



**Community Broadcasting Database
Public Release Report
2002/03 Collection
www.cbonline.org.au**

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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 issued¹. At the time of the collection there were 341 fully licensed community radio stations² (including those servicing remote Indigenous communities), a further 54 groups holding or seeking temporary community radio licences, 76 remote Indigenous community television licences and 6 community television stations³.

Unless otherwise indicated, the statistics below were produced from information gathered from stations in the second round collection for the Community Broadcasting Database held in May/June 2004. For more information about the Database visit the CBOonline website (www.cbonline.org.au).

The 2004 figures represent the operations of the 262 community radio stations that were fully licensed and broadcasting by 30 June 2003 and are in respect of the 2002/03 financial year. The statistics do not cover the operations of Remote Indigenous communication services (formerly BRACS)⁴, community television stations⁵ or temporary radio licensees. Full details about the methodology used for collecting and analysing the results is available on request.

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, RPH Australia, the Association of Christian Broadcasters, the Australian Indigenous Communications Association, the Indigenous Remote Communications Association or 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 is to report on station activities.

Information was collected for the Database for the first time in 2003. A separate report of the results is available at on the CBOonline website (go to www.cbonline.org.au and click on *Statistics 04*, then *Previous Years*). However, it should be noted that different data gathering and analysis strategies were employed for the two collections, therefore conclusive comparisons cannot be drawn between the two sets of results.

¹ "Broadcasting in Australia" Australian Broadcasting Tribunal, 1992

² As at 4 August 2004 there were 344 full licensed community radio stations

³ 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, another was issued for Brisbane on 16 July, 2004 and on 30 July 2004 a long-term licence was issued for Melbourne.

⁴ A separate survey of Remote Area Communication Services is currently underway.

⁵ The inaugural CTV survey will be undertaken in 2005.

The Statistics

The Australian community broadcasting sector is very diverse. Fifty three percent⁶ of long-term licensed stations serve an array of different communities of interest, including: people from Indigenous and Ethnic backgrounds; those who have a print 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 percent⁷ 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 regional (36%) and rural (28%) areas.⁸

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 in which they have been presented. 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.⁹ According to the latest research in an average month 45 percent of Australians over 15 years of age listen to community radio – an estimated audience reach of over 7 million people. Each week community radio commands an average audience of 3.7

⁶ 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).

⁷ Ibid

⁸ The percentages of stations located in metropolitan and non metropolitan areas provided are in respect of the 262 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.

⁹ "Understanding community attitudes to radio content" ABA, October 2003, p.20.

million listeners or 24 percent of all Australians 15+.¹⁰ Recent OzTam figures¹¹ 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 CBOOnline Project, please contact us the CBOOnline Content Manager, Mia Lauze by email at mlauze@cbonline.org.au or contact her on (02) 9318 9619.

¹⁰ National Audience Research Project, McNair Ingenuity Research, September 2004

¹¹ OzTam Community Television cumulative audience reach 8am -12 midnight, Mon.1 to Wed.31 December 2003.

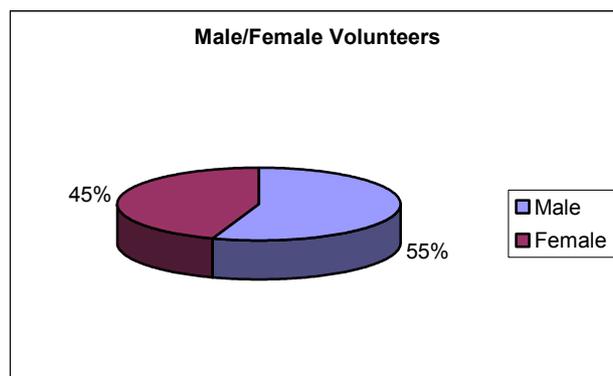
Volunteers & Staff

Volunteers play a vital role in the community broadcasting. In fact, 99 percent of stations had at least one volunteer and a small number had in excess of 400. In total 20,507 people worked voluntarily at fully licensed community radio stations during the 2002/03 financial year. This does not take into account the number of people who volunteered their time at stations with temporary community radio licensees or those who worked in a volunteer capacity at community television stations.

Research conducted by Griffith University 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 year¹².

Only 55 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.

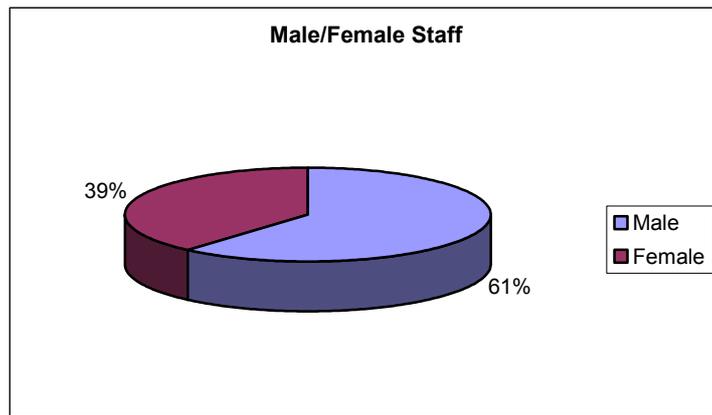
The Database results show that 10 percent more men than women volunteered in community radio broadcasting during the period. Furthermore, Griffith University research pointed to a disproportionately high number of men in station management positions (i.e. 70 percent of those surveyed).¹³



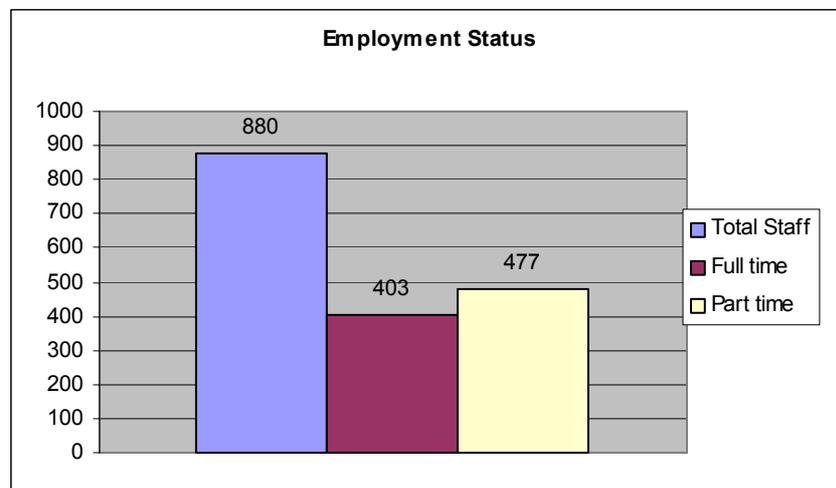
The over-representation of males was greater in the case of staff, with women accounting for less than 40 percent of employees.

¹² *Culture, Commitment, Community: The Australian Community Radio Sector*. Authors: Susan Forde, Michael Meadows & Kerrie Foxwell, Key Centre for Cultural and Media Policy, Griffith University, 2002, p. 121.

¹³ *Ibid*, p.22



Despite their reliance on volunteerism, a significant number of people were employed at stations during the 2002/03 financial year. The figures show that 880 people worked on either a full or part-time basis during the period.



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 85 percent of stations conducting some form of organised or formal training during the period. Research conducted previously showed that 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 to provide work experience for their students.¹⁴

During the period, 8,258 people received training through a community radio station. In any given week, 2,227 hours of formal training were undertaken at stations across Australia. Furthermore, 16 percent of stations offered accredited (nationally recognised) training, with 660 people taking part in certificate level training during the period, accounting for 317 hours per week of overall training undertaken.

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 reception¹⁵.

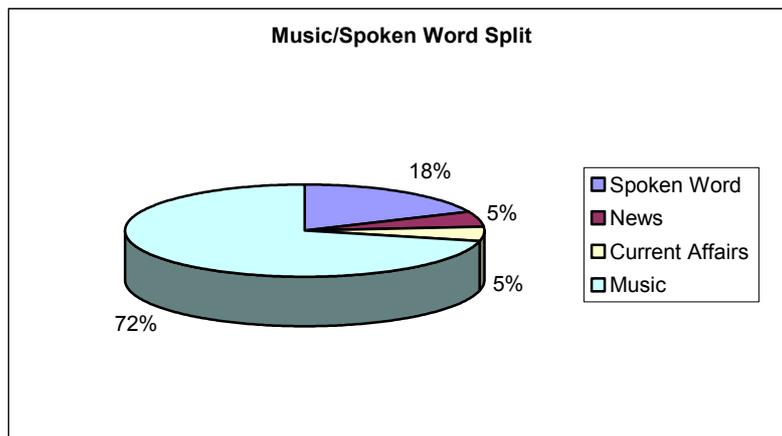
¹⁴ Culture, Commitment, Community: The Australian Community Radio Sector. Authors: Susan Forde, Michael Meadows & Kerry Foxwell, Key Centre for Cultural and Media Policy, Griffith University, 2002, Executive Summary

¹⁵ 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, 35 percent of stations located in rural and regional areas were either the only radio service in their local area or the only source of local content. In addition, the 16 percent of stations that operate with limited metropolitan licences are often the only radio services providing local news and information to the suburbs they broadcast to.

Music programming accounted for most of what community broadcasters put to air overall, yet over a quarter of content was talks based, including news bulletins and current affairs programs. These figures can vary significantly between stations serving specialist communities. For instance, full-time Ethnic stations broadcast just under 60 percent talks or spoken word content on average. In the case of RPH stations, which cater for people with print disabilities, 97 percent of content is talks-based.

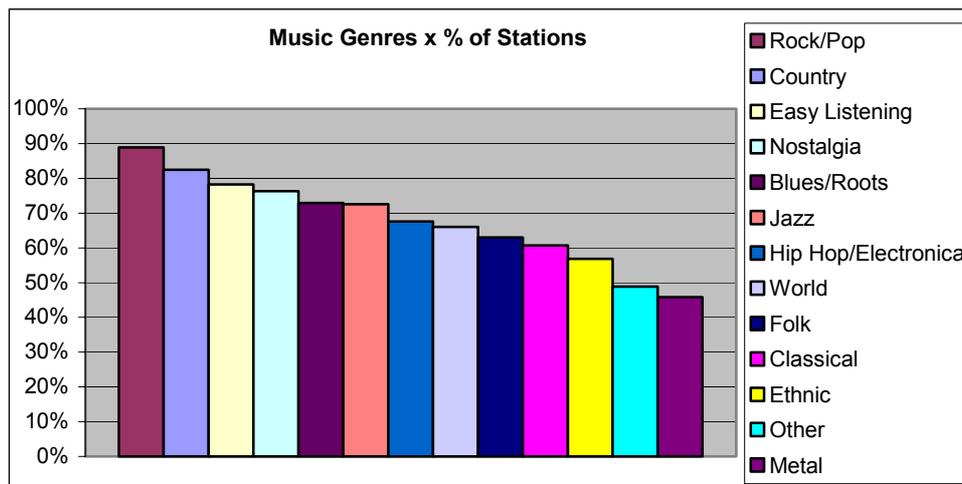


Ninety-two percent of stations broadcast news bulletins, although the news services are often syndicated, with the community radio satellite's National Radio News being the most frequently used service¹⁶. Three-quarters of stations also offer current affairs programming.

Community broadcasters play an extremely important role in supporting local talent and developing local culture. The sector's Code of Practice sets a quota of 25 percent Australian music with exceptions for Ethnic and Fine Music broadcasters who have a quota of 10 percent. During the survey period, the sector exceeded its minimum quotas for Australian music reaching an average of 32 percent.

In addition, the practice of recording local musicians for rebroadcast is common amongst many community stations and during the period, 409 hours of Australian music sourced in this manner were broadcast across the sector during an average week.

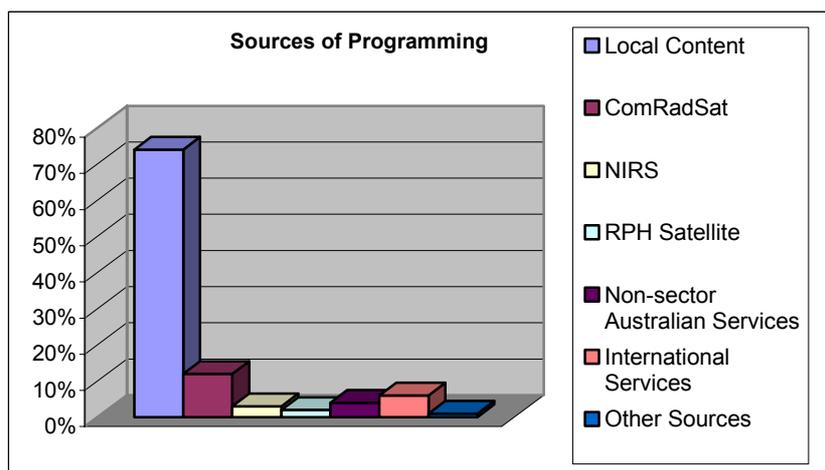
¹⁶ *Culture, Commitment, Community: The Australian Community Radio Sector*. Authors: Susan Forde, Michael Meadows & Kerry Foxwell, Key Centre for Cultural and Media Policy, Griffith University, 2002. p. 84



The figures also reflect the diversity of music broadcast throughout the sector, particularly as compared with other broadcasting sectors. The genres shown represent only a portion of those played on community stations. For example, the styles included in the 'other' music category ranged from experimental, avant-garde and reggae to show tunes, hymns and Scottish and Latin music.

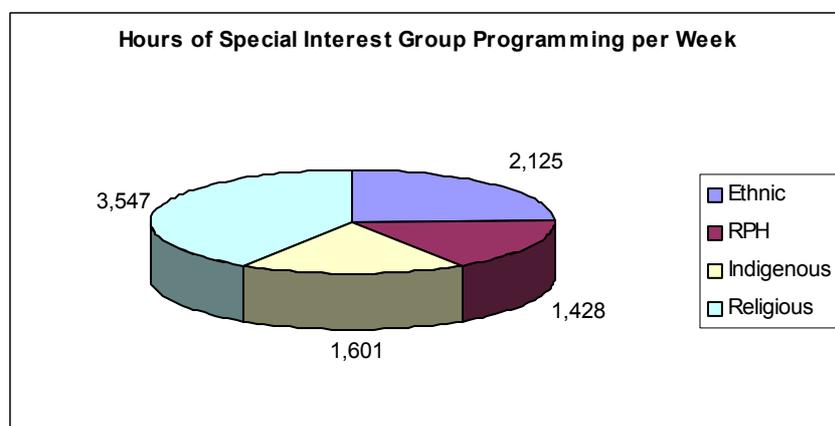
Indigenous and religious music were categorised as overarching types of music, which were further broken down into style or genre (e.g. Indigenous – country). Airplay of both these broad music genres was widespread in the community broadcasting sector during the period, with 63 percent of stations broadcasting Indigenous music and 84 percent airing religious music. In total there were 1,174 hours of Indigenous music and 4,132 hours of religious music played in an average week. For more detailed information about music programming contact the Australian Music Radio Airplay Project, AMRAP (www.amrap.org.au).

Stations produce 74 percent of the programming they broadcast themselves. A significant amount of the remainder of programming aired during the period came from one of the sector's three satellite services, ComRadSat (12 percent), the National Indigenous Radio Service, NIRS (3 percent) or the RPH satellite (2 percent). A further 4 percent of content came from other national satellite services or program networks including CAAMA and PAKAM (providers of Indigenous programming) and Vision FM, a Brisbane-based religious programming service. A further six percent of what is put to air comes from international satellite services, including the BBC and Germany's Deutsche Welle.



Community broadcasters may serve a particular community (eg. Indigenous, Ethnic, Print Disabled, 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. Forty-seven percent of the stations broadcast 2,125 hours weekly of programming aimed at people from non-English speaking backgrounds every week.

Indigenous, religious and RPH programming for people with print disabilities is also widespread. Seventy-six percent of stations broadcast religious programming, 37 percent air programs aimed at an Indigenous audience, and 16 percent put RPH programming to air.



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, 14 RPH, 22 Indigenous and 34 Religious stations operating with full licences during the period. In addition, the hours of Indigenous programming would be significantly higher had 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 station itself, but it also provides a source of revenue. During the period, an average of 17 percent of station income came from subscriptions, membership fees or donations (see *Finances* for more information).

During the period 113,370 people were either subscribers or members of a fully licensed community radio station. While this represents an average of just under 433 subscribers per station, it should be noted that the ability of stations to attract subscriptions and/or membership varies substantially between stations in different locations due to differences in population density. For instance, the average number of people who subscribe to metropolitan-based stations was 1350, for suburban and regionally-based stations the figure is 268, while stations in rural areas only attracted an average of 74 subscribers each.

In addition, 36,470 people donated money to a station during the period. As with subscribers, the number of donators varied substantially between service areas. Stations with metropolitan-wide licences received donations from an average of 600 people, whereas the figure was 37 for regional stations and 10 each for suburban and rural stations.

Technical Resources

The trend to computer and electronic working is increasing markedly.

In 1997 a Community Broadcasting Foundation report¹⁷ found that 40 percent of stations were using email and 35 percent had an Internet connection. Now 89 percent of stations have onsite Internet access, and 98 percent have at least one computer used for administrative purposes, with just under half having more than five computers.

The advent of the Digital Delivery Network (DDN) exemplifies the sector's innovative nature. The DDN was borne of need for a cost effective way to share program resources and was developed specifically for the community sector. Through the use of computers linked to the ComRadSat satellite channel and the Internet, it provides stations with:

- facilities for the online ordering;
- automated capture, storage and retrieval of national programs;
- and delivery of audio or data files.

The DDN fits neatly into the trend for broadcast use of computers by stations. 80 percent of stations use at least one computer as a broadcast play-out source during the period and 91 percent use computers for audio production.

More needs to be done to encourage the availability of computer based resources across all broadcast and production studios within stations. Only 43 percent are fully networked, and 20 percent are not networked at all.

An encouraging 71 percent of stations have dedicated facilities for production. On the other hand, it is of concern that over a third of stations have only one broadcast studio, with no backup. Only 34 percent have a studio suitable for training.

Transmission is an area of major concern for community broadcasters. Only 69 percent enjoy reception coverage on par with other broadcasters in their areas. In addition, with 60 percent of stations leasing either their transmission site and/or facilities from a third party, the increasing cost of transmission is a major concern. For more information, refer to the sector technical consultant's report *Affordable Transmission Access for Community Broadcasters* available on the CBOonline website (go to www.cbonline.org.au and click on *Resources*).

¹⁷ *Community Access Network and Broadcasting Database Report*, prepared by Dr. Jeff Langdon for the CBF New Initiatives Advisory Group, May 1997.

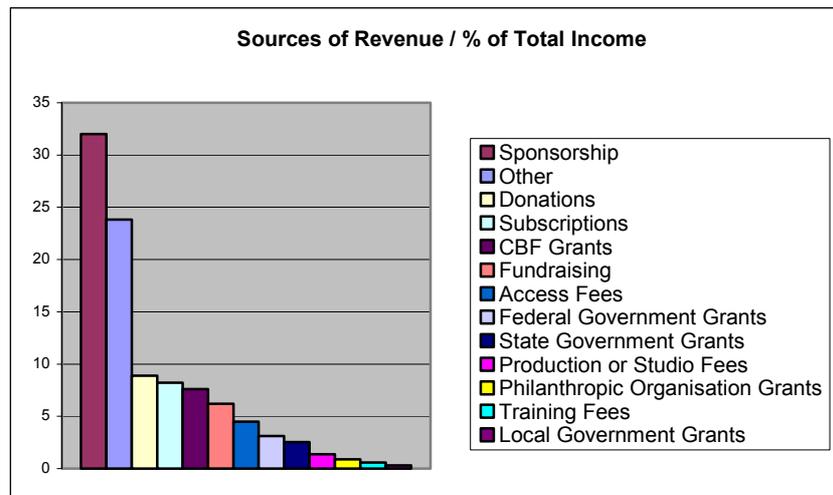
Finances

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*, p.6). Many also receive in-kind support from their communities in various forms ranging from free or subsidised premises or transmission facilities, to donated prizes for subscription drives. According to the Database figures, the combined income of all fully licensed radio stations during the period was \$46,584,808. The Community Broadcasting Foundation has estimated that the turnover of community broadcasting sector as a whole exceeds \$200m. per annum when the value of volunteer labour is recognised.

Individual station incomes vary widely. At one end of the spectrum, there were stations in rural and regional areas 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. Therefore, the overall average station income figure of \$177,805 can be quite misleading.

To expand on the picture, the average income of stations in rural and regional areas was \$96,536, while stations operating with metropolitan-wide licences averaged \$504,246 during the period. In the case of stations holding limited metropolitan or suburban licences the average income was \$93,083.

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



| Revenue Source | Per Station Average | Total Station Income | Percentage of Total Income |
|-----------------------------------|---------------------|----------------------|----------------------------|
| Sponsorship | 56,359.83 | 14,766,275.46 | 32 |
| Other Income | 43,490.34 | 11,394,469.08 | 24 |
| Donations | 15,742.00 | 4,124,404.00 | 9 |
| Subscriptions | 14,441.09 | 3,783,565.58 | 8 |
| CBF Grants | 13,360.65 | 3,500,490.30 | 8 |
| Fundraising | 10,891.11 | 2,853,470.82 | 6 |
| Access Fees | 7,873.15 | 2,062,765.30 | 4 |
| Federal Government Grants | 5,567.55 | 1,458,698.10 | 3 |
| State Government Grants | 4,552.13 | 1,192,658.06 | 3 |
| Production or Studio Fees | 2,400.22 | 628,857.64 | 1 |
| Philanthropic Organisation Grants | 1,558.36 | 408,290.32 | 1 |
| Training Fees | 1,016.65 | 266,362.30 | 1 |
| Local Government Grants | 551.53 | 144,500.86 | 0 |
| Total Income | 177,804.61 | 46,584,807.82 | |

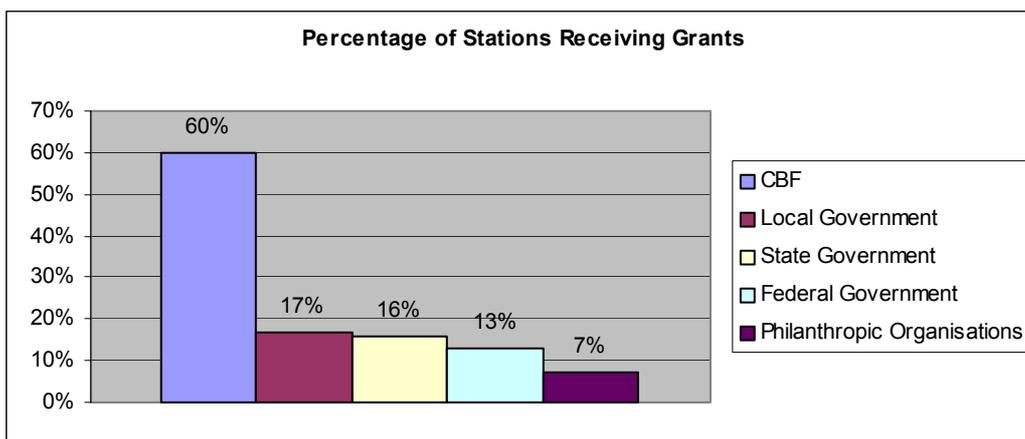
Note: 'Other Income' is made up of miscellaneous income for all stations and income received by a proportionally small number of stations from either educational institutions or via the Aboriginal and Torres Strait Islander Commission (ATSIC).

Recurrent Commonwealth funding for community broadcasting is channelled from the 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 eight 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 14 percent¹⁸ of total station income during the period.

It is important to note that grant income is unevenly distributed. For instance, state government grants accounted for two and half percent of overall station income across the sector in the 2002/03 financial year, but only 16 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.

¹⁸ Excluding ATSIC operational grants to Indigenous stations



Training income too is restricted with less than a quarter of stations receiving any income from training fees during the period.

Total station expenditure during the period was \$45,013,842, an average of \$171,809 per station. 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 during the period at 42 percent of total average station spending.

The purchase of all capital equipment was \$4,613,482 for the period, accounting for over 10 percent of total expenditure. In addition, copyright fees are a significant expenditure area for stations at just over \$1,157,500 or 2.6 percent of total expenditure.

Finally, the Database figures show that during the period \$4,041,620 was paid by stations for transmission related costs, including site access fees and transmission linking costs during the period (excluding transmission equipment purchase). 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 arrangements¹⁹.

¹⁹ *Affordable Transmission Access for Community Broadcasters*, prepared by David Sice for the CBAA, September 2003. Available at (link to paper on CBOonline website).