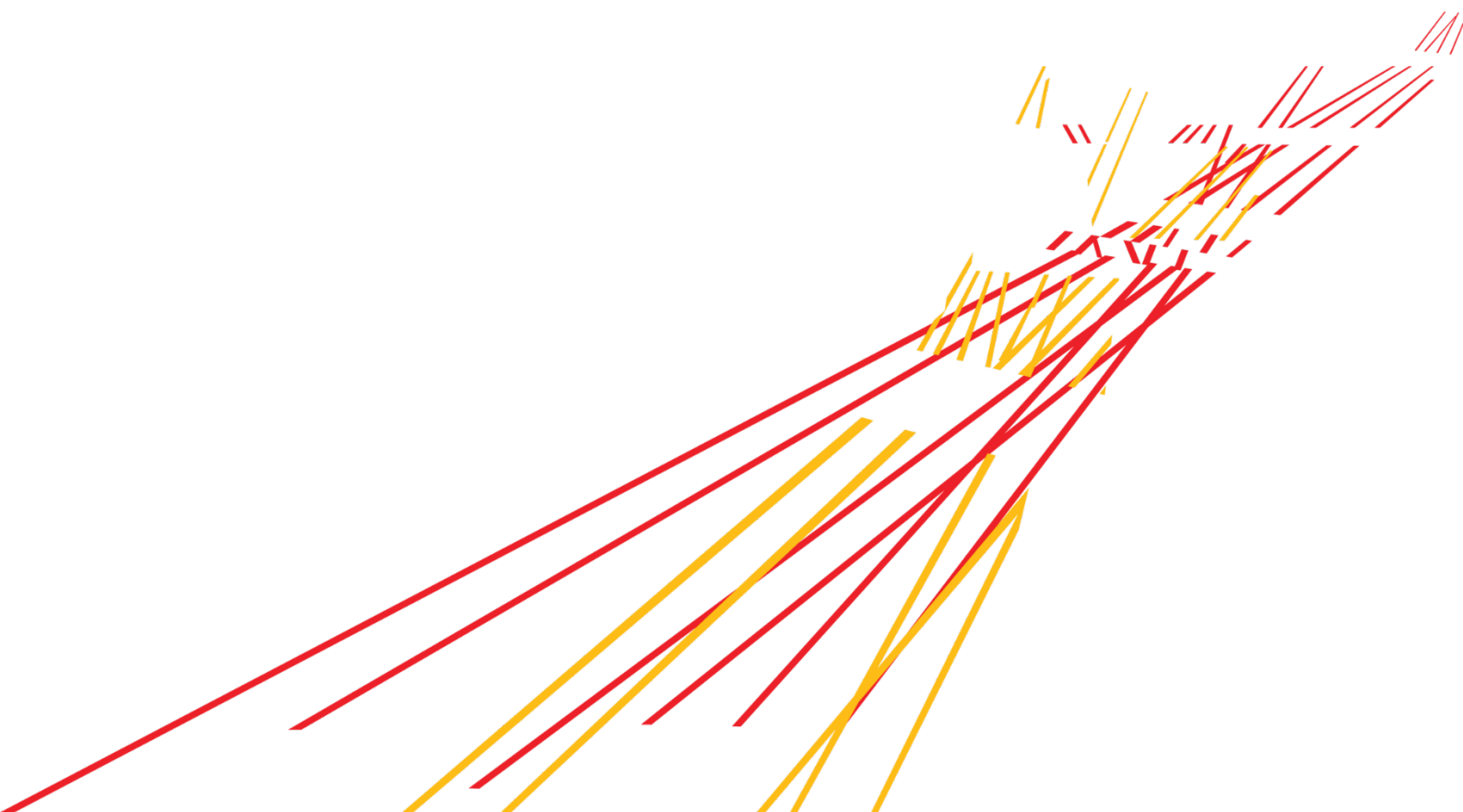


ROADMAP/ 2033/

Discussion Paper

Community Broadcasting in Australia, April 2023



About Roadmap 2033 and this discussion paper

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 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.

The Community Broadcasting Sector Roundtable members and other sector organisations are all participating in the process. Importantly, station representatives will participate in key forums and multiple consultation sessions engaging stations of all sizes and licence types from across Australia.

The first phase of *Roadmap 2033* has been to develop *Discovery Insights*, based on environmental scanning and data analysis, 22 in-depth interviews with leaders inside and outside the community broadcasting sector, and focus groups with 62 representatives from stations and sector organisations. The interviewees were asked to talk about current challenges and share their aspirations for the future. The *Discovery Insights* presents qualitative research as a summary of these conversations, distilled into the top 10 insights into the current challenges and opportunities facing the community broadcasting sector, and the top 10 trends affecting the sector.

This Discussion Paper summarises the over 70-page *Discovery Insights* to inform the sector of the results of the conversations, to prompt discussion and to serve as a basis for individual and small groups of broadcasters and content makers to provide direct feedback, which will be used to develop *Roadmap 2033* and proposals for action in their final form.

Top ten insights

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 remains focused on its purpose – community. Research participants proposed that **the purpose of community broadcasting** has always been clear: to serve ‘their **community interest**’.

First Nations broadcasters can serve as inspiration, as they 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 an Indigenous 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.

Participants suggested changing how stations are classified from the current ‘community interest’ to their ‘**community impact**’. While ACMA’s Community Broadcasting Guidelines set out broad parameters for licence holders to meet in terms of ensuring community participation in the operation of a license, it does not actively encourage stations to articulate or measure how they intend to impact their community 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.

Participants suggested that the community broadcasting sector can deliver myriad outcomes representing **significant value to the public and 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, this raises the issue that the sector is currently **lacking the tools or capability to measure impact** in a systematic and cost-effective way. Still, participants suggested that **impact can be measured in a range of areas**, such as listed above.

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. It was also noted that communities change and community broadcasting organisations need to **constantly evolve** in response.

In terms of purpose and identity, a key recommendation by participants is to change the narrative. Instead of the sector talking about what it lacks and needs and its weaknesses, it is time to **tell a different story**, about the abundance of talent, goodwill and enthusiasm for what community broadcasting is all about and about the sector’s many **strengths and accomplishments**. This narrative is more likely to garner support and strengthen the sector’s long-term sustainability. Some of this **success story** could include:

- Australia's community broadcasting sector is the largest in the developed world.
 - It is composed of over 500 services, operated by 346 license 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 federal 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's respected as a 'pillar of media' along with commercial and public broadcasting.

Participants also proposed that the new '**shared story**' be 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.

Finally, 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.

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. This is an argument for **financially supporting this asset** and a call to ensure community radio's **financial sustainability**.

However, according to some sector observers and participants, **the model of a 'general geographic area' is too general**, and stations lack the capacity and capability to make the underlying business model a success in sub-metro and regional areas. 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, regional and sub-metro general licence holders are increasingly at risk due to **capacity and capability issues**.

Questions were raised about the model of running community radio stations on **volunteer labour**, and about the **traditional sponsorship model** having to compete with online advertising. Radio stations cannot operate where the population is too small to support them. Participants suggested many ways in which the community broadcasting sector can **deliver public value**, and therefore create the argument for more public financial support. It was pointed out that with healthy community broadcasting organisations across the country, efforts to support financial sustainability should be **targeted** to those in need. Others suggested working in **partnership** with bodies including the ABC and the National Emergency Management Agency.

In terms of **revenue**, participants said that **government policy and regulatory settings** have constrained the number and size of revenue streams available to community broadcasters. Still, several research participants offered **ideas for how to maximise revenue**: testing new business models; reforming and strengthening the sponsorship model; modernising the sponsorship model; and developing more capacity and capability to pursue fundraising and philanthropic funding. 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. In the absence of other market-based solutions, the government may find it necessary to deem parts of the community broadcasting sector '**essential services**' if it wants to retain resilient communities in parts of Australia.

In terms of expenses, while community radio stations are adept at stretching resources to meet demand, several participants said that there is a lot of duplication and that more can be done to **collaborate** and take advantage of **economies of scale**. There are **opportunities to collaborate at all levels** including between sectors and sector representative organisations, sector-wide and regionally. But to achieve these efficiencies, the sector will need to be clear-eyed about the **attitudinal and cultural barriers** it is likely to encounter, for example that the strong local character and grassroots nature of the community broadcasting sector makes some long-time broadcasters distrustful of larger organisational structures, and that the specific needs of Indigenous broadcasting groups require collaboration that is specific, tailored and sensitive.

3. Audience and distribution

A key area for insights provided by participants is audience and distribution. To thrive in the coming decade, community broadcasters will need to focus more on 'community' than 'broadcasting'. Many research participants said that 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 Christian broadcasters. The rest of the sector focuses on who is behind the microphone. In order to maximise listenership and not compete with commercial stations, we must know our audiences.

A major 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**. An alternative to costly quantitative **audience measurement surveys** are **qualitative research** and **case studies**. 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 an important social support for women leaving prison. An exciting future prospect is **new wearable technology** that automatically tracks the source and content that audiences listen to.

Participants report that community broadcasters have been needlessly caught up in a **debate over whether size or quality of audience matters the most**. The answer is both. Content must be appealing to attract the audience to serve the station's community interest and the community interest must be representative enough to justify the allocation of spectrum. It is not possible to have content without an audience and vice versa.

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 may be able to access third-party surveys and external studies with which to measure progress.

In terms of distribution, participants repeatedly said, 'it doesn't matter what technology you use to broadcast, it's the technology the audience uses to receive it that matters'. As 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. Participants said that the audience must be able to **find community broadcasting content everywhere**, from analogue AM and FM bands, DAB+ Digital radio and to station websites and apps and social media platforms. And the audience needs to be able to **access it through a single point of contact**, for example, audio, visual and text contact accessed through the same format or device. 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**.

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. 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. It will also be important that First Nations peoples hear from one another through the process of a Voice to Parliament because they are not all decided and will be voting in this year's referendum.

The importance of providing **correct information in appropriate language and cultural terms** was demonstrated during the COVID-19 pandemic. But 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.

It is important to understand that the purpose of participation in First Nations media is often different than elsewhere in the sector. First Nations media organisations 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 a market rate, further entrenching inequality and disadvantage. 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.

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. While Indigenous broadcasting services represent nearly one third of community broadcasting services (150 out of 500), communities still suffer from a **lack of information**, including about the proposed Voice to Parliament, according to some of the Indigenous participants. This finding underscores the importance of using journalism to explain the issues facing our First Nations people.

Participants identified the need to **upgrade and repair** broadcast technology in **remote communities**, and for **training** to equip local Indigenous people to repair critical communications infrastructure, rather than relying on and waiting for fly-in fly-out technicians. 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 spots in communities which do not currently receive any signal at all.

First Nations study participants did not have a unified view on 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 are well-served by the current arrangements and are not confident the First Nations media sector currently has the capacity to administer a separate regime. First Nations Media Australia says that **'more conversations are needed'**.

Non-Indigenous participants expressed overwhelming goodwill toward First Nations Australians and a willingness to support their self-determination in whatever way they could. However, they were equally reluctant to impose their views or assistance on First Nations colleagues unless requested to do so.

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. They 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 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 safe escape from a flood or a water tower is to surviving a drought.

Participants agreed broadly 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.

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 their **role during the emergency event**. Some participants asked, 'Just because they can, should they?' Some said emergency broadcasting is the job of the ABC alone. Others said it depends if 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.

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 communities which have no other media or Indigenous media outlet and other stations 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:

1. Do they have adequate physical infrastructure to operate reliably and safely during a natural disaster?
2. Are they compensated to remain in place while their homes may be caught up in the natural disaster?
3. Is the mental health of staff and volunteers supported after the event?

Some 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.

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 interest to State governments. Several participants 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

As commercial broadcasters retreat from regional areas, Australians who live in these areas 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 do 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 is part of the community infrastructure that supports vibrant and fulfilling lives.

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 diversity in Australia's regional areas. The opportunity is growing as more migrants are incentivised to settle outside of capital cities. 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.

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

Experts said that community radio has a role to play as the '**town square**', as radio is well-suited to deliver local and hyperlocal news because it can be produced more cheaply than television; it's agile and scalable, faster to produce and easily complemented by streaming global and national content.

Several 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 because 'listeners are citizens of the world'.

Unlike **social media posts**, principles of journalism overlay content produced by community radio stations. Facebook groups might be 'hyperlocal' but they don't necessarily produce news. Several participants said that there is a case to be made for deeming paid local journalism an essential service in communities facing a classic market failure. In some parts of the country (e.g. underserved regional areas and remote Indigenous communities), there is no longer the basis for a profitable business, but there is compelling **public interest in information dissemination**, particularly at times of natural disasters and public health crises. It would be unwise to wait for crisis to hit, again, before reinvesting in this critical community infrastructure. While it is always complex for governments to fund media, the needs-based case is straightforward. Participants said there is demonstrable need and no market solution.

7. Volunteering

With changes in Australian society and in volunteerism, 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 trends** most relevant to the community broadcasting sector are:

1. **A decline in formal volunteering, resulting in fewer volunteers overall.** This trend will disproportionately impact direct service organisations, including voluntary emergency services. There are various reasons for this, or younger and First Nations Australians may volunteer but do so informally, or do not call it 'volunteering'.
2. **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. The community broadcasting sector fared better than the average decline of 30%, losing only 17% of its volunteers over the same period.
3. **Australians are living longer and experiencing higher quality of life well into old age.** This means that volunteers are seeking volunteer careers that will make the most of their skills and experience in later life. They are likely to be more demanding, wanting to be engaged and consulted with, and to know their free labour will advance a mission they agree with.
4. Widening income inequality and the rising cost of living increasing makes volunteering increasingly a **'privileged opportunity'**, putting it out of reach of many working Australians. Fewer volunteers will thin social networks and reduce connections to the community.
5. **Volunteers are needed more in regional Australia** but there are fewer of them. Some skills are also 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.

The business model underlying the general geographic license in sub-metro and regional areas relies heavily, perhaps too heavily, on a free volunteer workforce. Therefore, stations, the sector and the government may all need to **recalibrate their expectations of volunteers**. Volunteering Australia says that the organisations that successfully manage their volunteers manage them in the same way that they manage paid staff.

Moreover, 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 have to be had within stations, peak bodies and government about which parts of the sector are so essential they need to be supported by paid staff.

Interesting views were shared on the **age of volunteers**, with worries about a lack of young volunteers. But some long-tenured volunteers said that the fear of ageing volunteers is misplaced and 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. The key task is to manage the **transfer of responsibilities** in an orderly way and increase understanding and cooperation between all generational cohorts using good communication, consultation and, most of all, flexibility.

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.

Providing broadcast training was one of the original policy objectives when community broadcasting was established in the 1970s. Since then, many retired commercial and public radio presenters, programmers and technicians have volunteered their time to train first-time broadcasters, young and old.

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

Participants also reported that **First Nations broadcasters need training**, but the incentives need to change to make it more appealing, particularly to not be linked to unemployment. Increasingly, **peer-to-peer coaching** has been found to be more successful than formal classroom training, including by video. Coaching should **not be limited to individuals** but could be extended to stations on subjects including fundraising.

In terms of innovation, the community broadcasting sector is seen as 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 participants said that the sector should not let go of is its 'lack of polish' and the fact that it is a 'place where we can go to figure things out'.

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.

Participants shared that they did not see technological innovation as driving innovation in the community broadcasting sector. They said that **innovation in audio program content** is an area where community radio has been successful in the past and could be again in future. Community radio has a solid track record in terms of developing innovative program formats. According to one participant, innovative content will be needed to compete with social media for audience attention.

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 organisations.

Community television has recently been given a renewed lease on life by the new federal government and after nearly a decade of licensing uncertainty, community television broadcasters are looking for stability and dedicated funding. While television broadcasters see their future as being online, they need to survive long enough to make the transition from terrestrial to digital. 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. And despite the talk of merging audio and video content, some television broadcasters have reservations, saying it is not yet easy in practice to do so or that they believe the two mediums should be kept separate.

Participants expressed **concern about the terminology used** to describe broadcasting sub-sectors and that it should be updated. As Australia continues to become more culturally diverse, it is appropriate that multilingual broadcasting evolve with it. The term '**ethnic**' is said to 'other' non-English speaking Australians. The most popular alternative was '**multicultural media**' but has reportedly been tried before. Younger people said that they 'despise' the word 'ethnic' and support changing it.

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 at the Community Broadcasting Sector Roundtable. While Christian media is one of the largest and most successful subsectors of Australia's community broadcasting sector, a diversity of faiths needs to be represented.

Virtually every participant in this study said that RPH ('**Radio for the print handicapped**') is a name that is completely out of date. While the Radio Reading Network 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. Representatives of RPH Australia who participated in this study said that they are actively working to create a pan-disability broadcasting organisation with a new name.

All sector peak bodies who participated in this study said that they would like to collaborate more with one another, rather than working in silos. There is scope for **more collaboration across the sector**, for example between Christian, multicultural and First Nations media, where the audience may have multiple affiliations and connections with faiths and cultural communities.

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 pluralism, most people experience it as a monoculture – one station at a time. It is only **at the sector level** that the multifaceted nature of the sector shines through. While a strong emphasis has been placed on demographic diversity, there may be an opportunity to tell a new, fresh story of pluralism in the community broadcasting sector, a story of a community of communities.

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.

However, participants pointed out that the legislative and regulatory framework for community broadcasting is outdated and needs reform, for example, to address the broadcasting regulatory environment related to the internet.

Some of the proposals for reform are to:

- **Classify stations based on proposed community impact, not just community interest.** At present, license holders have the complete freedom to nominate a community interest of their choice. More than half of all licenses are tagged with a 'general geographic area' community interest tag, which as described previously, makes it a challenge to market the station. By contrast, an impact statement would be unique to a particular station, adding clarity to their mission, purpose and business model.
- **Focus on purpose, not participation,** for example, by measuring outcomes linked to a license-holder's plan for community impact, not solely through outputs like the number of volunteers or members and replacing the current complaints-based review system with regular reviews of broadcasters' impact against their intended impact.
- **Expand access to fundraising by simplifying regulation,** for example by working with the Australian Taxation Office and the Australian Charities and Not-for-profits Commission to streamline the deductible gift recipients registration process for community stations.
- **Support the training of more First Nations broadcasters,** for example by offering courses in presenting, production and the maintenance of broadcasting and reception technology.
- **Secure quality information and local news production in areas of need,** for example, by identifying areas that are currently underserved in terms of local news reporting and public interest journalism.
- **Support community radio stations to serve as emergency broadcasters where needed,** for example, by classifying and funding core emergency broadcasting roles in stations located in disaster-prone areas.
- **Protect access to the radiofrequency spectrum for community broadcasters,** for example, by ensuring that community broadcasters are able to access radiofrequency spectrum where there is a demonstrated community need.
- **Regulate online television and radio broadcasting,** for example, by updating the Broadcasting Services Act 1992 to recognise the role that the internet can play in distributing licensed community television and radio content.

Top 10 trends

The development of the *Discovery Insights* involved identifying the most likely and most important trends that have the potential to impact the community broadcasting sector positively or negatively over the next decade. Thirty external trends were identified through a literature scan. The trends were then rated by participants in the first Roadmap 2033 Leadership Forum in two ways. 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. The trends were then ranked accordingly and limited to 10. A summary of the analysis is presented here. More details can be found in the *Discovery Insights*.

Trends in order of ranking

1. Increasing need for localised communications, before, during and after climate-related natural disasters.
2. Greater prominence of and control over stories by and about First Nations peoples.
3. Further media consolidation intensifies 'news media desertification' in regional Australia.
4. Pressure to maintain and grow sponsorship will continue to increase, exacerbating the financial insecurity of stations.
5. Governments shift funding from activities to outcomes.
6. Government support for community broadcasting remains constrained.
7. Ongoing migration from analogue radio to in-dash digital systems in new cars.
8. Increasing reliance on fundraising to support community radio stations.
9. Increasing empowerment of people living with disability.
10. Increasing multicultural diversity in regional Australia.

Analysis of top 10 trends

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 10 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 the ‘pressure to grow and maintain sponsorship’ levels, but recognised this trend provides the opportunity to find new ways to attract sponsorship. They said that if this trend were to materialise, 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 felt equally ‘pessimistic’ about the trend that ‘government support for community broadcasting remains constrained’. Yet some Leadership Forum participants interpreted this 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’. 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 community broadcasting funding represents an excellent return on investment.

Leadership Forum participants were more ‘neutral’ 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 Leadership Forum participants gave the trend, ‘greater prominence of and control over stories by and about First Nations peoples’, the top rating in likelihood and the second highest overall rating. Participants see the next decade as an opportunity for the growth of the First Nations media sector and to strengthen links with non-Indigenous broadcasters. That growth will bring opportunities to increase First Nations peoples’ participation in the wider 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 in the overall top 10. 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 federal 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 10 years of multicultural community broadcasting.

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

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’, came in at 7th place. The ‘increasing media desertification in regional Australia’ came in at number 3 and the predicted shift by governments from funding ‘activities to outcomes’ completed the top 10 overall.