

A new framework for measuring media diversity in Australia

Consultation paper

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Executive summary

Media diversity is a critical and longstanding objective of the Australian regulatory framework. The existing legislative scheme seeks to encourage the production and distribution of a wide range of information and viewpoints across the media market, while preventing any single media voice from exerting undue or unacceptable levels of influence over public discourse.

These objectives continue to resonate with Australians. However, in response to increased reliance on digital news sources, and a growth in newsroom closures and consolidations, there are concerns around the current state of media diversity in Australia and the adequacy of the existing legislative reach.

Internationally, media diversity is recognised as important to healthy democracies and many governments require its measurement, assessment and protection.

The Australian Government is seeking to build a robust evidence-base about the news media industry to support policy interventions and inform longer-term considerations on media reform.

In December 2020, the ACMA released a research paper outlining a potential ‘news measurement framework’ that could help monitor levels of diversity across Australia’s news media landscape. This envisioned a comprehensive audit of all professional news sources in Australia, including a review of news output and share of consumption, at differing geographic scales, and across print, radio, TV and online.

This proposed framework built on similar news measurement approaches adopted internationally and was informed by consultation with leading researchers and subject-matter experts, both in Australia and abroad.

While initially released as a standalone ‘think piece’, we are now recommencing work on this project, and are seeking public views on both the construction of our news measurement framework and its suitability for use in Australia. Stakeholder feedback from this process will also inform any further ACMA measurement activities and decisions around implementation.

Note: This consultation paper should be read alongside the ACMA’s December 2020 [News in Australia: diversity and localism – News measurement framework](#) paper.

Background

Rationale for measuring the news market

A strong and diverse news media market helps promote pluralism and protect our democratic processes – ensuring Australians have access to a range of sources of news and information, while preventing any single voice from having excessive influence over the news agenda, public opinion and political discourse.

The current media diversity rules, as set by the Australian Parliament and administered by the ACMA, regulate the number of ‘voices’ in a market. This is based on an assessment of the ownership and control of commercial television and radio broadcasting services, as well as any ‘associated newspapers’ operating within these licence areas.

While these rules are often used as a proxy for measuring levels of media diversity, they do not examine other important measures that underpin a diverse media landscape, like the volume of unique news output and consumption. Nor do they account for the impacts of the digital news environment, including the increasingly prominent role played by social media and other digital platforms in our news ecosystem. This omission is notable, given recent ACMA research revealed that 81% of adult Australians accessed news content online, compared to 67% for TV, 39% for radio and 23% for print (in the previous 7 days to June 2022).¹

Measurement is also important for understanding and tracking what news services are available at different localities and geographic scales. Amid ongoing concerns regarding newsroom closures and the sustainability of public interest journalism in Australia, a more comprehensive and regular examination into the state of the news market could help identify gaps in local news provision – particularly in outer metropolitan, regional and rural areas.

Development of the news measurement framework

As part of our ongoing research function, the ACMA is responsible for monitoring and reporting on changes in the media market and associated audience behaviours. This work enables the ACMA to be responsive to the changing expectations of Australian audiences, and to help inform advice to government and policymakers, including on possible amendments to regulatory or legislative frameworks.

The ‘news measurement framework’ was developed in late 2019 as part of a broader ACMA project on the Australian news market. This self-initiated research project sought to explore whether existing community safeguards were working to deliver Australian news and journalistic content in accordance with community expectations and longstanding public policy objectives.

In January 2020, we released the first tranche of our research. This focused on the concepts of impartiality and commercial influence in broadcast news and current affairs content. We sought public views on this research through the release of a discussion paper, [Impartiality and commercial influence in broadcast news](#). These submissions helped inform the ACMA’s current thinking on contemporary news and journalistic content safeguards, as outlined in our 2022 position paper: [What audiences want: Audience expectations for content safeguards](#).

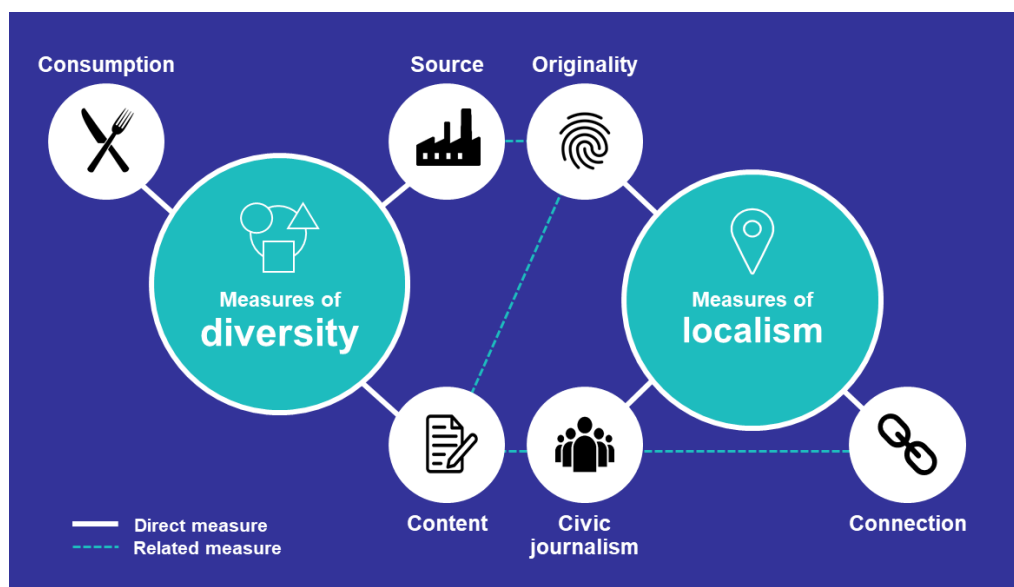
¹ Australian Communications and Media Authority (ACMA), 2022 *Annual Consumer Survey*, ACMA, Australian Government, unpublished.

The second tranche of research was focused on the concepts of diversity and localism. This work sought to better understand how changes in the production, dissemination and consumption of news and opinion have affected both the diversity of news services and availability of local news across Australia. The 'news measurement framework' was the main output of this work, which was informed by various international initiatives including Ofcom's Measurement Framework for Media Plurality, the European Commissions' Media Pluralism Monitor, and the Republic of Korea's model for measuring cross-media influence on public opinion.

The news measurement framework identified key measures or focus areas that the ACMA considered to be necessary for a robust examination of diversity and localism within the contemporary Australian news market, including:

- > source diversity (a diverse range of media sources and voices)
- > content diversity (a diverse range of information and viewpoints)
- > consumption diversity (a diverse range of consumption habits)
- > level of connection (news specifically relating to a locality)
- > level of originality (unique news stories)
- > level of civic journalism (news of public significance).

Figure 1: Proposed measures of diversity and localism



In addition to these key measures, the paper also outlined 8 indicators that would make up the primary structure of the framework, as well as proposing several possible outputs of the research, and options for its implementation. A detailed overview of the indicators is provided at Appendix A.

We had originally planned to consult on the news measurement framework during the first half of 2020, ahead of potential implementation later that year. However, further work was paused in March 2020 due to a re-prioritisation of ACMA activities in response to the COVID-19 pandemic.

Although no further work on this project was undertaken throughout 2020, we chose to release our news measurement framework and associated research 'as is' in

December 2020. This was to help inform the Parliament's media diversity inquiry², as well as to prompt a broader discussion among Australian researchers and policymakers on alternative ways media diversity might be measured in the future. At the time, we noted that the research represented our views as of March 2020, and that further consultation and review of the methodology would be required before we could resume this project.

Other relevant developments

Since the development of the framework, the sector has continued to evolve and adapt in response to ongoing digital disruption and other external factors, including the onset of the COVID-19 pandemic and the corresponding steep – albeit temporary – decline in advertising revenue. There have also been several new public interventions designed to support the sector throughout this period, as well as new sources of research and data that could help inform the implementation of a news measurement framework.

One of the most directly relevant developments comes from the Public Interest Journalism Initiative (PIJI). PIJI is a non-partisan think-tank that undertakes advocacy and research designed to inform public policy and promote the importance of sustainable public interest journalism in Australia.

Following the completion of the ACMA's original research, PIJI launched a series of data projects to help monitor and visualise changes in the Australian news market, including via the publication of an online map that tracks changes in news production. Data from this project suggests news output in Australia has decreased rapidly since the beginning of the COVID-19 pandemic, with 286 contractions to news production between March 2020 to October 2022 (partially offset by 145 news expansions).³

PIJI news measurement projects

[The Australian Newsroom Mapping Project](#) (ANMP) is an online tool that plots Australian news production according to their locations, coverage geographies and the characteristics of each business. Changes to news sources are actively monitored, with PIJI publishing monthly reports and data updates. This enables PIJI to track contractions and expansions in news production and availability within Australia over time, including at a local level.

The [Australian News Index](#) (ANI) underpins the ANMP visualisations, and provides a searchable database of state/territory, national and non-geographic news producers.

The [Australian News Sampling Project](#) (ANSP) assesses news output by specific geographic location/s to understand the local character and quantity of public interest journalism production. It has been designed to examine and contrast the volume and frequency of locally relevant news content at an individual community level. The ANSP is currently in its pilot phase and PIJI has reported on the outcome of its survey work in the Southern Grampians Shire (Vic) and Maranoa (Qld).

In addition to the work of PIJI, we are aware of several other domestic and international research and measurement projects that may also be relevant to the ongoing news diversity work of the ACMA. These include the University of Technology

² See ACMA's December 2020 [submission](#) to the Senate Environment and Communications References Committee's Inquiry into media diversity in Australia. We also referred to this paper in our January 2022 [submission](#) to the House of Representatives Standing Committee on Communications and the Arts' Inquiry into Australia's regional newspapers.

³ Public Interest Journalism Initiative (PIJI), [Australian Newsroom Mapping Project](#) [website], accessed 2 November 2022.

Sydney's [Media Pluralism Research Project](#) and [Regional news media project](#), the European Commission's [Study on media plurality and diversity online](#), and the Social Sciences and Humanities Research Council of Canada's [Global Media and Internet Concentration \(GMIC\) Project](#). Lessons from these and other similar research projects could help inform the final design of the news measurement framework. Additionally, existing data holdings from PIJI and other research organisations could assist in populating the framework and reduce the need for new, ad hoc measurement activities to be undertaken by the ACMA.

Since 2020, there has also been a range of government interventions designed to help support the industry, including in response to COVID-19 pandemic-related pressures. These include [temporary tax and short-term red tape relief](#), grants to support the [production of public interest journalism](#), grants to support the [increasing printing cost for print publishers](#), and the development and passage of the [News Media and Digital Platforms Mandatory Bargaining Code](#).⁴ A comprehensive news measurement approach may be able to help assess the long-term effectiveness of these types of interventions in the future.

More recently, the government has committed to the development of a News Media Assistance Program (News MAP) to secure the evidence base needed to inform policy interventions and develop measures that support public interest journalism and media diversity. This program of work is being led by the Department of Infrastructure, Transport, Regional Development, Communications and the Arts (DITRDCA).

The News MAP will establish a principle-based and evidence-informed policy framework to guide future implementation of news media support measures in a systematic manner.⁵ The development process will examine ways to improve the scope and integration of current data relating to news availability and diversity, and evaluation of the impact of government interventions. The ACMA's work on the news measurement framework is expected to inform development of the News MAP throughout 2023. DITRDCA will consult on the News MAP framework in early 2023.

Next steps

In line with the News MAP and its objective to build a stronger evidence base to support government interventions, the government has requested the ACMA to revisit and update our work on the news measurement framework.⁶

As part of the recommencement of this work, and any possible further measurement activities, we are seeking public views on the model that we proposed in our December 2020 paper. This consultation seeks to ensure the framework is feasible, fit-for-purpose, non-duplicative, and would provide value to government and broader community.

⁴ As part of the ACMA's role in assessing and registering news businesses under the News Media and Digital Platforms Mandatory Bargaining Code, the ACMA maintains a [public register of eligible news businesses](#) that have applied and been registered under this scheme. This may serve as an additional – albeit limited – source of new information on sources of public interest journalism under the news measurement framework.

⁵ The Hon Michelle Rowland MP, [Media Policy: Priorities for a New Government](#), speech to the Seminar Communications and Media Law Association (CAMLA) and International Institute of Communications (IIC) Australian Chapter, 14 November 2022; The Honourable Catherine King MP and The Honourable Kristy McBain MP, [Regional Ministerial Budget Statement October 2022-23: Investing in Our Regions with Purpose and Integrity](#), Department of Infrastructure, Transport, Regional Development, Communications and the Arts, October 2022, accessed 19 December 2022, p. 179.

⁶ The Hon Michelle Rowland MP, [First step towards news measurement framework for the digital era](#) [media release], Australian Government, 14 November 2022, accessed 19 December 2022.

Issues for comment

We welcome any comments from stakeholders on issues relevant to the design or implementation of our proposed news measurement framework. We are particularly interested in stakeholder views on the issues and questions outlined below.

Scope of the news measurement framework

The ACMA's news measurement framework was designed as a tool to help assess whether the public policy objectives of media diversity and localism were being met.

1. Do you consider the framework, as outlined in the [paper](#), would be an effective tool in measuring and tracking levels of media diversity in Australia?
2. Do you consider the framework, as outlined in the [paper](#), would be an effective tool in measuring and tracking the health of local news in Australia?

As detailed in our December 2020 paper, we proposed restricting the scope of our examination of the news market to 'professional' sources of news that can show a level of connection to Australia. This would include digital news sites, podcasts, and the social media presence of media outlets, but exclude sources of participatory journalism like personal blogs and community-run forums, as well as news from organisations without sufficient editorial independence, like advocacy groups.

We also proposed excluding certain categories that, while important components of a diverse news environment (like standpoint diversity and having low barriers to news access), are not easily able to be measured and could constitute scope creep.

3. Do you agree with the proposed scope of the news market?
4. Do you agree with the proposed key measures of diversity and localism?
5. Would you recommend any additions or changes to the proposed framework and/or its underlying key indicators?
6. Do you have views on whether the framework adequately considers the impact of social media and other digital platforms on media diversity, or if new or alternative measurement approaches are required?

Existing data and research

As discussed above, we are aware of several new sources of research and data that are relevant to our examination of the Australian news market and could serve as a direct input into the news measurement framework.

PIJI's research provides a particularly valuable source of public data, and its various projects closely align with the outputs that we originally proposed in our news measurement paper, such as the development of a local news database and online map, and a local news assessment.

We are currently working with DITRDCA to explore the data sources it has developed to support the News MAP and other programs, and are also aware that the Australian Competition and Consumer Commission (ACCC) holds commercial data on Australian news organisations that it obtained as part of its Digital Platforms Inquiry. However, we understand that some of this data may be out of date, and that agencies may be unable to share certain data with the ACMA due to commercial or legislative restrictions.

7. Is there any additional third-party research or data that could be relevant to help inform the final design and/or implementation of the ACMA's news measurement framework?
8. Should the ACMA seek to incorporate and build on existing third-party data when implementing its news measurement framework?
9. Are there any restrictions or barriers to the acquisition, sharing or use of proposed third-party research or data that we should be aware of?

Further measurement activities

The ACMA originally outlined a series of potential measurement activities that we considered would be necessary to populate our news measurement framework, such as a news audit and content analysis exercise. Due to work conducted since the release of our December 2020 paper, some of these foundational activities may no longer be required.

Instead, we could focus on specific known data gaps in areas where we may be best placed to either undertake measurement activities or request data directly from industry. Once these data gaps are identified and prioritised, small-scale pilot projects could be undertaken to test the efficacy of the framework and the feasibility of its full-scale rollout.

One such area could be an examination into the number of active journalists operating in Australia. Another could be focused on which news sources are most consumed by, and have the greatest impact on, Australians. As noted in our December 2020 paper, some of this data could be obtained from a national survey. In 2022, for the first time, we asked Australians about their general news consumption habits as part of our longstanding annual consumer survey. In 2023, we could look to expand these areas to include questions about consumption, trust and reliance on individual sources of news across platform types. This data could be supplemented with third-party sources of cross-media consumption or ratings data, from companies like OzTAM, IAB, Nielsen or Roy Morgan.

Alternatively, to reduce duplication, we could seek to partner with researchers or other organisations that are already collecting similar data or examining these issues in more detail. This could include, for example, the ACMA contributing resources towards more news content analysis sampling in regional localities.

10. What are the most significant outstanding data gaps, and how should these be prioritised?
11. Do you have views on potential pilot projects that the ACMA could undertake in 2023? What should be the ACMA's ongoing role in relation to these news measurement activities?
12. Are there opportunities for the ACMA to collaborate with research organisations to help implement the news measurement framework?
13. Are there any current or emerging technologies that could be considered by the ACMA to assist in content analysis or to help implement other aspects of the news measurement framework?

Invitation to comment

Making a submission

We invite comments on the issues set out in this paper.

- > [Online submissions](#) can be made by uploading a document. Submissions in PDF or Microsoft Word are preferred.
- > Submissions by post can be sent to:
The Manager
Content and Platform Projects Section
Australian Communications and Media Authority
PO Box 13112, Law Courts
Melbourne VIC 8010

The closing date for submissions is COB, **Friday 17 March 2023**.

Consultation enquiries can be emailed to haveyoursay@acma.gov.au.

Publication of submissions

We publish submissions on our website, including personal information (such as names and contact details), except for information that you have claimed (and we have accepted) is confidential.

Confidential information will not be published or otherwise released unless required or authorised by law.

Privacy

[Publication of submissions](#) provides information about the ACMA's collection of personal information during consultation and how we handle that information.

Information on the *Privacy Act 1988* and our privacy policy (including how to access or correct personal information, how to make a privacy complaint and how we will deal with the complaint) is available at acma.gov.au/privacy-policy.

Appendix A: News measurement indicators

	Indicator/measures	Framing question	Metric(s)	Scale	Methodology	Rationale and treatment	Comments
News infrastructure	1. Availability of sources > Source diversity > Connection	How many sources of news and opinion are available to Australians?	Count of all professional news outlets operating in Australia by: > media platform > place of publication/broadcast > frequency of reporting > pricing strategy > target audience, by geography.	National State Local	> Search commercial media databases and government registers. > Request information directly from media outlets. > Crowd-source missing information via online news map (optional).	Data would be required to establish a 'diversity baseline', deliver a local news database, and enable direct comparison of news infrastructure at a local level. Tracking this indicator over time would allow for longitudinal assessment of source diversity.	Given the vast quantities of news content available online, this indicator would not capture data from international sources (highly consumed or impactful international sources of news could instead be captured and assessed through indicators #7 and #8). News availability could inform other indicators, including the identification of local news outlets for content analysis, and could assist in a future research on news impact and engagement (e.g., understanding the impact of paywalls).
	2. Availability of journalists > Source diversity > Originality > Connection	How many journalists contribute to the production of local news?	Count of journalists and editors employed by professional news outlets operating in Australia (if available, split by full-time, part-time and casual).	Local	> Search commercial media databases and contact lists. > Request information directly from media outlets. > Validate against ABS statistics.	Results could be compared between localities. Data could enable the ACMA to assess the extent to which the number of journalists impacts on journalistic output in a locality (e.g., as an independent variable in regression analysis).	This approach would not provide a definitive count of journalists in a locality, as it would not capture freelancers or those employed by non-media outlets. Data collection could also be difficult due to definitional issues and greater sharing of resources between and within newsrooms. Due to these limitations, data on journalists would only be captured and assessed at a local level.
	3. Number of owners > Source diversity	How many people exercise control over Australia's most influential sources of news?	> Count of the number of media network owners (and, if available, controllers) of the most popular and impactful professional news outlets across media platforms. > Count of the number of media networks owners (and, if available, controllers) of local news outlets in sample localities.	National State Local	> Survey consumers about what news sources they consume and group by company. > Search media registers and undertake desktop research to identify owners. > Request information directly from media outlets.	Key metric that could inform assessment of media ownership and control. Where available, this could be included in a news diversity baseline and local news database.	Information could be difficult to ascertain for non-public companies and outlets without disclosure obligations (e.g., print, online).
News output	4. Range of topics > Content diversity > Originality	How much variety is present in Australia's news media market?	> Count of articles, by category or news topic. > Count of 'hard' articles, as a % of total news output.	Local State (optional)	> Collect sample of news sources from local media outlets. > Code articles according to topic and whether hard or soft news. > Compare results against a sample of national news sources (optional).	Results could be compared between platforms and localities, as a measure of content (information) diversity. As part of this assessment, the ACMA could test whether there is a relationship between source diversity (indicator #1) and content diversity measures (indicators #4 and #5). Data on news articles by topic could also support an assessment of the availability of public interest	This indicator could allow ACMA to look at the mix between hard (e.g., local government, health, education) and soft (e.g., arts and culture, human interest, weather) news in local markets. As part of the coding process, the ACCC definition and list of 'public interest journalism' topics could be adopted, coupled with more community-focused topics, in line with the dual objectives of local content.

Indicator/measures	Framing question	Metric(s)	Scale	Methodology	Rationale and treatment	Comments
					journalism, including identifying any particular areas of concern.	
5. Range of viewpoints > Content diversity > Civic journalism	How many viewpoints are presented in Australia's news media market?	Average number of sources quoted or interviewed in news articles.	Local State (optional)	> Collect sample of news sources from local media outlets. > Code articles according to the number of quotes sources. > Average by locality and platform. > Compare results against a sample of national news sources (optional).	Results could be compared between platforms and localities, as a potential measure of content (viewpoint) diversity. As part of this assessment, the ACMA could seek to test whether there is a relationship between source diversity (indicator #1) and content diversity measures (indicators #4 and #5).	Viewpoint diversity is about exposure to multiple perspectives or ideas, which are essential to a well-functioning pluralistic society. While a count of sources is a relatively simplistic measure, this could be an achievable and appropriate proxy for viewpoint diversity as part of a broader examination of content diversity.
6. Local relevance > Content diversity > Connection > Originality	To what extent does local news cover matters of local significance?	> Count of news articles with a direct 'connection' to the local area. > Count of original news stories as a % of total news output.	Local	> Collect sample of news sources from local media outlets. > Code sample according to whether articles relate to locality.	Results could be compared between localities and platforms, as a measure of localism. Data on which localities have higher levels of genuine and original local news output would enable the identification of areas of concern and help with assessing what factors may contribute to local news production.	An assessment of what constitutes 'local' should be based on existing legislative definitions under the BSA and related legislative instruments. Originality assessment should be based on the presence of a by-line by local journalist or evidence of local production.
News engagement 7. Consumption > Consumption diversity > Civic journalism	What are the most consumed sources of news in Australia?	List of most popular cross-media sources of news by: > audience size > frequency of use (including international sources).	National State	> Survey consumers about what news sources they consume, and how often. > Combine use and frequency data to determine 'share of reference'. > Validate against commercial ratings and circulation data.	Data could help inform examination and baselining of media diversity levels in the context of cross-media consumption.	Adopts Ofcom's bespoke 'share of references' metric for assessing cross-media consumption, using a consistent methodology and definition of news. Although consumption would not be measured at a local level, this type of survey sampling could be designed to allow for comparison between 'geotypes' (metro, regional and rural localities).
8. Impact > Consumption diversity > Civic journalism > Connection	What are the most impactful sources of news in Australia?	List of most popular cross-media sources of news by stated reliance or personal importance (including international sources).	National State	> Survey consumers about which news sources they consider high quality, rely on, and trust. > Supplement with qualitative research and detailed examination of news engagement via social media (optional).	The list of most impactful sources of news could be compared against the list of the most consumed sources of news (from indicator #7) to provide insights into the relationship between news consumption and influence in the Australian news market.	Adopts the Ofcom model, where impact is assessed through a range of proxies collected via consumer research. Additional data on the sharing of online news content, coupled with qualitative research, may be necessary to supplement quantitative research given concerns around passive news consumption, media literacy and access.