

SUBMISSION TO THE NATIONAL CULTURAL POLICY REVIEW

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Community Radio and Australian Music

This submission provides information to the National Cultural Policy review committee as part of the public consultation process. We offer research evidence and stakeholder perspectives relevant to the Australian music industry, and particularly, the significant role that the Australian community broadcasting sector is playing in the discoverability and visibility of Australian music. Our submission is based on a three-year research project, and our comprehensive final report from this project is titled [*Community Radio and Australian Music: Building the music-media ecosystem*](#)¹. In this submission, we provide our Executive Summary, key recommendations, and relevant key data to assist the current NCP review.

Our project sought to understand and evaluate the role of community radio in the Australian music industries. In exploring this, the project team conducted in-depth fieldwork at 10 community radio stations; a survey of 9000 Australians as part of the community broadcasting sector's National Listener Survey; interviewed eight established and emerging Australian musicians; and carried out a social return on investment analysis and net value analysis of the sector's contribution to Australian music based on this data.

The Australian community radio sector is large, and gaining in value and strength. It features 450 stations around the country – and is therefore a far larger sector than the 250 stations that make up the commercial radio sector. Our research is based on the 292 community radio stations that we identified as being 'music intensive' stations – their core purpose and much of their activity revolves around music airplay, promoting artists, outside broadcasts featuring local bands and musicians, partnerships with venues and festivals, and so on. Our research was carried out with the guidance of key stakeholders in both the Australian music industry, and community broadcasting. Senior staff from Creative Australia, APRA-AMCOS, the Community Broadcasting Foundation, the Community Broadcasting Association of Australia, and the AMRAP initiative formed an Advisory Group to help guide the research. We ensured First Nations stations were represented in both our case studies, and in any key analyses we carried out.

The following key findings form the heart of this submission.

- 1. Community radio music stations are a significant economic contributor to Australian music, generating \$153.1m annually for the music industries.** 'High intensity' music stations contribute more than \$105m in promotion, gigs, studio time, and music industry personnel training annually.
- 2. Community radio music stations provide a key promotional outlet for Australian songs. 390,960 hours of Australian music are broadcast annually, more than double the volume of the entire commercial radio sector (Commercial Radio and Audio, 2023), generating \$38.9m in**

¹ This research was funded by an Australian Research Council Linkage Project, LP210200844.

airplay value for listeners, artists and venues. This airplay value is in addition to royalties paid to artists directly due to community radio airplay.

3. **Community radio music stations are central to local music ecosystems.** Our 10 case study stations reported 97 relationships with festivals; 125 relationships with venues and 16 relationships with government entities. They conducted 2,496 artist interviews and 178 outside broadcasts and live events each year.
4. **The sector is a valuable national asset. For every \$1 invested in community radio music stations, up to \$5.55 is returned to the Australian music industries in socio-economic value.** The median return is \$2.47 for the top 39 'high-intensity' community radio music stations, which includes some regional stations. Broadcasters, music directors and station managers are trusted sources for Australian music via curatorship, discovery, supporting artists and as music ambassadors.
5. **Community radio music stations act as a gateway to Australian music.** Attracting more than 5 million weekly listeners (McNair Ingenuity, National Listener Survey, Community Broadcasting Association of Australia), community broadcasting is a significant and highly valued part of the Australia media ecosystem. According to Community Broadcasting Association of Australia (CBAA) listener survey data, 30% of weekly community radio listeners (which equates to approx. 1.6 million Australians) discovered a local/emerging artist by listening to community radio. 19% (more than one million Australians) recommended a local Australian artist to a friend or shared their music online after discovering them on community radio. And a further 19% of weekly listeners, or one million people, stated that community radio is the only broadcaster that plays the Australian music that they want to listen to.
6. **Community radio music stations are an economic driver in the Australian music economy.** According to targeted questions inserted by the research team into the CBAA listener survey, every year approximately 1.3 million Australians either purchase a ticket to a gig or buy artist music or merchandise after hearing their music on community radio. And 28% (approx. 1.5 million Australians) looked an artist up on Spotify or another digital music platform after hearing a local artist on community radio.
7. **Indigenous community music stations play some of the highest levels of Australian music across the entire community broadcasting sector.** Indigenous stations comprised one-third of the top 39 most 'intensive' Australian music radio stations. Our Indigenous case study stations prioritise First Nations artists, both new and established. 60% of listeners of Indigenous stations felt that music content on community radio contributes to their cultural experience and deserves financial support.
8. **Volunteers.** Across the community radio music stations, 44% rely entirely on volunteers and have no paid staff; and a further 13% have only one staff member. This suggests a high level of volunteer labour is contributing to the benefits outlined in this research, indicating that further investment in more stable staffing resources across the sector would deliver even greater benefit for the Australian music industries.

RECOMMENDATIONS

As part of the wider set of radio choices available within Australia, community radio stations do a lot more than simply play music. For listeners, they provide informed, curated music content connected to their local communities. For artists, the contribution is considerable in providing airplay, on-air

interviews, promotions and live (festival, local event) broadcasts. The 'value add' outlined in our full report reveals a collective range of activities that have discernible benefits for the Australian music industries. The following recommendations suggest measures to lift the sector's profile and reflect the heavy lifting undertaken by the sector in promoting Australian music; increase opportunities in the sector's mission to support and champion Australian artists; and widen industry partnerships. This includes ensuring that stations can meet contemporary challenges in an era of digital disruption, significantly changed consumer behaviour and the ongoing battles for resources.

RECOMMENDATION 1 Arts funding bodies should recognise the role of community radio in supporting the Australian music industries and adopt policies and funding guidelines to enable community broadcasters to grow their capability for Australian music programming, broadcast, curation and promotion. This is to be achieved through multi-year funding for station operations and workforce development as well as for defined projects with a music industry outcome.

RECOMMENDATION 2 CBAA funding and support provided, to upgrade content sharing infrastructure for Australian music content. With listeners now also discovering music on streaming services, digital platforms and social media, there is a need for stations to continue to enhance listening options. This includes the provision of on-demand digital platforms.

RECOMMENDATION 3 The CBAA should monitor and share Australian music airplay data with stations and with the music industries to highlight the contribution of community radio to Australian music. There is a recognition of the need to better promote the contributions of stations to Australian music outcomes.

RECOMMENDATION 4 Funding should be targeted to support a paid Music Director role at community radio music stations to increase the levels of grassroots music activities for social and economic benefits. This would assist in mitigating the impact of the seismic shifts in music purchasing behaviour and local live music attendance that has adversely impacted Australian music.

RECOMMENDATION 5 Further to Recommendation 4, a mentorship scheme and regular gatherings of Music Directors can be established to build an ongoing Community of Practice for this cohort. Support for these roles is crucial to increasing social and economic benefits and driving grassroots music activity at the local station level. A paid Music Director at all stations provides the greatest leverage for maximising industry station relationships, discovering new artists and supporting emerging careers.

RECOMMENDATION 6 Sector peak bodies representing stations that play high levels of Australian music should be resourced to upgrade existing digital platforms to provide improved access, discoverability and visibility of community radio music for listeners, artists and broadcasters. While many listeners clearly listen to community radio music to hear Australian artists, ongoing concerns about the discoverability of new Australian music remain across music-media. Further assistance is required in the central tasks of discovering and promoting Australian artists.

RECOMMENDATION 7 Relevant copyright bodies to investigate an exemption for podcasts and other on-demand content to increase music programs for online audiences. Many of our case study stations discussed roadblocks in converting their music programs to podcasts due to licensing restrictions and obtaining permission from the copyright owner. This is an ongoing issue across audio production and given the widespread adoption of podcasting, it provides new audience opportunities. Program hosts

seek more flexibility in designing and producing online content that ultimately increases the music content at their stations and supports Australian artists.

Background to the submission

The research that provides the evidence-base for this submission is concerned with the network of community radio stations that specialise in music content. This constitutes approximately 292 stations across the nation, or two-thirds of the entire community radio sector. Our research sought to understand how this nationwide network of community-based music radio stations deliver a range of roles, benefits and effects within the Australian music ecosystem.

It is published at a time when various industry sectors and governments have shared concerns about the visibility and discoverability of Australian music locally and within international contexts. Based on three years of research that combines a social return on investment analysis coupled with qualitative fieldwork in selected stations, our [full report](#) details the heavy lifting that community radio undertakes in locating and nurturing Australian artists, particularly at grassroots levels. The important role that community radio music stations clearly play within the Australian music industries means that it can be part of the solutions in ensuring that local artists are heard, valued and sustained.

The project aimed to:

- Map and assess the impact of community radio music stations.
- Establish a database of the economic and sociocultural contributions of community radio music stations.
- Assess the role of community music stations in the discoverability and visibility of Australian music on global digital platforms.
- Produce a series of community radio music station and music artist case studies of diverse music genres and locations.
- Construct a nationwide snapshot and reports to inform industry and government policies.

The research project team, guided by our Advisory Group of colleagues from community radio, music industry peak bodies and funding bodies, was also interested in assessing the key industrial and policy challenges of contemporary community radio music stations: (i) how the sector rebuilds momentum after the effects of the COVID-19 pandemic; (ii) the promotional and ‘incubator’ roles of the sector to the local music industries; and (iii) the technological challenges of audibility/ visibility of Australian artists in relation to global flows of music distribution and media platforms.

The shifting environment for Australian music is an issue that different parts of the Australian creative industries, arts and communications policy have been focused on for some time. The fundamental changes in consumer behaviour around music consumption – away from the purchase of artists’ music to streaming it through much cheaper global streaming platforms that return very little to the artists and recording companies – has meant a significant rethink in the way music is produced, marketed, sold, distributed and valued. Previous work by Creative Australia has honed in on this problem. The landmark *Bass Line* report, for example, identifies significant economic value generated by the Australian music industries. This research provided the first evaluation of the direct economic

contribution of the Australian music industries with an “estimated \$2.82 billion in direct gross value added (or GVA) in 2023-24 on estimated industry revenues of \$8.78 billion” (Music Australia, 2025: 3). Within *Bass Line*, radio promotions form part of “Music Media” that also includes music journalism, programming and publicity (ibid.: 81). Radio royalties were included within estimations of income derived from music rights (ibid.: 96). Further, the *Listening In: Insights on music discovery and engagement* report indicates the dominance of streaming algorithms has delivered a complex outlook for Australian consumers. While two-thirds of those surveyed indicate that they would seek out more Australian music, North American and British artists dominate their favourite artists and songs (Creative Australia, 2025: 5). A similar divergence existed in relation to music streaming platforms, where the convenience of the algorithm is at the very least diluted by its limitations in allowing listeners to be introduced to new artists and genres (ibid.: 6). Beyond the public broadcaster triple j, “participants struggled to name other places where they could discover new Australian artists” (ibid.: 55)

An Australia Institute (2025) report has examined Australian streamed music revenues from 2021 to 2024. While recorded music revenue has risen overall in this period, the “share going to local artists has shrunk by a third”; the presence of Australian artists (defined by the total number of artists streamed and the number of streams) has declined, while “Australia’s most streamed artists are ‘heritage acts’” (Paige and Harrington, 2025: 2). In changing the “one-way valve” and the predominance of UK and US acts, a re-set of curation practices coordinated by the radio and streaming sectors is recommended, accompanied by further touring support to lift Australian artist profiles (ibid.: 2, 18).

In terms of previous and recent work on radio and the music industries, the commercial radio sector’s *Connecting Communities* is notable. It finds approximately 160,000 hours (2.7m songs) of Australian music broadcast in 2022 constituting an estimated \$27 million in economic value to the music industries more broadly (Commercial Radio and Audio 2023: 24). No breakdown is provided to indicate the proportion of new/emerging artists aired or the ratio of older songs to new (highlighting the ‘heritage acts’ finding above). Further, it is worth noting that data harvested by the community broadcasting sector indicates much higher levels of Australian airplay on community radio than this: more than 390,000 hours in a single year, well over double the commercial radio figures.

This research addressed the changing landscape for Australian music with a particular focus on Australia’s expansive community broadcasting sector. As indicated above, rather than focusing on the entire sector of 450 stations we honed in on the 292 community radio music stations that offer a focus on music programming. While previous research has offered an economic value analysis (e.g. Creative Australia’s *Bass Line*, the commercial radio sector’s *Connecting Communities*), the project team deployed an SROI (Social Return On Investment) model for several reasons. Firstly, the research was assessing a not-for-profit sector with a substantial input of volunteer labour and a mix of public and private funding. Secondly, this method can account for the full range of economic, social and cultural objectives that are sometimes intangible in nature (Emerson et al. 2000; Australian Government 2010; Nicholls et al., 2012), that are fundamental to a sector such as community broadcasting.

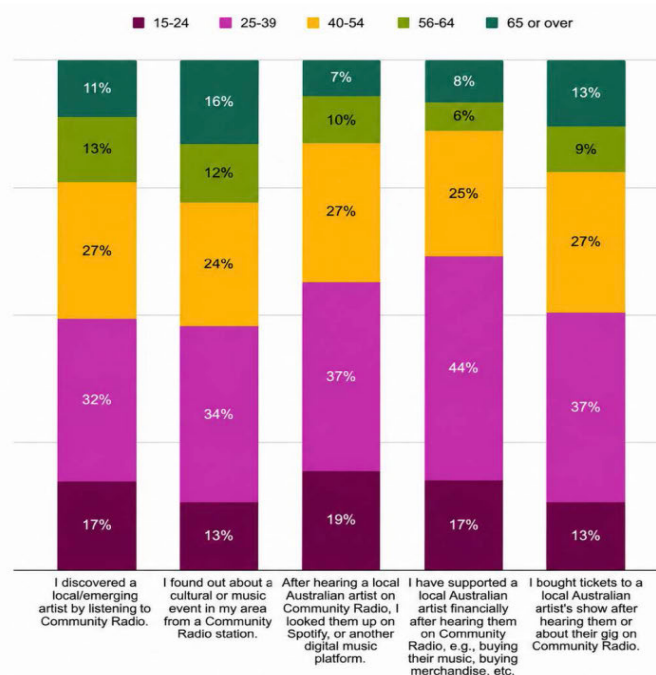
² Heritage acts’ refers to well-established and familiar artists – Cold Chisel, Dragon, The Divinyls, Choirboys, Noiseworks, John Farnham, etc. This music also forms a substantial part of the Australian music played on commercial radio

The mix of activities/outputs examined in this research certainly extend to wider ongoing national debates about (for example) consumer listening habits and technological change, where the role of community radio music stations can be rethought by all stakeholders within the broader Australian music ecosystem. For example, existing individual station infrastructure and expertise could be further integrated within calls for regional hubs “where creators can access high-speed internet, recording studios and other collaborative spaces” (Service and Creative Skills Australia, 2024: 475). This research provides key findings that are based on our Social Return on Investment model, net value analysis, and the qualitative fieldwork with 10 case study stations carried out across Australia, in urban, regional and rural areas. Interviews with artists form a further component of our qualitative interviews, with different established and emerging Australian artists reflecting on the role of community radio in their careers and the music industries more broadly.

A note: Young people and community radio

Younger audiences are integral to the future of community radio and the Australian music industries, and there has been much discussion in recent years about shifts towards streaming platforms, which are often framed as a threat to the sector. We provide a small snapshot from our full report, that puts our findings in the context of young people, community radio and Australian music.

Younger people are active listeners of community radio ...



Source: CBAA Listen Survey, 2023 Wave 2.

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49% of the listeners who discovered a local/emerging artist by listening to community radio were younger listeners (aged 15-39)

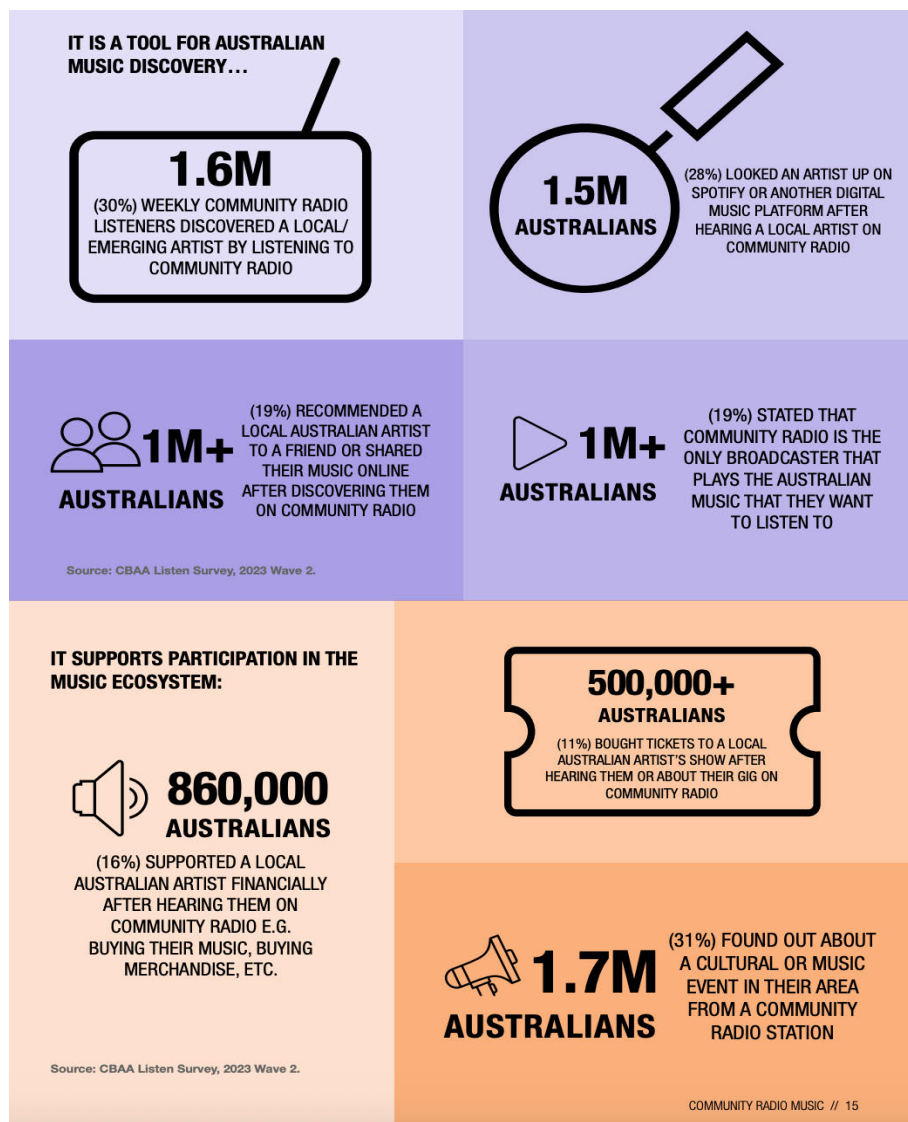
56% of the listeners who heard an Australian artist on community radio and then looked them up on Spotify or another digital music platform were younger listeners (aged 15-39)

61% of the listeners who financially supported a local Australian artist after hearing them on community radio (e.g. buying their music or merchandise) were younger listeners (aged 15-39)

Source: CBAA Listen Survey, 2023 Wave 2.

While the age and demographics of listenership are diverse across the sector, young people comprise a significant portion of community radio listeners: 46% of community radio listeners are between 15 and 39 years old (CBAA, 2023). Additionally, younger people are more likely to use community radio as a tool of discovery for local music, often hearing artists on community radio for the first time and then seeking them out on a streaming platform, attending a live show and/or buying merchandise. Listeners aged 15 to 24 were the most likely age group to discover an Australian artist by listening to community radio. The Figure above shows some key statistics about young people and their habits of listening and music discovery through community radio.

We conclude our submission with another snapshot from our report which highlights the impact community radio listening has on peoples' music-related behaviour, and how this significantly supports the Australian music industry. This is most important at a time when streaming platforms such as Spotify, algorithms driving music listening habits towards 'most listened to' acts, and the impact of increasingly high-cost international acts have had a detrimental impact on Australian music, musicians and all components of the music ecosystem.



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