Community Media Matters

An audience study of the Australian community broadcasting sector

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Executive summary

This report presents the results of the first national qualitative research study into Australian community broadcasting audiences. It explores why a significant and increasing number of Australians listen to community radio and/or watch community television, what they value about it, and how it meets their needs. Community broadcasting in Australia began in the early 1970s with the establishment of the first metropolitan community radio stations. Community television is a comparatively recent development dating from the early 1990s. Today, Australian community radio is a mature industry catering to a wide variety of interests. Our study deals with audiences for 'generalist' stations in metropolitan and regional Australia and explores responses from two major interest groups — Indigenous and ethnic communities. Audiences for the nascent community television industry provide a further focus.

The data on which our findings are based has emerged from a series of audience focus groups, interviews with individual listeners/viewers and station managers, and representatives of community groups accessing community radio and television. Our primary findings are detailed in separate chapters in this report, but are outlined in brief below.

For metropolitan and regional radio stations, audience members primarily 'tune in' for these principal reasons:

• They perceive community radio to be accessible and approachable;

• They like the laid back, 'ordinary person' station presentation style;

• They want to access local news and information;

• They want access to specialist and diverse music formats; and

• They appreciate the diversity represented in station programming.

A wide range of audiences access Indigenous radio and television across Australia with both Indigenous and non-Indigenous listeners and viewers identifying the following as key attractions:

• They feel Indigenous media offer an essential service to communities and play a central organising role in community life;

• Indigenous media help people to maintain social networks;

• Indigenous media are playing a strong educative role in communities, particularly for young people;

• They offer an alternative source of news and information about the community which avoids stereotyping of Indigenous people and issues;

• They are helping to break down stereotypes about Indigenous people for the non-Indigenous community, thus playing an important role in cross-cultural dialogue; and

• The stations offer a crucial medium for specialist music and dance.

Audiences listening to specialist ethnic programming on generalist community radio stations or full-time ethnic community radio stations are tuning in because:

• Station programming plays a central role in maintaining culture and language;

• Programs help them to maintain community connections and networks;

• Stations enable them to hear specialist ethnic music unavailable through other media;

• They want to hear local community news and gossip; and

• They want to hear news and information relevant to their lives in Australia, from their home countries, and from neighbouring countries/regions.

Audiences for community television watch because:

•	They want to access alternative programming than that offered by commercial and national public television stations (ABC and SBS);

•	They want to access information that they feel is unavailable anywhere else;

•	They want to receive this information in non-traditional formats;

•	They like the diversity of programming, particularly from niche interest groups; and

•	A significant number of viewers of community television are frustrated by poor or unreliable broadcast signal reception.

While there are different perspectives offered by the various sub-sectors of the Australian community broadcasting industry, a number of key themes have emerged which draw them all together. A common thread running throughout our analysis of community broadcasting audiences is a need and desire for local news and information. Audiences feel they cannot receive localised or community-specific information from any other media sources, although they often access public broadcasters like the ABC and SBS for state or national news, and occasionally, commercial media. Another common theme to emerge, regardless of the sub-sector, is a desire to access and hear diverse music formats. Audiences regularly express either boredom or general dissatisfaction with the narrow range of popular and, usually, international (US and UK) music broadcast particularly on commercial radio. Thirdly, community broadcasters are providing an important 'community connection' role by publicising local events, engaging in community 'gossip', using local people as presenters, and projecting an approachable and accessible front to the community and their listeners. While this theme is less likely to be mentioned by community television audiences, it is prominent in comments from metropolitan/regional generalist, ethnic and Indigenous audiences and thus permeates much of the data. A fourth theme is the sector's ability to present social and cultural diversity in its programming. For many of the participants in this study, this is an important social responsibility function performed by their local community radio stations, in particular, with which they identify and support.

In summary, we conclude that the community broadcasting sector in Australia is fulfilling four broad functions:

•	Providing alternative sources of local news and information;

•	Offering diverse audiences diverse music program formats and styles;

•	Enabling community members to 'connect' — either socially or by engaging with radio programming — thus 'creating communities'; and

•	It more accurately represents Australian social and cultural diversity than other media outlets.

We will investigate these four over-arching functions in more depth throughout this report.

Chapter 1 - Introduction

> It's the local everything… really I think 3CR puts you into the slogan "Think globally, act locally", I really think… that applies across the board. So for people who want to have a voice about what's happening in the community, this is the natural place they would go, to 3CR (Focus Group, 3CR Melbourne, 2005).

This report is the culmination of more than two years' work with the Australian community media sector and their audiences. It is informed by the authors' seven years' research experience with the community radio sector, beginning with a study of managers, workers and volunteers in 1999 and continuing with this qualitative audience study. In this time, we have witnessed an increasing focus on community broadcasting from both the research community and within policy circles.

The increasing attention being paid to Australian community broadcasting is tied to growth in the sector, which, at the time of writing, has 361 radio licenses, 79 Indigenous community television licences, and four permanent community television stations with two additional services (Adelaide and Lismore) operating on Open Narrowcast licences. During 2006-06, an additional 30 temporary community radio licenses were issued (ACMA, 2006a:83-84; ACMA, 2006b:17; CBF, 2005). Based on these figures, the number of community media outlets has trebled since the early 1990s. More than 99 per cent of the permanent community radio stations are broadcasting 24 hours a day, seven days a week (CBOnline, 2006a:1).

The community radio sector in Australia is far bigger than the commercial radio sector which boasts 274 operating licenses. But in terms of resources, as indicated by financial turnover, the comparison reveals a stark contrast — the commercial radio sector annual turnover is currently around $945 million (ACMA, 2006) while the community radio sector operates with total annual revenue of just under $51 million (CBOnline Survey, 2006). Despite this disparity in resources, community radio produces more local content, plays more Australian music, and supports a greater diversity of Australian cultures than its commercial counterparts. As well, it has achieved substantial national audience reach — just over 4 million listeners in an average week, compared to 10.7million for the commercial radio sector, and 7.3 million for the national (ABC/SBS) radio sector (McNair Ingenuity, 2006:30).

It is for these reasons that we offer — for the first time from an audience perspective — an analysis of why community media is succeeding in the current broadcasting environment. Our project has been helped by an increasing level of research in Australia into community radio and television audiences, most notably, the McNair Ingenuity quantitative audience research study which now occurs every second year. This research reveals that community broadcasting audiences have increased from 2004 to 2006 — and that about 47 per cent of the Australian population (around 7 million people) tune in at least monthly to a community radio station. About one in six community radio listeners are 'exclusive' listeners — that is, they do not listen to either commercial radio or ABC/SBS — and their primary reason for listening is to hear local news and local information (McNair Ingenuity, 2006:8). This study both tests and complements the McNair Ingenuity data. In doing so, we attempt to 'explain' the numbers to provide the research and policy communities, and the sector itself, with more detail about 'why' Australians tune in to community radio and television and 'how' they do it.

We have been able to go beyond what has been possible with approaches to industry research thus far (jncluding McNair Ingenuity) in terms of the scope of fieldwork, and have included for the first time community television, ethnic and Indigenous audiences. The ethnic and Indigenous sub-sectors of the community broadcasting industry did not participate in the McNair Ingenuity study, believing that reducing an evaluation of their activities to 'numbers', along with the method adopted (telephone surveys), was an inappropriate way of evaluating their community and cultural contributions. Thus, the data presented in this report is the first to offer specific and qualitative analyses of the sector's ethnic, Indigenous and community television audiences.

This study has been further assisted by the growth in international academic literature examining community media, in no small part urged on by the recent official establishment of the UK community radio sector and an expected sudden growth throughout the country. Based on its 30 years' experience, the Australian community broadcasting industry offers an ideal case study from which its counterparts in Europe and the United States might draw. Our study aims to inform international community media practitioners and researchers of the strengths and weaknesses of the Australian community broadcasting network. It is impossible, though, to report on our findings without placing them in their true context. At the time of writing, the Australian parliament had introduced and passed two pieces of legislation which will have a significant impact on our nation's mediascape in the coming years — changes to media ownership laws and amendments to facilitate the full introduction of digital broadcasting by 2010-2012. We will consider these broader contextual issues before focusing on the project findings in detail.

Assessing the growth of community media

Since our previous study of the community radio sector (Forde, Meadows & Foxwell, 2002b), there has been growing academic attention directed towards community media research. This is evident in a significant increase in numbers of published journal articles, including establishment of the 3CMedia electronic journal (published on the sector's portal, CBOnline — www.cbonline.org.au), book titles, and special journal editions dedicated to community and grassroots media forms (see *Journalism*, Special Issue, 2003; *Transformations*, Special Issue, 2004, Howley 2004; Chitty and Rattichalkalakorn, 2007; and Kidd, Stein & Rodriguez, 2007 [in press]). We note, too, a growth in the number of conferences with a 'community media' theme, alongside an increase in the number of groups seeking membership from community broadcasting activists — the World Association of Community Radio Broadcasters (AMARC), for example, recently established an Asia-Pacific arm and held its inaugural conference in Jakarta, Indonesia, in 2005. The official establishment of the UK community radio sector is another sign that this type of media will attract more attention in the future. Japan's fledgling yet expansive community television industry set up its first peak representative body late in 2006
— further evidence of a growing global interest in media alternatives (Kawakami, 2006). The gathering momentum in Australia suggests this research on community broadcasting audiences is particularly timely.

This rise in community media research — and indeed in community media forms — could be quite simply attributed to increasing globalisation and the need for people to feel 'connected' to their local communities and to the people who create them. Internationally, scholars are beginning to consider seriously the impact of the community media sector within the context of globalisation and its potential impact on local cultures. Howley (2005:30) voices the conclusions of many when he asserts that 'locally orientated, participatory media organisations are at once a response to the encroachment of the global upon the local as well as an assertion of the local cultural identities and socio-political autonomy in the light of these global forces'. The importance of such community-based media is growing within the context of the ever-expanding global media industry. By 2003, ten multinational corporations — including AOL Time-Warner, Disney-ABC, General Electric-NBC, Viacom-CBS, News Corporation, Vivendi, Sony, Bertlelesmann, AT&T, and Liberty Media — controlled most of the production of information and entertainment around the globe. The result, according to Kellner & Durham (2006:xxix), amongst others, is 'less competition and diversity, and more corporate control of newspapers and journalism, television, radio, film and other media of information and entertainment'. It is indicative of the community media sector's importance in a globalised world where the maintenance and representation of local cultures through the media has increasingly become a commercial enterprise rather than a community service. In this media environment, audiences are perceived as 'consumers' rather than 'citizens'.

The dominance of the 'global' in this era plays some part in the increasingly popularity and prevalence of community media. In addition, dissatisfaction with mainstream and particularly, commercial media forms, appears to be playing a significant role — not only because of their increasingly global or international nature, but also because of their continued and persistent need to generate greater profits and to 'thin the product' as a result of this quest for audiences as consumers (Pew Center, 2003; Project for Excellence in Journalism, 2005). Hamilton (2004) cautiously identifies a trend for contemporary media organisations to base primary news decisions and content on economic considerations, leading to a greater emphasis on entertainment news — infotainment — the rise of the celebrity journalist, and an increasing focus on issues of interest to demographic groups targeted by advertisers (Chomsky 1997; McChesney, 2003; Hamilton, 2004). This is occurring alongside trends which show a steady decline in audiences worldwide for mainstream news content (Davis, 1997; Lewis, 2001; Hamilton, 2004; Project for Excellence in Journalism, 2004 & 2005; Deuze 2006). Thus, we attribute the growth in community media and the subsequent increasing attention given to them by the research and policy community to the combined effect of the rise of globalisation and the well-established public dissatisfaction with mainstream media form and content.

Australian media policy, digital frameworks and what they mean for community broadcasting

This study of community broadcasting audiences emerges at a particularly critical point in Australian media history. A perennial issue in Australian media policy has been a debate over ensuring adequate provisions to foster diversity of ownership and content. At the heart of this issue are the needs of regional Australian audiences and, in particular, requirements for local news and information and local content. Two key pieces of legislation passed by Parliament on October 16, 2006, to be enacted in 2007 — the *Broadcasting Services Amendment (Media ownership) Act 2006* and the *Broadcasting Legislation Amendment (Digital Television) Act 2006* — represent significant changes to the Australian media policy environment. The *Broadcasting Services Amendment (Media Ownership) Act 2006* has relaxed existing cross-media and foreign ownership laws, allowing major media owners to own different media formats (e.g. radio and newspapers; television and radio) in the same media market, and for foreign investors to own more than 15 per cent of an Australian media enterprise. At the same time, the amendments have employed some safeguards to retain diversity and to ensure the needs of regional Australia are met by commercial broadcasters, including a requirement that at least five independent media groups remain in State capitals and four in regional markets, and that any merger may involve no more than two of the three regulated platforms (i.e. radio, television and the press) in any one license area. The assumption is that the number of media owners in both metropolitan and regional Australia will decrease when the changes take effect (Gardiner-Garden & Chowns, 2006).

Alongside the relaxation in cross-media ownership and foreign ownership restrictions are increased roles for both the Australian Competition and Consumer Commission (ACCC) and the Australian Communications and Media Authority (ACMA) in ensuring compliance with competition regulations and local content provisions. In relation to regional areas, the legislation specifically requires minimum levels of local content on regional commercial television, a minimum level of local content on regional radio (4.5 hours) — currently subject to review (a proposal to incorporate 12.5 minutes of news is also under consideration) — and special rules pertaining to 'trigger events' such as changes of ownership in regional areas which aim to ensure continued local content (DCITA, 2006). While the government has argued that information diversity will not decrease under the new laws — primarily because of increasing diversity offered by online and digitized media services — there are concerns that a a further concentration of media in fewer hands will have a significant impact on the boundaries of public debate and discussion (Manne, 2006). Following the announcement that Parliament had passed the new laws, major Australian media proprietors — including the Packer-owned Publishing and Broadcasting Limited, Kerry Stokes' Channel 7 group and the Southern Cross group — immediately initiated moves to re-organise their ownership portfolios. The prospect of increasing concentration of ownership in the mainstream media sector both nationally and globally suggests an even greater role for localised and independently-run broadcasting services typified by those in the community broadcasting sector.

The second piece of media legislation with implications for the broader Australian media environment enacted by the Australian Government is the *Broadcasting Services Amendment (Digital Television) Act 2006*. This Act is primarily concerned with existing free-to-air commercial stations and arrangements for conversion to digital and multichannelling. It heralds another step towards a digital future and has strong implications, particularly for the community television sector. According to its proponents, the impact of digitisation and convergence on the Australian media environment will transform it. The Minister for Communication, Information Technology and the Arts, Senator Helen Coonan, in an address to the Country Press Association Annual Conference (2006) shared her enthusiasm for this shift:

> The pace of change in all of the industries involved in my portfolios is breathtaking. In telecommunications, ICT and the media, the constant evolution of technology means content can be delivered in all manner of ways to all manner of devices anywhere you want it, anytime you want it. This is the reality of the new consumer, the 21st century consumer. News and entertainment are always on, always available whether it is on the TV, over the phone or on the computer.

However, it is unclear and by no means conclusive that Australian audiences are enthused or eager for digital services. Some indication of this is the rescheduling of conversion to digital from 2008 to 2010-12. This has occurred in other countries too — the UK, United States, Ireland and The Netherlands have also put back their conversion dates (Commonwealth of Australia, 2006:6). The ACMA survey, *Digital Media in Australian Homes* (2005) found low levels of awareness of digital television. More than 16 per cent of surveyed households that had not taken up free-to-air digital television had not heard of it, more than 28 per cent had heard of it but did not know if it was available in their area, and 38 per cent of all surveyed households did not know that analogue services would eventually be switched off. The ACMA survey further reported that almost 42 per cent of households surveyed were not interested in digital television. While these figures are from 2005 and the digital take-up has gained some momentum since then, audiences still appear to be in no great hurry to acquire access to the digital spectrum. They also seem reluctant to spend time watching more television or accessing this through mobile phones — despite prophetic announcements about the desirability of the technology and its additional services.

Ready Get Set, Go Digital — A Digital Action Plan for Australia (Commonwealth of Australia, 2006) deems that the entire community media sector will face the emergence of a digital future which presents both hurdles and possibilities for new services, especially in regional Australia. In February 2007, the community television sector was still awaiting a firm commitment from government on the arrangements for the transition from analogue to digital — particularly relating to capital expenditure required for digital technology. The House of Representatives Standing Committee on Communications, Information Technology and the Arts inquiry into community broadcasting has recommended that the Federal Government support the transformation when the analogue spectrum is switched off in 2012. However, the existing situation with CTV channels being excluded from the digital spectrum has yet to be formally addressed (2007: xi). Despite the sector's optimism that the government's Digital Action Plan would enable the sector to simulcast in both analogue and digital formats until the digital switchover in 2012, the plan — released in November — appears to encourage the sector to either 'strike a deal' with an existing digital platform carrier or failing that, to change the sector's analogue signal to a digital one. At the time of writing, and despite considerable lobbying, no firm commitment from the Federal Government to fund CTV's change to digital or to provide an additional digital channel to the sector for multi-channelling has been forthcoming (Kelly, 2006:5; Commonwealth of Australia 2006:21).

The digital switchover to radio seems more straightforward, particularly as radio audiences seem even more reluctant to take up digital radio signals. Community radio stations, at this stage, are not being greatly disadvantaged by their lack of a digital signal. And in contrast to digital television, digital radio is not expected to fully replace the analogue services — they will operate alongside each other, with digital radio acting as a supplement, rather than as a replacement for, the current analogue services (Coonan, 2005):

> International experience shows that digital radio will supplement existing analogue radio services for a considerable period, and may never be a complete replacement. Accordingly, the Government's framework has been built around digital radio being a supplement to existing services in Australia rather a replacement technology, as it is in television.

The revised media laws — both in terms of cross-media ownership and digitisation — are, according to the Federal Government, necessary to accommodate the convergence in media platforms enabled by digitisation.

Within the context of these changes — both current and proposed — we have canvassed in detail the thoughts and opinions of a sample of Australia's diverse community broadcasting audiences. Our analysis offers a contrast to prevailing rhetoric. While commercial media proprietors, preparing for the relaxation in ownership laws, jostle for position to be the first, most profitable and/or biggest on the Australian media block (Knight, 2006), audiences for community radio and television maintain their enthusiasm for local content relevant to local communities. The imminent reduction in the number of media owners suggest that the services offered by community broadcasting are entering a new age of importance.

Analysing community media audiences

While there has been an increase in research into community media, there is still much to be completed. This is especially the case for community broadcasting audience research. To date, the majority of research projects have focused on the production of community media rather than its reception. Downing (2003:625) notes the lack of attention to the user dimension:

> … Given that alternative media activists represent in a sense the most active segment of the so-called 'active audience'… One would imagine that they above all would be passionately concerned with how their own media products are being received and used.

The community broadcasting sector's lack of resources has been readily identified as one of the primary reasons why it has been unable to undertake substantial audience research without government support (Forde, Meadows, & Foxwell, 2002). Policymakers have recognised the need for more data on the sector to help determine their own funding and planning priorities and as a result, have offered financial assistance for recent quantitative audience research — the 2004 and 2006 McNair Ingenuity projects are the prime examples. In the interest of exploring the nature of ethnic and Indigenous audiences in particular, the Federal Department of Communications, Information Technology and the Arts provided funding through the Community Broadcasting Foundation to assist with the completion of this project. Funded primarily by the Australian Research Council, the project received in-kind support from a wide range of community broadcasting sector organisations, detailed in Appendix D. The research evolved through a cooperative process, managed by the Qualitative Audience Research Advisory Committee (QARAC), made up of representatives from across the industry and the project research team. This enabled us to develop and apply a series of reliable qualitative audience research methods in order to produce the findings presented in this report. The research methodologies and theoretical frameworks we have used throughout this study are detailed in subsequent chapters. We have endeavoured to present our findings in a language and context which is useful to the sector, but which also enables national and international research communities to access and utilize the data. One of the primary outcomes of this project has been the development of a practical, economical and accessible audience research method which we hope will be of use to both the sector and other researchers attempting to conduct similar or allied studies. This will be made publicly available through the sector's web portal, CBOnline.

Chapter 2 of this report outlines the background issues and theory which offer a current and international framework for this study. We had to not only grapple with the suitability of an entirely qualitative research framework, but also to consider current theoretical ideas around community media to contextualise the data we gathered from Australian community broadcasting audiences. Were local news content and current affairs services, for example, most important to audiences, suggesting the predominance of a 'public sphere' service being offered by community broadcasters? Were audiences tuning in more because of the organic, grassroots, or alternative nature of community radio and television, suggesting ideas of 'alternative media' might be more relevant? While academically-oriented, this chapter provides an overview of the issues we had to consider in carrying out this study.

Chapter 3 outlines our research methodology and the process of its development in consultation with our advisory committee and relevant scholarly literature. It was an important objective that the study generates a portable and use-able research method for future community broadcasting audience studies, and the methodology was designed with this outcome in mind.

Chapter 4 begins the presentation of the study's findings, with results from the largest component of our project, metropolitan and regional community radio stations. This reports on the data gathered from 25 participating station focus

groups around Australia. Coupled with this data are comments from community group representatives also involved in community radio. Analysis of these interviews provides greater insight into the audience focus group data.

Chapter 5 focuses specifically on Indigenous audiences encountered by our researchers over the project's span of more than two years. Chief Investigator Associate Professor Michael Meadows worked primarily with Indigenous researcher Derek Flucker to access Indigenous audiences in metropolitan, regional and remote areas, with assistance early in the project provided by Indigenous researcher Christine Morris. The sample was drawn from a broad range of Indigenous communities following consultation primarily with the peak industry media organisation, the Australian Indigenous Communication Association (AICA). It included eight focus groups and additional on-the-ground interviews with listeners and viewers in an additional 12 regions around the country. Although our 'generalist' metropolitan and regional station sample included more audience focus groups (25), the nature of our Indigenous fieldwork — detailed further in Chapters 3 and 5 — meant many one-on-one interviews were conducted, generating hundreds of hours of interviews and travel to remote, regional and urban areas.

Chapter 6 concerns ethnic community radio and reports on the 10 focus groups completed with audience members from a range of established and emerging ethnic communities. The cooperation and advice from the leading ethnic broadcasting sector body, the National Ethnic and Multicultural Broadcasters' Council (NEMBC), made a vital contribution in determining sampling for this component of the study. While additional and subsequent translation issues had to be considered in both the Indigenous and ethnic community fieldwork, the results from these two elements of our project have provided useful new data which past researchers generally have found difficult to access.

Chapter 7 reports on the findings from the community television fieldwork, and again provides important data, particularly in light of the issues discussed previously in this chapter regarding the impact of the digital switchover. Indeed, this was a topic of great discussion at the recent Community Broadcasting Association of Australia's 2006 annual conference as the CTV sector feels its potential audience reach is suffering greatly from its inability to currently access the digital spectrum. Perhaps the most interesting data to emerge from our CTV fieldwork was the subtly different ways that community television audiences 'see' their local community television station — it provides a contrast to the sense of ownership that community radio audiences see as inherent in the way they engage with local stations and their programming.

Chapter 8 provides a summary of project findings, and suggests pathways to the future for the sector. It also offers some commentary on community audience research futures.

For those particularly interested in our research methods, we have provided a series of Appendices at the completion of this report — a fieldwork schedule with a full list of the stations and organisations who participated in the study; a series of interview questions for community group representatives who ran programs on community radio; and questions which guided focus group discussions with each of the sub-sector audiences.

The Chief Investigators on this project, all from Griffith University in Brisbane, welcome comments and questions from sector representatives or fellow researchers, and can be contacted by email: Associate Professor Michael Meadows, m.meadows@griffith.edu.au Dr Susan Forde, s.forde@griffith.edu.au Dr Jacqui Ewart, j.ewart@Griffith.edu.au Dr Kerrie Foxwell, k.foxwell@griffith.edu.au It is our hope that this report will continue to be of interest and use to the sector in the coming years and that it will help others to identify Australia as an international leader, not only as a proponent of innovative forms of community radio and television, but also in terms of its contribution to the examination and analysis of these forms of media.