Community Broadcasting Database

Revised Public Release Report
2001/02 Collection

www.cbonline.org.au

CONTENTS

Background

Australia boasts one of the most long-standing and vibrant community broadcasting sectors in the world. Licensing of stations began as early as 1972 and by 1992, 94 community radio licences had been issued[1]. Now there are 337 fully licensed community radio stations (including those servicing remote Indigenous communities), a further 50 groups holding or seeking temporary community radio licences, 76 remote Indigenous community television licences and 5 community television stations[2].

Unless otherwise indicated the statistics below were produced from information collected from stations via the Community Broadcasting Database. More information on the Database is available from http://www.cbonline.org.au.

The figures represent the operations of the 250 community broadcasting stations that were fully licensed and broadcasting by 31 January 2003 and are in respect of the 2001/02 financial year. The statistics do not cover the operations of Remote Indigenous (formerly BRACS) broadcasters, community television stations or temporary radio licensees. For full details about the methodology used for analysing the results, see Attachment A, Overview of Methodology.

In addition, the statistics do not take into account the activities of sector-based organisations, such as the Community Broadcasting Foundation, the Community Broadcasting Association of Australia, the National Ethnic and Multicultural Broadcasters Council or Radio for Print Handicapped Australia, the Association of Christian Broadcasters, the Australian Indigenous Communications Association and state-based community broadcasting bodies.

These organisations play very important roles in the sector with respect to advocacy, advice, professional development and resource provision. They also have staff and/or volunteers, receive government funding, and in some cases, generate income. Their operations have not been included because the purpose of the Database was to report on station activities.

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[1] "Broadcasting in Australia" Australian Broadcasting Tribunal, 1992
[2] Broad-based CTV stations currently operate in Sydney, Lismore, Brisbane, Adelaide, Melbourne and Perth. Until recently they operated with open narrowcast licences. The first long-term CTV licences (Perth and Sydney) were issued on 18 March, 2004

The Statistics

Community broadcasting is nothing if not diverse. Fifty three percent[3] of long-term licensed stations serve an array of different communities of interest, including: people from Indigenous and Ethnic backgrounds; those who are vision impaired or have a reading disability; religious communities; young people or those over 50; people who have a particular interest in the arts or classical music; and in one instance the gay, lesbian or transgender community. Community broadcasting philosophy, as expressed in the sector's Codes of Practice places an emphasis on the provision of access to groups that are inadequately served by mainstream media. Forty seven percent[4]of current long-term licensed stations serve the many and varied interests of a defined geographical community – such 'generalist' broadcasters typically provide a music format incorporating popular and specialist styles, access to airtime for a wide variety of community groups and some specialist services relevant to their service area and its particular demographics (e.g. local news & current affairs, local Arts, Ethnic, Indigenous or RPH programming).

The characteristics of stations can vary according to which community they serve. Location can also be a determining factor in how stations operate. There are stations all over the country, some with metropolitan wide licences (20%), others which service particular areas of a city that hold sub-metro or suburban licences (16%), and those in rural and regional areas (64%)[4]

This diversity means that it is difficult to describe the activities of all stations with one set of figures. Therefore, explanations accompany most of the statistics and it is important that they are considered within the context they have been presented in. In some cases, information from other research initiatives or sources has been used to expand on data collected through the Community Broadcasting Database. Most notably, qualitative research conducted by the Key Centre for Cultural and Media Policy at Griffith University, has been drawn on to enhance statistical information where appropriate.

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. [5]18% of Australian radio listeners regularly listen to community radio – an estimated audience reach of 3.3 million. Recent OzTam figures[6] indicate that community television has established an audience reach during its current trial phase of 3.6 million people.

For more information on the Database or any aspect of the CBOnline Project, please contact us by via email at 'info@cbonline.org.au'.

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[3] Based on an analysis of ABA community radio licence information contained in *Communications Update*, Communications Law Centre, UNSW December 2003 at p.20 (NB. ABA data defines Darwin and Canberra as regional markets).
[4] The percentages of stations located in metropolitan and non metropolitan areas provided are in respect of the 250 fully licensed stations represented by the Database results. They do not include Remote Indigenous community licensees, stations with temporary radio licences or community television stations.
[5] *"Understanding community attitudes to radio content"* ABA , October 2003, p.20.
[6] OzTam Community Television cumulative audience reach 8am -12 midnight, Mon.1 to Wed.31 December 2003.

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Volunteers & Staff

The community broadcasting sector is largely volunteer run. In fact, 98 percent of stations had at least one volunteer and some have more than 400. Overall 17,300 people worked voluntarily at fully licensed stations during the 2001/02 financial year and research conducted by Griffith University puts that figure as high as 20,000 if the contribution of temporary community radio licensees is taken account. The inclusion of community television volunteers would further raise this figure.

The same research indicates that people volunteering at community stations work at least two and half times as many hours as volunteers in other areas and contribute more than $145 million in unpaid work each year[7].

Only 61 percent of stations had any staff at all and the number of staff varied widely from station to station. Therefore, volunteers were involved in every aspect of station operations, from management and on-air presentation, to administration and technical support.

More men than women were involved in all aspects of community radio broadcasting, although the Database results show that the over-representation of males was not great. However, Griffith University research pointed to a disproportionately high number of men in station management positions (i.e. 70 percent of those surveyed).[8]
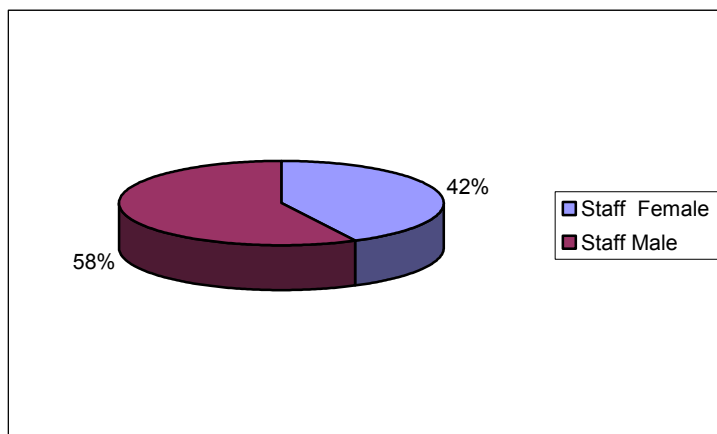
Male & Female Volunteers

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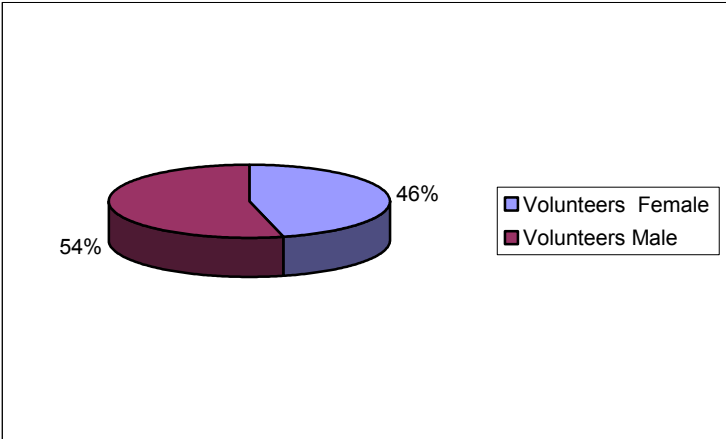
[7] *Culture, Commitment, Community: The Australian Community Radio Sector.* Authors: Susan Forde, Michael Meadows & Kerry Foxwell, Key Centre for Cultural and Media Policy, Griffith University, 2002 , p. 121.
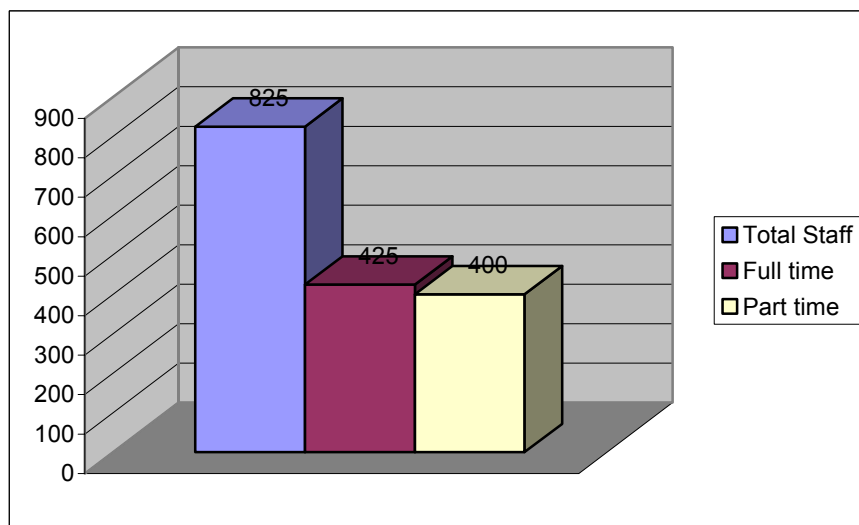[8] Ibid, p.22

Male & Female Staff

Despite their reliance on volunteerism, overall stations employed a significant number of staff. The figures show that 825 people worked on either a full or part-time basis during the period. This is much higher than previous estimates, which puts the figure at around 300.

Staff- Employment Status

Training

The community broadcasting sector plays a very important, yet often unrecognised role in media training in Australia. Although the nature of the training being delivered often makes it difficult to quantify, the figures show that the vast majority of stations recognise the importance of formal training, with 93 percent of stations conducting some form of organised or formal training during the period. Around 70 percent of stations were involved in training programs with external organisations (usually secondary schools, TAFE colleges or universities) and almost all of the 23 journalism programs around Australia were using community radio as a site of work experience for their students.[9]

During the period, 7,350 people were trained – a figure which is significantly higher than previous estimates. In any given week, 2,650 hours of formal training were undertaken at stations across Australia. Eighteen percent of stations offered accredited (nationally recognised) training, with 800 people taking part in certificate level training - something that the sector is very keen to see increase.

Training is not limited to areas directly related to broadcasting. It also covers other relevant skills such as station management, conflict resolution, computer skills, sales and reception[10].

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[9] Culture, Commitment, Community: The Australian Community Radio Sector. Authors: Susan Forde, Michael Meadows & Kerry Foxwell, Key Centre for Cultural and Media Policy, Griffith University, 2002, Executive Summary
[10] Ibid, p.64.

Programming

Community broadcasting provides an outlet for innovative programming, alternative ideas and a diversity of content that is often not available from other sources. It is a valuable source of locally produced content. According to the survey results, 23 percent of stations were either the only radio service in their local area or the only source of local content.

Overall, music programming accounted for most of the programming community broadcasters put to air. Yet over a quarter of content was talks based, including news bulletins and current affairs programs. Eighty-nine percent of stations broadcast news and current affairs programming, although the news services broadcast are often syndicated, with the community radio satellite's National Radio News being the most frequently used service[11].

Community broadcasters play a very important role in supporting local talent, with Australian music accounting for 28 percent of all music broadcast during the period. There were also 275 hours of Australian music recorded by stations in an average week across the sector.

Types of Programming
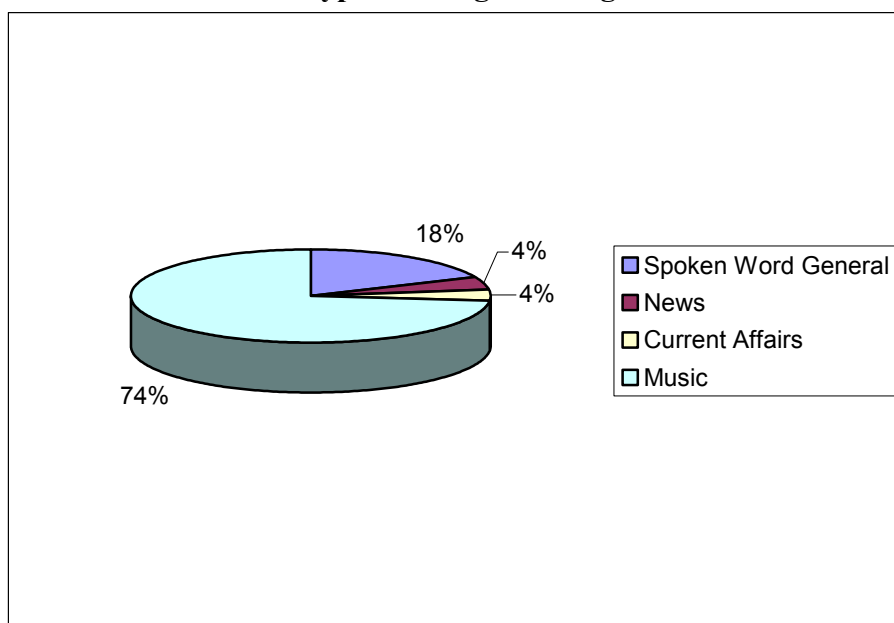
A much more diverse range of music genres make it to air on community radio than on commercial radio. For instance, in the 2001/02 financial year, over 56 percent of stations played country music, jazz, world music, hip hop and electronic music – all genres which do not receive a lot of airplay on commercial radio.

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[11] *Culture, Commitment, Community: The Australian Community Radio Sector.* Authors: Susan Forde, Michael Meadows & Kerry Foxwell, Key Centre for Cultural and Media Policy, Griffith University, 2002. p. 84

Music Genres by Number of Stations
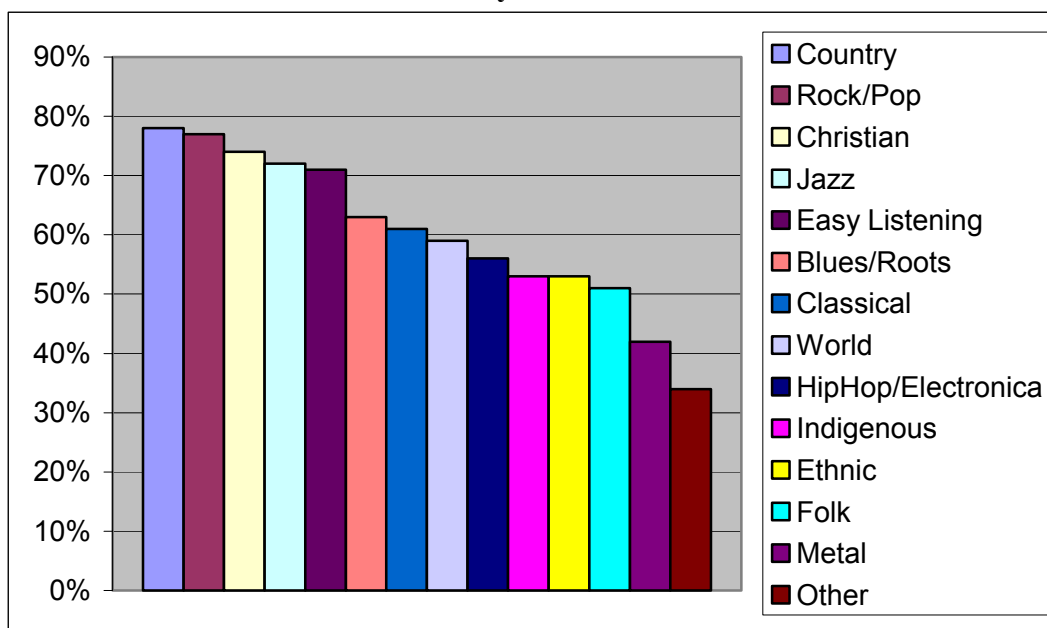
The genres shown represent only a portion of those played on community radio. For example, the styles included in the 'other' music category include nostalgia, show tunes, Irish, swing, soul, funk, experimental, Scottish and reggae.

For more detailed information about music programming, contact the Australian Music Radio Airplay Project, AMRAP.

Stations produce the vast majority of what they put to air themselves – 79 percent of it in fact. The majority of the remainder of programming broadcast during the period came from one of the sector's three satellite services, ComRadSat (11 percent), the National Indigenous Radio Service, NIRS (3 percent) or the Radio for Print Handicapped satellite (1 percent). Five percent of content came from other satellite services, including the BBC and Germany's Deutsche Welle.

Program Sources
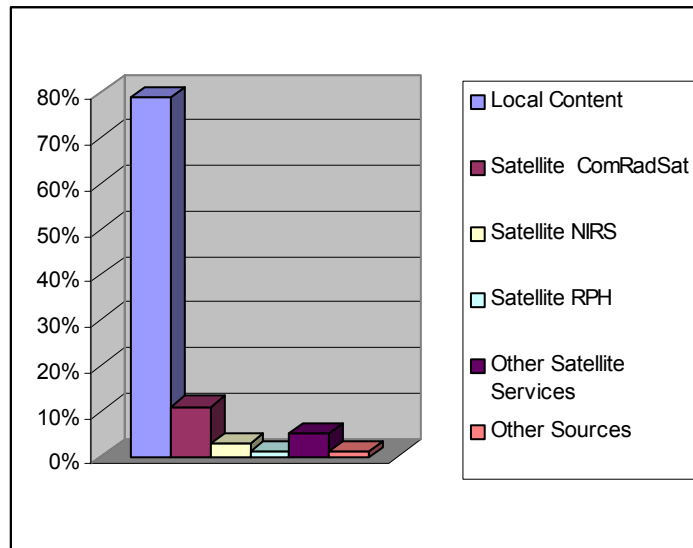
Community broadcasters may serve a particular community (eg. Indigenous, Ethnic, Radio for Print Handicapped, Religious) or they may provide programming for an array of interest groups. Therefore, a station does not have to have a dedicated Ethnic focus to broadcast ethnic programming. In fact, 100 stations (or 40 percent of the sector) broadcast 1,571 hours weekly of programming aimed at people from non-English speaking backgrounds, in 100 languages. When the contribution of community television and temporary radio licensees are taken into account, upwards of 1700 hours of ethnic programming was being aired weekly during the 2001/02 financial year.

Indigenous, religious and nationally recognised Radio for Print Handicapped (RPH) programming is also widespread. Seventy-two percent of stations broadcast religious programming, 40 percent air programs aimed at an Indigenous audience, and 12 percent put RPH programming to air.

Weekly Hours of Special Interest Group Programming
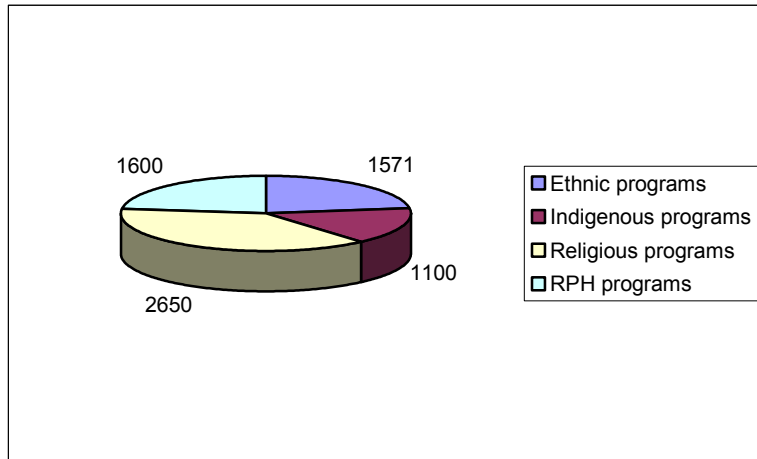
It should be noted that the above figures are influenced by the contributions of stations licensed to serve specific interest groups on a full-time basis. There were 6 Ethnic, 12 RPH, 20 Indigenous and 31 Religious stations operating with full licences during the period. In addition, the hours of Indigenous programming would be significantly higher had the 76 Indigenous Remote community radio licensees been involved in the Database survey.

Subscriber/Donators

The culture of having a member or subscriber base is an important characteristic of most community stations. Not only does this allow for a degree of community participation to be extended beyond the walls of the stations itself, but it also provides a source of revenue. During the period, an average of 12.5 percent of stations income came from subscriptions, membership fees or donations (see *Finances* for more information).

During the period, 34,250 people donated money to a station and around 107,000 people were either subscribers or members. This is an average of 69.2 per station, although it should be noted that the ability of stations to attract subscribers varies substantially between metropolitan and regionally based stations due to the disparity in population density. Stations with metropolitan-wide licences had an average of 1454 subscribers, those with sub-metro or suburban licences had 287 and the average numbers of volunteers at stations based in regional or rural areas was 139.

Technical Resources

The community broadcasting sector has come a long way in a relatively short period of time where technical resources are concerned. For example, a 1997 Community Broadcasting Foundation report[12] stated that in a sector survey conducted in March of that year 40 percent of stations responding had some form of access to email and 35 percent had an internet connection. Now 90 percent of stations have internet access on the premises and 98 percent of all stations have at least one computer, with more than half having more than five.

The recent advent of the Digital Delivery Network (DDN), exemplifies the sector's innovative nature. The project which was developed specifically for the community radio sector provides stations, through the use of specialised computers linked to the sector's ComRadSat satellite channel and the Internet, with the facilities for the online ordering and automated capture storage and retrieval of national programs and any audio or data file. Many stations have been quick to embrace new technology - 67 percent of stations used at least one computer as a broadcasting play-out source during the period.

In addition, over 70 percent of stations had at least one studio set aside for production –something which points to the increasing professionalism across the sector.

On the other hand, 71 percent of stations had more than one studio, which means of course that 29 percent of stations did not– something that makes production and training extremely difficult. And of those that had more than one studio, only 28 percent had one set aside especially for training purposes. Similarly, while half of all stations had fully networked computers, 20 percent had only partially networked systems and 30 percent of stations had no computer networking whatsoever. Finally, while a lot of stations are at least experimenting with computer play-out systems, a third of stations had not.

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[12] *Community Access Network and Broadcasting Database Report,* prepared by Dr. Jeff Langdon for the CBF New Initiatives Advisory Group, May 1997.

Finances

The total economic and social benefits stations bring to their communities cannot be readily quantified in dollar terms. Most stations depend heavily on volunteers (see Volunteers & Staff). Many also receive in-kind support from their communities in various forms ranging from free or subsidised premises, to donated prizes for subscription drives. According to the Database figures, the combined income of all fully licensed radio stations during the period was $41,887,292 (exclusive of GST).

Individual station incomes vary widely. At one end of the spectrum, there were regional stations operating on less than $5,000 gross per annum. At the other end, the turnover of some stations in metropolitan areas exceeded $750,000 during the period. As a result, average station income was distorted by the incomes of very large stations. For example, while the average overall income was $167,549 per station, the median[13] figure was only $116,772.

To expand on the picture, the average income of stations in regional areas was $102,861, while stations operating with metropolitan-wide licences averaged $410,669 during the period. In both these groups the median income was significantly less than the average (i.e. $90,537 and 324,468 respectively), pointing again to stations with larger incomes in each group skewing the figures. This trend is not applicable to stations holding limited metropolitan or suburban licences. In their case, the average income was $88,267, while the median figure was $91,801. This points to there being some suburban stations with very low incomes.

Note that all figures are shown exclusive of Goods and Services Tax (GST).

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[13] The 50th percentile or middle value in a distribution, above and below which lie an equal number of values.

Sources of Revenue
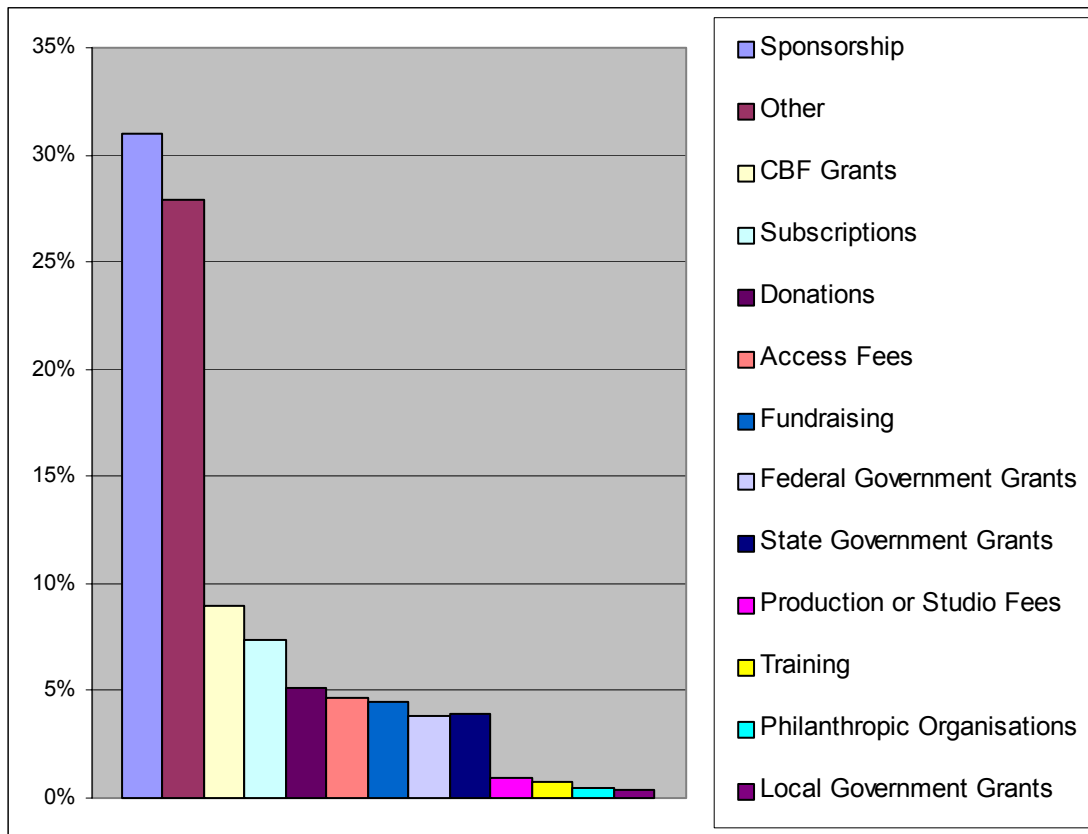
Note: '*Other Income' is made up of miscellaneous income for all stations and income received by a proportionally small number of stations from either educational institutions or via the Aboriginal and Torres Strait Islander Commission (ATSIC).*

Specific community broadcasting funding is channelled from the Federal Government's Department of Communications, Information Technology and the Arts (DCITA) via the sector's funding body, the Community Broadcasting Foundation (CBF). However, not all stations apply for or receive any CBF funding, and overall it accounts for just nine percent of total average station income.

Stations may also receive grants from other Federal Government departments, as well from their respective State and Local Governments for specific projects or purposes.

When this income was added to the funding channelled through the CBF, government grant income accounted for 17 percent* of total station income during the period. However, it is important to note that grant income is unevenly distributed. For instance, state government grants accounted for just under four percent of overall station income across the sector in the 2001/02 financial year, but only 19 percent of stations received a grant from their state government during that period. The situation is similar in the case of federal and local government grants and those from philanthropic organisations, as displayed in the graph below.

Excluding ATSIC operational grants to Indigenous stations

Percentage of Stations Receiving Grants
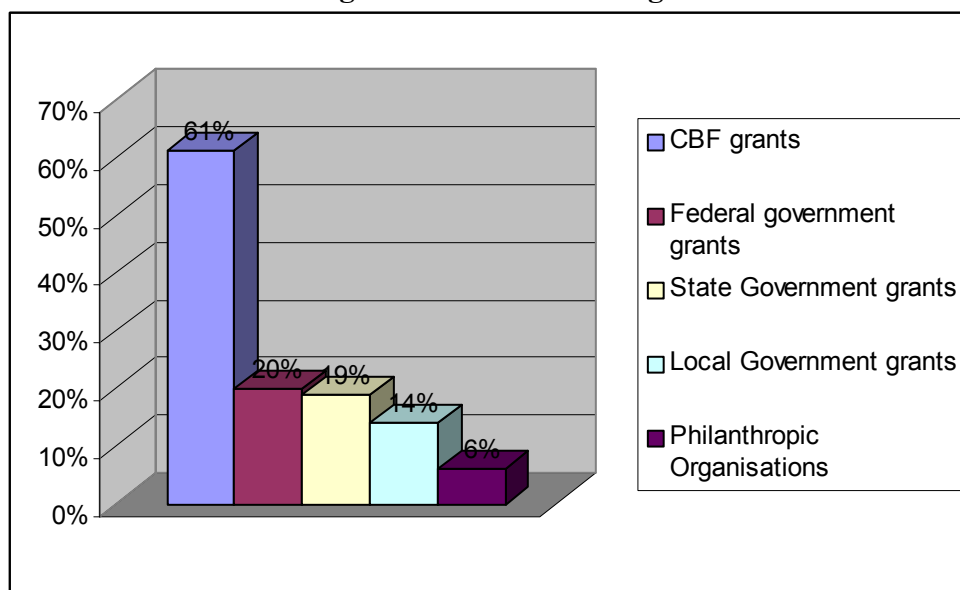
Training income too is restricted, with just over a quarter of stations receiving any income from training fees during the period.

Total station expenditure during the period was $39,369,298. While aggregated station income exceeds expenditure this does not take into account the essential provision required for depreciation of infrastructure. Few stations possess significant reserves. Stations generally operate on minimal budgets tailoring their expenditure to income earned.

Wages, salaries and related on-costs accounted for the single largest expenditure item are during the period at 38 percent of total average station spending.

The purchase of capital equipment ran to close to $3,000,000 for the period. In addition, copyright fees are a significant expenditure area for stations, at just over $900,000 or 2.3 percent of total income.

Finally, the Database figures show that during the period just under $2,000,000 was paid by stations for transmission related costs, including site access fees, during the period. Transmission related costs vary widely. Factors such as station location and the size of its transmission area can influence the amount paid, but there are stations with similar coverage / technology that face radically different arrangements[14].

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[14] *Affordable Transmission Access for Community Broadcasters*, prepared by David Sice for the CBAA, September 2003. Available at http://www.cbonline.org.au.

Attachment A:

Community Broadcasting Database
2001/02 Financial Year Collection

Overview of Methodology

The figures are in respect of the 2001/02 financial year, except in the case of a small number of stations which have accounting systems based on a calendar year. In these instances the 2002 calendar year has been used.

For the purpose of analysing and weighting the results, respondent stations were divided into cells based on their service type and service area. All stations were allocated to one of the following cells*: General Regional; General Metro; General Sub Metro/Suburban; Ethnic; RPH Metro; RPH Regional; Indigenous Metro; Indigenous Regional; Religious Metro; Religious Regional.

Respondents that fell into each of these groups were used to represent their non-respondent counterparts. This process is referred to as weighting. All figures presented from the data collection have been weighted, with the exception of those pertaining to Community Broadcasting Foundation (CBF) total grants and hours of Ethnic programming. This is owing to the fact that actual numbers of CBF grants and Ethnic programming hours were known and no statistical process being required. Instead, simple averages were used to calculate a per station average.

Stations were invited to participate voluntarily in the survey. The final 'universe' (i.e. all stations which are represented by the figures extrapolated from the respondent group) consists of those stations that were both fully licensed and broadcasting as at 31 January 2003 – at total of 250. Of these, 142 were considered to be fully compliant. Therefore, the respondent group represents 56.8% of the universe.

In order to compensate for a perceived small station bias in the respondent group, an uplift factor was introduced. This was used to produce a total station income figure and applied to any question with a strong correlation to total income (i.e. 'Total Employed Staff', 'Number of Computers' and 'Total Effective Full-Time Staff').

*Notes on Cells:

- o *The 'General' category includes stations licensed as generalist stations in addition to fine music, gay and lesbian, arts, youth and senior or mature age licensees.*

- o *'Regional' includes stations in rural and remote areas (excluding Indigenous Remote Service Providers or BRACS units).*