



**COMMUNITY BROADCASTING DATABASE:
SURVEY OF THE COMMUNITY RADIO SECTOR**

2007-08

FINANCIAL PERIOD

PUBLIC RELEASE REPORT

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Introduction

This report provides an analysis of data collected for the Community Broadcasting Database (CBD) by the CBOOnline Project from community radio broadcasting licensees that were fully licensed and operating at 30 June 2008. ¹The data was collected between March and June 2009 using an online survey.

This is the fifth CBD data collection to be undertaken by the CBOOnline Project. Previous data collections were held in 2003, 2004, 2005 and 2007. All surveys have been funded by the Community Broadcasting Foundation (CBF), an independent non-profit funding agency for community broadcasting services in Australia, which is committed to an ongoing research program for the sector. The CBOOnline Project is managed by the Community Broadcasting Association of Australia (CBAA).

This report provides detailed aggregated information on key aspects of the community radio broadcasting sector (the sector) including details about programming, program sources, finances, staffing, volunteers, subscribers, sponsorship, training and technology for the 2007-08 financial year plus comparisons with data from the previous CBD collections. An outline of the survey methodology approach to data analysis is provided along with detailed statistical tables and graphs with breakdowns of results by specialist broadcasting category and geographic location. The report was prepared by CBOOnline Manager, Dr. Wendy Coates.

Overview of the community broadcasting sector

Australia boasts one of the most mature and vibrant community broadcasting sectors in the world, emerging from grass-roots action in the early 1970s to become an important and distinctive part of Australian media as one of a number of broadcasting sectors: national (ABC and SBS), commercial, subscription and community.

Subject to the provisions of the *Broadcasting Services Act 1992*, and guided by the Codes of Practice² community broadcast stations operate as independent not-for-profit organisations which actively encourage access and participation by members of their communities in all aspects of broadcast operations; emphasise the provision of access to groups that are inadequately served by mainstream media; enhance the diversity of programming choices and viewpoints available to their audiences; and support and develop local and Australian arts, music and culture.

Community radio stations vary enormously depending on the needs and interests of the local geographic communities and/or the specific communities of interest they serve – including youth, senior citizens, arts, fine music, education, Australian music, sport and other specialist interests, as well as providing specific services for Indigenous, religious, print handicapped and ethnic communities. There are stations all over the country, some with metropolitan wide licences (18%), others that service particular areas of a city (sub-metro or suburban licences) (16%), some in regional (41%) and rural areas (25%), and many in remote locations³.

¹ Note: these statistics do not cover the operations of temporary community broadcasting licensees, Remote Indigenous Broadcasting Services (RIBS) or community television stations.

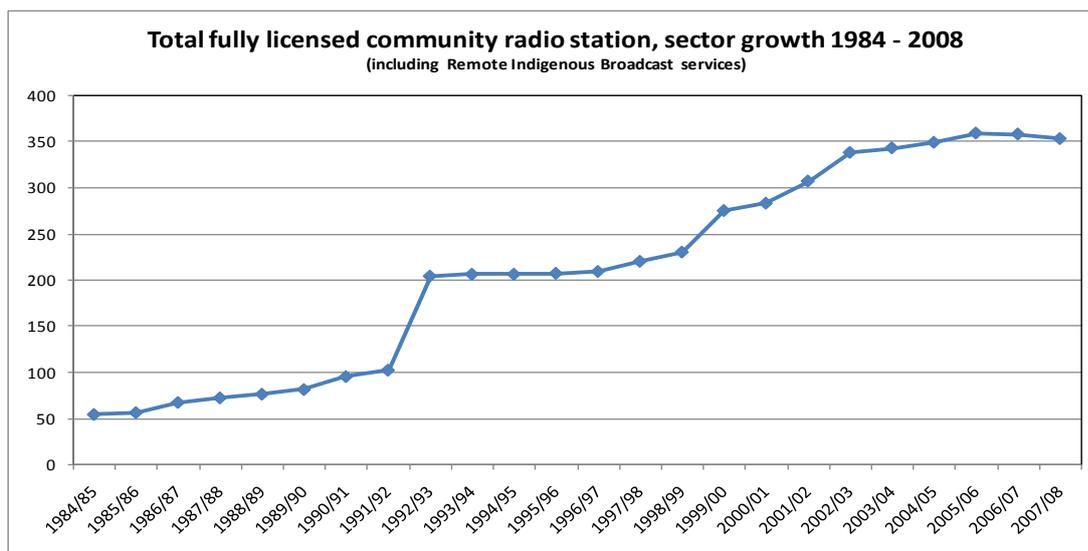
² Community Broadcasting Association of Australia, Radio and Television – Codes of Practice, available from <<http://www.cbaa.org.au/content.php/16.html>>.

³ Station percentages refer to the 277 fully licensed and operating community radio stations at June 30 2008, as represented by the current CBD results. They do not include Remote Indigenous Broadcast Services licensees, stations with temporary radio licences, or community television stations.

The diversity of program content and emphasis on minority access exhibited by most community broadcasting stations prevents the development of mass audiences; however, recent research indicates that collectively the sector has significant audience reach. According to the latest research, in an average month 57% of Australians over 15 years of age listen to community radio – an estimated audience of 9.5 million people⁴.

The 2007 national qualitative study into sector audiences by Griffith University found that people tuning into metropolitan and regional stations valued the provision of local news and information and appreciated the diversity of programming, including that of specialist music formats. The research showed that audiences liked the laid back, ‘ordinary person’ station presentation style and perceived community radio to be accessible and approachable⁵.

While community broadcasting experienced a period of sustained growth from its inception over three decades ago, with the number of stations trebling since the early nineties, station numbers began to level out after 2002, peaking in 2006 and have contracted slightly in 2008. In 2009, there are 350⁶ fully licensed community radio stations, (including 78 servicing remote Indigenous areas) and 96⁷ temporary community radio broadcasting licences; plus 81⁸ community television broadcasting licensees, including permanent community television licences in three capital cities and 78 TV licences for remote Indigenous broadcasting services. There are also two trial TV licences located in regional areas.



The large number of temporary community radio services currently operating and the expected establishment of up to a further thirty-seven free-to-air digital community radio services in 2010 suggests that a further surge in sector growth will occur in the next few years.

⁴ McNair Ingenuity, *Community Radio National Listener Survey*, July 2008. This report is available from the CBOonline website: <<http://www.cbonline.org.au/index.cfm?pagelD=44,0,1,0>>

⁵ Michael Meadows, Susan Forde, Jacqui Ewart & Kerry Foxwell, *Community Media Matters: An Audience Study of the Australian Community Broadcasting Sector*, Griffith University Press, March 2007. This report is available from the CBOonline website: <<http://www.cbonline.org.au/index.cfm?pagelD=51,0,1,0>>

⁶ Australian Communications and Media Authority, *LIC031 Community Radio Broadcasting Licences*, 20 April, 2009

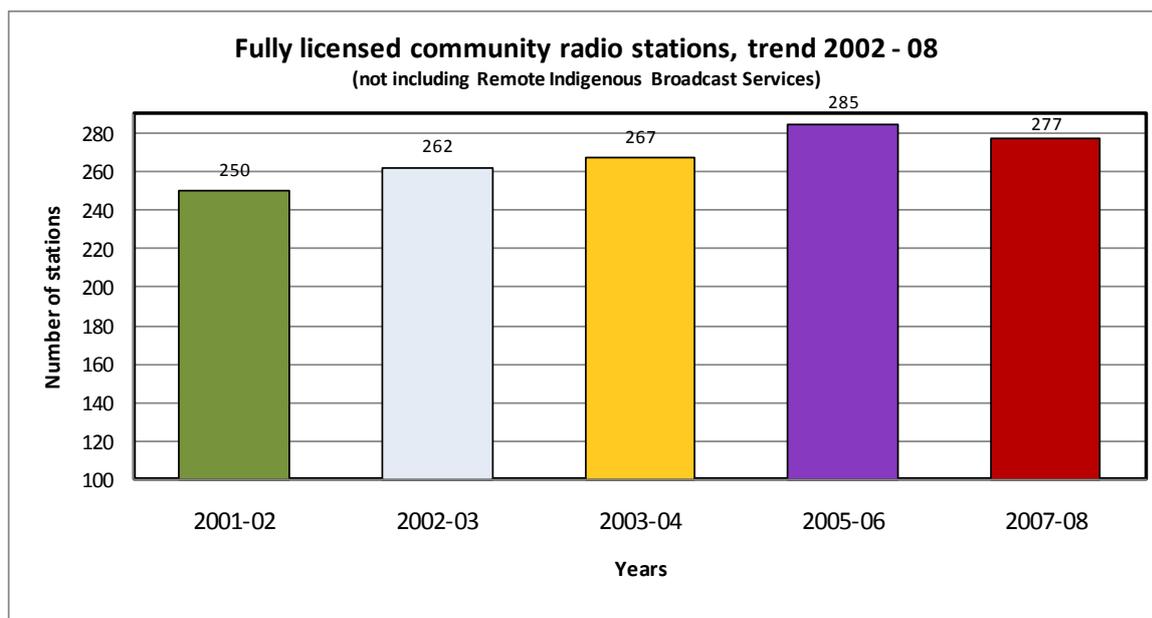
⁷ Australian Communications and Media Authority, *LIC027 Current Temporary Community Broadcasting Licences*, 1 July, 2009.

⁸ Australian Communications and Media Authority, *LIC032 Community TV Broadcasting Licences*, 5 August, 2009.

Main findings

Sector numbers

The number of fully licensed community radio stations in Australia has levelled out in recent years, decreasing slightly between 2006 and 2008. As of June 2008, there were a total of 277 fully licensed community radio stations (not including the Remote Indigenous Broadcasting Services), eight less stations than for the same time in 2007.



Audience research

Community radio stations are increasingly taking responsibility for developing a better understanding of their audiences.

- In 2007-08 survey, 46% of all stations reported that they either commissioned or subscribed to audience measurement surveys in their service areas. This was an increase of 12 percentage points on 2005-06 when 34% of stations reported undertaking their own audience research.
- Stations with higher incomes conducted the most audience research: 64% of stations earning more than \$500k annually conducted some form of audience research, while 43% of stations earning under \$500,000 surveyed their audience.
- Stations serving religious interests also reported a higher level of audience surveys, with 61% commissioning surveys.

Broadcast hours

Community broadcasters provide radio services to their communities on a continuous basis with most stations on-air 24 hours a day, seven days a week.

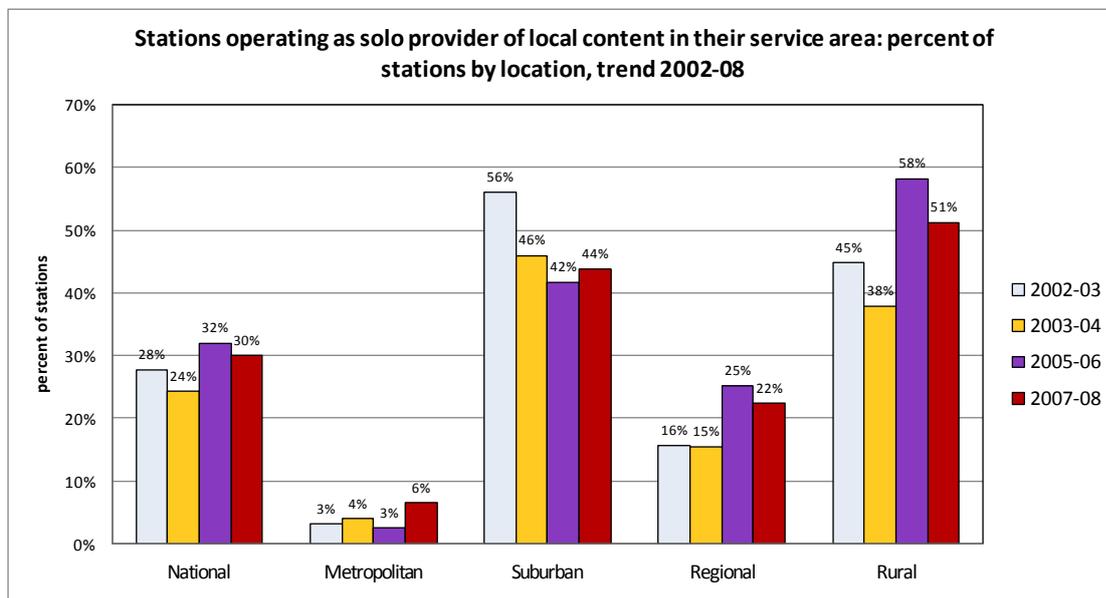
- Almost 100% of stations broadcast for 168 hours a week.

- Community broadcasters provided an average of 46,456 hours of programming every week.

Local content – solo providers

Community radio stations are the only source of local content in many areas.

- Eighty-two or almost one third (30%) of all community radio stations are the only broadcaster producing local programming in their local service area.
- In rural areas, community radio plays a significant role in the provision of local content, with half of all rural community radio stations (51%) the only provider of local content to their areas.
- Nationally, the percent of stations that operate as the solo provider of content in their area has decreased by 2 percentage points since 2005-06.



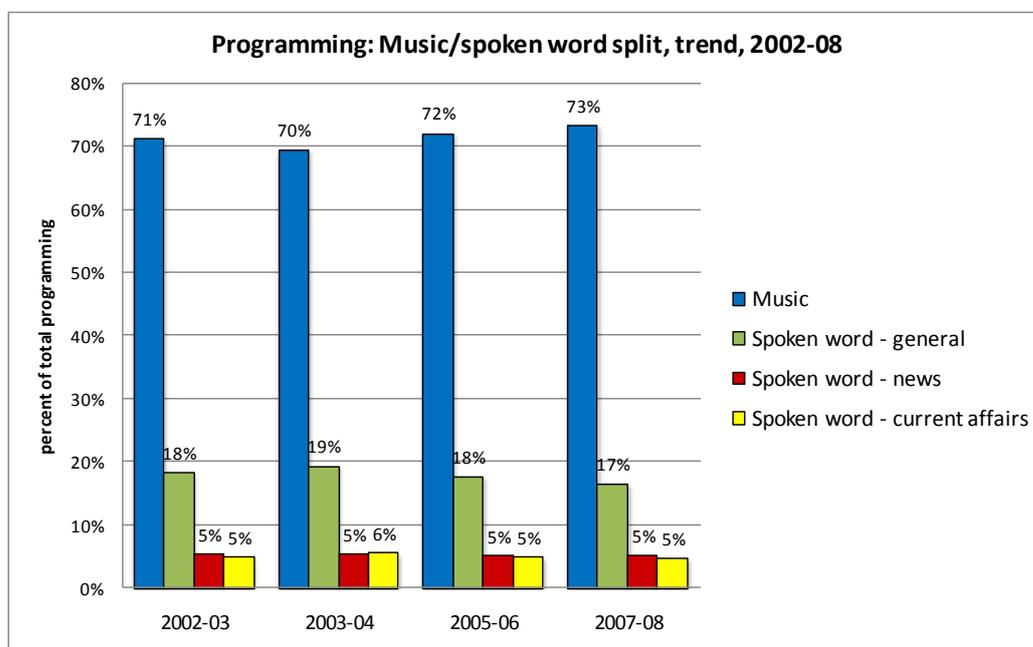
- During 2007-08, community radio stations broadcast an average of 129 hours of local content in an average week, or 77% of total content. This is significantly higher than the local content obligation for commercial regional radio licensees, legislated at 3 hours a day⁹.
- While the amount of local content broadcast by community radio stations remained high across the sector there was some variation in local content hours across different locations: suburban station broadcast the highest number of local hours with an average of 144 hours per week (86% of total broadcast hours); metropolitan stations broadcast an average of 141 hours (84%), followed by rural stations with 125 hours (74%) and regional stations with 122 hours (73%).

⁹ Australian Communications and media Authority, *Local Content Protections: Rural and Regional Radio*, sourced November 2007 from <http://www.acma.gov.au/WEB/STANDARD/1001/pc=PC_101011>

Programming: spoken word and music mix

Community broadcasters provide a mix of music and information for the communities they serve.

- Nationally, music programming accounted for most (73%) of what community broadcasters put to air, increasing from 70% in 2003-04.

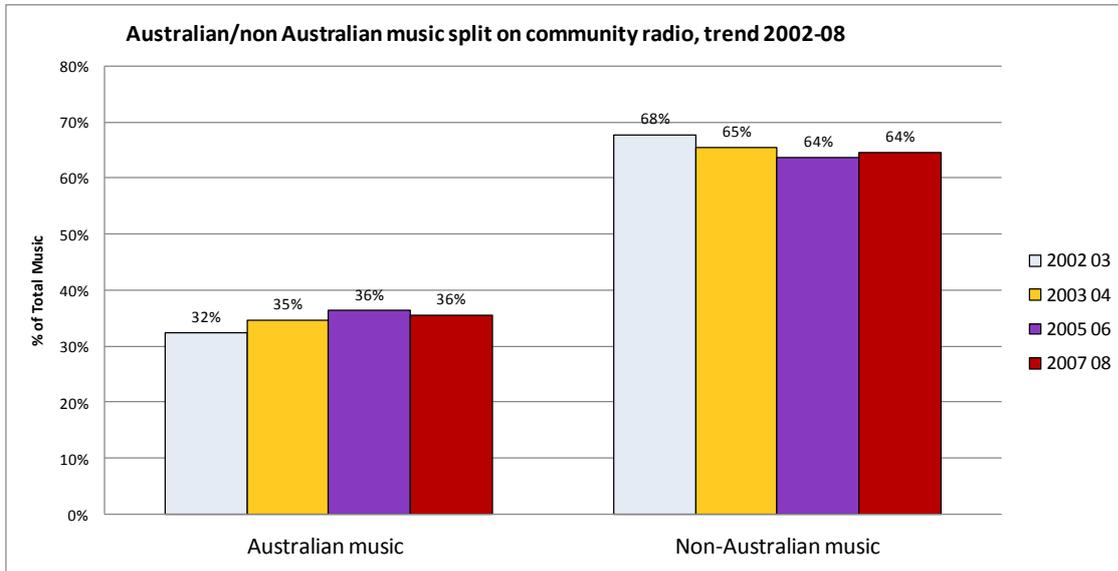


- Stations broadcast an average of 123 hours of music programming every week, an increase of two hours from the previous survey period (121 hours)
- In conjunction with music, the sector offers a diverse range of information: nationally, 27% of all program content was talks based (inclusive of general talks, news and current affairs programs).
- Almost all stations (98%) broadcast general spoken word programming; 93% of stations broadcast news bulletins; and 69% of stations provided current affairs programming.
- The makeup of programming varied considerably between stations serving different specialist communities. While the national average for general spoken word was 28 hours a week, ethnic stations provided an extensive 77 hours and RPH stations broadcast 59 hours. This was followed by religious stations (35 hours), youth (30) general (24), Indigenous (24), seniors (10) and fine music (3).
- The national average for news content was 9 hours a week. However RPH stations broadcast considerably more with an average of 46 hours, followed by ethnic stations with an average of 18 hours a week.

Australian music content

Community broadcasters play a very important role in supporting local talent and the development of local culture, providing strong support for the Australian music Industry.

- The sector's Code of Practice for radio sets a quota of 25% Australian music with exceptions for ethnic and fine music broadcasters who have a quota of 10%. Again in 2007-08 the sector has exceeded its minimum quotas for Australian music with average of 36%.



- During the 2007-08 period, a total of 12,105 hours of Australian music was broadcast weekly on community radio stations, equal to 629,460 hours over the twelve month period.
- Nationally, stations broadcast an average of 44 hours of Australian music every week. Some categories of stations consistently exceed this average, in particular Indigenous stations which averaged 69 hours during the survey period, and youth stations which averaged 57 hours.
- Stations located in rural areas broadcast the highest level of Australian music, averaging 51 hours a week, which is 7 hours more than the national average.
- Nationally, between 2002 and 2008 the average hours of Australian music broadcast by community radio stations has increased from 39 to 44 hours a week (a 12.8% increase).

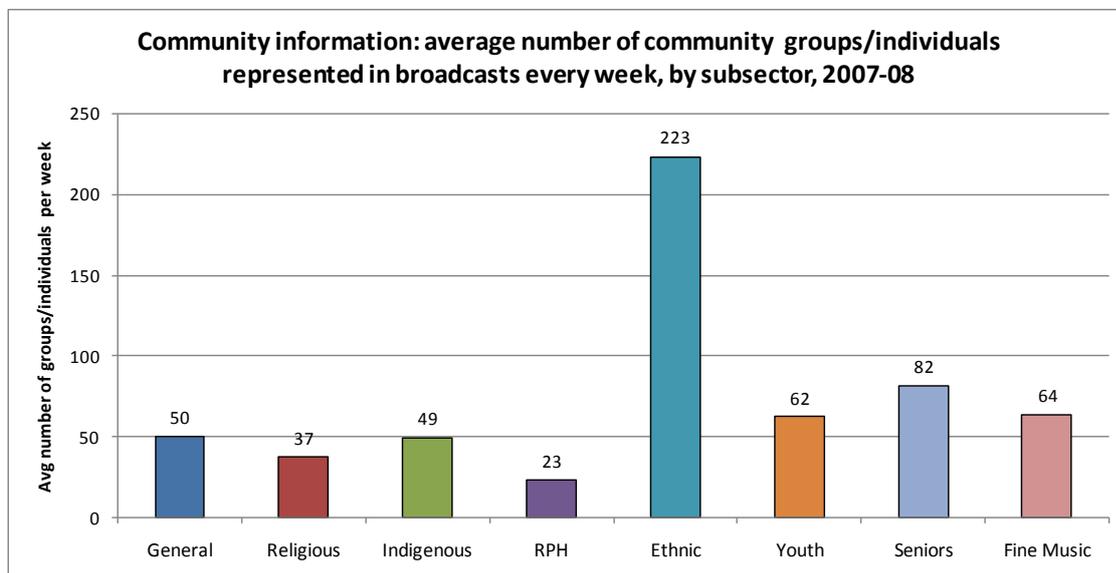
Community information

Community radio stations are committed to providing local information to their audiences. In 2009, for the first time, the CBD survey asked stations to report for an average week, how many individuals and/or organisations they broadcast information on behalf of, and how many minutes of community information was put to air. Community information refers specifically to community service announcements, community events calendars and interviews related to these items.

- Nationally, community radio stations broadcast information on behalf of a total of 14,357 individuals/or groups every week.
- On average, community radio stations broadcast community information on behalf of an average of 53 groups or individuals in an average week. The average was

considerably higher in metropolitan stations which reported an average of 94.

- The number of individuals/or groups that community radio stations supported through the broadcast of community information varied between stations with different specialist interest. Ethnic stations were notable for an extremely high level of engagement, averaging 223 different groups/individuals in an average week.



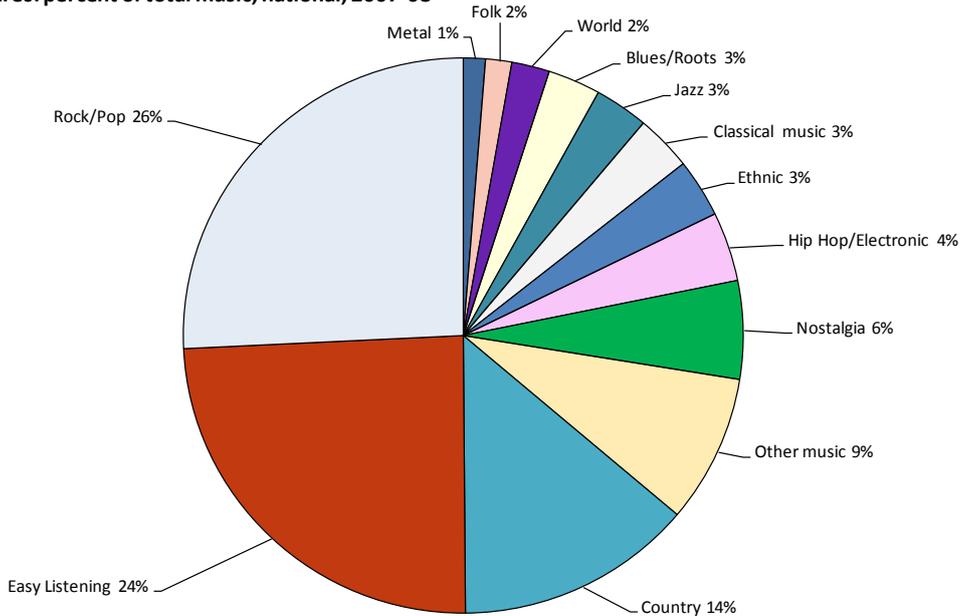
- On average, community radio stations broadcast 383 minutes of community information every week (just over 6.5 hours a week).
- Nationally, a total of 104,036 minutes (1,734 hours) of community information is put to air by community broadcasters every week.
- During the 12 month period covered by this survey, the Australian community radio sector broadcast a total of 90,164 hours of community information to its communities.

Music genres

Community broadcasters offer a diverse range of music genres or styles to its audiences.

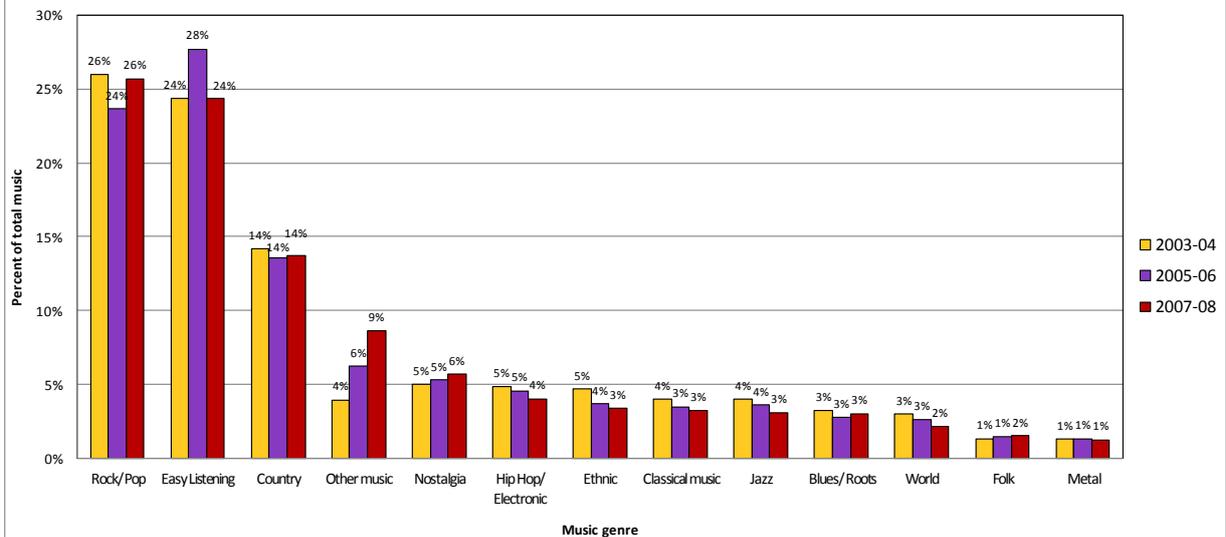
- Nationally, the most common genres were rock and pop - 26% of all music broadcast, easy listening - 24%, and country - 14%.

Music genres: percent of total music, national, 2007-08



- Most stations provided a mix of genres. The figure below shows music genres as percent of total music played by stations in 2007-08 and provides a comparison with the results from the previous surveys.

Music Genres: percent of total music, national, trend, 2003-08



- The genres shown represent only a portion of those played on community radio stations. For example, styles stations noted in the 'other' category in the survey included reggae, theatre, goth, goth-a-billy, psych-a-billy, rock-a-billy, death-a-billy, hillbilly, punk, death metal, speed metal, emo, yodel, soul, R&B, funk, fusion, ambient, techno, dance, trance, post-rock, alternative country, surf punk, trucky, doo-wop, acappella, ska, industrial, drum'n bass, dub-step, alternative country, post-punk, garage rock, soul, brass band, hardcore, experimental, soundtrack, musical theatre, gospel, trance, theatre organ music, trip hop, sacred and contemporary praise & worship.

Indigenous and religious music

The survey categorised Indigenous and religious music as overarching types of music, which are represented across all music genres.

- Every week, a total of 1,308 hours of Indigenous music is put to air by 56% of community radio stations. Stations that broadcast Indigenous music averaged 8.4 hours a week.
- Indigenous stations, as would be anticipated, reported the highest level of Indigenous music, averaging 46 hours a week.
- Metropolitan and rural stations broadcast the highest level of Indigenous music, averaging 19 and 12 hours a week respectively, reflecting the higher concentration of Indigenous stations in these areas. Stations in suburban and regional areas averaged 4.3 and 3.8 hours of Indigenous music per week.
- Seventy-six percent of all stations broadcast religious music, averaging 19.4 hours a week. As would be expected, religious stations were the source of the highest level of religious music, averaging 100 hours a week.
- Every week a total of 4,090 hours of religious music was put to air across Australia, which is equivalent to 212,680 hours over the 12 month period.

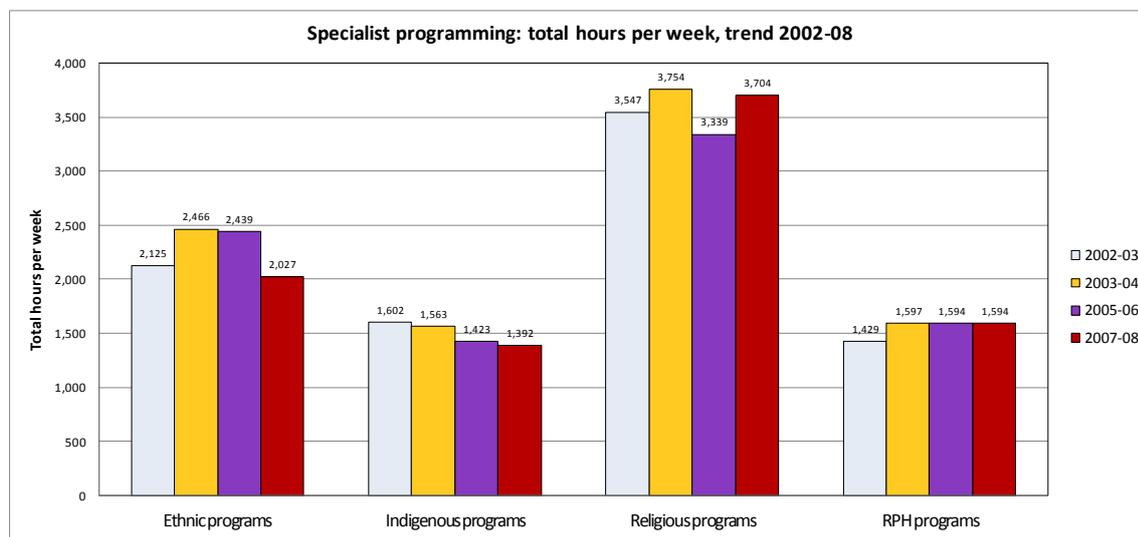
Specialist programming: ethnic, Indigenous, religious, RPH

Community broadcasters meet the diverse content needs of minority and specialist interest groups, in particular those ethnic, religious, Indigenous and RPH communities.

- During 2007-08, 47% of Australian community radio stations broadcast ethnic programming, 39% Indigenous programming, 72% religious programming, and 12% RPH programming.
- 131 stations broadcast **ethnic** programming, averaging 15.4 hours a week per station. Seven of these stations were dedicated ethnic services, while the rest were stations that cater to the needs of ethnic communities within their locality/ specialist interests. Across Australia, a total of 2,027 hours of ethnic programming was put to air every week, which is equivalent to 105,404 hours over the 12 month period.
- **Indigenous** programming was broadcast by 109 stations, with each station averaging 13 hours a week. Twenty of these stations were dedicated Indigenous stations, the rest were non-Indigenous stations catering to Indigenous interests within their communities. A total of 1,392 hours of Indigenous programming was aired every week across Australia, which is equivalent to 72,384 hours of Indigenous programming over the course of the year. It should be noted that the percentage of stations broadcasting Indigenous programming, and the number of hours broadcast, would have been significantly higher had the 80 Remote Indigenous Broadcasting Services (RIBS) been involved in this survey.
- 198 stations broadcast **religious** programming during the 2007-08 period, with each station averaging 19 hours a week. Thirty-four of these stations were dedicated religious stations. In total 3,704 hours of religious programming was aired every week, which is equivalent to 192,608 hours of religious programming for the 12 month

period.

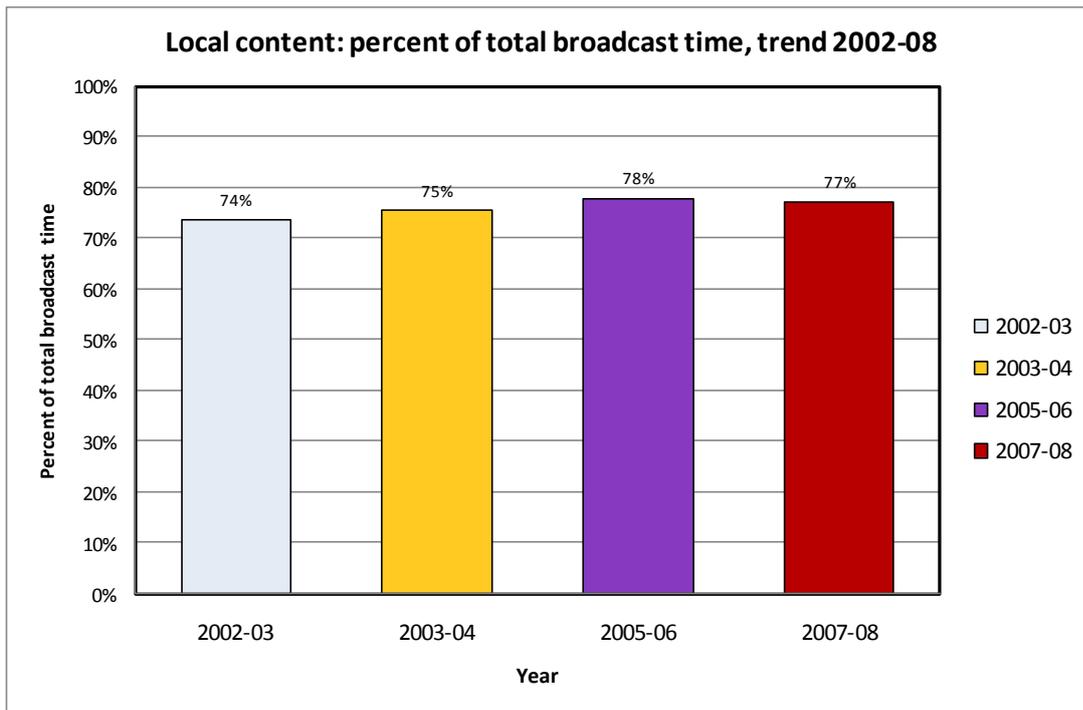
- Community broadcasters also provide specialist services for people with a sight impairment, or **Radio for the Print Handicapped (RPH)**. Thirty-three community radio stations provide RPH services, of which 15 were dedicated RPH stations. A total of 1,594 hours of RPH programming was broadcast every week across the country, equivalent to 82,888 hours over the 2007-08 period.



Local content

Community radio maintains its relevance as a local content producer

- Nationally, community radio stations broadcast 35,806 hours of local content to their communities every week.
- Over the 12 month period, the Australian community radio sector produced a total of 1,861,912 hours of local programming.
- While the national average hours of locally produced content was 129 hours per week, metropolitan and suburban stations exceeded this level broadcasting 141 and 144 hours respectively, while rural stations averaged 125 hours and regional stations 122 hours.
- Nationally, 77% of the content broadcast by community radio stations was produced locally.



- Metropolitan and suburban stations continue to broadcast the highest level of locally produced content at 84% and 86% of total content respectively, while regional stations broadcast 73% and rural stations broadcast 74%.
- Variations in the percent of local content occur across the different specialist interest broadcasters, for instance youth and seniors stations reported the highest levels with 97% and 95% respectively, while ethnic stations averaged 81%, general stations 80%, Indigenous 79%, religious 73%, fine music 77% and RPH 32%.
- The level of local content broadcast by Australian community broadcasters has been consistently high since they were first recorded by the CBD survey:
 - 2002-03 average of 125 hours per week
 - 2003-04 average of 128 hours per week
 - 2005-06 average of 131 hours per week
 - 2007-08 average of 129 hours per week

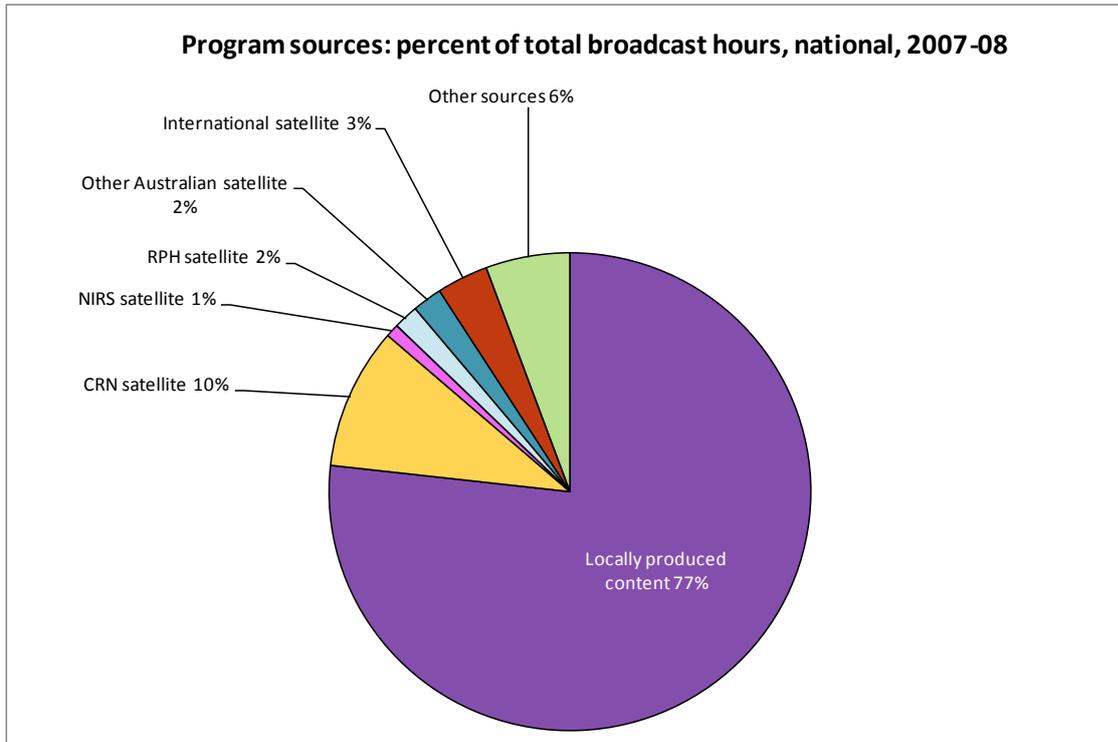
Satellite services

Community radio stations compliment locally produced content with programming sourced from satellite services.

- Overall, 17% of community broadcasting programming was sourced from satellite services.
- 13% of all programming was sourced from the community broadcasting sector's three satellite services: Community Radio Network (10%), Radio for the Print Handicapped satellite (2%) and National Indigenous Radio Service (1%)¹⁰.

¹⁰ The NIRS usage shown here does not include the significant use of NIRS made by Remote Indigenous Broadcasting Services

- A further 2% of total programming came from other national satellite services or program networks including CAAMA and PAKAM (providers of Indigenous programming in remote regions), the Vision Radio Network (Brisbane-based Christian programming service) plus a small proportion from Austero, Sky, Southern Cross Broadcasting, SBS and ABC.
- A further 3% came from international satellite services, including the BBC and Germany's Deutsche Welle.



- Percentage of stations that accessed the range of satellite services available to community broadcasters:
 - 49% - CRN satellite services
 - 17% - International satellite services
 - 17% - Other Australian satellite services
 - 8% - NIRS satellite services
 - 6% - RPH satellite services
- Nationally, stations broadcast an average of 43 hours of programming sourced from satellite services every week.
- Station use of satellite services was influenced by station location, with rural stations making the highest use of these services, broadcasting an average of 51 hours a week; followed by regional stations with an average of 45 hours; suburban 34 hours; and metropolitan 30 hours.

Other sources of programming

It is anticipated that with increased use of the internet and the development of new IP based distribution platforms, community radio stations will increasingly source programming material from these distribution networks. For this reason the 2009 CBD survey asked a separate question about programming sourced from 'other sources' to account for other

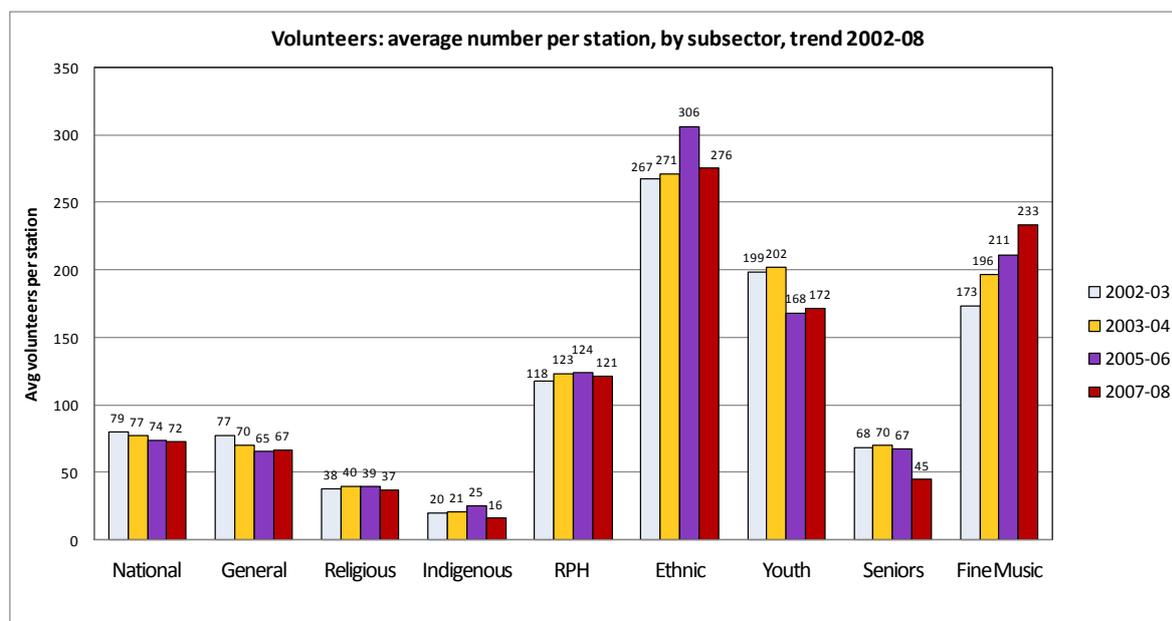
distribution technologies (note: in addition to IP based platforms, other sources could also include programming received on CD or other portable mediums)

- Nationally, 45% of stations (126 stations) sourced programming material from ‘other sources’, broadcasting an average of 21 hours per week.
- Christian stations were the highest users of ‘other sources’, with 83% of these stations accessing this type of content, broadcasting an average of 51 hours per week, equalling a total of 1,491 hours every week (this may be largely attributed to the development of the MediaPoint podcast service, provided by Christian Media Australia (CMA) to its member stations).

Volunteers

Volunteers are at the core of community broadcasting, working collectively to assist in every capacity in the operation of community radio stations.

- A total of 19,858¹¹ people worked voluntarily at fully licensed community radio stations during the 2007-08 period. This was 893 less volunteers than reported in the previous survey; however, this decrease is attributable to the reduction in the total number of fully licensed stations, by 8, between these two periods.
- Nationally, the average number of volunteers per station, at 72, has decreased slightly over the five years since 2002-03 when it stood at 79.
- The number of volunteers varies across stations with different specialist interests. Ethnic, fine music and youth stations continue to have very high numbers of volunteers averaging 276, 233 and 172 respectively, followed by RPH stations which averaged 121 volunteers per station. Indigenous stations had the least number of volunteers, averaging 16 per station.

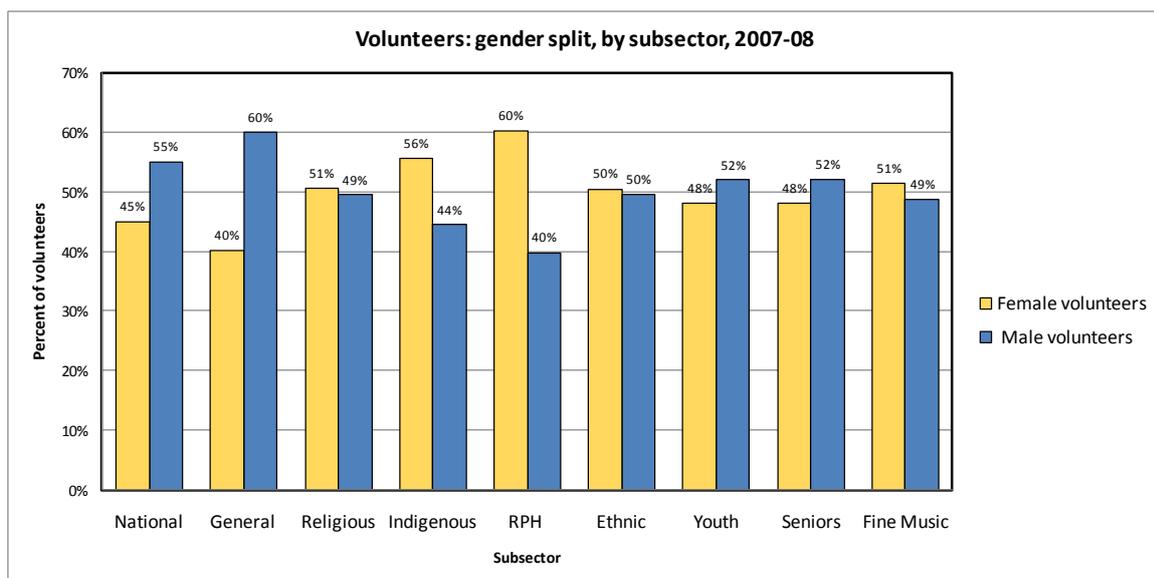


¹¹ The total number of volunteers quoted here does not take into account the number of people who volunteered their time at stations with temporary community radio licences, or those who worked in a voluntary basis at community television stations.

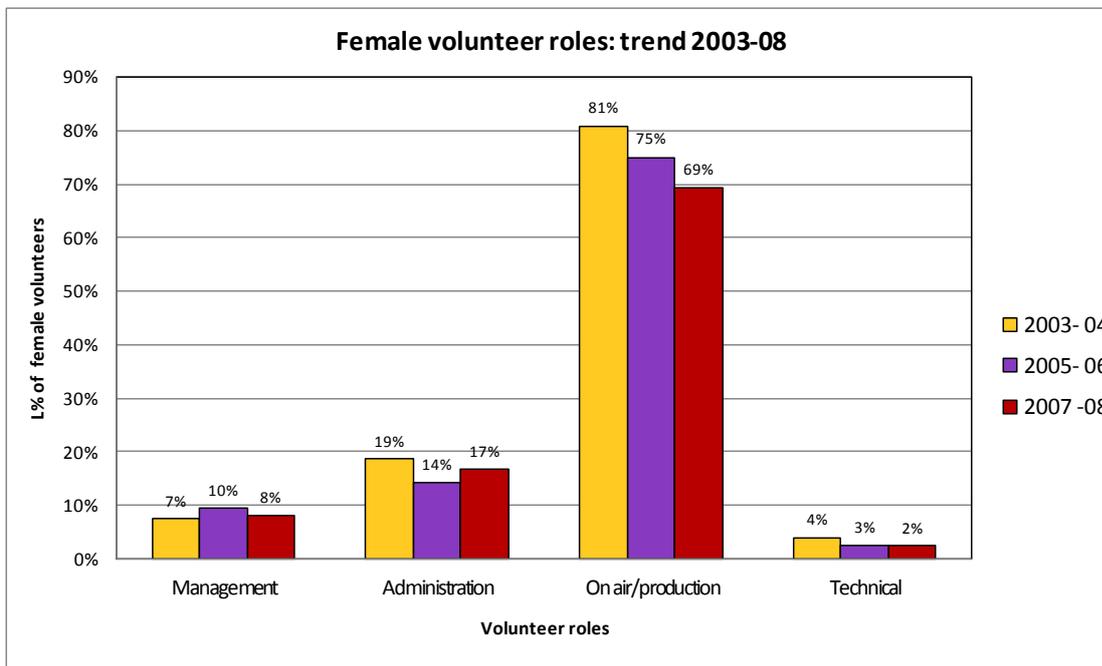
- Most stations (99.2%) had volunteers.
- Station location and associated population density was a significant factor influencing volunteer numbers: metropolitan stations report the highest level of volunteers, averaging 176 per station, while suburban stations were next highest with 79. Considerably lower were regional and rural stations averaging 49 and 29 volunteers respectively.
- Also notable is the fact that stations with higher incomes have higher numbers of volunteers: stations earning over \$500k a year averaged 188 volunteers, while stations earning under that amount averaged 58.

Volunteers: gender

- The trend towards a higher number of male volunteers compared to female volunteers continued to be evident in the 2007-08 period, with 55% of all volunteers being male and 45% female.
- Nationally, the average number of female volunteers per station was 33, while the average number of male volunteers was 40.
- Nationally there were 8,930 female volunteers and 10,928 male volunteers.
- While the lower proportion of female volunteers was reflected across all locations, the level of female volunteers was lowest in suburban stations where they represented just 33% of volunteers. At metropolitan stations they represent 48%, and at regional and rural they represented 47%.
- On the other hand the split between male and female volunteers across specialist interest stations tended to be more even than the national average: female volunteers represented 51% of volunteers in religious stations, 56% in Indigenous stations, 50% in ethnic stations, 48% in youth and senior stations. RPH stations stood out for the highest proportion of female volunteers, at 60%.



- Of all female volunteers, the highest proportion were engaged in presentation and production related activities (69%), followed by administration (17%). A small proportion of female volunteers were engaged in management (8%) and just a few in technical roles (2%).



Volunteers: age

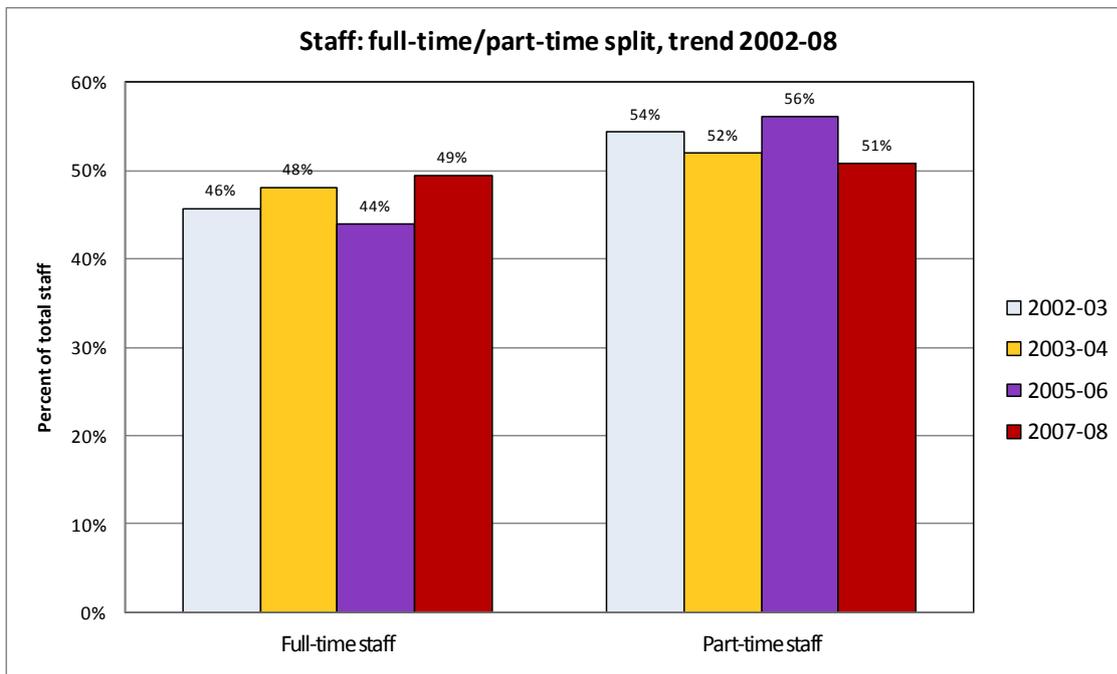
A significant number of young people are involved in community broadcasting.

- 88% of stations have volunteers under the age of 26. (Extract report 62)
- There were 4,013 volunteers under the age of 26. This is equivalent to 20% of all volunteers.
- Nationally, the average number of volunteers under the age of 26 per station was 17.
- Youth involvement varied according to station location, with metropolitan stations reporting the highest number of volunteers under the age of 26, averaging 44 per station, whereas suburban stations averaged 14, regional 9 and rural 8.
- As anticipated youth stations reported the highest average of volunteers under the age of 26 with 137, followed by ethnic stations with 54, general stations 13, religious and fine music stations 7, and Indigenous and RPH stations 6.
- Stations that earned more the \$500k per annum had the largest number of volunteers under the age of 26, averaging 41 per station. While stations that earned less the \$500k per annum averaged 13.

Staff

Despite the sector's emphasis on volunteerism, a significant number of people continue to be employed by the sector. In 2007-08 staffing levels increased.

- The number of stations that employed staff increased on that of the previous survey period from 58% of the sector in 2005-06, to 61% of the sector in 2007-08.
- In 2007-08, 39% of stations were operated entirely by volunteers.
- A total of 936 staff were employed by the sector in a combination of full and part-time positions. This was a 10% increase in the total number of people employed over that of the previous survey period when the sector employed 848 people.
- The number of full-time staff increased across the sector. In 2007-08 the total number of full-time staff was 462 (up from 372 for 2005-06), while the total number of part-time staff was 476 (same as for 2005-06).
- The total number of Effective Full Time staff (that is the total number of staff hours divided by the equivalent of a full time working week, 35 hours) employed by the sector was 676. This was a significant increase (up 26%) from the 534 EFT staff employed during the previous survey period.
- Nationally, of the 168 stations that employed staff, each station employed an average of 5.6 staff. The average number of staff was, however, generally higher for specialist interest stations: religious 8.5, Indigenous 8.8, ethnic 6.3, seniors 5 and fine music 11.3; RPH stations were an exception, employing an average of only 2.3 staff.
- The proportion of staff employed in a full-time capacity increased during the 2007-08 period to 49% (44 % for previous survey). Part-time staff made up the remaining 51%.



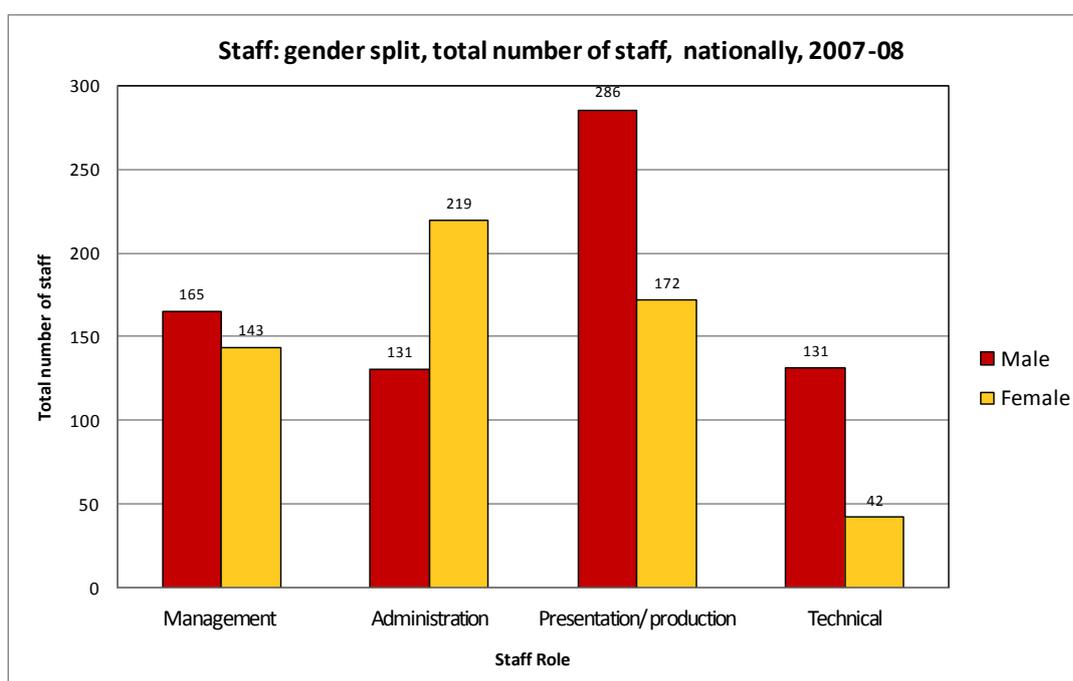
Staff: gender

- Nationally, the gender split of staff is very similar to that of volunteers, with a slightly higher percentage of male staff (56%) than female staff (44%). While the gender split largely follows this pattern for stations with specialist interests, it was more pronounced in seniors stations where 73% of staff were male, and 27% of staff were

female.

- The staff gender split has gradually shifted since 2002-03 when 61% of staff were male and 39% were female, to the current split of 56% male and 44% female staff.
- Nationally, the sector employed a total of 416 female staff, and 520 male staff.

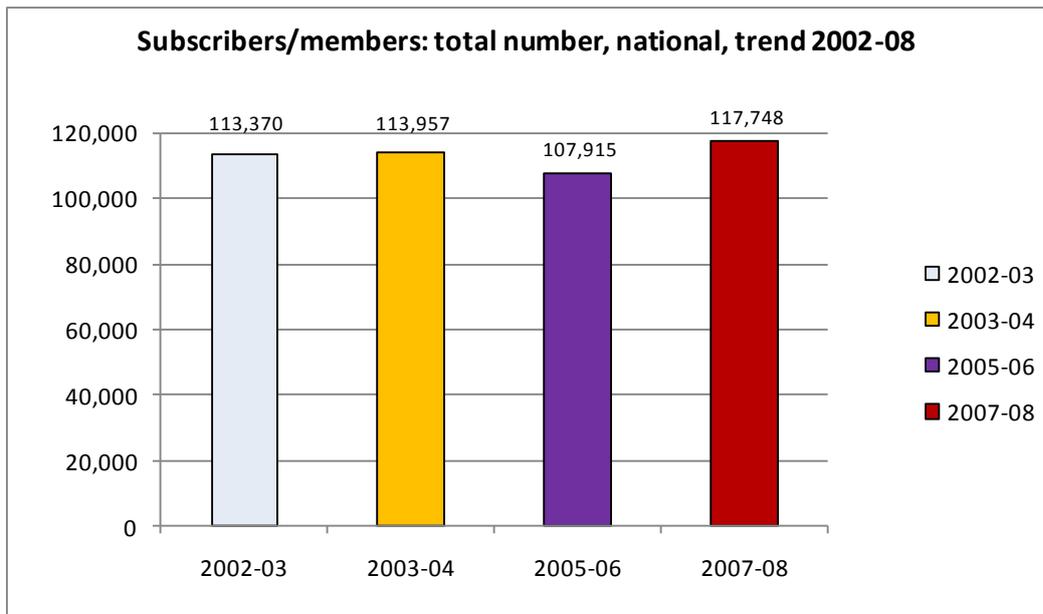
For the first time in 2007-08, the CBD survey asked for a breakdown of the different roles that both female and male staff were involved in so they could be compared between the genders. This revealed a male and female staff split that was relatively even in management roles (165 males/143 females), whereas male staff were more likely to be involved in technical (131 males/43 females) and presentation roles (286 males/172 females), and female staff were more likely to be involved in administration roles (219 females/131 males).



Subscribers

Subscribers/members provide strong support for community broadcasting.

- During the 2007-08 period, on average, 7% of station income came from subscriptions. (see *Income* section for details)
- Most community radio stations (91%) derived part of their income from subscribers/members.
- The number of subscribers varied greatly across the sector, from stations with no subscribers to stations with more than 10,000.
- Across the sector, a total of 117,748 people were either subscribers to, or members of, a fully licensed community radio station. This was 9% more subscribers/members than for the previous survey period when there were 107,915.



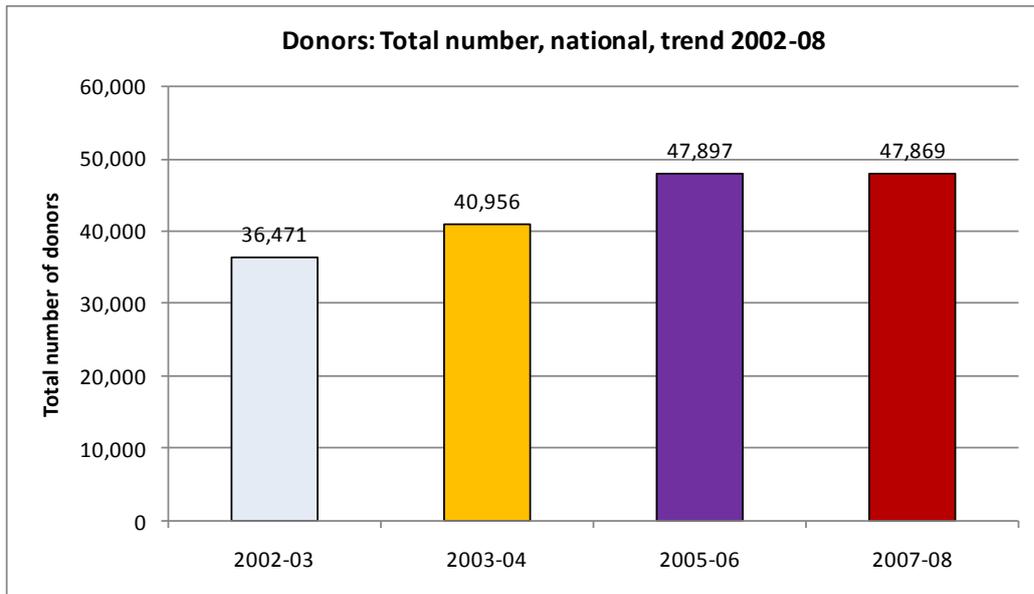
- Nationally, stations had an average of 446 subscribers/members. This was a 9% increase from the 2005-06 survey which recorded an average of 409 subscriber/members.
- The potential for stations to attract subscribers/members varies across locations according to population density. At one end of the scale metropolitan stations averaged 1,485 subscribers/members while, at the other end, rural stations averaged just 109. Suburban and regional stations were more similar, averaging 256 and 243 respectively.
- Rural and regional stations experienced a significant rise in the average number of subscribers/members between 2005 and 2008. Rural stations average increased from 75 to 109 (a 45% increase) subscribers and regional stations increased 149 to 243 (a 63% increase).
- Subscriber/member numbers vary across the specialist station categories. Fine music stations attracted the highest number of subscribers/members with an average of 2,622. This was followed by ethnic stations which averaged 1,512, and youth stations which averaged 988.
- While generalist stations member/subscriber numbers are historically below the national average (which is influenced by the high subscriber rates of fine music, ethnic and youth stations), they did experience a significant rise in their average for this period, increasing from 328 to 395 (an increase of 20%).

Donors

Community radio stations also derive a significant level of financial support from their communities through donations.

- Donations account for 12% of total national income. (see *Income* section for details)
- During 2007-08, 85% of community radio stations received income from donations (similar to previous survey – 84%)

- A total of 47,869 people donated money to community broadcasting stations (an increase of 11,398 or 31% since 2002-03).



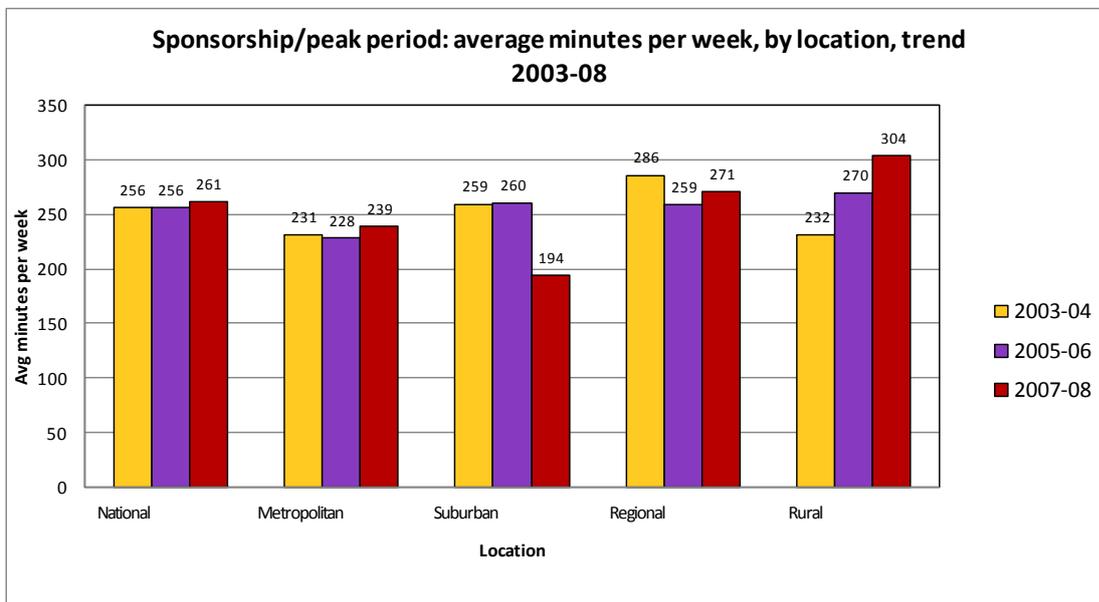
- While the national average number of donors per station was 203, there were dramatic differences between the different locations. There were many more donors in metropolitan areas (average of 888 per station) compared to stations in suburban (33), regional (62) and rural areas (27).
- As with subscribers, the number of donors varied substantially between stations of different specialist interests. Ethnic stations continue to report, by far, the highest number of donors with an average of 2,351 per station, followed by religious stations which averaged 648, and fine music stations with 397. Moving down the scale, RPH stations averaged 124, seniors 97, general 71, and youth 50.

Sponsorship

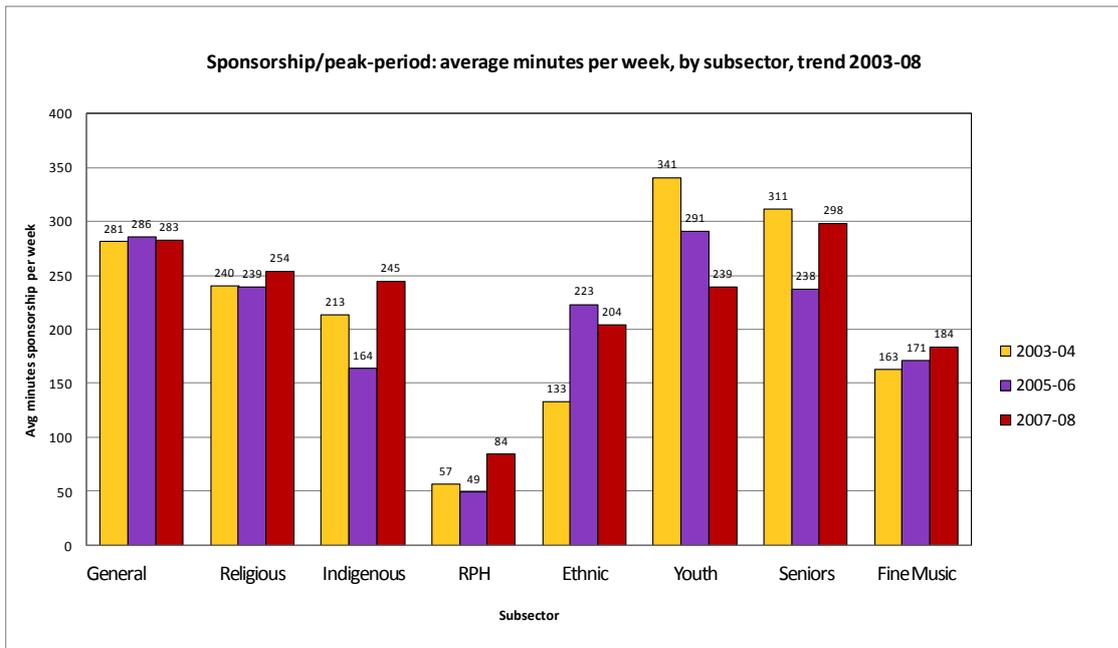
Sponsorship plays an important role in generating financial support for community broadcasters

- Sponsorship continues to play an important role in station operations, accounting for 41% of the national income (see following income section for details).
- Daytime: almost all stations (99%) broadcast sponsorship during the day-time period (6am-6pm), averaging 191 minutes per station in a week (45% of the total number of sponsorship minutes available during this period of 420 minutes).
- Evening: most stations (90%) broadcast sponsorship during the evening period (6pm to midnight), averaging 78 minutes per week (37% of the total number of sponsorship minutes available of 210 minutes).
- Together, the daytime and evening periods constitute the peak period for sponsorship. Almost all stations (99%) broadcast sponsorship during this period. The average sponsorship minutes during this period increased slightly from the previous survey period, rising from 256 to 261 minutes per week.

- Overnight/off peak: less than half of all station (40%) broadcast sponsorship messages during the off-peak period (midnight-6am), averaging 74 minutes per week (35% of the total number of sponsorship minutes available – 210 minutes).
- The number of minutes of sponsorship broadcast during peak period (6am – midnight) was greatest in areas of least population density: rural stations averaged 304 minutes a week and regional stations 271, whereas metropolitan stations averaged 239 and the lowest level was suburban stations with an average of 194 minutes.
- There has been a steady climb in the average number of peak-period sponsorship minutes in rural areas between 2003-04 and the current period, climbing from 232 to 304 minutes over that period.
- Over the same period, suburban stations have experienced a significant decrease in the number minutes of peak-period sponsorship, dropping from 259 to 194 minutes between 2003-04 and 2007-08.



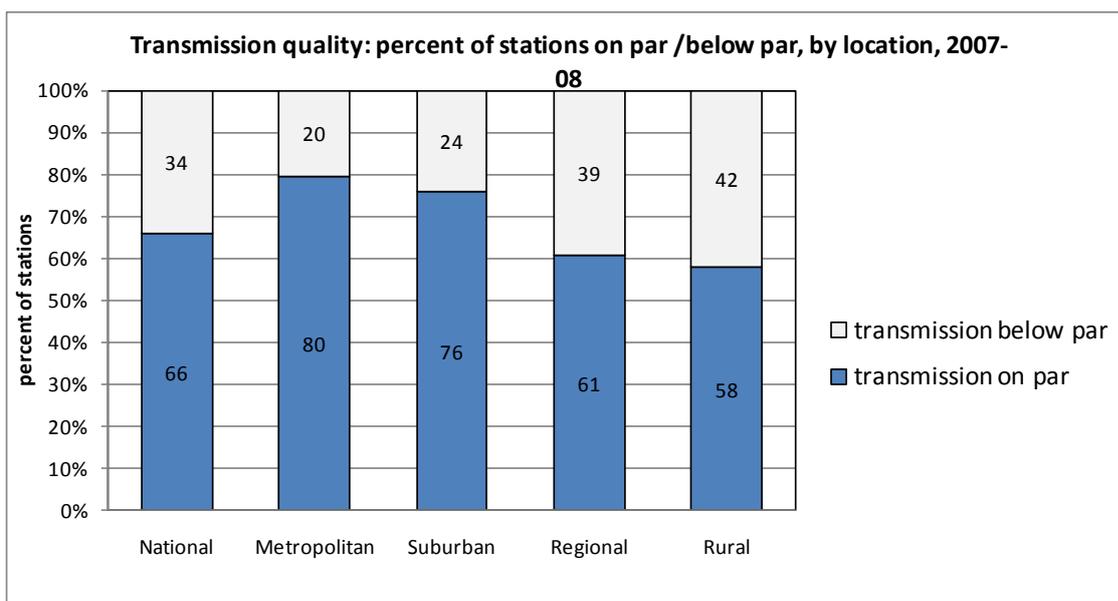
- Across different specialist interest stations, the average number of minutes of peak-period sponsorship varied considerably. In 2007-08 seniors stations reported the highest average with 298 minutes per week, followed by general stations with 283, religious with 254 and Indigenous with 245 minutes. RPH stations reported the lowest level, with just 85 minutes.
- The number of peak-period sponsorship minutes have decreased significantly for youth stations, dropping from 341, to 291, and then to 239 over the past three CBD survey periods.
- Over the same period, fine music stations have gradually increased their peak-period sponsorship minutes, from 163, to 171, and then to 184 in the current period.



Reception quality

A considerable percentage of community radio stations still operate with less than adequate reception.

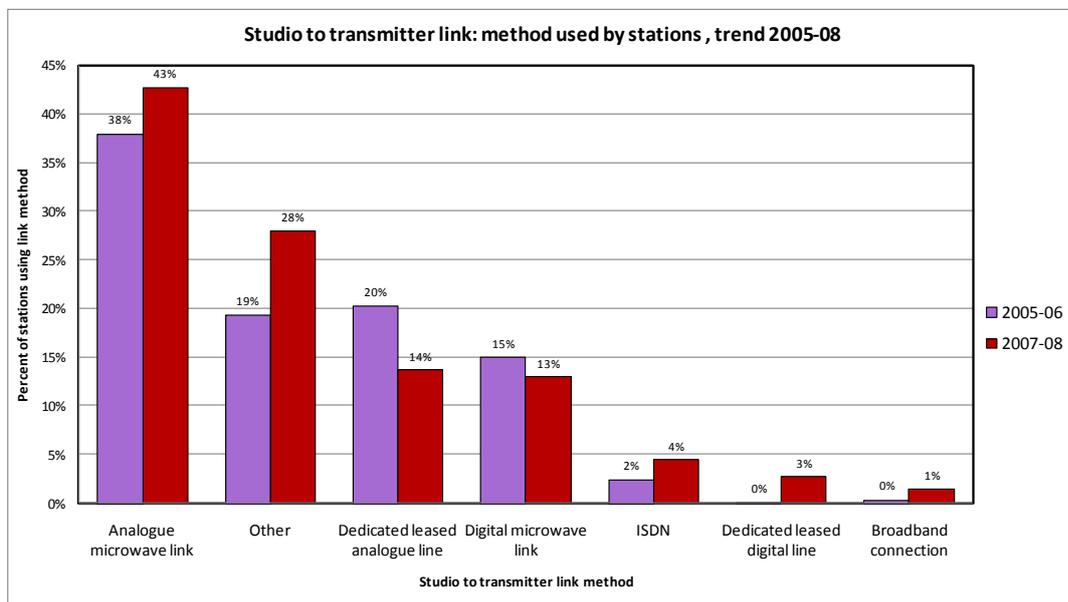
- Nationally, 66% of the sector (182 stations) reported that their station's current transmission facilities provided for reception/coverage that was on par with other broadcasters in their area. This means that nationally 34% of stations (95 stations) operate with inferior transmission facilities.
- The highest levels of reception disparity occurred in country areas where 42% of rural and 39% of regional stations had transmission facilities that were not on par with other broadcasters; while in metropolitan areas and suburban areas reception disparity affected 20% and 24% of stations respectively.



- Most stations (93%) that earned more than \$500k per annum reported that their transmission facilities were on par with others in their broadcast areas, whereas only 63% of stations that earned below than \$500k per annum had transmission facilities that were equal to other broadcasters in their area.

Transmitter link methods

- In 2007-08 the most common method for linking between stations and their transmitters was analogue microwave link (43% of stations), followed by ‘other’ methods not specified in the survey (28%), dedicated leased analogue line (14%), digital microwave link (13%), ISDN (4%), dedicated leased digital line (3%) and broadband connection (1%).
- Linking method trends between 2005-08 show increased use of analogue microwave links, ‘other’ methods, ISDN, dedicated leased digital line and broadband; while the use of dedicated leased analogue line and digital microwave link decreased.



Transmission facilities: leasing arrangements

For access to transmission sites and facilities, many community radio stations are reliant on lease arrangements with third party providers.

- More than half of community radio stations (61%) lease their transmission site and/or facilities from a third party. These arrangements are most prevalent in metropolitan areas where 84% of stations had leasing arrangements, followed by suburban stations (68%) and regional stations (61%). Rural stations are the least reliant on third party lease arrangements (39%).
- More specifically, 51% of all stations leased their transmission site from a third party provider, and 33% of stations leased their transmission facilities and equipment.
- Overall, the sector paid out a total of \$2,302,765 to third party providers in 2007-08 for the lease of transmission site and/or facility and transmission equipment.

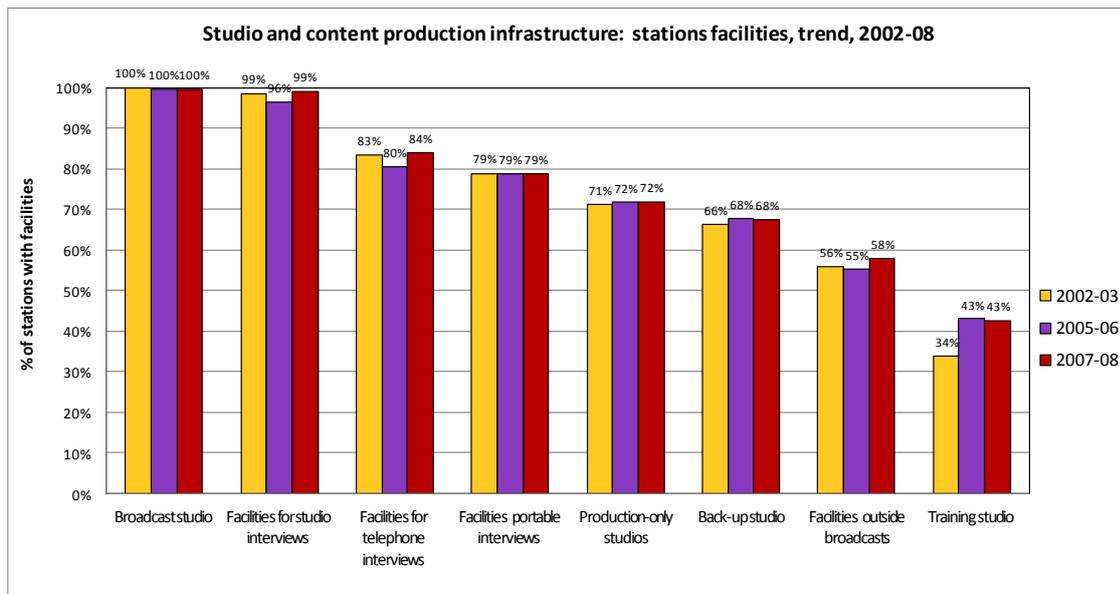
Studio facilities

Studio facilities continue to be below industry benchmarks.

- All community radio stations had a broadcast capable studio, but only 68% of stations have the security of a backup broadcast capable studio. This means that 32% of community radio stations operate below the minimum studio infrastructure benchmark of two broadcast-capable studios to enable simultaneous broadcast and production. Similarly, while 72% of stations had a studio dedicated to production, 28% operated without this facility. These levels have persisted since CBD station surveying began in 2002-03.

Training facilities

- The level of stations with suitably large studios available for training purposes remains constant at 43%. This means that more than half of the sector (57% of stations) does not have studios suitable for training groups of students.
- Stations in metropolitan areas were more likely to have studios for training purposes (64%), followed by rural stations (41%), regional stations (38%) and then suburban stations (33%).



Interview facilities

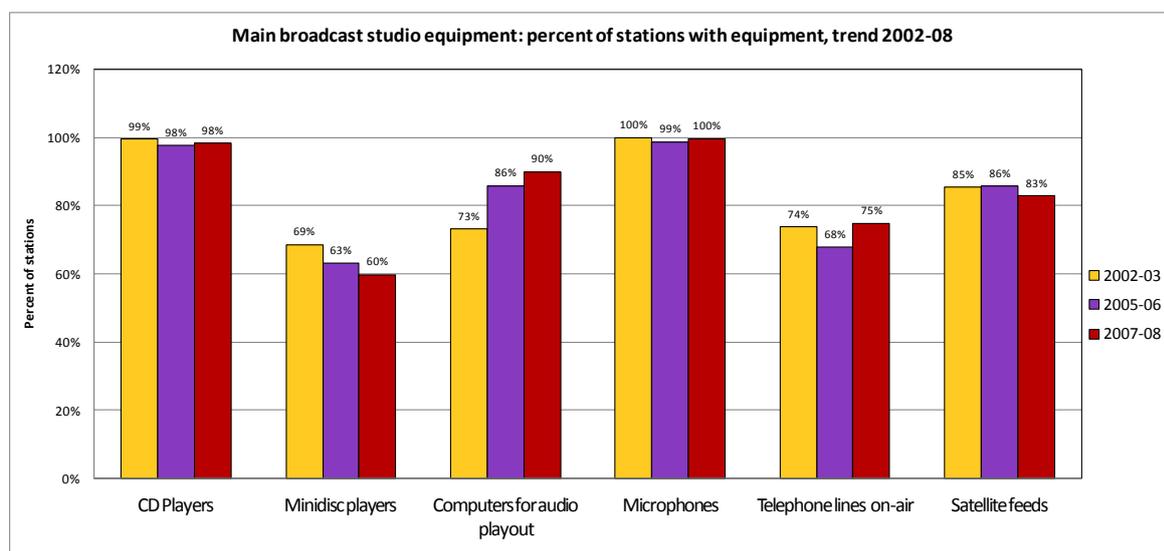
Interviews are a major source of local news and information broadcast on any radio station, however many community radio stations had less than minimum industry benchmarks in respect to these facilities.

- While almost all stations (99%) had facilities to conduct studio interviews, fewer stations had facilities to conduct telephone interviews (84%) or portable interviews (79%).
- While 84% of stations had facilities to conduct telephone interviews, these were in the main based on unsophisticated equipment without talkback functions. Only 26% of stations had systems that allowed telephone callers to be managed and queued by a producer ready for talkback with the presenter, and only 27% had a delay system that

allows inappropriate content to be deleted from the telephone interview prior to broadcast.

Main broadcast studio equipment

- All main broadcast studios have microphones (100%) and most have CD players (98%).
- Many studios now have computers for audio playback (90%) as standard equipment. These facilities have become more wide spread over recent years, increasing by 17 percentage points since 2002.
- Across the sector, 83% of stations had satellite feeds available to their main studios.
- Most main studios are equipped with on-air telephone lines (75%).
- Minidisc player facilities are on the decrease. Only 60% of stations reported these facilities in their main studios in the current survey, down 9 percentage points since 2002.



Outside broadcast facilities

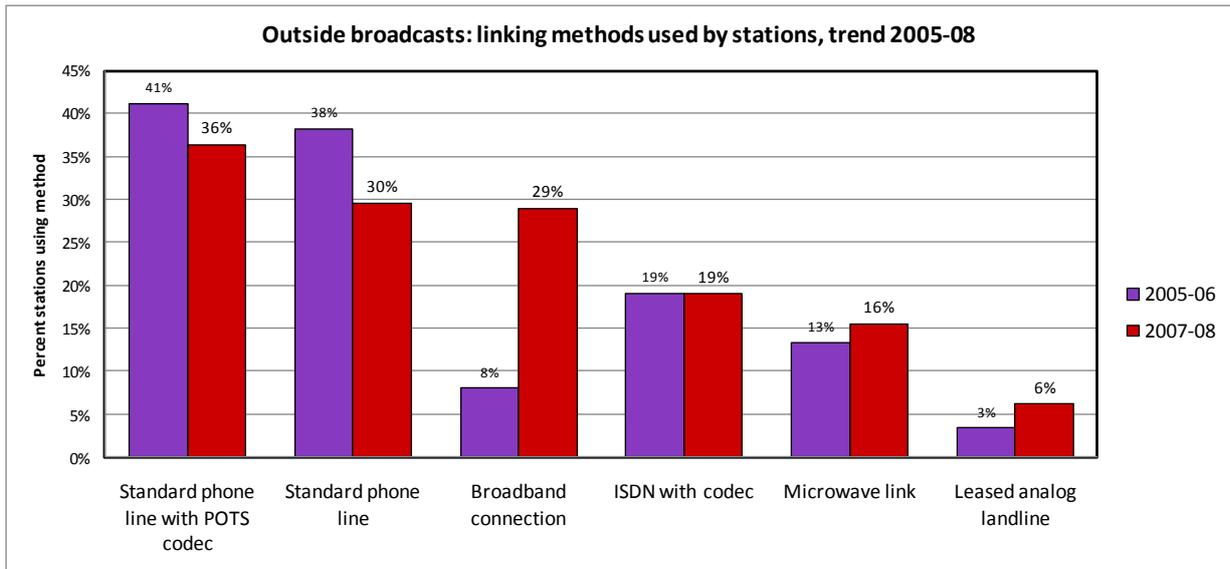
Through outside broadcasts (OBs), stations can actively engage with their communities through on-site coverage of community, cultural, sporting and other events.

- Despite the obvious role for OBs in developing community broadcasting objectives, just 58% of all stations have these facilities (a slight increase of 3 percentage points - from the previous survey).
- Youth and Indigenous stations had the highest levels of OB facilities (88% of stations) followed by ethnic stations (71%), general stations (58%), religious stations (48%), and just 27% of RPH stations reported having OB facilities.

Outside broadcast links

To run an OB, audio links are required to connect the OB site back to the station. There are various methods for establishing these links and the options continue to expand as new technologies become available.

- The most prevalent method used by stations to connect to OB facilities was standard phone line with POTS codec (used by 36% of stations), followed by standard phone line (30%), broadband connection (29%), ISDN with codec (19%), Microwave link (16%) and leased analogue landline (6%).
- There has been a big jump in the use of broadband connection between 2005-06 and the current survey, increasing 21 percentage points. There have been smaller increases in the use of microwave links and leased analogue lines (3 percentage points each). On the other hand, use of a standard phone line with POTS codec, while still the most popular link method, has decreased by 5 percentage points. Similarly, the use of standard phone lines decreased by 8 percentage points.



Technical staff

Community broadcasting operations are dependent on technical expertise to maintain and develop radio broadcasting equipment. While the majority of stations depend entirely on volunteers, some stations have staff that assist with these activities.

- Nationally, a total of 173 community radio staff were involved in technical or technological development/maintenance activities. It should be noted that these staff were not necessarily employed exclusively in technical roles, but may have performed other roles at the station.
- 33% of stations reported that they had male staff involved in technical or technological development/maintenance activities (nationally, a total of 131 male staff).
- 15% of stations reported that they had female staff involved in technical or technological development/maintenance activities (nationally, a total of 42 female staff).

Computers and equipment

Converging broadcast, information and communication technologies have created a new paradigm for media technical infrastructure over the last two decades. Community radio stations commonly use computers to assist in administration, production and for audio play-out.

- During 2007-08 community radio stations used computers most widely for administration purposes with 97% of all community radio stations using computers for office functions. Still however, 3% of stations do not have these facilities.
- Computer technologies were also used extensively for broadcast and production purposes: 93% of stations used computers for audio preview or production and 90% used computers for playout of audio material from a broadcast studio.
- 58% of stations had their computers fully networked, 28% had them partially networked, and 14% operate their computers as stand-alone units.

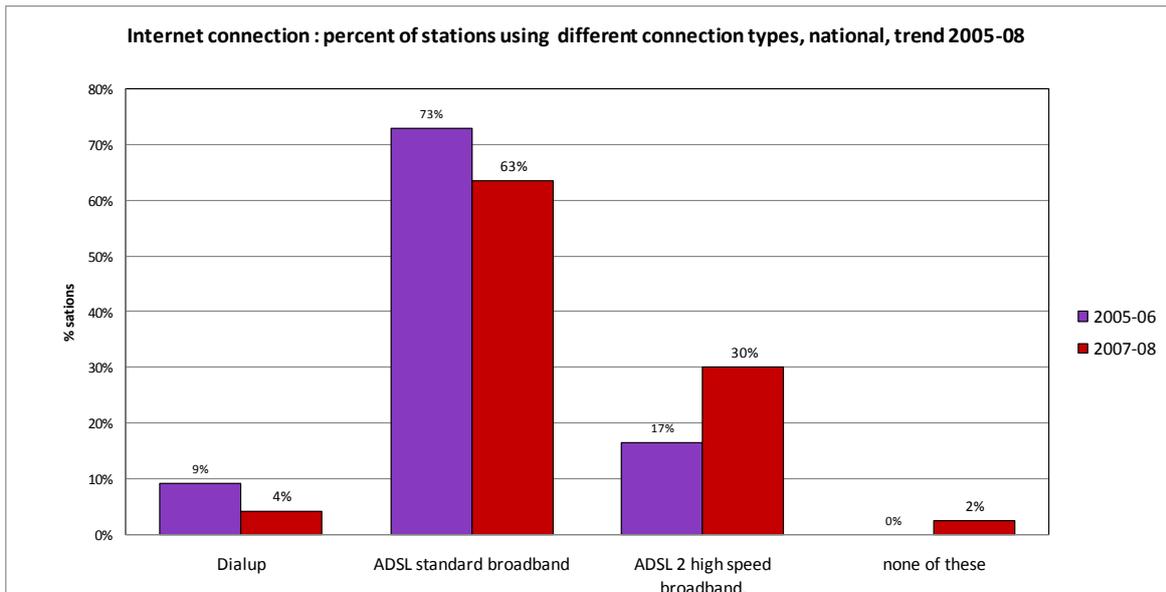
Specialist software

Community broadcasters use specialist software to manage a range of station operations.

- The survey showed that 56% of stations used specialist software for music storage and access, 55% of used specialist software for general scheduling and 36% used software for sponsorship billing, while 21% didn't use specialist software for any of the above.
- A wide variety of audio playout systems were used by stations (45 different systems were reported), with Simian and Raduga being most prevalent, followed by MJM player, Station Playlist, Zara Radio, Dinesat, Jazler, RCS and WinAmp.
- The audio playout systems used by stations had varying degrees of functionality: 26% of stations had systems that had the ability to generate extra 'now playing' data such as images and text; and 62% of stations had systems that could generate administrative logs of music or sponsorship.

Internet

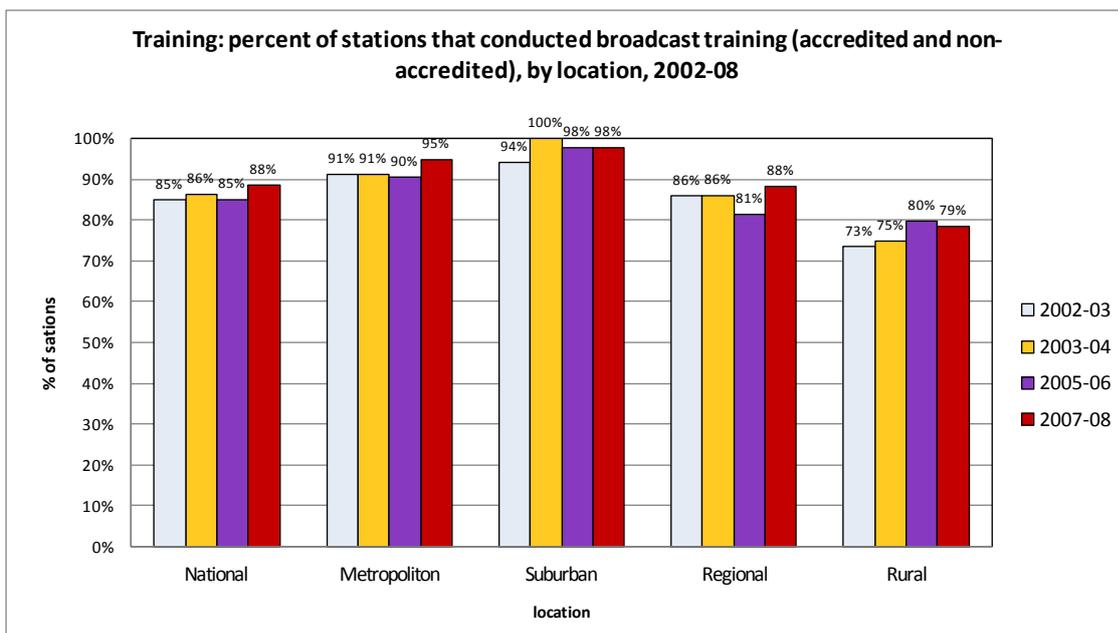
- Onsite internet access is a basic requirement for station communications and program research and 96% of community radio stations have these facilities. This figure is 3 percentage points up from the previous survey and the gap is closing, however 4% of stations are still without onsite internet access.
- Of the 96% of stations that have onsite internet facilities, 63% use ADSL standard broadband, 30% use ADSL 2 high speed broadband, 4% use a dial-up connection, and a 2% use another type of connection.
- Since the previous survey there has been a decrease in the percentage of stations using dialup connections (down 5 percentage points) and ADSL standard broadband (down 10 percentage points), while ADSL 2 high speed has increased by 13 percentage points.



Training: all

Most community radio stations provide some form of training.

- The 2007-08 survey showed that the majority of stations continue to recognise the importance of training, with 88% of stations conducting some form of organised or formal training over the period (accredited and non-accredited).
- An average of 31 people participated in training at each of the 245 stations that provided this opportunity.
- The level of training was highest in suburban areas where 98% of stations conducted training during the survey period, while rural stations reported the lowest level with 79% of stations conducting training.



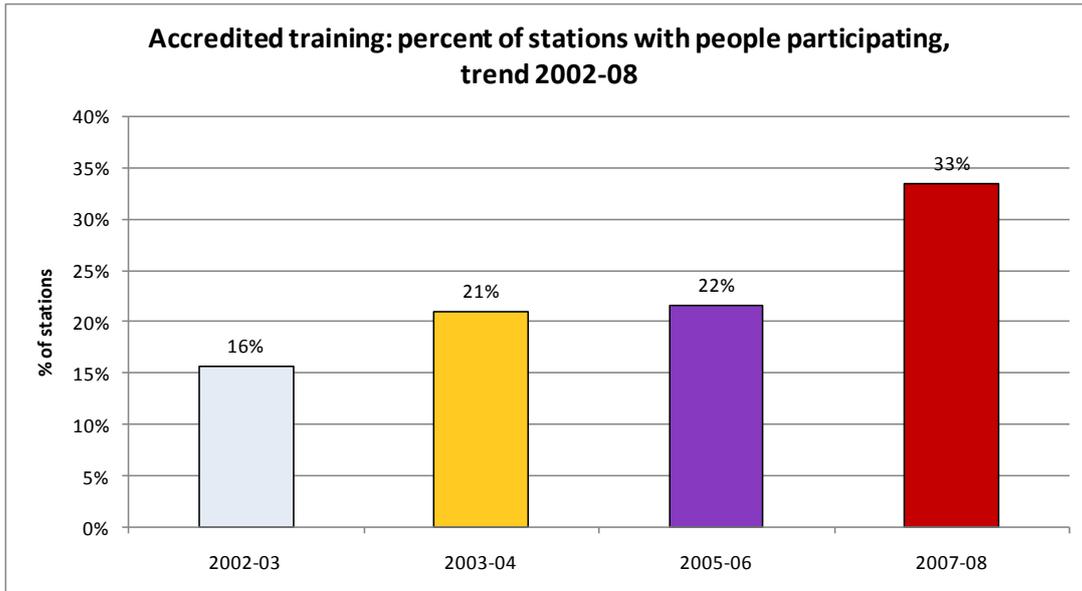
- During the 12 month period, across the sector a total of 7,560 people took part in some form of organised broadcast training at their station (includes accredited and non-accredited training).
- Every week a total of 2,693 training hours¹² were provided by community radio stations in 2007-08. For the 12 month period community radio stations provided a total of 140,036 training hours.
- On average, stations provided 11 training hours per week.
- Youth stations provided the highest levels of training: 100% of youth stations provided training, averaging 59 hours per week, with 195 people receiving training over the 12 month period.

Training: accredited

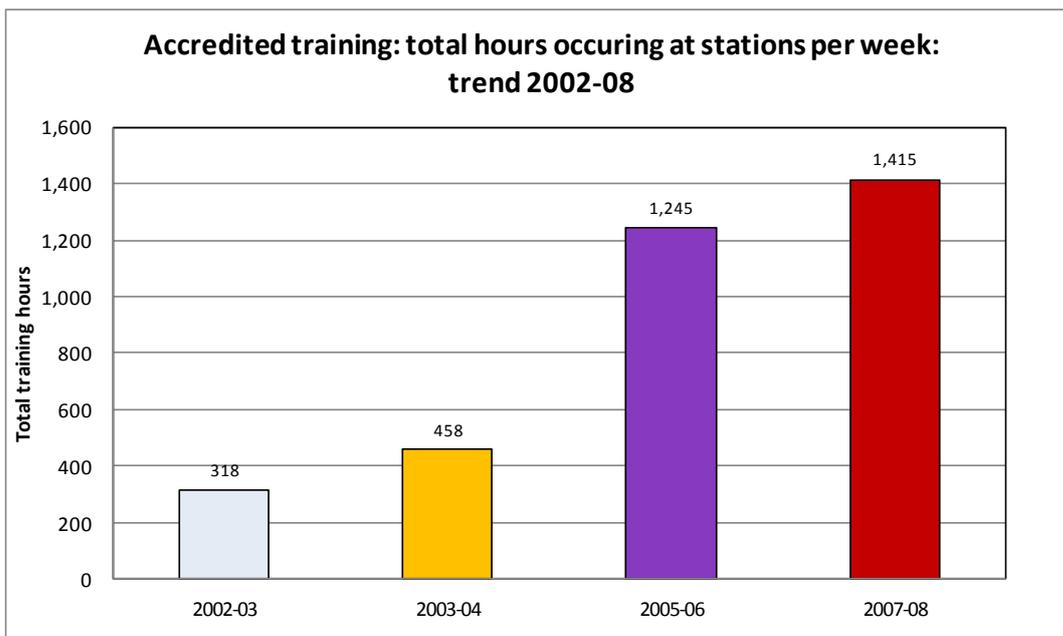
Accredited training offers the community radio sector the opportunity to establish national standards in training which are recognised by both the sector and the rest of the media industry. Community radio stations can access accredited training through the sector's five Registered Training Organisations (RTOs): CBAA, Radio Adelaide, Brisbane Indigenous Media Association, Diversitat, Goolarri, plus through broadcast training offered by Commercial Radio Australia and TAFE colleges.

- In 2007-08, across the sector, 708 community broadcasters participated in accredited training programs. This was a 21% increase on the total number of people that received accredited training for the previous survey period.
- The highest number of people received training in metropolitan areas (total of 305), followed by regional areas (196), rural areas (122), and then suburban areas (84).
- People from 33% of all community radio stations participated in accredited training programs during 2007-08. This is an increase of 11 percentage points from 2005-06, and 17percentage points since 2002-03.

¹² Training hours were calculated on a per person, per hour basis (i.e. a 1 hour class with 8 participants is equivalent to 8 hours of training)



- On a weekly basis, community broadcasters participated in a total of 1,415 accredited training hours¹³ at their station. This was an increase of 170 hours per week from the previous survey period, and an increase of 1,097 hours (341%) since 2002-03.



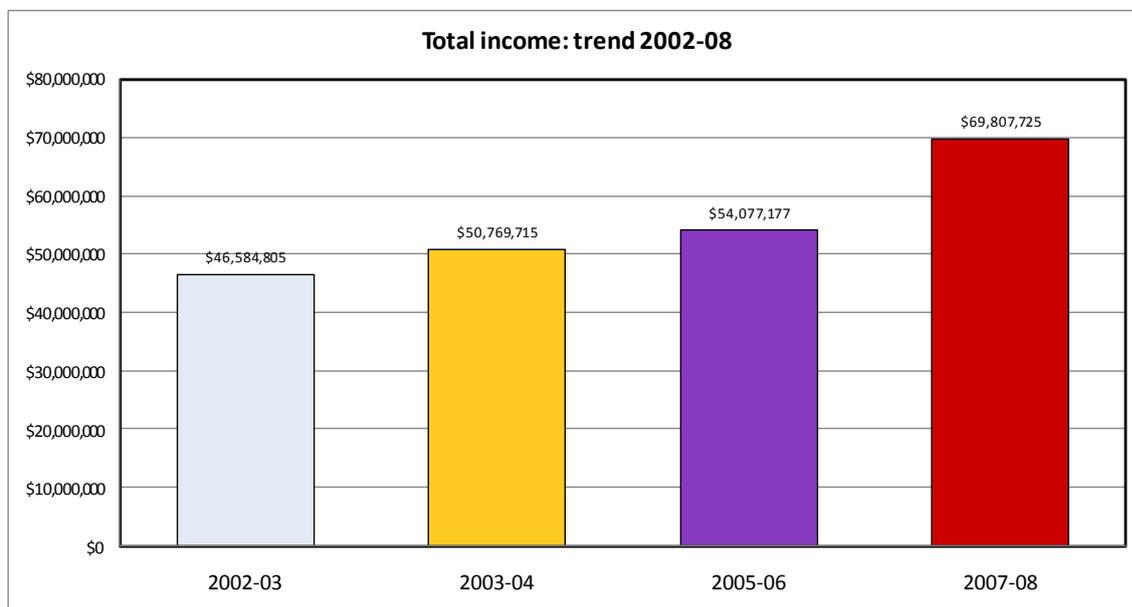
- Nationally, stations reported that a total of 281 qualified trainers/assessors were available to them during the 2007-08 period; 91 of these were in regional areas, 69 in metropolitan areas, 63 in rural areas, and 59 in suburban areas.
- Twenty-two percent of stations generated income from fees charged for training, totally \$316,682 nationally. The average amount generated per station was \$5,183.

¹³ Training hours were calculated on a per person, per hour basis (i.e. a 1 hour class with 8 participants is equivalent to 8 hours of training)

Income

Community radio stations experienced significant revenue growth during the 2007-08 period¹⁴.

- The combined income of all fully licensed radio stations during 2007-08 was \$69,807,725, a rise of 29% over the previous survey period.



- Increases in sponsorship and donation revenue had the greatest impact on the total income for the sector, raising the total income figure above the previous survey's income by \$6.7m and \$2.7m respectively.
- Individual incomes varied widely. At one end of the spectrum there were stations operating on less than \$7,000 per annum, while at the other end some stations in metropolitan areas had turnovers exceeding \$1.5 million. Therefore, the overall average station income figure of \$252,013 can be quite misleading. The median income for the sector was \$77,200.
- Sponsorship income accounted for more than a third of the total income for the sector (41%). Nearly all stations (97%) received some sponsorship income.
- Overall sponsorship for the sector grew significantly. The sector raised \$28,796,972 through sponsorship during the 2007-08 financial period, a 30% increase on the previous survey period.
- The average income per station from sponsorship was \$106,577 (a 33% increase on the previous survey average of \$80,288); however, the income derived from this source varied greatly between stations, from nil to over one million dollars.
- Station location plays a significant part in sponsorship potential, with metropolitan stations achieving the highest amount with an average of \$279,997 per station,

¹⁴ Note, the period covered by this survey was prior to the start of the 2008-09 Global Financial Crisis

whereas stations in rural areas averaged just \$62,828.

- Sponsorship income also varied across specialist interest stations, with youth stations earning the highest amount, averaging \$485,918, followed by fine music stations with \$206,728, and religious stations with \$187,058. While RPH stations were the least dependent on sponsorship, averaging \$27,158.
- Subscription and membership fees accounted for 7% of total sector income, amounting to a total of \$4,816,099, a 22% increase on the previous financial period.
- Donations accounted for 12% of total income, amounting to total \$8,428,534, representing an increase of 46% on the previous survey period.
- Religious stations received the greatest level of support from donors, with an average of \$180,086 per station, followed by fine music stations which averaged \$153,028.
- Recurrent Commonwealth funding for community broadcasting was channelled through the Department of Communications, Information Technology and the Arts - DCITA (now the Department of Broadband, Communications and the Digital Economy – DBCDE) via the sector's funding body, the Community Broadcasting foundations (CBF). Overall CBF grant funding accounted for 7% of total income for the sector, with 67% of stations receiving grants.
- Although community radio stations raise most of their own income, stations may also receive grants from other Australian Government departments, as well as from their respective state and local governments for specific projects or purposes. When this income was added to the funding sourced via the CBF, government grant income accounted for 13%¹⁵ of total station income during the period.
- It is important to note that grant income was unevenly distributed. For instance, Australian Federal Government grants accounted for 3% of overall sector income in the 2007-08 financial year, but only 19% of stations received a non-CBF grant from the Australian Government during the period. Similarly, just 35% of stations received grants from federal, state and local governments combined.
- Income from educational institutions was also restricted with only 1% of stations receiving such funding.
- Stations have the potential to raise income through fees charged for access, production and training services. During the survey period, 50% of stations raised some funds from the provision of these services, accounting for 4% of total sector income.

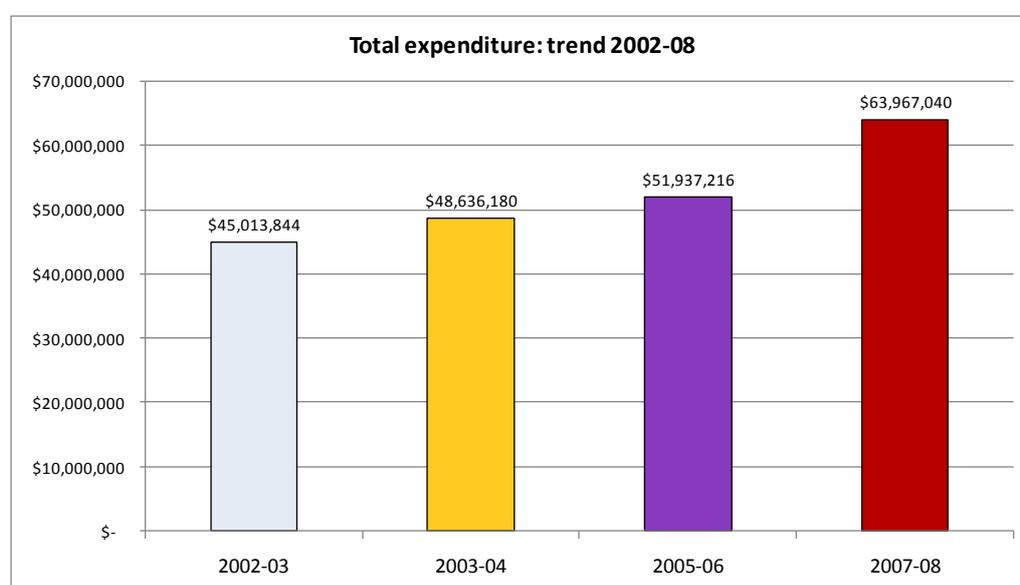
¹⁵ Excluding DCITA (now DEWHA) Indigenous Broadcasting Program grants to Indigenous stations as the relatively high level of funding to just 20 dedicated Indigenous stations would skew the analysis.

Income (ex GST): National, 2007-08 (n=277)				
Income	Total	%	No. stations (weighted)	Average
Educational institutions	\$1,001,905	1%	19	\$53,578
DCITA (now DEWHA) Indigenous Broadcasting Program	\$7,476,135	11%	20	\$373,807
Federal Government grants	\$1,854,527	3%	54	\$34,471
State/Territory Government grants	\$1,663,894	2%	37	\$45,586
Local Government grants	\$269,853	0%	40	\$6,746
CBF grants	\$4,989,459	7%	188	\$26,540
Philanthropic organisation grants	\$598,825	1%	22	\$27,469
Sponsorship	\$28,796,972	41%	270	\$106,577
Subscriptions/ membership fees	\$4,816,099	7%	252	\$19,134
Donations	\$8,482,534	12%	236	\$36,019
Fundraising	\$2,266,418	3%	187	\$12,133
Access fees	\$1,803,850	3%	48	\$37,347
Production/studio fees	\$596,031	1%	75	\$7,979
Training	\$316,682	0%	61	\$5,183
Total Access/ Production/Training	\$2,716,563	4%	138	\$19,685
Other	\$4,874,542	7%	223	\$21,820
Total Income	\$69,807,727	100%	277	\$252,013

Expenditure

In line with the sector's increase in income, total expenditure also grew significantly during the 2007-08 period.

- The combined expenditure of all fully licensed radio stations during 2007-08 was \$63,967,040, a rise of 23% over the previous survey period.



- The average station expenditure was \$230,928 during the 2007-08 financial period, although this varied widely in tandem with station income levels.
- The expenditure category that showed the greatest increase over the previous survey period was salary, wages and oncosts, which rose by 32% from a total of \$23,181,810 in 2005-06, to \$30,486,454 in 2007-08.
- Salary, wages and related on-costs accounted for the single largest expenditure item during the period at 48% of total sector spending; however, as only 61% of stations employ staff, these costs would have constituted a considerably higher proportion of expenditure at those stations.

Expenditure (ex GST): national, 2007-08 (n=277)				
Expenditure	Total	%	No. stations (weighted)	Average
Transmission capital equipment	\$1,127,329	2%	125	\$9,011
Transmitter link	\$1,167,360	2%	162	\$7,188
Other equipment	\$1,193,915	2%	198	\$6,021
Copyright	\$1,588,590	2%	275	\$5,781
Studio/production equipment	\$2,629,496	4%	205	\$12,802
Transmission facility	\$3,357,604	5%	236	\$14,203
Other	\$22,416,292	35%	272	\$82,352
Salary, wage and oncosts	\$30,486,454	48%	175	\$173,910
Total	\$63,967,040	100%	277	\$230,928

Background to the CBOOnline Database project

The aim of the CBOOnline Database project is to provide accurate and reliable statistical information on the operations of community broadcasting stations for use by the sector in planning and promoting its activities, and preparing reports to government.

Information was collected for the Database for the first time in 2003 (2001-02 financial year). Three collections have taken place since then: in 2004 (2002-03 financial year); 2005 (2003-04 financial period); 2007 (2005-06 financial period): and now in 2009 (2007-08 financial period). As of 2005, the data collection has been scheduled to take place every second year.

Because the first collection (2001-02) employed different data gathering and analysis strategies than the subsequent collections, data trends reported here are based on comparisons between the 2002-03, 2003-04, 2005-06 and 2007-08 collections only.

Reports on previous collections are available on the CBOOnline website (go to www.cbonline.org.au > *CBD Statistics* > *CBD Previous Results*). Further information on the 2002-03 collection is published in the Australian Communications and Media Authority report, *Survey of the Community Radio Broadcasting Sector 2002-03* (available from: <http://www.acma.gov.au/acmainterwr/assets/main/lib100068/ctyradiobroadsurvey.pdf>)

Survey approach

The survey data was collected using an online interface hosted on the administrative area of the CBOOnline website. Stations eligible to take part in the survey were allocated a user name and password to access the online survey questionnaire.

Eligible stations were defined as those holding both a full community radio licence and broadcasting at 30 June 2008. A total of 246 community radio licensees were surveyed from a pool of 277 eligible stations, of which 189 stations completed a full survey and the remaining 57 stations completed a short survey. Only the full survey results have been included in this report as they offer readers a more comprehensive picture of the sector's activities during the reporting period.

The statistics do not cover the operations of Remote Indigenous Broadcasting Services (RIBS), community television stations or temporary community broadcasting licensees. Nor do the statistics account for the activities of sector-based organisations, such as the Community Broadcasting Foundation (CBF), the Community Broadcasting Association of Australia (CBAA), the National Ethnic and Multicultural Broadcasters Council (NEMBC), RPH Australia (Radio for the Print Handicapped), Christian Media Australia (CMA), the Australian Indigenous Communications Association (AICA), the Indigenous Remote Communications Association (IRCA), the Australian Community Television Alliance (ACTA) or state or regionally-based community broadcasting bodies.

The following table provides details of the sample strata.

2009 COMMUNITY BROADCASTING DATABASE																
	Metropolitan			Suburban			Regional			Rural			National			
	Full	Short	Universe	Full	Short	Universe	Full	Short	Universe	Full	Short	Universe	Full	Short	Universe	Full completed
Income > \$500	20	0	24	0	0	0	2	0	2	2	0	4	24	0	30	80%
Income < \$500	26	0	27	20	14	43	84	27	111	40	18	66	165	57	247	67%
General	14	0	16	20	14	40	47	26	73	42	18	51	104	55	180	58%
Religious	7	0	9	0	0	0	22	0	22	4	0	4	31	0	35	89%
Indigenous (non RIBS)	3	0	4	0	0	0	1	0	2	10	1	14	14	1	20	70%
RPH	7	0	7	0	0	0	7	0	7	1	0	1	15	0	15	100%
Ethnic	6	0	6	1	0	1	0	0	0	0	0	0	7	0	7	100%
Youth	5	0	5	0	0	0	1	1	3	0	0	0	6	1	8	75%
Seniors/Mature Age	0	0	0	2	0	2	6	0	6	0	0	0	8	0	8	100%
Fine Music	4	0	4	0	0	0	0	0	0	0	0	0	4	0	4	100%
TOTAL	46	0	51	20	14	43	81	25	113	42	18	70	189	57	277	68%

As the table shows, stations were categorised by service type and geographic location. The service types are general community, ethnic, RPH (Radio for Print Handicapped), Indigenous, religious, fine music, seniors/mature-age, and youth. The small number of stations representing the gay and lesbian, specialist music, arts and educational communities were included with general community services for statistical purposes. The categories of geographic location were metropolitan, suburban, regional, and rural.

In order to make efficient use of available resources and ensure that the results of the full survey were statistically representative of the sector as a whole, a sample of approximately 40% of stations was randomly drawn from general community stations turning over less than \$500k per annum and asked to complete the full survey. These stations were distributed disproportionately over the four geographic locations, employing a higher sampling fraction in the smaller universes and a smaller sampling fraction in the larger universes.

All stations turning over more than \$500k per annum were asked to complete the full survey to avoid a small station bias. Similarly, all stations in the specialist service categories (i.e. ethnic, RPH, Indigenous, religious, fine music, seniors/mature age, and youth) were asked to complete a full survey.

Stations that were asked to complete the full survey but declined were offered the option of filling in a short survey.¹⁶ Stations that were asked to complete a short survey but wished to participate more fully in the data collection process were given the option of upgrading to a full survey.

Data analysis

Following the collection and validation of survey data, sample weights were applied to the data to extrapolate sample estimates of the total population of fully licensed community radio stations across Australia. Weights were based on an assessment of the original selection probabilities as well as non-response outcomes within particular sample strata.

¹⁶ The short survey did not include financial questions, as the 2001-02 survey had shown that disclosure of this information was considered too sensitive for a number of licensees.

The specific objectives behind the weighting were to:

- enable the production of statistically valid estimates of the number of stations and their characteristics across the sector as a whole;
- compensate for disproportionate sampling of various sub-groups in the original sample list;
- reduce the potential sample bias that could have arisen from differences between non-respondents and respondents in certain key respects; and
- compensate for non-coverage in the sample due to possible inadequacies in the sample frame or other unknown reasons for non-coverage.

All cells were weighted, with the exception of those pertaining to Community Broadcasting Foundation (CBF) grants. For CBF grants, the actual grant amounts were known and no statistical inference was required. An assessment of the data from the previous surveys has indicated that the final weighted results from the full survey have a high degree of statistical correspondence to the short survey results. This was tested and proved to be the case for the current survey. The use of one dataset also avoids any possible confusion that may arise from the use of the partial dataset (i.e. merged short and full survey results).

Only the aggregate results from the full survey are presented in this report. Analysis of the survey data was undertaken using Microsoft Access and Excel software programs.

Survey data

Important notes about the data and analysis

When viewing the tables and figures readers are advised to refer to the explanatory information below. This information covers important notes about the data and analysis, definitions of terms, and calculation of sample weights. Similarly, when distributing tables it is recommended that the following information be included to ensure they are viewed in context.

- **Small cell sizes:** To prevent identification of individual stations and to avoid readers drawing misleading conclusions based on small sample sizes, no data are reported where cell sizes contain three or less cases. Such cells are denoted by an asterisk.
- **Merging of metropolitan and suburban station information:** The survey showed significant variation between metropolitan-wide licences and limited metropolitan or suburban licences, in the operational nature of stations. The statistics for the combined metropolitan and suburban stations could lead to misleading conclusions in relation to all metropolitan based stations, therefore separate service area statistics are used for metropolitan and suburban stations to avoid drawing misleading conclusions.
- **Rural station financial figures:** In most cases, stations located in areas classified as 'regional' were likely to have larger incomes than those classified as 'rural', due mainly to the larger population bases in which they operate. However, it should be noted that financial figures for rural stations could be distorted by the strong presence of Indigenous stations in these areas (i.e. fourteen are located in rural areas as compared to two in regional areas). This reflects the fact that Indigenous stations derived a larger

proportion of their income from DEWHA Indigenous Broadcasting Program grants, and as such, were less affected by the size of the populations to which they broadcast.

Definitions of terms:

- **General stations:** includes stations that were operating with general community licences aimed at serving broad local community interests. This category also included a small number of licensees that represented the gay and lesbian, specialist music, arts and educational communities.
- **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:** stations located in a 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.
- **RPH:** refers to Radio for the Print Handicapped.
- **RIBS:** Remote Indigenous Broadcasting Services (formerly known as BRACS).
- **Australian music:** music that is performed or composed by a citizen or ordinary resident of Australia.
- **Locally produced content:** content produced at a station for its local audience. This does not include content taken from a satellite or other distribution services or produced by another station.
- **Financial data:** The data covers the 2007-08 financial year.
- **Expenditure – Salaries, wages and on-costs:** gross salaries, salaries and associated on-costs, including commission and retainers as well as superannuation, payroll tax, and other staffing on-costs.
- **Transmission facility:** includes expenses related to a transmission site or transmission facility owned by either the station or a third party (operational costs related to transmission, including equipment/site rentals, electricity and maintenance, provision for transmitter equipment depreciation and/or replacement).
- **Transmission Link:** includes expenses related to linking radio studios with the transmission site/s used by stations (operational costs related to transmitter linking, including equipment/site rentals, electricity, maintenance, transmission link equipment depreciation and/or replacement).

- **Transmission capital equipment:** includes expenses related to the purchase of capital equipment used for transmission and transmitter linking.
- **Expenditure – Other:** includes rent, electricity, telephone/internet, stationery supplies, membership fees, and subscriptions to satellite services.

Calculation of sample weights

The primary goal of the survey was to generate various measures of community radio sector at a national level. Therefore grossing up the stations that did comply to represent all stations was crucial to the overall survey design. The original survey (2001-02), which aimed for a census but achieved a weak self-selecting sample, was found to be significantly biased toward small turnover stations. To reduce the risk of this reoccurring, the 277 stations were split into large and small stations based on a total turnover boundary of \$500k per annum, determined prior to the data collection.

Weights were used to expand the survey data collected from the stations that were:

- in the general group of stations with less than \$500k turnover cells which were sampled; and
- in cells where there were stations that did not complete the full survey.

The methodology for calculating the weights was the same in both cases. The formula being: $\text{Weight} = \text{Universe} / (\text{target sample} - \text{non-respondents})$.