many hours of audio did your station upload to online platforms for podcast / online listening last week?.
Q33. How many hours of new video content did your station upload to online platforms for listeners to access in the last 12 months?
Q33. How many hours of online only audio content did your station produce in the last 12 months?

OTHER BROADCAST ACTIVITY

Australian Music Performance

Over the last 12 months, community radio station recorded just over 45,000 hours of Australian music performance for broadcast.

Of this, over 25,000 hours of this was recorded by regional, rural and remote stations. Rural and remote stations each recorded, on average, over 132 hours of live Australian music performance for broadcast over the last 12 months. Regional stations recorded an average of 94 hours each, while suburban stations recorded an average of 395 hours and metropolitan stations an average of 50 hours each of Australian music performance.

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	**156**	**26**	**20**	**75**	**35**
Australian Performance					
Total Hours	45,382	2,766	17,412	15,204	10,000
Average Hours	135	50	396	94	132
Outside Broadcasts					
Total Hours	3,244	519	360	1,562	803
Average Hours	10	9	8	10	11

Q33. How many hours of Australian music performance did your station record for broadcast in the last 12 months?

Outside Broadcasts

Like in 2015-2016, approximately 3,000 outside broadcasts were conducted nationally. Of these, 519 were conducted by metropolitan stations, 360 by suburban stations, 1,562 by regional stations and 803 by rural and remote stations. Stations across all areas conducted an average of between 8 and 11 outside broadcasts each over the last 12 months.

Indigenous stations were the most likely to conduct outside broadcasts, at an average of 20 each. Ethnic stations also conducted an average of 18 outside broadcasts each. General stations again conducted an average of 10. The average number of outside broadcast conducted by religious stations fell from 8 to 6 over the last 12 months.

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	Educational	Ethnic	Fine Music	General	Indigenous	RPH	Religious	Seniors	Youth
Sample	**3**	**3**	**1**	**101**	**15**	**6**	**18**	**6**	**4**
Australian Performance									
Total Hours	146	3	241	38,332	1,198	0	1,756	3,657	33
Average Hours	21	1	80	177	37	0	46	305	4
Outside Broadcasts									
Total Hours	87	111	5	2,075	656	2	216	50	42
Average Hours	12	19	2	10	20	0	6	4	5

Q33. How many hours of outside broadcasts did your station conduct in the last 12 months?

CONTENT DISTRIBUTION

Community radio stations also supply locally produced content to different recipients or services. These include community sector-based distribution services (such as CRN and NIRS), other individual community broadcasting stations, non-sector programming services and media organisations, and other government, not-for-profit or commercial organisations.

Given their size and resources, metropolitan stations are the biggest contributors, with 51% supplying locally produced content to community sector distribution services – up from 43% in 2015-2016. Approximately 21% of stations in suburban areas, 17% in rural and remote areas and 9% in regional areas also supply content to sector-based distribution services.

Stations also provide content to other individual community radio stations. 33% of metropolitan stations provide content to other individual stations, as do 12% of regional and 17% of rural and remote stations.

% of Stations Supplying Locally Produced Content to Different Recipients / Services
2016-2017

Legend: ■ Total ■ Metropolitan ■ Suburban ■ Regional ■ Rural & Remote
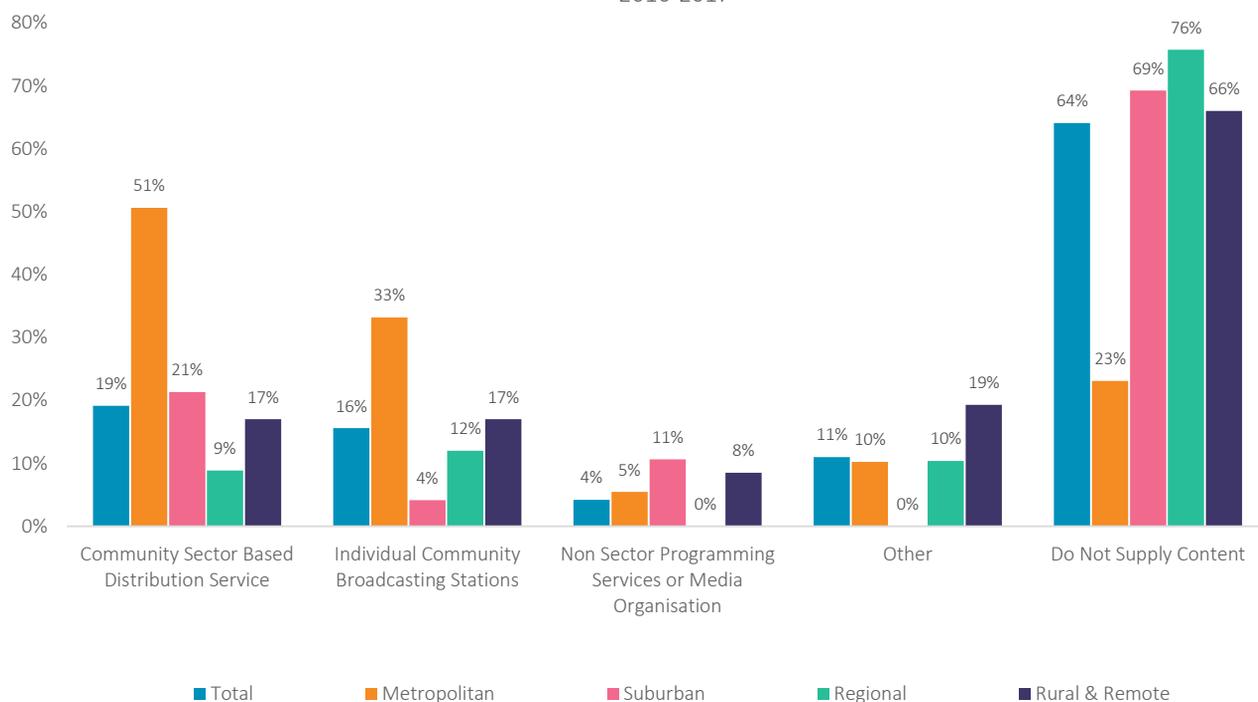
Q34. Does your station supply locally produced program content to any of the following recipients / services?

Online & Networking

To understand how stations are working, the survey asked stations to provide information about their internet connection and networking infrastructure.

They were also asked about their website capabilities and functionality, including how they use their website for content delivery and for a variety of other functions.
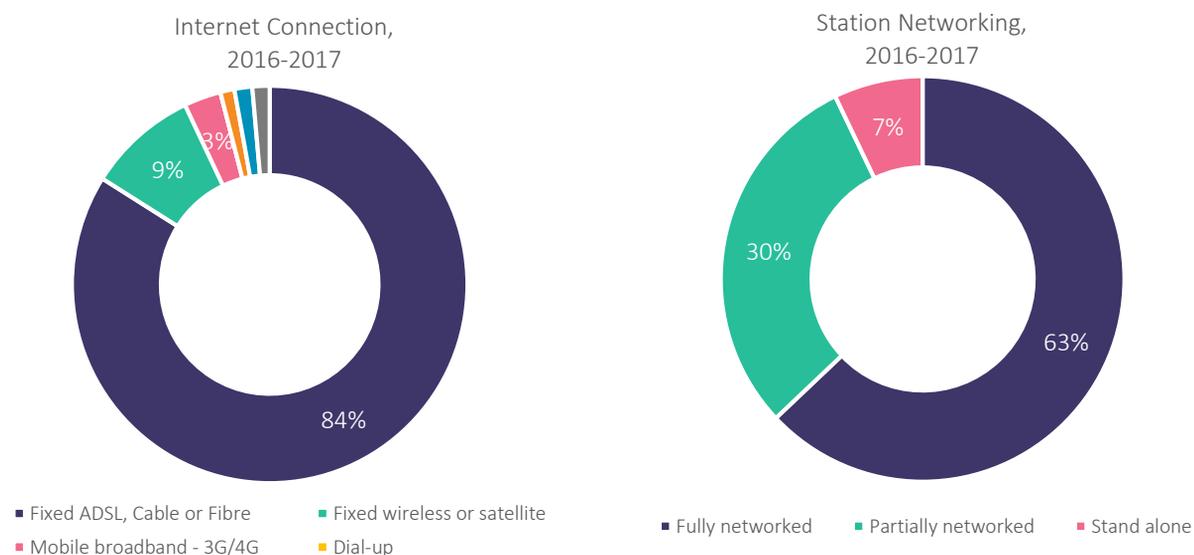
NETWORKING

99% of stations have internet access, consistent with the results of the 2011-2012 census.

Of those stations, 84% have fixed ADSL, cable or fibre to connect to the internet. There has been a slight shift to wireless, with 9% fixed wireless or satellite (up from 5% in 2015-2016), and 3% mobile broadband (up from 1% in 2015-2016). Stations in rural and remote areas are less likely to use fixed ADSL, cable or fibre than other stations. While all metropolitan and suburban stations have an internet connection, 6% of rural and remote stations are not connected to the internet. NBN was the dominant form of 'other' connection.

Stations networking status varies by station size and location. A similar proportion of stations are networked as in 2015-2016. 63% remain fully networked, while 30% are partially networked and 7% operate on standalone computers.

Metropolitan stations were more likely to be networked with 77% fully networked. This compares to only approximately 60% of suburban, regional and rural or remote stations. All metropolitan areas, who are not fully networked report being partially networked. Consistent with prior surveys, 16% of stations in rural and remote areas operate using standalone computers.

Internet Connection, 2016-2017

- Fixed ADSL, Cable or Fibre
- Fixed wireless or satellite
- Mobile broadband - 3G/4G
- Dial-up

Station Networking, 2016-2017

- Fully networked
- Partially networked
- Stand alone

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Fixed ADSL, Cable or Fibre	84%	88%	84%	86%	77%
Fixed wireless or satellite	9%	3%	16%	8%	12%
Mobile broadband - 3G/4G	3%	2%	0%	3%	5%
Dial-up	0%	0%	0%	0%	0%
Other	1%	7%	0%	0%	0%
Unsure	1%	0%	0%	3%	0%
No internet connection	1%	0%	0%	0%	6%

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Fully networked	63%	77%	63%	59%	61%
Partially networked	30%	23%	32%	35%	23%
Stand alone	7%	0%	5%	6%	16%

Q39. What is the principal form of internet connection at your station?
Q40. Are your stations computers and / or services fully networked, partially networked or stand alone?

WEBSITE

Website ownership has increased, with 96% of stations reporting website ownership in 2016-2017, up from 94% in 2015-2016.

Website for Content Delivery

Nearly all (94%) stations now publish a program guide online, up from 85% in 2015-2016. Simulcast audio streaming is also popular, with 85% of stations streaming audio live through their website.

Overall, 32% of stations podcast their content, consistent with 2015-2016. However, while 68% of metropolitan stations load podcasts onto their website, only 25% of suburban and regional stations, and 21% of rural and remote stations offer podcasts to listeners via their website.

The use of station websites to stream audio on demand and to provide dynamic now/next program data remains stable. Fewer stations use mobile apps to deliver content.

Other Website Uses

Promoting sponsors also remains a common use for a station's website. 80% of stations use their website to promote sponsors. Fine music stations are the least likely to have an area on their website to do so.

More stations also provide a forum for listener feedback on their website than in previous years. While over half of stations (55%) have a devoted listener feedback section on their website, they are less common for metropolitan stations than for their suburban and regional counterparts.

Social media plug-ins are also used by 55% of stations on their websites. Use is reasonably consistent across stations in all areas. Religious, Indigenous and youth stations are most likely to use social media plug-ins.

The use of station websites for online payment systems remains consistent at 38%, although metropolitan and suburban stations are more likely to use them. Educational, fine music and religious stations are the most likely to use online payment systems.

Music playlists are also provided by 28% of stations, most commonly by educational, fine music and youth stations.

		Total	Metropolitan	Suburban	Regional	Rural & Remote
Website		**156**	**26**	**20**	**75**	**35**
	Yes	96%	100%	100%	95%	90%
	No	4%	0%	0%	5%	10%

Q41. Does your station have a website?

Website Use for Content Delivery 2015-2017

Legend: ■ 2015-2016 ■ 2016-2017
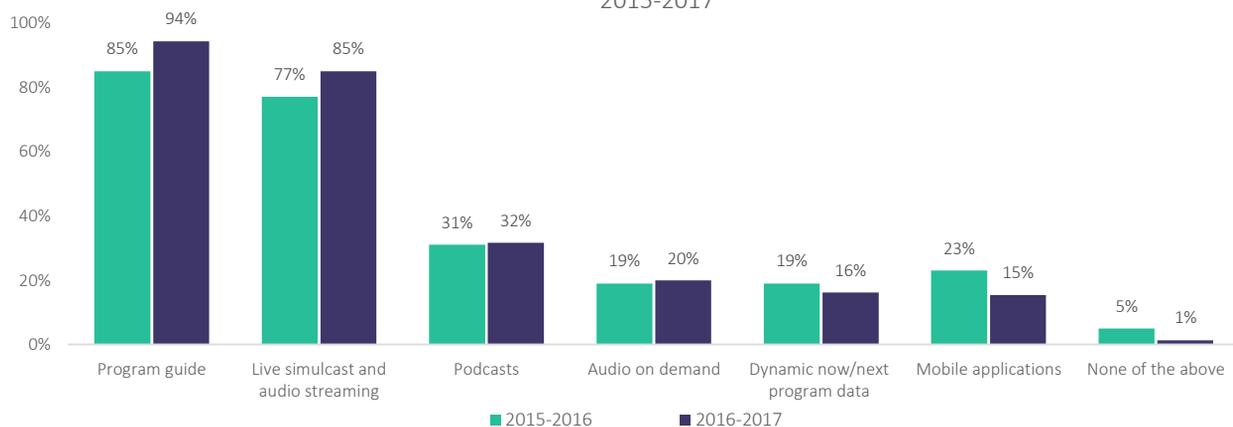
	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	**156**	**26**	**20**	**75**	**35**
Program guide	94%	98%	100%	93%	91%
Live simulcast and audio streaming	85%	95%	89%	80%	86%
Podcasts	32%	68%	25%	25%	21%
Audio on demand	20%	55%	27%	10%	11%
Dynamic now/next program data from play out system	16%	24%	27%	15%	7%
Mobile applications	15%	19%	37%	10%	9%
None of the above	1%	0%	0%	3%	0%

Q42. Please indicate all of the ways that your station uses its website for content delivery.

Other Website Uses, 2016-2017

Legend: ■ 2015-2016 ■ 2016-2017
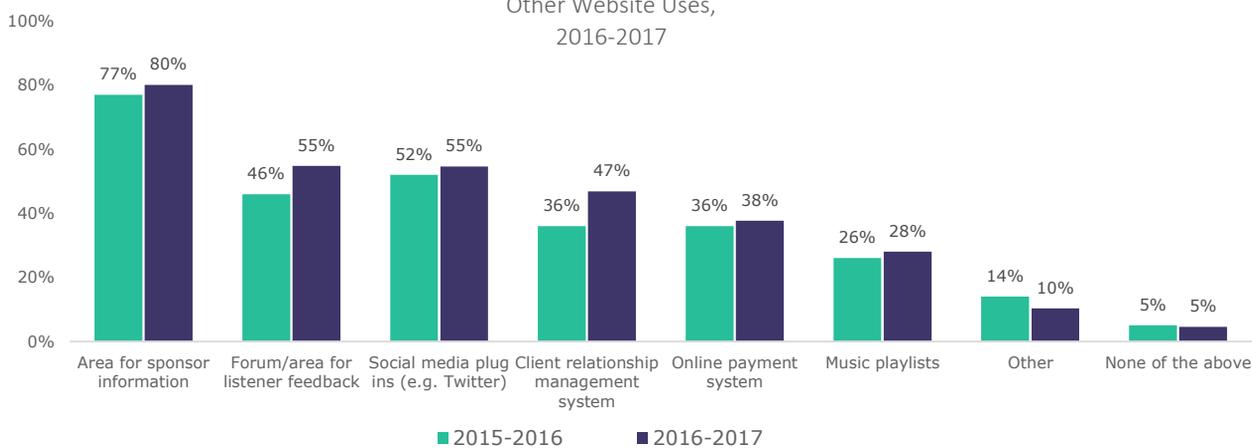
	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	**156**	**26**	**20**	**75**	**35**
Area for sponsor information	80%	82%	89%	77%	80%
Forum/area for listener feedback	55%	38%	57%	60%	54%
Social media plug ins (e.g. Twitter)	55%	49%	63%	53%	57%
Client relationship management system	47%	48%	36%	41%	67%
Online payment system	38%	63%	41%	26%	41%
Music playlists	28%	46%	43%	25%	10%
Other	10%	7%	11%	13%	7%
None of the above	5%	0%	5%	6%	3%

Q43. Please indicate all of the other ways that your station uses its website

Transmission and Production Infrastructure

Stations were also asked to provide details about their transmission and content production infrastructure, including their broadcast automation system, broadcast studios and studios available for production and training.

They were also asked about their program exchange capabilities, how they exchange programs and program material and whether they are capable of broadcast quality exchange.

Stations' use of CRN and DDN was also investigated.

TRANSMISSION INFRASTRUCTURE

The methods station use to connect to their transmission site are relatively consistent with 2015-2016.

48% of stations overall use an analogue radio link. While used by approximately 45% of stations in metropolitan, suburban and regional stations, 61% of rural and remote stations rely on an analogue radio link.

More stations are using an ACMA licensed digital radio link, with 23% of stations doing so in 2016-2017. Fewer stations use an unlicensed digital radio link (4% compared to 6% in 2015-2016).

While there has been an increase in stations using ISDN to connect to the transmission site (from 8% to 10%) fewer stations are using a public broadcast connection (5%). ISDN connections are more commonly used by metropolitan stations.

Transmission Infrastructure,
2012-2017

■2012-2013 ■2015-2016 ■2016-2017
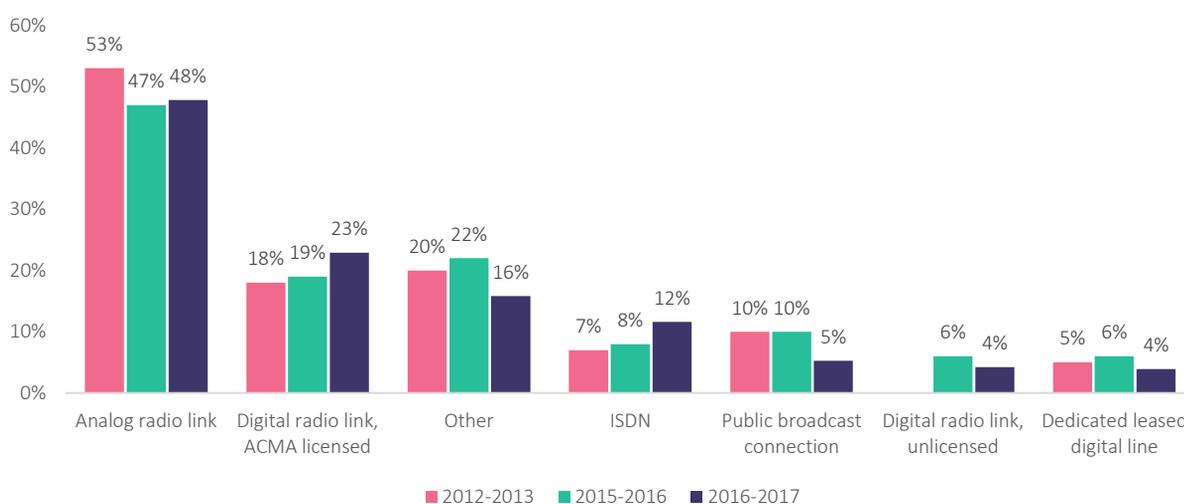
	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Analog radio link	48%	44%	47%	43%	61%
Digital radio link, ACMA licensed	23%	22%	27%	23%	22%
Other	16%	19%	11%	18%	12%
ISDN	12%	25%	16%	10%	3%
Public broadcast connection	5%	8%	0%	4%	8%
Digital radio link, unlicensed	4%	3%	0%	6%	3%
Dedicated leased digital line	4%	16%	0%	3%	0%

Q44. What method do you use to link your studio to your transmitter site?.

Transmission Site Ownership

Approximately 39% of stations lease their transmission site from a commercial provider. Commercial leases are more prevalent amongst metropolitan stations, with 58% of metropolitan stations leasing their facilities from a commercial provider, down from 66% in 2015-2016. Metropolitan stations are also more likely than those in suburban and regional or rural areas to lease their transmission site as part of a consortium of other stations.

Leasing from a local government is also relatively common, particularly amongst suburban and regional stations. 21% of suburban and 30% of regional stations have lease arrangements with their local municipal government.

Stations based in regional and remote areas are significantly more likely to own their transmission facilities. A third (32%) of rural stations own their own transmission site.

Transmission Site / Facilities Ownership
2012-2017
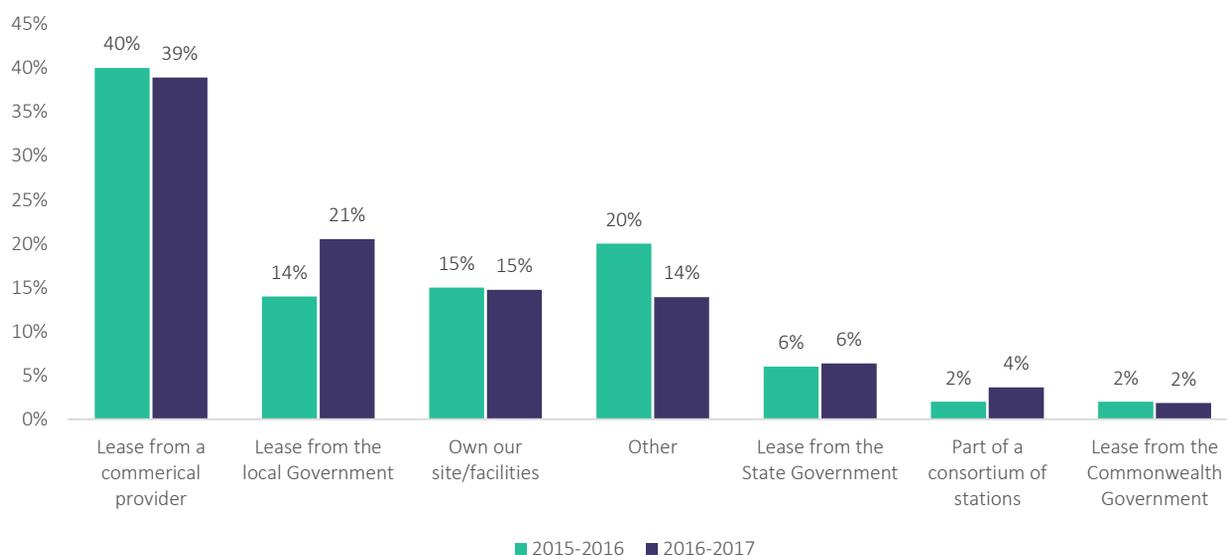
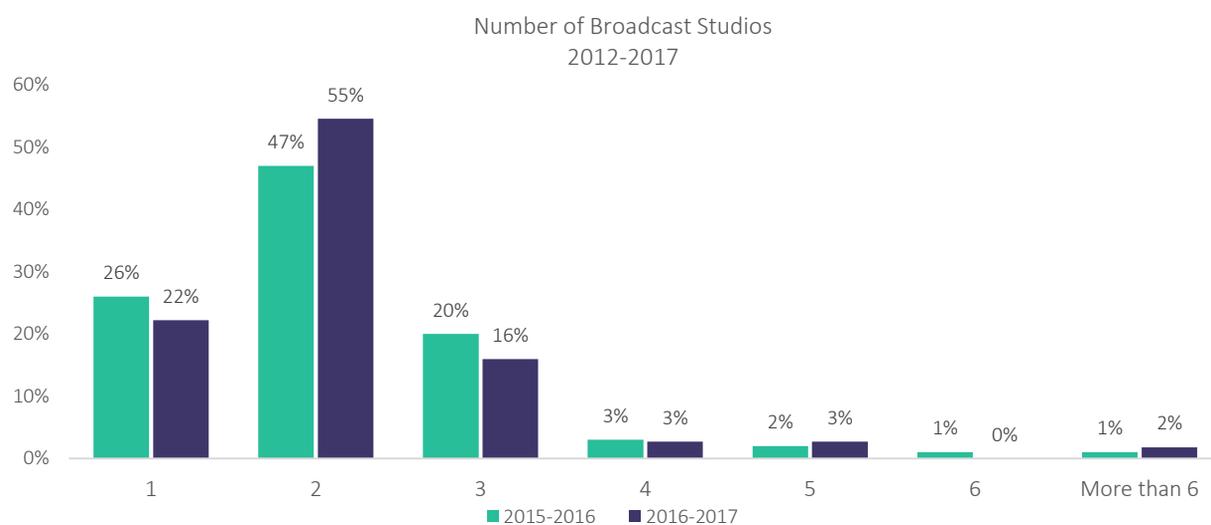|	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Lease from a commercial provider	39%	58%	47%	38%	23%
Lease from the local Government	21%	3%	21%	30%	12%
Own our site/facilities	15%	6%	5%	12%	32%
Other	14%	16%	11%	12%	18%
Lease from the State Government	6%	0%	16%	3%	12%
Part of a consortium of stations	4%	15%	0%	3%	0%
Lease from the Commonwealth Government	2%	3%	0%	2%	3%

Q45. Does your station lease its transmission site / or transmission facilities from a third party?.

STUDIO AND PRODUCTION INFRASTRUCTURE

Like in all prior census surveys, 100% of stations have a broadcast capable studio. Over three quarters (79%) have at least two broadcast capable studios, with the average number of broadcast capable studios up from 2.13 in 2015-2016 to 2.16 in 2016-2017.

Stations serving metropolitan areas have the most broadcast capable studios. On average metropolitan based stations have 3.14 broadcast capable studios, and 28% have 4 or more.

Suburban stations have an average of 2.15 broadcast capable studios and regional stations have an average of 1.97, with approximately 20% of stations in both areas having 3 or more. Rural and remote stations have an average of 1.88 broadcast studios. Only 9% of rural and remote stations have 3 or more broadcast capable studios.

Number of Broadcast Studios 2012-2017

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
1	22%	8%	11%	31%	21%
2	55%	34%	69%	51%	69%
3	16%	30%	15%	15%	9%
4	3%	12%	5%	0%	0%
5	3%	5%	0%	4%	0%
6	0%	0%	0%	0%	0%
More than 6	2%	11%	0%	0%	0%
Mean	2.16	3.14	2.15	1.97	1.88

Q48. How many broadcast capable studios does your station have?

Production Only Studios

Stations who indicated that they had more than one broadcast capable studio (79% of stations overall) were next asked if they had any production-only studios.

66% of these stations indicated that they have a production only studio. This is up from 62% in 2015-2016. Metropolitan stations are more likely to have production only studios than stations in other areas, with a average of 1.89 each. This compares to an average of 1.08 amongst suburban stations, 1.26 amongst regional and 1.27 for rural stations.

Training Studios

13% of these stations indicated that they have training-only studios. This is up from 6% in 2015-2016.

Outside Broadcasting Facilities

Over 3,000 outside broadcasts were conducted by community radio stations nationally during 2016-2017, with approximately half of these in regional and rural areas. Reflecting this, a majority of stations (79%) have outside broadcasting capabilities. This has increased steadily over the last ten years, from 56% in 2002-2003. Outside broadcasting capabilities are available in all areas.
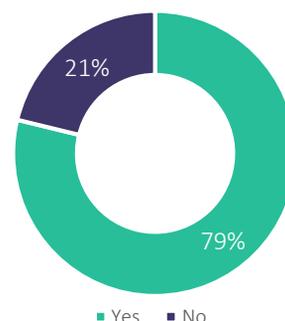
Stations with Production Only Studios 2016-2017
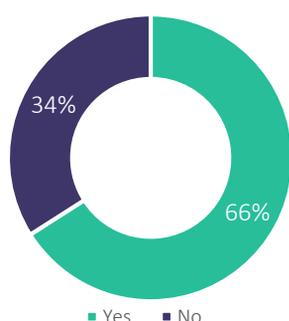
Stations with Training Only Studios 2016-2017
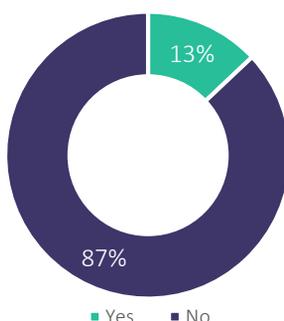
Stations with Outside Broadcasting Capabilities 2016-2017

Production Only Studios	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
% of Stations with Production Only Studios	66%	82%	68%	61%	63%
No of Production Only Studios					
1	73%	48%	92%	79%	73%
2	21%	30%	8%	17%	27%
3	3%	6%	0%	4%	0%
4	3%	15%	0%	0%	0%
Mean	1.36	1.89	1.08	1.26	1.27

Q0/51. Does your station have production only studios? How many production only studios does your station have?

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Training Only Studios	13%	14%	0%	18%	12%
Outside Broadcasting Capabilities	79%	75%	79%	79%	81%

Q52. Does your station have studios that are used solely for training purposes?
Q53. Does your station have outside broadcasting capabilities?

(Question only asked of stations with more than one broadcast studio)

Broadcast Automation & Playout Systems

Nearly all (93%) stations have a broadcast automation system, and system capabilities have improved.

78% of stations indicate that their broadcast automation system is capable of scheduling and/or automating audio file playback, while 61% report that their system maintains a log of administrative log of music and/or sponsorship information. These are up from 67% and 43% in 2015-2016 respectively.

Half of all stations (and over 60% of metropolitan and suburban stations) report that their broadcast automation system is capable of manual audio playback, up from 34% last year.

More stations than in 2015-2016 (29%) report that their broadcast automation system is capable of automated switching of physical sources (up from 22%), and can broadcast extra 'now playing' data such as text and images (20%, up from 16%).

Capabilities of Broadcast Automation Systems 2012-2017

Legend: ■ 2015-2016 ■ 2016-2017
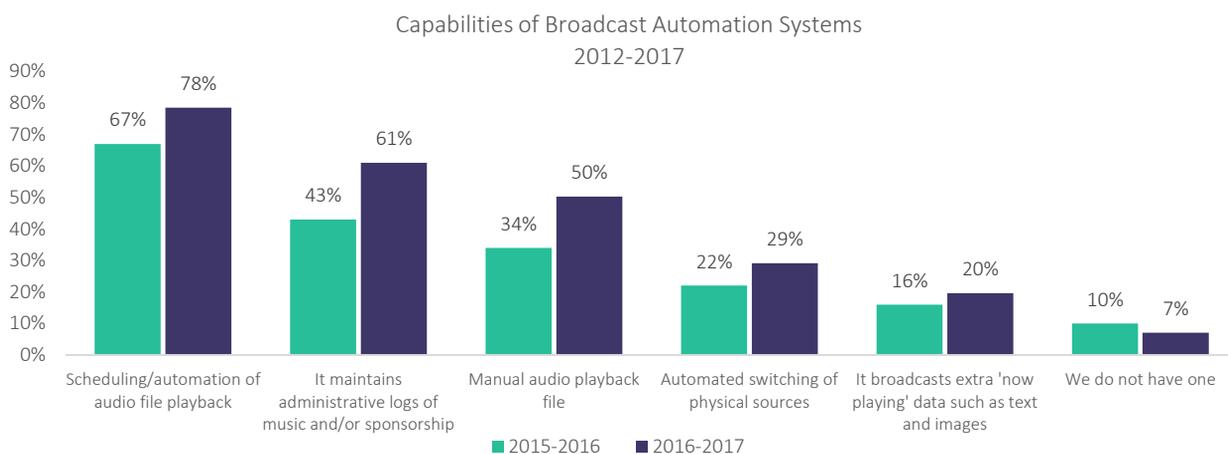
	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	156	26	20	75	35
Scheduling/automation of audio file playback	78%	76%	75%	76%	88%
Maintains administrative logs	61%	55%	64%	60%	67%
Manual audio playback file	50%	61%	63%	46%	45%
Automated switching of physical sources	29%	37%	32%	25%	30%
Broadcasts extra 'now playing' data	20%	26%	21%	19%	15%
We do not have one	7%	4%	11%	8%	6%

Playout Software	Total
Sample	156
Other	32%
Station Playlist	18%
Zara	17%
Simian	8%
Jazzler	7%
RCS	7%
MJM	5%
Raduga	3%
In House System	3%
WideOrbit	0%

Other systems used by stations included:

- Dinesat
- DRS 2006
- EBRCart
- ENCO
- mAirlist
- Netia
- OTS AV
- Radio Boss
- Radiologik
- Radioman
- Rivendell
- Wimamp

Q46. Please tell us about the capabilities of your broadcast automation system.
Q47. What is the name of the playout system software that your station uses to playout its broadcast audio?

PROGRAM EXCHANGE

Program Exchange Capability

45% of stations have systems in place to exchange programs or program material with other stations, up slightly from 41% in 2015-2016 and 35% in 2011-2012. Stations serving metropolitan areas are most likely to have systems in place to exchange programs, with 73% having the capability, up from 69%. This compares to 36% and 47% of regional and rural and remote stations respectively.
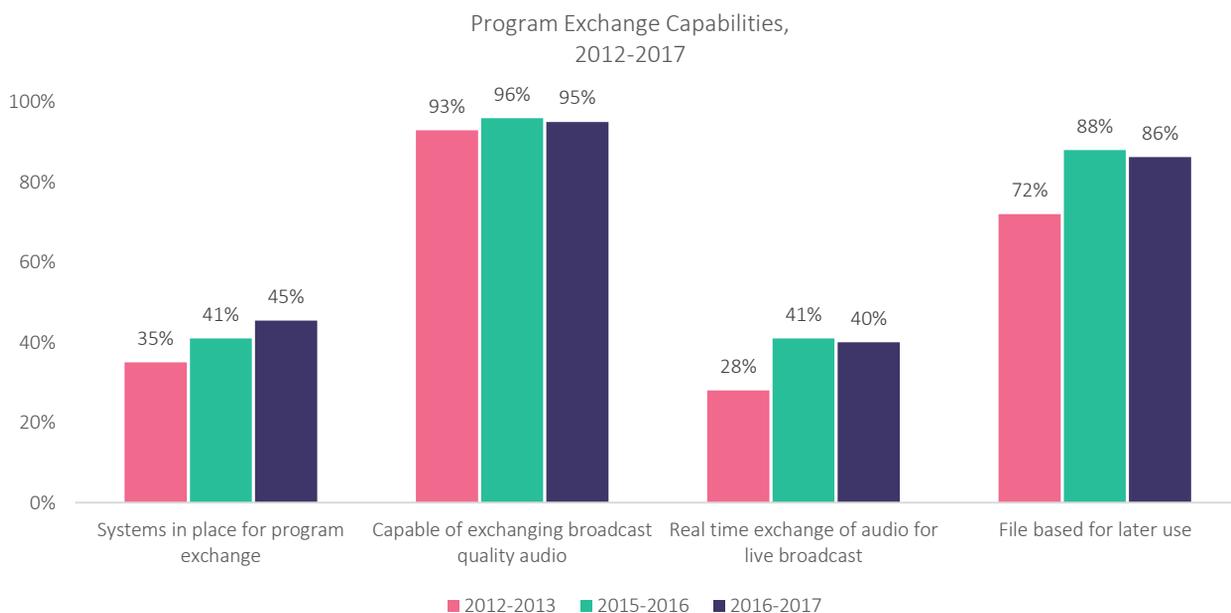
Broadcast Quality Exchange

A large majority (95%) of stations with program exchange systems are capable of broadcast quality exchange. Regional stations are slightly less likely to be capable of broadcast quality exchange (89%) than stations in other areas.

Method of Program Exchange

Of the stations that have systems in place for the exchange of programs and program material, 40% exchange audio real-time during live broadcasts. This is relatively consistent across all stations, regardless of their service area, although as in previous surveys, rural and remote stations are slightly more likely to indicate that they use real-time exchange.

86% of stations also use their exchange program to capture files for later use. This rises to 94% of metropolitan stations and 93% of rural and remote stations.

Program Exchange Capabilities, 2012-2017

Legend: ■2012-2013 ■2015-2016 ■2016-2017

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	**156**	**26**	**20**	**75**	**35**
Systems in place for program exchange	45%	73%	41%	36%	47%
Sample	**71**	**19**	**8**	**27**	**17**
Capable of exchanging broadcast quality audio	95%	98%	100%	89%	100%
Real time exchange of audio for live broadcast	40%	39%	51%	32%	49%
File based for later use	86%	94%	61%	84%	93%

Q54. Does your station have systems in place for exchange of whole programs and / or program material with other stations?
Q55. Please tell us how you use your program exchange system?
Q56 Is your system capable of exchanging broadcast quality audio?

CRN/DDN

Nearly half (49%) of all community radio stations indicate that they capture content from CRN or DDN.

Methods of CRN Capture

Consistent with 2015-2016, approximately a quarter (26%) of stations take the signal live to air from the satellite for immediate broadcast. While 18% also still capture CRN content from satellite, this has fallen from 24%. Instead, a larger proportion of stations (18%, compared to 11% in 2015-2016) use DDN's online file delivery.

CRN / DDN Use
2015-2017
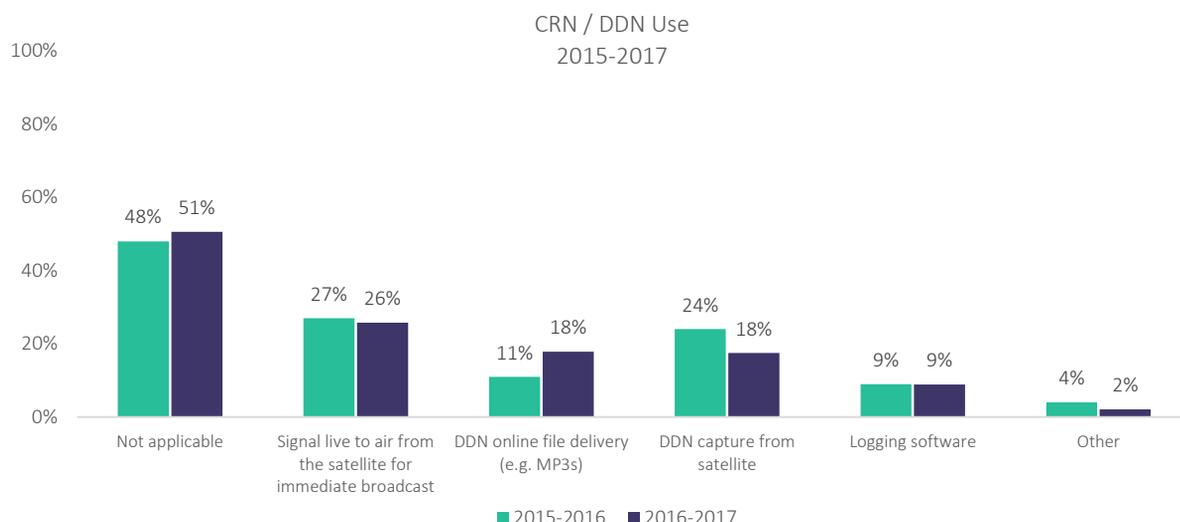
Q57. How does your station capture content from CRN/DDN?

Methods of CRN / DDN Content Replay

Of the stations that do subscribe to CRN, 53% replay the CRN content automatically via scheduling software. Metropolitan stations are more likely to replay the CRN content automatically than stations serving suburban and rural and remote areas.

Manual replay from a different computer is the next most common method, used by 18% of stations, although it is much more prevalent amongst regional stations – 26% of whom manually replay content from a different computer. A further 11% replay the content manually direct from the DDN computer, but with different software, while 5% of stations manually replay the content using the DDN playout software.

	Total	Metropolitan	Suburban	Regional	Rural & Remote
Sample	77	8	8	39	23
Automatically via scheduling software	53%	65%	57%	44%	63%
Manually from a different computer	18%	6%	0%	26%	14%
Not applicable	12%	15%	29%	9%	10%
Manually direct from the DDN computer but with different software	11%	9%	0%	12%	13%
Manually using the DDN playout software	5%	5%	14%	6%	0%
Other	1%	0%	0%	3%	0%

Q58. How do you replay the CRN / DDN content you capture?

DEFINITIONS

Location/Broadcast Area	
Metropolitan	Stations located in a state or territory capital city and licensed to broadcast metropolitan wide.
Suburban	Stations located in a state or territory capital city and licensed to broadcast to a particular suburban (or sub-metropolitan) area.
Regional	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.
Rural and Remote	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	
Educational	Stations associated with educational communities, mostly with an historical association with an university.
Ethnic	Stations broadcasting multilingual and multicultural programming.
Fine Music	Specialist music stations predominantly playing classical, jazz and new Australian compositions.
Indigenous	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.
RPH	RPH radio services broadcast published print information in an alternate format (audio) for people in Australia with a print disability.
Religious	Stations that adopt a single faith as a guiding principle in their programming and purpose.
Seniors	Stations that broadcast primarily for older Australians, often including an emphasis on music from the 1940s to 1960s.
Youth	Stations providing content primarily for young Australians, independent and unpublished music and community information and relevant discussion for youth.

CONTACT

Survey Matters specialise in providing research services to associations and not-for-profit organisations, their customers, and members.

Survey Matters have helped a wide range of associations understand their value proposition - what is important to members, how the association can help them and how satisfied they are with their associations' performance. We also work with associations to generate and build industry data and knowledge to support advocacy, promotion, industry development and marketing activities.

As authors of the Associations Matter Research Series, Survey Matters have a significant knowledge base of the Australasian association sector.

Survey Matters is a member of the Australian Market and Social Research Society.

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