

Mobilising the Community Radio Audience

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Abstract

In 2004 the first, national, statistically robust, quantitative assessment of the Australian community broadcasting sector's audience reach was undertaken. Conducted by McNair Ingenuity, this research provided a major breakthrough in the wider shift to a more audience-centred approach to managing the sector. The findings, significance and implications of this research are considered here. Following recent developments in critical cultural policy studies, this paper locates this renewed concern for community broadcasting audiences within a 'larger cycle of decision-making' (O'Regan, Balnaves and Sternberg 2002: 2). The particular influence of developments such as the emerging spectrum market and the imminent transition to digital transmission systems is discussed. These developments are important to understanding why community broadcasting resistance to market-based conceptions of audience is being overcome, and how audience-centredness might be used to facilitate the continuing development of this 'third' sector of Australian broadcasting.

Audience research in Australian community broadcasting

Throughout its 30 year history various attempts have been made to systematise knowledge of community broadcasting audiences. Some of these initiatives have been centrally coordinated while others come from individual stations or groups of stations (for example Market Equity 2001; El-Ghul in this issue). The reasons for conducting audience research have varied from profile-raising and political lobbying, to improving revenue streams from paid sponsorship. So although quantitative market research methods are not foreign to the sector, there remains a persistent absence of substantial, quantitative data that can be used to assess, for example, the market value of community broadcasting air time and licences. This situation changed abruptly in 2004 when McNair Ingenuity was commissioned to establish the reach and audience profile of community broadcasting in Australia. Following the widely shared view in media and communication studies that audiences are constructed by media institutions, researchers and governments for particular reasons (for example Hartley 2002: 11; Turnbull 2002: 85ff), this development begs the question, 'why now'? Why would a sector that was established and institutionalised in discourses of media citizenship and diversity now require market legitimisation?

An understanding of how community broadcasting is presently figuring in spectrum management and digital transmission public policy debates helps to provide an answer to this question. Also relevant are the research collaborations that have been sponsored by key governing agencies of the sector, notably the Department of Communications, Information Technology and the Arts (DCITA), the Community Broadcasting Foundation (CBF) and the Community Broadcasting Association of Australia (CBAA). In exploring the 'why now' question it also becomes clear that the effect of market discourse is to make the sector more 'audience-minded'. The extent to which this development weakens or displaces the media citizenship project ultimately depends upon the outcomes of changed spectrum management arrangements for the sector on one hand and, on the other, what stations and the sector as a whole choose to do with market-based research. Audience-minded research has strategic and practical value in developing and strengthening the capacity of the sector to support media citizenship.

The historical resistance of the sector to quantitative audience research is explained by a number of philosophical and practical factors. It has been argued that the diversity of the sector is not readily captured or easily represented by quantitative ways of knowing audiences which are, by definition, reductive and goal-oriented (for example Forde, Meadows, and Foxwell, 2002; and Meadows et. al in this issue). Hence, qualitative methods and approaches have been more widely used to develop empathetic understandings of the variety of needs, practices and communicative protocols of community broadcasting. Qualitative approaches have also tended to be more accessible, useful and affordable to researching this process-oriented sector which aims, in the broadest sense, to facilitate story-telling and making (not just listening – see Notley and Tacchi in this issue) by the widest possible constituency.

Indeed, the sector deliberately complicates the social relations that are associated with conventional broadcast media. Rather than fixing and opposing the interests of media citizens and consumers to those of media producers, community broadcasting users are imagined in a variety of ways: as participants, as volunteers, as program makers and as listeners. This disruption has been variously described as media citizenship, alternative media and radical media (Rennie 2002). These ways of thinking about community broadcasting and its audiences do not necessarily oppose the sector to government, economy, or ‘mainstream’ media. In Australia the so-called ‘third’ sector of community broadcasting has a pluralist purpose. It is meant to complement commercial and national broadcasting sectors by adding new practical possibilities and dimensions of meaning to media access, participation and representation, although oppositional politics can also clearly find a niche within the sector (see Anderson in this issue). Although they are important to the sector they also have a strategic public policy value for different reasons. In the last decade or so, spurred on by the windfalls from spectrum access auctions in mobile telephony and commercial radio in particular, public policy agents have also become interested in using audiences as a way of ascertaining the social and economic benefits of broadcasting spectrum management. In this context the lack of market knowledge of community broadcasting has been identified as a major weakness (see the evaluation of Productivity Commission commentary on community broadcasting which follows). As the sources of revenue available to governments have diminished over the past quarter century, the meaning of governing in the ‘public interest’ has changed. Simultaneously, new digital media literacies, platforms and practices for media citizenship are being developed and the legitimacy of spectrum provisions for community broadcasting is coming under increased scrutiny.

McNair Ingenuity Research

Designing the survey

The opportunity to redress the dearth of quantitative data on the community radio audience arose in early 2003 when DCITA offered a one-off financial grant to conduct a national listener survey. The CBF contracted management of the project to the CBAA, the peak body representing most community broadcasting stations. The CBF also sought consultation with stakeholders through the Audience Research Advisory Committee (ARAC) comprising representatives from DCITA, CBF, CBAA, Radio for Print Handicapped Australia and the indigenous broadcasting sector.

McNair Ingenuity was awarded the contract to conduct the survey after a public tender process. ARAC believed that McNair Ingenuity’s wealth of experience in designing and conducting radio surveys would ensure that the project would yield results which were rigorous and robust, and would stand up to the critical scrutiny they was certain to

provoke. A fully accredited market and social research organization in Australia, audited and accredited by Interviewer Quality Control Australia (IQCA), McNair Ingenuity had the credibility and reputation that the sector was looking for. The research team was led by Ian McNair, who is widely recognised as a leading social and media researcher. The McNair Surveys were amongst the earliest radio audience surveys established in Australia, dating back to the 1930s. Technical expertise in designing the survey was also provided by the Communications Research Unit (CRU) of DCITA.

The survey ascertained the *reach* of community broadcasting and updated the audience *profile*. *Reach* is a measure of the number or percentage of individuals or households exposed to a program, ad or channel (in this case local community broadcasting stations) within a particular time frame (a typical week or month). *Profile* is the particular demographic composition of the audience for a particular program or channel (in this case local community broadcasting stations).

The survey was conducted by telephone between March and May 2004 by means of a Computer Assisted Telephone Interviewing (CATT) system. A total of 5,014 people aged 15 and over were surveyed across Australia. Quotas were used to ensure a representative spread of men, women and age groups. Sample sizes were drawn from the metropolitan and non-metropolitan areas of each state so that statistically viable aggregate results could be gleaned for every city, state and non-metropolitan area in Australia. One of the important features of the survey design is that by commissioning relatively inexpensive 'booster' surveys individual stations can generate quite a bit more information about their local market reach and audience profile (McNair, 2004).

Assessing the results

In summary, the survey found that community radio has a significant audience reach. It also legitimated reach, as distinct from ratings, as a measure of community broadcasting's influence in the Australian media ecology. The survey also revealed a strong alignment between the policy objectives for the sector and audience motivations for listening. For example, localism factors were cited as the main reason for listening in non-metropolitan areas whereas diversity factors were given as the main reasons for listening in metropolitan areas. (See also Collingwood in this issue for a discussion of the politics of localism in Australian broadcasting.)

Survey findings (McNair Ingenuity Research 2004) clearly demonstrate that community radio in Australia has an audience which is large, diverse and engaged. The survey found that more than 7 million Australians – or 45% of people aged over 15 – listen to community radio in a typical month. 3.7 million Australians – or 24% of people aged over 15 – listen to community radio in a typical week.

The survey also identified those who listen to community radio exclusively, that is, who do not listen to commercial radio or ABC/SBS. It found 685,000 exclusive listeners in an average week. In fact, exclusive listeners account for nearly 1 in 5 of the entire community radio audience. This demonstrates a strong degree of loyalty and engagement from a significant proportion of community radio listeners.

Listeners to community radio on average spend 7.7 hours listening to community radio per week. Older people aged 55 and over listen the most to community radio, averaging over 12 hours per week. Non-metropolitan listeners are also likely to listen to community

radio for longer, with the time spent listening averaging 8.8 hours per week compared to 7.1 hours per week in metropolitan areas.

According to the survey, the most common reason for listening to community radio is because it provides diversity in programming, with a range of specialist music and information programs. This was the main reason given by both men and women, in all age groups and all occupation categories. In fact, nearly half of all community radio listeners provided this response. It demonstrates conclusively that the sector's greatest strength is its ability to cater to niche audiences whose listening needs are not met elsewhere on the dial.

The survey paints an encouraging picture of listening habits in rural and regional areas, where one quarter of the population aged 15 years and over - 1.4 million Australians - tune in to community radio each week. For these listeners, the provision of local news and information was the most frequently cited reason for listening to community radio. Given that more than 35 per cent of rural and regional community stations are the only radio service in their area or the only service producing local content, the importance of local content to these listeners is not surprising (CBD 2004).

Community radio listening varies by State, with the Northern Territory having the most listeners in an average week per head of population (42%), followed by South Australia (30%) and then Western Australia (29%). Darwin has the largest community radio listenership of any city (45%), followed by Perth (36%) and then Adelaide (31%). The strength of community radio in these cities can perhaps be attributed to perceptions that the mainstream media is concentrated in Sydney and Melbourne and therefore less attuned to the local issues.

The survey found that community radio draws its audience from a wide cross section of the community, with at least 20 per cent of most demographic groups tuning to community radio during a typical week. The diversity of the sector's programming seems to facilitate its reach to all sections of the Australian population.

In terms of the overall demographic composition of the weekly community radio audience, 53 per cent are men and 47 per cent are women, 19 per cent are aged 15 to 24, 26 per cent are aged 25 to 39 and 55 per cent are aged 40 and over. 45 per cent of listeners are engaged in full-time work and 19 per cent in part-time work. Over one-quarter of all full-time workers listen to community radio in a typical week. Students are also likely listeners with over one-quarter listening in a typical week. People who are unemployed, retired or doing home duties are less likely to listen to community radio, with 1 in 5 tuning in over a typical week.

Community radio listeners tend to be in professional and managerial roles (1 in 4); however 18 per cent work in white collar roles and 17 per cent in blue collar occupations. Community radio listeners' income is marginally higher than for the overall Australian population. Compared to the average annual gross income for all Australians aged 15 year and over (\$36,600), community radio listeners in an average week earn marginally more (\$37,700). The breadth of these results demonstrates that there is no 'typical' community radio listener, and the diversity of the community radio audience reflects that of the general population.

Commercial radio response to the Survey

Predictably, the survey results also drew claims of disbelief from the commercial radio sector. Commercial Radio Australia CEO Joan Warner made comparisons to the results drawn by the Nielsen radio ratings:

There is absolutely no way there are that many people listening to community radio. The general results we've had over the past 10 years is about 11 or 12 per cent fall into the 'other' category of listening (Knight 2004).

The community broadcasting sector's response was to point out the limitations of the 'diary method' employed by Nielsen Media Research as an accurate measure of the community radio listenership. Nielsen surveys obtain their information through the use of diaries which list only the subscribing commercial and ABC stations that are in each market. There is no 'prompt' for community radio stations, which has long caused the community radio sector to claim that the Nielsen surveys under-represent the community radio audience. Community radio listenership is relegated to the 'other AM/FM' category in the diary, along with SBS and narrowcasters. The McNair survey, on the other hand, listed by name every community radio station in the respondent's area. The community broadcasting sector therefore claimed that the McNair survey was a more reliable gauge of the extent of the community radio listenership.¹

Cultural policy and community broadcasting

Community radio is by no means the first cultural sector to rise to the challenges of the neo-liberal shift in the meaning of 'public interest' to not-for-profit and cultural sectors. For over a decade arts organisations have been compelled to become more 'audience-minded' (O'Regan 2002, p. 104), to professionalise arts administration, and to take on a 'services orientation' (p. 107) in which audiences and publics are thought of 'in the same way as ... the commercial cultural industries: as significantly internally differentiated and segmented' (p. 108). This has come about in response to a 'larger cycle of decision-making' (O'Regan and Balnaves 2002, p.2) in which Australian critical communications researchers engaged pragmatically with industry and government to consider cultural industries development strategies and, in doing so, applied concepts developed elsewhere in new and distinctive ways (Flew 2004, p.38). Important adaptations were made to a range of market research methods so that they could serve the arts as robust management and advocacy tools by generating reliable data about arts participation, consumption and cultural citizenship. Without the positive attention that these assessments generated, 'it is doubtful that the subsidised cultural sector would have been able to maintain its position on governmental horizons in an era of cost-cutting, corporate downsizing and microeconomic reform' (O'Regan 2002, p.106).

National public broadcasting, ethnic and multilingual broadcasting and indigenous media (for example Hawkins 2001, Lawe Davies 2002, Meadows 2002) have all been treated as cultural policy objects throughout this period. Critical cultural policy research has generated important insights into ways of life in Australia, if not strategic policy advantages at various times for these organisations. The general, sector-wide audience research initiatives considered here and elsewhere in this issue of 3CMedia, probably cannot be accurately characterised as community broadcasting's own cultural policy 'moment' (Flew 2004, p. 38ff) because they do not share the same coordinated or

¹ A comprehensive collection of media coverage of the McNair Ingenuity research is available for further analysis at www.cbonline.org.au/indexd54ahtml?pageId=44,135,2,0

systematic intent that underpinned earlier empirical mapping initiatives in other parts of the cultural policy field (see for example Mercer and Grogan 1995; and Bennett, Emmison and Frow 1999). There are nevertheless many commonalities. The fact that community broadcasting has only begun to deploy cultural policy techniques relatively recently when compared to the rest of the cultural policy field, might be for a number of reasons including the fact that stakes in the future of this sector have never been higher.

Where the Australia Council was key in fostering audience-mindedness in arts organisations (O'Regan 2002 p.104) DCITA has facilitated this for community broadcasting. It has been involved in all major research initiatives in the sector (for example in an advisory capacity and/or as a funding source). DCITA bureaucrats have worked closely with peak sector organisations including the Community Broadcasting Foundation (CBF) which distributes approximately \$5.5 million of annual government funding to the sector.² In addition to the McNair Ingenuity research discussed above, DCITA is also collaborating with sector agencies in a major research partnership with a Griffith University academic team to produce significant data on community broadcasting inputs. This has recently been renewed to undertake qualitative research on the demand side (see Meadows et. al. in this issue). Station-generated data on both inputs and audiences is also being consolidated in the Community Broadcasting Database, which will be discussed shortly.

This paper now considers the two intersecting trajectories of policy-making that are reshaping the context in which community broadcasting services operate, and frame the rise of audience-mindedness in this sector. The first is spectrum management arrangements and the second is the digitisation.

Spectrum politics

But for free³ spectrum access, the Australian community broadcasting sector would not be as well-developed as it is. While analogue spectrum access for community broadcasting is likely to remain free for the time being it cannot be assumed that this arrangement will continue when radio begins the process of converting to digital transmission systems and spectrum. This is because spectrum management principles have been subject to various processes of revision and review that now span more than two decades, and which could result in a shift from government to market-based spectrum management arrangements. While a timeframe has been established for the rollout of digital television, transition arrangements have not yet been settled for radio. Although it has been very slow to develop, it is nevertheless probable that a policy commitment and timetable for adoption of digital transmission of radio will eventually be settled.

The Productivity Commission first commented upon the impact of the spectrum reform agenda upon community broadcasting in its *Broadcasting Inquiry Report* (2000, Chapter 6). The Productivity Commission is the Australian Government's main advisory body on microeconomic reform and regulation and reports directly to the Treasurer. It found that the *quid pro quo* approach to managing broadcasting spectrum no longer coincided with the wider public interest in the best economic return possible on spectrum. It argued that the public benefits accruing from a limited number of analogue incumbents, for example, Australian content in commercial television or local access to community broadcasting,

² This amount was increased by over \$2m per annum for the next four years following the release of the McNair Ingenuity research findings (see concluding discussion on the uses of the research).

³ Spectrum access is free but access to transmission sites can be costly (see Sice 2004).

could be achieved more transparently through direct government subsidy of competitive broadcasting and non-broadcasting suppliers than broadcast licence conditions. In the Commission's view present arrangements act as a brake upon the number of broadcasting services in operation and unnecessarily restrict consumer choice. Greater public benefit could be achieved from a market in broadcasting spectrum. This would force incumbent licensees to pay competitive prices for spectrum access rights, just like new spectrum users (for example new commercial FM radio licensees and mobile telephone carriers). Alternatively, it would require governments to be more forthright about the full value of government subsidies to national and community broadcasters. This recommendation was not implemented for television, in part because key political decisions about the principles for allocating digital broadcasting spectrum had been made prior to the Productivity Commission Broadcasting Inquiry.

In the case of community broadcasting, the Productivity Commission formed the view that because they receive 'free' spectrum community broadcasters 'exclude other broadcasters' (275). It recommended that the opportunity costs of community broadcasting spectrum be the subject of annual reporting. It also recommended that the Australian Broadcasting Authority conduct regular research on the demand for community broadcasting services and undertake a more detailed analysis of the social benefits and costs of community broadcasting (276). The implications of the Productivity Commission's findings for community broadcasting were potentially stark. Unless the sector developed the wherewithal to pay market rates for digital spectrum, or unless Australian governments committed to subsidising spectrum access costs, there would be no future for this sector in a digital broadcasting spectrum market. Community broadcasting would need to migrate to alternative delivery platforms, for example the Internet.

The Commission's position on community broadcasting and other not-for-profit spectrum users had not softened by the time of its 2002 *Radiocommunications Inquiry Report* although it did appear to concede the political limits of its preferred reform agenda, and the likely interest of government in maintaining a mixed spectrum economy:

The major advantage of the explicit funding approach is that it makes apparent the opportunity cost of national and community broadcasters' spectrum use....However given the government's commitment to national and community broadcasters (that is, it is likely to purchase the spectrum regardless of the cost) it may be administratively simpler to reserve spectrum for services (Productivity Commission 2002, 240).

Nevertheless, bureaucracies with policy responsibility for community broadcasting are now insisting upon greater demand-side accountability. Minor but important changes were made to the community broadcasting licence renewal process in 2002. Rendered little more than a postcard renewal process in the deregulatory mood of a decade earlier, the 2002 amendments re-introduced flexibility to community broadcasting licence procedures in relation to the matters the Australian Broadcasting Authority can take into account at the time of licence renewal (ABA undated). A licensee's knowledge of local demand for information and entertainment programming became one of the matters the ABA could consider. This introduced the expectation that community licensees would develop and maintain a degree of audience-mindedness that previous licence renewal processes did not require.

Digitisation

In general, broadcasters have been reluctant to embrace digital transmission systems but digitisation of most other parts of the broadcasting value chain occurred quite rapidly in the 1990s. The impact of digitisation in production, post-production and communications systems, as well as storage media, has been well documented (for example McQuire 1997). However in the community broadcasting sector digitisation up to the point of transmission has been an extremely uneven process mainly due to resource constraints. The fact that so many community stations remain on the wrong side of the so-called digital divide has not been lost on national governments committed to an information economy and seeking spectrum efficiency gains. The policy appeal of the idea that community broadcasters should re-locate to the Internet to practice media citizenship is predicated on various untested assumptions about the accessibility digital media and digital media literacy amongst sector participants (for an international perspective on digital media literacy and the digital divide, see Tacchi in this issues). It also overlooks the importance of community broadcasting as an 'innovation commons' (Rennie and Young 2004). Certainly some highly digitally literate community broadcasters, frustrated by the lack of progress on community television policy, left the sector to pursue very successful Internet-based open source publishing initiatives including IndyMedia (Rennie 2003). It nevertheless remains the case that digitisation and digital media literacy have only really come into focus as community broadcasting policy objects since the mid-1990s. The results of centrally coordinated and funded initiatives have been mixed and remain largely under-researched.

As part of its 1996 'Better Communications' election platform the Coalition Howard government made a number of one-off funding commitments including one that aimed to connect the sector to the Internet. The Community Access Network and Community Broadcasting Database (CAN/CBD) were two initiatives from this period. The CAN aimed to place one Internet-ready computer in every fully licensed station and support for ISP charges for an initial period. The initiative was controversial for a range of reasons but mainly because funding was inadequate. This meant that training was limited and that various groups of licensees were excluded from the scheme including, for example, stations in remote Aboriginal communities. There is nevertheless evidence that Internet access and the CAN dramatically altered and improved program-making practices once volunteers obtained access to it (Coates 2000). However, the main reason for deploying the CAN was governmental. It was envisaged that information flows from stations to sector organisations and government agencies would improve once stations were online. While the CAN was intended to provide the means of Internet connection, the CBD was intended to provide the means by which information about community broadcasting activity could be harvested. The CBD was to be developed as a repository of data collected annually by the Community Broadcasting Association (CBA). While sector-relevant information has been consolidated on the CBOonline website since 2001, data collection for the CBD did not actually commence until 2003 (CBOonline 2003). Amongst other things, it took time for the CBA to overcome station-level anxiety about how information captured in the CBD was to be used by government agencies, as there was a clear governmental role imagined for this resource:

In particular, the data collected is instrumental in providing the information the Commonwealth Government needs to assess the role that community broadcasters play in their communities and the associated funding requirements of stations (CBOonline undated).

It would be fair to say that initiatives in digitisation that have aimed to enhance participation in program production and supply, as well as the digital media literacies of program makers and volunteers have been far more successful. The Digital Delivery Network (DDN) is a significant new digital system developed within the sector to augment the existing satellite distribution network, ComRadSat, by supporting the delivery of programs, music and text-based information to desktops and studios (Rickard 2000). It is also a strategically important technical innovation because it conditions the sector for a transition to digital transmission. The Australian Music Radio Airplay Project (AMRAP) has been another popular initiative. This has provided funds to source and generate hundreds of hours of original music content from around the country and package it for use by stations. This project which is now coming to an end has provided a range of services to musicians and stations, including music recording, duplication, distribution and promotion to stations for broadcast (AMRAP 2005).

Using the research

The McNair Ingenuity research had short term political uses. It will also have important medium and longer term public policy applications. It could also influence organisational change at the level of individual licensees, with the courses of change shaped by the uses to which the research is put.

The release of the McNair Ingenuity survey findings was timed to coincide with the 2004 federal election and helped focus attention on the community broadcasting sector's case for increased government funding. The survey was launched by the Hon Senator Helen Coonan, Federal Minister for Communications, at the CBAA offices in September 2004. Other speakers at the launch included Tanya Plibersek, ALP Member for Sydney, Senator Aden Ridgeway, Democrats Senator for NSW and John Kaye, Greens Senate Candidate for NSW. In the week following the launch, Senator Coonan announced the Coalition's commitment to providing the sector with an additional \$8.2 million over four years to be targeted towards training and transmission access support (Coonan 2004). It is fair to speculate that the strong audience figures revealed by the survey provided some incentive for the Coalition government to make a greater financial contribution to the sector.

It is also fair to speculate that the survey findings will find their way into decision-making processes and could assist in delivering more favourable outcomes on a range of important matters including terms and conditions of spectrum tenure and levels of government support for the transition to digital transmission. Survey findings will also assist stations in talking to potential sponsors in the lexicon that sponsors understand. It will help community broadcasting stations put a market value on their airtime. This use of the data is not without risks including the anxieties and problems of increasing commercialisation of programming and operations (see El-Ghul and Collingwood in this issue). Being too successful in market terms is likely to attract criticism from competitors and dry policy agencies alike, not only for being successful but also for servicing a narrow, market-based conception of consumer, rather than encouraging citizens to actively participate in public communication. The risk here is that market constructions of audiences may deliver the sector from the rock of government patronage to the hard place of open competition in matters of spectrum access.

If the experience of arts organisations over the last decade is any indication of the trajectory of change for community broadcasting in the medium term, then it is likely that pressure to professionalise station management teams will increase. This comes as a

consequence of the increasingly service-oriented approach that audience-centredness brings (O'Regan 2002). This could bring managements into conflict with various user-centred media citizenship practices and could result in the alienation of volunteers. These kinds of conflicts are not new to the sector which has years of experience in dispute resolution (for example, Tebbutt 1989). Even though managing difference is something of a sector specialty it is a capacity that will probably require on-going development, especially as the sustainability of the sector becomes increasingly contingent upon an expanded array of possibilities of knowing, being and engaging with audiences.

As well as risks there are also important opportunities that this research opens up. It can be used to build relationships with potential program funders and to renew the confidence of existing institutional stakeholders. Stations, and the sector more generally, now have the information that is needed to establish and strengthen connections to other non-commercial and third sector networks and organisations that share a common interest in the particular flows of information and people that community broadcasting enables. These are the types of relationships that will feed continuing innovation in content, formats, service delivery and media literacy in a digitising media environment. Likely partners include health, education and welfare services. This research also contributes to a foundation for exploring the role of community broadcasting in the wider development of cultural and creative industries in Australia. And there is value in this association for the community broadcasting too because these are arguably the fastest growing sectors of the economy which make them objects of strategic economic and political interest.

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