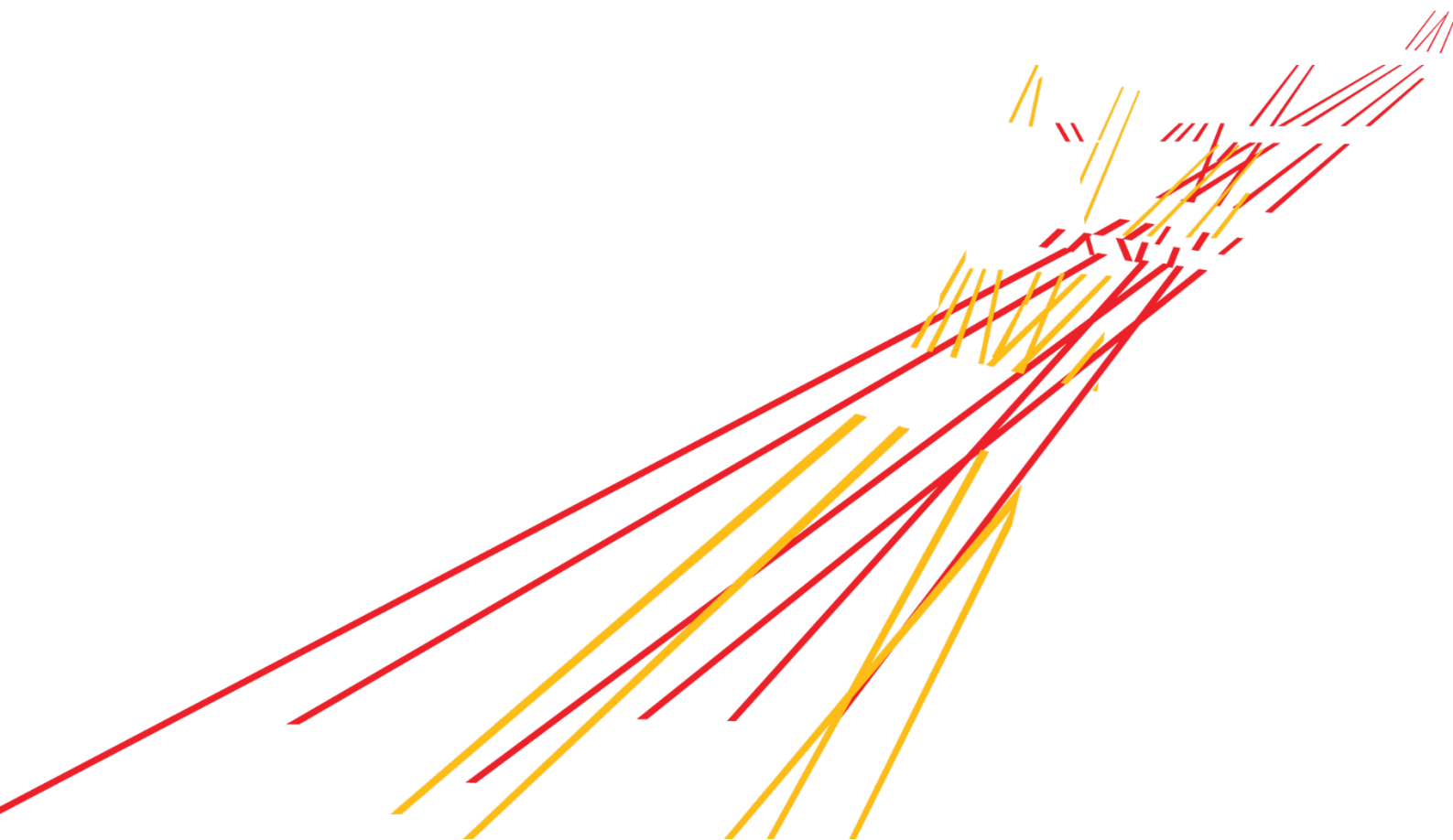# ROADMAP/ 2033/

Discovery Insights

Community Broadcasting in Australia, April 2023

We would need a rethink within the [community broadcasting sector] about what it can be, choosing what it should be in the 21st century and redescribe that to its key stakeholders. Internally, it is to have a roadmap for how each station can bring that vision to life. Everything from forums to resources. Stations need to refresh themselves through their community.

Andrea Ho
Australian Film Television and Radio School

When you are struggling financially, all you can think about is survival. The Roadmap will help the sector representative organisations think about where they will go.

Adam Carlon
Assistant Secretary, Media Industry and Sustainability
Department of Infrastructure, Transport, Regional Development, Communications, and the Arts

Contents

About *Roadmap 2033*

Roadmap 2033 will provide a long-term strategy for community broadcasting in Australia. It will define the shared goals of community broadcasters and the outcomes the community broadcasting sector (the 'sector'), as a whole, want to see, for stations and sector organisations, for listeners and viewers, staff and volunteers, and for our communities.

Roadmap 2033 will detail the steps that need to be taken and how we will measure and govern our progress as we meet the milestones on the road to our shared vision. It will also serve as a communication tool – a high-level document that helps articulate our values and strategic thinking. It will be developed *by* the sector *for* the sector.

The project is jointly sponsored by the Community Broadcasting Foundation (CBF) and the Community Broadcasting Association of Australia (CBAA). The development of *Roadmap 2033* is being facilitated by the for-purpose consultancy, *THINK: Insight & Advice*, led by Randall Pearce.

Roadmap 2033 progresses through five phases from November 2022 to June 2023.

Learning

- **Environmental scanning**
  - Research to identify trends that may potentially influence the community broadcasting sector positively or negatively over the next decade
- **Data analysis**
  - Review of current and future data capture and analysis which may be used to shape the Roadmap and measure progress against it in future

Discovery
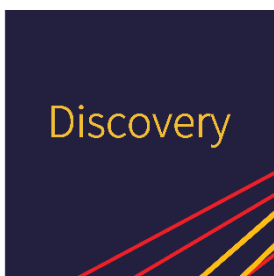
- **Stakeholder interviews**
  - 22 one-on-one in-depth interviews with thought leaders and opinion makers from inside and outside the community broadcasting sector
- **Sectional focus groups**
  - 10 focus groups organised around the key community broadcasting community interest and practice

Collaboration

- **Leadership forums**
  - Reference group workshops convened with a small, representative sub-set of leaders of the community broadcasting sector
- **Values process**
  - A values survey fielded among participants sector-wide
  - A values workshop to translate common values into shared behaviours that can help guide Roadmap implementation

Co-design

- **Sector Congress**
  - A co-design workshop bringing together an equal number of station representatives and sector leaders to consider proposals for action
- **Conversation circles**
  - Informal groups are invited to talk through the questions posed in a Discussion Paper and provide their input

Consensus

- **Consultation groups**
  - Eight consultation groups held with station representatives nationwide to review and refine the proposals for action
- **Government consultation**
  - Consultation process with government partners
- **Board consultation process**
  - Consultation process with the boards of the CBF and CBAA

About this report

This Discovery Insights Report marks the beginning of *Roadmap 2033*, not the end. It captures the insights of 22 thought leaders and opinion makers and 84 station and sector representative organisation representatives. We asked these people to talk about current challenges and share their aspirations for the future. Their views are summarised here to spark discussion, not to end it.

This is a research report. We have included extensive verbatim quotations so that you can hear how people speak about the community broadcasting sector. We take people at their word, and we report exactly what is said, including errors of perception or knowledge but we did work with the sponsoring organisations to catch any serious factual errors.

The preliminary results of this phase of *Roadmap 2033* were reported to people participating in two leadership forums held in February and March 2023.

Qualitative research methodology and sample

- 22 one-on-one semi-structured interviews were conducted with thought leaders and opinion makers inside and outside of the community broadcasting sector:
    - Each interview lasted between 60 and 75 minutes
    - Interviews were moderated using a non-directive technique, drawing upon a discussion guide that was tailored according to each individual's area of expertise and experience
- 10 focus groups of up to 8 participants (a total of 62 participants) with sector participants were held:
    - Each focus group lasted 90 minutes
    - Groups were organised to cover all community interests and practice, including:
        - Audience builders
        - Broadcast technologists
        - Broadcast trainers
        - Broadcasting by or for people with disability
        - Community builders
        - Ethnic and multicultural broadcasters
        - Faith-based broadcasters
        - First Nations broadcasters
        - Regional and sub-metro broadcasters
        - Television broadcasters.
- In total, 42.5 hours of qualitative interviewing was spent with 84 individuals
- All fieldwork was conducted online between 18 January and 9 February 2023.

Environmental scan and trend rating process

The trends identified in this report were gleaned from a range of internal and external documents and briefings. A full list of references is included at the end of this report.

Thirty trends were organised as a MESTLE. A MESTLE analysis is a variation on an evidence-based tool used in strategic planning called a PESTLE. PESTLE stands for Political, Economic, Social, Technological, Legal and Environmental factors. It allows an organisation to form an impression of the factors that might impact a new business or industry.[1] The PESTLE was adapted to capture the issues surrounding the entire community broadcasting sector. The P for Political was replaced with an M for Media since the community broadcasting sector is heavily impacted by factors in the broader media environment.[2]

The list was refined using the MECE Principle, a grouping principle for separating a set of items into sub-sets that are mutually exclusive (ME) and collectively exhaustive (CE).[3] It is used here to minimise duplication (ME) between the items and to maximise comprehensiveness of the list as a whole (CE). The factors were expressed as trends indicating a potential shift over the next ten years as issues evolve and ripen.

Participants in the two leadership forums were asked to rate the factors. They were provided the MESTLE as pre-reading, including a discussion of their current disruptive impact (importance) and potential disruptive impact (significance). First, they were polled as individuals about the likelihood of the factors materialising over the next decade. Then, working in groups of increasing size, they used a deliberative process to rate the importance of the factors if they were to materialise. Each process produced a numeric score. The two ratings were used to create the scatter diagram on page 55, under 'Top Ten Trends'.

Report

The insights section of the report is written as a qualitative research study. The titles and sub-titles are findings in and of themselves. Verbatim quotations of research participants appear in *blue italics*.

This report is summarised as a Discussion Paper to socialise the findings and prompt discussion throughout the sector.

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[1] University of Sydney (2023) 'Marketing: PESTLE Analysis'. Library. Subject guides. Available at: https://libguides.library.usyd.edu.au/c.php?g=508107&p=5994242#:~:text=What%20is%20PESTLE%3F,a%20new%20business%20or%20industry. (Accessed: February 12, 2023).

[2] Politics (the 'P') has also been excluded because the sector is strictly non-partisan in its advocacy and will always seek a constructive working relationship with governments of the day. While the Commonwealth Department of Infrastructure, Transport, Regional Development, Communications and the Arts (DITRDCA) develops and implements federal government policy and the Australian Communications and Media Authority (ACMA) allocates spectrum and regulates media, other Commonwealth government departments and state governments can and do invest in community broadcasting to deliver public value. Over the next ten years, governments of various partisan affiliations will assume office at the federal and state levels in Australia.

[3] University of Sydney (2023) 'Marketing: PESTLE Analysis'. Library. Subject guides.

Some definitions

What is a public good?

In economics, a public good is a commodity or service that is provided without profit to all members of a society, either by the government or by a private individual or organisation. Users cannot be barred from accessing or using them for failing to pay for them. Also, use by one person neither prevents access of other people nor does it reduce availability to others.

What is public value?

Public value describes the value that an organisation or activity contributes to society. The term was originally coined by Harvard professor Mark H. Moore who saw it as the equivalent of shareholder value in the context of private sector organisations.

Public value refers to the value created by government through services, laws, regulation and other actions. It is produced by public managers (including through funding the provision of services) successfully navigating a strategic triangle encompassing the following (with examples drawn from the community broadcasting sector):

1. Producing valued outcomes (e.g., media diversity, social cohesion, trust in government and local news and information, including emergency communication before and after a natural disaster)

2. Within the constraints of available resources and capability (e.g., finite broadcasting spectrum)

3. In an authorising environment of formal and informal jurisdiction, legal frameworks, and mandate (e.g., *Broadcast Services Act 1992* and the Australian Communications and Media Authority (ACMA) Guidelines and the Community Radio Broadcasting Codes of Practice).

Introduction: A strengths-based process

We are always thinking that we need to get bigger and better. We are always looking at what is wrong and how do we fix it. Rather, let's look at what we are doing well and looking at how we can support this better. We are a successful sector. We can always do better. Stations bringing in more money or appealing to a bigger audience is not necessarily success. We are not out to compete. We have a different purpose.

Professor Heather Anderson
Griffith University

From the outset, *Roadmap 2033* was envisioned as a strengths-based process. As the project brief stated, 'There is an opportunity for the Roadmap to be a galvanising force that identifies, articulates and contextualises the sector's values and beliefs, and refines the sector's own narrative – how we talk about community broadcasting on air, to government and to ourselves, shifting the sector's story from one of scarcity to one of impact, and how we can maintain its relevance and build on its impact in the community in the future.'

What should the community broadcasting sector never let go of?

The *Roadmap 2033* process began by asking thought leaders, opinion makers and sector participants, 'What should the community broadcasting sector never let go of?' Their responses were wide-ranging and included:

- Independence
- Open access
- Diversity
- Serving marginalised communities
- Physical spaces
- Training for careers in media
- Authenticity
- Volunteer element
- Rebelliousness.

Don't stop being weird.

A place where we can go to figure things out.

The essence is in providing access to the media for people who are most marginalised. That means alternative content: music, news, and culture. Excluded people do community radio because they can't get a job at the ABC or SBS. Who is denied access? It's young new migrants. Access plays a role in the sector being a gateway to the rest of the media in terms of access and training.

The opportunity for sharing diverse perspectives. That element of diversity being our strength, needs to have a focus in the sector. You need to be aware of and working on all the time – to ensure that community media organisations are open and accessible.

Our lack of professional polish is the thing that sets us apart and our commitment to community content and stories.

Giving people a start as a presenter, journalist, musician. It's a pathway.

The name 'community broadcasting sector'

As the number of channels to distribute community content proliferates, there is a temptation to change the name of community broadcasting … to something else. 'Community media' was the most popular alternative. However, research participants made a compelling case for NOT changing the name … for now:

- Community television is experiencing a new lease on life.
- Consumer confusion could result from a name change.
- Policymakers are accustomed to supporting 'community broadcasting' and name changes in other areas of policy have not always been successful.
- 'Australian Community Media' is the name of a private company that owns small newspapers.
- The name of the sector may be irrelevant given most people identify with their station name, not the name of the sector.
- A sector name change could detract from the more important issues under consideration through the *Roadmap 2033* process.

When [the government] thinks about broadcasting, it thinks about television and newspapers as well. There would be a branding issue with Australian Community Media if you chose Community Media Sector. I think about the timing. The sector has been receiving attention from this government as the community broadcasting sector.

The trend is to find fancy new names, but you can create consumer confusion. If an FM station starts doing other things, radio will be the constant across all the platforms – live broadcast, podcast, online. Even if they have a newspaper, it will be the radio station's newspaper. A lot of businesses change names, and it creates consumer confusion. The name is your strongest asset. Talk about what radio is instead. Radio is very dynamic and diverse, and we should not apologise for it. Radio – own it!

What's in a name?

According to the people who participated in this study, it's important to parse the definition of community broadcasting to capture all the nuance within this seemingly simple concept.

Broadcasting	Radio & Television	Community Broadcasting	Under Australian Law
- **'One to many'** - **On-air** - **Online** - **Free to receive**	- 'Predominantly' or mostly broadcast 'live to air' (e.g., 70%) - 'Curated' – more by humans than by algorithms	- Predominantly not-for-profit with an open membership - Independent of commercial or political influence - Provides opportunities for people to participate - Local/hyperlocal - Content is reflective of and relevant to a 'community interest' - On-air broadcasting content drives distribution across other channels and platforms (including digital on-demand and print)	- Licensed to transmit content on AM, FM and DAB+ - Regulated as a public good (i.e., access to all) - Funded to deliver 'public value' - Volunteers and paid staff part of one 'workforce'

Top ten insights

1. Purpose and Identity

1. **Purpose and Identity**

Despite the transformative technological revolution that will transpire over the next decade, the essence of community broadcasting can survive and thrive if it is remains focused on its purpose – community.

The people who participated in this study put forward several ideas for how to articulate the purpose and identity of the sector in the future:

- **The purpose of community broadcasting has always been clear: to serve the 'community interest'**

  Since they first appeared on the airwaves, community broadcasters have focused on providing unique content to their 'community interest'. Radio Pacifica started in California in 1946 to give voice to the community of pacifists that emerged following the nuclear conclusion of World War Two. 'Pirate Radio' stations like Radio Caroline started in the UK in the 1960s to supply an underground market with alternative music that could not be broadcast legally over the airwaves at that time. In Australia, one of the first community type broadcasting licences was granted to 4ZZZ in Brisbane in 1974 so that it could offer an alternative assessment of the Bjelke-Petersen state government to the narrative transmitted by the traditional media establishment of the day.

  First Nations broadcasters have always held community close to the heart of their mission. The role of Remote Indigenous Broadcasting Services has been to communicate with remote communities, sometimes in language, to ensure the survival of some of the oldest continuing cultures and languages on Earth. They have understood the importance of broadcasting an alternative, affirming view of themselves and their communities to their self-image, well-being and development of their youth.

  > *I think the essence of community radio is community. At the birth of the sector, those stations were agitating for a different type of media, but now its essence is about connecting to community – a geographic community or a community interest. What they all have in common is that connection to community and about representing the community that they are licensed to serve.*

  > *If we strategically embrace a for-purpose mindset, that is our potential.*

There are people here broadcasting as a hobby and I'm here broadcasting for the survival of my people.

Brett Leavy

- **Research participants suggested changing how stations are classified from their 'community interest' to their 'community impact'**

Under the original policy settings for community broadcasting, the 'community interest' which the station served was determined by the type of licence that was granted. For example, universities would be granted 'educational licences' and multicultural organisations would be granted 'ethnic' licences. The government has since streamlined the number of licence types down to just three categories (Community Radio, Community Television and Temporary Community Radio). It still considers the 'community interest' to be served by a licence holder when approving and renewing licences. While most stations serve a 'general geographical area', the ACMA website lists 20 non-geographic 'community interests':

- Arts and music
- Community access
- Country music
- Educational
- Educational/specialised music
- Ethnic – general
- General geographic area with a focus on (local) sport
- Indigenous
- LGBTQIA+
- Mature age
- Music – fine music
- Music – progressive
- Organisations serving 50+ years
- Print handicapped
- Religious – Christian
- Religious – Islamic
- Senior citizens
- Torres Strait Islanders
- Youth.
- Youth and students

While ACMA's Community Broadcasting Guidelines set out broad parameters for licence holders to meet in terms of community participation in the operation of a licence, it does not actively encourage stations to articulate or measure how they intend to have an impact on their community of interest. If it were to do so, it could move beyond a demographic definition of 'community interest' and toward a clearer 'impact statement' of intent.

> *Articulate the necessity for demonstrating impact. People must step back from that to consider if they are valued and how they are valued and what that value is.*

> *Look at ways of measuring social impact. We should look at audiences, producers, and the community more broadly. For example, a Ukrainian show on a general station and the Ukrainian settlement organisation doesn't know it exists, then there is a gap. You must look beyond the people involved. Who would you expect to know about it? In Sydney, you would expect the Aboriginal Legal Service in Sydney to know about Radio Skid Row. We need to look at the connections to community.*

However, at present, the sector does not have the tools or capability to measure impact in a systematic and cost-effective way. If there is strong commitment to knowing and understanding communities through the *Roadmap 2033* process, a suite of tools and skills will need to be developed to enable this. The sector will need to recognise 'community engagement' as a professional skill in the same way it views technological or journalistic skills or programming ability.

- **Research participants flag that the relationship between the broadcaster and community has been inverted in recent years and that the trend toward 'listening more than telling' is likely to continue**

  Aside from talk-back radio, broadcasting was traditionally thought of as 'one to many'. The presenter would act as 'curator' and make music and programming selections based on their tastes and preferences. Reportedly, the opportunity to act as an arbiter of culture is what attracted many volunteers to on-air roles over the years.

  According to the people who participated in this study, the flow of information has been inverted in recent years. Increasingly, presenters are being asked to reflect their community's tastes and preferences through their music and programming choices, rather than their own. We heard that 'it's now about listening as much as telling' and that 'community' is defined not only by one's relationship with fellow broadcasters but also with the audience.

  > *There are lots of small-scale grassroots examples of community engagement that demonstrate the specific roles that community radio can play within a local community, which cannot be achieved through Internet radio or podcasting alone. It's about embracing the hyperlocal. It's about information and messages directed at people in a locality. It's about designing how the content will be received as much as how it is produced. It's about networking with other localities to amplify impact. And it's about publics more than audiences.*

- **Communities change and community broadcasting organisations need to constantly evolve in response**

  As several research participants noted, it is not possible to 'set and forget' the impact a station hopes to have on its community; it must be constantly revisited and updated.

  Look at [a station serving an inner-city neighbourhood]. It has a very distinct reason for being. The problem is not that it has drifted away from its purpose, but it has stopped thinking about it. The industry and audiences change so much, you must constantly reconsider why you are there.

  I think that ultimately it comes down to the station licence. Stations need to keep revisiting their licence application and keep front and centre who it is that they should be serving. They get into trouble when they lose that. It's not about sticking to those licence conditions but if you should revisit that periodically.

- **When 'community interest' is reframed in terms of the outcomes that can be delivered, the impact can be multiplied**

  - Research respondents suggested numerous outcomes which community broadcasting can deliver and measure, at the level of stations, sector representative organisations and nationally. However, these are not simply 'outcomes' to satisfy the criteria for government funding; they are outcomes that measure organisations that are committed to making an impact.

    - **First Nations representation and self-determination**
      - Greater understanding and appreciation of Australia's Indigenous peoples and heritage
      - More positive representation of First Nations peoples in the media, reducing racism and promoting a more affirming self-image for Australian Aboriginal and Torres Strait Islanders
      - Better informed and less polarised debate as Australia responds to the generous offer of voice, treaty and truth though the Uluru Statement from the Heart over the next decisive decade.

    - **Trust in media and government**
      - Increased media literacy
      - More informed and balanced debate on a range of public issues
      - Greater democratic engagement.

    - **Community well-being and resilience**
      - Stronger social infrastructure to help communities remain vibrant
      - Increased resilience through public health crises and climate-related natural disasters
      - Lower rates of loneliness and a greater sense of belonging, resulting in better mental health outcomes through increased community connections

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Roadmap 2033: Discovery Insights, April 2023

- A trusted source of local information to assist Australians to access critical services.

   o **Social cohesion**
- Successful settlement of new migrants in all parts of Australia
- Higher support for multiculturalism and more appreciation for ethno-cultural diversity
- Greater understanding between people of different backgrounds, perspectives and generations

   o **Equity, diversity and inclusion**
- More opportunities for people living with disability to participate fully in the community through employment and volunteerism
- Equal opportunities for people of all genders, races, sexual orientations and physical abilities to have their voices heard
- Respect for the expression of all religious beliefs, including no religious belief

   o **Arts and culture**
- Thriving local arts and music scenes that give artists and performers an opportunity to share their talents including by creating pathways to professional careers in music and other creative professions
- Greater understanding and appreciation for Australia's unique cultural assets and attributes
- Better understanding of Australian and place-based history

   o **Skills and capacity building**
- Higher level of digital capability across the community
- Enhanced team building and teamwork skills among sector participants
- Heightened creative skills among sector participants, volunteers and trainees.

- **From scarcity to abundance, the sector is ready to tell a different story about itself**

'Beware the stories you tell yourself about yourself for surely you shall live them.'

William Shakespeare
Julius Caesar

As a consultant's report found in 2021, the sector has been talking itself down and has been telling a story of want and scarcity for too long. The problem with that narrative is that ignores the tremendous success story of the community broadcasting sector. It is a story of abundance: abundance of talent, goodwill and enthusiasm for what community broadcasting is all about.

One research participant explained the tendency to downplay success as an Australian cultural trait:

It is a very Australian cultural thing to downplay your success and the impact you have. That plays into the narrative – we talk it down. There are all these things that make regional broadcasters heroes and leaders, but they would not think of themselves in that way. We have to find a thread that makes sense to everyone: for-purpose … 'media for good'.

However, there is a compelling counternarrative, as numerous participants pointed out:

- Australia's community broadcasting sector is the largest in the world.
    - It is composed of over 500 services, operated by 346 licence holders.
    - This includes 52 First Nations organisations operating 140 services.
    - The sector has a weekly audience of over 5 million.
- Australia's community broadcasting sector brings in revenues of $125 million per year, including a total of $41.6 million in government funding ($20.9 for community broadcasting and $20.7 million for Indigenous broadcasting).
- It employs approximately 830 employees, up 18% on FY19.
- It attracts 18,600 volunteers, with the average volunteer working 8 hours a week; this equates to 3,900 full-time workers.
- It is called 'a respected pillar of media' along with commercial and public broadcasting.

The people who participated in this study said that community broadcasters need to tell themselves a new 'shared story' about:

- 'Who our sector is and what we are doing'
- A 'Big Movement'
- A vibrant, diverse and multicultural sector
- A movement that is 'having a positive impact on people's lives and communities'
- A trusted source of local news and information, arts, and culture
- A 'cultural asset'
- A critical component of 'community infrastructure'
- Stations that provide 'places for communities to come together and debate ideas and dispel myths'
- A continuing tradition of Australian storytelling that dates back more than 65,000 years.

We have an opportunity to shift the dial on our future. We have that opportunity to progress positive conversations that move our country forward and that we are making positive change.

There has never been a sector-wide marketing and branding effort. Having a shared way of referring to who our sector is and doing that on air could be really powerful for audience building, cross-promotion and the expansiveness of our reach. It would help people feel that they are part of something really big, 'a movement'.

So, [it's about] having that broad overview about what we are trying to achieve as a sector. That awareness that in addition to presenting a show for two hours a week, you are also part of something big. That sense of the overall value of the sector that we set out in the principles of our Codes of Practice [is] special.

- **Several participants suggested that broadcasters become 'more united' and promote the sector and one another on air, possibly through a shared marketing campaign and cross-promotion of broadcasters with a similar community interest**

    A national campaign is doable, even for those who believe that the sector cannot afford the luxury of an advertising campaign, because the sector has access to the airwaves. The target of the campaign must be community broadcasters themselves. It doesn't cost anything to 'change the mindset' but it could have a transformative effect. One participant said 'it is already happening by stealth', by promoting the Community Radio Plus app since nearly all community radio stations are accessible on a single platform.

    > *To appeal to people, we would need to change the language of scarcity. Community radio has this habit of putting ourselves in a box and say we only do this or that. We don't promote ourselves as a sector that can change lives. Those [stories of scarcity] make people more likely to think of us as less than commercial radio. We need to say that this is an exciting thing, a positive thing and we are making change. Changing the way we talk about ourselves will change the way we are regarded by the community.*

2. Financial sustainability

2. Financial sustainability

In the face of collapsing media business models and the rise of misinformation and disinformation around the world, Australia has a community asset it can leverage to counter these global trends

When the first community radio licence was issued in 1972, the underlying business model was innovative for the time. The policy settings ensured that not-for-profit community radio stations could not compete with commercial radio for advertising revenue but would instead rely upon civic-minded local businesses to 'sponsor' a community radio station and be content with a discrete, less overtly commercial tag acknowledging their public-spiritedness. The policy framework also assumed that stations would benefit from a steady stream of free labour, willingly volunteered by community-minded citizens. A lot has changed in 50 years.

- **According to some sector observers and participants, the 'general geographic area' community interest is too general, and stations lack the capacity and capability to make the underlying business model a success in sub-metro and regional areas**

The problem with having a general geographic community interest is that it is too general, according to commentators with a background in marketing and sales. While a small-town station might be able to express its unique character on air, stations in larger regional centres or sub-metro areas might find it difficult to differentiate themselves from commercial and other community radio stations. Without a clear statement of the unique impact a station seeks to have, it is difficult to target potential sponsors with a compelling value proposition.

While many rural and remote small-town stations are 'too small to fail' because their costs are low, it is regional and sub-metro general licence holders which are increasingly at risk due to capacity and capability issues. First, there has been a growing recognition that it is no longer viable to run a community radio station on volunteer labour alone. At a minimum, stations need to employ a station manager or sponsorship salesperson so that they can stay on air. Second, the traditional sponsorship model is increasingly unable to compete with online advertising because online platforms pump out digital 'metrics' that validate their return on investment from advertising while community radio stations cannot access a comparable level of audience measurement to prove the worth of sponsorship. While stations might be able to stay on air

without paid staff, they will find it increasingly harder to remain relevant, grow their station and make an impact on their communities without at least some full-time staff.

> *In such small populations, there are not enough resources to do the things that they need to do, and they are falling further and further behind. The days of being able to operate a radio station alone (just a radio station) are over. We need to look to do more things together and changing the way that community radio is administered and executed on a local level. Let's say you have a population of 80,000 people: 2 per cent will support the station, so that is 1,600 people. You can't run a station like that. The basics that undergird the fundamentals of running a business are not there.*

If the Australian government wanted to build a community broadcasting sector today to counter the pervasive misinformation and disinformation online, it couldn't afford to. If other democratic countries around the world understood the value of Australia's community broadcasting sector, they would look to it with envy. The return on investment for the government is strong. One policymaker who participated in the Discovery Phase of this project asked, 'What is the value proposition you are offering to government? What is your unique contribution to public value creation?

> *It is a distinct part, but a part, of a diverse radio sector. So, what is its value proposition? There is a lot more that it can do.*

> *Are we funding to just keep the lights on or are we empowering people to deliver outcomes?*

Other people who participated in this study asked if there were not several ways in which the community broadcasting sector could deliver public value:

- Connecting more First Nations and remote communities to themselves and to non-Indigenous Australians?
- Enhancing community resilience against public health crises and before during and after climate-related natural disasters (e.g., drought, fire, flood)?
- Ensuring a healthy local and national democracy through trusted news reporting and public interest journalism at the local level?
- Facilitating successful migrant settlement in Regional Australia and better community cohesion across languages and cultures in capital cities?
- Subsidised training for employment and vital volunteer work, including for people with disabilities?

While more extensive analysis of the financial situation would need to be done to target support, the findings of this survey suggest that a blanket approach is not needed. There are many healthy community broadcasting organisations across the country. Data and research can be used to identify exactly where strategic investment is needed to shore up Australia's community broadcasting asset. Research participants mentioned opportunities for collaboration with the ABC in national emergency broadcasting coverage so that training and support can be deployed. Others suggested working with the National Emergency Management Agency to identify which disaster-prone areas require more communications support and a constant broadcasting presence. Still others pointed to the work of the Australian Newsroom Mapping Project and talked about how it could be used to chart the spread of

'media deserts' in Regional Australia to identify where more professional media delivery is required.

To understand the current state and future potential of financial sustainability for the community broadcasting sector, it is necessary to look at both revenues and expenses.

REVENUES

- **Research participants said that government policy and regulatory settings have constrained the number and size of revenue streams available to community broadcasters**

Historically, the community broadcasting sector has tapped into a small number of revenue streams (i.e., sponsorship, membership, fundraising and government grants). However, capacity and capability constraints have meant that it has been challenging for some stations to be financially sustainable. This has led to a situation where in 2022 the CBAA classified 7% of stations at 'high risk' and a further 11% as 'vulnerable'.

- **Nonetheless, several research participants offered ideas for how to maximise revenue at the sector, sector representative organisation and station levels.**

  o **Test new business models**

Several research participants suggested that community broadcasters 'thicken' their value propositions by testing new business models that are 'more than radio', including social enterprises. People cited the experience of some stations that have successfully operated community centres to complement their community-led mission. Others suggested that the sector might experiment with creating regional training hubs in the future.

The business model needs to move towards a social enterprise model that allows the station to have arms that reach beyond sponsorship for revenue. For example, providing more community services.

  o **Reform and strengthen the sponsorship model**

At present, community radio stations can accept up to five minutes of sponsorship announcements per hour and community television stations can accept up to seven minutes. Some research participants said that consideration should be given to an increase in the number of minutes permitted on both platforms. Others previously suggested that data modelling needs to be undertaken to demonstrate the return on investment in community radio sponsorship and whether a change would be beneficial. Such a review would need to consider the recent changes to privacy legislation, including the loss of 'cookies', which produce large volumes of sometimes questionable data.

It costs the average business much less to invest in Facebook ads and they can tailor their reach and target their preferred audience and customers.

- o **Modernise the membership model**

The regulator recommends having an 'open membership' but there are multiple successful membership models in operation. Historically, membership fees helped to support the operation of stations but membership fees as a source of revenue have been declining in recent years. Some stations have replaced 'memberships' with 'subscriptions' while others may have had difficulty in servicing large memberships.

Some research participants suggested that stations consider how they can offer additional benefits, like premium content, to make the membership value proposition more appealing and compelling. Alternatively, some others said that the purpose of membership in community broadcasting stations should be reconsidered altogether. If a station is having difficulty maintaining a membership program, it could follow the lead of other stations who have reduced the role of membership to governance only.

> *If curated content is your point of difference, how do you lean into that and monetise premium content for members.*

- o **Develop more capacity and capability to pursue fundraising and philanthropic funding**

Research participants said that while the sector needs to raise more revenue from fundraising and philanthropy, it lacks the skills to do so. There is also the question of fundraising capability; it is a sophisticated process and can be costly. It is best undertaken on a national or sub-sector level to take advantage of efficiencies. To further develop capability at the station level, coaching might be a better approach than training since successive groups of volunteers need to be 'walked through' the process of cultivating and nurturing donors and philanthropists.

> *Sponsorship is declining/stagnating and fundraising is increasing. Many of our stations lack the skills in fundraising. You can't fundraise if you don't have an effective database.*

- o **The most frequently mentioned suggestion was for the community broadcasting sector to grow and diversify its government funding by seeking support from more federal government departments, state governments and local governments**

- o **Federal government** – Participants made the point that the value of community broadcasting to the federal government is not limited to the Department of Infrastructure, Transport, Regional Development, Communications and the Arts. They observed that the Department of Social Services has already funded RPH Australia (the radio reading network) to create a pan-disability broadcasting service to build upon 'radio for the print handicapped' and CBAA have received funding for many years from the Department of Health. Others suggested that the Department of Home Affairs might see value in investing in multilingual

broadcasting in regional areas with large concentrations of new migrants. Still others suggested that community radio could be an extension of 'Australian soft power' if they were able to broadcast terrestrially in the Asia-Pacific region.

We should focus our advocacy beyond the Minister of Communications. There would be resources to be had in terms of community resilience and emergency response, infrastructure funding and data and measurements and in First Nations media (led by FNMA [the First Nations Media Association). FNMA has a strong relationship with the Department of Indigenous Affairs. I don't see conversations with Health and Community Services, and we might be missing out.

We need a more expansive vision of what community can do. We should talk to DFAT [Department of Foreign Affairs and Trade] about its soft power and foreign diplomacy and the role of media. There is a role for us to have more connections there and to tap into another source of funding. There has been very little conversation between [DITRDCA] and multicultural affairs.

o **State governments** – During the Covid-19 pandemic, the National Ethnic and Multicultural Broadcasters' Council (NEMBC) created the National Multilingual News service to make health-related messages available to non-English speaking populations across the country. This is a capability which governments should retain in case of future public health, natural disaster or national security crises.

A lot of the Covid funding for our news service comes from the Victorian and the NSW governments. That's why we formed NEMBC Media. Since Covid, we have got a lot of visibility. We normally run 3 or 4 projects a year, but this year we are running 25 projects.

o **Local governments** – While the ability of local governments to financially support community broadcasting services varies according to the taxing power of local government authorities, research participants said that community broadcasters should continue to build relationships with local government to seek financial support for facilities and transmission where possible to reduce the reliance on federal government funding.

▪ **In the absence of other market-based solutions, the government may find that it is necessary to consider parts of the community broadcasting sector 'essential services' if it wants to retain resilient communities in parts of Australia**

It has been suggested that it may be necessary to fund an employment model for community radio in parts of the country that are at serious risk of climate-related natural disasters and where 'media deserts' are likely to spread. They suggest a case-by-case process to evaluate the strategic assets that the government needs to preserve. However, they advise that community broadcasting needs to fiercely guard its independence and not become another arm of public broadcasting.

If it is not viable, it becomes a public good and relies upon the taxpayer. It's a huge difference if people are paid, like in the Indigenous sector, even if it is only part payment. Those questions are very important.

Always happy to see more funding so long as it doesn't come with strings attached. We need to keep that independence of government. We should not be another arm of the ABC or SBS.

EXPENSES

▪ **While community radio stations are adept at stretching resources to meet demand, several research participants said that there is a lot of duplication and that more can be done to collaborate and take advantage of economies of scale**

Greater collaboration could offer several cost savings and other benefits. For example, if multiple stations were to come together to form a jointly owned 'services company' or 'technical hub' they could decrease the cost and increase the quality of several support services such as technical support and back-office administration. There are several examples of this already happening, for example, the Christian Media Hub with stations in Wollongong, Bathurst, Orange, Dubbo and Albury-Wodonga, the co-mission arrangement between Hope Media, 96.5 in Brisbane and stations on the Gold and Sunshine Coasts. There is also evidence of considerable savings through CBAA's Digital Radio Project managing the infrastructure for the DAB+ digital radio standard for over 60 services.

Such a move would be consistent with the findings of the National Volunteering Strategy which found that it is better to professionalise those services which are not critical to the mission of a not-for-profit organisation, allowing volunteers to focus on those things that they do best (i.e., reflecting the community they serve and represent). People familiar with not-for-profit management said that an additional benefit of paying professionals like bookkeepers would be to reduce errors and to increase the trust of government and other funders.

▪ **There are opportunities to collaborate at all levels including between sectors, sector-wide, between sector representative organisations and regionally:**

   o **Between sectors –** According to representatives of the commercial radio sector, there are opportunities to jointly advocate to 'protect radio' and access to radio frequency and transmission facilities. The CBAA's Digital Radio Project is a good example of a longstanding collaboration between community and commercial radio.

   o **Sector-wide –** As community television comes back to life in capital cities across the country, there is an opportunity for community radio and television stations to share facilities and distribution platforms. The 'Spots and Space' community media agency could be grown strategically beyond its current focus on the First Nations and Print Disability parts of the sector.

   o **Sector representative organisations –** Sector representative organisations can do more on behalf of their members. They are able to syndicate content as NEMBC does

with its Multilingual News Service. Or they could offer more group training as Christian Media Arts does in fundraising training with its members.

- o **Regionally** – Several research participants talked about shared 'tech hubs' where content makers could share podcasting facilities or 'green screens', eliminating the need for facilities in each individual station. They also envisioned shared technicians, bookkeepers and other administrative staff.

From a tech point of view, I would like to see a business coordinating the techs in the sector. There is a range of people with excellent technical skills. There is an opportunity to provide work for that group of people. SACBA [South Australian Community Broadcasters Association] provides tech support, there are pockets in Melbourne and Sydney. It would remove barriers to recruiting and training techs. There is a business in coordinating that group of people.

We would amalgamate a lot of the small stations so we could serve them all. All the back-office functions would be part of it. All these stations have their own managers, bookkeepers, so they are all struggling. If you can put all that money back into a central pool. That is a lot of cost savings.

- ▪ **To achieve these efficiencies, the sector will need to clearly address the likely attitudinal and cultural barriers**

The strong local character and grassroots nature of the community broadcasting sector makes some long-time broadcasters distrustful of larger organisational structures. At the same time, there are some well-known cultural barriers that stand in the way of cooperation between some Indigenous broadcasting groups. The sector will need to navigate these sensitivities to deliver common benefits to the collective.

There are tensions that arise around a coordinated activity … when stations compare the costs of a centralised service to their individual needs. They compare one grant of $500,000 to fifty grants of $10,000 and ask which is a more effective way of funding. That is because of the grassroots nature of our sector. People don't like one size fits all but there is an efficiency in centralising services.

We need to consider that our [First Nations] communities are very different. We have different languages and dialects and cultural barriers. We need to put an Indigenous lens on this to ensure our communities can work as best they can. Streamlining ideas is important, but it would need to have more consideration about what that means about some of our more remote communities.

3. Audience and distribution

3. Audience and distribution

To thrive in the coming decade, community broadcasters will need to focus more on 'community' than 'broadcasting'

AUDIENCE

Insight #1 chronicled how the relationship between 'broadcaster' and listener has been 'inverted' over recent years and that presenters now must reflect the tastes and preferences of their communities, rather than their own. Many research participants said that, consequently, the sector must get much better at measuring and listening to its audience.

> *The focus on audience is lacking in the sector, except for the Christians. The rest of the sector focuses on who is behind the microphone. We need a much better understanding of data on what those people want and need, rather than the presenter choosing. We want to maximise listenership, but we don't want to compete with commercial [radio]. So, you must know your audience.*

Until now, cost has been cited as one of the barriers to granular audience measurement. Community radio stations cannot afford the Nielsen/GfK ratings used to measure the reach and frequency of commercial radio content. Many cannot afford or have too small a listener base for the CBAA's Community Radio Listener Survey . However, the bigger barrier to understanding audiences may be the absence of measures that capture the impact a station wants to have. Without a well-developed theory of change, it is impossible to gauge how a station is impacting its community.

- **Some parts of the sector already have a well-developed 'theory of change' about how their content and activities will impact their communities and have aligned data collection and research to it to measure outcomes delivered for communities**

What is most important is the alignment between the desired impact and the measurement method. There are alternatives to costly quantitative audience measurement surveys. Some impacts can only be evaluated using qualitative research or case studies. For example, Christian Media Arts Australia has done a study called *The Social Return on Christian Media in Australia.* Several academics have done smaller-scale, self-funded studies on everything ranging from how the experience of asylum seekers was improved through community radio to how community broadcasting can be important social support for women leaving prison.

> *There is so much pressure to 'get the numbers up' but when I do that, I lose sight of the impact that community media is having on just one life and how that might impact the sector/community. I'm not going to hear about the difference a program made in someone's life*

through numbers. Data is important but what is missing is the qualitative research and the ability to tell those stories, not through a marketing framework but through an impact framework.

▪ **Research participants report that community broadcasters have been needlessly caught up in a circular debate over whether size or quality of audience matters most**

Reportedly, worldview determines which side of the argument a broadcaster is on. Some people say that the 'size of audience does matter' because if no one is drawn to listen to the content, a program or station is not having its intended impact on the community; it is not serving its 'purpose'. Others say that it is 'quality, not quantity' that matters because the job of community broadcasting is to target marginalised people and to amplify voices that are not already heard. However, the content must be appealing to attract the audience to serve the station's community interest and the community interest must be broad enough to justify the allocation of spectrum. So, it is a circular argument. It is not possible to have one without the other.

It is the content that matters. People will find the content that they want. However, if the content is not there, there is nothing to discover.

It is a qualitative thing, not a quantitative thing. Community radio can increase its reach, but it doesn't matter about the size so long as you are reaching the audience that wants your content. The audience will connect because the service reflects a local culture or community interest. Some already do that well and others don't.

New wearable technology that automatically tracks the source and content that audiences listen to may become available in the next decade. It could provide vital information and insights for stations to be used as an independent source of information regarding the sector, in terms of listenership.

▪ **If the focus of stations is on their communities, it might be necessary to look beyond the immediate audience of listeners and look outward to understand the connections between a station's audience and the broader community**

The community broadcasting sector does not have to carry the entire burden of measurement on its own. Depending on the outcomes that are being pursued, there may be free third-party surveys and external studies that can help. For example, the annual 'Closing the Gap' report to Parliament or periodic reports from the Lowitja Institute can serve as a measure of progress toward goals and targets for First Nations peoples. The Scanlon Foundation produces an annual report that can be used to track the success of settlement programs for migrants and refugees. Not-for-profit health insurer, Australian Unity, publishes the annual Australian Well-Being Index that measures community well-being. All these reports can be used by stations, sector representative organisations and the sector itself as external reference points against which to measure progress. However, care will need to be taken to isolate the impacts generated by community broadcasters and other organisations with similar missions (such as the ABC and SBS).

DISTRIBUTION

- **Research participant after research participant said that it doesn't matter what technology you use to broadcast, it's the technology the listener uses to receive it that matters**

Australians are faced with an increasing array of devices and channels upon which they can receive and listen to content. Community broadcasters need to capture the attention of the audience wherever they are. This has led to simultaneously distributing content on multiple platforms with the associated cost and complication that brings.

> *Technology [that] the listener uses trumps broadcast technology every time.*

> *The distribution model is irrelevant, the content is paramount. The way we distribute needs to respond to anywhere the audience is. I could second guess that for five years but not for ten. We need to be responsive and not lock ourselves into any distribution model.*

The people who participated in this study said that the audience must be able to find community broadcasting content:

- **Everywhere**
    - Analogue AM and FM bands
    - Digital radio (DAB+)
    - The Community Radio Plus app, including on Apple CarPlay and Android Auto and Smart Speakers
    - Spotify
    - Station websites and their own apps
    - Social media platforms, including:
        - Facebook
        - Instagram
        - TikTok.

> *Content is content. The value and values of community broadcasting should not be specific to a particular platform.*

> *Community broadcasting is more than 'radio'. We include streaming and podcasting.*

> *Community media needs to be where other media are.*

> *I am platform agnostic.*

> *You need to be agile to keep following the listeners.*

- However, to be available 'everywhere' the digital divide between urban and regional Australians and between remote First Nations communities and non-indigenous communities will need to be narrowed and closed.

- **And, to access it through a single point of contact**
    - Smart speakers in home or in car – alongside all other digital content
    - Enabled by geolocation technology so it can dynamically suggest 'community broadcasting stations near you'
    - Including audio, visual and print content through the same channel or device.

Hopefully, we will have a single point of access for audio and visual content.

The speaker itself is just hardware but it is the assistant that does the listening. Google and [Amazon] Alexa are run by big platforms. So, it is an opportunity to further distribute content. In five years' time, they will be in the car, on personable wearables and on phones, IOT (i.e., Internet of Things) wall clocks and photo frames. So, the upside is that anything could be a radio. The challenge is that these tech platforms are very controlling.

Television is just another way of telling a story. There will always be separation between a visual and audio storytelling mode. Visual is being produced with audio in mind and there are podcasters that are looking at visual content as well. They will always be separate in the way they are produced but they can be disseminated through both mediums.

4. First Nations representation and participation

4. First Nations representation and participation

To 'close the gap' between the expectations and outcomes of indigenous and non-indigenous Australians, First Nations media needs to flourish within both Aboriginal and Torres Strait Islander communities and non-indigenous communities

There are two main agreements which underpin the policy settings of First Nations Media in Australia: one international and one national.

The UN Declaration on the Rights of Indigenous Peoples	CLOSING THE GAP
Article 16 of the UN Declaration on the Rights of Indigenous Peoples: 'Indigenous peoples have the right to establish their own media in their own languages and to have access to all forms of non-indigenous media without discrimination'	**Outcome 17 of the National Agreement on 'Closing the Gap':** 'Aboriginal and Torres Strait Islander people have access to information and services enabling participation in informed decision-making regarding their own lives.'

However, in speaking to people from across the sector, First Nations self-determination is not a question of policy or law, it is a question of natural justice. It is a question of redressing injustice, not just in the past but in the present.

It is critically important that First Nations people are represented accurately and positively in the media as non-Indigenous Australians respond to the generous offer of voice, treaty and truth, extended through the Uluru Statement from the Heart. It will also be important that First Nations peoples hear from one another through this process because they are not all decided, and they too will be voting in this year's referendum.

The importance of providing the correct information expressed in appropriate language and cultural terms was demonstrated during the Covid-19 pandemic. Unfortunately, it is not as simple as translating messages developed by English-speaking advertising agencies in capital

cities into Indigenous languages. These messages require the localisation and contextualisation that can only be added by First Nations broadcasters.

There is a lot we can be doing in terms of closing the gap.

Creating content for the Australian community from an Indigenous point of view is very important. Giving and receiving information so that our communities can stay informed is very important to health and other emergencies. We have such a big role to play in communicating with our people in regional and remote areas. To do that culturally appropriately and sustainably needs funding.

If you use cut and paste messages from ad agencies, people won't understand it. It's not about just translating it. How they are spoken and understood is very complex. There are many different layers. In the Northern Territory, all they could understand was that Covid came from Asia and so people didn't go to the Chinese restaurant or go near Asians; that was their comprehension of Covid. Ultimately, Indigenous Media plays such a role in this. What funding is there for the long-term? For pandemics? For natural disasters?

It is important to understand that the purpose of participation in First Nations media is different than elsewhere in the sector. First Nations stations are funded to provide training and employment opportunities for Aboriginal and Torres Strait Islanders. Unfortunately, many of the employed managers are not Indigenous and Indigenous workers are not paid at market rate, further entrenching inequality and disadvantage, but it is nonetheless important that they are funded and seen to provide an essential service. They are preserving a community asset and a cultural asset.

Aboriginal stations provide things that community radio cannot. We cannot expect people to volunteer because they might be on the dole. We think that Aboriginal radio should provide jobs, but 90 per cent of the managers are not indigenous.

Community broadcasting plays a critical role in language instruction and preservation, including archiving recordings of language speakers. Language is critical to retaining and growing Aboriginal culture, the oldest continuing civilisation on Earth.

Prior to colonisation, there were 800 languages/dialects but now there are 250. As a peak [body], we acknowledge we want to make sure that those who have never left their communities can understand their local language.

I know that one Inuit station [in Canada] lost their language. There were only two speakers left [until they started to broadcast in the language]. It works if there is only one language group in town.

While Indigenous Broadcasting Services represent nearly one third of community broadcasting services (i.e., 140 out of 500), communities are still suffering from a lack of information, including information about the proposed Voice to Parliament, which will directly affect them, according to some of the Indigenous people who participated in this study. This finding underscores the importance of using journalism to explain the issues facing our First Nations people.

Aboriginal people are still asking, 'What does the Voice mean?' Even though it directly affects Indigenous people. How do we take a voice to Parliament when we don't have a voice with Indigenous people.'

First Nations Media Australia issued nine Calls for Action in 2018. The people who participated in this study identified additional needs for funding and support: first, the need to upgrade and repair broadcast technology in remote communities; and second, training needed to equip local Indigenous people to repair critical communications infrastructure, rather than relying (and waiting for) fly-in, fly-out technicians to arrive. Aboriginal people want to be trained not only to repair broadcast technology, but to maintain digital reception equipment, such as satellite dishes to reduce downtime when Internet interruptions inevitably occur.

Some say that with better funding (and control over their own licences), First Nations broadcasters could fill some of the 'black holes' in communities which do not currently receive any signal at all.

> *We'd like to be like the ABC. We want to be able to put licences into black spot areas. We don't have licences in Adelaide or Hobart. The only way we can do that is if we are our own autonomous body. We need a body that governs all of this.*

The First Nations people who were interviewed and who participated in the focus groups (in addition to the group dedicated to First Nations Broadcasting, Indigenous broadcasters self-identified in other group discussions), expressed a range of views on one issue on which the First Nations Sector has yet to come to a consensus. That is the question of a separate licence for Indigenous broadcasters. Proponents say that Article 16 of the UN Declaration on the Rights of Indigenous Peoples gives First Nations Australians the right to establish their own media in their own languages. Opponents say that Australian First Nations people are well-served by the current arrangements and they are not confident the First Nations Media Sector has the capacity to administer a separate regime at the present time. The First Nations Media Association says that 'more conversations are needed'.

> *There is a division in terms of a separate licence. Some are for and some are against. At FNMA, our position is to keep having these conversations. We want to see what the majority want. We are not in a position to advocate for or against. At our last gathering, there were some surface-level conversations. There needs to be more intimate conversations about what these means for all [Indigenous Broadcasting Services] broadcasters. It is important to let everyone know that the intent is to support it if that is what people want.*

The non-Indigenous people who participated in this study expressed overwhelming goodwill toward First Nations Australians and a willingness to support them on their road to self-determination in whatever way they could. However, they were equally reluctant to impose their views or impose assistance on First Nations colleagues unless requested to do so.

5. Community Resilience

5. Community Resilience

To withstand the devastation of public health crises and climate-related natural disasters, community broadcasting should be considered a critical component of community infrastructure

Australians have been uniquely successful at securing a sparsely populated, continent-sized country characterised by a harsh environment and weather extremes over millennia. We have done so through a combination of traditional knowledge, social networks and physical infrastructure. At its best, community broadcasting draws upon all three in times of emergency.

Community broadcasting is a critical component of what research participants called 'community infrastructure'. They said that the ability to hold ground and keep a community together through health crises and bushfires is as critical to survival in Australia as a bridge is to a safe escape from a flood, or a water tower is to surviving a drought.

When the world is coming to an end, it is important to hear exactly what is happening in your corner of it.

Community connectedness is important. For people who have reduced personal circumstances, national coverage is not enough. This is highly localised information. They want to know what that means for them and their town. All news is local in the end. Just like all politics is local.

We talk about community resilience. How do we build resilient infrastructure? A lot of that is communications infrastructure. Community radio is one of those things that get mentioned. The National Emergency Management Agency is still getting their minds around it. It needs to be part of the planning for community resilience.

According to the people who participated in this study, there was broad agreement that community radio is uniquely placed to intensively work with the community before, during and after the onset of a natural disaster: radios are highly mobile; they work when the Internet won't; they are usually powered by an independent source of energy, like a built-in battery or a car; and they provide 'real-time information in easily digestible bites'. Critically, the primary audience for emergency broadcasts are emergency services personnel themselves.

In the most recent bushfires (southeast Australia) and floods (northwest Australia), the problem was loss of power and loss of mobile reception. Social media uses an algorithm and was unreliable because they post the most-read post, not the most recent. We are working with CBAA on DAB+. There are three ways of listening to radio, and community broadcasting stations need to be in all three: analogue, DAB and digital. There is more work for broadcasters.

The government has a much bigger issue with infrastructure. It has been neglected for a decade. We have an ageing network that cost community stations too much to run and rapidly shrinking access in terms of FM with no real effort put into replacement for FM. If audiences can't receive the content

in times of crisis, you might as well not make the content at all. You can't rely on the Internet or on systems that need reliable electricity. The Internet infrastructure needs to be reformed quickly for the sake of emergency services.

Community radio can deliver outcomes before, during and after a natural disaster under the Prevention, Preparedness, Response & Recover (PPRR) Emergency Management Model

Disaster Phase	Prepare/Mitigate	Prepare	Respond	Recover
Community Broadcast Response	Access traditional knowledge of First Nations elders (e.g., Gundagai Flood of 1852) Provide advice and establish communication links and networks	Support decision-making about triggering fire/flood plans and/or evacuation	ABC Emergency Services – Direct or re-transmit reportage on disaster in progress Or, Designated and trained community broadcasters	Disaster-affected people provided information on how to access relief services And, Hold authorities to account through open dialogue and debate
Community Outcomes	Community resilience	Mental health – manage anxiety/reduce isolation	Physical safety/prevent loss of life and property	Community resilience/ democratic accountability/trust in government

The table above summarises how research respondents view the community broadcasting response and resultant outcomes under the PPRR model commonly used in Emergency Management.

While there was unanimous agreement that community radio is uniquely well-suited to working with communities before and after natural disasters, there was less agreement on its role during the emergency event itself. Some research participants asked, 'Just because they can, should they?' Some said emergency broadcasting is the job of the ABC alone. Others said it depends on whether community broadcasters are trained and/or accredited to perform this role. Still others said that it is up to stations to decide if they want to be trained and perform this role (i.e., it may not suit the station's volunteer cohort or may not be compatible with its format).

They can do the resilience piece and they should do the front-end piece because they are better able to do that. They have hyperlocal reach and input. They are better than the ABC.

It is clear that ABC is the most resourced to do acute emergency coverage. The commercial [stations] wanted to do that, but the government said that the ABC is the emergency broadcaster. The commercials are networked at night. Community radio is unreliable. Everyone at the station is impacted by the emergency. For volunteers, you can bet where they are going to go. Only when you know that your family and house is safe can you [stay at your volunteer post].

Debate aside, many community radio stations can and do provide 'emergency broadcasting services' in the acute phase of natural disasters. Indeed, community broadcasters already provide emergency broadcasting services for 96 communities which have no other media/iIndigenous media outlet and an additional 18 communities that 'switch over' to ABC emergency broadcasts during natural disasters.

The question for community broadcasters who commit to remain in place during the acute phase of a natural disaster is threefold:

I. **Do they have adequate physical infrastructure to operate reliably and safely during a natural disaster?**

Some said that there is a big issue with ageing or poorly maintained infrastructure and that back-up systems are needed for community radio stations to remain on air during natural disasters, like bushfires.

Some stations own their infrastructure while others have management arrangements with BAI Communications (formally Broadcast Australia) or other shared communications infrastructure providers, leaving open the question of who is to maintain it for emergency purposes and at what standard.

The Foundation for Rural & Regional Renewal has recognised this need and is providing funding 'to equip communities to withstand disruptions and act upon opportunities'.

II. **Are they compensated to remain in place while their homes may be caught up in the natural disaster?**

When disasters were a 'one in one hundred years' event, it wasn't necessary to consider payment. With the frequency and intensity of fires and floods set to increase in coming decades, it will be an important question for government to consider. It will be part of the same decision-making process about whether to pay volunteers from the Rural Fire Services and State Emergency Services.

III. **Is the mental health of staff and volunteers supported after the event?**

Some research participants said that community radio volunteers who broadcast during the Black Summer Bushfires (reportedly 80 stations) did not receive the same mental health care support after the event as emergency services staff who served in the same fires.

Some suggested that AI-enabled artificial voices may be able to take the place of human announcers in the future. It is yet to be seen if trust in community broadcasters can be transferred to a chatbot. Experts advise that the two most important actions during an emergency may be out of reach of a robot:

- Building relationships with emergency personnel (e.g., fire, police, hospital managers) before the onset of an event
- Mediating conflicting messages from different authorities (e.g., fire, police, the Bureau of Meteorology).

Stations in the US are now experimenting with artificial voices. If there is an emergency, there may not be people to do the broadcast. Those kinds of tools will be important in creating local and timely content.

The Covid-19 pandemic set many precedents. One was the critical involvement of non-English language media in communicating critical health messages to communities throughout the country. This is an area of particular interest to State governments.

Several respondents said that the community broadcasting sector should collaborate with the ABC and government to develop a place-based approach to emergency broadcast planning, so that local needs and conditions are assessed before any blanket regulations are applied.

6. News and local media

6. News and local media

As commercial broadcasters retreat from regional areas, regional Australians are looking for trusted voices to fill the gaps that are left in local information and news

With geopolitical conflict and climate change–induced disasters swirling about the globe, the trend is to look inward to our own patch. At the same time, global social media platforms have been shown to provide fertile territory to sow doubt and disinformation.

- **'Localism' and 'hyperlocalism' have appeared as balms against the conflict and disinformation in the broader world and local media has emerged as a rare source of trusted information**

  While we might turn inward to avoid global disasters, conflicts and disinformation, we are also attracted by the local, the familiar, the neighbourhood. Local news and information have their own inherent attraction. They can reduce loneliness, but it's more than that. Local broadcasting can increase a feeling of 'connectedness' that only small local communities can provide. For people living in sparsely populated areas, a local broadcasting presence can impart a sense of security, stability and continuity. It's part of the community infrastructure that supports vibrant and fulfilling lives.

  > *When the world is coming to an end, it is important to hear exactly what is happening in your corner of it.*

  > *Community connectedness is important. For people who have reduced personal circumstances, national coverage is not enough. This is highly localised information. They want to know what that means for them and their town. All news is local in the end. Just like all politics is local.*

  Community broadcasting provides a crucial service and community connection for underserved audiences, particularly in regional areas. Diverse voices are not always heard in regional Australia because the mainstream media under-represent the diversity of Australia's regional areas. The opportunity for community broadcasting to truly represent an accurate diversity of regional Australia is only growing as more migrants are incentivised to settle outside of capital cities.

  Issues might be global, but they are manifesting locally. In the United States, a consortium of groups recently released the 'Roadmap for Local News' because the need for trusted news and information in rural America is so great. In Australia, the retreat of commercial television, consolidation and increased networking of commercial radio, and the demise of small-town newspapers is creating large tracts of 'media deserts' across regional Australia. Organisations including the Foundation for Rural & Regional Renewal have recognised this

concerning trend and are 'responding to a lack of local information by providing grants to organisations that pursue a charitable need or outcome such as community cohesion'.

> *Television news services have wound down their local content and a whole bunch of regional newspapers have disappeared. There are things that can be replaced from out of town, but it is harder to replace local journalists. It broadens the scope for all remaining media, including community media.*

Community radio stations have stood out in this environment as the last trusted signposts in these information deserts. Unfortunately, they are often unfunded and ill-equipped to fill the gaps left by commercial news publishers. Those same experts say that the community sector is 'not entirely' and 'not yet' ready to fulfil the unglamourous job of daily news gathering and carry the weighty responsibility of 'public-interest journalism' in the bush.

- **Experts said that community radio has a role to play as 'the town square'**

According to experts, radio is well-suited to deliver local and hyperlocal news because: radio can be produced more cheaply than television; it's agile and scalable; it's faster to produce; and it is easily complemented by streaming of global and national content.

> *People flock to the thing that is popular. At the same time, there is re-engagement with your local village. It will be the village.*

> *It is possible for the community sector to play a role it is not yet ready to do so. It is not ready at present. It's most likely to make an impact in the local area – to do with its footprint and the people who are doing the work. Some larger stations may weigh in on national issues.*

Several research participants said that local news on its own was necessary but not sufficient to meet the information needs of regional Australians. They said that to maintain listeners, it is necessary to supplement local news with national and regional bulletins, such as CBAA's National Radio News and the National Indigenous Radio Service's News because 'listeners are citizens of the world'. CBAA is also facilitating and developing collaboration between news-producing stations and other contributors to create a national network. This is an essential part of a complete and relevant news service. Additionally, it provides a platform for localised angles on issues at a federal level and offers a successful pathway to journalism for aspiring journalists.

> *Radio's strength in the future will be relevant local content, either geographically local or content that is relevant to a community. Streaming music and podcasting will provide global or national content, but the strength of radio will be locally relevant and timely content. For example, the discussion around Australia Day, what is happening with the Voice and politics.*

- **Unlike social media posts, principles of journalism overlay content produced by community radio stations**

Information appears on Facebook from groups, individuals and organisations. It might be 'hyperlocal' but it is not fact checked nor meets appropriate editorial standards.

I can find out local things on Facebook but that's not journalism. So, it is also about the principles of journalism overlaying content. Community broadcasting must play a role that misinformation and disinformation is minimised.

The future for community broadcasting is local. However, that doesn't mean to say it can't be global too. If you are too niche, people will listen to you for a while but will go elsewhere for the other information that that they want.

- **Several research participants said that local journalism should be considered an essential service in communities facing a classic market failure (and therefore be paid)**

In some parts of the country (e.g., under-served regional areas and remote Indigenous communities), there is no longer the basis for a profitable news business. However, there is compelling public interest in information dissemination, particularly at times of natural disasters and public health crises. Regional Australians might also rightly ask, 'Is our capacity to get diverse and up-to-date information dependent upon whether people are paid or not?'

There is a difference between paid professionals and volunteers. Reliability and consistency. A volunteer is not always available. There are also issues around rigour and quality. A professional can be held accountable whereas volunteers cannot. While we can make journalism economically viable, it is equally true that we can't get good journalism for free.

It would be unwise to wait for crises to strike again before reinvesting in this critical community infrastructure. While it is always complex for governments to fund media, the needs-based case is straightforward. According to the people who participated in this study, there is a demonstrable need for community broadcasting but no market solution: the government should step in.

Public interest journalism is a very particular kind of journalism. It is not influenced by profit and tells different stories because they are in the public interest. Hence, it is fraught for government to fund it. The government needs to be subject to public scrutiny. So, it comes down to a philosophical discussion of what journalism brings.

7. Volunteering

7. Volunteering

As changes in Australian society and volunteerism play out, community broadcasters will need to listen to volunteers more but rely on them less

- **Volunteering in Australia is changing because the Australian community is evolving**

The recently released National Strategy for Volunteering makes the case for change in how volunteers should be viewed and managed based on societal shifts underway in post-pandemic Australia. The top five most relevant to the community broadcasting sector follow.

First, the Strategy reports that there is a decline in formal volunteering, resulting in fewer volunteers overall. This trend will disproportionately impact direct service organisations, including voluntary emergency services. Working Australians are more likely to be connected to their work 24/7, making it difficult to establish a boundary between work and volunteering. Younger Australians are more conscious of maintaining a work/life balance and so may be reluctant to take on volunteering responsibilities (at least in terms of ongoing commitments), requiring organisations to offer more flexible volunteering roles. The rising generations of Australians (Millennials and Generation Z) do volunteer but they are more likely to do so informally rather than formally. First Nations Australians also volunteer in their communities, but they are much less likely to call it 'volunteering'.

> *While declines occurred across age groups [during the pandemic], younger people have been slower to return to volunteering. That is due to cost of living and agency. Young people are active in communities, but they do it outside of organisational structures. If organisations want younger people, they need to make opportunities more flexible and attractive.*

> *There is a difference in how people categorise their activity in remote and regional areas. Aboriginal people and people who live in the bush don't consider a lot of things to be volunteering.*

Second, there has been an overall decline in volunteering since the onset of the Covid-19 pandemic. According to Volunteering Australia, 36% of Australians volunteered pre-pandemic, but only 26% of Australians have returned to their volunteer roles (a decline of almost 30%). The community broadcasting sector fared better than average, losing only 17% of its volunteers over the same period.

Third, Australians are living longer and experiencing a higher quality of life, well into old age. This means that volunteers are seeking vibrant volunteer careers that will make the most of their skills and experience in later life. Volunteers of all ages are attracted to 'for-

purpose' volunteering opportunities and want to ensure that their free labour is going to advance the mission of the organisations that they work for. They also want to be heard. So, organisations are going to need to consult their volunteers more about how they want to spend their time. They will also need to better articulate their purpose and 'connect their passion with the mission of the organisation'.

> *Most of the people are volunteers and are passionate and valuable. We need to make sure we invite people in to share their passions and perspectives. We can overlook the satisfaction that people get from being part of community broadcasting.*

Fourth, widening income inequality and the rising cost of living makes volunteering increasingly a 'privileged opportunity', putting it out of reach of many working Australians. Fewer volunteers will thin social networks and reduce the number of connections into the community.

> *I recognise that volunteering is a privileged act because it is difficult to give free labour when you don't have a secure income. For a long time, I lived on 'the dole' and 'worked' at the community radio station full-time. I was a dole-bludger, but I felt that this was an important part of Australian culture. I could afford it then because I was a student and I didn't need much. But today, people don't have that choice. People can't choose to be poor and just volunteer.*

Finally, volunteers are needed more in regional Australia but there are fewer of them. The fact that Australia is one of the most highly urbanised countries in the world means that regional and remote areas have low population densities, creating geographical and other barriers to volunteering. Some skills are in short supply in regional areas, making it challenging to find the full range of expertise needed to govern and manage a community radio station.

> *Life in rural and regional Australia and capital cities is different. Far more aspects of community life are supported by volunteers in regional areas than in capital cities. Therefore, the fall in volunteer numbers will have a more dire impact on regional areas.*

- **The business model underlying the general geographic licence in sub-metro and regional areas relies heavily, perhaps too heavily, on a free volunteer workforce**

As noted under Insight #2 on financial sustainability, some research participants said that stations, the sector and the government may all need to recalibrate their expectations of volunteers.

> *[The] First Nations part of the sector is an employment model. A lot of parts of the sector rely on volunteers to do too much. In the rest of the sector, we need to ensure the structures for volunteerism are not exploitative. Getting the balance right will be difficult. It might mean supporting organisations to have position descriptions and induction programs so that volunteer expectations are contained.*

The community broadcasting sector is like other large not-for-profit sectors in Australia, such as Surf Lifesaving or Landcare, where paid employees and volunteers work alongside one another as part of one workforce. Volunteering Australia says that the organisations that successfully manage their volunteers manage them in the same way that they manage paid staff. They create job descriptions, set key performance indicators and manage the

performance of volunteers as they would employees. Ultimately, this results in a win-win situation for both volunteers and the organisation.

> *For those orgs that do it well, they have an integrated/seamless approach to how they get their work done. We rely upon and engage our volunteers in the same way as our paid staff. We value them as much. Those that are not doing it well treat the two groups differently.*

- **The most successful volunteer organisations do not give volunteers the jobs that no one else wants to do**

Community broadcasting organisations will need to do more to allocate resources for paid administration, since administration is rarely seen as a mission-critical activity. The decisions around who gets paid and who doesn't are not easy, but there will not be sufficient funding to pay everyone at every station. So, hard discussions will be needed within stations, within peak bodies and within government about which parts of the sector are so essential that they need to be supported by paid staff.

> *In individual stations, there are hard conversations around who gets paid and who doesn't. It was the case with Aboriginal and ethnic broadcasters. As a sector, we need to provide a framework of what we are trying to get from those roles.*

> *It does mean moving them out of administrative roles. One of the things that we hear is that people volunteer for an organisation because they believe in the mission, but they can't see how they impact the mission. Too often, volunteers are given the jobs that no one else wants to do.*

> *If the volunteer can say 'what I did today directly impacted the mission of the organisation' then that is a good outcome.*

> *I want to see people rewarded in a more generalised way. We make a false distinction between volunteerism and work. That is because of economic and time pressures. It is becoming increasingly difficult to attract volunteers. The Indigenous sector recognised that you want to give people some income for their time. Otherwise, you are attracting people who can afford to volunteer. We need to make it easier for people to participate and that might mean compensating them. It might not be a market wage, but something that helps them get across the line.*

- **An intergenerational transfer of leadership is taking place as the original licence holders of the 1980s and 90s retire and hand over control to their successors; managing the transition will be key**

There was considerable angst expressed through interviews and focus groups about the lack of young people in community radio stations today. Some said that today's young people don't need to volunteer at a radio station to make content; they can do that it in their bedrooms and distribute it on social media. Others said that post-pandemic, young Australians were keen to emerge from their bedrooms, make content with others and broadcast it to a much wider audience than social media can offer. However, volunteers are still needed regardless of age.

We are at a point where the founders are leaving, and we need to look at new ways of doing things.

Young people used to volunteer at stations but now they don't need to volunteer, they can make the content at home. There is a cultural issue that makes it harder for young people get involved in stations – stations are run by older people who apply their standards to how things were when they were young. There needs to be more flexibility around volunteering.

Some long-tenured volunteers said that the fear of ageing volunteers is misplaced. They said that community radio stations have always been older because it is older people who brought the skills and had the time to run radio stations in the early years.

Older people will still be the people who will gravitate to radio stations because they have time. There will still be people retiring over the next ten years. So, they will still come in as volunteers and workers.

We are looking at newer arrivals and that means people who are younger. When you get someone younger (under 70), say 45, they inject a lot of energy into the station. The programs that stick are not produced by young people; they are produced by middle-aged people.

The key will be to manage the transfer in an orderly way and increase understanding and cooperation between all generational cohorts. The people who participated in this study said that communication, consultation and, most of all flexibility, can help to close the generation gap and smooth the transition.

We need younger generations to take up the torch. If you ask them, they will accept that. If you want to support young people, you have to share power with them.

We have a few programs where older programmers are interviewing younger people about what they are interested in. By getting younger people involved in the older person's program, it leads to them wanting to be trained.

8. Training and innovation

8. Training and innovation

Training is the acquisition of new skills and innovation is the process of learning how to do things differently; the community broadcasting sector will need to encourage both over the next decade to realise its vision for the future.

TRAINING

Providing broadcast training was one of the original policy objectives when community broadcasting was established in the 1970s. Since then, many retired community, commercial and public radio presenters, programmers and technicians have volunteered their time to train first-time broadcasters, young and old. In 2010, the Community Media Training Organisation was established as a registered training organisation (RTO) to complement the training activities undertaken by stations and sector RTOs and sector peak bodies. Policymakers acknowledge the role of community broadcasting in providing 'subsidised training' to some of Australia's most well-known media personalities.

> *There is a bit of a development/employment pathway in the sector. I know that the ABC and SBS have benefited from the training delivered through the sector. 'Subsidised training' benefits the public broadcasters. For example, when the previous government tried to shut down community television there were many high-profile voices opposed.*

- **The number of people who progress through community broadcasting to take up successful media careers was suggested as one outcome measure of the impact the sector is having on Australia and its media**

While there has been a lot of commentary about youth producing content alone from their bedrooms, trainers said that 'young people have never been more interested in media training than they are today'. Industry representatives said that there is always strong demand for training in 'producing audio, sound design and sound engineering'. Some people said that the most pressing need within the community sector is for training in how to distribute content on multiple platforms simultaneously. Training also has a role in ensuring that new entrants to the sector reflect the broader Australian community.

> *The focus needs to be on artists but broader than that. It also needs to focus on skills, like producing audio, sound design and sound engineering.*
>
> *How do we develop the skills of the next generation of broadcasters? We are trying to break down barriers for women and diverse Australians. Music is not just a man in a rock band. There*

are so many players in this creative industry. The role of community broadcasting is to bring people along as apprentices. That is a measurable impact.

- **First Nations broadcasters need training, but the incentives need to change to make it more appealing**

   There are various initiatives and organizations that focus on supporting and providing training for Indigenous peoples in the sector. Even so, the need for training within the First Nations media sector is acute, according to the study participants (see Insight #4). They believe that First Nations broadcasters need to be trained to maintain broadcast and reception equipment and they need the confidence training imparts to a presenter when they are 'the only voice' on air. Importantly, the stigma attached to broadcasting training as 'work for the dole' needs to be removed to ensure the full uptake of training opportunities.

   When something breaks, there is no one to fix it. If it is a problem with the set top box or the satellite dish, we have no one to fix it. There are no instructions in Aboriginal languages. We did an experiment and broke some boxes, and our tech couldn't access information on the Internet and work out how to repair it.

   There is a critical role that community radio could play in supporting First Nations artists in producing music. The Aboriginal Music Association has put in a submission saying that community radio has the equipment and facilities that would help them lead Australian music development.

   We have only just touched the surface of showing people how vital they are to their community. I am the only voice on the airwaves now and I feel out of my depth. Can we get training so next time we feel confident doing it? There should also be support for them in dealing with the trauma of doing that because they are not professional journalists.

   It has to do with the incentives for training. Many Indigenous people are required to take it to receive welfare payments. We need to change the incentives and make training the best and as vibrant as it can be.

- **Increasingly, peer-to-peer coaching has been found to be more successful than formal classroom training**

   Video training modules and live video are making coaching a viable option for more young broadcasters, particularly in remote Aboriginal communities.

   Mentoring is a massive trend. Having someone with experience coming alongside you and giving assistance is the best. Peer-coaching/peer-creating is very popular. People create a video of how to do something and we put it in the course for other students.

   However, coaching should not be limited to individuals. Representatives of some peak sector bodies say that stations that are run by volunteers would benefit more from coaching that complements formal training on subjects like fundraising.

INNOVATION

If training is the acquisition of new skills, innovation is about learning how to do things differently.

- **The community broadcasting sector is a 'place for experimentation' and has logged some impressive firsts, like podcasting**

    The sector is a hive of innovation because it has a steady stream of new people cycling through learning how to do things and asking questions like, 'Why do we have to do it that way?' Volunteer organisations are innovative because the risk of failure is lower than in commercial or public organisations. One of the things research participants said the sector should not let go of was its 'lack of polish' and the fact that it is a 'place where we can go to figure things out'.

    > *I think the sector is good at trying things before others. We created podcasts before anyone else. The sector is a place where you can come and experiment. 2SER put an AI-enabled robot on the air to see if people would notice. They did, but it was a good experiment. NEMBC has a translation service where they translate government media releases and distribute them. They took a gap in the market and filled it quickly.*

    Innovation was accelerated by necessity during the Covid-19 pandemic because new ways to do routine tasks had to be discovered to stay on air. One innovation – remote distributed radio production – enabled an entirely new cohort of broadcasters with disability to produce content. While other volunteers are returning to physical studios, broadcasters with disability will continue to participate in community broadcasting from the comfort of their homes because of this innovation.

- **Innovation in audio program content is an area where community radio has been successful in the past and could be successful again in the future**

    Community radio has a solid track record in terms of developing innovative program formats. Research participants recalled 'The Wire' as an innovation in terms of current affairs programming. According to one research participant, innovative content will be needed to compete with social media for listeners' attention.

    > *The thing that will bring attention to our content is producing groundbreaking, innovative work. How do we lead? I don't mean breaking stories but in creative ways of using audio and how we program music. We are the place for experimentation.*

    > *[The] main competition for radio is people's attention. Radio stations used to compete with one another. Now, radio's enemy is TikTok, work email and other things on the Internet.*

- **Interestingly, technological innovation was not seen to drive innovation in the community broadcasting sector**

    While technology undoubtedly plays a critical role in community broadcasting, the sector has rarely been resourced to be a leader. Historically, the community sector has followed

commercial radio expansion in areas such as digital audio broadcasting. Some said that while ten years might seem like a long time, it is not in terms of technological development. They observed that while there has been significant technological change with the advent of TikTok and Artificial Intelligence since 2013, it has not been 'upside-down change'. They predict that the technologies that will dominate in 2033 are already in plain sight. It will simply be a matter of picking which technologies will be the winners.

Ten years is not that long a period. In the past ten years, things have changed but it has not been 'upside-down change'. Apple is currently promoting 'dynamic sound'. Does that mean that we should move to dynamic sound? That is an example of something I had not heard of yesterday that is currently being rolled out.

The technology that is likely to be key in ten years' time already exists. Year on year, its usage is increasing. As the age of free-to-air TV comes to an end, it is that suite of platforms that access visual content: streaming platforms, smart phones and smart TVs. The onus is more on us to ensure we are part of those growing platforms rather than leading audiences to the technologies.

While the community broadcasting sector may not always be a technological leader, neither can it afford to be complacent. For example, it may be premature to predict the demise of analogue AM broadcasting, given its dominance of talk-back and sports broadcasting and because AM radio signals can travel longer distances than FM or other higher frequency radio signals, making it ideal for regional areas with less infrastructure and more dispersed populations. While 'Teslas may be too cool for radio', other electronic vehicles are likely to ensure access to the AM band because consumers want to access that content.

- **The most transformative technology is likely to be around audience measurement**

The people who participated in this study said that audience measurement technology – both passive through metrics like website hits and active through permission-based wearable monitoring devices – will have the most impact on the community broadcasting sector when it becomes widely available. The goal will be to measure not just the size of the audience but the impact that the content is having on them using AI-enabled impact trackers.

Technology is complex and expensive. One research participant advised that this is an area where the sector, working with the government, should secure the technology, rather than individual stations. The sector's peak bodies would also be the natural negotiating party to work with Big Tech to secure access to global streaming platforms used by smart speakers and in-dash digital audio systems. They cited the successful precedent of the CBAA's Community Radio Plus app where national leadership was able to deliver what no station or sector peak body was able to previously.

The stations don't have the capacity to make the most of innovation. So, what centralised service would help without 200 small stations reinventing the wheel? Infrastructure or distribution deals?

CBAA has to do more of what they are doing with the app. That's the hub model. No station can develop an app and make sure that we are on Alexa and Sonos. How do we think about technology at a sector level, not as individual stations.

- **Innovation is a never-ending process;** *Roadmap 2033* **is just the beginning**

Roadmap 2033 is the beginning of a process to ensure innovation remains a vital part of the plans of the community broadcasting sector. In the future, the sector will need to constantly scan the horizon and respond to trends to innovate. As a sector that belongs to the community, the community broadcasting sector will need to respond to changes in the community.

> *One thing we have not talked about is flexibility/responsiveness. How do we ensure adaptability/flexibility over the next ten years? Five years ago, we didn't foresee the need to amend the financial model for a pandemic or natural disasters. Are there any other things that we need to be conscious of as we set the Roadmap forward?*

9. Diverse broadcasting

9. Diverse broadcasting

While a range of diverse broadcasting groups have developed separately, the future promises greater integration of video and audio content and greater collaboration among the various sector bodies.

COMMUNITY TELEVISION

Community television has recently been given a renewed lease on life by the new federal government. After nearly a decade of uncertainty, community television broadcasters can look forward to some stability and dedicated funding.

> *Stability and security. It's so much nicer to be involved in something that is ongoing. It all comes back to a permanent licence. It has been super disruptive to have to coordinate political campaigns. A two-year extension goes really quickly.*

> *I would love to see the competition between TV and radio eliminated and have separate funding allocations. We are all fighting over the same pools of money.*

> *I worked at Channel 31 and some of the issues we saw is that people have ideas, but the station does not have money for producers. I tried to apply for funding, and they said, 'we don't fund TV'. You go to Screen Australia, and they say, 'Oh, you're from community, we don't fund that'. You quickly run out of money and favours.*

- **Television broadcasters see their future online. However, they need to survive long enough to make the transition from terrestrial to digital**

  Television broadcasters used their long period of certainty to imagine a different future … online. First Nations and student television producers share a common dream of being able to create professional content and distribute it over the Internet. However the business model is still tied to terrestrial services and funding is not yet available for online television stations.

  > *ICTV is based in Alice Springs, and we broadcast to remote Indigenous communities. Our vision is to secure technical and Internet-based services. We want language and graphics that are appropriate to Indigenous communities. We need more support for content creators. It's vital for Aboriginal communities to see themselves reflected in media. We want to see the service extension to the Internet supported by the government.*

  > *We are new. We are grassroots people creating content that will sit in the Cloud. We have only been on CH31 since 2020. We have faced the end of CTV twice now. Now, we are looking at*

2024. We are looking at a LGBTIQA+ platform in the Cloud. When I went to the CBF, they said 'We only fund terrestrial [licensed] stations'.

If the government allows us enough time, there will be a shift away from terrestrial broadcast. The Internet is scalable and can be built out. The other has physical constraints. The Internet is the way of the future. There is still difficulty in getting access to this technology. So, there must be more investment. It can be done.

▪ **Despite all the talk of merging audio and video content, some television broadcasters have reservations**

While several research respondents spoke with ease about merging audio and video content and distributing it across multiple platforms, people with experience in television production said that it is not yet that easy in practice to do so. Even if it were, some believe that the two mediums should be kept separate.

They are two different experiences. I have a range of experience watching screens as well. Some creators do podcasts and film them and you can choose if you want to look and listen or just listen. Even if you look at ABC, their digital offerings are different: there is the LiSTNR app and iView. The cost of producing the video portion would have to be so low and so easy to do and the quality to be acceptable to turn a podcast into a watchable TV show. Now, it takes a lot of effort.

My background originally was in journalism – print, radio and tv. I don't want to see myself on TV. I see them and want them to be two very distinct things. The merging makes me uneasy.

RMITV [RMIT University's student-run television production house] has made that combination of content. Having done that, I agree. They should be kept separate. The skills can inform each other but the two mediums are separate.

Other diverse broadcasting

There are three other forms, or sub-sectors, of broadcasting that received attention during the Discovery Phase of this project: ethnic broadcasting, faith-based media, and radio for the print handicapped.

▪ **Participants expressed concern about the terminology used to describe the broadcasting sub-sectors and said that it should be updated**

While there was a clear consensus to not change the name of the community broadcasting sector, there was equal disquiet over the names of the sub-sectors. Adopting new terminology is part of the job of developing a more positive narrative. To change the story, decisions need to be made about which bits to leave behind.

If any politician or presenter were to say, 'want to thank 'Radio for the Print Handicapped' or 'ethnic media' they would be booed off the stage. If they wouldn't use that language, why should we?

'Ethnic' or 'multicultural' broadcasting

As Australia continues to become more ethno-culturally diverse, it is appropriate that multilingual broadcasting evolve with it. The term 'ethnic' was said to 'other' non-English speaking Australians and should be replaced. The most popular alternative was 'multicultural media' but this phrase has reportedly been tried before. Some said that 'it's a waste of time discussion' and a decision to change the name would need to be made through a 'central agency' of government. Younger people said that they 'despise' the name and support changing it within the next ten-year period. The name of the sector representative organisation, the National Ethnic and Multicultural Broadcasters' Council (NEMBC) has both bases covered in its name, but to sidestep the issue, it largely uses the acronym NEMBC in its branding.

> *Since the word 'ethnic' was owned by the people who liked that word, 'ethnic' is used across the sector. You would have to wait until that gets resolved. It would need to be done through a central agency.*

> *As a younger person, I despise the name 'ethnic'. Identity has become much more complicated.*

> *Maybe we should stop referring to it as the 'ethnic sector'. Migrants are 60 per cent of the population, but younger people don't feel the same way today as they did 40 years ago. We want to be inclusive of younger and older people and some young people might find that term a slur.*

> *I love the idea of moving on from 'ethnic'. The term 'ethnic' is linked to White Australia.*

'Christian media' or 'faith-based broadcasting'

The technical term 'faith-based broadcasting' is used within the sector, but 'Christian media' is used more often because Christian Media & Arts Australia is the sole faith-based organisation represented around the community broadcasting sector roundtable. While Christian media is one of the largest and most successful sub-sectors of Australia's community broadcasting sector, CMAA doesn't represent the diversity of religious belief in this country – nor should it. With increasing ethno-cultural diversity has come multiple faiths.

> *If we believe in freedom of religion, we can't shut any other faith out. One of the great things about Australia is that it is multicultural and multi-faith. An Inter-Faith Council of Broadcasters is an idea worth investigating.*

'Radio for the print handicapped' or 'Disability Media Australia'

Virtually every research participant in this study said that RPH ('Radio for the print handicapped') is a name that is seriously out of step with the times. With a Royal Commission, active representation in the Senate and National Disability Insurance Scheme services, people with disabilities of all kinds are finding their voice and exercising greater mobility and independence. While RPH Australia provided a needed service to generations of people who are blind or who have low vision, accessible technology now provides a ready solution to reading text, at least on a computer. The representatives of RPH Australia who participated in this study said that they are actively working with the CBAA to create a pan-disability broadcasting organisation with a new name that better reflects its expanded

mandate and purpose. That said, the organisation doesn't want to walk away from a 40-year heritage of providing a valued service.

> *The Radio for the Print Handicapped concept came out of the US in the 1970s. Two academics started the movement here. It was 'cringeworthy' noblesse oblige. The 'h' in RPH is the elephant in the room. We have made plans to depart from the dreaded 'h'. We also plan to move from the paternalist 'for' to the empowering 'by' but I can't tell you the name just yet.*

> *Don't throw the baby out with the bathwater. Reading material is our promise to the community. There is a negative view of RPH [Australia] because of the name but we are doing some really great things. I get concerned that there is a good chance that this broader disability focus won't work.*

- **All sector peak bodies who participated in this study said that they would like to collaborate more with one another**

Even though all broadcasting sub-sectors are part of the community broadcasting sector, they have developed independently of one another. One research participant described them as silos. Christian broadcasters have expressed an interest in working with First Nations media because of the high number of Aboriginal and Torres Strait Islander Christians. Similarly, they would like to work with ethnic media because of the crossover between certain ethno-cultural backgrounds and Christianity. Broadcasters with a disability would like to work across both the faith-based and ethnic sectors because each group has members who live with disability. Ethnic broadcasters would like diverse backgrounds to be part of the mainstream. There is scope for more collaboration across the sector.

> *Are we really serving the Christian community? No, we are serving the white English-speaking Christian community. We are working on a couple of Indigenous stations, but we should ask how we serve those other language groups. We will be interested to have that conversation with the NEMBC.*

> *We need a collaborative approach. I would like to see people with disabilities working with ethnic stations to translate content into languages other than English.*

> *The NEMBC Conference is the most vibrant event you have ever been to. The missing piece is the mainstream stations being invited into that community, not the other way around. In places like Melbourne and Brisbane, the ethnic stations have very good relations with the mainstream, but it is limited to the top level.*

- **There is an opportunity to tell a fresh story of diversity about the community broadcasting sector**

The great irony of the community broadcasting sector is that while it trumpets its diversity, most people experience it as a monoculture – one station at a time. It is only at the sector level that the diversity shines through. While a strong emphasis has been placed on demographic diversity, there may be an opportunity to tell a new, fresh story of diversity in the community broadcasting sector. The story of a community of communities – a story that recognises the diversity inherent in each participant in this multifaceted sector.

10. Policy and regulation

10. Policy and regulation

If governments want community broadcasters to deliver public value, they need to refresh their policy settings and use their funding to unlock the potential outcomes the community broadcasting sector can deliver

As noted in Insight #1 on purpose and identity, the community broadcasting sector can deliver myriad outcomes representing significant public value to the Commonwealth, including:

- Increased First Nations representation and participation
- Enhanced trust in media and government
- Greater community well-being and resilience
- More social cohesion
- Equity, inclusion and diversity on the airwaves and online
- Enriched Australian arts and culture, including First Nations culture
- Added skills and capacity building.

However, according to the people who participated in this study, the federal government needs to review and refresh its policy settings for community broadcasting (and broadcasting in general). While the legislative and regulatory framework for community broadcasting was seen as a social innovation in the 1970s, it is viewed by many as seriously out of step with the Australian community today. It is inconceivable to some that the *Broadcast Act 1992 not been adequately updated to account for the* Internet.

Several suggestions for reform emerged from discussion with research participants. While these suggestions are outlined in broad detail, they are consistent with the suggestions made in the previous nine insights of this study. While some of these proposals are the subject of active discussions, others would require further detail, discussion and debate before they could be presented to policymakers.

- **Classify stations based on proposed community impact, not just community interest**
  - At present, licence holders have the complete freedom to nominate a community interest of their choice. Unfortunately, more than half of all licences are tagged with the community interest tag of 'general geographic area'. As pointed out in Insight #2 on financial sustainability, it is challenging to market anything that is general. By contrast, the impact a station pursues would be utterly unique to a particular station, adding clarity to their mission, purpose and business model.
  - Evaluate the sponsorship model to determine if it is still fit for purpose and can deliver the revenue needed to support station operations.

- **Focus on purpose, not participation**
  - Measure outcomes linked to a licence holders plan for community impact, not solely through outputs like the number of volunteers or members
  - Invest in cost-effective sector-wide measures such as permission-based digital monitoring technology that can be independently used by government to evaluate how stations are meeting their stated purpose
  - Replace the current 'complaints-based review system' with a regular review of how a broadcaster has had the intended impact on the community.

    There needs to be more flexibility in government regulation. There needs to be a focus on outcomes, not inputs or outputs. ACMA is so focused on access – how many people on committees. However, we don't measure how we are serving communities. That would be a change that would really help.

    At present, it is driven by complaints. I don't want to put another burden on stations to go through a review. However, when licence renewals come up, there should be proper oversight of the evidence that the station is having an impact.

- **Expand access to fundraising by simplifying regulation**
  - Work with the Australian Taxation Office and the Australian Charities and Not-for-Profit Commission (ACNC) to streamline the deductible gift recipients (DGR) registration process for community stations:
    - By removing the requirement to also be registered with the Register of Cultural Organisations
    - By giving all registered charities DGR status.

- **Support the training of more First Nations Broadcasters**
  - Enhance training for Aboriginal and Torres Strait Islander broadcasters:
    - Offer courses in presenting, production and the maintenance of broadcasting and reception technology.

    I would love to see Indigenous people trained in maintaining infrastructure in remote communities. One of the priorities is that Indigenous people are not receiving television because people are not maintaining television dishes. At that infrastructure level, there is a lot that needs to be resolved. People don't have radio in their homes. It's about how people receive the content. It promotes ownership.

    There is a shortage of culturally appropriate producers. I would like to go to communities and get people to be trained as producers.

- **Secure quality information and local news production in areas of need**
  - Identify areas that are currently underserved in terms of local news gathering and public interest journalism
  - Classify and fund core journalism roles in stations located in areas of need
  - Continue to fund and support the CBAA Enhanced National News Project.

- **Support community radio stations to serve as emergency broadcasters where needed**
  - Work collaboratively with the National Emergency Management Agency to ensure the sector can provide a complimentary role to the ABC in disaster-prone areas of the country

- o Classify and fund core emergency broadcasting roles in stations located in disaster-prone areas
- o Provide training for paid staff and identified volunteers to fulfill emergency broadcasting roles
  Provide mental health support post-disaster to all broadcasters and emergency services personnel.

- **Protect access to the radiofrequency spectrum for community broadcasters**
  - o Guarantee access to the radiofrequency spectrum for established community television stations until such time as they can migrate to only online services.
  - o Ensure that community broadcasters can access the radiofrequency spectrum where there is a demonstrated community need
  - o Advocate for ACMA to be provided appropriate resourcing to ensure timely licence area plans (LAP) planning is undertaken.

  I would say that community broadcasters are an essential service and that they should have access to transmission access. It is either subsidised transmission access or a requirement for commercial stations to accommodate community stations at no charge.

  The reality for community TV is that if we are going to achieve our vision of being a viable, relevant extension of what community TV has been and a future-proofed platform, we would need to have increased stability afforded to us through our remaining years on free-to-air television.

- **Update online television and radio broadcasting regulations**
  - o Update the Broadcasting Services Act 1992 to recognise the role that the Internet can play in distributing community television and radio content.

  The regulation is a little clunky. It focuses on AM/FM licences and doesn't take into account the other ways that stations engage with audiences.

  If you put all the listener demand onto the mobile device, it won't work under the current technology. The telcos would be forced to make it work. We would have to have a legislated right to be there. There will be only so much you can fit through the mobile device, so it will need to be licensed. The only reason it works at the moment is that not many people are listening to it. We will still need a legislated regime if we want to preserve these services into the future. We need a solid basis of why we exist.

  When the digital space starts to become more prominent, you will see it regulated like things are now. At the moment, spectrum is shared and so we are regulated. They are starting to regulate the digital space now, like Facebook.

  We should think about micro-stations (e.g., 'Unearthed' from Triple J). We should be open to multiple forms of distribution. We should have a way of recognising community content producers online the way we recognise community broadcasting … Locally focused, not for profit, and does have the same mandate as the mainstream media. It exists everywhere online but you don't know it.

Top ten trends

The top ten most likely and most important trends that have the potential to impact the community broadcasting sector positively or negatively over the next decade

Agile organisations regularly scan the external environment to identify and anticipate trends that can help or hinder their mission. Thirty external trends were identified through a literature scan. The trends were then rated by participants in the first Leadership Forum in two ways: according to how likely they are to materialise in the next decade and according to the impact they could have positively or negatively if they were to materialise. Only the top ten trends which are both the most likely and the most important are listed, as it is counterproductive to watch too many trends simultaneously. Focus needs to be maintained on those most likely to have the biggest impact.
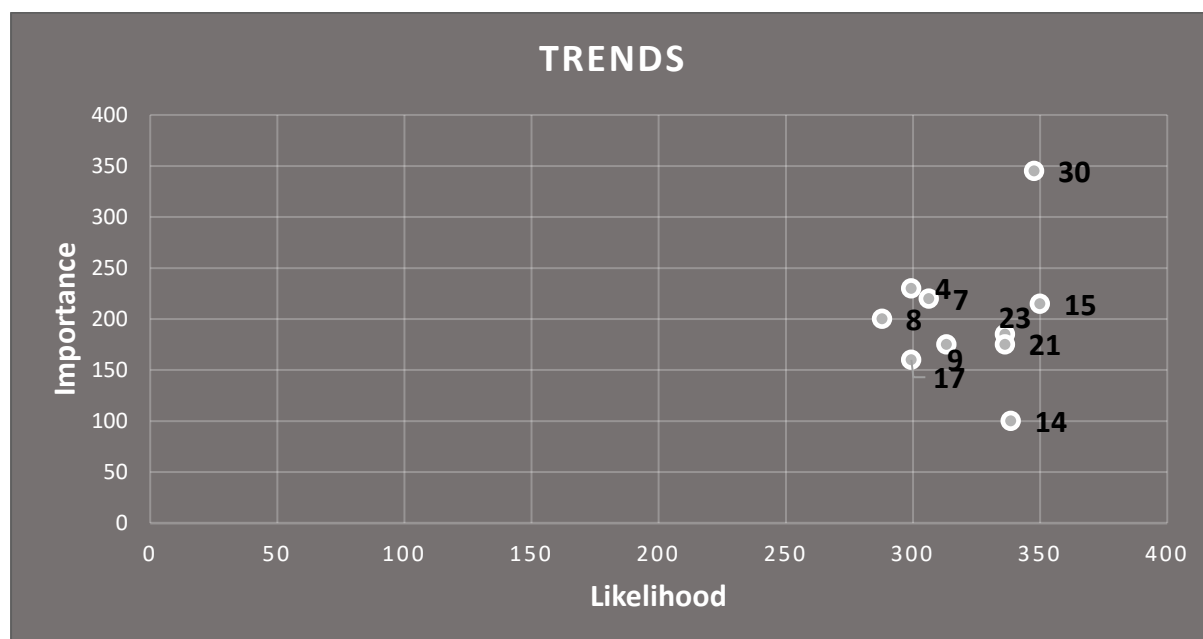
Rank

  1   Increasing need for localised communications, before, during and after climate-related natural disasters (30)

  2   Greater prominence of and control over stories by and about First Nations peoples (15)

  3   Further media consolidation intensifies 'news media desertification' in regional Australia (4)

  4   Pressure to maintain and grow sponsorship will continue to increase, exacerbating financial insecurity of stations (7)

  5   Governments shift funding from activities to outcomes (23)

  6   Government support for community broadcasting remains constrained (8)

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7   Ongoing migration from analogue radio to in-dash digital systems in new cars (21)

8   Increasing reliance on fundraising to support community radio stations (9)

9   Increasing empowerment of people living with disability (17)

10   Increasing multicultural diversity in regional Australia (10)

Top ten overall

The need for localised communications before, during and after climate-related natural disasters was rated as the number one trend overall that has the potential to have an impact on the community broadcasting sector over the next ten years

The need for disaster preparedness, emergency and recovery communications was rated as the single most important trend that is likely to impact the sector to 2033 and the second most likely trend to materialise over the next decade. However, Leadership Forum participants interpreted this trend more broadly. They said that focusing solely on climate-related emergencies is too narrow a definition of the sector's responsibilities. Community broadcasters have the capacity to assist with a range of emergencies, such as mental health emergencies in remote communities, and a broader perspective of broadcaster's capability to help should be considered.

Leadership Forum participants saw opportunity in this trend. They said that broadcasting information before, during and after emergencies would increase the reputation of the community broadcasting sector for 'trustworthiness' and 'reconfirm our uniqueness'. They said that stations could leverage their deep local connections to 'amplify community resilience'.

Economic and social trends are seen to have equal potential to impact the community broadcasting sector in the upcoming decade

Unsurprisingly, three of the top trends that are likely to impact the sector are economic. Participants in the first Leadership Forum said they felt 'pessimistic' about responding to the 'pressure to grow and maintain sponsorship' levels. However, they also recognised that this trend provides an opportunity to find new ways to attract sponsorship. They also said that if this trend were to materialise as expected, stations would rise to the challenge of better communicating the value of community broadcasting, increasing data collection and analysis, and developing 'layered marketing strategies' that could appeal to local, regional and national sponsors.

They were equally 'pessimistic' about responding to the trend of 'government support for community broadcasting remaining constrained'. Nonetheless, some Leadership Forum participants interpreted this trend as an opportunity for the sector to develop 'self-sustainability' by achieving 'back-of-house efficiencies', develop shared 'content hubs', and share learnings to 'diversify revenues independently of government'. At the same time, other participants saw this trend as a wake-up call to 'get better at providing evidence of the value and impact of community broadcasting' and to demonstrate that funding for community broadcasting represents an excellent return on investment.

Leadership Forum participants were more 'neutral' in their feelings about the 'increasing reliance on fundraising' but saw this as another opportunity for cross-sectoral collaboration and support by sector representative organisations because fundraising can be a resource-intensive activity. They noted the success of the Christian Media Sector when it has actively supported stations to develop greater fundraising capability.

The next decade is shaping up to be one of the most critical decades in the journey to self-determination for Australia's First Nations peoples, beginning with a constitutional referendum to enshrine a Voice to Parliament expected in late 2023. This was reflected in the ratings given by Leadership Forum participants to the trend of 'greater prominence of and control over stories by and about First Nations peoples' receiving the top rating in terms of likelihood and the second highest overall rating. Leadership Forum participants see the coming decade as an opportunity to grow the First Nations media sector and to strengthen links with non-Indigenous broadcasters across the country. With that growth will come opportunities to increase the participation of First Nations peoples in the broader broadcasting sector. They said that by working together, the sector, can 'strategise, share and strengthen' the 'expanding voices of Indigenous peoples'.

'Increasing empowerment of people living with disability' and 'increasing multicultural diversity in regional Australia' rounded out the top three social issues contained in the top ten overall. Increasing the amount of content by and for people with disability is an opportunity that RPH Australia and CBAA are already pursuing, with assistance from the Commonwealth's Department of Social Services. The pandemic demonstrated the value of an active multilingual broadcasting service to non-English speaking communities in need of critical government information. That precedent will be front of mind as the sector plans the next ten years of multicultural community broadcasting.

Trends in media and policy/regulation were rated more highly than technology

Interestingly, Leadership Forum participants were not prepared to back any specific technology. Instead, they said the sector needs to be ready to follow listeners to their technology of choice. The sole technological trend, 'ongoing migration from analogue radio to in-dash digital systems in cars', only came in at seventh place. The 'increasing media desertification in regional Australia' came in at number three and the predicted shift by governments from funding 'activities to outcomes' completed the top ten overall.

Participants in the first Leadership Forum rate environmental factors using 'Dotmocracy'.

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Appendix A – Top ten trends in detail

The trends below are listed on the scatter graph on page 55. The numbers in parentheses correspond to the numbers on the graph.

Rank	Factor/Trend	Importance/Current disruptive impact	Significance/Potential disruptive impact
1	**(ENVIRONMENTAL – 30) Increasing need for localised communications before, during and after climate-related natural disasters**	▪ Academic research at Griffith University shows that the media, particularly broadcast media, can play a critical role before, during and after natural disasters. ▪ The ABC holds primary responsibility for emergency services, but some community radio stations have been nominated to fulfil this role in parts of the country. ▪ Local or community media can also provide detailed information that networked commercial or public broadcasters cannot ▪ According to the CBAA, 80 stations broadcast during the 2019–20 bushfires. ▪ In Victoria, there is a scheme to recognise emergency broadcasters. While not all community broadcasters are accredited under this scheme, all stations can play a vital role in providing information for a community to prepare, recover and rebuild from natural disasters.	▪ As commercial and public broadcasters become increasingly networked and reduce local broadcasting hours and personnel, community radio may be the only live broadcast service available in some localities. ▪ Community broadcasters may be the only media who can effectively reach and communicate in languages other than English, including Indigenous languages.
2	**(SOCIAL – 15) Greater prominence of and control over stories by and about First Nations Peoples**	▪ Research collated by the Lowitja Institute (Australia's Institute for Aboriginal and Torres Strait Islander Health Research) indicates that the way First Nations peoples are represented in the	▪ First Nations Media is integral to the community broadcasting sector because it represents: o Almost one third of all community broadcasting licences (120/450)

Rank	Factor/Trend	Importance/Current disruptive impact	Significance/Potential disruptive impact
		media 'contributes to the marginalisation and erasing of First Nations peoples and their voices', 'shapes the relationship between non-indigenous Australians and First Nations peoples', and 'impacts on government responses to matters that concern First Nations peoples and influences related policies, programs, available levels of funding and legislation'. ○ 'First Nations representation in the media has a significant impact across many, if not all, of the socio-economic outcomes and targets [associated with the National Agreement on Closing the Gap]'.	○ One half of the Commonwealth Government's investment in community radio. ▪ The representation of First Nations Peoples will assume greater significance for First Nations broadcasters, First Nations Peoples, and non-indigenous Australians over the next ten years as Australia responds to the offers of Voice, Treaty and Truth extended through the Uluru Statement from the Heart.
3	**(MEDIA – 4) Further media consolidation intensifies 'news media desertification' in Regional Australia**	▪ The US Roadmap for Local News states 'local news is a public good essential to a healthy, inclusive and multiracial democracy'. ▪ Social Ventures Australia reports local news production in Regional Australia has sharply declined in recent years, with a steep drop-off during the Covid-19 pandemic. ○ The University of Canberra reported that there was a net contraction of 141 news production outlets in Australia between 2021 and 2022 (145 expansions and 286 contractions). ○ Public and commercial broadcasters have reportedly reduced the number of hours of local broadcast and are 'networking' statewide for longer periods each day	▪ This trend suggests a natural opportunity and competitive advantage for the community broadcasting sector. ▪ While quality localised news production has not proved profitable for commercial players, the sector can argue it deserves public funding support if the government agrees that local news provides public value. ▪ Given the cost of producing quality news, the sector would benefit from considering innovative ways to approach news as a collaborative whole since listeners are interested in hearing local, state and national news.

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Rank	Factor/Trend	Importance/Current disruptive impact	Significance/Potential disruptive impact
		▪ The same study identifies a strong appetite for increasing news localisation and 'localism is highlighted as a strategic point of difference for local community stations'. ▪ The Community Radio Listener Survey June 2022 reports that news and information is the number one reason for listening to community radio o Mainstream media under-represents the diverse Australian community. o Local news is particularly important to Indigenous Australians who 'tune in to hear people speaking in their language' but Indigenous Broadcasting Services are supported by government.	
4	**(ECONOMIC – 7) Pressure to maintain and grow sponsorship will continue to increase, exacerbating the financial insecurity of stations**	▪ According to the 2022 CBAA Shape of the Sector Report, stations overall are reliant upon sponsorship for 21% of their total funding (41% for youth stations and 37% for general stations). ▪ The CBAA 2021 Member Survey found that more than half of all stations (53%), two thirds of sub-metro (65%) and nearly three quarters of the smallest rural and remote stations (73%) listed difficulty in maintaining or growing sponsorship revenues as a key challenge (ranked first overall). ▪ According to a CBAA analysis of FY21 station financial statements, 7% of stations were classified at 'high risk' with a further 11% as 'vulnerable'.	▪ This is significant for the community broadcasting sector because sponsorship is key to financial sustainability: o Stations have a limited number of revenue streams (i.e., sponsorship, grants, fundraising, member/subscriber fees) and stations are limited to a maximum of five minutes of paid sponsorship announcements per hour.

Rank	Factor/Trend	Importance/Current disruptive impact	Significance/Potential disruptive impact
5	**(LEGAL AND REGULATORY POLICY – 23) Governments shift funding from activities to outcomes**	▪ Outcomes-based funding is a trend within public administration and philanthropy to measure the impact of social service interventions. ▪ According to the School of Public Policy and Government at the University of Toronto, 'By paying for outcomes, public sector leaders aim to enhance accountability and achieve greater social impact by redirecting funds to high-performing service providers'. ▪ To effectively evaluate outcomes from community broadcasting, stations and sector organisations need to clearly identify how they want to impact their community of interest and set up data collection to measure that impact. The process involves measuring how the community changes in positive ways in response to broadcasting, not counting the activities that the station undertakes to achieve that result. ▪ Over the past three years, the CBF has moved to outcomes-based funding for sector representative organisations and is gradually moving towards this for station-level grant recipients. ▪ In 2021, the CBAA appointed a Head of Strategy and Insights and is developing more sophisticated in-house data collection capability.	▪ Outcomes-based funding is significant for the community broadcasting sector because the CBF, like all organisations that distribute public funds, is increasingly expected to report against outcome measures for continued and increased funding. ▪ While *Roadmap 2033* will provide a framework for the outcomes which the sector is trying to achieve overall, each sector representative organisation and station will need to carefully consider how it wishes to serve its community and how it will measure the outcomes delivered. ▪ Outcomes measurement is particularly relevant for the community broadcasting sector given that progress towards fulfilling the National Agreement on Closing the Gap is expressed and measured in terms of outcomes.
6	**(ECONOMIC – 8) Government support for community broadcasting remains constrained**	▪ According to the CBAA 2022 Shape of the Sector Report, 33% of all station revenue comes in the form of grants (67% for Indigenous and 59% for Ethnic-General broadcasters).	▪ This is significant for the community broadcasting sector because government funding is key to financial sustainability.

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Rank	Factor/Trend	Importance/Current disruptive impact	Significance/Potential disruptive impact
		- According to the CBF, general purpose funding for station operations has not been increased in the previous 11 years (since 2011). - It estimates that there is a shortfall in development and operational funds for sector sustainability of between $8 and $11 million. - Funding for Indigenous Broadcasting though NIAA has not increased since 2009. - When cost of living increases are factored in, sector funding has been going down over time. - While the new Commonwealth Government announced $4 million per year in funding in the October 2022 budget, this simply restored funding to previous levels. - More recently, the government has recommended increased support for community broadcasting through its new cultural policy. However, the need for budget repair may limit future investments.	- Funds for development and operations are particularly constrained because large percentages are pre-allocated to diverse services, including First Nations, culturally and linguistically diverse stations and radio reading services, leaving between $2 and $3 million dollars of discretionary funding for distribution by the CBF. - For hundreds of applicants, this is the only funding pool upon which they can draw.
7	**(TECHNOLOGICAL – 21) Ongoing migration from analogue radio to in-dash digital systems in new cars**	- Australians continue to listen to radio in the car because they can listen and focus on the road simultaneously. - According to Edison's The Infinite Dial, '31 per cent of Australians 18+ have ridden in a car in the last month that has an in-dash system that receives information/entertainment over the Internet', up from 25 per cent in 2021.	- As several qualitative research participants said, 'It is not important how you broadcast, but how the listener receives the content'. - Car audio technology has been a critical consideration for radio broadcasters for many years. - Unfortunately, the community broadcasting sector cannot lead on this issue. It will need to watch what car makers do and follow the moves of commercial and public broadcasters.

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Rank	Factor/Trend	Importance/Current disruptive impact	Significance/Potential disruptive impact
		▪ However, the same survey also reported, '80% of Australians 18+ who rode in a car in the past month listened to an AM/FM DAB+ radio in car'.	

8	**(ECONOMIC – 9) Increasing reliance on fundraising to support community radio stations**	▪ Fundraising currently comprises one quarter (25%) of all community broadcasting revenues (64% for Specialist Music and 47% for Faith-based broadcasters).
		▪ Fundraising is the second biggest challenge for more than half of all stations (51%) according to the 2022 CBAA Shape of the Sector report.
		▪ Fundraising consultants predict that the largest increase in fundraising will come from planned giving (i.e., bequests), given the intergenerational transfer of wealth from the Baby Boomer generation to their successors.
		   ○ In FY21, RPH Australia received 53% of its revenues from fundraising, largely as a result of a major bequest.
			▪ This is significant for community broadcasting stations because this is one revenue stream which is within their control.
			   ○ The sector itself lacks fundraising capability and capacity, leaving this responsibility solely to stations.
			   ○ A recent CBF strategic plan proposed that it assume a fundraising role but it later determined that role was not compatible with its role in distributing up to $20 in government funding.
			   ○ Various organisations offer fundraising training for broadcasters and the CMAA has been running some multi-station collaborative fundraising programs.
			▪ Beyond developing capability and capacity, fundraising success is difficult to predict as it is highly dependent upon economic conditions
			   ○ It is not feasible to sketch a ten-year economic outlook to inform the Roadmap.

9	**(SOCIAL – 17) Increasing empowerment of people living with disability**	▪ Twenty per cent of Australians live with a disability including sensory, physical, mental and	▪ While the sector prides itself on its commitment to diversity, it has yet to effectively address 'ableism'.

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		- intellectual disabilities, with this per cent set to increase as the population ages. - Government reforms such as the National Disability Insurance Scheme now provide support to help people with disability to live independently and to work. - While the Radio Reading Network has long been a part of the community broadcasting sector and has been funded by the CBF, 'there is little in the way of formal recognition of the needs of people with disabilities whose interest in radio go beyond reading or the interests of those with a print disability', according to PhD research at the University of Queensland. - The same research found that: 'Attitudinal barriers prevented some participants from getting the training and support they needed, even from volunteering at stations in some cases'. 'Many community radio stations are in buildings that are physically difficult to access for people with mobility issues'. - Stations continue to use legacy technology which does not comply with Universal Design principles, rendering it unusable for some people with disabilities. - However, it should be noted that there are challenges and costs associated with making	- As the sector struggles to recruit new volunteers, people with disability could represent a significant new pool of talent. - Community radio stations could offer employment pathways to people with disability who are most likely to be unemployed and least likely to participate in the workforce (45.5%).

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		- station websites, apps and sector representative organisation products accessible that have not been planned or budgeted for in the past. - RPH Australia has recently received $815,000 (over two years) in funding from the Department of Social Services to establish a new disability media entity, covering all forms of disability.	
10	**(SOCIAL – 14) Increasing multicultural diversity in Regional Australia**	- The 2021 Census found that almost half of Australians have a parent born overseas (48.2 per cent) and the national population is drawn from around the globe, with 27.6 per cent reporting a birthplace overseas. - According to the Regional Australia Institute, Regional Australia experienced an inflow of 65,204 people moving from urban areas between 2011 and 2016. This trend accelerated during the 2020–21 Covid-19 pandemic period and was reflected in skyrocketing regional real estate values and rents. - The Department of Home Affairs offers visa concessions to new migrants who settle in regional areas, increasing the multicultural mix of regional cities and towns. - As community radio stations move to fill gaps left in the wake of departing commercial media, they are abandoning block programming for diverse content, crowding out spots previously reserved for non-English language broadcast.	- Increasing multiculturalism is an important issue for the community broadcasting sector, particularly for stations that broadcast programs in languages other than English. - The value of non-English media to the successful settlement of migrants and the provision of important government, public health and emergency messages cannot be understated.

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