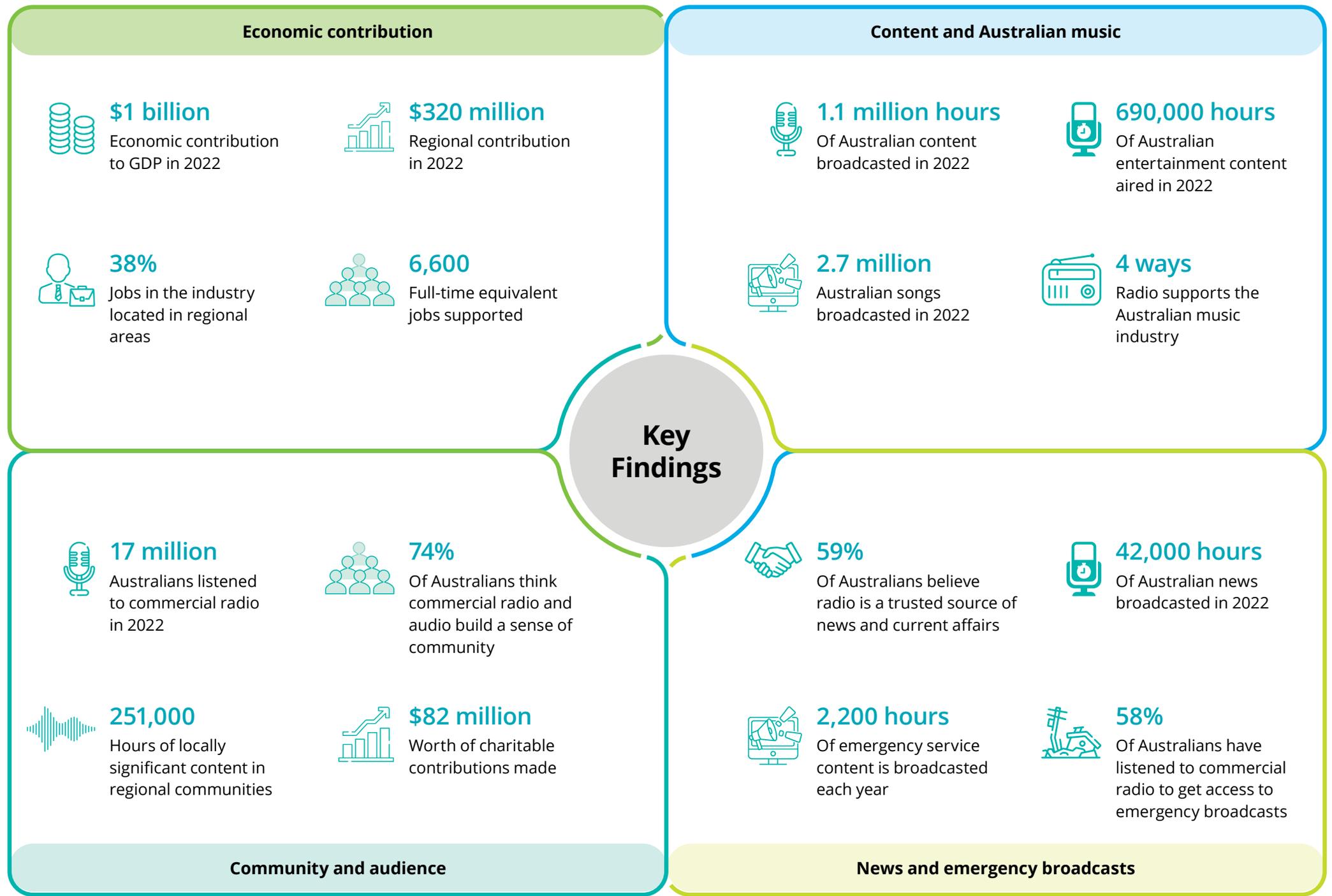




Connecting Communities: The economic and social contribution of commercial radio and audio in Australia

Commercial Radio & Audio
August 2023

Deloitte
Access Economics



Commercial radio and audio broadcasters have provided Australians with access to entertainment, music, news and emergency broadcasts for 100 years. Across the nation, there are more than 260 broadcasters providing 1.1 million hours of Australian content annually. Commercial radio and audio **connects Australian communities** as one of the few remaining local media offerings that is ubiquitous and free for all to access.



A significant generator of economic activity

It generates \$1 billion in value added for the Australian economy and employs more than 6,600 FTE staff, including 2,200 in regional areas.

Local content for local audiences

17 million Australians listened to commercial radio in 2022, which broadcasted over 1.1 million hours of Australian content.

Supporting a thriving Australian music scene

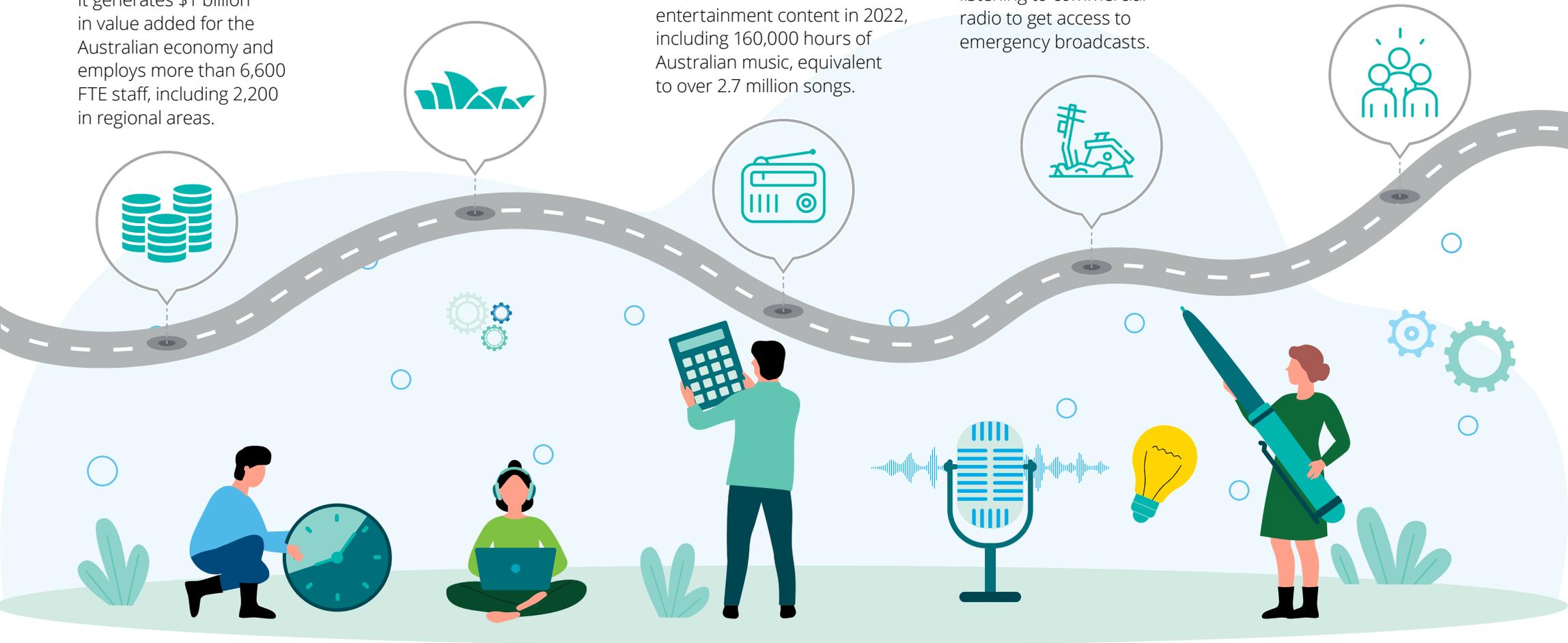
Commercial radio and audio networks broadcasted 690,000 hours of Australian entertainment content in 2022, including 160,000 hours of Australian music, equivalent to over 2.7 million songs.

A trusted source of news in times of crisis

Commercial radio and audio is a trusted source of news, with 58% of Australians listening to commercial radio to get access to emergency broadcasts.

Part and parcel of the local community

Commercial radio networks provided \$82 million in charitable donations and 74% of Australians think radio helps to build a sense of community.





Executive summary

Commercial radio and audio broadcasters have provided Australians with access to entertainment, music, news and emergency broadcasts for **100 years**. Across the nation, there are 260 broadcasters providing 1.1 million hours of Australian content annually.

Around 17 million Australians listen to commercial radio and audio each year. Audience numbers have grown by almost 14% in the five years to 2023. Commercial radio is freely available, in contrast to many other modern forms of entertainment. With consumer prices rising by 7% in the 12 months to March 2023 and cost of living pressures increasing, it is especially important for Australians to have access to entertainment which is free to access and available right across the country.

Deloitte Access Economics was asked by Commercial Radio and Audio (CRA) to measure the value of the industry's economic contribution to Australia and the broader social benefits. This includes the role of commercial radio in supporting the local community, Australia's music industry, and as a trusted provider of local news and current affairs.

The report draws on data from a range of sources including a citizen survey, existing CRA research, consultations with

various stakeholders, broader desktop research, and an industry survey fielded to CRA's members. The industry survey collected information on the financial performance of networks, contributions to the community, and content broadcasted. Nine networks representing more than 200 of CRA's 260 member stations responded to the survey. All figures referenced in the report relate to these networks only and therefore likely underestimate the total contribution of the industry in terms of hours broadcasted and economic value generated.

Economic contribution

Commercial radio and audio plays an important role in supporting economic activity in Australia. In 2022, commercial radio and audio contributed approximately \$1 billion to Australia's Gross Domestic Product (GDP) through value added, and supported 6,600 FTE jobs both directly and indirectly.

Purchases by commercial radio and audio networks indirectly support economic activity in a range of other industries. In fact, for every \$100 of direct economic activity in the commercial radio and audio industry, \$31 is generated elsewhere in the economy.

Networks broadcast in every State and Territory in Australia, supporting economic activity in regional and rural areas. The economic contribution of commercial radio and audio in regional Australia was \$320 million in 2022. In addition, 38% of commercial radio and audio's jobs are based in regional locations.

Commercial radio and audio is an effective advertising platform, with messaging that is tailored and localised to specific demographics and communities. This tailoring develops a

connection between the listener and radio content. More than half (54%) of Australians say they would personally try a brand or product endorsed in the radio or by their favourite radio personality.

Broader social benefits

Radio builds community connection by engaging listeners with Australian content relevant to them. Approximately three-quarters (74%) of Australians agree that commercial radio contributes to building a sense of community.

Stations are also committed to contributing to local charities through various initiatives, broadcasts and charitable donations. In 2022, \$82 million in support was contributed to charities and local communities by commercial radio networks.

Commercial radio and audio presents local content relevant to the specific communities it serves. Commercial radio broadcasts over 1.1 million hours of Australian content each year across music, advertisements, entertainment, news and current affairs and sports. This includes 160,000 hours of music from Australian artists. The platform provides an opportunity for Australian artists to broadcast their music to a wider audience.

News and current affairs broadcasted by commercial radio are popular sources of information for Australians. In fact, 59% of Australians agree that radio is a trusted news source, 13% say it is their top source of daily news.

In times of crisis, such as climate disasters or during COVID-19, radio is a key source of information for emergency broadcasts. In 2022, over 2,200 hours of emergency content was broadcasted. This is often the only source of live, local information which communities can trust in emergencies.



Introduction

Commercial Radio & Audio (CRA) is the industry representative body for commercial radio broadcasters. Established in 1930, CRA represents all commercial radio licensees on-air, made up of 260 broadcasters.

CRA engaged Deloitte Access Economics to prepare a report which captures the economic and social contribution of the sector in Australia.

The report draws on data from a range of sources including surveys, existing CRA research, consultations with various stakeholders, and broader desktop research. The valuation of commercial radio uses an economic contribution model, which calculates the impact of the industry using an input-output framework. The report is focused on the economic and social impacts of radio on Australia's economy and the broader community.

The report is focused on the contribution of commercial radio and audio in 2022. Over the last 100 years, radio has been a key player in Australia's media landscape, community development and broadcasting of emergency information. Over the century, commercial radio has worked hard to stay relevant by providing listeners with different ways to access content. Commercial radio and audio includes broadcast radio, digital radio and podcasts.

The work is prepared in the context of industry change and regulation. From analogue AM/FM radio, to digital radio, and now live streaming audio and podcasts, the media form has stayed agile and continues to provide a variety of content to Australians. This report captures the contribution of broadcast radio as well as these broader audio products. The sector faces competitive threats and suffered a decline in profitability during COVID-19.¹ Profits have recovered and are on track to strengthen, but remain varied across the sector.

From a policy perspective, the radio industry is classified as 'heavy regulated', reflecting the role of the Australian Communications and Media Authority (ACMA) and the reach of the Broadcasting Services Act 1992.² Some of the positive economic and social outcomes identified in this report reflect the intentions of regulation. It is important that all aspects of commercial, economic and social impacts are considered when considering long term policy settings.

Data sources

Industry survey

This report is informed by an industry survey which gathered information from nine networks for the 2022 calendar year. These nine networks represent more than 200 of CRA's 260 member stations. The survey included data on the financial performance of networks, as well as information about the content they create and the employment and charitable support they provide. All figures referenced in the report relate to these networks only and therefore likely underestimate the total economic contribution of the industry. Information provided by networks has not been independently validated by Deloitte Access Economics.



Citizen survey

In addition to the industry survey, a survey fielded by ARN and developed by Deloitte Access Economics gathered information from 1,042 citizens (both listeners and non-listeners) to understand their listening habits.

The data collected through the survey provided insight into citizen views on topics including trust, willingness to listen to advertising, listener motivations and future.

Desktop Research

Beyond the industry survey and citizen survey, the report synthesises data from various sources to provide a holistic view of the industry.

- CRA research including audience data, community contribution, total share of audio, COVID-10 listening and reports including the Power of Radio.
- Other data sources include the Australian Bureau of Statistics, and previous research by Deloitte Access Economics

Consultations

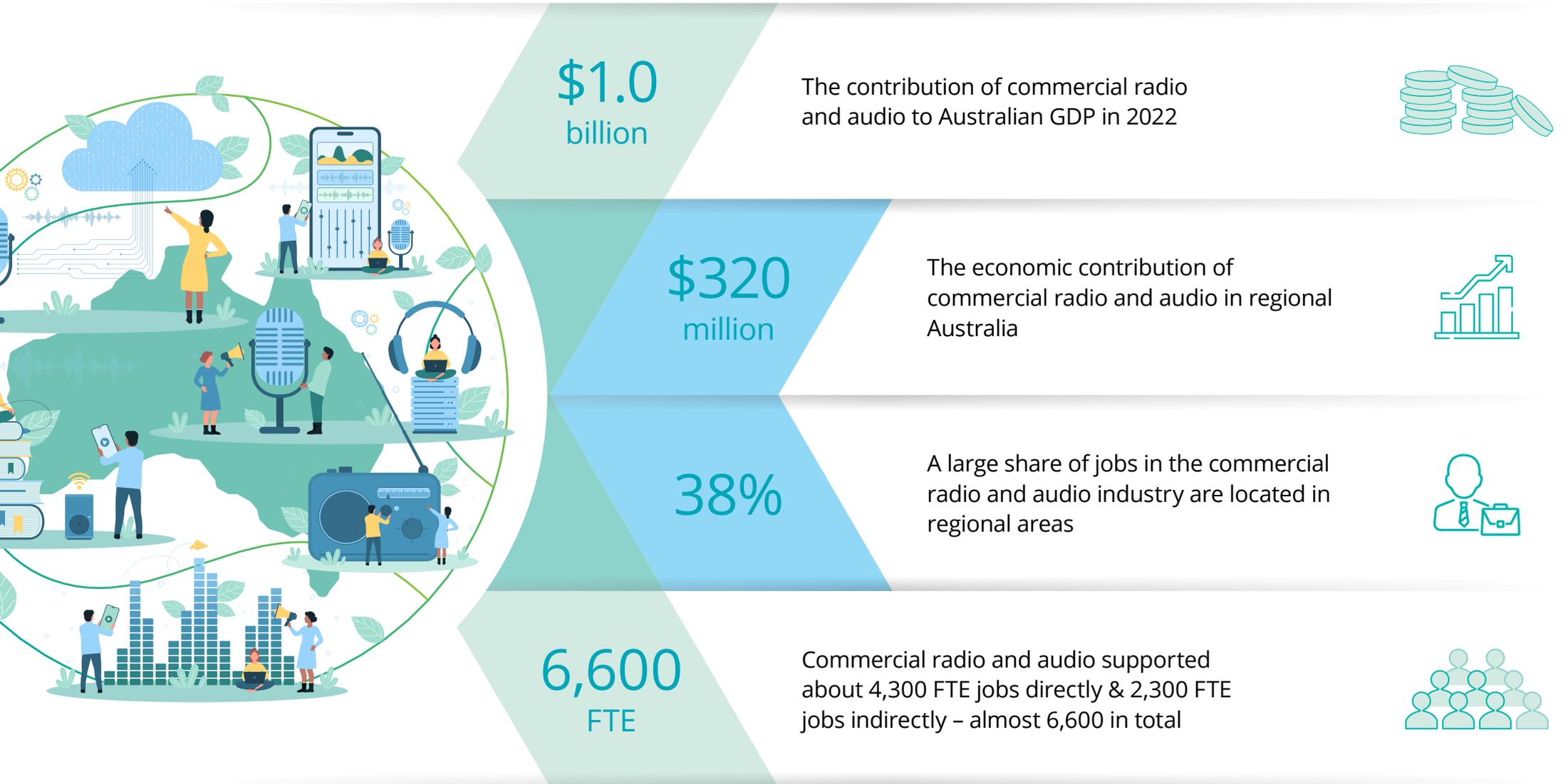
The report findings are supplemented by six consultations with relevant stakeholders, to demonstrate real-life examples of the contribution of commercial radio and audio.



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1. Economic contribution





The commercial radio and audio industry contributed almost \$1 billion in 2022

The commercial radio and audio industry makes a significant contribution to Australia's economy. In calendar year 2022, the total economic contribution of the commercial radio and audio industry was almost \$1.0 billion.

The industry adds value to the economy both directly and indirectly:

- Direct value added reflects the contributions of labour (measured by wages) and capital (measured by gross operating surplus or GOS) of the industry's own operations.
- The indirect value added captures the flow-on economic activity associated with purchases of intermediate goods and services by the industry. For instance, the production of content and payments to artists for music licensing and royalties.

The total economic contribution to the economy is a sum of the direct and indirect economic contributions, see the Appendix for further detail.

Profits in the commercial radio and audio industry have been disrupted by competition from audio streaming services and digital platforms, and consolidation in the wider media sector. Furthermore, deteriorating economic conditions during COVID-19 saw a decline in demand for advertising, causing profits to fall.³ However, profits have recovered since the pandemic and are on track to strengthen as broader economic conditions become more favourable.⁴ Despite sector disruption, radio audiences remain strong compared to traditional media formats.⁵

Compared to other creative production industries the direct value added is relatively large. This reflects the contribution that the radio and audio industry makes to labour incomes, paying out 66% the industry's direct economic contribution to workers in 2022.

More broadly, the economic contribution of commercial radio is equivalent to the value added by the ABC's commissioned content to the Australian economy.⁶

Table 1.1: Breakdown of value added by the commercial radio and audio industry, 2022 (\$ million)

| | Direct | Indirect | Total |
|-------------------------|--------|----------|-------|
| Total value added | \$670 | \$303 | \$973 |
| Gross operating surplus | \$223 | \$116 | \$339 |
| Labour income | \$447 | \$187 | \$634 |
| Employment (FTE) | 4,270 | 2,300 | 6,570 |

Source: Deloitte Access Economics based on data provided by Commercial Radio & Audio members

Note 1: This economic contribution has been calculated based on survey data provided by Commercial Radio & Audio members, and refers only to activity related to the production and broadcasting of commercial radio and audio, as well as any associated overheads. Two members did not provide a response so are not captured in the economic contribution analysis. However, based on external estimates of industry revenue, 94% of the market by revenue was captured by the survey.

Note 2: Data provided relates to the calendar rather than financial year. As a result, it may not reconcile with data presented in annual reports.

Note 3: The financial information provided by some members varied. Where aggregate information was provided, these values were imputed across categories based on industry or peer comparators.



Alongside its contribution to GDP, commercial radio and audio directly and indirectly supported almost 6,600 FTE jobs

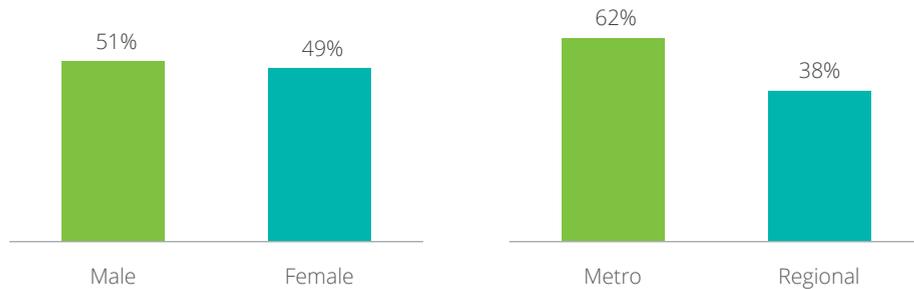
In 2022, the commercial radio and audio industry supported almost 4,300 FTE jobs directly and 2,300 FTE jobs indirectly.

Of the 4,270 FTE staff directly employed by the industry in 2022:

- 2,180 (51%) were men and 2,090 FTE jobs (49%) were women.
- 2,645 (62%) were employed in metropolitan areas while 1,625 (38%) were located in regional Australia.

While participation in the industry is representative by gender, action on pay equity and leadership is still needed.

Chart 1.1: Breakdown of staff in commercial radio and audio industry by gender and location, 2022



Source: Deloitte Access Economics based on data provided by Commercial Radio & Audio members





The commercial radio and audio industry supports a range of other industries

There was over \$300 million of indirect value added created by the commercial radio and audio industry in 2022

Commercial radio and audio purchases indirectly support economic activity in a range of other industries.

With a total indirect contribution of \$303m, for every \$100 of direct economic activity in the commercial radio and audio industry \$31 is generated elsewhere in the economy.

The largest recipient of this was the Professional, Scientific and Technical Services industry with almost \$95 million in indirect economic activity, which represents 31% of the total indirect contribution. This includes expenditure on a broad range of services including advertising and marketing, corporate costs and specialised contractors.

Following Professional, Scientific and Technical Services was Non-Residential Property Operators and Real Estate Services (\$31 million – 10%) and Employment, Travel Agency and Other Administrative Services (\$28 million – 9%).

The indirect economic activity produced through these three industries accounts for half (50%) of the total indirect contribution. Contributions are made across a range of other industries including Motion Picture and Sound Recording where commercial radio contributes almost \$27 million in value added through activities such as music publishing.

According to IBISWorld forecasts, the broader radio broadcasting market revenue is on track to rise by an estimated annualised rate of 0.7% over the five years to 2028-29. Audiences also anticipate listening to more radio and audio over the next 12 months with 94% of respondents to the citizen survey expecting to listen at the same level or more frequently than they currently do. While the industry faces ongoing competition from internet-based media competitors, growth in the online broadcasting market will enable radio stations to reach wider geographical areas and tailor content to more niche audiences. The increased variety in modes, services and types of content will help provide significant benefits for listeners. This includes commercial radio networks' production of catch-up podcasts, with Australia recently overtaking US as one of the most advanced podcast markets in the world.

Table 1.2: Indirect value added of the commercial radio and audio by industry, 2022

| Industry | Indirect Value Added | % |
|-------------------------------------------------------------|----------------------|-----|
| Professional, Scientific and Technical Services | \$94.6 | 31% |
| Non-Residential Property Operators and Real Estate Services | \$30.6 | 10% |
| Employment, Travel Agency and Other Administrative Services | \$27.9 | 9% |
| Motion Picture and Sound Recording | \$26.8 | 9% |
| Wholesale Trade | \$22.3 | 7% |
| Finance | \$11.6 | 4% |
| Telecommunication Services | \$7.5 | 2% |
| Auxiliary Finance and Insurance Services | \$5.6 | 2% |
| Computer Systems Design and Related Services | \$4.5 | 1% |
| Other Repair and Maintenance | \$4.3 | 1% |
| Other | \$67.5 | 22% |

Source: Deloitte Access Economics based on data provided by Commercial Radio & Audio members

Note: The breakdown of indirect value added by industry is informed by the granularity of data provided by responses to the survey with some expenditure categories separated in the modelling process based on industry knowledge.



Regional contribution

The commercial radio and audio industry contributes \$320 million to regional economies across Australia

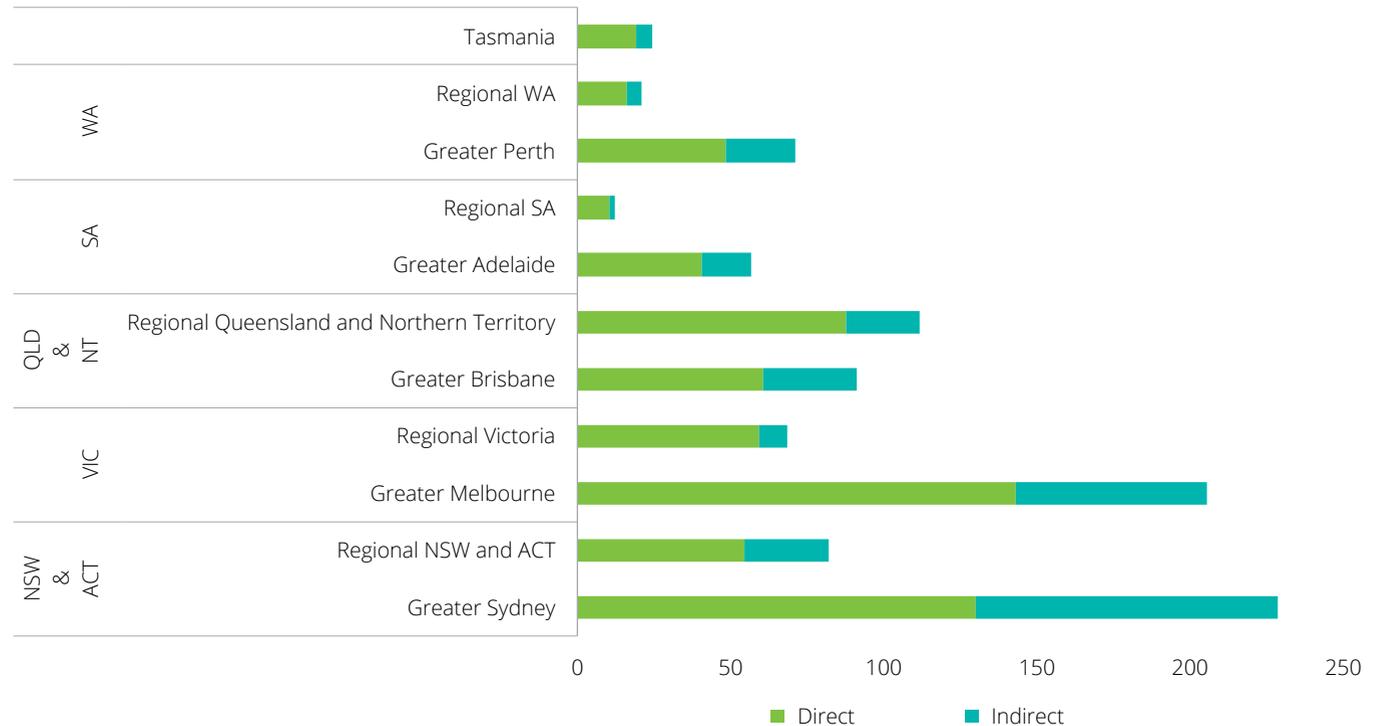
The commercial radio and audio industry contributes to the metropolitan and regional economies of each state and territory. The industry contributes most to *Greater Sydney* (\$229m), *Greater Melbourne* (\$205m) and *Regional Queensland and Northern Territory* (\$112m) areas.

More than \$320m (33%) of the economic contribution of the commercial radio and audio industry occurs in regional Australia. Proportionally this is in line with the population share of these regions.

The regional areas with the highest economic contributions are *Regional Queensland and Northern Territory* (\$112m), *Regional New South Wales and ACT* (\$82m) and *Regional Victoria* (\$68m).

See the Appendix for a full breakdown of the results within each region.

Chart 1.2: Economic contribution of commercial radio and audio by region, 2022 (\$million)



Source: Deloitte Access Economics (2023)

Note 1: Most states are broken into two regions corresponding to inside and outside the greater capital city area while Tasmania, Northern Territory and ACT are assessed at the state level. Additionally, results from the ACT has been combined with Regional NSW reflecting the overlap between NSW and ACT licence areas, and Regional Queensland has been combined with the Northern Territory reflecting the operational structure of networks responding to the survey.

Note 2: Regional areas in this analysis are inclusive of each non-capital city area, ACT, Tasmania and the Northern Territory.



The commercial radio and audio industry supports 2200 regional FTE jobs

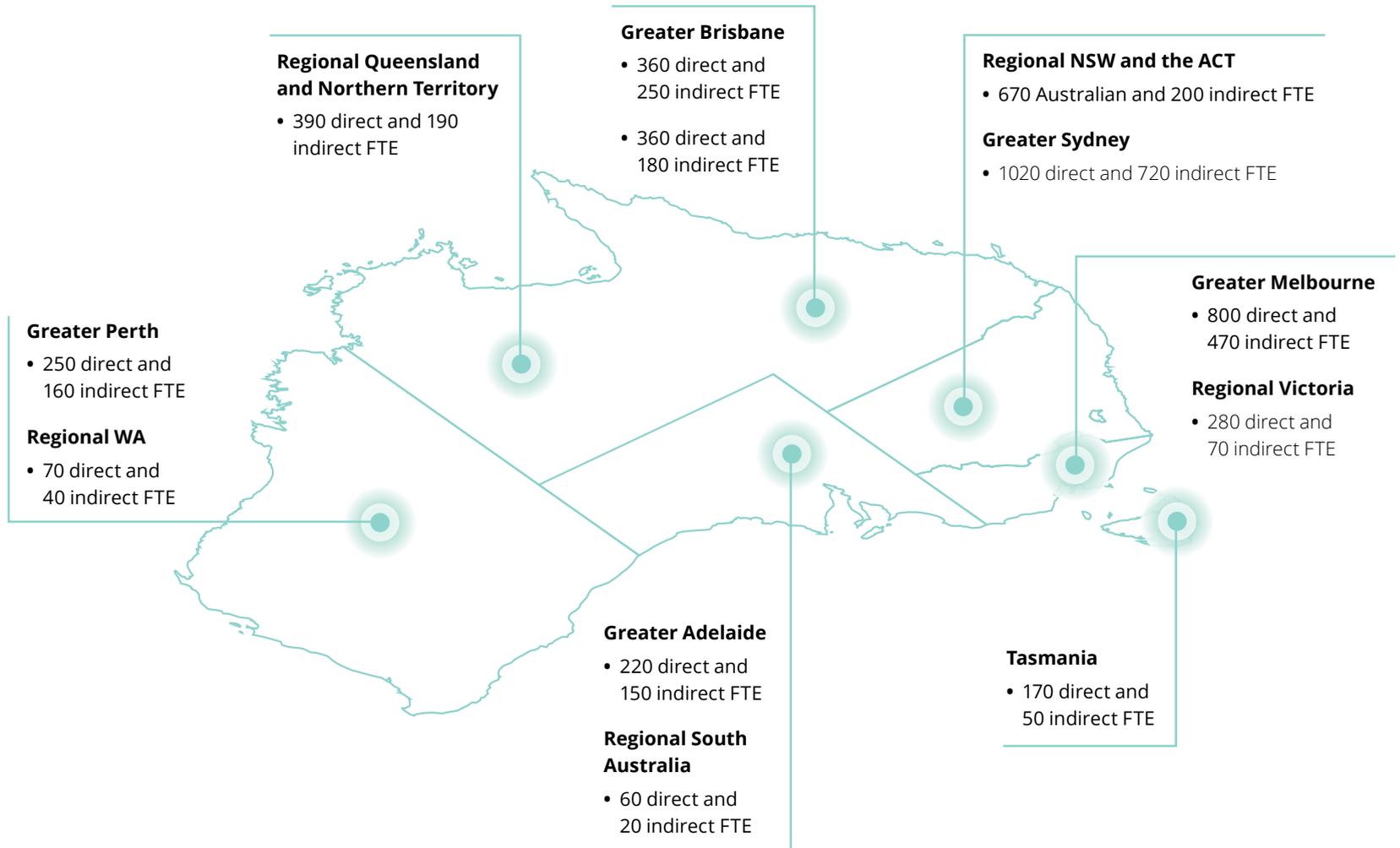
Regional FTE jobs account for 38% of the jobs directly supported by the industry

The commercial radio and audio industry directly supports more than 1600 FTE jobs in regional Australia and indirectly supports an addition to almost 600 FTE through its supply chain.

Regional jobs comprise 38% of the workforce directly supported by the commercial radio and audio industry. This is a larger concentration of jobs than the 34% of jobs located in these areas across the broader economy.⁷

The regions supporting the most number of direct FTE jobs are *Greater Sydney* (1020), *Greater Melbourne* (800) and *Regional New South Wales and the ACT* (670).

The implied average FTE wage for a commercial radio and audio industry worker across both metropolitan and regional Australia is about \$105,000.





Advertising on commercial radio

The commercial radio and audio industry plays a major role as an advertising platform for Australian businesses

The commercial radio and audio industry is a key advertising platform for Australian businesses. In fact, the brand value of the top 100 Australian brands rose by 15% in 2023 to reach \$194 billion.⁸ As a leading platform for audience reach with 12 million listeners weekly, live Australian commercial radio accounts for approximately 75% of all listening on audio platforms that have advertising.⁹

Commercial audio and radio platforms garner audience trust and loyalty through host personalities, formats, time segments and messaging that is tailored and localised to specific demographics and communities.¹⁰

This tailoring develops a connection between the listener and radio content that can effectively influence local purchasing behaviours, with advertisements resembling that of a “referral from a friend”, driving customers into store and online.¹¹ Such sentiment was demonstrated in a survey of over 1,000 citizens, with 54% of respondents indicating they would personally try a brand or product endorsed in the radio or by [their] favourite radio personality and 27% indicating they are more likely to buy products and services after listening to an ad on radio.¹²

Importantly for local Australian businesses, advertising on radio provides an opportunity to capitalise on current social trends, with research indicating consumers will go above and beyond to support their local businesses and to purchase locally produced and owned products and services.¹³





Case study: Bow Buddies Initiative

Commercial radio stations play an integral role supporting local businesses in times of need.

Ken Saville is the managing director for Innerspace Wardrobes, a local Tasmanian business that designs and builds wardrobes for homes. There are offices in Launceston and Hobart and they travel around the State, employing 23 staff.

In 2020, as a result of the pandemic and lockdowns, business for Innerspace Wardrobes essentially stopped. Most jobs required home visits and patrons weren't comfortable with this. To support their employees and keep the business going, it was important for Innerspace Wardrobes to invest in advertising to gain exposure for the company. Ken signed up to Bow Buddies, an initiative organised by Hit 100.9 Hobart to support local businesses during the pandemic with advertisement support.

The package involved airing promotions on radio, group advertisements encouraging listeners to support 'buddies' (local business participants of the Bow Buddies) and outside broadcasts (OB), where radio is broadcasted from in front of the store to get the audience down to the business. The advertising support aimed to help businesses whose operations had been affected by the pandemic.

Ken noted a significant difference as a result of the program, stating that "We noticed that it had an impact. For example, they didn't have this in the north and noticed more traffic picking up in Hobart not Launceston, even though they still had other advertising up there." Furthermore, as a result of the initiative, Innerspace Wardrobes was able to gain clients and continue operating.

The initiative also built a community for local business owners, who connected through the program and were able to support each other by sharing information and opportunities available. Local commercial radio played an important role in supporting Ken and many other local businesses through Bow Buddies, at a time of insecurity for businesses and uncertainty.

Ken noted the importance of radio, highlighting that that "People underestimate the power of radio but it gets to people instantly."



At some stage I thought we were going to have to get rid of a few staff but we didn't have to.

We were able to stay trading because we were able to be involved in programs like this at a time when it was desperate.

Ken Saville, MD, Innerspace Wardrobes



Case study: Leveraging radio as a multi-platform medium to launch, build and grow brand awareness and community engagement

Viva Leisure Ltd

Commercial radio stations are critical to connect businesses with consumers and communities

Launched and headquartered in Canberra, Club Lime is the flagship health club brand of Australian ASX listed fitness operator Viva Leisure (Viva). With over 20 years in the industry and in-excess of 170 clubs nationwide, Managing Director & CEO - Harry Konstantinou credits a long-standing relationship with amplifyCBR (HIT104.7 & MIX106.3) and its team, as a significant component of Viva's successful launch, growth and expansion.

Speaking about Viva's broader marketing strategy, Konstantinou highlighted the importance of maintaining top of mind awareness and a strong brand presence with consistent messaging via radio. As such, Konstantinou says Viva invests significant trust in commercial radio to gain audience access to speak to "the right people at the right time" through its advertising, promotions, community engagement through event partnerships and via shared relationships with many of Canberra's not-for-profit, charitable and sporting organisations – across all age-groups.

Konstantinou outlined the advantage of instant feedback and engagement among commercial radio listeners as a key advantage to advertising on commercial radio, noting, "On-air promotions generate instant feedback when people ring and win something which is really positive." He also referenced radio advertising's ability to hold the attention of consumers over a longer period, highlighting "With social media you have 4 or 5 seconds to get their attention, whereas with radio you have more time."

The immediacy-to-market and ease that radio provides is critical due to the inherently emotional drive to purchase a gym membership. New members are typically motivated to make immediate changes to improve their health by opting for a trusted, recognised brand, one they are well familiar with, rather than deliberating over a range of options.

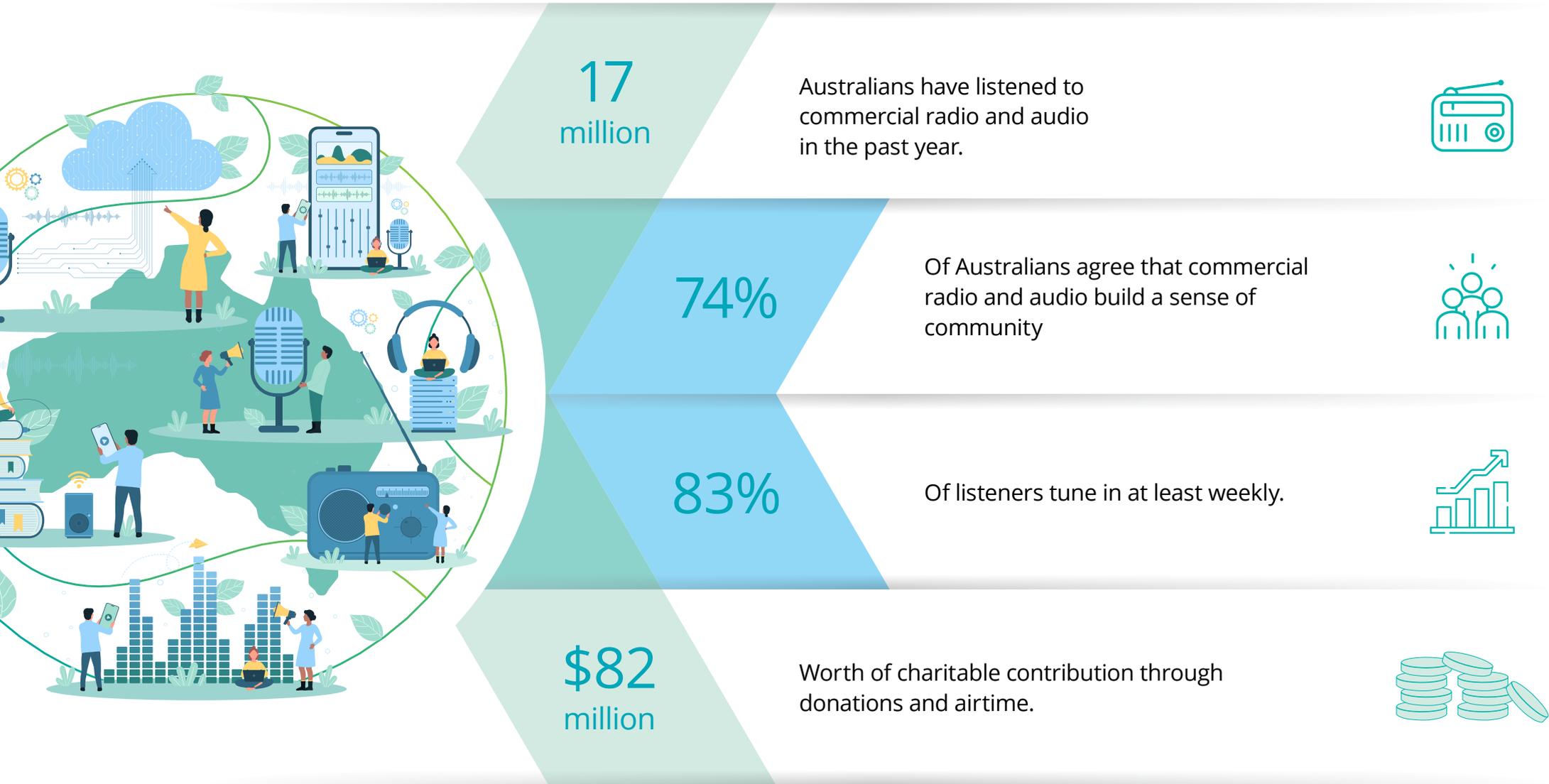
Konstantinou also elaborated on the power of commercial radio's targetability in regional areas, with Viva regularly collaborating with amplifyCBR in Canberra and numerous regional stations across NSW, VIC and QLD, through on-air promotions and sponsorship of community events. These initiatives are particularly effective for expanding into new regional markets by heightening brand awareness and driving community engagement while differentiating Viva from competitors.

One example is a competition where participating listeners received a key to open a shipping container containing a cash prize. Entrants turn up in the hope that they could open the container, with only the winner's key successfully gaining access to the prize. This provided a powerful way to launch a brand into a new market, and was more than solely advertising.

In terms of innovation, Viva and amplifyCBR have also teamed up to create Club Lime Radio/ Plus Fitness Radio, a high energy radio station dedicated to market the brand in the community and enhance the workout experience for members. The set-up, operation and maintenance of the station is entirely managed by amplifyCBR in Canberra with the station broadcasting to all Club Lime and Plus Fitness clubs Australia-wide along with DAB+ in Canberra and on iHeartRadio nationwide.



2. Community and audience





Over 17 million people listen to commercial radio and audio every year

Commercial radio and audio is frequently and widely consumed and enjoyed by listeners throughout Australia.

Commercial radio and audio reaches a wide audience across Australia. In fact, commercial radio's total audience has grown by 1.4 million listeners in the last five years in Sydney, Melbourne, Brisbane, Adelaide and Perth.¹⁴

In a survey of over 1,000 Australians, it was found that 83% of respondents have listened to commercial radio and/or audio in the last year.¹⁵ This is equivalent to 17 million people across Australia. Listenership has in fact increased over the last five years by approximately 14%.¹⁶

Most people surveyed (88%) living in metropolitan areas and 76% of those living in regional areas have listened to commercial radio and audio in the past year.¹⁷

Almost half (43%) of listeners tune in daily, and the majority (83%) listen at least weekly.¹⁸ AM, FM and digital audio broadcasting (DAB+) radio is most commonly listened to every day and weekly, whereas catch-up podcasts are more commonly listened to monthly or less frequently.¹⁹

The most common reasons listeners tune in to commercial radio include its convenience (24%), to access news, current events and live events (17%) and because it improves their mood and overall wellbeing (17%).²⁰

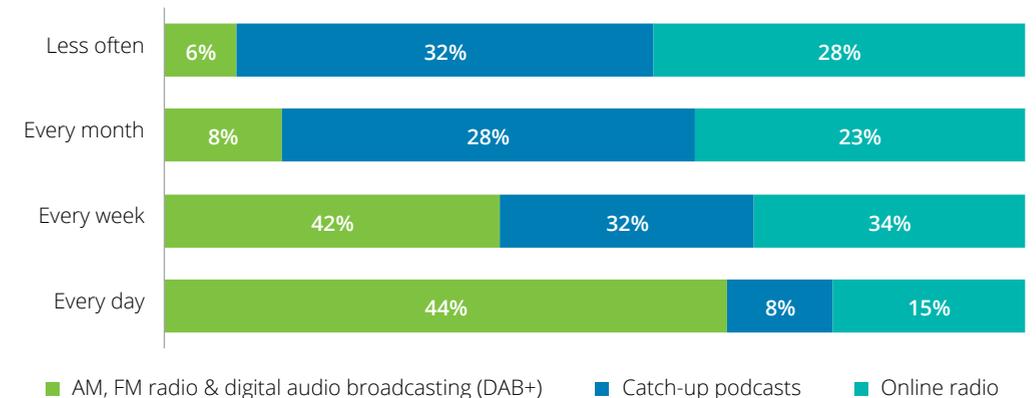
Of the audio forms examined, broadcast radio is most popular in both regional and metropolitan areas; with 77% of respondents stating they listen to this form.²¹ The most popular content types of commercial radio are music, news and entertainment. Sports content is more popular regionally than in metro regions.²²

Figure 2.1: Commercial radio and audio products consumed by listeners in the past year



Source: Deloitte Access Economics and ARN (2023). Citizen survey respondents n = 1043.

Chart 2.1: How often commercial radio and audio is listened to.



Source: Deloitte Access Economics and ARN (2023). Citizen survey respondents n = 1043.



Commercial radio and audio is free and accessible

Radio reaches audiences across Australia, regardless of location, and is freely and easily accessible.

Commercial radio and audio is a freely available, convenient and accessible medium of entertainment, news and music. Unlike many forms of media, where consumers are required to pay a subscription fee or similar, radio is free.

The cost of subscription based entertainment can add up, as was found in 2022, where the average monthly spend on subscriptions was \$62 per household.²³ During a time of economic insecurity and inflation, with consumer prices rising 7% in the year to March 2023, rising living costs are acutely felt by Australians.²⁴ As such, free modes of entertainment like commercial radio and audio can help to ease the financial stress of households as they endeavour to reduce spending.

The notion that radio is an accessible medium of entertainment resonated with survey respondents, where 85% of respondents agreed that radio is convenient and easy to access.²⁵

In addition to being a free form of media, radio is also available around Australia, connecting regional and rural Australians. In fact, 75% of people surveyed agreed that radio is freely available regardless of location.²⁶ Radio is very popular in regional and rural locations, with the majority (76%) of residents tuning in.²⁷ Of regional listeners, 77% listen at least weekly to AM, FM or DAB+ radio.²⁸

Commercial radio and audio presents a unique platform where people, regardless of location or age, can access media for free and easily that is relevant to them and their community.

Figure 2.2: Sentiments about radio's accessibility.



Source: Deloitte Access Economics and ARN (2023). Citizen survey respondents n = 1043.



Commercial radio has evolved with the times

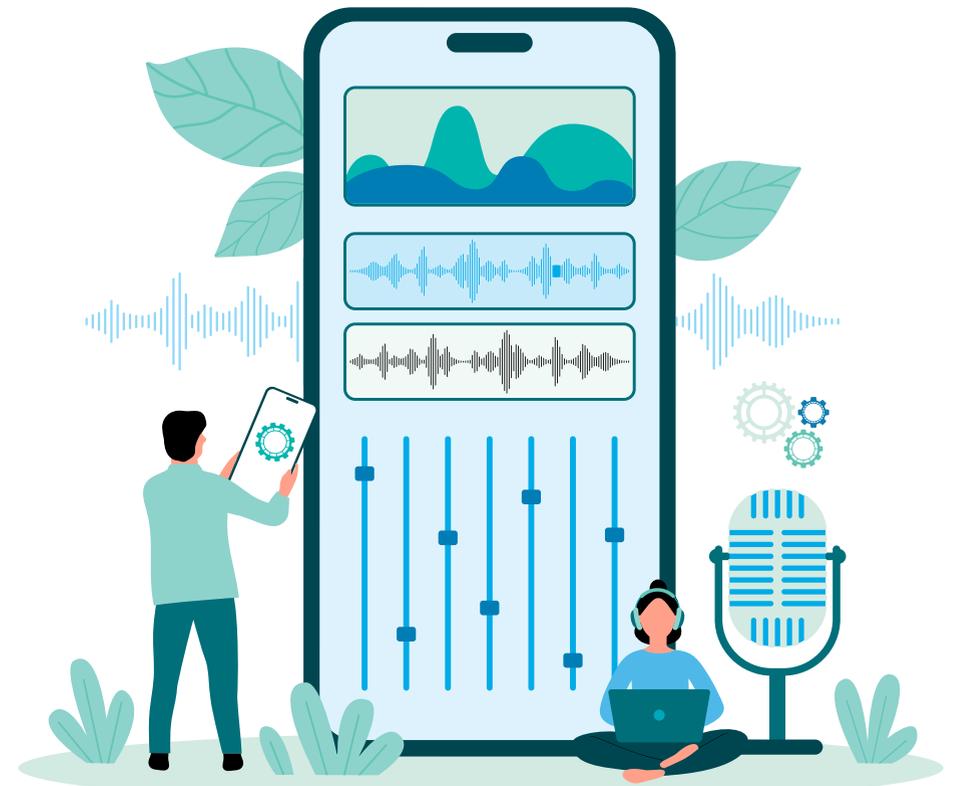
Commercial radio and audio content can be consumed through many mediums

Commercial radio and audio has been part of the Australian media landscape for over 100 years. Technological developments have disrupted the media market, decreasing the barrier to enter the industry. As a result, the broadcasting industry is more competitive and the number of media providers is growing.

Commercial radio has evolved with the disruptors, giving audiences more avenues to listen to content, such as through podcasts and DAB+ radio. Such innovation has fostered listenership, which has continued to grow. In fact, Australia has overtaken the US as one of the most advanced podcast markets in the world.²⁹ Further, in 2022, 71% of Australians listened to online audio weekly, which is an increase from 2021.³⁰

Over the last century, commercial radio has remained relevant and easily accessible to all listeners.

Continuous innovation in the commercial radio and audio industry is supported by a number of ongoing initiatives. This includes CRA and Triton's Australian Podcast Ranker which provides a regular monthly snapshot of Australia's most popular podcasts. The ranking is designed to assist brands and agencies make informed decisions on where to place their podcast advertising dollars. As listening methods and habits change, new measures of listenership allow for the industry to better understand their audience. For example, RADIO 360°, a new hybrid measurement system for listenership developed by GfK, will provide accurate and granular information on radio listening across all platforms and devices.





An important social platform

Commercial radio is integral to changing views and engaging the community

Commercial radio is an important social platform. It broadcasts programs that spark conversation relating to the community it serves, and engages listeners to support each other.

For example, Commercial Radio and Audio hosted a nation-wide mental health initiative, *You're the Voice*, to support Australians in need of mental health support or those who want to support others. The initiative included eight national mental health organisations as part of the campaign, which ran over four weeks and was broadcasted by major commercial networks. Listeners, regardless of location, were encouraged to reach out to mental health organisations for support through resources provided by Commercial Radio and Audio. The *You're the Voice* initiative illustrates commercial radio's commitment to supporting individuals and the wider community, ultimately contributing to a sense of community.

Likewise, Triple M launched their annual *No Talk Day* initiative five years ago, with the network dedicating a combined 2,400 hours of air-time to encourage listeners to take the courageous step of starting a conversation about mental health for themselves or someone they care about. For twelve hours, all Triple M microphones are switched off and wall-to-wall music with specific, targeted messaging is played. In the lead up, Triple M also provides a long-form discussion called The Courageous Talk Roundtable that shares honest, lived experiences from global and local stars, Triple M fans and listeners.

In addition, *Blak Matters* hosted by LiSTNR, is a podcast focused on sharing stories and explaining the context of Aboriginal affairs leading up to the Voice referendum. Co-host Teela Reid highlighted the importance of the podcast, stating "This is a significant year, not just for First Nations peoples, but for all Australians." *Blak Matters* provides a platform to educate Australians and has relevant information given the upcoming referendum. The podcast builds community connection through engaging listeners in a discussion about their shared environment.





Community contribution

Commercial radio contributes to the sense of community around Australia, through local broadcasts and charitable donations.

Commercial radio and audio plays a significant role in fostering a sense of community around Australia. Networks broadcast local content that caters to the interests of its listeners and run charitable initiatives, allowing people to work together as part of a community to achieve a common goal.

In fact, the citizen survey revealed that 74% of respondents agreed that radio contributes to a sense of community by broadcasting local news and community announcements.³¹

Commercial radio supports local communities through providing charitable support and airtime. In 2022, the commercial radio and audio industry made significant contributions to charities and the community. Radio stations provided at least \$82 million* of cash donations, in-kind sponsorship and community service announcements.³²

Previous analysis by Deloitte finds that the Social Return on Investment (SROI) for charitable organisations in Australia is around five dollars for every dollar invested, on average.³³ While some of charitable contribution is likely to have gone to local business and community development, the portion contributed to charitable organisations will have been amplified through the not-for-profit sector into a much larger social impact.

In addition, it is noted that there are several commercial purposes for social activities too because they involve content that people want to listen to and contribute to the brands of the radio stations themselves. However, the breadth and scale of activities highlighted in this chapter demonstrates the importance of commercial radio as an important social institution in communities.



74%

of Australians agreed that radio contributes to a sense of community



\$82 million

of cash donations, in-kind sponsorship and community service announcements.



*The benefits of sponsorships are not one-sided. Networks themselves may also benefit, for example through ticketing or marketing opportunities.



Charitable contributions

Commercial radio makes significant contributions to charities by running initiatives in the local community.

There are many examples of where commercial radio stations have supported charities and those in need. This further contributes to fostering a sense of connection in local areas by encouraging listeners to work towards a common goal to serve their community.

For example, Triple M Bendigo ran a blanket drive encouraging listeners to donate any new or unwanted blankets to support people sleeping rough in the area. Local businesses, schools and community groups worked together to contribute to the initiative, which resulted in over 2,000 blankets being donated. In addition to the donations, the initiative raise awareness of people sleeping rough and homelessness.

Similarly, the bay 93.9 Morning Crew runs the Morning Crew Kindness Campaign to support vulnerable people in the community through St Andrew's Corio which runs an emergency food relief program.

Table 2.1: Examples of engagement in community fundraising or charitable work.

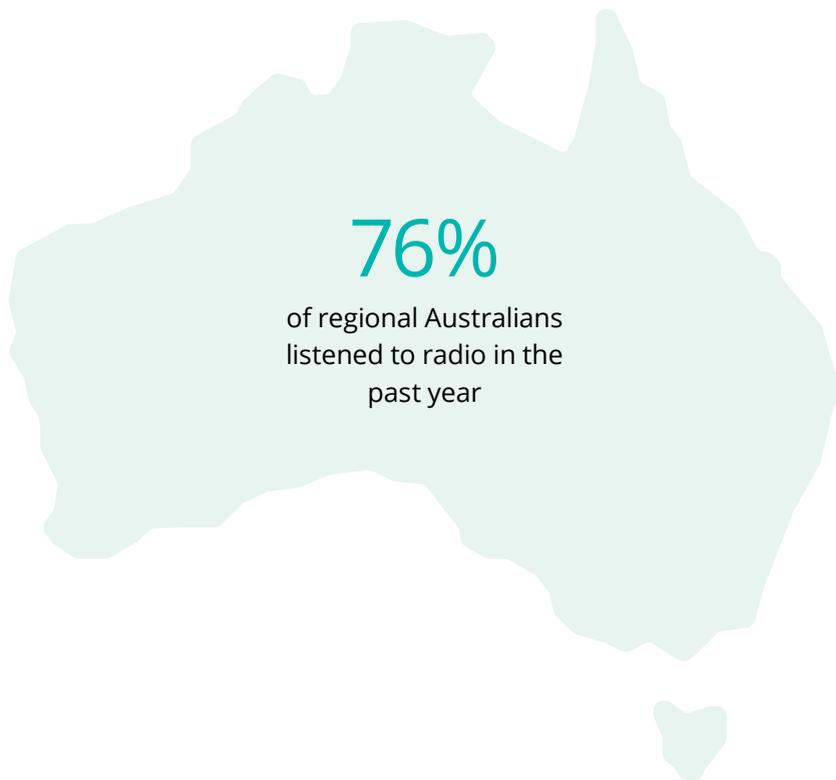
| Initiative | Network | Summary |
|---------------------------------------------------------|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Nowra Community Food Share (2022) | 2ST / Power FM | Provided the community share food store with an on-air promotion resulting in a \$50k grant, new delivery van at cost price and free servicing up to 100,000km from a local car dealership. |
| Muscular Dystrophy Awareness Warrnambool (2017-present) | 3YBFM / Coast FM (ACE Radio) | Continues to support the Gillin Boys Foundation raise awareness and money by building and hosting their website and running a telethon appeal. |
| Koinz 4 Kids (2021-22) | 7AD / SeaFM Devonport | Raised \$42,000 for the Cancer Council to help children impacted by cancer. All funds were distributed locally. |
| Share on Eyre Campaign (2021-22) | 5CC / Magic 89.9 / Kix Country | Supported West Coast Youth and Community Support with their clothing drive by collecting 28 donation bins of clothing to distribute throughout the community. |
| Hitz Helping Hands (2020-present) | Hitz939 (Bundaberg Broadcasters) | Launched a program to generate funds by partnering with local businesses. Over \$33,000 was raised in 2022 which was shared across nominated community members. |
| Movember (2020-22) | 2EC & Power FM | Each year employees participated in Movember to raise money and support Men's Health. |
| Stars of Eurobodalla / Bega (2020-22) | 2EC (ARN - East Coast Radio) | As media partners, members of staff participate in and MC events raising money for the Cancer Council. |
| The Vinnies Christmas Radiothon | 2GB | The 2GB Vinnies Christmas Radiothon raised more than \$100k to support local families doing it tough over Christmas 2022 as part of the St Vincent de Paul Christmas Appeal. More than 500 individuals – including Prime Minister Anthony Albanese, Peter Dutton, Dan Tehan, Former NSW Premier Dominic Perrottet, Current NSW Premier Chris Minns and Mark Latham – contributed to the all-day on-air campaign. |

Source: Commercial Radio & Audio (2023).



Commercial radio connects regional Australia

Commercial radio plays an important role in regional communities, through building connection, providing news and supporting local businesses.



50% of regional listeners have listened to radio during a natural disaster, compared to 42% of metro listeners.



Regional audiences are 25% more likely than metro audiences to list news and current affairs as the main reason they listen to radio.



79% of regional respondents agree that radio builds a sense of community through local news and community announcements, compared to 72% of metro listeners.



91% of regional respondents agree that locally owned business are an essential part of our community, compared to 84% of metro listeners.



Regional listeners are 16% more likely to see the value in listening to radio advertisements from local businesses as 'it is targeted and more relevant to me'.



Case study: The role of commercial radio in supporting local businesses

2NM and Power FM

Commercial radio stations are critical to connecting businesses with communities

Max Morris, General Manager of 2NM and Power FM in the Hunter Valley, understands the crucial role of commercial radio in contributing to and supporting local businesses. The stations actively promote local businesses and community groups, fostering connections and giving back to the community.

2NM and Power FM's contribution to local business includes the 'Taking care of business' campaign, a promotion run across both stations which encourages people to shop locally. The initiative goes beyond traditional advertising and provides a platform for businesses that may not otherwise have had the means to afford airtime. The campaign involves giving daily shout outs to local businesses to gain exposure and reach their target audience, and actively encouraging listeners to support local stores over online alternatives.

As a part of its focus on supporting local businesses, the radio stations perform weekly outside broadcasts in the towns throughout the area, where people are encouraged to come along and promote their businesses and important issues in the community.

Beyond the positive community engagement and local economic benefits that 2NM and Power FM are creating, Max says this can also lead to businesses coming back to the radio to buy advertising, noting the positive benefits it has created for their business.

Max also notes that the station is proud to support local talent, with 2NM and Power FM boasting their own conservatory of music to nurture local talent and organise a free community concert annually. The stations promote these artists on-air and encourage the community to attend their performances, further boosting local business.

The stations also host the annual Christmas Carol event, which attracts around 4,000 attendees per year. The show offers a platform for local businesses and vendors to participate and offer their products to a large audience. The show is also supported by sponsorships, allowing local businesses to gain further exposure on air.



We're out and being seen in the community and people love it

Max Morris, General Manager





Case study: Get Colac Back to None ACE Radio

During the pandemic in 2020, radio was integral to reducing case numbers and protecting the community.

ACE Radio Broadcasters is a family owned network that broadcasts in regional Victoria. The network played an integral role in supporting the community through the Covid-19 pandemic in 2020 in Colac, both prior to and after experiencing an outbreak of the disease. Reaching the community not only through broadcasts, but also through its social media presence, MIXX FM and 3CS, which helped to reduce cases of the virus to zero within three weeks of a significant outbreak.

In August 2020, Colac experienced a widespread outbreak of Covid-19 cases and had the highest per capita rate in regional Australia. In 72 hours, Colac had become a hotspot for Covid. Quick action was critical to protect the community. In response to the health crisis, 3CS and MIXX FM ran the initiative Get Back to None to influence the community and local businesses to take care of each other and reduce the number of cases to zero.

MIXX FM and 3CS encouraged the community to wear masks and stay at home to curb the spread of the virus through video content on social media platforms. Their social media numbers saw mass engagement with content reaching hundreds of thousands of people each month.

Further, the local radio stations leveraged relationships with community leaders to engage the community in their broadcasts. Listeners could hear from people they knew, rather than just political leaders. Rowly Paterson, owner of ACE Radio Broadcasters, stated that “they used local identities and leaders, the mayor and football captains – they are the people that are relevant”.

In addition to educating listeners on the pandemic, the radio stations ran initiatives to support the community during the challenging period. For example, they ran food drives and rallied local businesses to supply lunch for nurses working in testing clinics. The network also worked to support the local hospitality and music industry by running events like the Big Night In, which engaged the local artists and businesses.

The impact of the initiatives have been widely appreciated in Colac. Fiona Brew, CEO of Colac Area Health stated that “we wouldn’t have survived without the support of MIXX FM”. It is clear that Local radio plays a significant role in the community, as highlighted by Nick Hay, General Manager of 3CS and MIXX FM. “Whether that’s a bushfire, health crisis or a flood – it’s local radio’s time to step up.”.





Case study: Supporting charities and community organisations

Nine Radio

Commercial radio stations make significant contributions to charitable organisations

Nine Radio has made significant contributions to charitable organisations across various markets through its nationwide Community Support Program. Launched in 2022, the program is branded locally across Nine's various markets as 2GB Supports, 3AW Supports, 4BC Supports, and 6PR Supports. The initiative provides \$1.6 million in airtime and production annually to drive awareness and raise funds for charities and community support organisations.

Nine's involvement in Kind July involved encouraging listeners to engage in a simple act of kindness each day of the month, with an ultimate goal of inspiring Australians to participate in daily acts of kindness, culminating in a total 9.1 billion acts of kindness if everyone takes part. The movement promotes acts such as making tea for a loved one, taking the time to compliment and listen to others, or planning a kindness brunch for friends, all in the aim of triggering powerful positive feelings among workplaces, schools, and throughout the community.

'Stay Kind July' is one example of Nine's commitment to spreading awareness and raising funds for charities and the community. In July, 6PR Perth, alongside the rest of Nine's local stations, partnered up with Stay Kind, an organisation which promotes kindness to prevent harm from bullying, violence, self-harm, and suicide among young Australians.

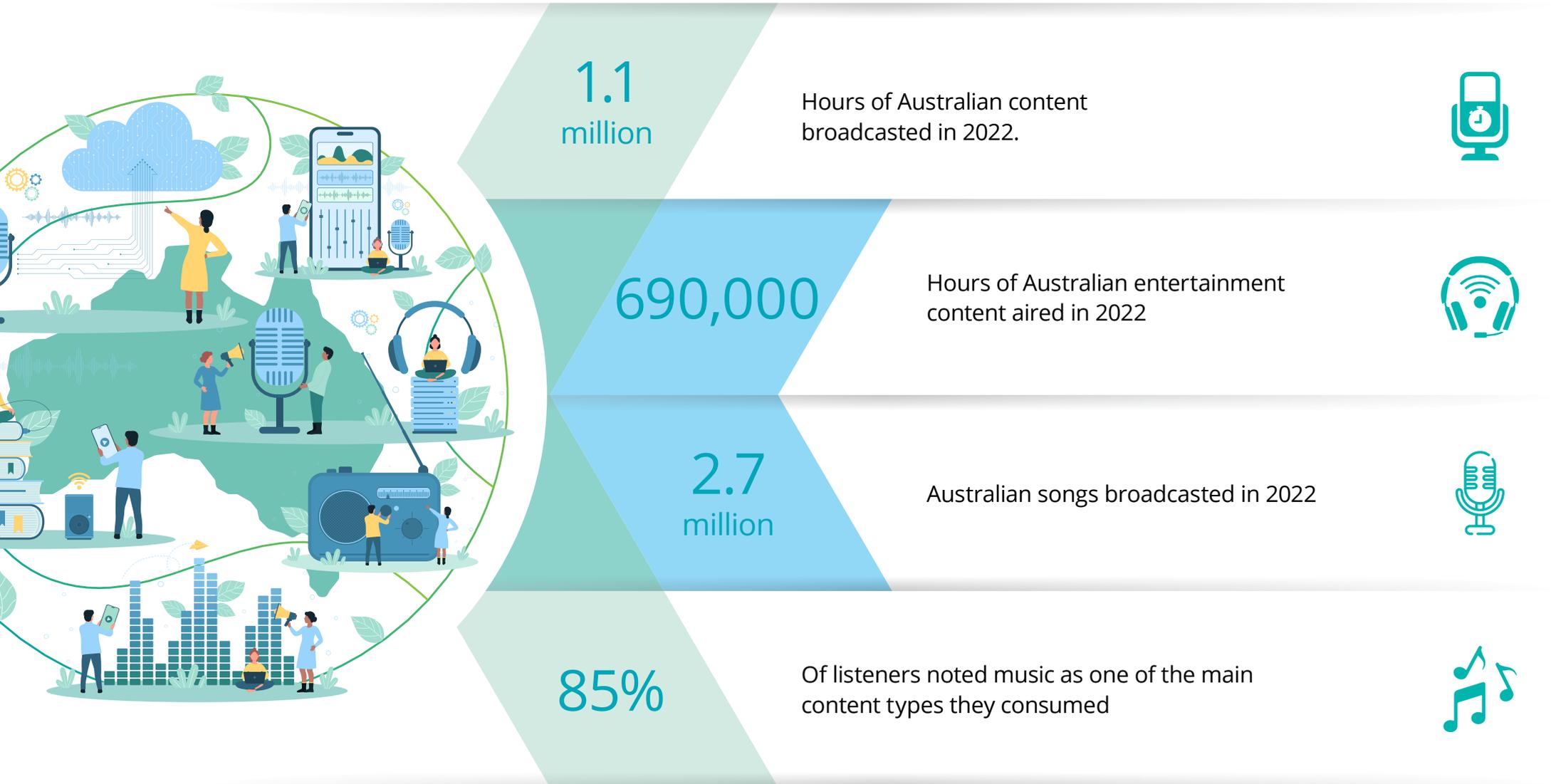
6PR Perth's contributions to the Western Australia community through the Community Support Program also include previous collaborations with the Mark Hughes Foundation, Ronald McDonald House, Cystic Fibrosis WA, Cancer Council WA, and Vision Australia.

2GB in Sydney teamed up with the Macquarie University Centre for Motor Neurone Disease Research in June to raise awareness and funds to fight the disease. Luke Davis, Content Manager of 2GB, was proud of the station's contribution to fighting to promote further awareness and funding into researching the disease, stating, "We're delighted to be able to support the team at Macquarie University Centre for Motor Neurone Disease Research as they work towards their vision of a world with no MND."

Nine also partnered up with Ovarian Cancer Australia in June under the Community Support Program. As part of Melbourne's 3AW Supports, Nine used its platform to raise awareness and drive fundraising efforts to support treatment and recovery in the fight against Australia's deadliest women's cancer.



3. Content and Australian Music





Australian music

Radio provides a platform to showcase emerging local artists and songs, and support the growth of Australia's music sector.

Commercial radio is an important part of the Australian creative ecosystem, providing a platform for musical artists and other creative professionals. Networks broadcast local, Australian music which supports the development of the music industry and artists' careers. Commercial radio also benefits from access to music that audiences want to listen to. Audiences often tune into listen to songs, as 85% of listeners noted that music was one of the main content types they consumed.³⁴

Radio stations provide a platform to showcase established and emerging Australian artists and spotlight home-grown music; investing in the local music sector. In fact, in 2022, over 160,000 hours of Australian music were broadcasted.³⁵ Further, the platform provides the opportunity for Australians to discover local content and gain exposure to Australian artists.



85%

of radio audiences listen to music as their main content type



Approximately

160,000 hours

of Australian music or

2,700,000

Australian songs broadcasted in 2022.*



*This has been estimated based on an average song length of 3.5 minutes.



Australian artists

Commercial radio stations actively promote Australian artists and broadcast music to local audiences.

Commercial radio has had a long history of supporting emerging, Australian artists. Many networks dedicate time to providing exposure of local talent.

Radio stations make a concerted effort to contribute to the Australian artists, directly through royalty payments, and indirectly by giving new artists their 'break' by playing their music, promoting gigs and upcoming tours and interviewing them on air. Commercial radio contributes \$37 million annually in royalty payments to artists. This figure includes payments to music licence and copyright bodies Australian Performing Rights Association and Phonographic Performance Company of Australia.

Triple M's *Homegrown* segment is broadcasted six nights a week on all stations nationally and exclusively features Australian artists, with a focus on emerging talent. Newer artists are interviewed, given air time and the opportunity to promote tours. The network has been committed to homegrown content for over 40 years, with a longstanding reputation as the leading radio network in Australia to discover, support and celebrate Australian artists. In fact, Triple M was awarded the 2023 Licensee of the Year Award from APRA AMCOS, at the 2023 APRA Music Awards, for its long-standing commitment to supporting Australian music.

Similarly, the Hit Network showcases local unsigned artists on commercial radio. The network was the first station to support Coodjinburra artist Budjerah's debut single on commercial radio.

It is evident that commercial radio contributes to the local music scene by giving a platform for Australian artists to broadcast their music to a large audience. Of course, radio also benefits from access to music and valuable content that engages audiences.

Figure 3.1: Radio and music – creating value





Australian content

Commercial radio and audio invests in Australian content and broadcasts material relevant to its listeners.

Commercial radio and audio presents a uniquely Australian proposition by broadcasting a variety of Australian content, including music, advertisements, entertainment, news and current affairs and live sports.

In 2022, commercial radio and audio networks broadcasted over 1.1 million hours of Australian content.^{36,i} Networks supported many different types of Australian content. The most common form of Australian content aired was entertainment, making up over 690,000 hours of broadcast airtime, followed by music and advertisements.³⁷

Airing local content engages audiences as the broadcasts are relevant to them. In regional areas, where local radio content is produced specifically for the community it serves, listeners can tune into broadcasts that can involve local business owners and community representatives who they may know. Further, in regional towns, where community connection is strong, it is more engaging to hear from community leaders relevant to listeners.

It is a requirement of the Broadcasting Services Act for radio stations in regional areas to broadcast a level of local content per business day. In 2022, regional commercial radio broadcasted 250,000 hours of material of local significance which refers to content that is hosted in, produced in or relates to the broadcast licence area.³⁸ They also broadcasted 111,000 hours of local content. Local content includes material that satisfies local content requirements of the *Broadcasting Services Instrument 2018*, including news bulletins, weather reports and community service announcements.

By presenting local content to audiences, commercial radio and audio invests in the entertainment industry and engages listeners with content that is relevant to them.

Figure 3.2: Hours of content broadcasted Australian content



Source: Member data request and Deloitte Access Economics (2023).

Table 3.1: Hours of local content broadcasted by region

| | Material of local significance | Local content |
|----------|--------------------------------|---------------|
| Regional | 250,000 | 111,000 |

Source: Member data request and Deloitte Access Economics (2023).

1.1 million hours include broadcast music, advertisement, entertainment, news, current affairs and sports, but excludes Australian podcast content.

i. 1.1 million hours include broadcast music, advertisement, entertainment, news, current affairs and sports, but excludes Australian podcast content.



Case study: Supporting Australian music

NOVA Entertainment

NOVA Entertainment supports the Australian music industry through segments such as The Maddy Rowe Aus Music Show and NOVA's Red Room.

Established in 2023, Australian artist Maddy Rowe hosts the national show weekly, featuring a combination of well-known and unsigned Australian artist interviews and new songs. Since launching, the show has garnered significant listener engagement and support indicative of the demand for Australian music post COVID-19.

Each week four new songs are chosen by Maddy and Music Director at NOVA, Jodie Williams, and broadcasted to 138,380 Australians. When asked about the impact of this on the artist, Jodie stated, "with roughly 840,000 new songs put out each week, if you get that first play, it's a massive win". This impact is magnified through social media features on NOVA's Instagram and in many cases prompts crucial conversations and email enquiries about the artist and song.



Power of radio to broadcast these artists to a broader audience. It can take one song to expose them [the artist] to a brand or label that can put them on the right track.

**Brendon Taylor, Group Program Operations Director,
NOVA Entertainment**

NOVA also provides additional assistance to as many of the non-featured artists as possible, an important component of their brand as an identifier, developer and supporter of emerging artists. For example, employees may provide:

- Specific feedback on the composition and/or sound of music
- Suggested tools to promote themselves
- Media training
- Career development

Established in 2012, approximately 50% of NOVA's 285 Red Rooms have featured Australian artists such as Vance Joy and Dean Lewis. Artists are selected based on a 'tiered system' to balance well-known popular music with emerging artists.

The Red Room aims to provide audiences with a unique experience in an intimate environment, described by Brendan Taylor from NOVA Entertainment as an opportunity to, **"see artists in an environment that money can't buy"** where fans receive an **"invite to an event rather than a ticket"**. To date, over 35,000 Australians have visited NOVA performances.

Importantly, the Red Room is flexible and scales in range depending on the artist's wants and NOVA's objectives. For example, 2,000 people at the Sydney Opera House to the Board Room at NOVA offices.

When asked about the broader impact of the NOVA network on Australian music, Brandon Taylor and Peter Colosimo from NOVA Entertainment highlighted two initiatives:

- Interviews with established artists such as Guy Sebastian on major breakfast and drive shows as critical to maintaining exposure to these artists
- Giving Australian artists the platform to showcase their skills for example, Ricki-Lee's appointment as show host on NOVA's national Drive Show.



Case study: Taylor Moss

92.7 MIX FM and 91.9 SEA FM

Local commercial radio plays a significant role in giving artists their break and supporting their careers.

Taylor Moss is a rising independent country pop Australian artist based in the Sunshine Coast, who has received significant support from local commercial radio stations 92.7 MIX FM and 91.9 SEA FM.

Taylor has been interested in singing from a young age and has always been passionate about music. After doing her work experience at 92.7 MIX FM and 91.9 SEA FM, Taylor started working for the station, learning the ins and out of radio.

As an aspiring artist, Taylor would often ask people at the station to listen to her music and was given the opportunity to play music at 14 years old. Taylor performed acoustic covers of songs live and her own original songs which were broadcasted from the local radio stations.

Three years ago Taylor's songs were put on rotation for 92.7 MIX FM and 91.9 SEA FM which had a huge impact on her career. Her songs were played three times a day on both stations. Taylor highlighted the impact of being supported by local radio noting that "people on the sunshine coast now recognise my name and I sell more tickets". In addition, she commented on how important it is for artists to be played on rotation; "being on rotation is the ultimate goal as an artist".

In 2022, Taylor had her own show at Solbar in Maroochydore and contacted MIX FM and SEA FM to help promote her concert. Her songs were put on high rotation with a short radio ID and within five days, her show sold out.

Notably, Taylor was nominated for most played country song at the APRA Awards for her song "Get it girl" in 2023. Taylor highlighted the significant impact of having the support of local radio, stating that "getting put on high rotation was one of the main reasons I did so well".



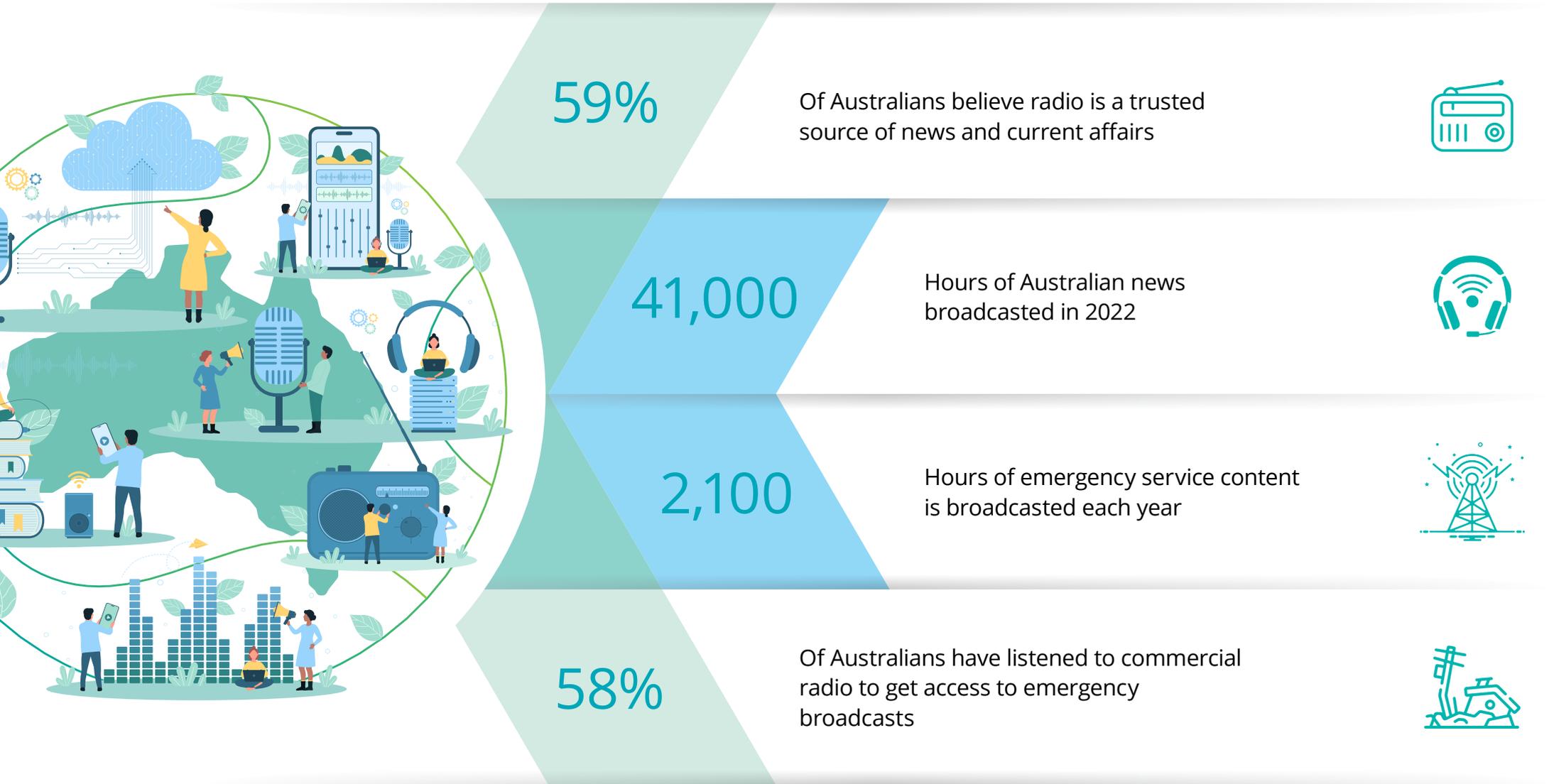
Radio really works

Taylor Moss

Radio has not only been important for Taylor's music career, but also in connecting her to the Sunshine Coast community. When she releases new music, she is invited to come to the station and be interviewed. She has found that "the sunshine coast really is a community and getting played on the radio really helps because people really want to help and support me".



4. News and emergency broadcasts





Commercial radio is a key source of daily news for Australians

42,000 hours of Australian news was broadcasted on commercial radio in 2022

Commercial radio is a trusted and widely listened to medium of news and current affairs. With more than 400 regional and community newspapers ceasing to be printed since 2019, the role of commercial radio in providing local communities with tailored content is more important than ever.³⁹

A variety of sources suggest that radio is a trusted and highly listened to source of news. According to the citizen survey, commercial radio and audio is one of the top five sources of news for Australians.⁴⁰ In addition, 59% of Australians agreed that radio is a trusted source of news and current affairs.⁴¹ While commercial radio is the fourth most trusted source of news when public broadcasters are included, radio is the second most trusted commercial source of news, just after TV.⁴² The 2022 Media Content Consumption Survey found radio was Australians' equal first choice of medium through which to consume news.⁴³ Radio is evidently an important source of news for Australians.

Radio also plays an important role in broadcasting news in regional Australia. 80% of commercial radio stations are in regions and country markets, where there are few sources of local news and information due to the closure of local newspaper groups.

At a time when misinformation and fake news are spread quickly through various forms of media, it is critical that Australians can rely on information presented to them. One study found that 64% of Australians are concerned about misinformation.⁴⁴ Commercial radio and audio provides an important and trusted channel to cut through mass information and content.

It is possible that radio is considered more trustworthy than other sources of news because it provides locally curated content. This, in turn, generates broader benefits by creating a sense of community. Almost three-quarters (74%) of respondents agreed that radio contributes to a sense of community by broadcasting local news and community announcements.⁴⁵

Networks invest heavily in curating and broadcasting local news to audiences. In 2022, almost 41,000 hours of Australian news and current affairs were broadcasted by commercial radio networks.⁴⁶

Figure 4.1: The extent of which respondents agree or disagree with these statements about commercial radio overall



2nd

Most trusted commercial source of news for Australians out of nine.



74%

of Australians agree

Radio contributes to a sense of community by broadcasting local news and community announcements.

Source: Deloitte Access Economics (2023). Citizen survey respondents n = 1043.



58% of Australians have listened to commercial radio to get emergency service information or updates

Commercial radio is often relied on during emergency events

Commercial radio is a key source of emergency broadcast information, broadcasting approximately 2,100 hours of emergency service content in 2022.⁴⁷

Three in five (58%) Australians have listened to commercial radio to access to emergency information – including health and safety information during COVID-19, natural disasters including bushfires and floods, and crime and other extreme news events.

During emergency events, commercial radio is often relied on for information and updates. A recent example includes the Shoalhaven and Highlands floods of early 2022, in which commercial radio stations 2ST and Power FM provided ongoing updates on weather conditions, road closures, river levels and evacuation warnings and orders. They were able to collaborate with community members, local Councillors and MPs, and Government and emergency bodies such as the Bureau of Meteorology and SES to provide up-to-date emergency information during the crisis to local residents.

The importance of broadcast media as a source of emergency information provisions was also recognised by the Royal Commission into National Natural Disaster Arrangements in the wake of the 2019-20 bushfires. The Royal Commission observed that governments should explore how to improve engagement between emergency managers and media representatives before, during and after natural disasters. This would help ensure that the potential for emergency information to reach the public is maximised.

Beyond broadcasting critical information, networks often use online platforms such as social media channels to extend their reach and engage with a wider audience. This multi-channel approach enables them to deliver real-time updates, emergency alerts, and safety instructions to individuals across various demographics and geographic locations, helping to maximising their impact.

Figure 4.2: Percentage of people who have listened to the radio for updates on the following emergency events



45%

of Australians have listened to radio during natural disasters



39%

of Australians have listened radio for health and safety information



22%

of Australians have listened to radio for news during crime and extreme news events

Source: Deloitte Access Economics and ARN (2023). Citizen survey respondents n = 1043.



Emergency event community service

During emergency events, commercial radio plays a significant community service role

There are many examples of where commercial radio stations have provided natural disaster and disaster recovery support for communities experiencing emergency events.

CRA networks have supported various communities experiencing emergency events across Australia. See Table 4.1 for a summary.

Table 4.1: Examples of community service work performed by radio networks during emergency events.

| Event | Network | Summary |
|-------------------------------------------------------------|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Black Saturday Bushfires / Bushfire Royal Commission (2009) | Various – Gippsland (ACE Radio) | Provided the community with vital local information during the bushfires and local ACE Radio GM Grant Johnstone gave evidence at the Victoria Bushfire Royal Commission which was instrumental in changing official Emergency Service Broadcaster recognition procedures. |
| Great Ocean Road fires (2015) | Mixx FM / 3CS | Broadcast 106 warning messages over the 72-hour period and recorded 14 interviews with the CFA incident controller which it broadcast and uploaded to its social media pages. One of its facebook posts had 4,500 likes and reached 140,000 people. |
| QLD/NSW Floods – Foodbank Australia flood support (2022) | SCA | Put two emergency flood appeal messages on air to provide listeners with donation information across the NSW & QLD network. Employees also volunteered at the Foodbank Warehouse packing food and resources. |
| ANZAC Day (2021) | 3CS / Mixx FM (ACE Radio) | Held an ANZAC Day Dawn Service in an unused sales office during COVID-19 lockdowns which was broadcast across social media channels and on-air. They received an ACRA award for their efforts. |
| Water Warriors drive (2019) | River 94.9 | Ran a Water Warriors drive and encouraged tourists to visit Stanthorpe, where local businesses and drought relief agencies hosted stalls. Any water left over after the event was distributed to local drought relief organisations. |
| Cyclone Yasi (2011) | 4KZ | Broadcast non-stop emergency information throughout the night during Cyclone Yasi, as well as regular updates during the lead-up to the event. |

Source: Commercial Radio & Audio (2023).



Case study: Lend a hand for the land

Triple M

Supporting drought-affected communities and raising awareness.

In 2019, 65% of Queensland was drought-declared after a significant lack of rainfall across the region, with droughts spanning across multiple years.⁴⁸ In turn, pasture growth and water supplies were threatened and overall agriculture production was majorly impacted due to the conditions. Communities and farmers across central, south and east Queensland were among those most affected.

In attempt to aid drought-affected communities, Rural Aid approached Triple M radio to help reach city listeners and educate them on the effects of the drought in rural Queensland. Here, the lend a hand for the land campaign was launched, with Triple M's Big Breakfast Show travelling to three rural towns in Queensland. The initiative saw a free broadcasted comedy show each night following stories of drought affected communities to help raise funds for Rural Aid drought relief.

Lend a hand for the land aimed to connect rural and metro Queensland to increase awareness surrounding the drought. Additionally, they were able to teach the greater community ways to help their fellow rural folk including donations to Rural Aid.



I have heard from the farmers themselves on the radio talking about how our donations are getting to them.

Triple M Listener

As a result of the campaign, \$90,000 was raised through Rural Aid to assist rural Queenslanders affected by the drought. Of 57% of Triple M listeners who recalled the campaign, 93% said they took some form of action to help with the drought in rural Queensland.⁴⁹ More than one in two surveyed listeners said they felt more positively toward Rural Aid after hearing the campaign on air, and of those who said they intended to donate to charity, 42% said they would donate to Rural Aid.⁵⁰





Case study: Black Summer Fires

2EC and Power FM

East Coast Radio's emergency initiatives through 2EC and Power FM

From June 2019 to March 2020, the Black Summer forest fires scorched through more than 24 million hectares of land, directly causing 33 deaths and almost 450 more from smoke inhalation.⁵¹ An estimated 1 billion animals were killed.⁵²

In turn, nearly 80% of the country's population were affected either directly or indirectly by the fires.⁵³ Bega saw four lives lost, 467 homes, and about 1,000 sheds and out-buildings devastated during the disaster.⁵⁴

Starting in November 2019, East Coast Radio, 2EC and PowerFM commenced bushfire coverage for the Currowan and North Black Range fires. From December 2019 to February 2020 they expanded their coverage of bushfires across the entire South Coast to the Victorian border. Following the conclusion of the fires, East Coast Radio Emergency Broadcasting transitioned to covering the flood events of March 2020.



Residents heard familiar local voices deliver accurate information about the emergency, which was incredibly important at such a dreadful time.

Liz Innes, Eurobodalla Mayor

2EC and PowerFM provided rolling hyper-local coverage and used the information provided by the Emergency Operations Centre (EOC) to inform the community, which aided emergency response teams in spreading information. Broadcasters were reported as, **“responsive, tried hard to interview the right people, were respectful of the EOC team, and hit the right tone with listeners”**.

As a result, community members were able to have regular access to the most up-to-date information regarding the crisis and affected locations. While power, transmissions lines and signals were challenged by the environmental conditions, it was especially important for the community to have multiple entry points of access to critical information.

When asked about this initiative, Bega Valley Shire Council Media and Communications Manager Ian Campbell shared - “At this time the familiar and trusted names, faces and voices of local media, provided comfort and reassurance to stressed communities”.



Appendix: Economic contribution methodology





Economic contribution methodology

Economic contribution studies are intended to quantify measures such as value added, exports, imports and employment associated with a given industry or firm, in a historical reference year. The economic contribution is a measure of the value of production by a firm or industry. The analysis above includes an account of the direct and flow-on value added generated by the sector in question.

A.1. Value added

Value added is the most appropriate measure of an industry's/ company's economic contribution to gross domestic product (GDP) at the national level, or gross state product (GSP) at the state level.

The value added of each industry in the value chain can be added without the risk of double counting across industries caused by including the value added by other industries earlier in the production chain.

Other measures, such as total revenue or total exports, may be easier to estimate than value added but they 'double count'. That is, they overstate the contribution of a company to economic activity because they include, for example, the value added by external firms supplying inputs or the value added by other industries.

A.2. Measuring the economic contribution

There are several commonly used measures of economic activity, each of which describes a different aspect of an industry's economic contribution. Value added measures the value of output (ie goods and services) generated by the entity's factors of production (ie labour and capital) as measured in the income to those factors of production. The sum of value added across all entities in the economy equals gross domestic product. Given the relationship to GDP, the value added measure can be thought of as the increased contribution to welfare.

Value added is the sum of:

Gross operating surplus (GOS), which represents the value of income generated by the entity's direct capital inputs, generally measured as the earnings before interest, tax, depreciation and amortisation (EBITDA).

Labour income is a subcomponent of value added. It represents the value of output generated by the entity's direct labour inputs, as measured by the income to labour.

Tax on production less subsidy provided for production. This generally includes company taxes and taxes on employment.

Gross output measures the total value of the goods and services supplied by the entity. This is a broader measure than value added because it is an addition to the value added generated by the entity. It also includes the value of intermediate inputs used by the entity that flow from value added generated by other entities. Employment is a fundamentally different measure of activity to those above. It measures the number of workers that are employed by the entity, rather than the value of the workers' output.

Figure A.1 (overleaf) shows the accounting framework used to evaluate economic activity, along with the components that make up gross output. Gross output is the sum of value added and the value of intermediate inputs. Value added can be calculated directly by summing the payments to the primary factors of production, labour (ie salaries) and capital (ie gross operating surplus, 'GOS', or profit), as well as production taxes less subsidies. The value of intermediate inputs can also be calculated directly by summing up expenses related to non-primary factor inputs.



Economic contribution methodology

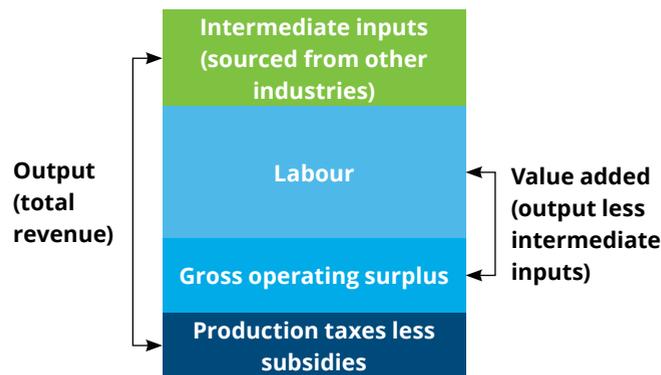
A.3. Direct and indirect contributions

The direct economic contribution is a representation of the flow from labour and capital within the sector of the economy in question.

The indirect contribution is a measure of the demand for goods and services produced in other sectors as a result of demand generated by the sector in question.

The total economic contribution to the economy is the sum of the direct and indirect economic contributions.

Figure A1.1: Economic activity accounting framework



Source: Deloitte Access Economics (2023)

A.4. Measuring the economic contribution

The economic contribution was estimated using the Deloitte Access Economics Regional Input-Output Model (DAE-RIOM). The model uses input-output tables to account for the intermediate flows between sectors. These detailed intermediate flows can be used to derive the total change in economic activity associated with a given change in activity for a sector.

A widely used measure of the spill-over of activity from one sector to another is captured by input-output 'multipliers'. This estimate is the ratio of the total change in economic activity to the change in economic activity for a given sector. A multiplier greater than one implies that the change in economic activity for a given sector has a greater impact on the economy than the value or the activity itself, in value added (monetary) or employment terms.

The input-output matrix used for Australia is derived from the 2019-20 Australian Bureau of Statistics Input-Output Tables as some associated multipliers based on 2020-21 were distorted by impacts of COVID-19. Tables have been adjusted based on the 2021 Australian Bureau of Statistics Census. The industry classification used for input-output tables is based on the Australian and New Zealand Standard Industrial Classification (ANZSIC), with 114 sectors in the modelling framework.

A.5. Regional contribution

DAE-RIOM disaggregates national tables by small regional areas, ABS Statistical Areas Level 2 (SA2s), which can be aggregated to larger regions (in the case of this study, SA3s). The sum of intermediate inputs, labour income, GOS, and tax across the 2,454 SA2 regions in the DAE-RIOM model is equal to the national state IO tables, such that a region can be 'carved out' of the national tables.

A key underlying assumption of the DAE-RIOM is that regional economic activity is proportional to the employment by place of work. Given this underlying assumption, the share of regional value added, output, and employment as a share of total value added, output, and employment, respectively, is the same for all measures of economic activity.

A.6. Project specific limitations

The financial information provided by respondents varied. Where aggregate information was provided, these values were imputed across categories based on industry or peer comparators. Similarly, revenues and expenses that were unable to be allocated to a specific region (accounting for 16% of the total) were allocated based on the share of FTE employment for each respondent.

Appendix: Regional economic contribution results





Regional economic contribution results

Table A.2: Summary of regional economic contribution results

| Region | Value add (\$m) | | | Full-time equivalent employment | | |
|--------------------------------------------|-----------------|------------|------------|---------------------------------|--------------|--------------|
| | Total | Direct | Indirect | Total | Direct | Indirect |
| Greater Sydney | 229 | 130 | 99 | 1,740 | 1,020 | 720 |
| Regional NSW and ACT | 82 | 54 | 27 | 870 | 670 | 200 |
| Greater Melbourne | 205 | 143 | 63 | 1,270 | 800 | 470 |
| Regional Victoria | 68 | 59 | 9 | 350 | 280 | 70 |
| Greater Brisbane | 91 | 61 | 31 | 600 | 360 | 240 |
| Regional Queensland and Northern Territory | 112 | 88 | 22 | 390 | 390 | 190 |
| Greater Adelaide | 57 | 40 | 16 | 370 | 220 | 150 |
| Regional SA | 12 | 10 | 2 | 80 | 60 | 20 |
| Greater Perth | 71 | 49 | 23 | 410 | 250 | 160 |
| Regional WA | 21 | 16 | 5 | 110 | 70 | 40 |
| Tasmania | 24 | 19 | 5 | 220 | 170 | 50 |
| Australia | 973 | 670 | 303 | 6,600 | 4,290 | 2,310 |

Appendix: Citizen survey





Citizen survey

Consumer perspectives on commercial radio and audio in this report were sourced from an citizen survey fielded by ARN. The data collected through the survey provided insight into citizen views on topics including trust, willingness to listen to advertising, listener motivations and future trends.

The data collected through the survey provided insight into 1,042 respondents views on topics including trust, willingness to listen to advertising, listener motivations and future trends. The sample included both people who do and do not listen to commercial radio and audio.

Chart A.3.1: Respondent location

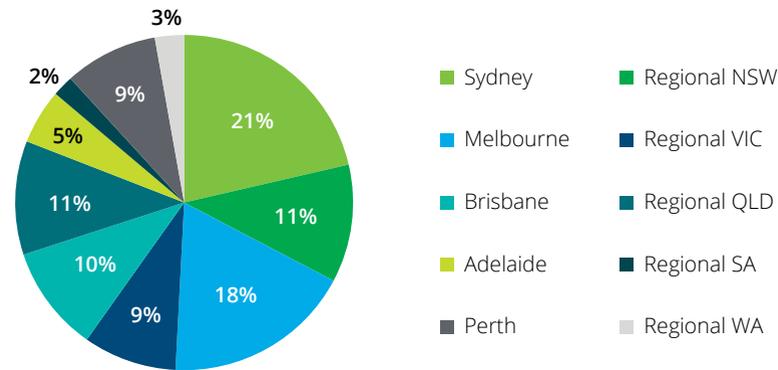


Chart A.3.2: Respondent age

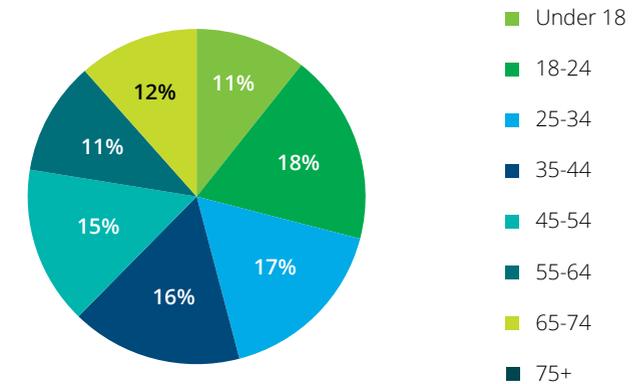


Chart A.3.3: Respondent work status

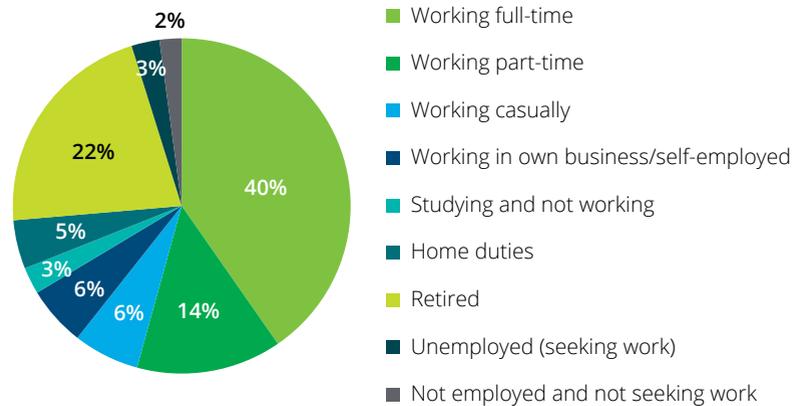
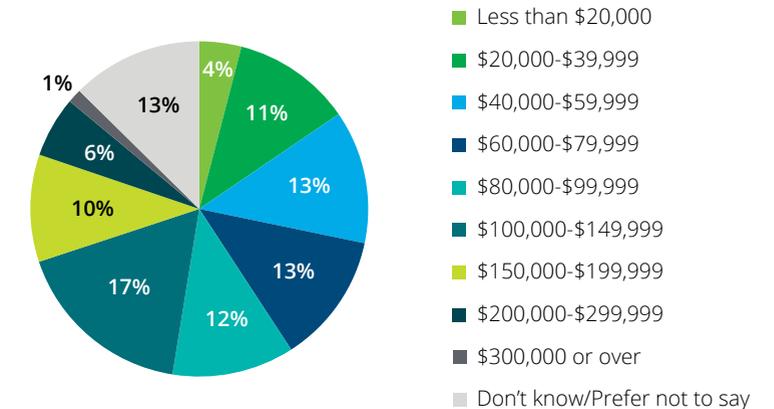


Chart A.3.4: Respondent household income





Citizen survey

Chart A.3.5: types of commercial radio and audio products (specifically excluding the ABC and community radio) have you listened to in the past year?

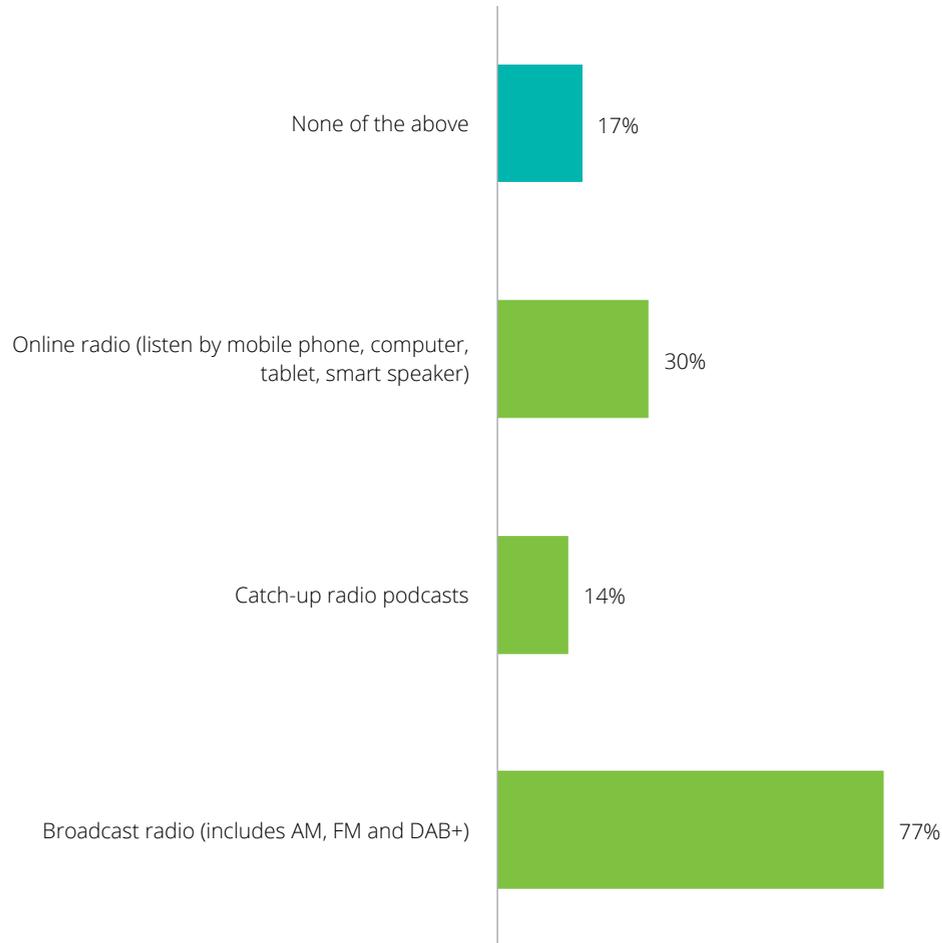
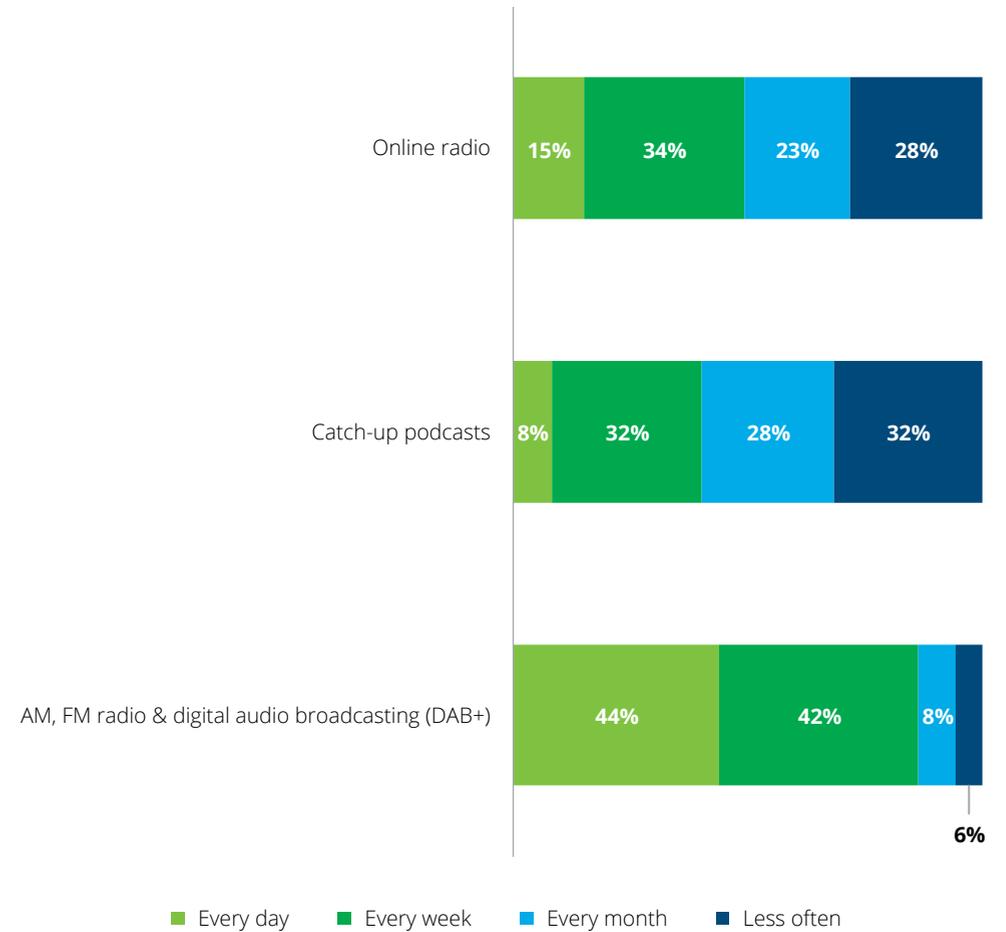


Chart A.3.6: How often do you listen to commercial radio and audio?





Citizen survey

Chart A.3.7 What are the main content types you listen to on the radio?

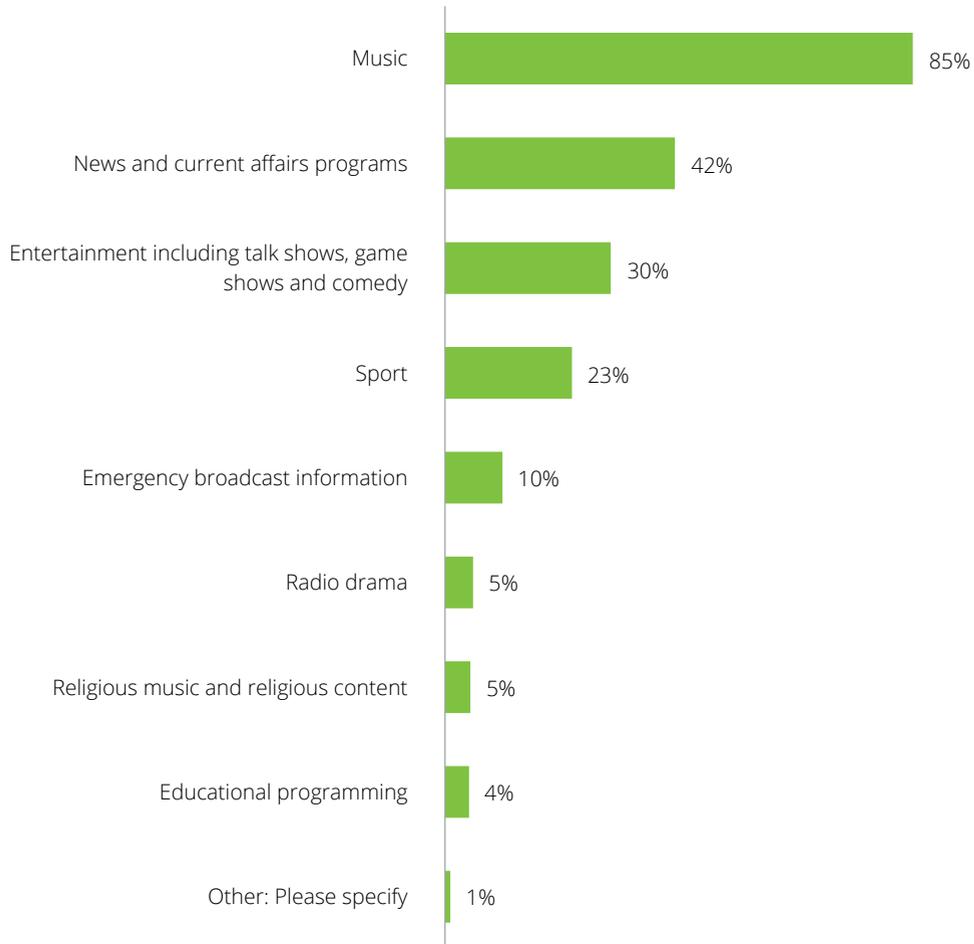
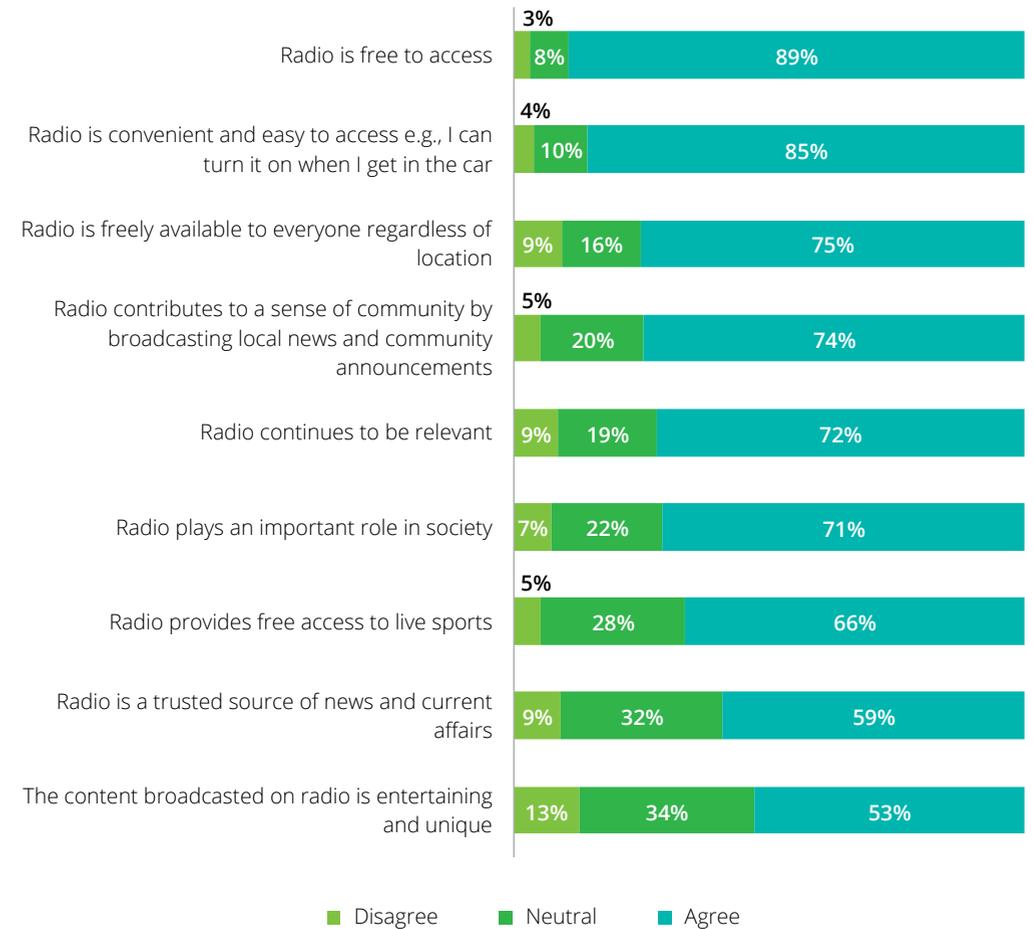


Chart A.3.8: To what extent do you agree or disagree with the following statements about radio overall?





Citizen survey

Chart A.3.9: What is the main reason you like to listen to commercial radio and audio?

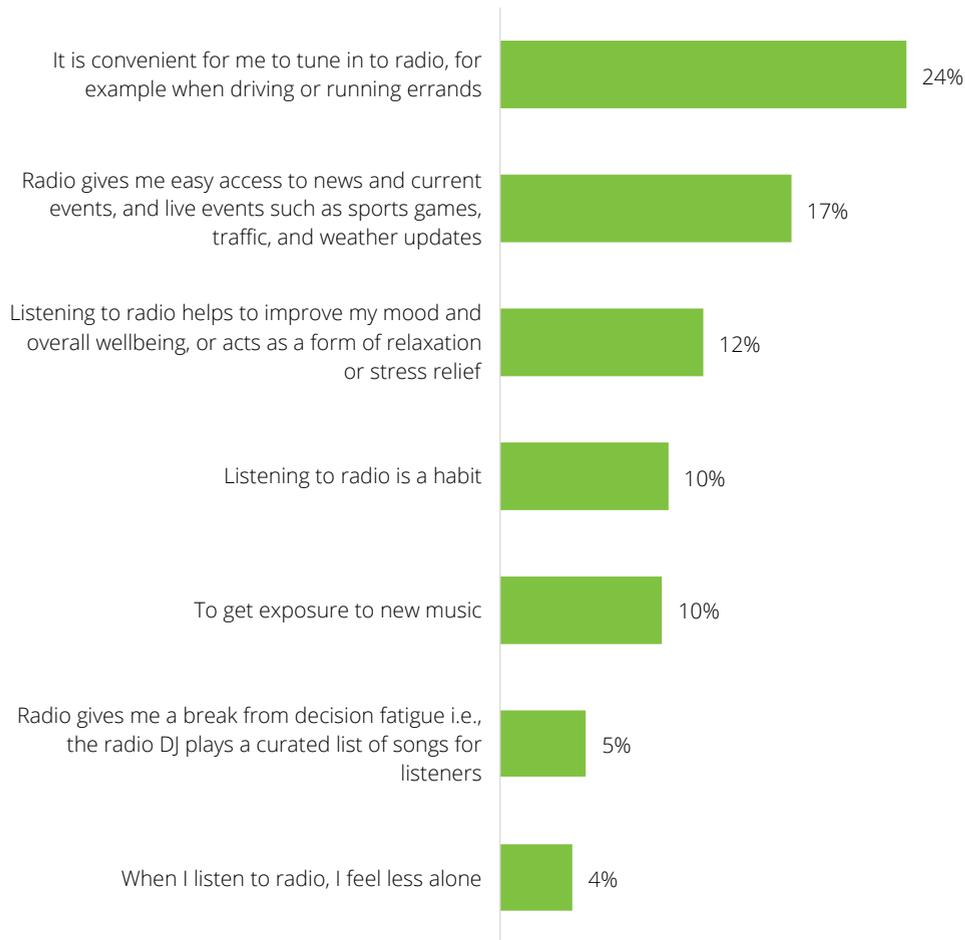
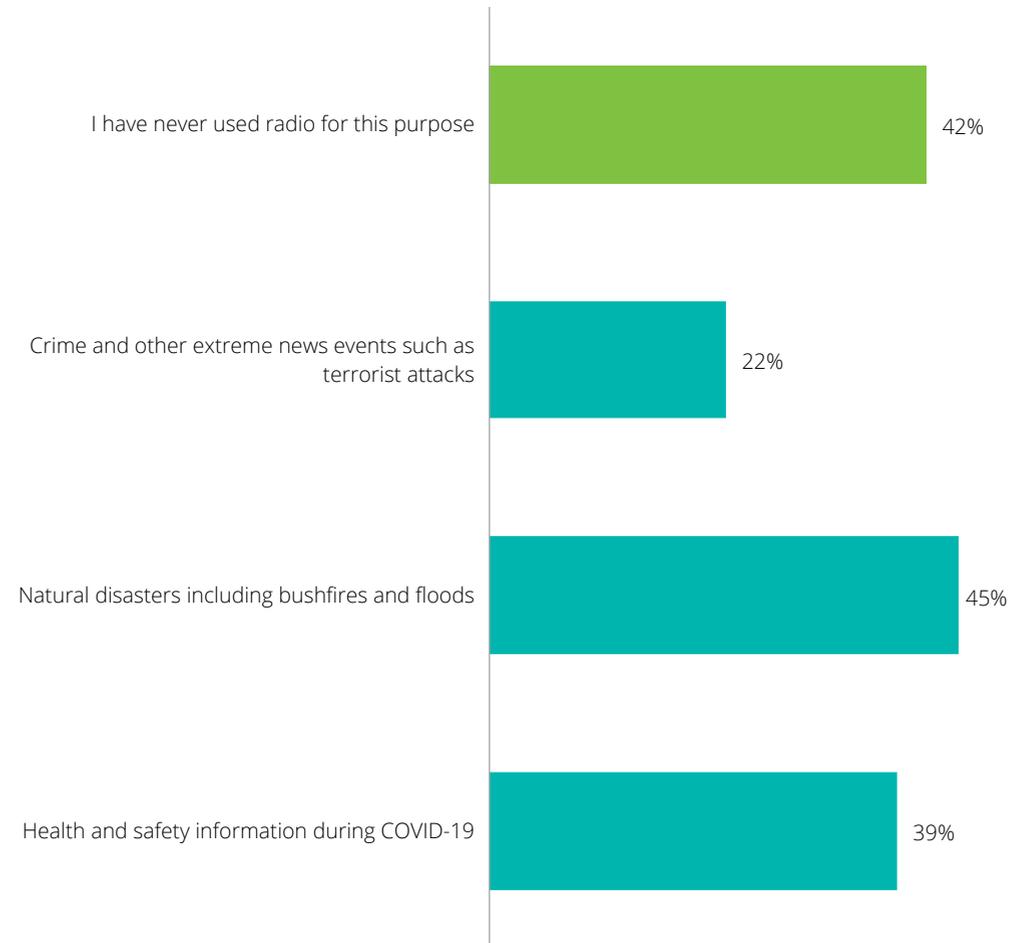


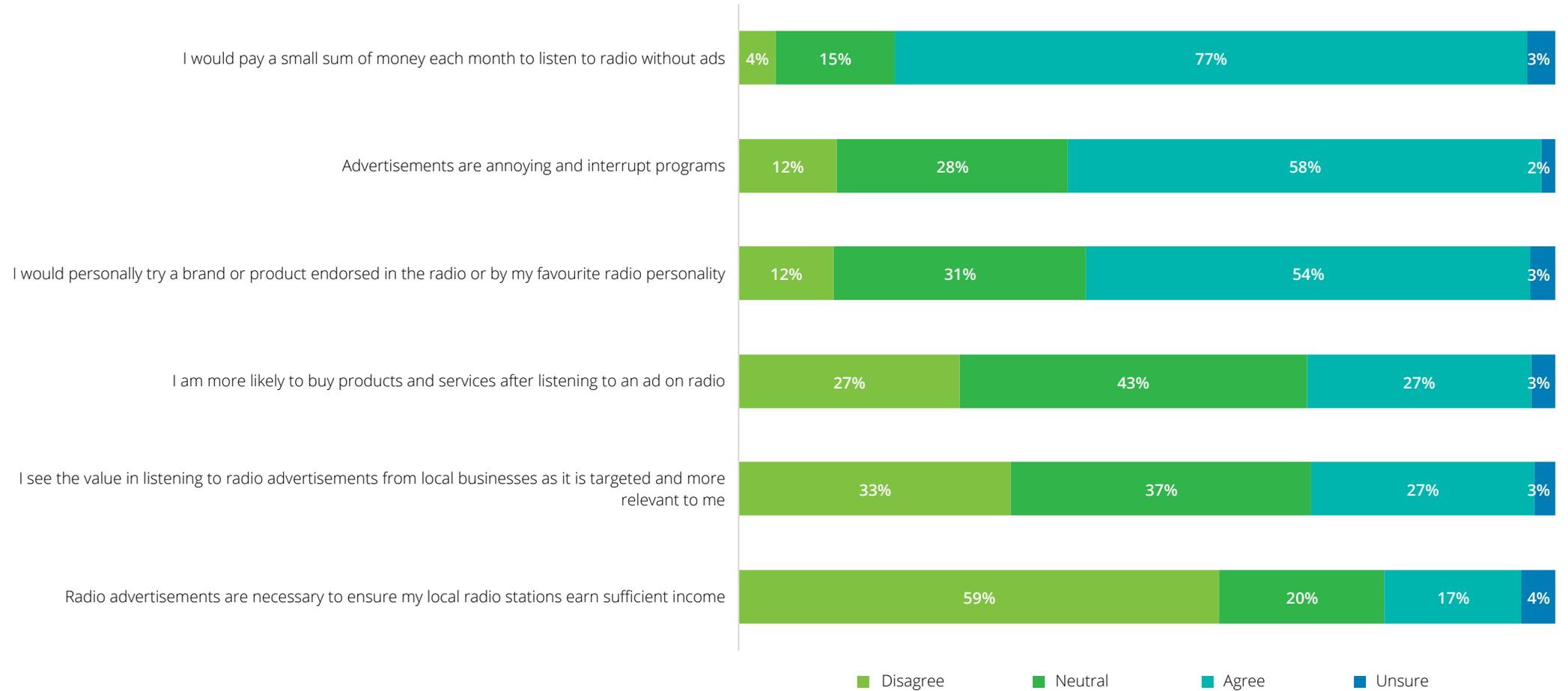
Chart A.3.10: Have you listened to commercial radio to get access to emergency service information or updates on the following events?





Citizen survey

Chart A.3.11: Please indicate the degree to which you agree or disagree with the following statements about advertising on commercial radio.





Citizen survey

Chart A.3.12: Please rank the following media sources in terms of trust that the news and information received from those sources are accurate (Rank 1)

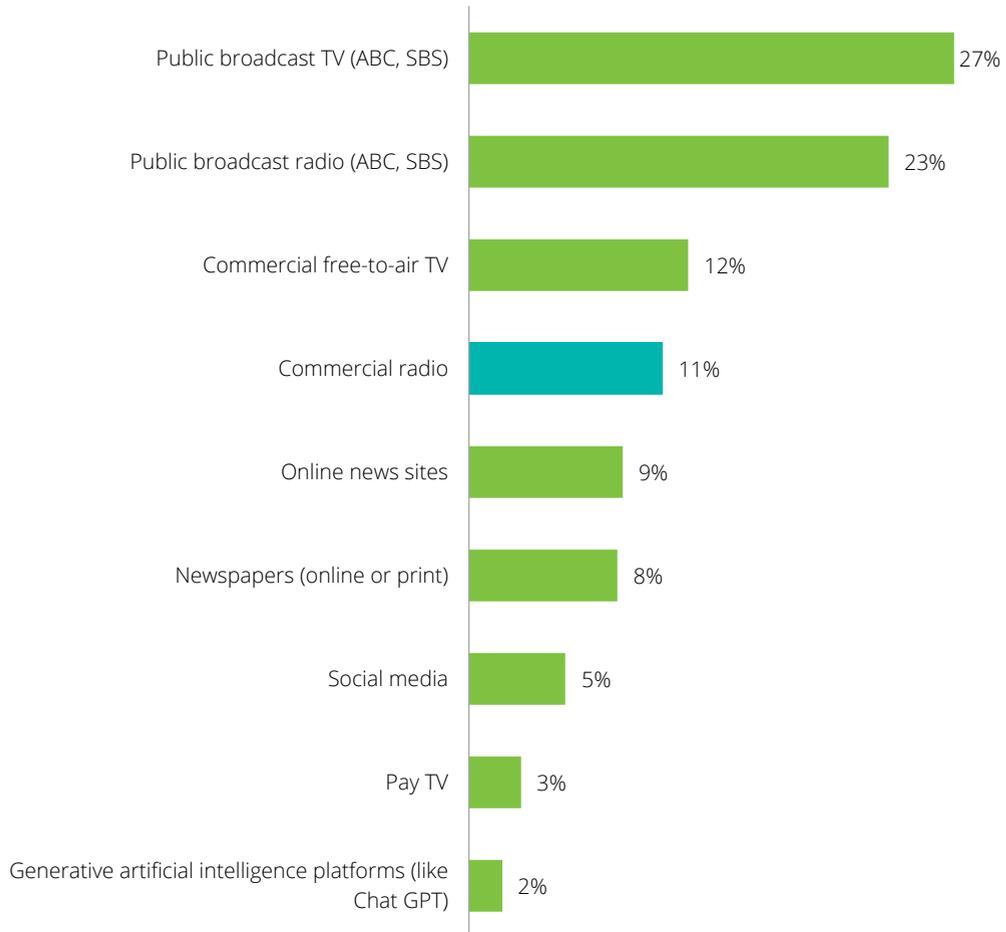
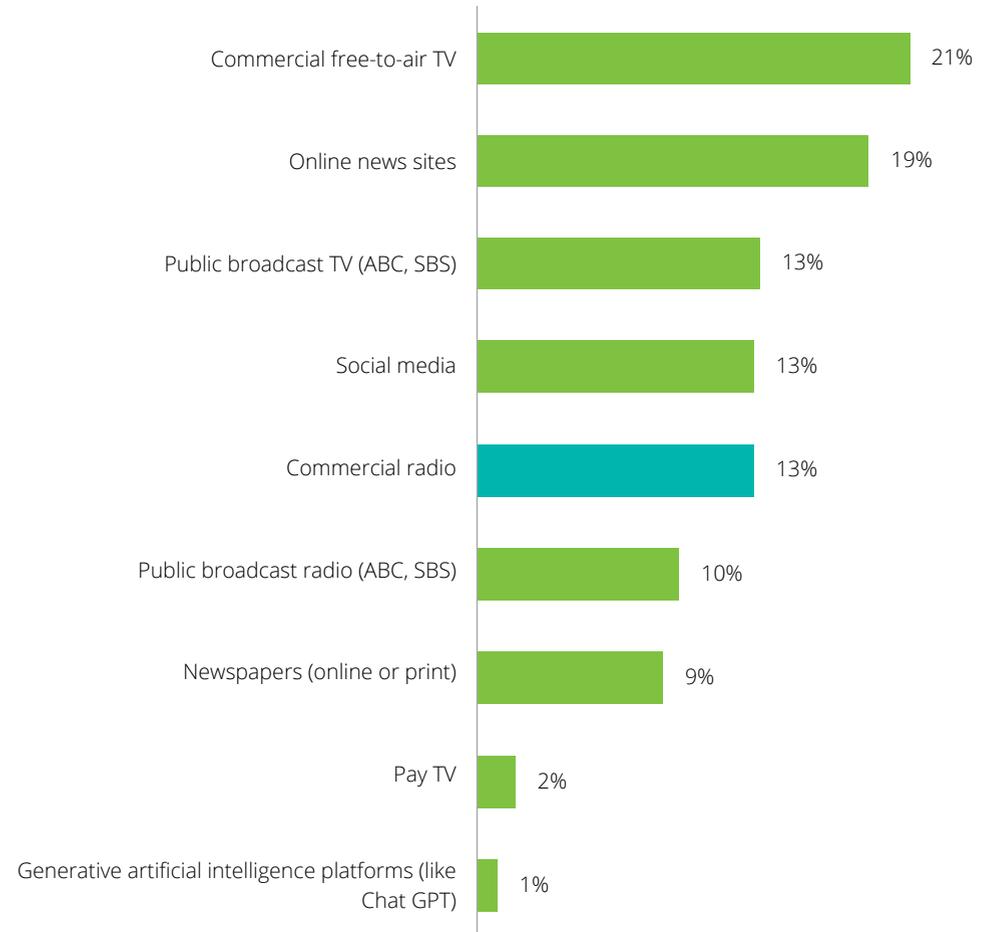


Chart A.3.13: Please rank the following media sources, with 1 being the most frequently used source of news (Rank 1)



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Acknowledgement

We would like to thank ARN for their assistance with coding and fielding the citizen survey.



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