

STATE OF THE COMMUNITY RADIO SECTOR

JUNE 2021

WELCOME THE STATE OF THE COMMUNITY RADIO SECTOR REPORT

MARCH 2021

Community broadcasting is Australia's largest independent media sector that continues to provide access to local news, music, information and opportunities.

The Community Broadcasting Association of Australia (CBAA) produces the State of the Radio Sector Report annually to provide insights into the sector's people, broadcasts and listeners. It shows the sector's important contribution to the diversity, inclusiveness and social cohesion that characterises Australia's open society and reinforces its business vibrancy by:



Community radio current challenges

- Funding and financial viability
- Volunteer recruitment
- Technical support, and broadcast and studio infrastructure
- Board and governance¹

Community radio current state of play



Deeply Engaged Community

Members, supporters and subscribers are the lifeblood of many community radio stations. They are the voice of the community they represent, and provide purpose for the station to broadcast. They are also the listeners and many of them also the volunteers.

Most community radio stations rely on volunteers. It's therefore vital to understand why they become involved and why they want to stay⁵.

**VOLUNTEER
GROWTH
IS TRENDING
UP**

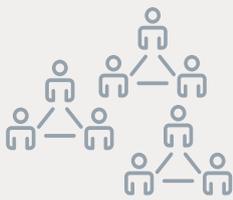
22,222
(2018-2019) 

12% increase over the past 10 years

Community radio stations sometimes employ a mix of full and part-time staff in addition to the volunteers that assist with the operations and governance of the station⁷.



688 FULL-TIME
EQUIVALENT (FTE)
EMPLOYED



918,000

OF THE AUSTRALIAN POPULATION
LISTEN EXCLUSIVELY TO COMMUNITY RADIO.



14.7 HOURS⁹
AVERAGE HOURS
A WEEK SPENT
LISTENING TO
COMMUNITY RADIO

Station subscriber/
supporters and member
retention rates remain
high⁶.

84%
RETENTION 

61%
IN 2017 

29%

OF THE AUSTRALIAN
POPULATION LISTEN TO
COMMUNITY RADIO WEEKLY⁸.

1.5

MILLION
AUSTRALIANS 

LISTEN TO COMMUNITY RADIO
BUT NOT COMMERCIAL RADIO
(THAT IS 1/4 OF COMMUNITY
RADIO LISTENERS!)

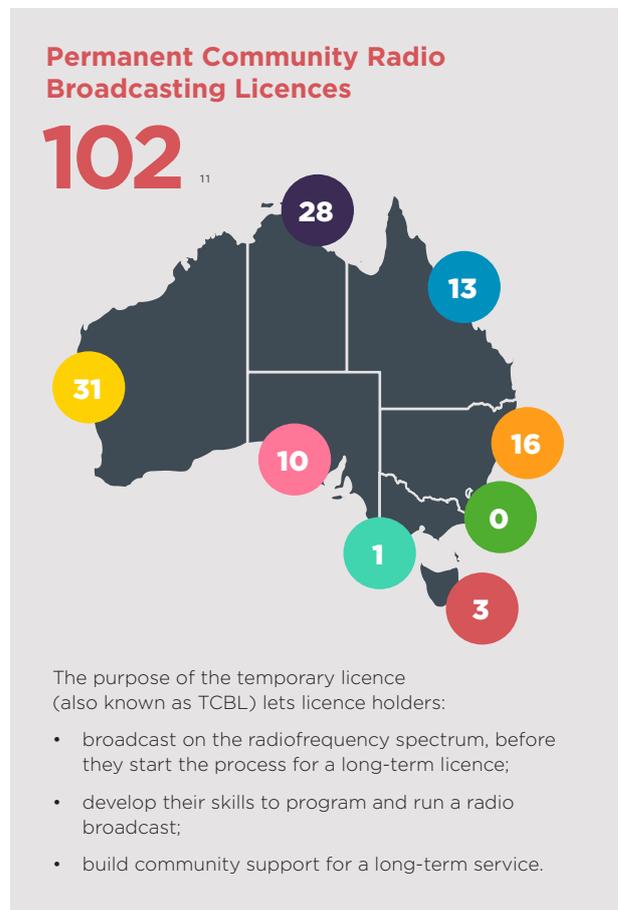
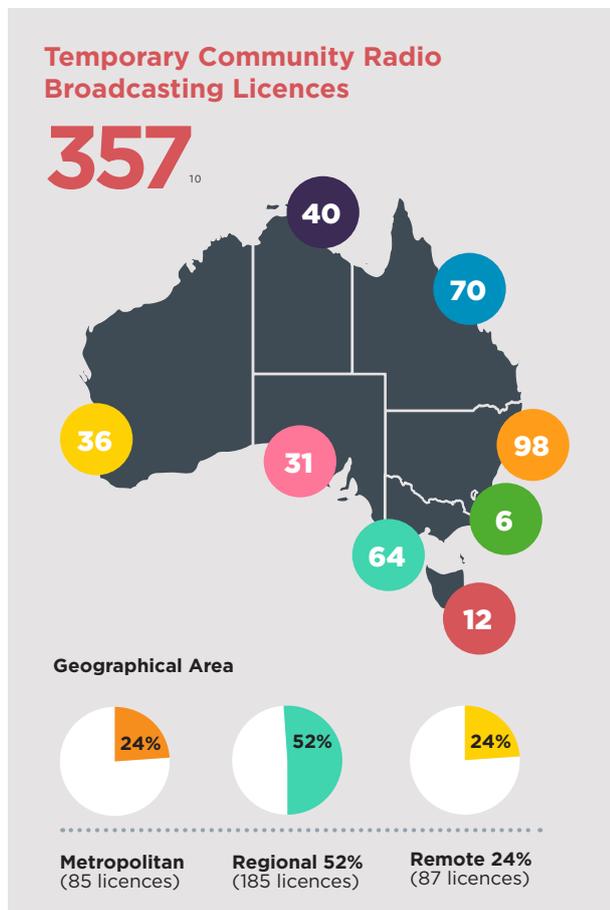
What are Community Radio Stations?

Across the country the national community radio audience listens to services that contribute to and reflect Australia's open society, strong democracy and vibrant culture by:

1. Sharing a diverse range of viewpoints that enrich the social and cultural fabric of Australian society and contribute to public interest outcomes;
2. Promoting the identities of local communities and contribute to social cohesion and inclusion;
3. Providing opportunities for participation in free-to-air broadcasting and content production;
4. Contributing to media diversity;
5. Generating a high level of local content; and
6. Providing a unique range of services and programs.

What makes a station 'community'?

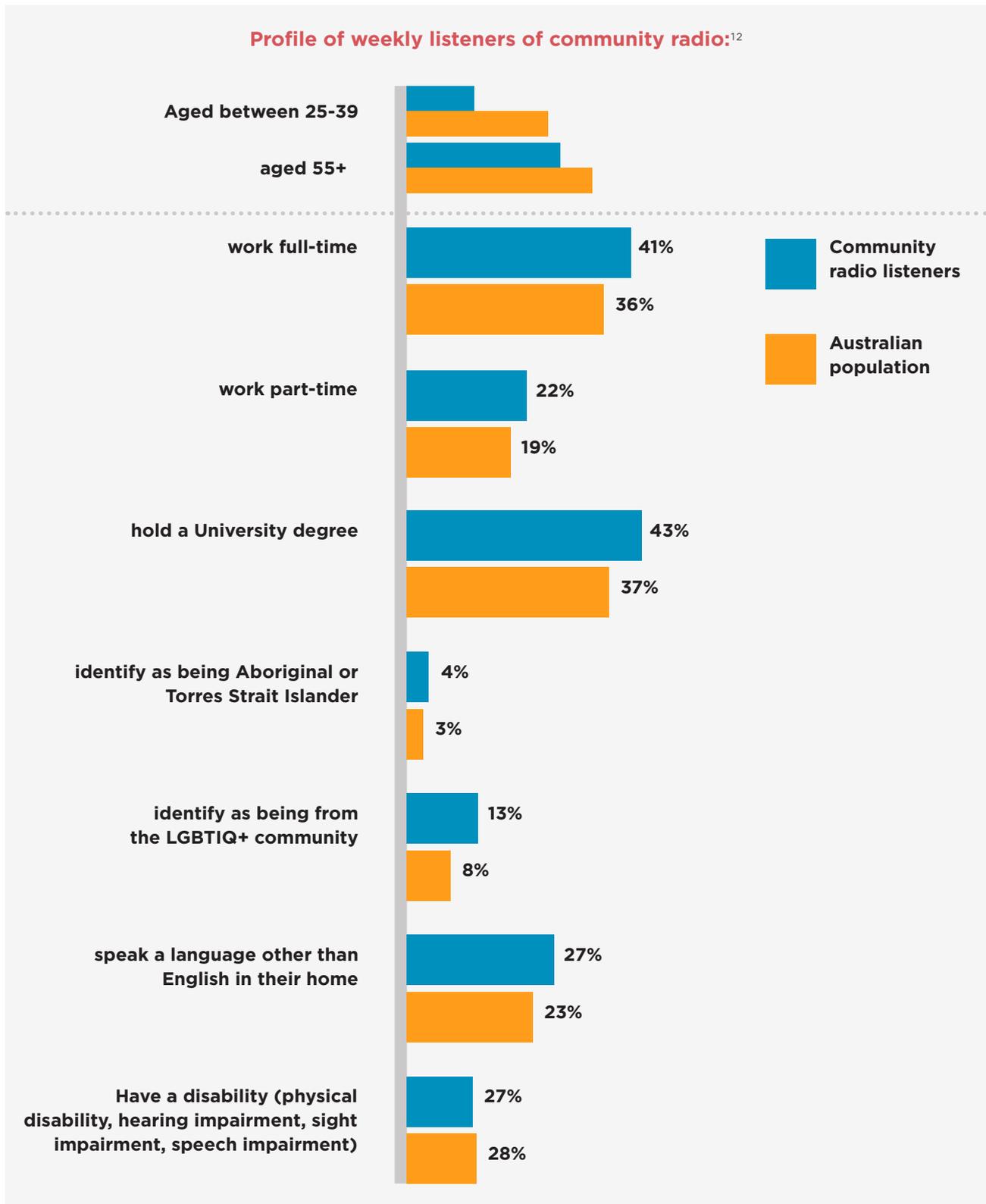
Community broadcasters are licensed under the Broadcasting Services Act 1992 ('the Act') and regulated by the Australian Communications and Media Authority (ACMA). Licence applications and renewals are merit-based and assessed on the basis of an organisation's not-for-profit status and its capacity to meet the needs and interests of the community that station serves. Their communities of interest cover general geographic areas, as well as stations servicing First Nations (Indigenous), culturally and linguistically diverse (ethnic), religious, educational, LGBTQ+, print disability (RHP Radio Reading), youth, seniors and special music communities.



Passionate Listeners

Community radio has a broad reach across many different demographic groups, reflecting and relative to the Australian population. This profile has remained consistent with only slight variation over the years.

THE DIVERSE AUDIENCES



CASE STUDY

WILCANNIA RADIO

Wilcannia is a small town located within the central darling shire in north western New South Wales. Wilcannia River Radio (FM 103.1) provides a voice for the community and is a service where local information can be communicated.

The station is broadcasting great live and local content to Wilcannia and surrounds, but their commitment to the community extends far beyond this. In recent years, the volunteers of the community radio station have gone above and beyond in servicing the local community.

“...the station has become a crucial source of information and community spirit during the COVID-19 crisis.

The radio station has taken on the responsibility of being a key distributor of official information during the pandemic, providing details on important updates and health warnings.

They have been engaging with local authorities and organisations, to help raise questions and concerns from the community, while connecting people with the services they need during this time.”

Wilcannia River Radio’s role in its community, in 2019 the station was awarded the *Tony Staley Award for Excellence in Community Radio*.



Wilcannia River Radio (FM 103.1)

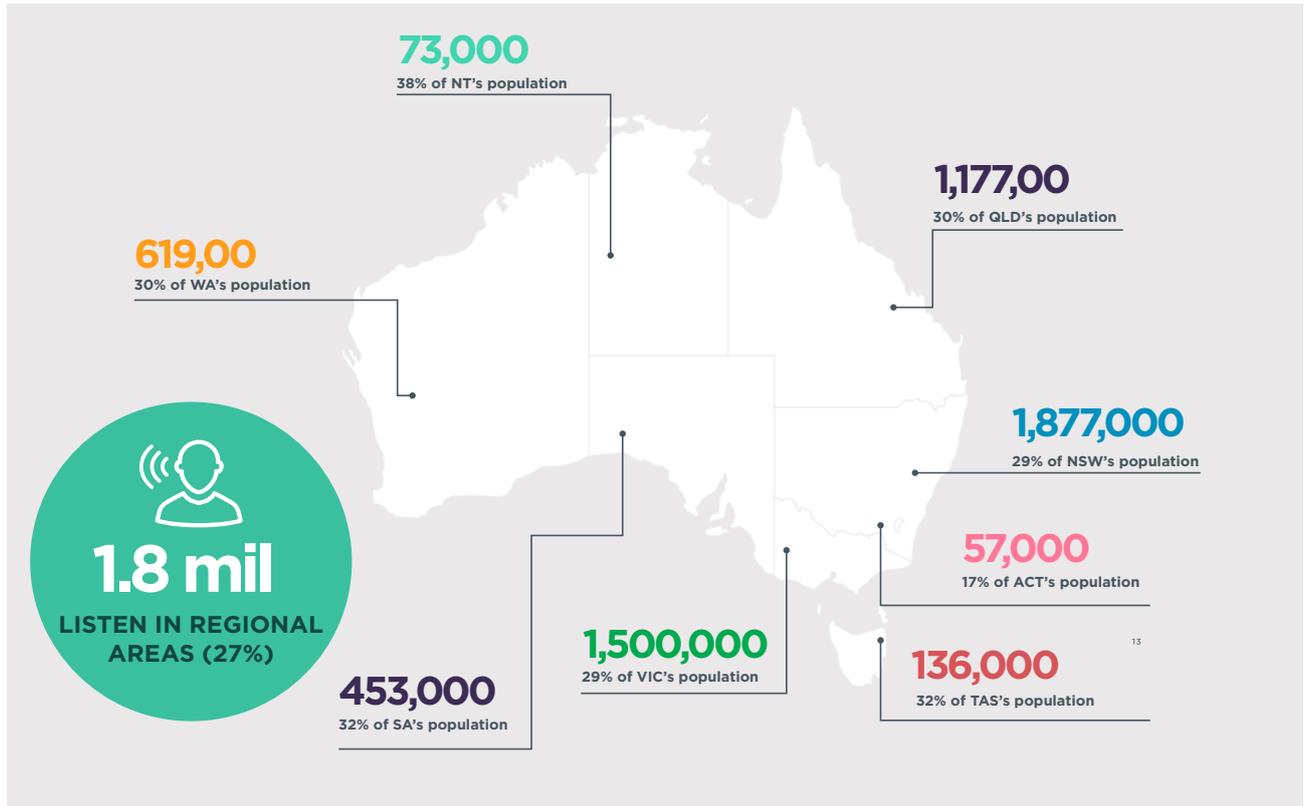
“

We also have provided opportunities for our youth like facilitating the 2017 and 2018 Nations of Origin where our kids represent their proud Barkindji nation and identity playing various sports against other NSW Traditional Nations.”

Community Radio Reaches Far and Wide

Community radio helps connect those passionate listeners particularly living in remote and regional areas and helps overcome feelings of social isolation. Community radio stations are embedded in these communities and provide access to information that is relevant and timely for listeners.

The Northern Territory has the highest percentage of community radio listeners per capita than any other state or territory in Australia. It's clear that community radio is crucial to those wishing to stay connected in the Northern Territory's remote communities as 38% of NT's population tunes in.



CASE STUDY

LOCAL MUSIC

“What makes an Australian music show on community radio so important? Australian musicians are connected to their communities, cities and landscape, and know how to tell stories in a quintessentially Australian, funny, whimsical and sometimes sardonic way. I have great faith in local music precisely because I think Australian musicians know how to translate the ‘particular’ aspect of their experience into ‘universal’ storytelling. In broadcasting, this encourages a much-needed free exchange of knowledge amongst human beings and I believe this is ultimately at the very basis of the politics of compassion and empathy.”



Firas Massouh,
Music Director
from Melbourne's
PBS.



I have great faith in local music precisely because I think Australian musicians know how to translate the ‘particular’ aspect of their experience into ‘universal’ storytelling. ”

Diverse Audience and Content



OF LISTENERS 15+ LISTEN TO COMMUNITY RADIO IN AN AVERAGE WEEK BECAUSE THEY PLAY AUSTRALIAN MUSIC AND SUPPORT LOCAL ARTISTS. ¹⁴



PER WEEK/15,609 HOURS IN TOTAL OF AUSTRALIAN MUSIC BROADCASTING EACH WEEK ACROSS STATIONS COLLECTIVELY. ¹⁵

National Training Program

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 and training delivered at conferences, via partnerships, through mentorships and scholarships.

One in two stations indicated need for training for their staff and volunteers, particularly in the technical, sponsorship sales, production and programming areas. Face-to-face training remains the most popular, although there is also support for online and webinar resources¹⁶.

As the national training organisation for community broadcasters around Australia, the Community Media Training Organisation is responsible for the delivery of the National Training Program. Enhanced Government funding has enabled them to deliver a new program of activity that targets the development of business, leadership, management and social enterprise skills for participants in the community broadcasting sector.

In 2018-2019, the Community Media Training Organisation delivered training to 1,499 community media volunteers and/or workers across 321 community media stations and organisations. 70% of stations that received training were in rural, regional and remote locations¹⁷.





Pictured above, 4EB
Jeff Milne. Left: Valley
FM studio.

Delivering Radio Through Multiplatforms

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 share content for broadcast.

DAB+ digital radio was introduced in Australia in 2009, and the inclusion of community radio broadcasters within Federal Government funding support for infrastructure and transmission was a milestone for the sector. Sector leadership and planning ensured that community services would be a part of the digital radio framework, increasing the diversity of services available on free-to-air radio platforms and weaving community radio into the fabric of the Australian DAB+ landscape.

Digital radio sits alongside AM and FM (analogue) as an alternative radio transmission platform. Like analogue radio, it is broadcast on a free-to-air basis over the airwaves. Digital radio does this via DAB+ technology. Digital radio is future facing and is a vital element in Australian's multiplatform media environment. A positive transition to digitisation is well underway, with 30.4% of all radio listening (where DAB+ is available) happening via digital radio¹⁸.



Technology²⁰

Transmission

The majority of stations rent their transmission facilities from a commercial provider

39%

or from local government

21%



15%

of stations own their transmission site/facilities

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 at least two broadcast capable studios.

Metropolitan stations
average 3.14
broadcast studios

Suburban stations
average 2.15
broadcast studios



Regional stations
average 1.97
broadcast studios

Rural stations
average 1.88
broadcast 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.

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). 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.

Financial Sustainability

Consistent with previous years, financial viability was the highest ranked challenge across the sector with 42% of CBAA members indicating financial viability as their number one issue, up from 37% in 2018²¹.

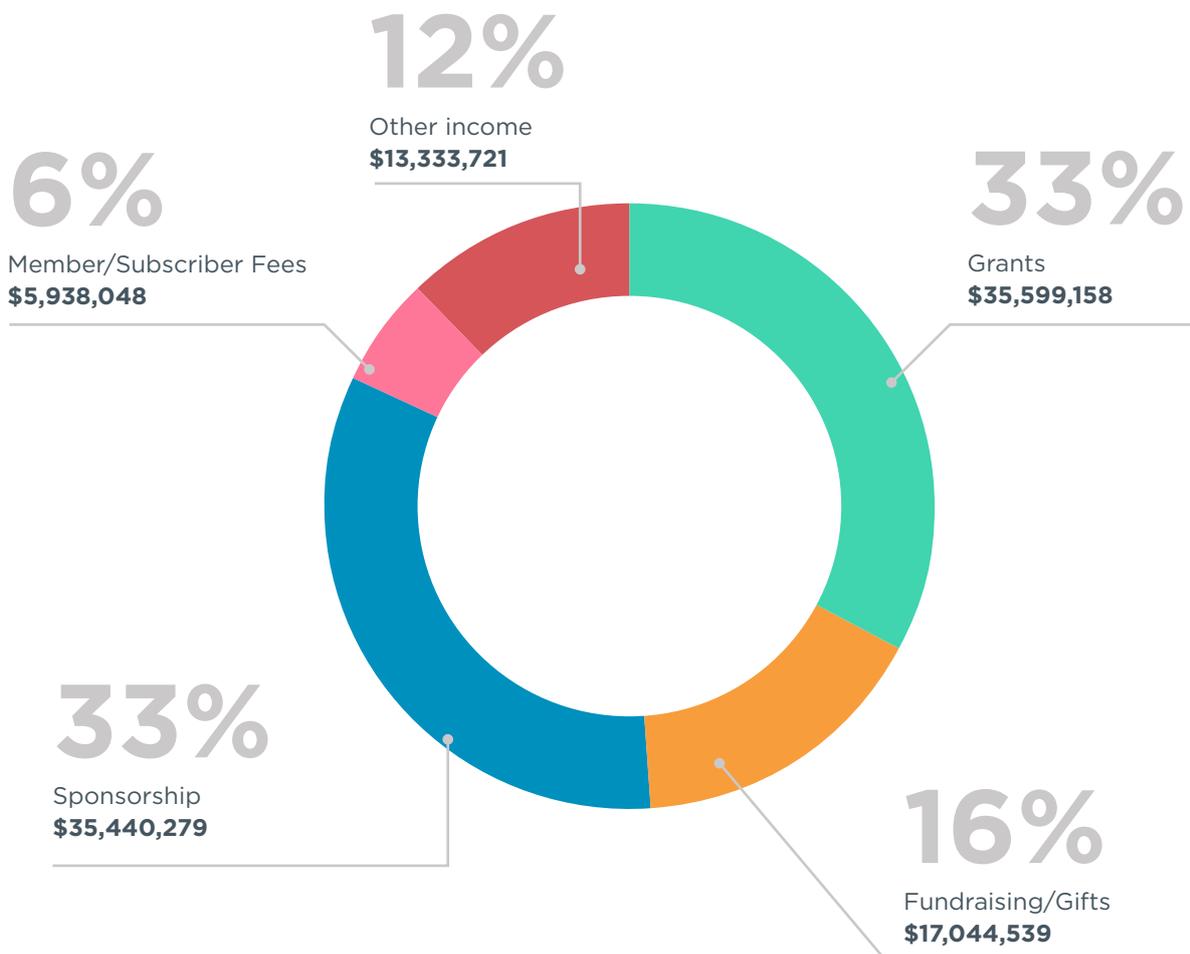
Sector Income

In 2017-2018, the community radio sector generated income of more than \$107 million. This is up 12% from 2016-2017²².

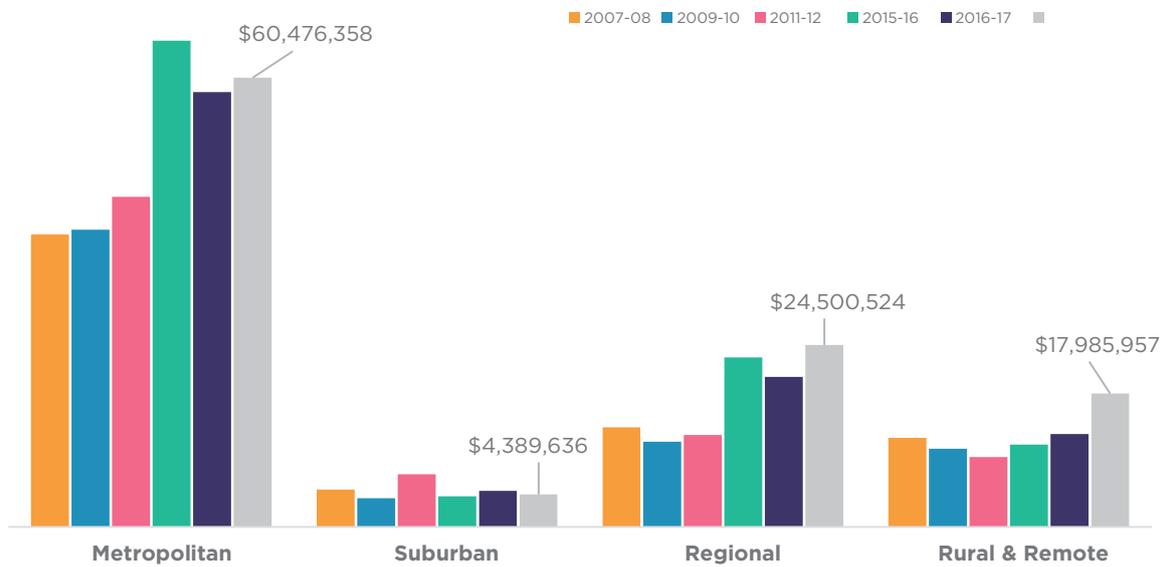
While the sector as a whole generated higher income in 2017-2018 compared with 2016-2017, some areas fared much better than others. Income reported by rural/remote and regional stations increased by 44% and 22% respectively. This was primarily due to an increase in government grants in these locations. Conversely, suburban stations reported a revenue decline of 10% in 2017-2018.

Community radio stations raise revenue through a variety of sources (proportion of income by source 2016-2017 vs 2017-2018):

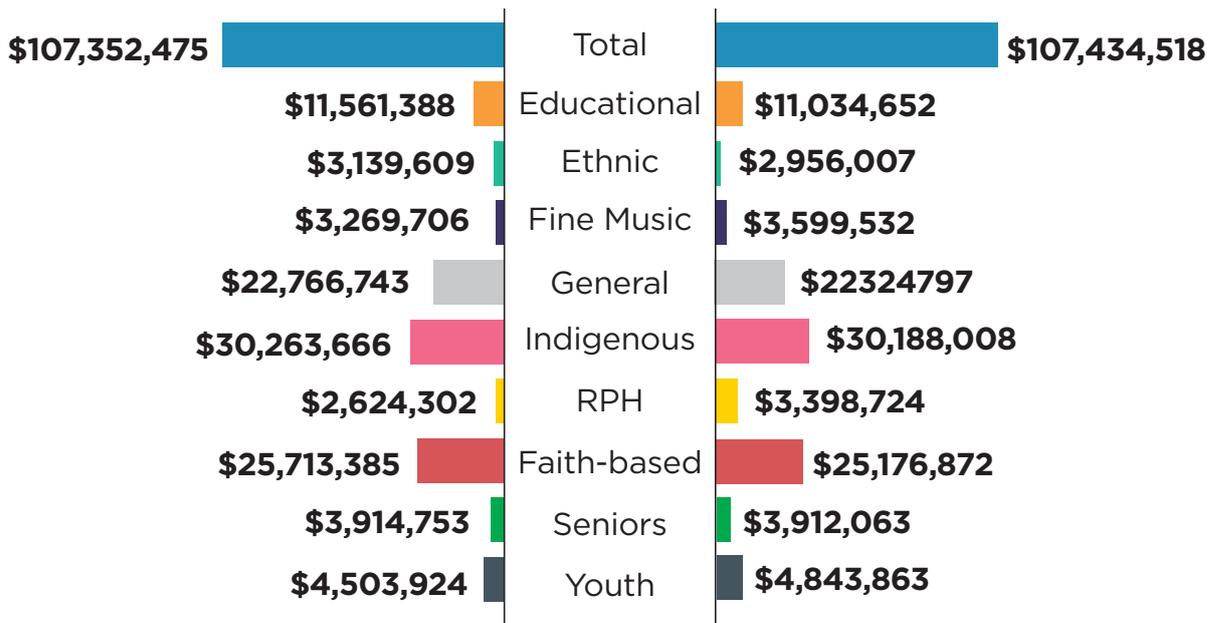
Proportion of income by source



Income by location, 2007-08 to 2017-18



Total income by community interest 2017-18



Definitions

Geographical 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 Interest	
Educational	Stations associated with educational communities, mostly with an historical association with a university.
Ethnic	Stations broadcasting multilingual and multicultural programming.
Fine Music	Specialist music stations predominantly playing classical, jazz and new Australian compositions.
General	Stations that broadcast to all community interests in their local area.
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.
LGBTIQ+	Stations that service the LGBTIQ+ community, and broadcast information, talks and specialist content that meets community need.
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.

Organisations contributing data and research to this report:

Australian Communications and Media Authority (ACMA)
Community Broadcasting Association of Australia (CBAA)
Community Media Training Organisation (CMTO)

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22. As above



COMMUNITY
BROADCASTING
ASSOCIATION OF
AUSTRALIA

Phone: 02 9310 2999

Fax: 02 9319 4545

Email: office@cbaa.org.au

Street Addresses:

Level 3

44-54 Botany Road
Alexandria NSW 2015

Postal address:

PO Box 564, Alexandria NSW 1435.