Australian Government

Australian Communications and Media Authority

News media in Australia

2025 report

March 2025

Notice about data in this report

A data quality issue relating to the ABC and SBS was identified in chapter 4 (Indicator 1: groups, owners and controllers) and chapter 6 (Indicator 3: professional news outlets) of this report. The issue was addressed in May 2026 through updates to the Indicator 1 and Indicator 3 interactive data reports, which contain the most current information on the count and composition of media brands and news outlets for the ABC and SBS.

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Acknowledgement of Country

The Australian Communications and Media Authority acknowledges First Nations peoples as the Traditional Owners and Custodians of Australia.

We respect and celebrate First Nations peoples as the original storytellers and content creators of the lands on which we work, and honour the enduring strength and commitment of Aboriginal and Torres Strait Islander peoples to the land, waters and their communities. We pay our respects to Elders past and present.

We acknowledge the Traditional Owners and Custodians of the many lands on which this report was created. We acknowledge the time and expertise of First Nations people who have contributed to its creation.

Readers of this report are advised that it may contain names of deceased persons.

Artwork from *Connected and United* © Amy Allerton

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Executive summary

Australia's news media landscape is evolving, and the measurement of media diversity is an important tool to inform decision-making

Media diversity and public interest journalism are integral to supporting pluralism and democracy. News plays a critical role in informing citizens, particularly in times of crisis or emergency. It is also integral to promoting transparency and accountability of government and institutions, supporting social cohesion and resilience, and encouraging informed democratic discussion and electoral participation. Australian audiences require access to reliable, accurate and independent information on matters that affect them to participate in an open, informed and inclusive society.

Media diversity policies are designed to encourage the production and distribution of a wide range of news, information and viewpoints across media markets. These policies seek to provide better outcomes for Australian audiences, communities, and society more broadly. Measuring the diversity of our news media market is essential to informing evidence-based policy interventions and regulatory settings.

While there is no consensus on the optimal or 'correct' amount of news media diversity, a comprehensive and regular assessment of levels of media diversity offers benefits to industry, government and the ACMA. Up to date information about the characteristics of news production and news consumption across different markets and demographics can assist to inform business and policy decisions. This is particularly relevant as the Australian news industry is operating in an increasingly complex and dynamic media landscape.

From a regulator perspective, media diversity assessments enable the ACMA to monitor and report on industry changes, assess regulatory gaps and emerging risks, and advise government on technological and market trends. It also allows the ACMA to consider how these emerging market trends are impacting the Australian public.

The current regulatory framework does not provide a complete picture of Australia's news diversity

Australia's current regulatory landscape measures media diversity via a count of the number of independent media 'voices' in a market.[1] Rules set out in the *Broadcasting Services Act 1992*, and administered by the ACMA, require each market to have a minimum number of voices. However, this is solely 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 'markets'.[2]

1 A 'voice' is a commercial television broadcasting licence, a commercial radio broadcasting licence or a newspaper that is associated with a commercial radio broadcasting licence area (a 'media operation'), or a group of two or more media operations (a 'media group'). An ungrouped media operation and a separate media group each count for one 'point' under the 'minimum voices rule.

2 An 'associated newspaper' for the purposes of the media diversity rules under the BSA is one that that is linked in terms of circulation within the relevant commercial radio broadcasting licence area. A newspaper is associated with a commercial radio broadcasting licence area if more than 50% of its circulation is within the relevant licence area and the newspaper's circulation covers at least 2% of the licence area's population. Most small community papers do not meet this threshold. This also excludes the national newspapers.

While these rules serve as one proxy for levels of media concentration and diversity, they do not examine other important measures of a diverse media landscape, such as the role of online distribution platforms (both established and emerging), the increased availability of international news sources, or audience consumption patterns. 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 shaping the news ecosystem.

Historically, there has been no overarching framework to establish benchmarks, monitor trends or connect disparate activities and their impacts. While in recent years we have seen considerable growth in publicly available data on various aspects of the Australian news market, there is still no single source that provides a holistic view of media diversity in Australia.

The ACMA has developed a new framework and regular reporting series to measure news media diversity

Informed by research and consultations over several years, the ACMA has developed the Media Diversity Measurement Framework (the Framework) to examine Australia's news media market in relation to:

- source diversity – the extent to which news media markets are populated by a diverse array of content producers and publishers
- content diversity – the extent to which news presents different voices, viewpoints, and demographic profiles
- exposure diversity – the extent to which audiences consume a diverse array of news.

The objective of the Framework is to provide a richer and deeper analysis of the news media environment than currently available to inform government, industry and the public on a regular basis of the shape of media diversity in Australia.

The ACMA will report against the Framework through the biennial series, *News media in Australia.* This ongoing series will provide an opportunity to examine and update the Framework, identify new sources of data and research, and examine data or information gaps.

This is the first report and iteration of the Framework. The 2024 Framework comprises 6 key indicators:

1. groups, owners and controllers
2. professional news workforce
3. professional news outlets
4. range and variety of news content
5. news consumption
6. trust and impact.

This report draws on existing ACMA and third-party data sources

The 2024 Framework is primarily based on existing data collected by the ACMA as part of our regulatory functions and through our annual consumer survey. In 2024, the survey included additional questions on news consumption to inform this report.

The report also draws on a range of external data sources, including the Public Interest Journalism Initiative's Australian News Data Project, the Reuters Institute for the Study of Journalism's Digital News Report and Census data published by the Australian Bureau of Statistics. We acknowledge the assistance of these organisations in developing this report.

To complement this written report, we have developed a suite of interactive data reports providing customisable visualisations of the data, available on the ACMA website.

There are limitations to currently available data, which need to be addressed to allow a fuller consideration of media diversity in Australia

While access to existing ACMA and external data has supported the development of this first report, it has also highlighted significant gaps and limitations in existing data that is needed to establish a comprehensive picture of news media diversity in Australia.

Some of these gaps stem from the discrepancy between the relatively narrow scope of the ACMA's regulatory remit (primarily broadcast media), and corresponding datasets, compared to the prevalence and popularity of other news sources (particularly online) where data is not readily available. Limitations also arise due to methodological issues, including inconsistencies in how data is collected across multiple sources, for other bespoke purposes.

As a result, we are unable to make definitive findings and have instead provided insights.

We will work to improve existing datasets and commission research to address identified gaps and limitations. The framework itself will also be reviewed and refined over time, leading to a more comprehensive and cohesive evidence base. We will continue to consult stakeholders to inform this work.

In acknowledging our inability to make definitive findings in this report, we have included several case studies (developed in consultation with relevant stakeholders) to illustrate emerging issues and some limitations of the 2024 Framework and existing data.

Below we highlight some key insights in this report.

The professional Australian news market is highly networked

The Australian news market is highly networked, with 69% of the 1,818 news brands identified by the ACMA belonging to one of 106 networks. The 10 largest networks account for around 9% of the networks identified but own 62% (780) of networked brands, or 43% of all news brands. Data from the ACMA annual consumer survey indicates that, unsurprisingly, this often translates to a greater share of attention (that is, the amount of time someone spends accessing one source of news relative to their other sources) compared to smaller networks or independent brands.

While many of these brands have been assigned to a network based on a common owner, ownership is only one of several ways individuals and entities may exert control. Comprehensive data on who is in a position to control professional news outlets is only available for the approximately 12% of outlets that are subject to the media control rules administered by the ACMA.

News websites and apps are the most prevalent type of news outlet, but are not covered by the ACMA's regulatory remit

In total, we identified 2,864 professional news outlets. Australia has more news website/app outlets (1,113) than any other type of news outlet, while New South Wales has the most outlets overall (31%) and the Northern Territory the highest proportion of outlets (5%) relative to population (1% of the Australian population).

As set out above, the focus of the ACMA's regulatory remit on traditional broadcast news means available data on other types of news outlets (such as news website/app outlets) is limited. For example, the ACMA's regulatory remit only applies to the content of 35% of professional news outlets identified under the 2024 Framework.

The ACMA will seek additional datasets to enable insights into other news media outlets for future reports.

The number of journalists in Australia is decreasing

The number of people for whom journalism is their primary job decreased by 19% from 2011 to 2021, while journalism job advertisements decreased most from 2016 onwards.

Journalists are also increasingly working outside of traditional reporting roles, reflecting the rapidly changing nature of the profession. This includes the widespread digitisation of journalism and growing need for those with journalism skills to engage in professional activities outside of the newsroom.

The exception to the reported decrease in the number of people for whom journalism is their primary job was growth in the 'Journalists and other writers: not further defined' subcategory, which increased by 40% from 2011 to 2021. This is likely due to more journalists working outside traditional reporting roles on major platforms.

A high proportion of news articles produced in Australia contain public interest journalism

Of the 15,644 news articles sampled by the Public Interest Journalism Initiative between 2022 and 2024, a high proportion (80%) were assessed as containing 'public interest journalism'. Of these, the most common categories were 'community' and 'government', which were more prevalent than articles on 'public services' or 'courts and crime'.

Articles sampled in the Northern Territory contained a lower proportion of public interest journalism (64%) compared to other states and territories (between 78% and 83%). Articles sampled in regional and remote areas contained higher levels of public interest journalism on average, compared to those sampled in major cities.

News consumption is decreasing in Australia

The proportion of Australian adults who consume news is decreasing. In 2024, the proportion of Australians who did not access news at all in the week before the survey increased to 9% from 5% in 2023. Of those Australians who accessed news, they also used fewer platforms – 2.9, down from 3.1 in 2023.

This is particularly pronounced for young Australians, with 18 to 34-year-olds more likely than any other age group to have not accessed any news (15%). Women were also more likely than men to not access news (10%).

Australians are most likely to access news via free-to-air TV and news websites/apps

Free-to-air TV and online news websites or apps (news websites/apps) continue to be the most popular platforms used to access news (for the third year in a row) with 50% of Australian adults accessing free-to-air TV for news and 46% accessing news websites/apps.

Consumption of news via social media and communication websites and apps continues to be the most popular way to access news among younger Australians, with 60% of those aged 18 to 34 accessing news this way in the week before the survey. There has been an increase since 2023 in the proportion of Australian adults using social media and communication websites/apps to access news that comes from trusted professionals on personal accounts, strangers and celebrities/social influencers.

Share of audience attention is spread across traditional news brands and digital platforms, with differences for younger and older Australians

Share of attention refers to how much time a person spends accessing one news source relative to their other sources of news. Together with reliance, it is used in this report as a measure of potential audience impact.

The ABC holds the greatest share of audience attention for traditional news brands, while Meta and Alphabet (Google) hold the greatest share of audience attention for digital platforms.

The ABC brand holds a greater share of older Australians' attention (aged 45 and over) compared to younger Australians (aged 18 to 44), while Meta and Alphabet hold a greater share of younger Australians' attention than of those aged 45 and over.

The news brands and digital platforms that hold the greatest share of audience attention in Australia are also heavily relied on

Australians' reliance on certain news outlets is used in this report, together with share of attention, as a measure of potential audience impact.

ABC news outlets are the most relied on for accessing news via free-to-air TV and catch-up streaming services, radio (AM/FM/DAB+ and via the internet), podcasts and news website/apps. Facebook is the most relied on social media and communication website/app for accessing news, while Google Search is the most relied on online search engine, and Google News is the most relied on online news aggregator.

This points to a degree of alignment between share of attention and reliance. While not entirely unexpected, it suggests that the news brands and digital platforms that are most relied on and have a large share of attention likely have the most impact on Australian audiences.

Australians' trust in news is declining

Overall, distrust in news is increasing and trust in news is declining. For those who do retain trust in news, the SBS and the ABC are rated the most trustworthy news brands.

Common factors that influence Australians' perceptions of trustworthiness in news include journalistic standards and transparency of the outlet's editorial process.

Australia has a dynamic and robust news landscape, but some areas need further consideration

This first *News media in Australia* report highlights some of the challenges facing news media diversity in Australia in relation to source, content and exposure diversity. It reveals aspects of a dynamic and robust news landscape, as well as areas in need of further examination.

It is evident that changing audience habits, the allocation of advertising revenues across an increasing number of platforms and websites, and the relationships between news and online platforms are impacting news production and consumption. Many news businesses have seized opportunities presented by the digital environment to date. However, the continued evolution of technology, distribution platforms for news, government regulation and consumption trends will have a significant impact on future opportunities for news outlets and groups, and news media diversity in Australia.

The ACMA will strengthen future reporting by exploring new research opportunities to address data limitations and expand the Framework over time

The *News media in Australia* series has an important role to play in informing evidence-based policy in relation to public interest journalism and media diversity. While this report offers some initial insights, the Framework is intended to be iterative and expanded over time to provide more comprehensive insights into the diversity of Australia's news media landscape.

We will now seek to strengthen the data used to inform the 6 existing indicators and assess opportunities to broaden the scope of the future iterations of the Framework, including through the consideration of new research. We intend that this report will lay the groundwork for further consultation and collaboration to address current gaps and explore new directions for the Framework.

While the next *News media in Australia* report is intended for release in 2 years, the ACMA intends to regularly update existing data and release new research as it becomes available. We look forward to building on the 2024 Framework and contributing to a robust, sustainable and diverse news media landscape that can benefit all sections of Australian society.

1.

Setting the scene: media diversity in Australia

Existing regulatory and policy settings in Australia's media diversity landscape

Australia's media diversity policies are designed to encourage the production and distribution of a wide range of news, information and viewpoints across the media market, while preventing any single voice from exerting undue influence over public discourse.

The Australian Government's underlying rationale in seeking to protect and promote media diversity relates to the critical role of the media (particularly news outlets) in informing citizens, reporting on institutions and their actions, supporting community cohesion, and contributing to a well-functioning, pluralistic democracy.

Recognising the importance of media diversity to an open, informed, and inclusive society, Australia has a range of mechanisms in place to support media diversity and journalistic integrity.

The *Broadcasting Services Act 1992*

Media diversity is explicitly recognised among the objects of the *Broadcasting Services Act 1992* (BSA)*.* [3] To achieve this, the BSA places limits on the control of licensed commercial broadcasting services and associated newspapers.[4] This is based on the assumption that the media services that exercise the greatest level of influence on the community, in terms of news and public opinion, should be regulated at a higher level than less influential services. The ACMA oversees these regulatory settings, including:

- advising parties on their disclosure and notification requirements
- maintaining media ownership and control registers
- investigating alleged breaches of the media diversity rules and broadcasting codes.

The BSA also imposes obligations on regional commercial radio broadcasting licensees to maintain a 'local presence' and report levels of local material in their licence areas where they are subject to a change in control known as a 'trigger event'. Although these rules do not form part of the primary control rules in the BSA, they do use a modified version of a change in control as the 'trigger' for the additional localism obligations.[5]

3 s.3(a),3(c),3(e), *Broadcasting Services Act 1992.*
4 s.53, 54, 61AB, *Broadcasting Services Act 1992.*
5 The then Department of Communications, *Media control and ownership Policy Background Paper No. 3,* June 2014, accessed 24 October 2024.

Australia's primary media control rules

'1-to-a-market' TV rule: A person must not be in a position to exercise control of more than one commercial TV broadcast licence in a licence area.

'2-to-a-market' radio rule: A person must not be able to exercise control of more than 2 commercial radio broadcast licences in a licence area.

Similar rules apply for directorships.

'5/4' rule (the 'minimum voices' rule): As a constraint on mergers and acquisitions, at least 5 independent media 'voices' must be present in metropolitan commercial radio licence areas (the mainland state capitals), and at least 4 in regional commercial radio licence areas.

There are exceptions to these rules. For example, in licence areas where there is only one commercial TV broadcasting licence, that licensee may be allowed to provide a second service or in licence areas where there are 2 commercial TV broadcasting licences, those licensees may be allowed to provide a third commercial TV broadcasting service. The BSA's control rules do not apply to broadcasting licences allocated under section 38C or section 40 of the BSA.

Broadcasting codes of practice

Diversity measures also feature in several broadcasting codes of practice developed by industry groups in consultation with the ACMA. For example, measures to ensure that commercial radio stations provide reasonable opportunities for significant alternative viewpoints to be presented when dealing with controversial issues of public importance – if the issue has immediate relevance to the community.[6] Also, measures to ensure that community radio stations' news, current affairs programs and interviews provide access to views not adequately represented by other broadcasting sectors.[7]

News Media and Digital Platforms Mandatory Bargaining Code

The News Media and Digital Platforms Mandatory Bargaining Code (the Bargaining Code) commenced in March 2021 following the passage of the *Treasury Laws Amendment (News Media and Digital Platforms Mandatory Bargaining Code) Act 2021*. The Bargaining Code seeks to address bargaining power imbalances between digital platforms, such as Meta and Google, and Australian news businesses, by enabling eligible news businesses to bargain individually or collectively with digital platforms over payment to include their news content on these platforms and services. The code is intended to help support the sustainability of public interest journalism in Australia.[8]

Digital platforms must participate in the Bargaining Code if the Treasurer makes a determination specifying that the Bargaining Code applies to them. The determination process is detailed in section 52E of the Bargaining Code. This process is known as designation. To date, no digital platform has been designated, with commercial deals agreed between some digital platforms and news media organisations outside of Bargaining Code process.

In December 2024, the government announced that it will establish the News Bargaining Incentive. The incentive is intended to encourage large digital platforms to enter into or renew commercial deals with news publishers. It is envisaged that a charge will be applied to those platforms that do not enter or renew commercial agreements with news publishers. The charge

6 Code 3.9, *Commercial Radio Code of Practice* (2017).
7 Code 3.6, *Community Radio Broadcasting Codes of Practice* (2008).
8 'Explanatory Memorandum', *Treasury Laws Amendment (News Media and Digital Platforms Mandatory Bargaining Code) Bill 2021,* accessed 15 October 2024.

will be able to be offset for those platforms that do enter agreements with a news publisher. Consultation on the incentive is expected to take place in early 2025.

As the first piece of legislation created to directly address the relationship between digital platforms and Australian news businesses, the Bargaining Code is an important aspect of the context in which the Media Diversity Measurement Framework has emerged. As will be explored in this report, the impact of digital platforms on media diversity has been significant in Australia.

Administration of news business registrations

While no digital platform has yet been designated by the Treasurer, and the bargaining aspects of the Bargaining Code are not yet activated, news businesses are still able to register.

On 3 March 2021, the ACMA began accepting applications under the Bargaining Code and determining the eligibility of news businesses for registration. At the time, the ACMA published the *News media bargaining code – Eligibility guidelines* to help potential applicants determine whether they are eligible to register and to explain the registration tests in the Bargaining Code for applicants as they develop their applications.

The ACMA's role in registering news businesses is to assess whether they meet the eligibility requirements, including whether the primary purpose of each nominated news source is to create core news content. The eligibility criteria in the Bargaining Code do not impose requirements on news businesses to have journalistic staff with certain professional credentials.

The Bargaining Code includes tests to identify whether a news business is eligible for participation:

- Revenue test – indicating that the annual revenue of the news business must exceed $150,000.
- Content test – indicating that the primary purpose of the news business must be to create core news content.
- Australian audience test – indicating that the news business must predominantly operate in Australia for the dominant purpose of serving Australian audiences.
- Connection requirement – requiring the corporation that applies for registration to operate and control the news business it is seeking to register.
- Professional standards test – indicating that the news business must adhere to certain professional journalistic and editorial standards and operates with editorial independence.
- As outlined in chapter 3, the ACMA has drawn on some of these criteria to establish parameters for including news outlets in this initial report on the Framework.

Meta's announcement to cease deals related to the Bargaining Code

On 29 February 2024, Meta announced it would be discontinuing Facebook News from its Facebook service in Australia and the US. Meta's announcement followed similar announcements in the UK, France, Germany and Canada in 2023.

Facebook News was a dedicated tab for news and journalism content, which was first launched in Australia in 2021. This coincided with the launch of the Facebook Australian News Fund, an A$15 million program investing in public interest journalism via its Newsroom Sustainability Fund and Public Interest Journalism Fund.

In 2024 Meta announced that a lack of engagement in Australia, and other international markets such as the US, had led to a decision to discontinue Facebook News.[9]

9 Facebook, 'An Update on Facebook News', 29 February 2024, accessed 22 October 2024.

Meta stated as part of the announcement that it had decided not to enter or renew commercial deals for news content in Australia, and that no new Facebook products would be offered for news publishers in the future. We will continue to monitor developments in this area, including the implementation of the News Bargaining Incentive, in future reports.

The News Media Assistance Program

The Australian Government's News Media Assistance Program (News MAP) is a principlesbased framework to direct support for public interest journalism and media diversity. The News MAP aims to guide decisions around when government intervention is warranted, how it should be applied and where it should be targeted.

The Media Diversity Measurement Framework is intended to support the News MAP by providing a robust, long-term evidence base to help inform government decision making in support of public interest journalism.

In March 2024, the government completed consultation on the News MAP and received over 70 written submissions. Informed by the public consultation, the government released the News MAP Policy Framework. The Policy Framework guides the way forward for government policy interventions for news and journalism. It aims to ensure that interventions are based on the best available evidence and are balanced with the need to maintain the independence of the sector. The Policy Framework outlines the key policy objectives of ensuring access, diversity, press freedom, quality, citizen engagement and representation in Australian news.

In December 2024, the government announced that it is investing in a package of measures to preserve the provision of local news that is vital to Australian communities, and support innovation and resilience for news organisations, including:

- $99.1 million over 3 years from 2025–26 in grants for the news sector
- $33 million over 3 years from 2025–26 to support the financial sustainability of the Australian Associated Press
- a mandated minimum commitment of $3.0 million per year for 2 years from 2025–26 for regional newspaper advertising across the total Commonwealth media advertising spend
- $15 million in 2024–25 for the News Media Relief Program with grants available to eligible regional, independent, suburban, multicultural and First Nations news publishers creating online news content.

To support objectives consistent with the News MAP, an expert advisory panel will be established to provide advice to government on the design and targeting of funding to news organisations.

As part of the News MAP, the government has committed to developing Australia's first national media literacy strategy. The national strategy will establish the key skills and competencies Australians need to navigate the challenges and opportunities presented by the digital world. A 3-year development timeframe will ensure a robust government-led co-design process with the media literacy research and education sectors, as well as communities. The strategy is expected to be completed in 2028.

More information on the News MAP can be found at infrastructure.gov.au/media-communications-arts/news-map.

Relevant inquiries into media diversity

The need for a robust and diverse media landscape has been the subject of numerous national inquiries and initiatives in recent years. A summary of some of the key recent inquiries is set out below.

2019 Digital Platforms Inquiry

In December 2017, the Australian Competition and Consumer Commission (ACCC) was directed to consider the impact of online search engines, social media and digital content aggregators (digital platforms) on competition in the media and advertising services markets.[10] The Inquiry's terms of reference included:

- the extent to which platform service providers are exercising market power in commercial dealings with the creators of journalistic content and advertisers
- the impact of platform service providers on the level of choice and quality of news and journalistic content to consumers
- the impact of platform service providers on media and advertising markets
- the impact of longer-term trends, including innovation and technological change, on competition in media and advertising markets
- the impact of information asymmetry between platform service providers, advertisers and consumers and the effect on competition in media and advertising markets.[11]

A final report of the inquiry was handed down in July 2019, including a chapter dedicated to the discussion of choice and quality of news and journalism. Key findings of this chapter included the:

- benefits of a wide range of high-quality news and journalism to Australian society and democracy
- growing risk of under-provision to Australian news and journalism
- impact of digitisation and the migration of news online to the revenue streams of media businesses, particularly due to a decrease in advertising revenue
- expected influence of digital platforms on the number (increase) of media voices in Australia
- reduced provision of news from metropolitan and national daily newspapers (including the reduction of local content)
- closure of local and regional newspapers
- important role of national broadcasters in producing public interest journalism
- increased risk of exposure to unreliable news and disinformation facilitated via an increased reliance on digital platforms.[12]

The chapter also made recommendations to support the sustainability and diversity of Australian media considering these challenges, including various funding models to support news businesses.

In July 2024, the ACCC published the issues paper for the tenth and final report of the Inquiry. Submissions closed on 23 August 2024 and the ACCC is due to provide its final report to government by 31 March 2025.

10 Australian Competition and Consumer Commission, *Digital platforms inquiry: Final Report*, July 2019, accessed 15 October 2024.
11 Australian Competition and Consumer Commission, *Digital platforms inquiry: Final Report,* July 2019, accessed 15 October 2024, 537.
12 Australian Competition and Consumer Commission, *Digital platforms inquiry: Final Report*, July 2019, accessed 15 October 2024, 280.

2021 Senate Inquiry into Media Diversity in Australia

In November 2020, in the wake of over 500,000 Australians signing a petition calling for the establishment of a royal commission into Australian media, the Senate commenced an inquiry into the state of media diversity, independence and reliability in Australia. The inquiry sought to investigate these issues and their impacts on public interest journalism and democracy, including:

- the current state of public interest journalism in Australia and any barriers to Australian voters' ability to access reliable, accurate and independent news
- the effect of media concentration on democracy in Australia
- the impact of Australia's media ownership laws on media concentration in Australia
- the impact of significant changes to media business models since the advent of online news and barriers to viability and profitability of public interest news services
- the impact of online global platforms such as Facebook, Google and X (formerly Twitter) on the media industry and sharing of news in Australia
- the barriers faced by small, independent and community news outlets in Australia
- the role that a newswire service plays in supporting diverse public interest journalism in Australia
- the state of local, regional and rural media outlets in Australia
- the role of government in supporting a viable and diverse public interest journalism sector in Australia
- any other related matters.

In December 2021, the Senate committee provided its report, which included recommendations to establish a judicial inquiry, with the powers of a royal commission, to determine the suitability of the existing system of media regulation and the concentration of media ownership in Australia and strengthen media diversity in Australia. The report also acknowledged historical efforts to investigate the effectiveness of existing media regulation and ways to strengthen media diversity and the production of quality journalism in a changing media environment, such as the 2011 Independent Inquiry into the Media and Media Regulation.

Responding to these calls for a broader inquiry, the Senate referred the Murdoch Media Inquiry Bill 2023 to the Environment and Communications Legislation Committee in May 2023. The submission period, from June to August 2023, received 25 submissions. A final report of the inquiry was handed down on 10 October 2024.[13]

13 Parliament of Australia, *Media Diversity in Australia: Executive Summary*, 2021, accessed 11 July 2024.

2024 Joint Select Committee on Social Media and Australian Society

Established in May 2024, the Joint Select Committee on Social Media and Australian Society was established to inquire into and report on the influence and impacts of social media on Australian society. The committee's terms of reference noted a number of issues, including:

- proposed aged verification for social media
- the decision of Meta to abandon deals under the Bargaining Code
- the role of public interest journalism, news and public interest media in countering misinformation and disinformation on digital platforms
- the impacts of algorithms and recommender systems and corporate decision making in influencing Australians' consumption and mental health
- other issues in relation to harmful or illegal content disseminated over social media, including scams, age-restricted content, child sexual abuse and violent extremist material.

Submissions for the inquiry closed on 18 June 2024. An interim report from the committee, primarily requesting additional time, was provided in August 2024. The committee's second interim report was then provided in October 2024, and a final report was handed down on 18 November 2024.

2.

Background to the Media Diversity Measurement Framework

Development of the Framework

In 2019, the ACMA began work to explore whether existing settings were working to deliver Australians news in accordance with community expectations and longstanding public policy objectives. We sought to understand how changes in the production, dissemination and consumption of news and opinion have affected both the diversity of news services and the availability of local news across Australia. The development of a draft news diversity measurement framework was the main output of this work.

This draft framework was built on similar news measurement approaches adopted internationally, including the UK's Measurement Framework for Media Plurality, the European Commission's Media Pluralism Monitor, and the Republic of Korea's model for measuring cross-media influence on public opinion. More details about these international approaches are provided below.

This initial framework was also informed by a literature review, qualitative research on consumer attitudes and consultation with leading researchers and subject-matter experts, both in Australia and overseas. It was envisaged the Framework could become an ongoing resource for government and industry that the ACMA and other partners could maintain, expand and adapt over time.

Work on this framework was paused in March 2020 due to re-prioritisation of ACMA activities in response to the COVID-19 pandemic. In December 2020, we published our existing research into news measurement, including a detailed paper titled *News in Australia: diversity and localism – News measurement framework*. The paper sought to provide new insights, as well as to prompt a broader discussion among Australian researchers and policymakers on alternative ways media diversity might be measured in the future.

In December 2020, the ACMA made a submission to the Senate Environment and Communications References Committee's inquiry into Media Diversity in Australia. The submission highlighted the ACMA's recent research into the news environment and the possibility of a new measurement framework to capture levels of diversity and localism across the contemporary Australian news market. As noted in chapter 1, outcomes of the inquiry included recommendations regarding the establishment of a judicial inquiry into media diversity, ownership and regulation, noting that Australia's current media regulatory framework was no longer fit for purpose.[14]

In 2022, the Australian Government announced that it had asked the ACMA to resume work on the Framework, including consultation on its feasibility and implementation. It was intended that this work would inform and support the government's broader News MAP program initiative (see chapter 1), providing a robust evidence base to help inform advice to government and policy makers, including on possible policy, regulatory or programmatic interventions.

This work led to the development of a draft news diversity measurement framework, which was refined following stakeholder consultation and further research. On 12 December 2023, the government announced funding of $10 million over 4 years for the ACMA to implement the Media Diversity Measurement Framework (the Framework).

14 Parliament of Australia, *Senate Inquiry into media diversity in Australia: Report*, 2021, accessed 17 October 2024.

The ACMA is implementing the Framework in 3 phases:

- **Phase 1 (2024–25)**: developing the initial Media Diversity Measurement Framework report, drawing on existing data, including:
  - this written report, providing insights against the 6 indicators that form the first iteration of the Framework
  - a suite of interactive data reports, allowing users to explore data underpinning this written report.
- **Phase 2 (ongoing)**: biennial reporting against the Framework, including reviewing and expanding data sources to address gaps and priorities identified in phase 1.
- **Phase 3 (ongoing)**: reviewing and updating the Framework to maintain and enhance relevance and coverage over time.

A summary of our public consultation process is available on the ACMA website and included at Appendix C.

Comparison with international approaches

The ACMA's 2020 *News in Australia: diversity and localism* series included a review of international comparisons for measuring media diversity. The report found that media markets globally are experiencing significant structural change and that pressures facing Australia's news industry are not unique.

While the ACMA's research did not identify a universally accepted measurement methodology, it included an examination of 5 existing measurement frameworks and research projects that may be relevant to Australia.[15]

United Kingdom (UK)

The UK's Measurement Framework for Media Plurality was developed by the Office of Communication (Ofcom) and finalised in 2015. The framework has 4 key categories:

- availability
- consumption
- impact
- contextual factors.

It combines a series of quantitative and qualitative metrics, including from Ofcom's annual news consumption survey. Recently, Ofcom's development of a 'share of attention' measure has significantly influenced the ACMA's measurement approaches. Based on Andrea Pratt's share of attention model,[16] the measure records the time spent by individuals on a specific news source as a share of their total engagement with all news sources they use. More detail on share of attention and its application to the 2024 Framework can be found in chapter 9.

15 Information provided was current at the time of publication (2020). Information regarding the Republic of Korea's Committee on the Impact of Media Concentration is no longer available online.

16 A Pratt, 'Measuring and Protecting Media Plurality in the Digital Age: A Political Economy Approach', Knight First Amendment Institute at Columbia University, 10 August 2020, accessed 1 October 2024.

Ofcom's work to understand the influence of online intermediaries as gateways to news is expected to inform its current review of public service media in the UK. That review will consider, among other things, the role of public service broadcasters in delivering trusted, impartial and accurate news and how this can be sustained. It will also feed into Ofcom's ongoing assessment of the potential risks posed by online intermediaries and emerging technologies, including generative AI, which is disrupting how news is created, verified, distributed and consumed.

European Union

Across the European Union (EU), the Media Pluralism Monitor (MPM) is an attempt to offer a holistic, risk-based approach to the measurement of media diversity. First established in 2009, the MPM employs an expansive definition of media pluralism across 4 key risk areas:

- basic protection
- market plurality
- political independence
- social inclusiveness.

The MPM draws on detailed surveys completed by a team of academics in each country, identifying growing risks and facilitating a direct comparison between EU member and candidate countries.

Republic of Korea

Established in 2010, South Korea's Committee on the Impact of Media Concentration was tasked with researching and surveying the level of media pluralism and measuring the news media's impact on the formation of public opinion over time, primarily through the lens of news consumption. The committee was set up to include professionals across industry and academia who undertake annual examination of levels of news consumption and influence via a series of indexed measures designed to monitor changes within and across different media sectors.

United States (US)

We identified 3 approaches to measuring media diversity in the US:

- Diversity Index – an analytical tool implemented by the US Federal Communications Commission in 2003. The tool is designed to address the degree of consolidation in local media markets and guide decision making on cross-media ownership and diversity regulation in a changing media environment.
- The Expanding News Desert – a database of over 9,000 newspapers compiled by researchers from the University of North Carolina intended to track key metrics about these publications and identify communities without newspapers or access to information that feeds grassroots democracy. Established in 2004, the study has recently expanded to include 'ghost newspapers', or publications that no longer provide the kind of local news information they once provided, due to shrinking newsroom staff or restructuring and mergers.
- News Media Research Project, a series of local journalism assessment tools developed by researchers from Duke University to help academics and policy makers assess the nature of journalistic content. The project has also produced a scalable measurement model for assessing the availability of local journalism across communities, including whether local journalism is meeting community information needs.

Canada

Established in 2008, Canada's Local News Research Project tracks the closures and mergers of local newspapers, broadcast outlets and online news sites across Canada. In 2016, the Local News Research Project launched an online map that visualised this data, with interactive elements that allow academics, journalists and citizens to add additional information via crowdsourcing tools.

Global Media and Internet Concentration Project [17]

More recently the Social Sciences and Humanities Research Council of Canada funded the Global Media and Internet Concentration Project, which tracks 24 communication, internet and media markets in nearly 40 countries. Bringing together a team of over 50 scholars and non-academic partners, the project applies existing approaches and creates new conceptual and methodological tools to research the trajectory of media concentration over time.

In September 2024, the project released the *Communications, media and internet concentration in Australia, 2019-2022* report, analysing market concentration across 12 telecommunications, internet, media and online service markets in Australia. It found that most of those markets were 'moderately to highly concentrated, with major Australian players like Telstra, News Corp, and public broadcasters dominating traditional sectors, while global tech giants like Alphabet/Google, Meta, Microsoft and Apple dominate core internet services and online advertising'.[18] Ultimately, data reflected 'long-standing media consolidation trends in Australia that are among the highest internationally.'[19]

Relevant findings include:

- there is moderate concentration in the broadcast television sector, with Nine, Seven, ABC and Network 10 as major players
- there is high concentration in the newspaper sector, with News Corp Australia, Nine Entertainment Co, Seven West Media and Australian Community Media dominating
- there is increasing concentration in the radio sector, with Southern Cross Media, ABC, Australian Radio Network and Nova as the major players
- Google and Meta dominate internet advertising, and, by 2022, this dominance had catapulted them into the second and eighth spot, respectively, on the top 20 rankings of largest communication and media enterprises operating in Australia.[20]

As the ACMA Framework develops, we will continue to analyse relevant research that helps to contextualise findings and insights about news media diversity in Australia, and approaches to measurement and monitoring that may inform our own methodology.

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17 Information on the Global Media and Internet Concentration Project was not included in the ACMA's 2020 *News in Australia: diversity and localism* report.

18 T Flew, S Fitzgerald, R Nicholls and C McTernan, *Communications, media and internet concentration in Australia, 2019-2022*, Global Media and Internet Concentration Project, 2024, accessed 18 October 2024.

19 T Flew, S Fitzgerald, R Nicholls and C McTernan, *Communications, media and internet concentration in Australia, 2019-2022*, Global Media and Internet Concentration Project, 2024, accessed 18 October 2024

20 T Flew, S Fitzgerald, R Nicholls and C McTernan, *Communications, media and internet concentration in Australia, 2019-2022*, Global Media and Internet Concentration Project, 2024, accessed 18 October 2024.

3.

The 2024 Media Diversity Measurement Framework

Defining media diversity

The term 'media diversity' has a unique meaning within the Australian regulatory context. While in many other jurisdictions media diversity and media plurality are interchangeable terms, media diversity in Australia has a narrow focus based on the *Broadcasting Services Act 1992* (BSA) rules that place limits on the ownership and control of broadcasting licenses.

The 2024 Framework includes a more holistic and expansive definition of media diversity. This includes an examination of media outlets and their owners (source diversity), media content (content diversity), and its consumption and impact (exposure diversity).

These 3 'pillars' of the 2024 Framework broadly align with the work of US media scholar, Dr Philip Napoli, and his examination of diversity across the news supply chain across source diversity, content diversity and exposure diversity.[21] However, Napoli's work was adapted for the ACMA's Framework to better accommodate aspects of the Australian industry, policy and regulatory environment as outlined in Figure 1.[22]

The 3 pillars explore:

- **source diversity** (supply factors) – the extent to which news media markets are populated by a diverse array of content producers and publishers
- **content diversity** (supply factor) – the extent to which news presents different voices, viewpoints and demographic profiles
- **exposure diversity** (demand factor) – the extent to which audiences consume a diverse array of news.

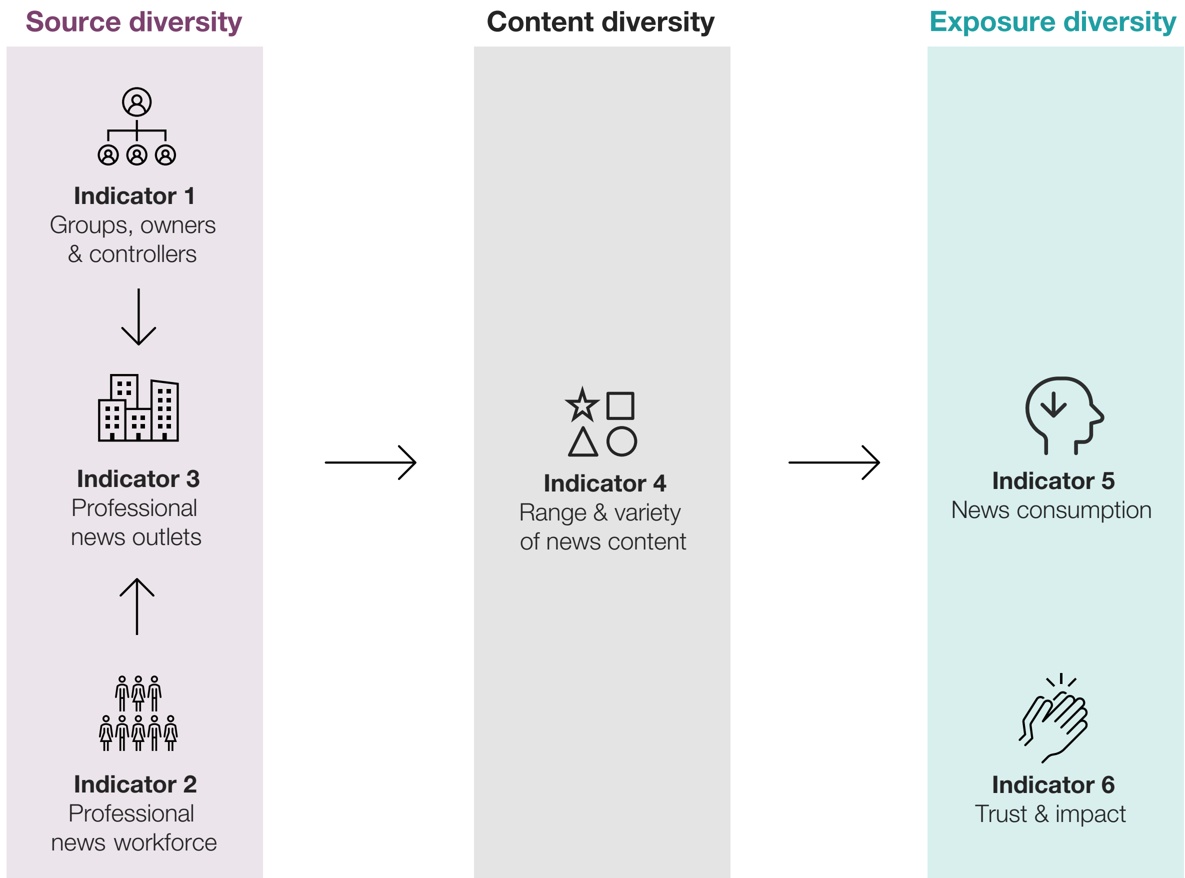
These pillars also reflect the ACMA's response to the outcomes of the 2023 consultation process and the broader objectives of the government's News MAP initiative (see Appendix C for more detail).

21 PM Napoli, 'Deconstructing the Diversity Principle', *Journal of Communication,* 1999, 49(4): 7-34, doi: https://doi.org/10.1111/j.1460-2466.1999.tb02815.x.

22 For more information, see Centre for Media Transition, *News in Australia: diversity and localism. Review of literature and research,* 2020, accessed 13 November 2024.

The 2024 Framework is comprised of 6 key indicators that sit across the 3 dimensions of news media diversity, as shown in Figure 1, and outlined in further detail below.

Figure 1: Media Diversity Measurement Framework (2024)



Reporting against the Framework's 6 indicators is intended to provide insights into diversity across supply and demand factors of news in Australia.

Source diversity

The first pillar of the 2024 Framework relates to source diversity, meaning the extent to which the Australian news landscape consists of a diverse array of news providers.

In his work on media diversity, Dr Philip Napoli conceptualised source diversity as consisting of multiple elements, including the ownership of content and outlets, and the diversity of the workforce that contributes to that content and those outlets. The Framework has drawn on this definition in shaping the parameters of this pillar.

Indicator 1: groups, owners and controllers

Who owns and/or exercises control over media groups and outlets producing professional news in Australia?

Indicator 1 captures the owners and controllers of news producers in Australia. Our 2023 report on the Framework presented the key question for this indicator as, 'Who owns and/or exercises control over media groups and outlets producing professional news and opinion in Australia?'.

In the BSA, a 'media group' is defined as a group of 2 or more media operations comprising commercial television or radio licences or associated newspapers. To clarify the types of media 'groups' whose ownership and control are explored in indicator 1, we have expanded the types of media outlets considered to be media operations to be more comprehensive and platform neutral. In this report a 'group' is defined as either:

- a news brand: this refers to a name used to publicly identify one or more news outlets. A company may operate multiple news brands – for example, News Corp Australia operates news brands including the *Courier Mail*, the *Daily Telegraph* and *The Australian*, each of which has multiple news outlets including a print newspaper and a news website. More information on this is provided in chapter 4
- a network: the term 'network' refers to a group of news outlets, spanning at least 2 news brands, that share at least one owner and/or controller. For example, the NOVA Network is a group of 8 radio outlets that all have shared controllers.[23]

Data for this indicator has been drawn from several datasets established and maintained by the ACMA as part of our regulatory functions, the Media Diversity Measurement Framework monitoring and desktop research strategy (see Appendix D) and PIJI's Australian News Index (ANI).

Indicator 2: professional news workforce

How many journalists, editors, and other media professionals contribute to the production of professional news in Australia?

Indicator 2 identifies and reports on the number of journalists, editors and other media professionals contributing to the production of professional news in Australia. This indicator draws primarily on 2011 and 2021 Census data collected and published by the Australian Bureau of Statistics (ABS).

Data available for this report limits the focus of this indicator to people who identified their 'main job' in the Census as a journalist, excluding those contributing to the production of news in journalism-adjacent roles (for example, as a media producer), or in a voluntary capacity.

23 NOVA 91.9, FIVEaa, NOVA 106.9, Star 104.5, NOVA 100.3, smoothfm 91.5, NOVA 96.9, smoothfm 95.3.

Indicator 3: professional news outlets

How many Australian news outlets are producing professional news?

Indicator 3 quantifies Australian ‘news outlets’ that provide ‘professional news’ (that is, professional news outlets). We also look at these outlets by platform type (and, where applicable, their broadcast service type) and geographic scale by primary state/territory. The definition of ‘professional news’ is discussed in detail in the *Parameters of the 2024 Framework* section below.

Data for this indicator has been drawn from several datasets established and maintained by the ACMA as part of our regulatory functions, the Media Diversity Measurement Framework monitoring and desktop research strategy (see appendix D), and PIJI’s ANI.

While our 2023 report on the Framework presented the question for this indicator as ‘How many Australian news outlets are currently producing professional news and opinion?’, there are a limited number of opinion-producing outlets included in the 2024 Framework. The inclusion of opinion content within the Framework is discussed further in chapter 3.

Content diversity

The second pillar of the 2024 Framework relates to content diversity.

Content diversity refers to diversity between, and within, news media content itself. Unlike source diversity, which is grounded in market data, examining content diversity requires reviewing and assessing news content across media outlets and platforms. Many traditional measures of media diversity, including Australia’s media ownership and control rules, have focused primarily on ‘source diversity’. This regulatory emphasis is based on a longstanding presumption that, in a competitive media environment, media outlets will seek to differentiate themselves by producing a diversity of content and viewpoints that will serve the different needs and preferences of consumers. As such, a diversity of news media sources was believed to produce diversity across the supply chain, resulting in less focus on measuring or monitoring content (and exposure) diversity.

However, as outlined in our 2020 paper and associated report, there is increasing evidence that this assumption may not be accurate. While the Australian media provides consumers with a wealth of available news content, especially online content, much of it is shared and recycled between networks, brands and outlets.

Research by Dr Philip Napoli stresses the importance of measuring content diversity as a standalone indicator, rather than assuming a causal link between source and content diversity.[24] On this basis, the 2024 Framework includes a distinct examination of content diversity to begin to support a more wholistic understanding of media power and diversity.

There are many ways to approach and understand content diversity, including Napoli’s sub-categories (program type, demographic and idea/viewpoint) as well as standpoint diversity and geographic range, among others, as discussed in chapter 7. During the 2023 consultations on the Framework, the ACMA received varied responses to the idea of measuring content diversity, including on what to measure, potential methodologies and who should undertake this work. More information on these findings is available at Appendix C.

24 See for example, PM Napoli, ’, *Journal of Communication,* 1999, 49(4): 7-34, doi: https://academic.oup.com/joc/article-abstract/49/4/7/4108153?redirectedFrom=fulltext.

Indicator 4: range and variety of news content

How much variety is present in professional news in Australia?

Drawing on data and insights from PIJI's Australian News Sampling Project, indicator 4 focuses on how much variety is present in professional news in Australia. The project collects a cross-section of news content from a sample of outlets across different locations to provide an indication of the prevalence of public interest journalism, news categories (or 'topics'), and local and original content.

The 2023 paper indicated our intention to also draw on ACMA data collected through our role in registering news businesses for the News Media and Digital Platforms Mandatory Bargaining Code (the Bargaining Code), to determine participants' 'core' and 'covered' articles as a percentage of their total news output. However, technical limitations (discussed in more detail in chapter 7) prevented this data from being incorporated into the 2024 report.

Insights for this indicator are based solely on PIJI's Australian News Sampling Project. This represents a limited approach to measuring content diversity, which we hope to significantly expand in future.

Exposure diversity

Exposure diversity refers to the extent to which audiences consume a diverse array of content, which is assessed in the Framework using measures of consumption, trust and impact. While the first 4 indicators focus on the production and supply of professional news, indicators 5 and 6 focus on the consumption of news by Australian adults, irrespective of whether it is produced by outlets that meet the 'professional news' threshold under indicator 3. For these indicators, news is taken to include any factual reporting by journalists or other information on current events at either a local, regional, national or international level, and includes both non-professional sources and international sources.

Although there has previously been a common assumption that increasing diversity of content promotes diversity of exposure, the causal nature of this relationship is unclear.[25] It is therefore important that attempts to understand media diversity include significant attention to audience engagement and acknowledge that the existence of a diverse range of news sources and/or content does not necessarily equate to diverse exposure.

Indicator 5: news consumption

What are the most consumed sources of news in Australia?

Indicator 5 examines the most accessed sources of news in Australia, regardless of platform, including international and non-professional sources. While the range of news sources and content is an important aspect of a diverse media landscape, it is also necessary to measure the extent to which audiences consume and engage with diverse sources.[26] The primary input to this indicator is data from the ACMA annual consumer survey (2022–24 results), including an expanded news module in 2024.

25 Philip Napoli, Exposure Diversity Reconsidered, *Journal of Information Policy,* 2011, accessed 18 July 2024.
26 See, for example, P M. Napoli, 'Exposure Diversity Reconsidered', *Journal of Information Policy,* 2011, accessed 18 July 2024.

Indicator 6: trust and impact

What are the most impactful sources of news in Australia and what do we know about Australians' trust in news?

Indicator 6 explores the most 'impactful' and most trusted sources of news in Australia, based on the ACMA annual consumer survey data (2023–24 results) and insights from the News and Media Research Centre's (N&MRC) Digital News Report.

For this report, 'impact' refers to impact on *individual* attitudes and decision-making, rather than impact on public and political discourse, policymaking or society more broadly.

Impact itself is difficult to measure with existing sources of data. For this reason, we have used measures of 'reliance' and 'share of attention' as proxies for 'impact' in this initial report and will consider if more direct measures are feasible in future.

As outlined in the Digital News Report, trust and distrust in news are not necessarily aligned to news access. Therefore, we have examined trust as a separate metric, rather than an additional proxy for impact. While there may be indirect pathways from trust and distrust to impact, it is beyond the scope and conceptual framing of this report to include such an analysis. We will consider if further research into the relationship between trust and impact is warranted in future.

Alignment between indicators

We have aimed for a high degree of alignment between indicators by, where possible, using consistent parameters, terminology and data. This can support more meaningful analysis by enabling readers to, for example, track source, content and consumption diversity metrics for a specific group of news outlets and brands.

However, as this first iteration of the Framework relies on a range of existing ACMA and third-party data, there are significant limits to overall alignment across the 6 indicators. As a result, this report does not contain cross-indicator insights between the 3 source diversity indicators (indicators 1 to 3), nor between the exposure diversity indicators (5 and 6) or the source and content indicators (1 to 4), as outlined below.

Indicators 1, 2 and 3 (source diversity) are related through their measurement of different components of source diversity in the Australian news market. Whilst there is a high degree of alignment between indicator 3, which is focused on professional news outlets, and indicator 1, which addresses ownership and control of networks and outlets, measurement of the professional news workforce under indicator 2 does not necessarily measure the number of staff at those same outlets counted under indicator 3.

ABS data used for indicator 2 does not specify whether those counted as professional journalists, editors, and other media professionals are employed at professional news outlets. As a result, the number of journalists reported under indicator 2 is not a direct reflection of the journalists employed by the news outlets included in indicator 3 data. While it is not possible to determine the extent of this disconnect, indicator 2 data is likely to contain an overcount of journalists employed by professional news outlets in some areas, and an undercount in others (this is discussed further in chapter 5).

Another key variation is the measurement of consumers' engagement with news content produced by both international and non-professional news sources under indicators 5 and 6 (exposure diversity). While some of these outlets may be just as, or more, popular or impactful than some professional Australian news outlets, their owners, controllers and editorial staff are not captured in indicators 1 to 3. Similarly, the diversity of content produced by international and non-professional news outlets is not currently within the scope of indicator 4 (content diversity). More information is provided in chapter 7.

A primary goal for future iterations of the Framework will be to achieve greater alignment between all indicators through the expansion of parameters and an increase in data inputs.

Parameters of the 2024 Framework

The scope, definitions and application of the 2024 Framework have been informed by key policy instruments, including the News Media and Digital Platforms Mandatory Bargaining Code (the Bargaining Code) the News MAP and existing sources of supporting data, as outlined below.

While the scope of the 2024 Framework has some limitations as outlined, we intend to revisit these definitions and parameters throughout the evolution of the Framework, and, where appropriate, expand and update them. More information about how these parameters might change in future iterations is provided below (see *Further development of the Framework*).

The 2024 Framework and this initial report are focused on collating existing ACMA and third-party data, research and analysis, as set out below. We have started preliminary scoping work to identify key data gaps and explore opportunities to address these gaps, which will be a key focus from 2025.

Table 1: Key sources of existing data and research

	Indicator 1: groups, owners and controllers	Indicator 2: professional news workforce	Indicator 3: professional news outlets	Indicator 4: range and variety of news content	Indicator 5: news consumption	Indicator 6: trust and impact
ACMA	✓		✓		✓	✓
Australian Bureau of Statistics (ABS)		✓				
Public Interest Journalism Initiative (PIJI)	✓		✓	✓		
News and Media Research Centre (N&MRC)						✓

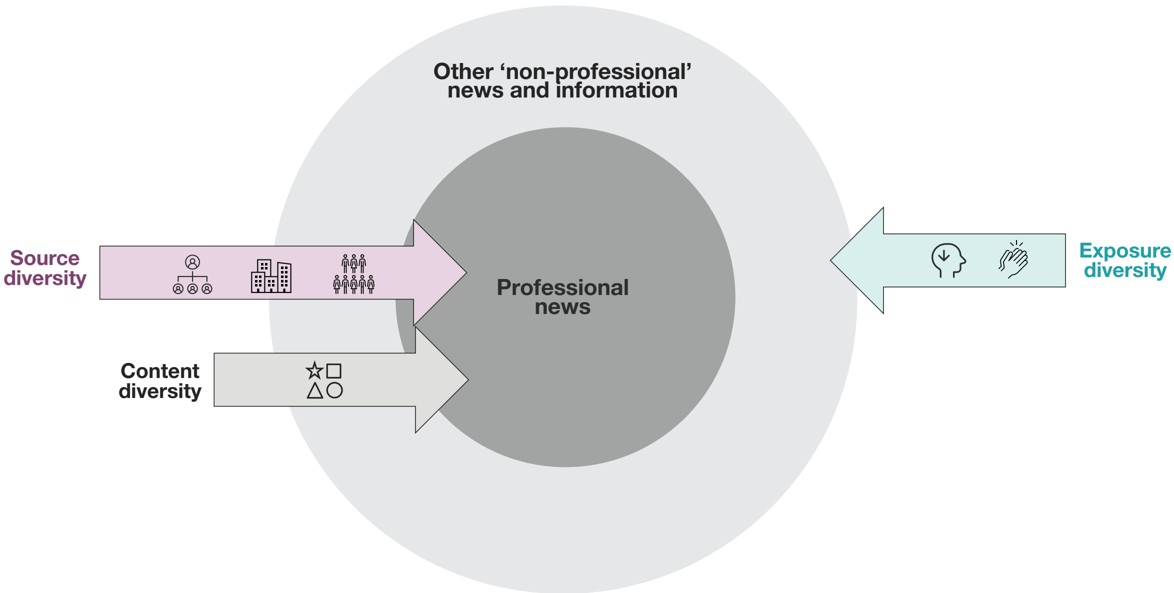
Professional news

Indicators 1 and 3 (source diversity) focus on measuring the diversity of networks, brands and outlets that produce professional news. Indicator 4 (content diversity) predominantly focuses on professional news outlets,[27] while recognising that many of these outlets produce both professional (as defined under the Framework) and other types of news content.

The indicators relating to exposure diversity (indicators 5 and 6) take a broader approach in examining the types of news that audiences consume. For these indicators, we examine news diversity from the consumer perspective – namely, the ways in which Australians access, consume and relate to news regardless of whether news outlets or the content itself are considered 'professional'. As noted above, non-professional sources of news are in-scope for these indicators. More information is provided in chapters 8 and 9.

See Figure 2 for a visual depiction of how the professional news parameter operates within the Framework.

Figure 2: How 'professional news' acts as a parameter in the 2024 Framework



To determine whether an outlet meets the 'professional news' requirement for inclusion in the Framework, we have adopted some of the criteria used to assess news sources for inclusion in the Bargaining Code and PIJI's ANI.[28] These criteria are:

- an adherence to professional standards
- editorial independence
- public availability
- operation predominantly in Australia
- that they produce, broadcast and/or publish 'core' news.

27 The exception to this is that one data source for this indicator also includes 'community scale' outlets that have not yet been assessed to determine their alignment with relevant professional standards. See chapter 6 for more information on community scale outlets and their exclusion from other parts of the Framework.

28 To be registered under the Bargaining Code, the major criteria a news business must satisfy are contained within 4 central tests, namely a) the content test, b) the Australian audience test, c) the professional standards test and d) the revenue test. See *Federal Register of Legislation - Treasury Laws Amendment (News Media and Digital Platforms Mandatory Bargaining Code) Act 2021*; For inclusion in PIJI's Australian News Data Project, a news outlet should primarily and regularly produce: (i) original public interest journalism for (ii) a local, metropolitan, state or national (iii) public audience, and (iv) adhere to identifiable professional and ethical standards. For more information, see PIJI's Australian News Index.

The Framework does not require outlets to meet other criteria from the Bargaining Code, such as the revenue test, meaning the professional news outlets captured by indicators 1 and 3 (source diversity) in the 2024 Framework are more broadly defined than those registered under the Bargaining Code. For example, these indicators include both for-profit and not-for-profit entities.

Importantly however, news outlets that may not meet all of the above criteria and are therefore not counted as 'professional' under the Framework, can still serve an important role in some communities (for example, see *Case study 1* on Christine Howes' community newsletters, below).

Professional standards

Under the Bargaining Code, applicants must establish that the news outlet(s) they wish to register is subject to relevant professional journalistic standards.

The professional journalistic standards that are identified in the Bargaining Code include:

- the rules of the Australian Press Council Standards of Practice or the Independent Media Council Code of Conduct
- the Commercial Television Industry Code of Practice, the Commercial Radio Code of Practice or the Subscription Broadcast Television Codes of Practice
- a code of practice mentioned in paragraph 8(1)(e) of the *Australian Broadcasting Corporation Act 1983* or paragraph 10(1)(j) of the *Special Broadcasting Service Act 1991*
- internal editorial standards analogous to any of the standards identified above to the extent that they relate to the provision of quality journalism.

For the 2024 Framework, we have expanded relevant professional journalistic standards beyond those identified in the Bargaining Code.

This is in part because the initial metrics for indicators 1 and 3 (source diversity) rely on third-party data from PIJI. PIJI's approach to determining adherence to professional standards (for inclusion in its ANI) is similar but slightly broader than the Bargaining Code. Importantly, PIJI's professional standards test includes 'substantially equivalent editorial standards relating to the provision of quality journalism'.[29]

However, PIJI only applies its requirement to adhere to professional standards (and its other criteria) to a news outlet's 'primary format'. As the Framework is platform-neutral, we do not apply a primary format, meaning we count each individual platform (such as newspaper, free-to-air TV and news website/app) as an individual news outlet. As a result, PIJI's criteria have not been explicitly applied to some outlets included in our data. Therefore, it is possible some of these individual outlets may not meet one or more of our criteria, including the requirement to adhere to identifiable professional standards.

29 Public Interest Journalism Initiative, *Eligibility for the Australian Newsroom Mapping Project*, accessed 13 August 2024.

For example, as outlined above, commercial broadcasters must adhere to one of the industry codes of practice. While PIJI may consider their broadcast to be their 'primary format' and include them in the ANI on that basis, the industry codes of practice for commercial broadcasters only apply to content broadcast on TV or radio. In contrast, many digital platforms do not yet have comparable industry-wide professional standards. This does not mean no digital platforms can be counted under indicator 3 but rather, as outlined above, they would need to adhere to 'internal editorial standards analogous to any of the standards identified … to the extent that they relate to the provision of quality journalism'. Our plans to address this limitation are discussed further in the *Next steps section of chapter 6.*

PIJI's approach also exempts a small number of 'community scale' news outlets from its professional standards test. As we could not determine the extent to which these outlets met the 2024 Framework's criteria for professional news outlets, they have been excluded (this is discussed in further detail in the *Data sources* section of chapter 6).

However, news outlets that adhere to external professional journalistic standards that are not specifically identified in the Bargaining Code have been included in the 2024 Framework, including the:

- Community Radio Broadcasting Codes of Practice
- Community Television Codes of Practice
- Media, Entertainment and Arts Alliance (MEAA) Code of Ethics
- Local and Independent News Association (LINA)'s Editorial Standards.

Editorial independence

To be included in the Framework, news outlets must have editorial independence from the subjects of their news coverage. For this criterion, we have adopted the approach used under the Bargaining Code to establish what editorial independence means.

The Explanatory Memorandum to the Bargaining Code states that for a news outlet to be considered 'editorially independent', it cannot be owned or controlled by a political advocacy organisation (such as a political party, lobby group or union) or an entity with a commercial interest in its coverage (for example, a publication that covers a sport that is owned or controlled by the sport's governing body). As further noted in the Explanatory Memorandum, the editorial independence requirement is not intended to exclude a news outlet that occasionally includes reporting about itself or a related business, or about an issue affecting itself or a related business.

Public availability

Outlets must also publish content for a public audience, meaning that it is readily available to anyone who wishes to access it. This requirement has been adopted from PIJI's methodology to exclude outlets that, for example, require someone to be a member of an association or industry to access their content. This criterion does not exclude professional news outlets that charge fees for access to their content.

Operation predominantly in Australia (Australian audience test)

News outlets must also have an Australian audience to be eligible for inclusion in the Framework. For this criterion, we have adopted the Bargaining Code approach to establish what an Australian audience means.

To meet the Bargaining Code's Australian audience test, a news outlet must operate predominantly in Australia and for the dominant purpose of serving Australian audiences. For example, a foreign news business that occasionally produces Australian news content, or that has an Australian news outlet would not pass the Australian audience test unless it is also operating predominantly in Australia. Equally, a foreign news organisation that has a large Australian audience but does not produce Australian news content, such as BBC News,[30] would also be excluded, even if it is supplied to Australians by an Australian company, such as a subscription TV provider.[31]

We acknowledge that many communities in Australia rely on international media as key sources of news and, as with other parameters of the 2024 Framework, this is an area that could be expanded in future. The Australian audience test does not apply to indicators 5 and 6 (exposure diversity), meaning reporting on these indicators does include international news sources where they are identified by respondents to relevant consumer surveys. While including international news sources that do not meet the Australian audience test in other indicators, for example, in 1 and 3 (source diversity), is beyond the scope of the 2024 Framework, future iterations may include these types of sources.

Production of 'core' news content

To be included in the 2024 Framework, news outlets must produce 'core news' content, as defined by the Bargaining Code.[32]

Section 52A of the Bargaining Code defines 'core news' as content that reports, investigates or explains:

- issues or events that are relevant in engaging Australians in public debate and in informing democratic decision-making issues; or
- current issues or events of public significance for Australians at a local, regional or national level.

The Explanatory Memorandum notes that 'core news content can relate directly to matters of public policy and government decision-making at any level of government'. However, it can also include other matters of public significance, such as reporting on law and order, health, education, environmental issues, science, industrial relations, business and coverage of current issues or events where these are of public significance at a local, regional or national level.

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30 See, for example, Australians' use of the BBC News website in *Communications and media in Australia: How we access news*.

31 Although PIJI's methodology does not include an Australian audience test, we understand that it produces a materially similar outcome, in that news outlets captured in the Australian News Index must produce public interest journalism for a local, metro, state or national (Australian) audience. However, PIJI's methodology does potentially allow the inclusion of some outlets that may not meet the 'operation predominantly in Australia' aspect of the Framework test, as news brands are not necessarily required to hold an Australian ABN. Given the relatively small number of news brands affected by this, we are satisfied that outlets included in the Australian News Index are likely to meet the Australian audience test, with only a small number of exceptions, if any.

32 To be registered to the Bargaining Code, a news business must demonstrate that its primary purpose is the production of content that is core news content. Once it has met that threshold and been registered, it can bargain with a designated digital platform for all its content (including core and covered news content) used by the digital platform. At this stage, the Framework does not explicitly require news businesses to meet these primary and regular purpose requirements and instead only looks at whether a news outlet produces any core news. The Framework does however exclude entertainment-oriented publications or programs where the predominant purpose is to entertain rather than inform, such as celebrity gossip, fashion or lifestyle news. In this regard, the Framework maintains a focus on capturing outlets that provide core news. However, we note that these parameters are subject to future expansion as more evidence is collected about the nature of news that various outlets provide.

Reporting on community issues or events is considered core news content if they are of public significance. Matters that are principally private or special interest are not included.

The Bargaining Code's Explanatory Memoranda expands on the idea of 'core news' by providing an explicit definition of 'covered news'. Here, covered news is described as content intended to capture topics such as sports and entertainment news, including interviews with coaches and players, reporting about the entertainment industry, coverage of reality television and certain talk-back radio discussions.

PIJI's definition of public interest journalism is similar to the definition of core news. The definition of public interest journalism that PIJI adopted for its Australian News Data Project is 'original content that records, reports or investigates:

- issues of public significance for Australians
- issues relevant to engaging Australians in public debate and in informing democratic decision making
- content which relates to community and local events.'[33]

Where the 2024 Framework has drawn on PIJI's third-party data for indicators 1 and 3 (source diversity), some outlets may provide news content that, while considered public interest journalism, may not meet the Bargaining Code's definition of core news. For example, PIJI includes news outlets that produce 'content which relates to local and community events',[34] which may not meet the threshold for core news outlined above.

Definitions of news and public interest journalism and their role in defining the scope of the news market is complex and remains an important consideration for the ACMA and many stakeholders. The 2024 iteration of the Framework uses both core news and PIJI's definition of public interest journalism to capture and monitor important trends in the supply and consumption of news and information based on data currently available. With further evidence and insights into the types of news and information that Australians rely on, the scope of the Framework and definitions of news may be reviewed and modified in future.

News and opinion

Looking at the difference between news and opinion, the Explanatory Memorandum for the Bargaining Code indicates that 'pure opinion or commentary on news content will generally not be considered core news'. However, it indicates that opinion-based or editorial content that 'plays a significant role in reporting, investigating or explaining issues that are relevant in engaging Australians in public debate and in informing democratic decision-making' may be considered core news.

Although the Framework adopts this definition of core news, we are not aware of any opinion-only outlets included in indicator 3 data.

Case study 1 below highlights an example of several related news outlets that are an important source of community news, despite potentially not meeting some of the professional news parameters outlined above.

33 Public Interest Journalism Initiative, *Australian News Data Report: Monthly issue July 2024*, July 2024, accessed 21 October 2024, 15.
34 Public Interest Journalism Initiative, Glossary, accessed 11 July 2024.

Case study 1: Christine Howes

Journalist, photographer and editor Christine Howes

Christine Howes and her community newsletters

Since the 1990s, journalist, photographer and editor Christine Howes has produced more than 30 free community newsletter series for remote First Nations communities in north Queensland, several of which are still in circulation. None of Christine's active newsletters are included in indicator 3 (professional news outlets) data sources and therefore, are not included in our reporting against the 2024 Framework. However, as demonstrated below, this does not mean the newsletters are not an important source of news in certain communities, some of which may be unable to sustain 'professional' news outlets.

In addition to their focus on remote First Nations communities, Christine's newsletters are typically about communities that have few to no news outlets serving them, characterised by PIJI and others as 'news deserts'.[35] They also tend to be published by (and report on) Aboriginal shire councils, meaning that some of Christine's newsletters may not meet the Framework requirement for editorial independence. In addition, they predominantly focus on showcasing community and individual achievements and events, meaning Christine's newsletters may not meet the Framework's 'core news' requirement.

'My own kind of journalism': what makes Christine's community newsletters tick?

However, these factors are also identified by Christine as contributing to the success of her newsletters. Christine says the publication of her newsletters by local institutions provides the structure necessary to create a foothold in the remote communities, which as an outsider and non-Indigenous journalist, also helps her to build trust with the community.

Christine's focus on 'good news stories' also caters to the communities she serves and in some cases, helps counter negative media coverage. While it may be argued that it serves the publishers' interests for Christine to focus on these stories, she says there is very rarely any editorial influence.

PORMPUR PAANTHU ABORIGINAL CORPORATION

PPAC

30: 16 November 2020

NEWS WEEK

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22-23 Yalu St, Pormpuraaw Q 4892
Phone (07) 4060 4105
Fax (07) 4060 4280

Cairns is as COVID-safe as it can be Queensland Health says

Queensland Health wants to assure First Nations communities that Cairns is safe to visit and if you need to access medical support or any other service, you can do so safely there.

Queensland Health has strong public health guidelines to protect Queenslanders from COVID-19, including the requirement for anybody returning from a hotspot to quarantine for 14 days.

In Cairns, there are several quarantine hotels which have been selected due to their proximity to major airports.

These hotels must follow strict requirements from Queensland Health.

During quarantine, people have no interaction with the public.

This is supervised by Queensland Police who have a 24/7 presence at all quarantine hotels.

Anyone who is in quarantine has to provide a negative COVID-19 test result before being allowed to exit quarantine and re-enter the community.

At this time, there are no international flights scheduled to arrive in Cairns as part of the repatriation process.

South East Queensland is quarantining all repatriated travellers coming into Queensland.

We have not seen any COVID-19 spread from our hotel quarantine and we are confident that our systems will continue to keep the residents of Cairns and remote communities safe.

Queensland's quarantine system is very effective.

Queensland Health works in partnership with the Queensland Police Service to ensure quarantine requirements are followed.

Our goal is to keep mob safe during the COVID-19 pandemic.

ndis

NDIS In partnership with Pormpur Paanthu Aboriginal Corporation

The role of the Remote Community Connector (RCC) is:

- To Provide you with information on the NDIS
- To help you connect to the NDIS and get supports for your disability
- To assist you to attend appointments and meeting with the NDIA and other disability services

Please Contact:
0740604260 or 0437553615
NDISconnect@ppac.org.au

Artists wanted

Pormpuraaw's Art & Culture Centre is offering ongoing work to people 'wanting to give it a go' as an ongoing contribution to NAIDOC celebrations this year.

The Centre will pay those willing to help them touch up some of the older murals and paint some new ones around the community.

Young people in particular are encouraged to come and try their hand at the work that needs to be done.

For more information contact Paul on 0437 172 758.

Front cover of PPAC News Week (published by Pormpur Paanthu Aboriginal Corporation). Image source: Christine Howes

She also says that writing a higher number of critical news

35 Public Interest Journalism Initiative (PIJI), Glossary, PIJI website, n.d., accessed 29 October 2024.

stories would simply be impractical. 'You could do a couple of gotcha stories for sure, but eventually you're going to run out of people to talk to.'

Locating Christine in the Framework

This case study is also an example of the limited alignment between source diversity indicators in the 2024 Framework noted earlier in this chapter. While Christine's newsletters are not counted as professional news outlets under the 2024 Framework, it does not necessarily follow that Christine – who identifies as a journalist – is not counted as part of the professional news workforce under indicator 2 (professional news workforce). This is because indicator 2 relies on the Australian Bureau of Statistics (ABS) data, which does not require a person to work for a professional news outlet to be counted as a journalist. The ABS considers any person who identifies journalism as their 'main job' in the week before the census, to be a journalist (indicator 2 limitations are discussed further in chapter 5 and Appendix F).

Ultimately, this case study suggests the very factors that may present barriers for news outlets like Christine's to be counted as 'professional' (namely, the link between publisher and subject of news coverage, and focus on non-core news), are also those that directly contribute to their success in places with few to no 'professional' news outlets. While parameters are a necessary part of the Framework, it is important to identify where they narrow the diversity of the Australian news market being represented. The ACMA will continue to evaluate the efficacy of these parameters, including through case studies like this, to support further enhancement of the Framework in future.

Treatment of social media, search engines and news aggregators

News consumption via social media, search engines and news aggregators present a unique challenge for measurement. While these platforms are not themselves considered news producers, they wield considerable and growing influence over the news diets of their users. As such, the 2024 Framework frames social media, search engines and news aggregators as a distinct category of news platform: ‘online intermediaries’ (also referred to as ‘digital platforms’). This is consistent with the approach and recommendation of Ofcom when examining news consumption via these platforms. Indicators 5 and 6 (exposure diversity) provide some initial insight into the effect of online intermediaries on exposure, trust and impact. This is another area that may be examined in greater depth in future reports.

Examination of content diversity

Indicator 4 of the Framework seeks to measure the range and variety of professional news and opinion content in Australia. This includes an assessment of the percentage of public interest journalism and the various categories present in sampled articles as well as the degree of localism to the audiences of sampled content. More information is available in chapter 7.

Due to the resource-intensive nature of content analysis (and the need to ensure this analysis is conducted independently), the 2024 Framework does not include qualitative analysis of content to determine the originality, relevance or viewpoint diversity of news content. These are areas that we hope to explore in future iterations of the Framework.

Demographic data

The 2024 Framework draws on multiple datasets that provide demographic breakdowns by location, age, sex and/or gender. In most cases, sex and gender are described using the categories ‘women’ and ‘men’ and/or ‘male’ and ‘female’. This approach reinforces and relies on binary constructions of sex and gender that ignore and may make invisible those whose experience of sex and gender sit outside of these binaries, such as many intersex, transgender and gender diverse people. We also note that, while ‘sex’ and ‘gender’ are often used interchangeably in various data sources (and subsequently, at various points in the report), they are distinct concepts and should ideally be treated as such. We hope to improve upon the consideration of sex and gender in future iterations of the Framework and, where possible, move closer to the recommendations made by the Australian Bureau of Statistics regarding the collection and presentation of this type of data.

Further development of the Framework

While Figure 1 reflects the 2024 Framework in its current form, as highlighted in our 2023 report, the Framework is not intended to remain static.

The 2024 Framework provides an initial structure to assess diversity across Australia’s news media landscape, using existing data sources. The current scope and indicators are also intended to act as a foundation for the further development of the Framework in future.

The 2024 Framework has a number of limitations, including in relation to its parameters, alignment between indicators and available data. While it is important to establish some baseline metrics and monitor changes, any measurement framework – much like the news sector itself – needs to be adaptive and flexible to respond to changing market conditions, technological developments and societal trends.

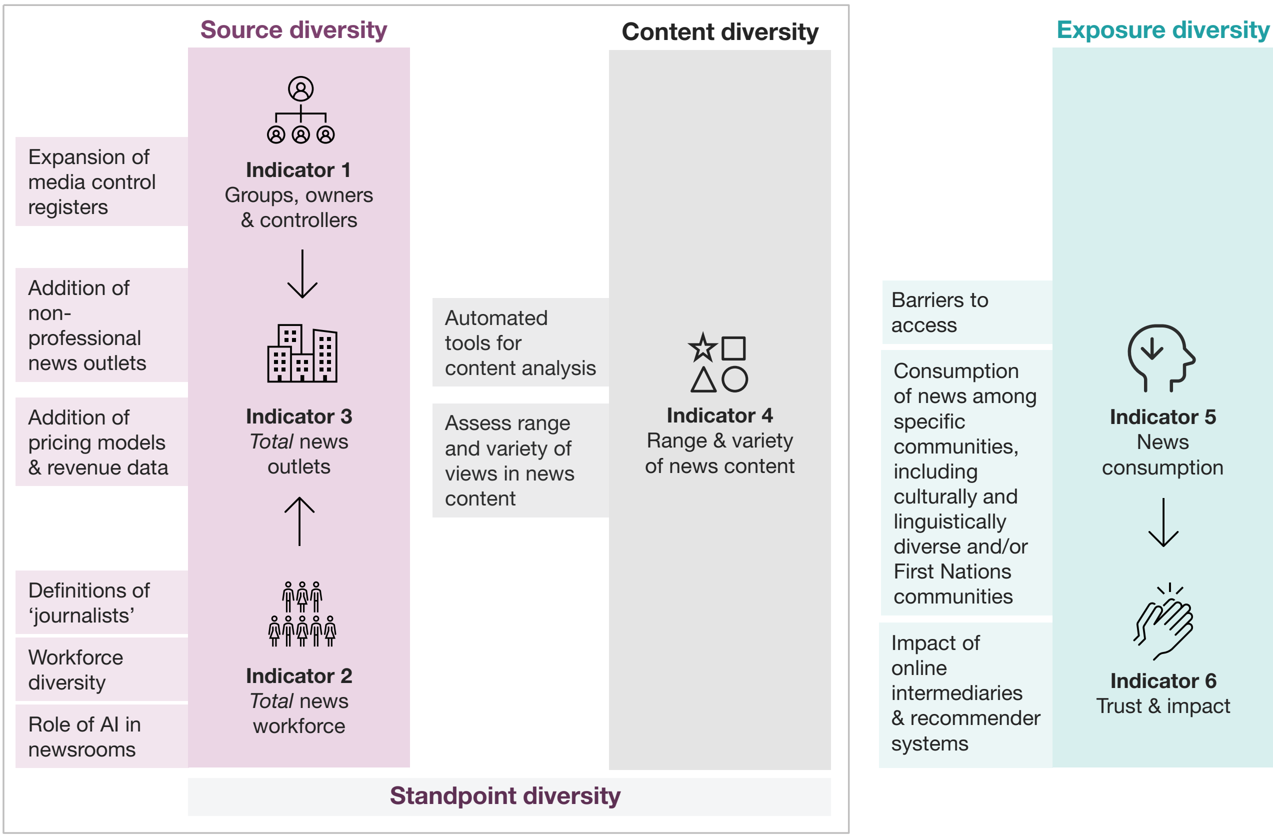
A potential future state is illustrated below at Figure 3, indicating opportunities to expand the Framework in future based on previous consultations (see Appendix C for an overview of the 2023 consultation process). In this example, the Framework could incorporate a greater focus on standpoint diversity[36] – in particular, how this intersects with existing data from indicators 1 to 4 (source and content diversity) – and greater consideration of the role of artificial intelligence (AI) and other emerging technologies across the news and media supply chain.

Future directions

There are other initiatives underway to measure the state of media diversity in ways that are not captured by the Framework. We intend to work with relevant stakeholders to ensure our respective activities are complementary and not duplicative, wherever possible. We also hope to consider new research opportunities that can support a fuller understanding of the state of challenges to, and ways to strengthen, media diversity in Australia.

Immediate priorities and additional opportunities to be explored in relation to each indicator are outlined in the *Next steps* section of relevant chapters.

Figure 3: Media Diversity Measurement Framework (potential future state)



36 The extent to which all people – but particularly those belonging to often marginalised and/or underrepresented groups – are both a part of, and represented by, the media environment. More information is provided in chapter 7.

4.

Indicator 1: groups, owners and controllers

Who owns and/or exercises control of media groups and outlets producing professional news in Australia?

Key insights

- The Australian news market is highly networked, with almost 70% (1,262) of the 1,818 news brands identified belonging to one of 106 networks.[37]
- The 10 largest networks account for 43% of all news brands and have a large share of Australian audiences' attention.
- Control data is only available for 12% of professional news outlets, limiting our ability to make definitive findings about media ownership and control.

➔ View the interactive data report for indicator 1.

Introduction

Transparency about the ownership and control of the outlets (and groups of outlets) that produce professional news is key to understanding media diversity in Australia. A news market with a diverse range of owners and controllers, both within and across different platforms, can increase consumers' access to a range of perspectives on news and current affairs, while a lack of diversity in ownership and control can have the opposite effect.

Regulation of ownership and control

The *Broadcasting Services Act 1992* (BSA) provides the current basis for regulating and measuring the diversity of media ownership and control in Australia. While the core media diversity regulations set out in the BSA (and detailed in chapter 1) are sometimes referred to as 'ownership and control' rules, their focus is predominantly on the concept of control.

However, these rules only apply to about one in 8 professional news outlets, including certain commercial TV and radio broadcasters[38] and a small number of newspapers associated with the licence areas of these broadcasters, called 'associated newspapers'.[39]

Diversity in the ownership and control of this group of commercial broadcasters and associated newspapers is measured by the number of independent media 'voices' in commercial radio markets (which are based on commercial radio broadcast licence areas).[40] The BSA sets out rules in relation to the minimum number of independent media voices in these markets, however only outlets subject to media control rules are counted as 'voices'.

The BSA also places limitations on the number of commercial TV licences and commercial radio licences that a person may be in a position to exercise control of in commercial TV and commercial radio broadcasting licence areas, and similar limitations on directorships. These rules are known as the '1-to-a-market rule for television' and the '2-to-a-market rule for radio'.

37 All percentages provided in this chapter have been rounded to the nearest whole number.

38 Control rules under the BSA do not apply to commercial TV broadcasting licences allocated under sections 38A, 38B and 38C of the BSA or commercial TV or radio broadcasting licences allocated under section 40 of the BSA.

39 An 'associated newspaper' is one that that is linked in terms of circulation with the relevant licence area. Specifically, a newspaper is 'associated' with a commercial television broadcasting licence if more than 50% of its circulation is within the relevant licence area, while a newspaper is associated with a commercial radio broadcasting licence if more than 50% of its circulation is within the relevant licence area and the newspaper's circulation covers at least 2% of the licence area's population. Most small community papers do not meet this threshold. This also excludes the national newspapers.

40 A 'voice' is a commercial television broadcasting licence, a commercial radio broadcasting licence or an associated newspaper (a 'media operation'), or a group of 2 or more media operations (a 'media group'). A standalone media operation and a separate media group each count for one 'point' under the 'minimum voices' rule.

Scope of the 2024 Framework

We take a broader approach to measuring the diversity of the ownership and control of the Australian news market than the BSA. The 2024 Framework covers all news outlets that publish or broadcast professional news via any platform. We have taken this approach to ensure the Framework provides as complete a picture as possible of the Australian news market, and therefore news media ownership and control. However, because this wider scope includes groups and outlets that operate outside our regulatory remit, we have needed to combine several ACMA and third-party sources to develop a more complete view of who owns and controls news media groups and outlets that are not subject to media control rules.

Data sources

> ***Currency of data***
>
> Data referenced in this chapter was current at **17 December 2024**.
>
> The corresponding interactive data reports on our website are regularly refreshed with new data. This means that, over time, some numbers in the online reports will vary from those referenced in this chapter.

We have integrated data from 3 internal ACMA sources. These include the Register of Radiocommunications Licences (the RRL) and the media ownership and control registers, that provide data about TV and radio broadcasters and associated newspapers.[41] We have also included some data from the register of eligible news businesses, which contains data about news businesses that publish content online and are registered by the ACMA under the News Media and Digital Platforms Mandatory Bargaining Code (the Bargaining Code).

The Australian News Index (ANI) is another key data source. The ANI is a cross-platform database of Australian news outlets and their owners, published monthly by the Public Interest Journalism Initiative (PIJI). Data used in this report was current to 30 November 2024. This source is made available by PIJI under a Creative Commons licence.

To address gaps in the above data sources (where possible), we use the Framework monitoring and desktop research strategy. More information about the strategy and how information collected with it has been used in the 2024 Framework is outlined in Appendix D.

Data limitations and gaps

Control data

The ACMA records media control data through several sources.[42] While our Media Control Database is the most complete database on media control, it only captures 12% (354) of professional news outlets. For some platforms, we do not have access to any suitable control data. These include all digital platforms (that is, news websites/apps, social media, email newsletters and podcasts), as well as magazines, and community, subscription and national (that is, public) radio and TV outlets. There is no legislative basis for the ACMA to compel the collection of control information about the 88% of outlets not subject to media control rules.

41 An 'associated newspaper' is one that that is linked in terms of circulation with the relevant licence area. Specifically, a newspaper is 'associated' with a commercial television broadcasting licence if more than 50% of its circulation is within the relevant licence area, while a newspaper is associated with a commercial radio broadcasting licence if more than 50% of its circulation is within the relevant licence area and the newspaper's circulation covers at least 2% of the licence area's population. Most small community papers do not meet this threshold. This also excludes the national newspapers.

42 These sources include notifications received under Part 5 of the BSA, the Associated Newspaper Register maintained under section 59 of the BSA, and the Register of Controlled Media Groups maintained under section 61AU of the BSA.

Ownership data

We have identified the direct owner of all but 10 news outlets (9 brands).[43] However, the parent entity (or entities) is only known for 207 direct owners included in the ANI. While the concept of parent entity is not an explicit part of the Framework, it has allowed us to group outlets with different direct owners together into networks (discussed further in Appendix F). Where we do not have parent entity or control data, our ability to identify networks is reduced.

Network data

The count and composition of networks identified under the 2024 Framework are affected by the above limitations. This is because, as explained later in this chapter and detailed further in Appendix F, networks are identified based on shared ownership and/or control.

Analysis

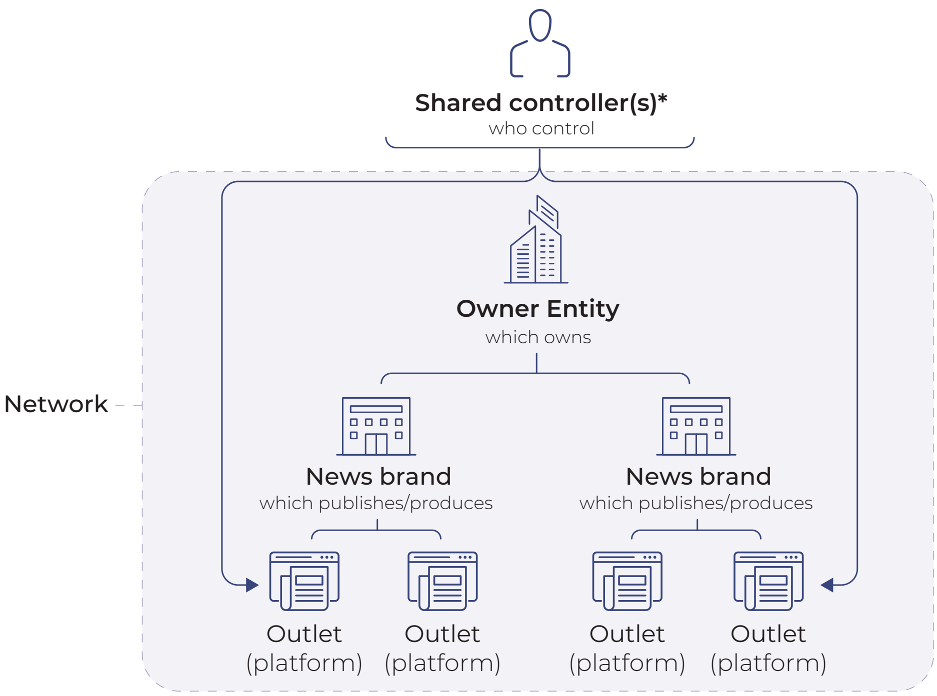
Under the 2024 Framework, we explore the diversity of media ownership and control via the owners of news outlets and 2 types of media groups that can comprise multiple outlets:

- news brands
- networks.

For outlets that are subject to media control rules, we also look at the role of controllers in forming the above groups.

Figures 4 and 5 below represent a typical relationship between controllers, networks, owners, news brands and news outlets, for reporting against indicator 1.

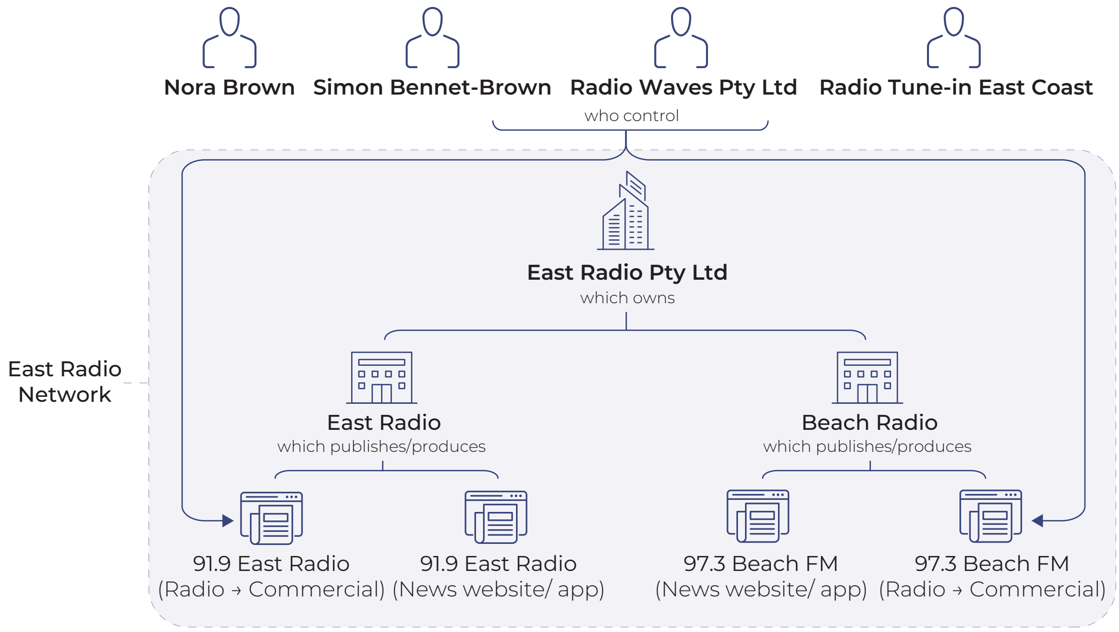
Figure 4: Indicator 1 taxonomy (defined terms)[44]



** For outlets represented in the ACMA's media control registers only. The ACMA does not have controller data for any other outlets.*

43 Definitional differences mean a small number of owners identified may not be the direct owner – see Appendix F for detail.
44 See Appendix B: glossary.

Figure 5: Indicator 1 taxonomy (with fictional example)[45]



News brands

We use the term 'news brand' to describe the name used to publicly identify one or more news outlets to consumers. News brands distribute content via a range of platforms, for example, free-to-air TV, news websites/apps and newspapers, with each distribution channel referred to as a 'news outlet' (discussed further in chapter 6).

Connection to a news brand implies some level of shared editorial control and therefore shared content among outlets, although content may sometimes be exclusive to one outlet. This is typically one of the few groupings that is transparent to consumers and therefore valuable in understanding how consumers may perceive ownership and control.

Examples of news brands

Smooth 91.5 Melbourne is an example of a news brand. According to our data, this brand currently has 2 outlets: a news website/app and a radio outlet.

While Smooth 95.3 Sydney shares a network (NOVA Network) and part of its brand name with Smooth 91.5 Melbourne, we count them as separate news brands due to their different locations. Similarly, we consider ABC Wimmera and ABC Sydney to be different news brands, although they are both part of the ABC network.

While some brands (for example, ABC brands) correctly imply a relationship with a given owner and/or network (for example, the ABC), the relationship between brands and their owner and/or network is not always apparent.

For example, Nine Brisbane and Nine regional Western Australia may appear related, but only the former is considered part of the Nine Network. Nine regional Western Australia is considered part of the WIN Network, as its licensee (owner) is WIN Television WA Pty Ltd. The inclusion of 'Nine' in its brand name reflects an affiliation deal between WIN and Nine, which allows WIN to broadcast Nine Network content in WA. However, as the licensee, we consider WIN the owner.

45 Controllers, owner entities, brands and outlets in this diagram are fictional and for illustrative purposes only.

We identified 1,818 Australian news brands comprising 2,864 professional news outlets. Of the 1,818 brands identified, we found:

- each news brand has 1 to 3 news outlets
- almost 70% (1,262) of brands are part of a network, while 556 brands are independent (insights about networks are discussed further below).

Owners

'Owner' and 'ownership' are not defined in either the BSA or other legislative or policy frameworks, such as the Bargaining Code. For the 2024 Framework, we have defined an owner as the legal person or entity responsible for ensuring the content published or broadcast by the news outlet complies with relevant professional standards.

It is important to note that the definition of owner entity does not include parent and other entities that may form part of an ownership structure but do not directly own one or more news brands (for example, a company that holds shares in or owns a licensee).

Table 2 shows how this definition applies to news outlets across different platforms.

Table 2: Platforms and owners

Platform	Owner
Newspaper	The publisher
Magazine	The publisher
Free-to-air TV	The licensee[46]
Subscription TV	The licensee
Radio	The licensee[47]
News website/app	The publisher
Podcast	Variable – some are owned by the host(s), some by a podcast studio, some by a hosting platform
Social media (page or group)	The publisher
Email newsletter	The publisher

Under the Framework, where an owner is known for one news outlet, we also assign that owner to other outlets that are part of the same news brand.[48] This is consistent with PIJI's approach in the ANI, where ownership information is recorded at the news brand level, rather than at the outlet level. While it is possible that 2 outlets within a shared brand could have different owners, we are not aware of any such examples and have therefore taken this approach to align with PIJI's approach and to reflect the likely scenario in most cases.

46 National broadcasters (that is, ABC and SBS) are not required to hold broadcast service licences. Therefore, it is not correct to refer to them as 'licensees'. In these instances, the entities we have identified as owning the broadcasters (that is, the Australian Broadcasting Corporation and the Special Broadcasting Service Corporation, respectively) are the owners.

47 National broadcasters (that is, ABC and SBS) are not required to hold broadcast service licences. Therefore, it is not correct to refer to them as 'licensees'. In these instances, the entities we have identified as owning the broadcasters (that is, the Australian Broadcasting Corporation and the Special Broadcasting Service Corporation, respectively) are the owners.

48 Where a news outlet's owner(s) were identified in more than one data source and the owners listed were not the same, we followed the data selection approach outlined in Appendix F.

Examples of ownership

Owner as an individual

The Halls Creek Herald is a newspaper published in the Shire of Halls Creek in WA. Its 'entity name' in the ANI is recorded as an individual person who is listed in the ABN register as an individual/sole trader. Therefore, this person is the owner.

Owner as an entity

The 'news business corporation' recorded for Sky News on the ACMA register of eligible news businesses is 'Australian News Channel Pty Ltd'. In this case, as the news business corporation is mostly equivalent to how we define owner (discussed further in Appendix F), we record Australian News Channel Pty Ltd as the owner of Sky News' subscription TV, news website/app and email newsletter outlets.

While Sky News is also broadcast on free-to-air TV in some areas under the name 'Sky News Regional', we have not recorded a free-to-air TV outlet for Sky News. This is because Sky News Regional is broadcast by different licensees (owners), WIN and Southern Cross Austereo (SCA), for whom we do count free-to-air TV outlets. However, as individual channels (or programs) are not captured under the 2024 Framework, we do not record a standalone outlet for Sky News Regional.

We identified 881 owners of the 1,818 news brands. The 10 owners with the most news brands are shown in Table 3. By this measurement, the public broadcasters (that is, ABC and SBS) have the most outlets, reflecting their flat ownership structures, wherein all their brands are owned by a single owner entity. While these 10 owners account for about 1% of total owners identified under the Framework, together they own 28% (502) of all brands.

Table 3: Top 10 owners by number of news brands

Owner	Number of news brands
Australian Broadcasting Corporation	168
Special Broadcasting Service Corporation	93
News Corp Australia Pty Limited	43
Nationwide News Pty. Limited	35
Rural Press Pty Limited	36
Top End Aboriginal Bush Broadcasting Association	33
Southern Cross Austereo Pty Ltd	30
Nine Entertainment Co. Holdings Limited	24
Queensland Newspapers Pty. Ltd.	21
Central Australian Aboriginal Media Assoc (Aboriginal Corporation)	20
Total	**502**

Networks

The extent to which news outlets or brands are part of a 'network' is not explicitly defined in legislation. The media diversity rules under the BSA look at control of 'media groups', which means a group of 2 or more commercial broadcasters or associated newspapers with one or more shared controller(s). In the 2024 Framework, we have extended this approach and use network to refer to a group of professional news outlets, spanning at least 2 news brands, that share at least one owner and/or controller. As we only have control data for the outlets subject to media control rules, we have identified most networks based on shared ownership.

Brands identified as belonging to a network are called 'networked brands'. A brand cannot be assigned to more than one network under the 2024 Framework (see Appendix F and next steps below). Brands that are not identified as belonging to any network are referred to as 'independent brands'.

> *Joint ventures*
>
> Joint ventures describe the joint control of one or more outlets between 2 unrelated networks. Although it is possible for joint ventures to contain a single news brand, we represent them as networks in the interactive data reports. They are identified by the names of the 2 relevant networks, followed by the 'JV' abbreviation.
>
> *Example of a joint venture*
>
> The ACMA has been notified that entities associated with the WIN and Seven networks are in a position to exercise control of 4 commercial TV broadcasting licences (called free-to-air TV outlets under the Framework) in WA. Seven and WIN are identified as separate networks under the Framework. We therefore record these 4 outlets as part of the WIN Network/ Seven Network joint venture.

We identified 106 networks using available ownership and control data. Of these 106 networks, we found:

- 6 are joint ventures
- 69% of brands (1,262) belong to a network
- 556 independent brands (31%) do not belong to any identified network.

The 10 networks with the most brands are shown in Table 4. These 10 networks account for 9% of networks but comprise 62% (780) of networked brands, or 43% of all news brands.

Together, the 10 largest networks account for 21% (187) of all owner entities, with all except 2 (ABC and SBS) having more than one owner entity. However, there can be significant differences in how the ownership of networks is structured.

For example, Southern Cross Austereo's 131 news brands are owned by 58 owner entities. By contrast, News Corp Australia's 119 news brands are owned by only 6 owner entities. As a result, 3 of this network's owner entities (News Corp Australia Pty Limited, Nationwide News Pty. Limited and Queensland Newspapers Pty. Ltd.) appear in the previous table (Table 3) among the top 10 owners by number of news brands. This reveals how looking at direct ownership alone may obscure the concentration of the news market.

This reveals that looking at direct ownership alone may not provide a complete picture of networks that operate across the news market, and their ownership.

Table 4: Top 10 networks by number of news brands

Network	Number of news brands	Number of owner entities
ABC	168	1
Southern Cross Austereo	131	58
News Corp Australia	119	6
SBS	93	1
Australian Radio Network	54	38
Australian Community Media	50	12
Seven Network	47	19
Super Radio Network	44	29
Nine Network	40	17
Today News Group	34	6
Total	**780**	**187**

Networked outlets lead share of attention

Share of attention is an estimate of relative attention that consumers give to news outlets.

In the indicator 1 interactive data report, we rank the 20 Australian news outlets[49] with the greatest share of attention in Australia, which mostly comprises outlets that are part of networks.

Of the 20 outlets with the greatest share of attention:

- all but 2 (Guardian Australia (news website/app) and Daily Mail (news website/app)) are notionally identified as part of a network[50] under the Framework
- most outlets (16) notionally belong to one of the 10 largest networks (see Table 5), however, half of the largest 10 networks have no outlets represented in the top 20 outlets with the greatest share of attention
- the network with the most outlets in the top 20 is the ABC (7 outlets), followed by the Nine Network (5 outlets) and News Corp Australia[51] (4 outlets).

49 Use of the term ‘outlet’ here reflects its use in the ACMA annual consumer survey (used to calculate share of attention), which is different to the meaning of this term in other parts of this chapter.

50 Foxtel (which broadcasts Sky News Australia, which is part of the News Corp Australia network) and Sky News Regional are considered part of the News Corp Australia network for the purposes of this analysis. However, Telstra partly owns Foxtel and Sky News Regional is broadcast on free-to-air TV by licensees (owners) who are not owned by News Corp Australia.

51 Foxtel (which broadcasts Sky News Australia, which is part of the News Corp Australia network) and Sky News Regional are considered part of the News Corp Australia network for the purposes of this analysis. However, Telstra partly owns Foxtel and Sky News Regional is broadcast on free-to-air TV by licensees (owners) who are not owned by News Corp Australia.

Another way of looking at the potential reach and influence of networks is by the number of broadcast service licences they have been issued by the ACMA. Control of commercial TV broadcast licences is mostly concentrated across 5 networks (see Table 5).

Table 5: Top 5 networks by number of commercial television broadcasting licences

Network	Number of broadcast service licences
WIN Network	16
Southern Cross Austereo	15
Seven Network	14
Nine Network	7
Network 10	5

Of these networks, 4 also have joint-venture arrangements and therefore share control of additional TV licences.

Control of commercial radio licences is mostly concentrated across 9 networks (see Table 6).

Table 6: Top 9 networks by number of commercial radio broadcasting licences

Network	Number of broadcast service licences
Southern Cross Austereo	86
Australian Radio Network	54
Super Radio Network[52]	44
ACE Radio	18
Resonate Broadcasting[53]	12
Capital Radio Network	9
NOVA Network	8
Sports Entertainment Group[54]	7
Nine Network	7

As with commercial television, 3 of these networks also have joint-venture arrangements and therefore share control of additional radio licences.

52 This includes one Section 40 Non-BSB commercial radio licence that is not subject to the media control or media diversity rules under the BSA.
53 This includes 2 Section 40 Non-BSB commercial radio licences that are not subject to the media control or media diversity rules under the BSA.
54 This includes 3 Section 40 Non-BSB commercial radio licences that are not subject to the media control or media diversity rules under the BSA.

Table 7 shows that many of these radio networks are at the limit (prescribed in the BSA) of 2 commercial licences per radio licence area, in many regional and metropolitan markets.

Table 7: Major radio networks at the maximum allowable radio control limit

Radio network	Number of licence areas at maximum allowable control limit			Metropolitan licence areas (RA1)
	Total	Regional	Metropolitan	
Southern Cross Austereo	40	35	5	Adelaide, Brisbane, Melbourne, Perth, Sydney
Australian Radio Network	23	20	3	Adelaide, Melbourne, Perth
Super Radio Network	17	17	0	N/A – regional only
ACE Radio	9	8	1	Melbourne
NOVA Network	4	0	4	Adelaide, Brisbane, Melbourne, Sydney
Nine Network	3	0	3	Brisbane, Melbourne, Perth
Resonate Broadcasting	3	3	0	N/A – regional only

Controllers (for outlets subject to media control rules)

The Explanatory Memorandum to the BSA notes that 'control' is intended to have a very broad meaning, 'covering a wide range of formal and informal arrangements whereby a person becomes in a position to exercise control over a broadcasting service licence, a company or a newspaper'. While ownership of shares (or other company interests) – exceeding 15% – is one way that a person (or entity) can be regarded as being in a position to exercise 'control', other examples of control identified in the BSA include where a person:

- is the licensee
- can control the selection or provision of a significant proportion of the licensee's programming
- can control a significant proportion of the operations of the company
- can appoint, secure or veto the appointment of at least half of the board of directors
- can exercise direction or restraint over any substantial issue affecting the management or affairs of the licensee or company.

Given the complexities involved, it is not feasible to capture every circumstance in which a person may exercise control and therefore, the BSA provides the ACMA powers to investigate and determine whether a person is in a position to exercise control.

We also note that while control data allows us to identify individuals and/or entities in a position to exercise control over news outlets, in practice, an individual or entity being *in a position to* exercise control over a news outlet does not necessarily mean they *do* exercise control over a particular news outlet (for example, a subsidiary company created for shareholding purposes may be in a position to exercise control over a news outlet under the BSA, but in practice, may not exercise control over that particular outlet).

Availability and treatment of control data

We refer to 'unique' controllers throughout this chapter (as opposed to 'total' controllers). Looking at unique controllers ensures that individuals or entities in a position to exercise control of more than one outlet are not counted more than once, reflecting a more accurate view of the concentration of media control.

As previously noted, control data is only available for the 12% of outlets subject to media control rules. As a result, many owner entities, brands and networks identified under the Framework comprise outlets with unknown controllers. This reflects the current legislative settings outlined at the beginning of this chapter.

Example

The Daily Telegraph's print newspaper is classed as an associated newspaper and therefore its 11 controllers are disclosed on the ACMA's media control database.

We know from other data sources that in addition to its newspaper outlet, the Daily Telegraph also has email newsletter and news website/app outlets.

However, the Daily Telegraph's 11 controllers are only recorded for its newspaper outlet under the 2024 Framework. Controllers of its other outlets are unknown.

The ACMA media control registers record 441 unique controllers (and 228 unique owners) for the 354 outlets subject to media control rules. These outlets consist of 65 commercial free-to-air TV outlets, 261 commercial radio outlets and 28 (associated) newspaper outlets.

We first look at control of outlets subject to media control rules by owner entity (see Table 8). The top 10 owners account for 4% of (the 228) owners but own 16% (58) of outlets subject to media control rules. These outlets are controlled by 10% (45) of total unique controllers.

Table 8: Top 10 owners by number of news outlets subject to media control rules

Owner	Number of news outlets subject to media control rules	Number of unique controllers per owner
Ace Radio Broadcasters Pty Limited	12	5
Regional Broadcasters Australia Pty Limited	7	5
North West Radio Pty Ltd	6	7
Resonate Regional Radio Pty Ltd	6	8
Win Television SA Pty Ltd	6	7
Queensland Newspapers Pty. Ltd.	5	10
Elldale Pty Ltd	4	6
Radio West Broadcasters Pty Ltd	4	6
Regional Television Pty Limited	4	8
Resonate Broadcasting Pty Ltd	4	3

We then look at control of the networks that have the most outlets subject to media control rules (see Table 9). Together, these 10 networks account for 84% (298) of total outlets subject to media control rules, which are controlled by 69% (303) of total unique controllers.

Table 9 also shows the number of 'unique controllers' per network, which may provide an insight into how a corporate group is structured. For example, a larger number of unique controllers may indicate an ownership structure comprising a parent company with one or more subsidiaries, all of whom have a direct or indirect interest in a licensee or publisher and are therefore also considered to be unique controllers (in addition to the licensee or publisher itself).

That said, the number of controllers or outlets for each network represented in Table 9 may not equal the total number of controllers or outlets for these networks. For example, News Corp Australia has over 200 more outlets than are shown in Table 9, as these outlets are not subject to media control rules, and therefore their control is unknown.

Table 9: Top 10 networks by number of news outlets subject to media control rules

Network	Number of news outlets subject to media control rules	Number of unique controllers per network
Southern Cross Austereo	101	88
Australian Radio Network	54	44
Super Radio Network	43	33
ACE Radio	18	7
WIN Network	18	22
Nine Network	16	33
Seven Network	16	46
Australian Community Media	11	23
News Corp Australia	11	14
Resonate Broadcasting	10	10

Multi-network controllers

We have identified 19 controllers (see Appendix E) as being in a position to exercise control of 2 or more outlets across 2 or more networks. While these groups of outlets that share a common controller meet the definition of a network, they are not counted as part of a second network (discussed in Appendix F).

Example

Lachlan Murdoch is the chair of News Corporation (the parent entity of News Corp Australia) and owns a 100% stake in NOVA Entertainment. Mr Murdoch has notified the ACMA that he is in a position to exercise control of the NOVA Entertainment commercial radio licences and the News Corp Australia associated newspapers. However, because these outlets are already part of News Corp Australia or NOVA Network, they are not assigned to a second network.

Finally, we look at the 10 individuals and entities in a position to exercise control of the most outlets subject to media control rules (see Table 10). Together, these 10 controllers are in a position to exercise control of 58% (205) of these outlets, that sit across 7 different networks.

Excluding the 4 joint ventures, these 10 controllers sit across 3 main networks – Southern Cross Austereo, Australian Radio Network and Super Radio Network. It is also notable that 7 of the 10 controllers listed in Table 10 have a connection to Southern Cross Austereo, indicating how differences in ownership and control structures can impact the data presented.

Table 10: Top 10 controllers by number of news outlets subject to media control rules

Controller	Number of news outlets subject to media control rules	Network/s (that outlets belong to)
Southern Cross Austereo Pty Ltd	106	Southern Cross Austereo Southern Cross Austereo/Imparja JV Australian Radio Network/Southern Cross Austereo JV Nine Network/Southern Cross Austereo JV
Southern Cross Media Australia Holdings Pty Limited	106	Southern Cross Austereo Southern Cross Austereo/Imparja JV Australian Radio Network/Southern Cross Austereo JV Nine Network/Southern Cross Austereo JV
Southern Cross Media Group Limited	106	Southern Cross Austereo Southern Cross Austereo/Imparja JV Australian Radio Network/Southern Cross Austereo JV Nine Network/Southern Cross Austereo JV
ARN Media Limited	58	Australian Radio Network Australian Radio Network/Nova Network JV Australian Radio Network/Southern Cross Austereo JV
Australian Radio Network Pty Limited	58	Australian Radio Network Australian Radio Network/Nova Network JV Australian Radio Network/Southern Cross Austereo JV
Regional Radio No. 2 Pty Ltd	55	Southern Cross Austereo
Broadcast Operations Pty. Limited	43	Super Radio Network
Despina Priala	43	Super Radio Network
George Caralis	43	Super Radio Network
Regional Broadcasters Australia Pty Limited	37	Southern Cross Austereo

The availability of control data also allows us to explore how the number of controllers has changed over time, relative to the number of news outlets subject to media control rules.

Table 11: Number of news outlets subject to media control rules and number of unique controllers, 2019 to 2024

	2019	2020	2021	2022	2023	2024
Number of unique controllers as at 31 December*	467	448	445	444	442	441
Number of news outlets subject to media control rules as at 31 December*	370	360	358	358	358	354

* As at 17 December for 2024.

The data reveals the number of news outlets and unique controllers have both decreased since 2019; news outlets by 16 and controllers by 26.

Importantly, a decrease in the count of outlets does not necessarily reflect the closure of outlets. For example, a newspaper only becomes subject to media control rules and has its controllers published on the ACMA's media control registers when it meets the criteria to be classed as an 'associated newspaper' under the BSA. This means a newspaper may remain active and counted under indicator 3 (professional news outlets) after the outlet and its controllers have been removed from the ACMA's media control registers.

While the 2024 Framework does not include historical data for other outlets, PIJI has observed a decline in the number of outlets since 2019.[55] This research and our intention to add historical outlet data to future iterations of the Framework is discussed in chapter 6.

Discussion

While the owner(s) of most outlets is known, our capacity to draw definitive and comprehensive conclusions about the diversity of ownership and control of the Australian news market is limited by the availability and nature of control data (and to a lesser extent, parent entity data). As previously noted, an individual or entity being *in a position* to exercise control over a news outlet does not necessarily mean they *do* exercise control over a particular news outlet.

However, understanding who controls outlets may offer deeper insights than simply knowing who owns them or even knowing their parent entity. This is because some ownership structures can obscure the composition of networks and therefore, concentration in the control of outlets. For example, the 10 largest networks appear significantly more diverse if we instead consider the number of owner entities (187) or news brands (780) they comprise.

While many of these brands have been assigned to a network based on the identification of a common parent entity, ownership is only one of many forms of control, and comprehensive control data is only available for the approximately 12% of professional news outlets that are subject to media control rules. It is also difficult to draw broader meaning from the available data because these outlets are not necessarily representative of the current composition of the news market. The limited availability of control data also means the count of networks identified could be an undercount in some areas (for example, several outlets with distinct ownership structures that have been marked as independent may have common controllers and be part of a single network), or an overcount in others (for example, 2 networks formed on the basis of common ownership may in fact be a single network linked by common controllers).

55 G Dickson and J Des Preaux, 'Australian News Data Report: September 2024', Public Interest Journalism Initiative, 2024, accessed 5 December 2024.

Assessment under the current media control rules

In 29 of the 105 commercial radio licence areas in Australia (28%), the number of 'voices' (that is, commercial radio licences, commercial television licences and associated newspapers) exceed the minimum required number under the relevant rule (4 in regional areas, 5 in metropolitan areas). It is particularly notable that this includes all the metropolitan licence areas (except Western Suburbs Sydney), which account for around 60% of the Australian population. In these markets, the number of voices exceeds the minimum required of 5, including Sydney (9 voices), Melbourne (9 voices) and Brisbane (7 voices).

In regional and remote markets, the diversity of voices is comparatively less. For example, in 76 of the 105 licence areas across Australia (72% of total licence areas), the number of voices is either at the minimum allowable level (43% or 45 licence areas), or below it (30% or 31 licence areas).[56] Of these 76 licence areas, all but one (Western Suburbs Sydney) are regional or remote licence areas.

While further data is needed to draw more definitive and comprehensive conclusions, some important observations can still be made from the available data. Although there are no legislated rules to assess the diversity of ownership and control in the broader Australian news market, the 106 networks identified offer some insights.

This data reveals the Australian news market is highly networked (69% of news brands are part of a network), with the 10 largest networks comprising a significant portion (43%) of all news brands identified under the Framework. Data from the ACMA annual consumer survey further reveals that, unsurprisingly, this often translates to a greater share of attention compared to smaller networks or independent brands, with some notable exceptions.

This may assist to explain why networking is so prevalent in the Australian news market. Future research may examine other factors that contribute to the establishment of networks, including geography and population, economic efficiencies, and promotional opportunities, and implications for content and exposure diversity.

Next steps

We have identified several potential approaches to address or otherwise reduce the impact of identified data gaps and expand our insights into ownership and control, as outlined below.

Control data

As robust control data is important to understand the diversity of the Australian news market, the ACMA will explore the potential to obtain control data for professional news outlets not subject to media control rules. Preliminary exploration into using commercial datasets to identify news outlet controllers identified privacy and commercial issues that require investigation. We will continue to explore the feasibility of this and other approaches in consultation with relevant stakeholders.

56 Although the BSA prohibits transactions that cause a licence area to have fewer than the required number of voices, a licence area may have fewer than the required number without a breach occurring. This can be where a licence area already had below the required number of voices when the 5/4 voices rule was introduced in 2006, or where an existing independent media operation ceases to be covered by the rule – for example, if a newspaper ceases to be associated with the licence area or ceases to be published altogether.

Ownership data

While the availability of control data remains limited, a complete view of the ownership of news outlets assumes greater importance. As with control data, commercial datasets have the potential to resolve or reduce the gaps identified in this chapter. The continued implementation of the Framework monitoring and desktop research strategy (see Appendix D) provides another option to address these gaps.

Network data

Addressing the above gaps, particularly in control data, will improve our ability to identify networks. We anticipate any new control data will also help to identify more multi-network controllers (see Appendix E). We will explore the feasibility of including ‘secondary networks’ formed via multi-network controllers to provide a richer and more complete view of networks in future reports.

Other media groups

We are aware of other types of media groups that are not based on ownership or control. For example, shared administrative and governance arrangements, typically among some smaller community radio broadcasting licensees. We are also aware of some unrelated outlets that share or co-produce news content. For example, use of syndicated content across outlets has been documented in PIJI’s Australian News Sampling Project (see chapter 7). While these types of arrangements can assist news outlets – particularly smaller organisations – by providing shared resources, content or expertise, they are not represented under the 2024 Framework. We will continue to explore these trends and, if appropriate, consider how best to represent these types of groups in the future.

Geographic analysis of ownership and control

The current media diversity rules under the BSA allow the diversity of ownership and control to be examined in individual markets, which are based on commercial radio broadcast licence areas. We will consider whether geographic analysis of ownership and/or control, potentially using local government areas, can be included in future reports.

Development of a searchable database

We will explore the feasibility of developing a database, comprising indicator 1 and indicator 3 (professional news outlets) data. Making this data publicly available will provide greater transparency and enable stakeholders to contribute to its accuracy and completeness.

5.

Indicator 2: professional news workforce

How many journalists, editors and other media professionals contribute to the production of professional news in Australia?

Key insights

- The total number of journalists in Australia decreased considerably from 2011 to 2021. Data from the 2021 Census shows there were 13,108 journalists – a 19% decrease from 16,125 in 2011.
- The number of print journalists decreased the most, halving between 2011 and 2021.
- The exception to this trend was growth in the 'Journalists and other writers: not further defined' subcategory, which increased from 2,125 in 2011 to 2,969 in 2021 (up 40%). This likely reflects a growing trend for those with journalism skills to engage in professional activities outside of the newsroom.

➔ View the **interactive data report** for indicator 2.

Introduction

The size and make-up of the journalist workforce and the nature of the journalism profession are crucial aspects of the media diversity landscape. Understanding who is contributing to the production of news, and where and how, can provide important insights into the diversity of voices present across news markets.

Changes across the industry have resulted in media businesses, often in response to decreasing revenue, seeking to cut operational costs by reducing journalists and editorial staff and, in some cases, closing entire newsrooms.[57] This overall decrease in traditional journalism jobs and the increasing application of journalism skills in journalism-adjacent roles presents new and complex challenges to monitoring the journalism profession, as explored in this chapter.[58]

Scope of the 2024 Framework

The 2024 Framework measures the journalism workforce using Australian Bureau of Statistics (ABS) Census data.

This data is broken down by:

- journalist subcategory (see Appendix F for more information)
- state/territory (usual residence)
- sex (see notes on *Demographic data* in chapter 3 for limitations).[59]

57 Australian Competition and Consumer Commission, *Digital Platforms Inquiry: Final Report*, July 2019, accessed 15 October 2024, Chapter 6.

58 S Park, J Young Lee and C Fisher, 'Changing journalists occupations: An analysis of Australian Census 2021', *Australian Journalism Review,* 2024, 24(1): 17-31, doi: https://doi.org/10.1386/ajr_00146_1.

59 We note that some third-party analysis of ABS Census data incorporated in this chapter uses the term 'gender' as opposed to sex. While the ABS technically collects this data on the basis of sex, the extent to which the distinction between sex and gender is commonly understood remains unknown. It may be, for example. that some Census respondents provide a gender response to a sex question. The ACMA understands that some academic studies use sex and gender interchangeably. More information on this limitation is provided in chapter 3 and broader context provided via the ABS Standard for Sex, Gender, Variations on Sex Characteristics and Sexual Orientation Variables.

Data sources

Conducted every 5 years, the Australian Census collects data on every person and household in Australia on topics such as age, country of birth, religion, ancestry, languages used at home, work and education.

Occupation data collected is coded by occupation and industry sector. Although this classification has changed over time, the relevant current classification is 'Journalists and Other Writers' as defined by Australian and New Zealand Standard Classification of Occupations (ANZSCO).[60]

Data from the 2011 and the 2021 Census have been obtained, allowing for comparative analysis over this 10-year period.[61] Publicly available data from the 2016 Census was excluded on the basis that it did not provide the necessary subcategory data.

The work of Park, Lee and Fisher provides a detailed analysis of 2021 Census findings in comparison to earlier years and tracks changing dynamics among the journalism workforce. Their work, combined with our own analysis of the 2011 and 2021 Census data and some additional third-party analyses, forms the basis of our insights for this indicator.[62]

Data limitations and gaps

The way Census data for journalists is captured (as outlined above) presents several limitations, as outlined below.

Categorisation of journalists under the Census

As the Census asks respondents to identify their 'main job', it does not accurately capture those contributing to the production of professional news in a volunteer capacity, for whom journalism is a secondary occupation and those contributing to the production of professional news in a capacity that falls outside the 'Journalists and Other Writers' category, for example:

- media producers (such as audio producer, screen producer)
- other media professionals (such as media presenter, film and video editor)
- audio, screen and stage directors
- authors, book or script editors.

Lack of alignment with other indicators

Data collected by the ABS does not align with the professional standards test applied in indicator 3 (professional news outlets). That is, we are unable to determine the extent to which those who self-identify as 'Journalists and Other Writers' in the ABS data, are engaged in the production of 'professional news' as defined in the 2024 Framework. Data presented in indicator 2 may be an overcount to the extent that some employees of non-professional news outlets may be included in the ABS data. Conversely, it is likely to largely exclude volunteers, on whom some professional news outlets, particularly community radio stations, are heavily reliant.

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60 In 2024, ANZSCO was replaced by two separate entities in Australia and New Zealand, with the Australian Standard Classification for Australia (OSCA) succeeding ANZSCO in Australia. More information is provided in Appendix F.

61 2021 data was extracted via TableBuilder. 2011 data was obtained via the *Employment in Culture, Australia*, 2011 report.

62 There are a number of slight variations in the figures provided by Park, Lee and Fisher to those surfaced via our own analysis of ABS Census data. We understand that this is due to the randomisation of data implemented by the ABS to reduce the risk of individual journalists being identified when the data is exported with the required variables. Due to the way we obtained this data, our figures vary at times to those presented by Park, Lee and Fisher. Overall trends remain the same, however, and where discrepancy occurs, this is of a number of 5 or less. Where figures are included in the *analysis* section for this indicator, these are reflective of the ACMA's own analysis of ABS data, rather than that of Park, Lee and Fisher, unless otherwise indicated.

Analysis

The total number of journalists in Australia decreased noticeably from 2011 to 2021. Data from the 2021 Census shows there were 13,108 journalists – a 19% decrease from 16,125 in 2011. Of the 6 subcategories counted, 5 experienced a decrease. The number of print journalists decreased most markedly, down 49% from 2011.

Changing application of journalism skills

The exception to the above trend was the 'not further defined' subcategory, which increased from 2,125 in 2011 to 2,969 in 2021 (up 40%). While this subcategory comprised only 13% of the total in 2011, it jumped to 23% in 2021. This likely reflects a growing trend for those with journalism skills to engage in professional activities outside of the newsroom. There is an increasingly diverse range of industries in which journalists are applying their skills, including advertising services, creative and performing arts, government administration and tertiary education. While overall the top 3 industries employing journalists in 2021 were 'Newspaper, Periodical, Book and Directory Publishing', 'Television Broadcasting' and 'Creative and Performing Arts Activities', multimedia and multitasking journalists are now less likely to be employed at a newspaper company.[63]

As with ABS data, journalism job advertisements highlight the diversification of skills among journalists and the increasing demand for skills outside the fields typically considered to fall within the journalism profession. While the occupations 'Reporter', 'Editor' and 'Copywriter' cover the highest percentage of journalism jobs in the dataset, 'Photography', 'Communications', 'Social Media' and 'Public Relations' experienced higher journalism skill-intensity growth from 2014 to 2018.[64] Similarly, when analysed via a 'skills similarity' approach,[65] 'Social Media' related skills became increasingly relevant for journalists, with the more traditional skills such as 'Editing' and 'Copy Writing' diminishing in relevance, relatively.[66]

Demographic analyses

From 2011 to 2021, the percentage of female journalists increased from 54% to 58%. In their analysis of ABS Census data, Park, Lee and Fisher noted an 89% increase in the number of women with journalism qualifications from 2006 to 2021, compared to a 75% increase for men. However, as the journalism job market has become more volatile, gender inequity has worsened, with women journalists who remain in the workforce generally younger and paid less than men. While both journalism job advertisements and ABS data revealed a higher percentage of women employed as journalists over time, the study found that, from 2014 to 2018, the annual salaries for female journalists increased by $3,000 – only 10% of the wage growth experienced by male journalists (over $30,000) for the same period.[67]

63 Park et al., 'Changing journalists occupations: An analysis of Australian Census 2021', 23.

64 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', 548–549.

65 A methodology adapted from Alabdulkareem et al. (2018) and then by Dawson et al. (2019), Dawson et al. (2021) note that this approach deploys a logic whereby 2 skills are similar when the 2 are related and complementary. The similarity of skill-pairs is measured based on their co-occurrence in job ads, while accounting for skill ubiquity and specialisation. To capture changes in journalism skills over time, the authors measured skill similarity during calendar years. For more information, see Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020'.

66 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', 548.

67 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', 554.

2021 Census data also revealed that male journalists (76%) were much more likely to be employed full-time than female journalists (63%). At the same time, the percentage of male journalists employed full-time decreased from 81% in 2011. In their analysis, Park, Lee and Fisher note that '[a]lthough the gender gap in full-time employment seems to have narrowed somewhat, senior female journalists are still less likely to secure a full-time position compared to their male colleagues.'[68]

Louise North's 2016 research pointed to gendered divisions of labour within the workforce, where the majority of female reporters were assigned to 'soft-news' areas, such as arts, education and health.[69] Research from iSentia produced similar findings. Their Women in Media Gender Scorecard analysed 18,346 press, radio and TV reports over a 14-day period in July 2022 and found that male journalists dominated in most prolific areas of media, such as sport, finance and politics. Conversely, female journalists were found to have higher representation in covering the topics of health and crime/justice/law and order (these topics together comprised 17% of total industry coverage) only.

In terms of location, the spread of journalists across Australian states and territories was largely consistent between 2011 and 2021. The percentage of journalists in Queensland decreased from 14% to 13%, while the percentage of journalists in the ACT increased from 3% to 4% between those years. New South Wales had the largest percentage of journalists, 42% and 43% in 2011 and 2021 respectively. While analysis revealed a higher percentage of job advertisements in regional areas (peaking in 2017), the authors contend that this is unlikely the result of a higher number of journalism jobs in regional areas overall, but rather that the journalism industry 'is even more volatile in the regions than in major urban centres'[70], potentially meaning higher rates of staff turnover. This hypothesis may be supported by the significant number of local and regional newspaper titles that have closed across Australia, including 106 (15% of such publications) between 2008 and 2018 alone.[71]

When looking at age, the 'not further defined' and 'Bloggers, Critics, Sports and Other Writers (not elsewhere covered)' categories comprised a larger proportion of young journalists (aged 20–29, 38%) compared to older journalists (aged 40–59, 35%).[72] While the data revealed younger journalists (20–29 years) were more likely to be employed full-time than older journalists, compared to the same cohort in 2011 (82%), younger journalists were less likely to be employed full-time in 2021.[73]

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68 Park et al, 'Changing journalists occupations: An analysis of Australian Census 2021', 24. doi: https://doi.org/10.1386/ajr_00146_1

69 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', 551. doi: https://doi.org/10.1177/1464884921996286

70 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', 531. doi: https://doi.org/10.1177/1464884921996286

71 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', 534. doi: https://doi.org/10.1177/1464884921996286

72 Park et al., 'Changing journalists occupations: An analysis of Australian Census 2021', 24. doi: https://doi.org/10.1386/ajr_00146_1

73 Park et al., 'Changing journalists occupations: An analysis of Australian Census 2021', 25. doi: https://doi.org/10.1386/ajr_00146_1

Employment status, work hours and salaries

Overall, Census data revealed that the proportion of full-time journalists decreased from 71% in 2011 to 69% in 2021. Employment status differed among the 6 categories, with print journalists (69%) less likely to have a full-time position compared to television (86%) and radio (75%) journalists in 2021. Journalists in the 'not elsewhere covered' subcategory were found to have a much lower full-time employment rate (60%) compared to other subcategories.[74]

Weekly work hours were found to be generally consistent across all 6 subcategories in 2021. television journalists were working slightly longer hours (40 hours weekly, median) than their colleagues in other subcategories. They were also, however, found to be earning more than journalists in other subcategories, with a median income of $1,779 per week.[75]

Comparisons of job advertisement salaries with ABS reported wage data for the 'Journalists and Other Writers' category revealed 2 key trends. First, that according to job advertisement data, journalists in 2018 attracted wage increases of approximately $10,000 less than the market average.[76] However, this contradicted wage earnings data collected by the ABS, which indicated journalists had been experiencing wage growth above the market average since 2014. The discrepancy was explained by job advertisements over-representing occupations in the 'Professional' and 'Manager' classes (citing Carnevale et al., 2014), which typically attracted higher wages. This means that the average salary levels found in job advertisement data were approximately $20,000 higher than average salary levels from ABS data, from 2014 to 2018. Secondly, the data revealed that journalist salaries increased in both absolute and relative terms compared to average market levels, between 2012 and 2018 in both data sources. Significantly, the relative salary growth of journalists exceeded the market averages during this period.[77]

Discussion

The journalism workforce, as traditionally conceived, appears to be decreasing in size, as evident in both ABS Census data and analyses of journalism job advertisements. In their 2021 analysis of journalism job advertisements, Dawson, Molitorisz, Rizoiu and Fray highlight the wealth of research domestically and internationally regarding the crisis facing journalism, and note the commonly cited figure that 3,000 journalism positions were lost in Australia in the decade following 2011.[78] The authors link this to the onset of the internet and its impact on advertising, a 'crisis' for journalism that worsened significantly during COVID-19. While journalism job advertisements decreased most markedly from 2016 onwards, 2012 is typically described as a 'watershed' year, in which an estimated 1,500 journalists were made redundant.[79]

74 Park et al., 'Changing journalists occupations: An analysis of Australian Census 2021', 24. doi: https://doi.org/10.1386/ajr_00146_1.

75 Park et al., 'Changing journalists occupations: An analysis of Australian Census 2021', 25. doi: https://doi.org/10.1386/ajr_00146_1.

76 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', 541. doi: https://doi.org/10.1177/1464884921996286.

77 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', 542. doi: https://doi.org/10.1177/1464884921996286.

78 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020, 532. doi: https://doi.org/10.1177/1464884921996286.

79 Dawson et al., 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', 539. doi: https://doi.org/10.1177/1464884921996286.

Insights across other indicators of the 2024 Framework mirror these trends. For example, data from indicator 5 (news consumption) reveals a decrease in news consumption and a plateau in the number of Australians willing to pay for news, which may in part explain the decreased demand for traditional journalism and journalists. Likewise, the increasing tendency of Australians to use digital platforms to access news appears to be consistent with the diversification of skills among journalists, and the overall decline of journalists working in traditional formats, such as print.

The rapidly changing nature of the profession, including the widespread digitisation of journalism and, more recently, the emergence of generative artificial intelligence, has resulted in increasing fragmentation and precarity, and the growing need for those with journalism skills to engage in professional activities outside of the newsroom.[80]

The boundaries of the journalism workforce have become increasingly porous, with a host of new communications roles providing opportunities for journalists to use their skills in other settings.[81] The rise of 'platform journalism' (combining the features of social media content, such as calls to action and conversational tone, with journalism ideals and original investigation)[82] and 'citizen journalism' (journalism content captured and shared/published by citizens),[83] among other forms of production, is further challenging traditional notions of who, and what, is a journalist.

Changes across the industry have resulted in media businesses, often in response to decreasing revenue, seeking to cut operational costs by reducing journalists and editorial staff and, in some cases, closing entire newsrooms.[84] This overall decrease in traditional journalism jobs and the increasing application of journalism skills in journalism-adjacent roles presents new and complex challenges to monitoring the journalism profession.[85]

While this indicator relies primarily on ABS Census data to measure the journalism workforce, we have also outlined the limitations of this approach. Further information on these limitations is provided in Appendix F. Park, Lee and Fisher's study also discussed these limitations, highlighting the need for a more nuanced range of categories if the breadth of this rapidly changing profession is to be accurately captured. The authors note that, in doing so, 'the porous boundaries of journalism may be revealed to be more vulnerable than previously thought ... heighten[ing] speculation about journalism's right to claim a professional boundary between itself and other adjacent communication roles.' They conclude, however, that 'only with accurate ongoing monitoring will the health of journalism in Australia be truly established.'

80 See, for example, N Dawson, S Molitorisz, MA Rizoiu and P Fray, 'Layoffs, inequity and COVID-19: A longitudinal study of the journalism jobs crisis in Australia from 2012 to 2020', *Journalism*, 2021 (21)3: 531-559, doi: https://doi.org/10.1177/1464884921996286; L Zion, T Marjoribanks and P O'Donnell, 'Who is a journalist now? Recognising atypical journalism work in the digital media economy', *Media International Australia*, 2022, 192(1): 81-114, doi: https://doi.org/10.1177/1329878X221134207.

81 M Carlson, S Robinson, SC Lewis, DA Berkowitz, 'Journalism studies and its core commitments: The making of a communication field', *Journal of Communication*, 2018, 68(1): 6-25, doi: https://doi.org/10.1093/joc/jqx006.

82 C Hall, 'The rise of platform journalism', *UTS,* 15 September 2022, accessed 6 September 2024.

83 T Holland, 'Princess Kate-focussed social media frenzy throws citizen journalism into review' *CSU News,* 10 April 2024, accessed 4 November 2024.

84 Australian Competition and Consumer Commission, Digital Platforms Inquiry: Final Report, July 2019, accessed 15 October 2024, Chapter 6.

85 S Park, J Young Lee and C Fisher, 'Changing journalists occupations: An analysis of Australian Census 2021', *Australian Journalism Review,* 2024, 24(1): 17-31, doi: https://doi.org/10.1386/ajr_00146_1.

Next steps

There is significant scope to expand our approach to this indicator in future iterations of the Framework.

In our December 2023 report on the Framework, we committed to exploring opportunities to expand data in this area where possible, by:

1. examining journalism industry definitions and considering advocating for changes as part of the ABS consultations on ANZSCO changes
2. requesting information about journalism staffing numbers directly from news businesses, including information on workforce diversity
3. exploring commercially available data including Telum Media Database, AAP/Margaret Gee's Australian Media Guide and/or iSentia contact lists.

Updates on these commitments are provided below.

- **Examining journalism industry definitions**

  In 2024, we participated in a comprehensive review of the ANZSCO classifications conducted by the ABS, including proposed changes to the 'Journalists and Other Writers' category.

  Informed by stakeholder input, we provided feedback on the proposed changes throughout 2024, noting both potential benefits and risks. We understand the ABS intends to start an ongoing data maintenance program after the release of the updated ANZSCO definitions in December 2024 to allow more frequent, iterative updates. We will seek to continue engagement with the ABS on this work in future.

- **Requesting workforce data from news businesses**

  This was identified as a longer-term commitment that we will continue to explore and hope to include in future iterations of the Framework. We will explore this opportunity with stakeholders from 2025.

- **Exploring commercially available data**

  Over April to June 2024, we undertook a preliminary investigation into the use of a commercial database to source additional data about Australia's professional journalism workforce.

  We decided against using these data sources due to various limitations, including difficulties in extracting the data and methodological issues. However, we will continue to investigate the feasibility of this for future iterations of the Framework.

We will continue to explore these and other suitable opportunities to expand and enhance data and report on this indicator in future.

A significant gap in our approach to measuring the journalism workforce relates to demographic diversity, which is currently limited to a basic breakdown of journalists by sex. This was a topic of significant discussion during 2023 consultations and an area that has been the focus of external research, including:

- Media Diversity Australia's *Who Gets to Tell Australian Stories* series – examining the inclusion and representation of Indigenous and culturally and linguistically diverse news and current affairs presenters and reporters – links a lack of diversity in Australian newsrooms with levels of trust in news, particularly among culturally and linguistically diverse communities. The 2022 report by the Lowitja Institute in partnership with First Nations Media Australia, *Closing the Gap on First Nations peoples representation in the media*, noted the lack of representation of First Nations peoples in Australian broadcasting, journalism and news presentation and the problematic portrayal of First Nations peoples in media more broadly.
- The News and Media Research Centre's *Valuing Diversity in Newsrooms* project considers how audiences and journalists perceive diversity in the Australian news landscape and discusses the many barriers that continue to undermine equitable representation in the industry. These barriers are often compounded for those who experience intersecting forms of marginalisation or discrimination, for example based on race, gender, sexuality, disability, age, religion, refugee and/or migrant status. In 2023–24, a series of resignations and reviews into racism and discrimination in news businesses refocused the national spotlight on the issue of racism in Australian newsrooms and the media industry more broadly, prompting examinations of ways to address these barriers and work towards a media industry that is genuinely representative of (and safer for) a broader section of Australian society.

The ACMA will prioritise exploring these issues in future iterations of the Framework, in consultation with relevant stakeholders. For now, the changing nature of the journalism workforce requires an agile approach to monitoring and measurement, which will need to be prioritised in future iterations of the Framework.

6.

Indicator 3: professional news outlets

How many Australian news outlets are currently producing professional news?

Key insights

- We identified 2,864 professional news outlets across 9 platforms
- The ACMA's regulatory remit only covers the professional news content broadcast on 3 of these platforms (equal to 35% of all news outlets)[86]
- News website/app outlets (1,113) are the most prevalent, followed by radio outlets (880), just over half of which are community broadcasters
- NSW has the most outlets overall (31%), but the NT has the highest proportion of outlets (5%) relative to its population (1% of Australian population).

➔ View the interactive data report for indicator 3.

Introduction

In the third source diversity indicator, we examine the extent to which the Australian news market is populated by a diverse range of outlets that produce, publish or broadcast professional news in Australia (that is, 'professional news outlets'). We measure the diversity of these outlets by their platform and geographic scale. For a news outlet to be considered 'professional' under the Framework, it must meet all the parameters outlined in chapter 3.

Regulation of Australian news outlets

The ACMA is responsible for administering the content rules and broadcasting codes and standards that apply to TV and radio broadcasters. All TV and radio broadcasters must follow rules set out in standards and industry codes of practice developed by industry groups in consultation with the ACMA. Several of these rules apply specifically to news and current affairs programs. For example, many of the codes include a requirement to present news accurately and impartially and to ensure it is distinguished from comment (that is, opinion).

Some regional commercial TV and regional commercial radio broadcasters are also required under the *Broadcasting Services Act 1992* (BSA) to follow other rules on a temporary (if affected by a 'trigger event'[87]) or ongoing basis. These rules can include maintaining a local presence (that is, keeping the same level of staffing and facilities) in, and/or broadcasting material of local significance (which can include local news) about, their licence area.

As discussed in indicator 1 (groups, owners and controllers), a small number of newspapers classed as 'associated' are also subject to the ACMA's media control rules. However, the ACMA's remit does not extend to the content (including professional news) published in these newspapers, or on any other platforms, aside from TV and radio (see Table 12).

86 All percentages provided in this chapter have been rounded to the nearest whole number.

87 For radio, a trigger event is the change in control of the licence, the formation of a new registrable media group or the change of controller of a registrable media group. A regional commercial television licence is affected by a trigger event if, after a change in control, the licence becomes part of a TV network that reaches more than 75% of Australia's population.

The TV and radio outlets whose professional news is regulated by the ACMA comprise 35% (989) of professional news outlets, however this count does not completely reflect current regulatory settings. This is because while we understand the terms radio and TV as inclusive of content conventionally broadcast and streamed via the internet (see the glossary in Appendix B), the rules, codes and standards that apply to radio and TV broadcasters do not apply to content streamed via the internet, regardless of its presentation or provenance.

Table 12: Platforms whose content is within the ACMA's regulatory remit

Platform	Content within the ACMA's regulatory remit?
News website/app	No
Radio	Partly (broadcast only)
Newspaper	No
Email newsletter	No
Free-to-air TV	Partly (broadcast only)
Podcast	No
Magazine	No
Social media	No
Other	No
Subscription TV	Partly (broadcast only)

Scope of the 2024 Framework

The scope of the Framework is significantly broader than the ACMA's regulatory remit, encompassing the 1,875 professional news outlets whose professional news content is *not* regulated by the ACMA. As with indicator 1, this part of the Framework covers all news outlets that publish or broadcast professional news via any of the platforms shown in Table 12. This includes 'other' platforms that have not been explicitly identified and defined under the 2024 Framework. We have taken this approach to ensure the Framework provides as complete a picture as possible of the Australian news market. However, because this wider scope includes outlets that operate outside our regulatory remit, we have needed to combine several ACMA and third-party sources of data.

Data sources

> ***Currency of data***
>
> Data referenced in this chapter was current as of **17 December 2024**.
>
> The corresponding interactive data reports on our website are regularly refreshed with updated data. This means that, over time, some of the numbers in the online reports will vary from those referenced in this chapter.

Reporting on indicator 3 is informed by data from 2 ACMA sources – the Register of Radiocommunications Licences (the RRL) and the register of eligible news businesses. The former contains data about TV and radio broadcasters, while the latter contains data about news businesses that publish content online and are registered by the ACMA under the News Media and Digital Platforms Mandatory Bargaining Code (the Bargaining Code).

We have also integrated data from the Australian News Index (the ANI), a cross-platform database of Australian news outlets and their owners, published monthly by the Public Interest Journalism Initiative (PIJI). ANI data used in this report was current as of 30 November 2024. This source is made available by PIJI under a Creative Commons licence.

To address gaps in the above data sources (where possible), we use the Framework monitoring and desktop research strategy. More information about the strategy and how information collected has been (and will be) used is outlined in Appendix D.

'Community scale' publishers in the Australian News Index

PIJI's ANI includes 81 'community scale news producers'. This grouping does not refer to community broadcasters, but a range of print and digital publishers. PIJI describes these publishers as typically focused on hyperlocal issues, non-commercial and volunteer produced, often on behalf of a local institution such as a community centre or civic organisation.[88] PIJI classes these news producers as 'community scale' as they 'do not provide the depth, consistency or professionalism of local news outlets, but … are important parts of community news provision'.[89]

Notably, unlike other outlets included in the ANI, PIJI does not apply its requirement to adhere to professional and ethical standards to these publishers.

We agree that news outlets that may not meet all Framework or ANI criteria can still play an important role in communities, as highlighted by Case study 1 on Christine Howes' community newsletters. However, the ANI's community scale news producers are not currently included in indicator 3 data on the basis that they have not yet been assessed to determine whether they meet relevant professional standards, as is required of outlets counted under indicator 3. However, where we have identified a community scale outlet in another data source that has a professional standards test, they have been added to indicator 3 data.

Data limitations and gaps

Count of outlets that produce professional news in Australia

Indicator 3 data is likely to present an undercount of professional news outlets for some platforms and an overcount for others. An undercount may exist where data sources have narrower parameters than the Framework (outlined in chapter 3) or do not include comprehensive data for certain platforms (that is, podcasts and social media). Current data may also overcount outlets where the source used has broader parameters than the Framework (see case study 5 in Appendix D) and because we have not excluded outlets from our count unless there is clear evidence that they do not meet one or more Framework parameters (for example, community scale publishers in the ANI).

The use of point-in-time assessments for some data sources to determine whether outlets meet criteria for inclusion means inaccuracies (such as closed outlets being listed as active) may also develop over time.

Use of the term 'professional news outlet' in this chapter should be therefore understood in conjunction with these limitations.

Contextual information about news outlets

We currently do not have complete data about the characteristics of news outlets (for example, their professional news workforce) or the content they produce. While these are limitations of indicator 2 (professional news workforce) and indicator 4 (range and variety of news content) datasets, this lack of contextual information has also impacted indicator 3 by limiting our capacity for deeper analysis and findings about professional news outlets.

88 G Dickson and J Des Preaux, 'Australian News Data Report: September 2024', Public Interest Journalism Initiative, 2024, accessed 5 December 2024.

89 Dickson and Des Preaux, 'Australian News Data Report: September 2024'.

Gaps in the available data also prevented the inclusion in this chapter of 2 metrics (frequency of reporting and focus of news reporting) discussed in our last 2023 Framework report. While we consider these to be potentially valuable metrics for assessing media diversity, it was not possible to obtain suitable data for their inclusion in the 2024 Framework.

Geographic scale limitations

Reporting against geographic scale metrics (except for 'state/territory') is underpinned by accurate mapping of news outlets' coverage of local government areas (LGAs) (that is, 'LGAs covered'). Reliable LGAs covered data can help identify the extent to which different LGAs are served by different news outlets. This data can also help us to understand the extent of outlets' coverage areas ('scale of outlet coverage') and the geographic remoteness of the people who live in each outlet's coverage area ('remoteness of outlet audience').

However, limitations arising from the integration of multiple data sources and the need to use different methodologies for different types of outlets (see Appendix F) meant we have only been able to produce valid insights for geographic scale of outlets at the state/territory level. This chapter does however include further discussion of the analysis we intend to undertake in future reports against the 3 more granular geographic scale metrics mentioned above.

Analysis

Under the 2024 Framework, we explore the diversity of professional news outlets by:

- platform, including broadcast service type
- geographic scale (currently limited to primary state/territory).[90]

This chapter also includes a separate discussion of proposed future analysis of 3 additional geographic scale metrics: LGAs covered, scale of outlet coverage, and remoteness of outlet audience.

Platform

Platforms reveal how news brands present and distribute professional news. We record a separate outlet for each platform. However, we only count one outlet where news content is replicated across more than one location (for example, a print newspaper and a digital replica of that print newspaper available via the internet are considered one outlet).

As shown in Figure 7, we consider The Sydney Morning Herald and Australian Financial Review to be 'news brands' (brands are discussed further in chapter 3) and their newspapers and news website/apps to be separate 'news outlets' (on separate platforms). Because the Framework is platform-neutral, we have not identified a 'primary' outlet (or platform).

90 While we consider state/territory to be part of the 'geographic scale' group of metrics, it has been separated from this grouping in this chapter to signify that we have confidence in the insights we have made about state/territory using the available data.

Treatment of the news website/app platform type

The platform type 'news website/app' can refer to part of a news website/app where it offers substantially different news content (for example, location-based pages). This means the count of news/website app outlets does not reflect the number of standalone news websites and/or apps.

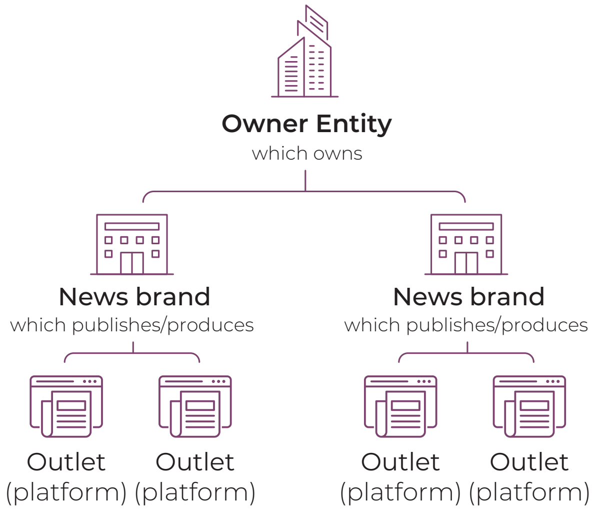
Example

The ABC's website (abc.net.au) has numerous pages, with distinct URLs, that reflect the different geographic locations covered by the public broadcaster (for example, ABC Wimmera, at abc.net.au/wimmera). Where these (or other) distinct location-based pages are included in indicator 3 data sources, we record them as separate news website/app outlets on the basis that they each offer substantially different news content.

As a result, we record 53 news website/app outlets for the ABC.

Radio and TV outlets are also assigned a 'broadcast service type' to reflect the type of broadcast service licence[91] issued to them by the ACMA. While public broadcasters (that is, ABC and SBS) are not required to hold broadcast service licences, their radio and TV outlets are counted under indicator 3, with the broadcast service type 'National Broadcasting'.

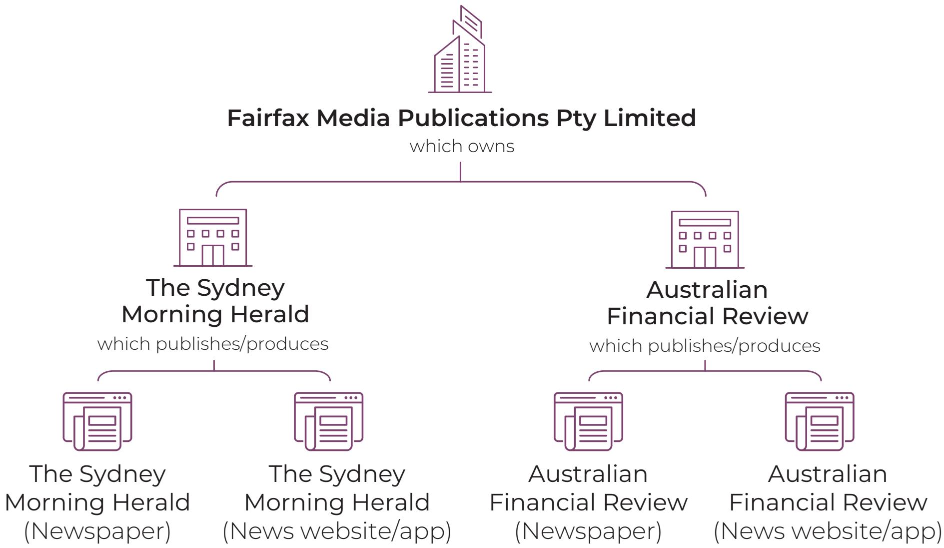
Figure 6: Indicator 3 taxonomy (defined terms)[92]



91 We acknowledge that broadcasters with other types of licences may also broadcast professional news. Where these broadcasters have been identified in other data sources, they have been counted in this part of the Framework.

92 See Appendix B: glossary for definitions of these terms.

Figure 7: Indicator 3 taxonomy (with example)[93]



We have identified 2,864 professional news outlets, comprising 9 platforms (excluding 'other') and 7 broadcast service types. Some digital platforms (social media and podcast) are currently represented in the 'other' category in the interactive data report and below as the number of these outlets identified in existing data sources is likely an undercount.

Of the 2,864 outlets identified, we found:

- the top 3 platforms – news website/app, radio, and newspaper – account for 86% of all outlets, with news website/app comprising the largest portion of all outlets (39%)
- community broadcasters comprise just over half of all radio outlets (51%), but are the least prevalent type of free-to-air TV outlet, comprising just 2% of these outlets
- commercial broadcasters are the second most prevalent type of radio outlet (31%) and the dominant type of free-to-air TV outlet (63%), followed by national broadcasters (that is, ABC and SBS) in both platform categories
- only one outlet in the subscription TV platform category, Sky News.

93 News brands and outlets listed do not necessarily represent an exhaustive list of those owned by the identified owner entity.

Table 13: Platform and broadcast service type by number of outlets

Platform	Broadcast service type (where applicable)	Number of outlets identified under the 2024 Framework
News website/app[94]		1,113
Radio (broadcast or streamed via a website/app)	Commercial Radio Broadcasting	261
	Commercial Radio Broadcasting (Section 40 – Non-Broadcasting Service Bands (NON-BSB))	14
	Community Broadcasting	358
	Temporary Community Broadcasting	89
	National Broadcasting	158
	Total	880
Newspaper (print or digital editions)		478
Free-to-air TV (broadcast or streamed via a website/app)	Commercial Television Broadcasting	68
	Community Broadcasting	2
	National Broadcasting	38
	Total	108
Magazine (print or digital editions)		26
Email newsletter		217
Other[95]		41
Subscription TV (broadcast or streamed via a website/app)	Subscription Television Broadcasting	1

94 The count of news/website app outlets includes parts of news websites/apps where applicable (for example, distinct location-based pages) and therefore does not reflect the number of standalone news websites/apps.

95 Social media and podcast have been incorporated into the 'other' category, until more comprehensive data is obtained.

Primary state/territory

Looking at news outlets by state and territory provides a macro perspective of which parts of Australia are covered by outlets that cover an area smaller than the entire nation. Some outlets that cover all or part of more than one state or territory are assigned a 'primary' state or territory (discussed further in Appendix F). This means that while no outlet is counted more than once in Table 14, the number of outlets serving some states or territories (particularly 'other territories', which are not represented in Table 14) is an undercount.

The 185 (6%) outlets that cover the entire nation are not represented in Table 14.

Table 14: Primary state/territory by number of news outlets

State/territory	Number of news outlets	Population (at 2021 Census)[96]	Total area (km2)[97]
NSW	832	8,072,163	801,150
Vic	537	6,503,491	227,444
Qld	524	5,156,138	1,729,742
WA	309	2,660,026	2,527,013
SA	213	1,781,516	984,321
NT	123	232,605	1,347,791
Tas	104	557,571	68,401
ACT	37	454,499	2,358

Of the 2,679 outlets that have been assigned a primary state/territory, we found:

- the order of states and territories by the number of total outlets aligns with the order of states and territories by their total populations, with the exception of the Northern Territory:
  - the most populous eastern mainland states (New South Wales, Victoria and Queensland), that comprise 78% of Australia's population, are the primary state/territory for 71% of outlets
  - the most populous state, New South Wales, has the most outlets (31%)
  - the ACT has the fewest outlets (1%), but is far smaller than other states and territories, with most of its population concentrated in its only city, Canberra
- the proportion of outlets per state/territory compared to the proportion of population per state/territory is generally equivalent, except for the Northern Territory and Victoria:
  - the NT has the highest proportion of outlets (5%) relative to its population (1% of Australia). Of its 123 outlets, 68% (84) are radio outlets, the highest proportion for any single platform in any state or territory
  - Victoria has the lowest proportion of outlets (20%) relative to its population (26% of Australia). However, it being the smallest mainland state is likely a factor. Of Victoria's 537 outlets, news website/app is the most prevalent platform
- in all but 3 states and territories (Western Australia, Tasmania and the NT) there are more news website/app outlets than any other platform. Elsewhere, radio is the most prevalent platform.

96 Australian Bureau of Statistics (2021), *2021 Census - QuickStats*, accessed 5 December 2024.
97 Geoscience Australia, Area of Australia - States and Territories, Geoscience Australia, n.d., accessed 5 December 2024.

Proposed future analysis of geographic scale

As noted, limitations of available data mean that we are unable to produce reliable insights against the following 3 geographic scale metrics:

- LGAs covered
- scale of outlet coverage
- remoteness of outlet audience.

These metrics are intended to reveal insights about the geographic coverage of professional news outlets and the geographic remoteness of the audience each outlet covers.

Each of these metrics is underpinned by 'LGAs covered' data (that is, which LGAs are covered by which news outlets). However, several challenges prevent us from accurately identifying which LGAs each outlet covers, and therefore the scale of outlet coverage and remoteness of outlets' covered audience, including:

- Some of the available methodologies for determining LGAs covered rely on proxies (for example, broadcast licence areas) that are more likely to reflect access to news outlets in certain locations (as opposed to the geographic focus of outlets).
- LGAs covered have been determined for some outlets whose coverage areas are very large, and whose professional news content is therefore potentially less likely to be focused on every or any particular LGA(s) within its total coverage area.
- As previously noted, the use of several datasets that were not developed for this purpose means some of the outlets we count as 'professional' (and therefore calculate geographic scale for) may not meet all the Framework's criteria.

These challenges are described in further detail in Appendix F.

LGAs covered

Identifying which LGAs are covered by which news outlets is intended to reveal insights about the geographic focus of professional news outlets (as opposed to access to outlets in certain locations) and the extent to which LGAs in different parts of Australia are covered (or not covered) by these outlets. However, as illustrated below, limitations of the available methodologies (see Appendix F) mean the data does not always support this intent.

The challenge of accurately mapping outlets to LGAs: Belyuen Shire

Belyuen Shire (NT) illustrates some limitations of the available data. This LGA, located across the harbour from Darwin, has 149 residents (at the 2021 Census)[98] and is among the least covered LGAs by the apparent number of news outlets (9), based on available data.

However, the challenges outlined above mean this may be an overcount. In this example, the LGAs covered by each of the 9 news outlets were determined using a proxy that is more likely to reflect access to outlets (in this case, broadcast licence area), rather than the geographic focus of those outlets' coverage. This means the number of LGAs covered by each outlet is more likely to be an overcount. Results from PIJI's research (discussed below) further suggest this may be the case.

In PIJI's quarterly September 2024 report, Belyuen is named as one of 5 Australian LGAs without any known local news producer (PIJI excludes TV, because of its widespread availability) and which may, by extension, not be the subject of any consistent news coverage. The previous year, PIJI also assessed the output of a subset of 3 news outlets in the Darwin and surrounds area as part of their Australian News Sampling Project (discussed further in chapter 7) and did not count any stories about Belyuen during the sample period.[99] When PIJI widened their search to news coverage by these 3 outlets from the past year, they counted 6 stories about Belyuen, supporting their designation of Belyuen as an LGA without regular news coverage.

This serves to illustrate why the 9 professional news outlets indicated to 'cover' Belyuen in the available data implies a greater level of news coverage than is likely the reality.

Assuming these 9 outlets do not in fact cover Belyuen, the scale of outlet coverage and remoteness of outlet audience calculated for them would also be unreliable (because these metrics are also underpinned by LGAs covered data).

Scale of outlet coverage

Scale of outlet coverage refers to a news outlet's total coverage area. The purpose of this metric is to measure the total coverage area of outlets that cover one or more specific LGAs. Pending the availability of more accurate data, scale of outlet coverage will be measured using the number of LGAs covered by each news outlet. This data could be reported on an individual outlet basis and/or aggregated to illustrate how many news outlets cover a single LGA or a number of LGAs within a given range, for example, 2 to 5 LGAs, 6 to 10 LGAs, and so on.

While this approach would provide a very broad indication of outlet scale, it will be important to ensure such reporting does not imply that outlets with a similar scale of coverage are homogenous. This is because LGAs vary greatly in both physical size (from 1 to more than 300,000 km2) and population (from less than 100 to more than 1 million people) and these factors have the potential to impact the operation of the outlets that cover specific LGAs.

98 Australian Bureau of Statistics (2021), *2021 Census - QuickStats*.
99 G Dickson, *Australian News Data Report: July 2023*, Public Interest Journalism Initiative, 2023, accessed 17 December 2024.

Remoteness of outlet audience

Remoteness of outlet audience refers to the relative geographic remoteness of people (based on their access to services) who live in a given area covered by a given outlet.

Our classification of 'remoteness' identifies 5 classes of geographic remoteness, based on the approach used by the Australian Bureau of Statistics (who adopted the schema from the Accessibility/Remoteness Index of Australia Plus (ARIA+)).

We have undertaken work to assign each LGA to one of these 5 remoteness classes, as shown in Table 15 (methodology outlined in Appendix F). We intend to apply these 5 remoteness classes in this part of the Framework because of the richer insights they offer into service accessibility in Australia compared to, for example, the metropolitan/regional classification used in indicators 5 and 6.

Our intention is that with more reliable data, this will enable us to assign a remoteness class to each news outlet based on the LGAs it covers, providing a meaningful indication of the relative remoteness of the audience it covers.

Table 15: Remoteness classes by number of LGAs

Remoteness class	Number of LGAs
Major Cities of Australia	136
Inner Regional Australia	132
Outer Regional Australia	140
Remote Australia	62
Very Remote Australia	77

Historical data

The 2024 Framework does not include historical data (as noted below, this data will be a priority for us from 2025). However, PIJI publishes a quarterly historical analysis of the news brands counted in its ANI (including the community scale news producers that have not been counted under indicator 3 of the Framework). While there are several differences between the Framework and ANI (discussed in chapter 3), PIJI's analysis is nonetheless valuable.

At the time of PIJI's analysis in September 2024, the ANI had 1,226 news brands (including 69 community scale publishers),[100] accounting for 63% of brands counted under indicator 3.

Between 1 January 2019 and 30 September 2024, PIJI recorded 183 closures and 159 openings of brands, translating to a net reduction of 23 brands.[101] PIJI records other types of news market expansions (that is, newsroom openings, increases in service and new print editions) and contractions (that is, mergers, the end of print editions, decreases in service and newsroom closures). When factoring in these other market changes, there were 358 contractions and 174 expansions during the same period, translating to a net negative of 184 contractions.[102] According to PIJI, the greatest number of these changes occurred in NSW.

While PIJI records the end of print editions as a contraction, they note that they could also be interpreted as a positive sign of digital transformation. However, even when print edition related market changes are removed from the analysis, PIJI finds the data still reflects ongoing volatility, with a net negative of 72 contractions over the 2019–24 period.[103]

The impact of the COVID-19 pandemic on the Australian news market

While PIJI does not typically examine what causes market changes, they highlight the economic impact of the COVID-19 pandemic on the media sector in their analysis. PIJI reports observing 'significant decreases in news production and availability' following March 2020 when non-essential businesses were first ordered to close.[104] From June 2020, and into the following quarter, the sector stabilised and began to rebound, including through the opening of many independent publishers in areas where large media companies had shuttered in the previous quarter. However, PIJI notes that many of these independent publishers have since closed.

100 Dickson and Des Preaux, 'Australian News Data Report: September 2024'. Public Interest Journalism Initiative, 2024.
101 Dickson and Des Preaux, 'Australian News Data Report: September 2024'. Public Interest Journalism Initiative, 2024.
102 Dickson and Des Preaux, 'Australian News Data Report: September 2024'. Public Interest Journalism Initiative, 2024.
103 Dickson and Des Preaux, 'Australian News Data Report: September 2024'. Public Interest Journalism Initiative, 2024.
104 Dickson and Des Preaux, 'Australian News Data Report: September 2024'. Public Interest Journalism Initiative, 2024.

Remoteness

PIJI also analyses market changes by the remoteness of the LGAs in which they occurred (importantly, PIJI's approach produces a slightly different result to the methodology we use, detailed in Appendix F). They found that the 28% of people who live in LGAs classified as regional or remote experienced disproportionately more market changes (61% of total changes) since 2019, than those who live in major cities,[105] comprising:

- 58% (151) of total contractions, including 67% (122) of all closures and 91% (30) of all decreases in service
- 64% (110) of total expansions, including 62% (98) of all openings.

PIJI also found that the market changes in regional or remote LGAs were 'more substantial … to news provision' than the changes recorded in major cities.[106] For example, 45% (69) of contractions in major cities were print editions ending. However, cuts to print editions only accounted for 14% of contractions in regional and remote LGAs. The proportion of contractions in these areas that are closures (59%) and decreases in service (14%) was also greater than the proportion of closures (40%) and decreases in service (2%) in major cities.

PIJI concludes that while LGAs that have a regional or remote remoteness class account for a greater number of openings, this is outweighed by the impact of market contractions.

Discussion

The extent to which professional news is produced about different parts of Australia, and the range of platforms used to disseminate professional news, are important indicators of the range and relevance of the news content available to Australian communities.

However, as demonstrated throughout this chapter, there are challenges to undertaking robust and comprehensive measurement of professional news outlets using the available data. While to some extent, this limits the conclusions we can make, the identification of these challenges and gaps help to inform our next steps (detailed in the following section).

We count 2,864 professional news outlets, comprising 9 platforms (excluding 'other') and 7 broadcast service types, under the 2024 Framework. News website/app is the dominant platform (1,113 outlets), however the professional news published via news websites/apps and 5 other platforms (65% of all outlets) is not covered by the ACMA's regulatory remit. While the integration of data from PIJI's ANI, and to a lesser extent, the ACMA register of eligible news businesses, improves our view of the Australian news market, we still have limited visibility of some digital platforms, like podcasts and social media pages.

For outlets in our current data, we also examine their geographic scale at a primary state/territory level and find that NSW has the most outlets overall (31%), while the NT has the highest proportion of outlets (5%) relative to its population (1% of Australian population).

We have not produced findings for geographic scale at a more granular level (that is, LGAs covered, scale of outlet coverage and remoteness) due to the limitations of the available data (see Appendix F), however, further work will be undertaken to incorporate this analysis in future reports. Further work is also needed to develop historical outlet data tailored to the needs of the Framework. Concerningly, however, PIJI observes a net reduction in news brands (included on the ANI) since 2019, with this trend particularly apparent in regional and remote LGAs.

105 Dickson and Des Preaux, 'Australian News Data Report: September 2024'. Public Interest Journalism Initiative, 2024.
106 Dickson and Des Preaux, 'Australian News Data Report: September 2024'.

Overall, data in this indicator is uniquely dynamic and is expected to be strengthened and consolidated with the full implementation of the Framework monitoring and desktop research strategy from 2025 (see Appendix C) and the other work outlined in the *Next steps* section below. Despite this anticipated flux, the baseline data reveals that professional news outlets operate across an array of locations and platforms, mostly outside of the ACMA's purview.

Next steps

We have identified several potential approaches to address or otherwise reduce the impact of identified data gaps and expand our insights into news outlets, as outlined below.

Inclusion of historical data

During the implementation phase of the 2024 Framework, we explored whether historical data (back to 2019) could be added to the interactive data report for this chapter. However, we were unable to obtain reliable data for a significant proportion of professional news outlets. As a result, we could not include a time-series chart in the interactive data report or analyse historical data that reflects the full breadth of professional news outlets in this chapter. We will seek to obtain and validate this data as soon as possible.

Implementation of the Framework monitoring and desktop research strategy

We will continue to implement the Framework monitoring and desktop research strategy (outlined in Appendix D) from 2025. The continued implementation of this strategy is intended to assist us in addressing several limitations identified in Appendix F, including:

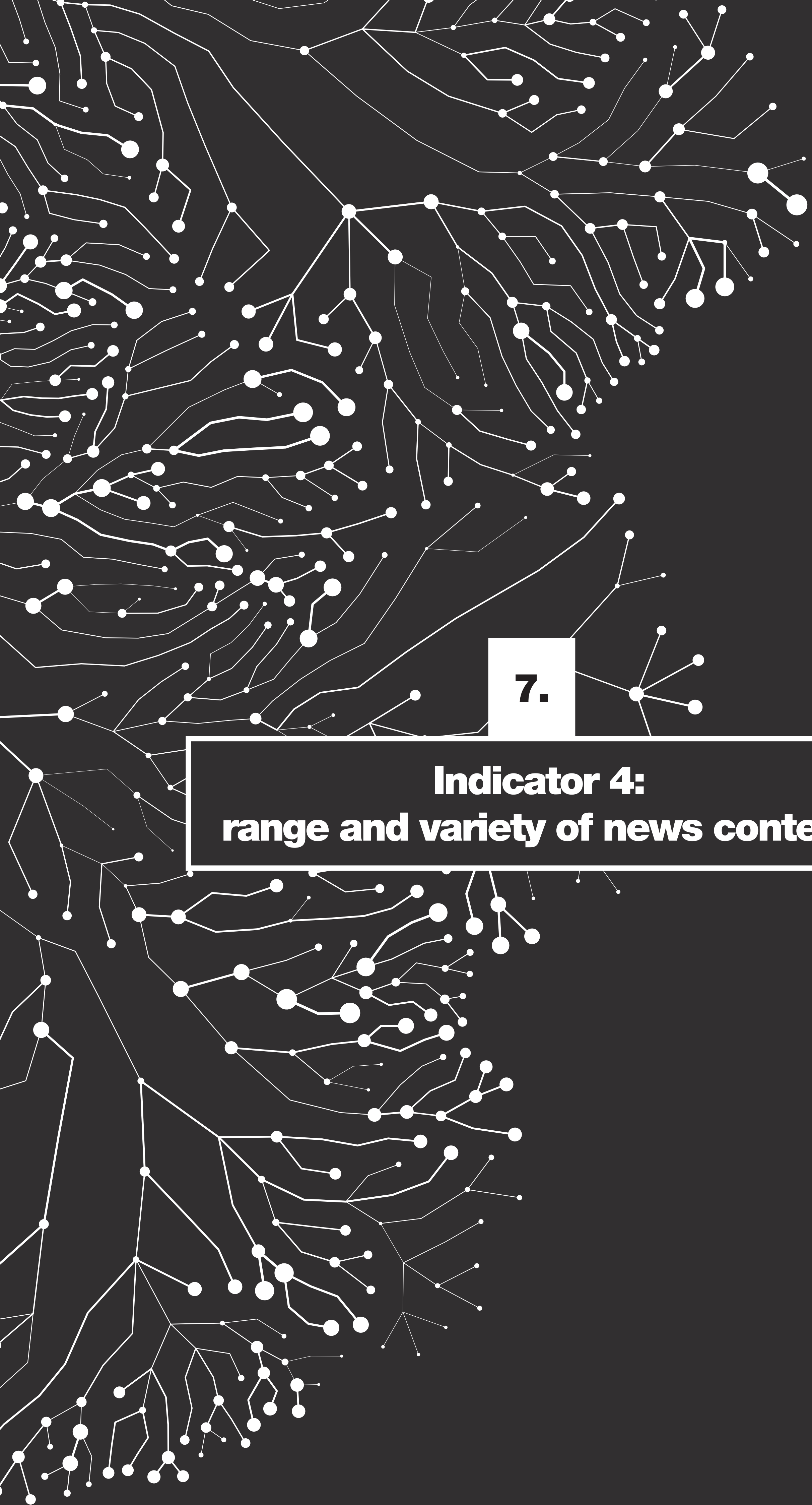
- the identification, assessment and inclusion of new outlets (that is, outlets that are not in existing indicator 3 datasets) under the Framework. We identified some outlets that may be eligible to be counted under indicator 3 during the implementation phase of the 2024 Framework, that will be assessed for inclusion in the data following the development of a suitably robust and transparent process. Where appropriate, we will leverage existing documented processes and guidelines used for assessing news businesses for inclusion on the ACMA register of eligible news businesses. We will also continue to consult with industry and other stakeholders on data collection mechanisms. More information will be published on the ACMA website in 2025, in advance of assessment processes and updates to indicator 3 data commencing
- the continuation of data validation to confirm all data is current (most importantly active/inactive status of outlets) and that all outlets, particularly those from datasets with broader parameters than the Framework, meet our criteria for inclusion. Our approach is discussed further and illustrated with a case study in Appendix D.

Improvements to geographic scale

As noted in this chapter and in Appendix F, currently available data does not support reliable reporting against more granular geographic scale metrics (that is, remoteness, scale of outlet coverage and LGAs covered). We will work to identify and, where possible, implement solutions to address or otherwise reduce these limitations and improve methodological consistency in this part of the Framework. We intend this to allow us to produce findings for these metrics in future reports.

Development of a searchable database

We will explore the feasibility of developing a database, comprising indicator 3 and indicator 1 (groups, owners and controllers) data. Making this data publicly available will provide greater transparency and enable stakeholders to contribute to its accuracy and completeness.



7.

Indicator 4: range and variety of news content

How much variety is present in professional news in Australia?

Key insights

- 80% of stories sampled contained public interest journalism (PIJ).
- Stories containing community-related content were the most prevalent (52% of all public interest journalism stories), followed by those with a focus on government (38%).
- Sampled stories contained relatively high levels of local content, and original (as opposed to syndicated) content.

➔ View the **support material** for indicator 4.

Introduction

To establish a comprehensive view of Australia's news media landscape, it is necessary to examine the diversity of news content as a separate measure from both news production and consumption. We cannot assume a linear relationship between levels of diversity in news media groups, outlets and journalists (source diversity) and the content they produce, nor a direct correlation between the availability of diverse content and levels of diversity in news consumption (exposure diversity).

Examining news content is key to understanding the relationship between news outlets and their intended audiences, including the extent to which news covers a diversity of topics, includes a diversity of viewpoints, contains original content, and meets the needs of local, regional, state/territory and national audiences.

Scope of the 2024 Framework

The 2024 Framework reflects a targeted approach to measuring content diversity, examining the range and variety of news articles sampled through a Public Interest Journalism Initiative (PIJI) project. This is in part due to the reality that counting and classifying news articles manually is time and labour-intensive. We also note that it involves a degree of subjectivity, which was highlighted in 2023 consultations on the Framework as a reason against a government agency conducting this type of work (for more information, see Appendix C).

In our December 2023 report on the Framework, we indicated that one of the metrics for indicator 4 would be the number of 'core and covered articles,[107] as a percentage of total news output. However, as indicator 4 currently relies on material published by PIJI, we have changed this language to refer to 'public interest journalism' and 'other'. Our December 2023 report also noted our intention to include 'degree of localism' as a metric for this indicator. While this is an area we will explore for future iterations of the Framework, for this initial report we have focused on the percentage of local content. More information on these refinements is provided at Appendix F.

107 As defined in the News Media and Digital Platforms Mandatory Bargaining Code. For more information, see chapter 3.

Data sources

Our initial assessment for indicator 4 is based on data from PIJI's Australian News Sampling Project (ANSP), which seeks to test 'the underlying assumption that newspapers and websites are providing public interest journalism for their local communities'.[108] This project represents one approach to content analysis that may be expanded on in future iterations of the Framework.

The 2024 Framework draws on the following data produced from PIJI's ANSP:

- the number and type of public interest journalism articles
- news categories (the topic of news)
- the percentage of local content
- the percentage of original (as opposed to syndicated) content.

For the purposes of the 2024 Framework report, we have drawn on data from the ANSP from September 2022 to August 2024. We have exercised discretion when deciding how much data to include in tables prepared for this chapter based on what was most illustrative and relevant for each metric. Please see Appendix F for details about the full dataset.

> ***Treatment of outlets that have been sampled multiple times***
>
> While most outlets are sampled by PIJI just once, some have been sampled up to 3 times, meaning stories published by these outlets are overrepresented in the analysis. In these instances, an average has been used to represent the data fairly. For example, ABC Adelaide had the most stories classified as public interest journalism (434) but was sampled in 3 separate case studies. Therefore, in this case, we record an average of 145 public interest journalism stories for ABC Adelaide.

Data limitations and gaps

Drawing exclusively on the ANSP, the 2024 Framework presents data on approximately 120 sampled news outlets (although no radio or television outlets) in approximately 110 (20%) of Australia's 556 local government areas (LGAs).[109] As a result, the outlets and content analysed may not be representative of broader market trends across all platforms, or in all news markets across Australia.

A limitation of the data presented is that it is captured via point-in-time analysis – that is, stories are collected for analysis during a defined period and therefore cannot be considered necessarily representative of the overall output for individual news outlets, or the sampled region. This is a challenge that many, if not most, approaches to content analysis face.

Given this relatively limited scope, the ACMA is considering ways to expand upon indicator 4 data and methodology in future iterations of the Framework. This may include consultation and engagement with third-party organisations with relevant expertise.

108 Public Interest Journalism Initiative, 'Case study, April 2024: Greater Adelaide, SA', *Australian News Sampling Project*, June 2024, accessed 24 October 2024, 11.

109 The term 'outlet' is used in this chapter as used by PIJI, defined in their online glossary as 'a news publisher'. This may, but will not always align with the definition of 'outlet' used elsewhere in the Framework and provided in Appendix B. In some instances, for example, outlet may be used in this chapter to refer to 2 or more platforms on which content is published by the same news publisher.

Analysis

Despite its relatively modest sample size, ANSP data provides a number of high-level insights regarding variety of news content. As the interactive data report to accompany indicator 4 is not available at the time of publication, data for this indicator is primarily presented in table format.

Number of public interest journalism stories, as a percentage of total news output

ANSP data demonstrates relatively high levels of public interest journalism across the regions and outlets sampled. Notwithstanding the limitations of point-in-time analysis outlined above, the data allows for a comparative analysis of levels of public interest journalism and news categories across sampled states and territories, case studies (see notes on comparability below) and news outlets. It shows that a clear majority of the stories were classified as containing public interest journalism.

From September 2022 to August 2024, PIJI sampled approximately 120 news outlets across approximately 110 Australian LGAs, leading to the analysis of 15,644 stories in total.

Table 16 presents a breakdown of the 12,043[110] stories that were classified as 'public interest journalism' or 'other'.[111]

Table 16: Stories classified as public interest journalism (PIJ) or other

Journalism type	Total stories	% of total
Public interest journalism	9,642	80
Other	2,401	20

Insights by state/territory

Stories sampled from South Australia represented the highest number (2,650) in PIJI's data within the specified timeframe. However, Tasmania and the NSW/Victoria border region had the highest percentage of stories containing public interest journalism (83%). No case studies specific to the ACT have been produced to date, and the ACT is therefore not included in this data. However, ABC Canberra and other outlets available in the ACT were included in the 2024 Goulburn and surrounds case study, albeit in relation to LGAs outside of the ACT.

Table 17 presents the number of stories sampled and percentage of public interest journalism from each state and territory, including the NSW/Victoria border regions.[112]

110 A further 3,601 stories were excluded from further analysis

111 Information regarding the classifications of 'public interest journalism' and 'other' is provided in Appendix F.

112 These border regions were the subject of 2 independent case studies and have therefore been separated from other NSW and Vic-related data. More information is provided in Appendix F.

Table 17: Stories sampled and percentage of public interest journalism by state/territory

State/territory	Total stories (PIJ & Other)	% PIJ	% Other	Total excluded
NSW	1,969	78	22	562
NSW/Vic	1,077	83	17	264
NT	447	64	36	70
Qld	1,379	81	19	316
SA	2,650	82	18	1,376
Tas	877	83	17	127
Vic	1,972	79	21	504
WA	1,672	81	19	382

Insights by case study

Publicly available ANSP data also allows for a comparative analysis by case study. Of the 27 case studies published, Eyre Peninsular, SA, contained the highest percentage (94%) of public interest journalism stories, followed by King Island Council, Tasmania (93%). Conversely, stories sampled in inner south Melbourne, Victoria (62%) and Darwin and surrounds, NT (64%) contained the lowest percentage of public interest journalism.

Table 18 presents all 27 case studies according to the percentage of stories classified as public interest journalism sampled in each.

Table 18: Case studies by percentage of stories classified as public interest journalism

Case study	Total stories (PIJ & Other)	% PIJ	% Other	Total excluded
Eyre Peninsula, SA	363	94	6	32
King Island Council, Tas	121	93	7	17
Goulburn and surrounds, NSW	282	92	8	36
Rural City of Horsham and West Wimmera Shire, Vic	539	91	9	73
East Gippsland and Wellington, Vic	466	91	9	78
Bourke Shire Council, NSW	255	89	11	51
North West Queensland, Qld	118	88	12	21
Coffs Harbour-Grafton Region, NSW	425	88	12	288
Southern Grampians Shire, Vic	130	88	12	21
Sunshine Coast Region, Qld	530	86	14	148
Bunbury and Surrounds, WA	419	85	15	62
Great Southern region, WA	377	85	15	140
Sunraysia region, NSW & Vic	613	84	16	155
North West, West Coast and Central Highlands, Tas	430	84	16	51
Rural City of Murray Bridge, SA	361	84	16	86
Bathurst Regional Council, NSW	122	84	16	78
Shire of Esperance, WA	240	83	17	44
Greater Adelaide, SA	1,345	82	18	1,169
Albury-Wodonga region, NSW & Vic	464	81	19	109
Maranoa Region, Qld	252	80	20	11
City of Burnie, Tas	326	78	22	59
City of Fremantle, WA	636	76	24	136
Cairns Region and surrounds, Qld	479	75	25	136
Adelaide Hills Council, SA	581	72	28	89
Inner Western Sydney, NSW	885	65	35	109
Darwin and surrounds, NT	447	64	36	70
Inner South Melbourne, Vic	837	62	38	332

Insights by case study remoteness[113]

Table 19 presents the percentage of all public interest journalism stories by case study remoteness class, indicating that, on average, stories sampled in regional and remote areas had a higher proportion of public interest journalism than those sampled in major cities.

Table 19: Percentage of stories classified as public interest journalism by remoteness class

Remoteness class	Total stories (PIJ & Other)	% PIJ	% Other	Total excluded
Major Cities of Australia	376	90	10	68
Inner Regional Australia	973	87	13	108
Outer Regional Australia	2,203	86	14	608
Remote Australia	3,677	82	18	762
Very Remote Australia	4,814	74	26	1

Insights by outlet

For 10 outlets, 100% of sampled stories were classified as public interest journalism. The outlet with the highest number of sampled stories (222) classified as public interest journalism was the Fleurieu Sun. This reflects 91% of all stories sampled from this outlet. Outlets that were shown to have 100% public interest journalism stories sampled (see Table 20) generally had a lower number of stories sampled.

Tables 20 and 21 present the 5 highest and lowest ranking outlets according to the percentage of stories classified as public interest journalism sampled from each.

Table 20: Highest ranking outlets by percentage of stories classified as public interest journalism

Outlet	Total stories (PIJ & Other)	% PIJ	% Other	Total excluded
NT Independent, NT	69	100	0	12
Robinvale Sentinel, NSW/Vic	46	100	0	19
King Island Courier, Tas	43	100	0	17
ABC Gippsland, Vic	41	100	0	3
The Rural Fringe, NSW	10	100	0	0

113 See Appendix F for methodology and remoteness class each case study is assigned to.

Table 21: Lowest ranking outlets by percentage of stories classified as public interest journalism

Outlet	Total stories (PIJ & Other)	% PIJ	% Other	Total excluded
Topics, WA	0	0	0	19
Tropic Now, Qld	8	0	100	3
NT News, NT	298	47	53	57
The Local Paper, Vic	108	48	52	88
Herald Sun, Vic	219	48	52	79
Daily Telegraph, NSW	304	49	51	43

News categories

As outlined above, PIJI assesses each sampled news story to determine whether it contains public interest journalism, or not. For stories classified as containing public interest journalism, PIJI then assigns up to 4 categories based on the content of the story. These are 'community', 'courts and crime', 'government', and 'public services' – each of which is identified in PIJI's definition of public interest journalism.[114] Stories classified as containing public interest journalism, but that do not to relate to any of these 4 categories (for example, a story focused exclusively on climate change), are not included in news category data. As each story can be assigned to up to 4 categories, percentages provided in the below tables do not add up to 100.

Table 22 presents the number of stories sampled by PIJI between September 2022 and August 2024 considered to cover each of the 4 categories.

Table 22: Number and percentage of stories classified as containing content relating to the 4 categories

Category	Total stories	% of stories
Community	5,204	54
Courts and crime	1,399	15
Government	3,643	38
Public services	2,126	22

114 For the purposes of the Australian News Sampling Project, PIJI notes that stories are 'defined as containing public interest journalism if they are, on balance, focused on an issue relating to government, crime and courts, community individuals, events and sport, or other public services such as health and education'. For more information, see Public Interest Journalism Initiative, 'Case study, April 2024: Greater Adelaide, SA', *Australian News Sampling Project*, June 2024, accessed 24 October 2024, 15.

Insights by state/territory

As noted in Table 18, Tasmania and the NSW/Victoria border regions jointly had the highest percentage of stories sampled containing public interest journalism (83%). Of these, in Tasmania, 50% of stories sampled were classified as containing community-related content, 16% as containing courts and crime-related content, 43% as containing government-related content and 24% as containing content related to public services. In NSW/Victoria border regions, 60% of stories sampled were classified as containing community-related content, 28% as containing courts and crime-related content, 34% as containing government-related content and 18% as containing content related to public services.

Table 23 presents the number of sampled stories that were classified as containing public interest journalism, then by category, from each state and territory.

Table 23: Number of stories classified as public interest journalism, by topic category and state/territory

State/ territory	Total PIJ stories	% Community	% Courts and crime	% Government	% Public services
NSW	1,540	49	16	38	22
NSW/Vic	895	60	28	34	18
NT	288	35	27	58	26
Qld	1,120	56	14	35	25
SA	2,163	53	15	36	20
Tas	726	50	16	43	24
Vic	1,549	61	11	34	23
WA	1,361	52	12	42	23

Insights by case study

The case study covering the Rural City of Horsham and West Wimmera Shire (Vic), reported the highest percentage of public interest journalism stories containing community-related content (77%). Interestingly, this case study reported the lowest percentage (3%) of stories containing courts and crime-related content, while inner western Sydney (NSW), reported the highest percentage (27%) of stories containing content in this category, alongside Darwin and surrounds, NT (27%). The case study covering Darwin and surrounds (NT) reported the highest percentage of stories (58%) containing government-related content, while the highest percentage of stories containing public services-related content were found in the Bourke Shire Council, NSW (37%).

Tables 24 to 27 present the highest and lowest ranking case studies according to their percentage of stories sampled that were classified as containing content related to each category.

Table 24: Highest and lowest ranking case studies by percentage of sampled stories classified 'community'

	Case study	Total number of PIJ stories	% community stories
Highest %	Rural City of Horsham and West Wimmera Shire, Vic	492	77
	Coffs Harbour-Grafton region, NSW	374	73
Lowest %	City of Fremantle, WA	486	39
	Darwin and surrounds, NT	288	35

Table 25: Highest and lowest ranking case studies by percentage of sampled stories classified 'courts and crime'

	Case study	Total number of PIJ stories	% courts and crimes stories
Highest %	Inner Western Sydney, NSW	578	27
	Darwin and surrounds, NT	288	27
Lowest %	Eyre Peninsula, SA	343	4
	Rural City of Horsham and West Wimmera Shire, Vic	492	3

Table 26: Highest and lowest ranking case studies by percentage of sampled stories classified 'government'

	Case study	Total number of PIJ stories	% government stories
Highest %	Darwin and surrounds, NT	288	58
	Inner Western Sydney, NSW	578	47
Lowest %	Coffs Harbour-Grafton region, NSW	374	21
	Rural City of Horsham and West Wimmera Shire, Vic	492	20

Table 27: Highest and lowest ranking case studies by percentage of sampled stories classified 'public services'

	Case study	Total number of PIJ stories	% public services stories
Highest %	Bourke Shire Council, NSW	227	37
	Bathurst Regional Council, NSW	102	33
Lowest %	Inner Western Sydney, NSW	578	15
	Great Southern Region, WA	319	13

Insights by outlet

While 100% of sampled stories from the Central West Village Voice*,* NSW were found to contain community-related content, no stories sampled from this outlet were found to contain government-related content. A total of 5 stories sampled from this outlet were classified as public interest journalism only. By contrast, 77% of stories sampled from the Fremantle Herald, WA, were found to contain government-related content, out of a total of 22 sampled stories from this outlet classified as public interest journalism.

Tables 28 to 31 present the highest and lowest ranking outlets according to the percentage of their sampled stories that were classified as containing content related to each category. Outlets from which no sampled stories were classified as public interest journalism have not been included in this data.

While 0% of sampled stories from 3 outlets were found to contain government-related content, we have included the 2 outlets with the highest number of sampled stories classified as public interest journalism, the Central West Village Voice, NSW and The Western Star, Queensland. Sampled stories from 3 outlets were found to contain no public services-related content from 10 or fewer public interest journalism stories.

Table 28: Highest and lowest ranking outlets by percentage of sampled stories classified 'community'

	Outlet	Total number of PIJ stories	% community stories
Highest %	Hinterland Times, Qld	12	100
	The Rural Fringe, NSW	10	100
Lowest %	ABC Riverland, NSW/Vic,	38	19
	ABC South West Victoria, Vic	31	16

Table 29: Highest and lowest ranking outlets by percentage of sampled stories classified 'courts and crime'

	Outlet	Total number of PIJ stories	% courts and crime stories
Highest %	The Mildura News, NSW/Vic	20	70
	Canterbury Bankstown Express, NSW	28	64
Lowest %	Coffs Coast New of the Area, NSW	137	0
	Nhill Free Press & Kaniva Times, Vic	116	0

Table 30: Highest and lowest ranking outlets by percentage of sampled stories classified 'government'

	Outlet	Total number of PIJ stories	% government stories
Highest %	Inner West Independent, NSW	5	100
	Fremantle Herald, WA	22	77
Lowest %	The Western Star, Qld	7	0
	Central West Village Voice, NSW	5	0

Table 31: Highest and lowest ranking outlets by percentage of sampled stories classified 'public services'

	Outlet	Total number of PIJ stories	% public services stories
Highest %	The Western Star, Qld	7	100
	ABC South West Victoria, Vic	31	61
Lowest %	The Rural Fringe, NSW	10	0
	Inner West Independent, NSW	5	0
	Central West Village Voice, NSW	5	0

Percentage of local content

The ANSP also analyses news output to determine whether stories published have a 'local' focus, regardless of whether the subject of the story was local to the area in which it was reported. To do this, PIJI assigned each sampled article to up to 3 of the 4 geographic scales. That is, whether a story concerns issues relevant to a local community, wider region, an entire state or territory, and/or national audience. Outlets have been excluded from this data where the total sample size provided was very small. It is important to note that because stories can be assigned up to 3 of these 4 geographic scales, some stories classified as containing 'local' content may also have a regional, state/territory or national focus (see Appendix F for further detail).

Insights by state/territory

Overall, stories sampled from Queensland had the highest percentage of local content (80%). By contrast, stories sampled from the NT had the lowest percentage of local content (32%).

Table 32 presents the percentage of local content, sampled from each state and territory.

Table 32: Percentage of local content sampled from each state and territory

State/Territory	% local content stories
NSW	64
NSW/Vic	64
NT	32
Qld	80
SA	66
Tas	62
Vic	63
WA	63

Insights by case study remoteness

Table 33 looks at the proportion of local content in sampled stories by case study remoteness. It reveals that stories sampled in 'major cities' were less likely to contain local content (52%), while stories sampled in 'inner regional' case studies were most likely to contain local content (79%).

Table 33: Percentage of local stories by case study remoteness

Remoteness class	% local content stories
Inner Regional Australia	79
Remote Australia	78
Outer Regional Australia	67
Very Remote Australia	66
Major Cities of Australia	54

Insights by case study

Stories sampled from the Maranoa Region, Queensland case study contained the highest percentage of local content (92%). By contrast, stories sampled from Darwin and surrounds, NT contained the lowest percentage of local content (32%).

Tables 34 and 35 present the 5 highest and lowest ranking case studies according to the percentage of local content contained in the stories sampled in each.

Table 34: Highest ranking case studies by percentage of sampled stories containing local content

Case study	% local content stories
Maranoa Region, Qld	92
Coffs Harbour-Grafton Region, NSW	91
Goulburn and surrounds, NSW	91
Sunshine Coast Region, Qld	89
East Gippsland and Wellington, Vic	85

Table 35: Lowest ranking case studies by percentage of sampled stories containing local content

Case study	% local content stories
Darwin and surrounds, NT	32
Inner South Melbourne, Vic	35
Inner Western Sydney, NSW	40
City of Fremantle, WA	47
City of Burnie, Tas	49

Insights by outlet

In total, there were 14 outlets from which 100% of sampled stories contained local content. Several of these are local, independently owned newspapers. By contrast, outlets that are part of larger networks were generally found to produce a lower percentage of stories containing local content, such as The Age, Vic (11%) and the Daily Telegraph, NSW (14%).

Table 36 presents the 20 highest ranking outlets according to the percentage of stories containing local content. A larger sample size has been presented here due to the high concentration of outlets from which close to 100% of sampled stories contained local content.

Table 36: Highest ranking outlets by percentage of sampled stories containing local content

Outlet	Total stories (PIJ & other)	% local content stories
Corowa Free Press, NSW/Vic	81	100
Sunshine Valley Gazette, Qld	46	100
The Western Herald, NSW	36	100
Wet Tropic Times, Qld	31	100
Coolum Advertiser, Qld	22	100
The Daily Examiner, NSW	21	100
Crookwell Gazette, NSW	13	100
The Coffs Coast Advocate, NSW	13	100
The Rural Fringe, NSW	10	100
The Port Lincoln News, SA	9	100
Tropic Now, Qld	8	100
The Western Star, Qld	7	100
Inner West Independent, NSW	5	100
Mary Valley Voice, Qld	5	100
Clarence Valley Independent, NSW	187	96
Newsport, Qld	80	96
Fremantle Herald, WA	23	96
Maranoa Today, Qld	88	95
Warrego Watchman, Qld	61	95
The Riverine Grazier, NSW/Vic	135	94

Table 37 presents the 5 lowest ranking outlets according to the percentage of stories containing local content.

Table 37: Lowest ranking outlets by percentage of stories containing local content

Outlet	Total stories (PIJ & other)	% local content stories
The Age, Vic	250	11
Daily Telegraph, NSW	304	13
NT News, NT	298	24
The West Australian, WA	274	24
Leader Inner South, Vic	74	26

Originality vs. syndication

As noted above, PIJI's case studies published after October 2022 (25 of 27 within the specified timeframe) also indicate whether stories analysed contain originally produced or syndicated content. Sources of syndication may be from another outlet from the same news brand or network (internal), from a wire service (such as the Australian Associated Press), creative commons material, or content from other news websites.

Insights by state/territory

Stories sampled from SA and WA were found to contain the highest percentage of original content (both 81%). By contrast, the lowest percentage of original content was found in stories sampled from the NT (49%).

Table 38 presents the percentage of sampled stories containing original and syndicated content from each state and territory. This table also includes the percentage of syndicated content stories, including a breakdown by syndication source.

Table 38: Percentage of original and syndicated stories (including syndication source) sampled from each state and territory

State/territory	Total	% original stories	% syndicated stories		
			Internal	Wire	Other
NSW	1,965	72	20	6	2
NSW/Vic	1,075	71	7	18	3
NT	446	49	35	9	7
Qld	1,119	76	22	1	1
SA	2,638	81	13	6	1
Tas	877	76	15	9	0
Vic	1,840	75	20	3	2
WA	1,648	81	9	8	3

Insights by case study remoteness

Table 39 shows the proportion of original and syndicated content by case study remoteness. It reveals that stories sampled in 'major cities' were least likely to contain original content (71%), while stories sampled in 'remote' case studies were most likely to contain original content (84%).

Table 39: Percentage of original and syndicated stories (including syndication source) sampled by case study remoteness

Remoteness class	Total	% original stories	% syndicated stories		
			Internal	Wire	Other
Remote Australia	709	84	12	5	0
Inner Regional Australia	2,070	81	10	8	0
Very Remote Australia	376	80	12	8	0
Outer Regional Australia	3,663	76	15	6	3
Major Cities of Australia	4,790	71	20	7	2

Insights by case study

Stories sampled in the Eyre Peninsula, SA case study contained the highest percentage of original content (97%). By contrast, stories sampled in Darwin and surrounds contained the lowest percentage of original content (49%).

Tables 40 and 41 present the 5 highest and lowest ranking case studies according to the percentage of original stories sampled. These tables also include the percentage of syndicated stories, including a breakdown of syndication source.

Table 40: Highest ranking case studies by percentage of original stories

Case study	Total	% original stories	% syndicated stories		
			Internal	Wire	Other
Eyre Peninsula, SA	361	97	3	0	0
Rural City of Horsham and West Wimmera Shire, Vic	537	95	5	0	0
Coffs Harbour-Grafton region, NSW	425	93	8	0	0
King Island, Tas	121	91	9	0	0
East Gippsland and Wellington, Vic	466	87	13	0	0

Table 41: Lowest ranking case studies by percentage of original stories

Case study	Total	% original stories	% syndicated stories		
			Internal	Wire	Other
Darwin and surrounds, NT	446	49	35	9	7
Inner South Melbourne, Vic	837	56	34	7	3
Inner Western Sydney, NSW	881	60	29	8	3
Adelaide Hills Council, SA	574	62	34	4	0
City of Burnie, Tas	326	64	11	24	1

Insights by outlet

In total, there were 39 outlets for which 100% of sampled stories contained original content. Of these, the Fleurieu Sun*, SA,* had the highest number (244) of stories sampled. By contrast, stories sampled from the Bunbury Mail, WA, the Crookwell Gazette, NSW, and the Leader Inner South, Vic, each contained no original stories from those sampled. The vast majority of content published by these outlets was internally syndicated, or in the case of the Bunbury Mail, syndicated from a wire service (78%).

Tables 42 and 43 present the highest and lowest ranking outlets according to the number of original stories sampled. While in total there were 39 outlets whose sampled stories were found to contain 100% original content, the below table presents the top 5 of these by total number of stories sampled. These tables also include the percentage of syndicated stories, including a breakdown of syndication source.

Table 42: Highest ranking outlets by percentage of original stories sampled

Case study	Total	% original stories	% syndicated stories		
			Internal	Wire	Other
Fleurieu Sun, SA	244	100	0	0	0
The Bunyip, SA	234	100	0	0	0
The Leader, SA	227	100	0	0	0
Eyre Peninsula Advocate, SA	216	100	0	0	0
The Weekly Advertiser, Vic	210	100	0	0	0

Table 43: Lowest ranking outlets by percentage of original stories sampled

Case study	Total	% original stories	% syndicated stories		
			Internal	Wire	Other
Bunbury Mail, WA	55	0	22	78	0
Crookwell Gazette, NSW	13	0	100	0	0
Leader Inner South, Vic	74	0	100	0	0
ABC Coffs Coast, NSW	13	15	85	0	0
The Albury-Wodonga News, NSW/Vic	28	18	82	0	0

Discussion

Overall, insights from PIJI's Australian News Sampling Project suggest that a high proportion of stories produced by professional news outlets in Australia contain public interest journalism.[115] This was broadly reflected, albeit to varying degrees, across Australian states and territories, as well as the LGAs and outlets sampled in the specified period. Stories containing community-related content were the most prevalent among the data, with stories containing courts and crime-related content the least prevalent. It is important to acknowledge that, while the 4 categories assessed are among the most common, they are clearly not intended to be exhaustive. For example, available data does not identify the percentage of stories that report on categories such as climate change or natural disasters.

Individual ANSP case study reports provide further insights into the types of content contained in each category. In their 2024 Greater Adelaide case study, PIJI notes that stories sampled and categorised as community were often found to be about local and community sport. One weekly edition, for example, published an additional 30-page feature titled 'Game On', highlighting the new winter season and clubs of local sports such as AFL, netball, hockey, soccer and rugby.[116] Community stories also covered ANZAC day events (which occurred during the month of sampling), community events (such as those showcasing local artists and authors, school events, local shows and festivals), the activities of local organisations (such as the Returned Services League and Probus groups), features on local personalities, local community health stories, vehicle crashes and coverage of local businesses.

Broadly speaking, the ANSP reveals a high level of original content in the stories sampled. Levels of syndication were typically higher from larger news brands and networks (the ABC, for example) with local, independent newsrooms more likely to produce higher levels of original content.[117] The most common form of syndication was internal syndication, indicating that outlets were more likely to syndicate content from within their news brand and/or network than an external source, such as a news wire service.

Similar trends appeared with local content, where local, independent newsrooms were more likely to produce stories containing local content than larger networks or brands. Conversely, larger news brands and networks were more likely to produce content considered relevant to an entire state or territory, or national issues. Discussion of original and local content in the ANSP 2024 Greater Adelaide case study, for example, explores these issues in context.

Finally, assigning each case study to a remoteness class revealed that stories sampled in case studies based in major cities were less likely to contain public interest journalism, a local focus and original content compared to those sampled in regional and remote areas. While 'major cities' case studies included a larger proportion of stories sampled from major news outlets (for example, metropolitan daily newspapers), smaller independent outlets feature among those with the highest proportion of public interest journalism, local focus and original content.

115 Some outlet(s) sampled under the ANSP are 'community scale' news producer(s) and therefore are not counted as 'professional' under indicator 3. See chapter 6 for more information.

116 Public Interest Journalism Initiative, 'Case study, April 2024: Greater Adelaide, SA', *Australian News Sampling Project*, June 2024, accessed 24 October 2024, 16.

117 Due to the small sample size included this report, these trends may not be apparent in the tables presented. Data supporting this indicator can be explored in more detail via PIJI's ANSP reports and the ACMA's forthcoming interactive data report for this indicator.

Again, the sample size presented in the 2024 Framework limits the applicability of insights to the news market at large. While the labour-intensive nature of content analysis suggests that automated approaches may be able to produce more representative findings, risks associated with algorithmic bias, inaccuracy and other unintended errors mean it is appropriate to adopt a cautious approach to the use of AI in content analysis.[118] Researchers are, however, exploring ways to integrate machine learning into content analysis in ways that might offer significant opportunities to expand upon this work in future. One example of this is the Media Pluralism Classifier Tool, discussed in the following case study.

118 See, for example, Australian Human Rights Commission, *Technical paper: addressing algorithmic bias, 2020,* accessed 10 September 2024; Centre for Media Transition, University of Technology Sydney, Generative AI and journalism, 2023, accessed 24 June 2024.

Case study 2: Media Pluralism Classifier Tool

Image source: PicMedia - stock.adobe.com

Background

Against the backdrop of a federal election, the Media Pluralism Research Project Classifier Tool sought to explore and advance computational ways of evaluating media pluralism in multi-platform, complex news ecosystems.

The classifier tool was developed as part of the Media Pluralism and Online News initiative – a 2019 joint project between the University of Technology Sydney's Centre for Media Transition (CMT) and media and communications researchers at the University of Sydney. The tool explores the relationship between online news production and consumption, and the promotion of media pluralism.

Methodology

The tool's main dataset was articles published on the homepages of the top 20 Australian online news outlets in 2019.[119] This period coincided with the 2019 Australian Federal election, which was held on 18 May 2019.

Using 4 cross sections of data (6-hourly, daily, weekly and monthly), the tool classified articles into public and non-public affairs,[120] and provided a proportion of the total number considered public affairs for each publication/outlet. Project investigators and the University of Sydney's Informatics Hub built a basic text classifier and drew on learnings from earlier models to refine its classification approach.[121]

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119 Roy Morgan, 'It's official: Most Australians now visit news or newspaper websites' [media release]', Roy Morgan website, 24 May 2018, accessed 21 October 2024.

120 Public affairs reporting was defined as conveying timely, factual and opinion-based information about events and issues in government and politics, business and administration (including education, health, science and other matters that have broad social significance). By contrast, non-public affairs reporting was defined as reporting timely, factual and opinion-based information about topics of entertainment, art and culture, leisure and lifestyle (including sport, well-being, fashion and music). The ACMA understands the categories of public affairs and non-public affairs as being substantially aligned with the categories of core and covered news, respectively. In contrast to the definition of public interest journalism deployed by PIJI, however, the category of public-affairs deployed by the classifier tool, like the ACMA's definition of core news, does not include a 'primary purpose' component (requirement for outlets to have a primary purpose of producing public interest journalism to meet the definition of public interest journalism). For more information, see chapter 3.

121 Primarily, the tool was developed for the Sharing News Online Project, the output of an Australian Research Council linkage grant. For more information, see T Dwyer and F Martin, 'Sharing news online: Social media news analytics and their implications for media pluralism policies', Digital Journalism, 2017, 5(8), 1080 1100, doi: https://doi.org/10.1080/21670811.2017.1338527.

The tool further categorised sampled articles by topic, including 'crime, law and justice' 'health', 'sports' and 'history, politics and religion'. Findings from the project were presented via the Media Pluralism Project Dashboard, where analysts could select a particular aspect of the media market and compare content outputs over the specified timeframe. The dashboard also allowed analysts to group outlets by network (outlets with shared owners and/or controllers).

Findings

While the project dashboard is no longer publicly available online, findings from the project are discussed in Derek Wilding and Tim Dwyer's 2023 chapter of Intellect's 2023 publication, *Media Pluralism and Online News,* 'New Directions in Media Pluralism and Diversity Interventions'. Here, the authors draw on the tool's findings to undertake a comparative analysis of the online news content of 2 of Australia's largest media networks, News Corp Australia and Nine Entertainment. Importantly, the findings allowed project investigators to compare the raw number of articles published by an outlet against their proportion of public affairs articles. For example, certain outlets in the larger dataset that produced a high volume of public affairs articles were found to have produced a relatively small proportion of public affairs articles in comparison to their wider output.

Conclusion

While these findings are now 6 years old (and rely on static data), the tool provides a valuable insight into the potential for automated analysis of media diversity.

In their submission to the ACMA's 2023 consultation on the Framework, project investigators noted that further development could enable the classifier tool to move beyond reliance on static data to the ingestion and analysis of 'live' content. They also noted that further machine learning could also support the evolution of the tool's content classification from categorisation by topic to assessing a range of viewpoints, and could support the establishment of a baseline measure of media pluralism and monitor change over time.

Next steps

In 2025, we intend to publish an interactive data report for indicator 4 on the ACMA website.

As discussed in this chapter, PIJI's approach to measuring content diversity under the ANSP is one of many. Consideration of other forms of content diversity, including standpoint diversity, viewpoint diversity and a richer study of localism, among other areas, have an important role to play in developing a holistic understanding of levels of media diversity in Australia. The ACMA will explore the expansion of our engagement with, and reporting on, content diversity as part of further development of the Framework. This will include examination of issues outlined below.

Program-type diversity

As noted by Napoli, program-type (or format) diversity 'refers to the category designations given to radio formats, cable channel formats, and individual television programs' and might include, for example, the various types of television programs available to a viewer at a particular time of programming.[122] Incorporating program-type diversity into the Framework may help to illuminate the impact of policy or market changes on the variety of program types available, as well as overall consumer satisfaction (based on the amount of preferred program types available to consumers at any given time) with the offerings available within a particular market or time of programming.

Demographic diversity

Demographic diversity refers to the extent to which diversity in culture, ethnicity, gender, age, sexuality, disability, religion and other forms of diversity are represented in news and media. Of particular importance is the extent to which, and how, the experiences of people and communities who are often marginalised and under-represented in society are represented. Demographic diversity in news content intersects with the issue of demographic diversity in the journalism workforce and has been explored in studies noted in chapter 5. This includes the *Who Gets to Tell Australian Stories?* series and *Closing the Gap on First Nations peoples representation in the media*, examining the representation of First Nations peoples in media. Other relevant studies include the *Women in Media Gender Scorecard*, exploring the extent to which women are represented in media, featured in the news and represented as experts in their fields. Among other things, these studies highlight the complex factors that contribute to the under-representation of particular communities in news and media, including media ownership, production and 'the representation, training and understanding of staff working in media organisations.'[123] This points to a potential link between indicator 4 (content diversity) and indicators 1, 2 and 3 (source diversity) that could be further explored in future iterations of the Framework.

122 PM Napoli, 'Deconstructing the Diversity Principle', *Journal of Communication,* 1999, 49(4): 7-34, doi: https://academic.oup.com/joc/article-abstract/49/4/7/4108153?redirectedFrom=fulltext, 18.

123 Lowitja Institute and First Nations Media Australia, *Closing the Gap and First Nations peoples representation in the media*, May 2022, accessed 2 August 2024, 10.

Viewpoint and standpoint diversity

Encompassing the diversity of views and perspectives represented in news and media, viewpoint and standpoint diversity were frequently raised in submissions to the ACMA's 2023 consultation on the Framework. Studies of viewpoint diversity seek to understand the variety of perspectives, sources, opinions or ideas present within a particular news/media offering, outlet, or during a particular period of programming. They may also track the variety of viewpoints present in media discourse surrounding a particular topic, or the prominence of certain viewpoints, commentators or publications in discussions of a particular topic over time.[124]

Standpoint theory holds that understanding and interpretation of the world are social, contextual and subjective.[125] This means that experiencing the world as a person of a specific gender, cultural identity, racialised group, age, socio-economic status or other lived experience impacts a person's knowledge and understanding. One example of the use of standpoint theory in media studies is Thomas, Norman and Jakubowicz's (eds.) work of the representation of Indigenous voices and perspectives in mainstream Australian media and the impact of this on First Nations people's political aspirations. In this case, links emerge between indicator 4 and indicator 6 (trust and impact), offering another area for potential expansion in future.

Localism and originality

The degree of localism within a news market was also a prominent issue in submissions to the ACMA's 2023 consultation. Initially considered one of 2 core tenets of the ACMA's news measurement framework, localism represents a longstanding regulatory objective of Australian media regulation as set out by the *Broadcasting Services Act 1992* (BSA). The Framework's initial focus on localism was scaled back following feedback received through 2023 consultations, which highlighted various challenges including the range of views on how 'local' could be conceptualised (more information provided in Appendix C). However, we will continue to explore opportunities to address this appropriately in future iterations of the Framework.

While indicator 4 currently includes ANSP data on the percentage of local content produced by various news outlets, whether a story is local in nature reflects only one aspect of localism. PIJI's reporting distinguishes between the percentage of stories contain that local content (general) and those containing content that is local to the LGA in which it is consumed (localism), for example. Studies of localism can also include quality assessments to determine the extent to which news content might meet the needs of the particular community in which it is consumed, such as information regarding politics and civic life, community events, sports, health roads and car crashes.[126] Information on our decision to only report on the percentage of local content in the 2024 Framework is provided in Appendix F.

A key focus of localism studies globally has been mapping news deserts or gaps where news, media and/or public interest journalism is seen to be lacking or in decline.[127] This is evident in some of the international approaches highlighted in chapter 2 of this report as well as in Australian examples such as Dickson and Simons' *Availability of local news and information* report. Hess has published on the challenges facing local news and its continued centrality to public safety, wellbeing, social connection and community, as well as (alongside Marco Magasic and Julie Freeman) the social, civic and political impact of local newsroom closures. The ACMA will consider further exploration of localism in future iterations of the Framework.

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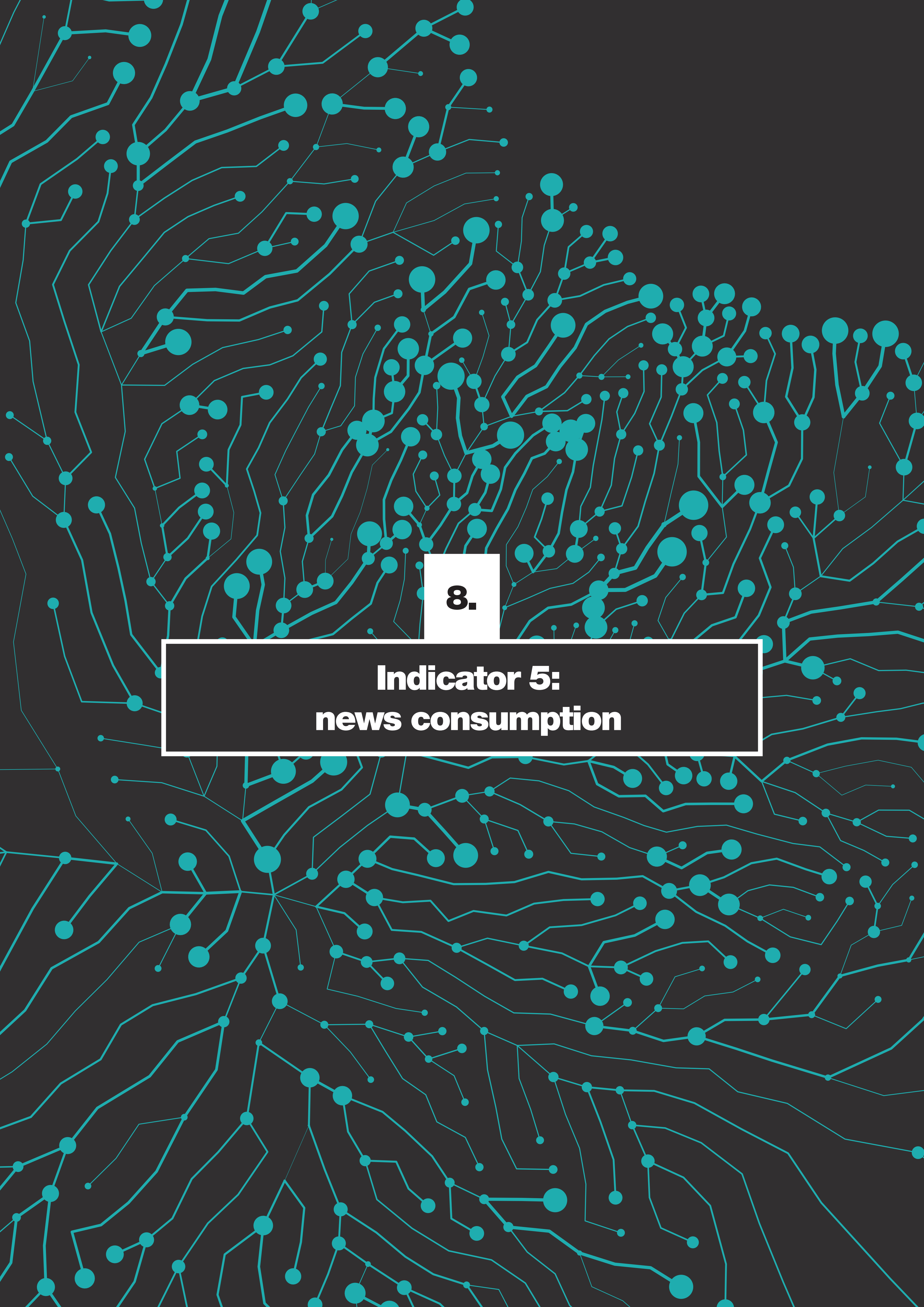
124 Pulsar and iSentia, *Sustainability: Mapping the media & public conversations*, 2024, accessed 6 August 2024.

125 A Thomas, A Jakubowicz and H Norman, *Does the media fail Aboriginal political aspirations? 45 years of news media reporting of key political moments*, Aboriginal Studies Press, 2020, 27.

126 A Khanom, D Kiesow, M Zdun and CR Shyu, 'The news crawler: A big data approach to local information ecosystems', *Media and Communication,* 2023, 11(3) August 2023, doi: https://doi.org/10.17645/mac.v11i3.6789.

127 M Magasic, K Hess and J Freeman, 'Examining the Social, Civic, and Political Impact of Local Newspaper Closure in Outback Australia'*, Media Communication,* 2023, 11(3): 404-413, doi: https://doi.org/10.17645/mac.v11i3.6697.



8.

Indicator 5: news consumption

What are the most consumed sources of news in Australia?

Key insights

- The proportion of Australian adults who consume news is decreasing overall.
- Free-to-air TV and online news websites and apps continue to be our most popular platforms to access news (for the third year in a row), while consumption of news via social media and communication websites and apps continues to be popular among younger Australians (aged 18 to 34).
- ABC news outlets are the most likely outlets to be accessed across most platforms, including free-to-air TV and catch-up and streaming services, radio (AM/FM/DAB+ and via the internet), podcasts, and online news websites and apps.

→ View the **interactive data report** for indicator 5.

Introduction

Indicator 5 seeks to measure exposure diversity in the Australian news landscape by exploring how Australians consume news media, including professional, non-professional and international sources. We can begin to do this by looking at patterns of consumption, including how and where access occurs.

Research shows that the ways in which Australians consume news are constantly evolving. Access occurs across a range of platforms, brands and outlets, with variations observable amongst demographic groupings. Whilst news consumption has declined overall, diversity can still be measured by assessing the spread and range of access, for example, at a population level, by looking at the range of news sources consumed by all Australians, and at a demographic level, by looking at looking at the range of news sources consumed by certain groups.

Scope of the 2024 Framework

The 2024 Framework measures consumption by analysing results from the ACMA annual consumer survey. This analysis captures levels of diversity in terms of both the spread and range of Australians' access to news media. The indicator 5 taxonomy (see figures 8 and 9 below), illustrates the structure of our analysis, focusing on exposure at both a platform and an outlet level.

Data sources

Data for indicator 5 has been drawn primarily from the ACMA annual consumer survey between 2022 and 2024, which is conducted to support the ACMA's regulatory priorities. The data is collected online via the Social Research Centre's national probability-based online panel, Life in Australia™.

The 2024 Framework draws primarily on data collected from the survey's news module. For more information on the contents of the news module, please see Appendix F.

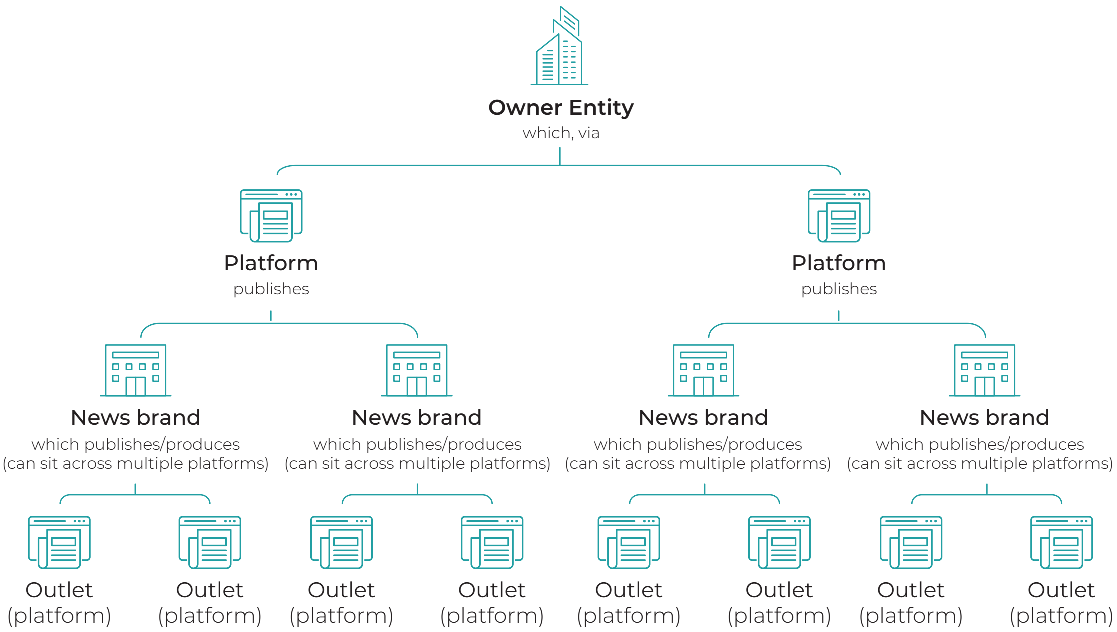
More information on the methodology for this research, including the 2024 questionnaire is available on the ACMA website.

Indicator 5 taxonomy

Figures 8 and 9 depict the taxonomy of concepts used to frame insights for indicator 5. Please note, while the ACMA annual consumer survey uses the term ‘source’ to describe a variety of news providers and distribution channels, for the purposes of reporting against indicator 5, we have used the term ‘news outlet’ to describe a specific provider of news content (for example, ABC iview, ABC News Radio), as distinct from ‘platform’, which is used to denote a distribution channel (for example, free-to-air TV, Radio (AM/FM/DAB+)). This allows for a more meaningful and accessible analysis. The glossary at Appendix B provides further detail.

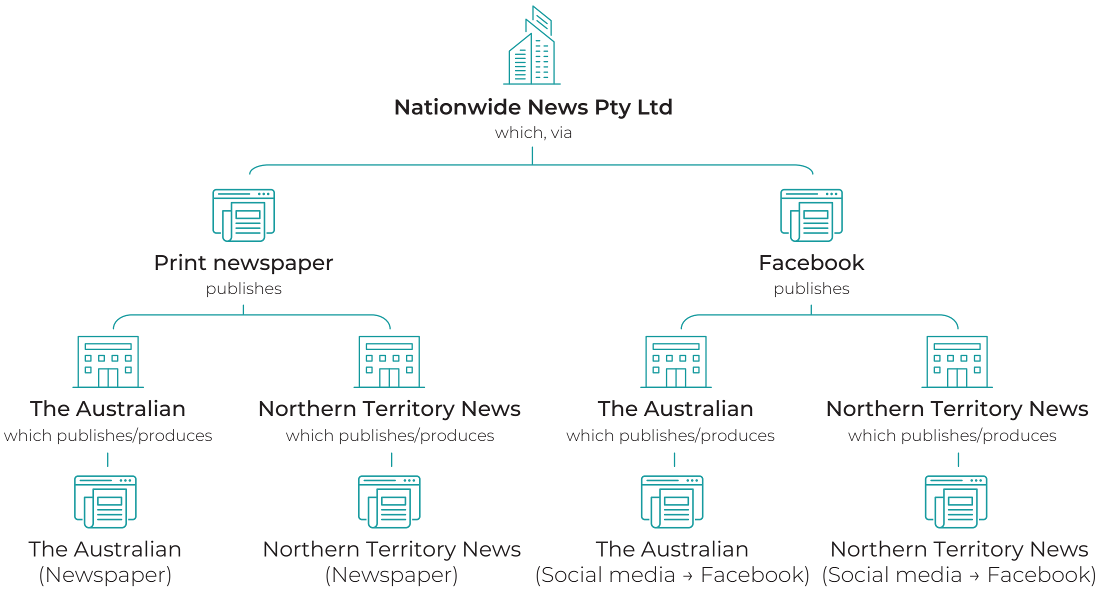
Figure 8 shows the structure of defined terms, while Figure 9 applies these terms to an example arbitrarily selected from the ACMA annual consumer survey data.

Figure 8: Indicator 5 taxonomy (defined terms)[128]



128 See Appendix B: glossary.

Figure 9: Indicator 5 taxonomy (with example) [129,130]



Data limitations and gaps

National population perspective

Results for news consumption in this report are intended to provide a view of consumer behaviour at a national level. For news outlets that service a smaller demographic (for example, regional newspapers), the consumption data presented in this report does not provide a realistic view of relative consumption patterns, since access has been measured against a national base for the purpose of statistical analysis, rather than the true population base for an outlet, which may be much smaller (for example, residents of Far North Queensland).

Use of social media for accessing news

Acknowledging the complex and non-linear ways in which content is consumed via social media, we note that the variables used to assess the use of social media for accessing news in the 2024 ACMA annual consumer survey could benefit from expansion. For example, current questions do not garner insights into the use of 'shares' and 'likes' on social media or the impact of social networks on news consumption.

129 For online intermediaries (described in detail in this chapter), such as social media and communication websites/apps, search engines, and news aggregators, consumers' experience is further mediated by platform owners not associated with news production, such as Meta, or Alphabet (Google).

130 News brands and outlets listed do not represent an exhaustive list of those published by the identified owner entity or news brand. News brands may also publish across a greater number of platforms than those represented in the diagram.

Limited data on outlets for online intermediaries

Due to differences in how digital platforms (that is, social media, search engines and news aggregators, or 'online intermediaries' collectively) provide access to news, these platforms have been coded in the ACMA annual consumer survey with sub-platforms/services (for example, Facebook, Google, Apple News) instead of outlets, while other platforms, such as free-to-air TV, have been coded with outlets (for example, Seven Network).

As a result, the 'consumption by outlet' analysis relies on data collected in the ACMA annual consumer survey on access to professional news brands/outlets (referred to as 'outlets' in the analysis) (for example, the Guardian, the ABC). This question draws from a single response option list for all 3 online intermediaries, somewhat limiting results at the outlet level (for example, data is not available for the ABC News Instagram account).

Analysis

Access is understood and used in this analysis as a synonym for 'news consumption', reflecting the design of the ACMA annual consumer survey, which measures access to news in the past 7 days. Expanding on this, rates of access (by proportion of Australian adults) are understood and used in this analysis as a measure of 'popularity'.

Declining news access

Fewer Australians accessed news in 2024 compared to the previous year. In June 2024, 91% of Australian adults accessed news in the previous 7 days – a decline from 95% in 2023. Of those Australians who accessed news, they also used fewer platforms – 2.9, down from 3.1 in 2023.

The impact of these declines can be seen across all formats surveyed, with news access declining for all online platforms, for free-to-air TV and for podcasts and print newspapers.

During this period, more Australian adults did not access news at all – the proportion increasing to 9% from 5% in 2023. This is particularly pronounced for young Australians, with 18 to 34-year-olds more likely than any other age group to have not accessed any news in the previous 7 days (15%). That said, those aged 45 and older were also more likely to not access news in 2024 compared to the year before (5% up from 2% in 2023). Women were also more likely than men to not access news (10%), which is reflected across most platforms and outlets discussed in this chapter.

Consumption by platform

The most popular platforms for Australian adults to access news in 2024 were free-to-air TV (50%) and online news websites and apps (news websites/apps) (46%). Most also considered free-to-air TV or news websites/apps to be their *main* source of news (27% and 21% respectively).

Despite being the most popular platform for accessing news, fewer Australians accessed free-to-air TV for news over the past 2 years (50% in 2024, down from 59% in 2022) and fewer Australians accessed free-to-air TV as a *main* source of news over the past 2 years (28% in 2024, down from 39% in 2022).

The use of free-to-air TV for accessing news in 2024 was more pronounced for certain demographic groups, with older Australians (75+) more likely to access news via free-to-air TV (88%) than any other age group, and more likely than any other age group to use free-to-air TV as their main source of news (59%). Males were also more likely to access news via free-to-air TV than females (52% compared to 48%).

News websites/apps have also declined in popularity, with fewer Australians using this platform to access news from 2022 to 2024 (46% in 2024, down from 58% in 2022). News websites/apps had broader appeal than free-to-air TV but were more popular with males than females (51% compared to 41%), with males also more likely (23%) than females (18%) to use news websites/apps as their main source of news.

For audio formats, fewer Australians listened to podcasts for news in 2024 (7% in 2024, down from 10% in 2023), while 2 in 5 of us (39%) listened to radio (AM/FM/DAB+) and a smaller group listened to radio via the internet or app (excluding podcasts) (radio via the internet) (6%).[131] Overall, in 2024, males were more likely than females to access any audio platform for news (50% compared to 40%). The role and popularity of podcasts is explored further in the case study below.

131 The following codes were added to the ACMA annual consumer survey in 2024, therefore comparison data from last year is not available: radio (AM/FM/DAB+); and radio via the internet.

Case study 3: Evolution of news podcasts[132]

Background

For at least a decade, podcast consumption has been increasing around the world.[133] This trend is evident in Australia for podcasts generally and, among certain consumers, for news podcasts specifically. Closer examination of podcast consumption trends also reveals insights into the changing nature of how listeners think of, and access news.

Podcast consumption

The News & Media Research Centre's Digital News Report shows that 40% of Australians listened to podcasts in 2024, up from 33% in 2022. The report found that news podcasts are one of the most popular podcast genres, with 14% of Australians surveyed having listened to a news podcast in the previous month. Other popular podcast genres included podcasts about contemporary life (16%), lifestyle (17%) and specialist subjects such as science and technology (20%), which were more widely consumed than news podcasts.

The Digital News Report also found that the percentage of heavy news consumers – those who consume news more than once a day – listening to podcasts has increased. In 2024, 61% of those considered heavy news consumers listened to podcasts (up from 57% in 2023), and 77% listened to podcasts specifically about news, politics and international events (up from 67% in 2023).

132 This case study draws on external industry and academic research as well as internal work produced by the ACMA's Regulatory Research and Markets team.
133 Y Sang, JY Lee and S Park, 'The production and consumption of news podcasts', *Media International Australia*, 2023, (187)1, doi: https://doi.org/10.1177/1329878X23115942; Y Sang, JY Lee and S Park, 'Podcast trends and issues in Australia and beyond: global perspectives' 22 October 2020, accessed 25 September 2024.

Key insights

Despite relatively low consumption of news podcasts (compared to other news sources and other podcast genres), many news publishers are investing in podcasts and reaping the associated benefits.[134] These include the potential for podcasts to diversify the content of a news operation, increase creativity and flexibility in newsrooms, deepen the coverage of complex and dynamic issues, and diversify revenue.[135] The 2024 Digital News Report also highlighted the greater proportion of podcast listeners (33%) who pay for news than consumers of news via other formats. The proportion of podcast listeners who pay for news was, however, down 11% from 2023.

Certain podcast genres are blurring the boundaries of what is traditionally considered journalism and news. An example of this is 'true crime' podcasts, which often sit 'at the nexus of journalism, non-fiction, crime fiction and testimony narratives'[136] and are sometimes owned by newspapers or other news businesses. This again corresponds with international research revealing a desire for engaging and entertaining opinion-based content as well as a maintained interest in impartial, straightforward, factual reporting.

Consumer research notes the tendency of news consumers to listen to podcasts to 'get inspired and informed while commuting or working'. When asked why they listen to podcasts, 55% of respondents agreed with the statement, 'Podcasts provide a more entertaining way of getting the news than other forms of media'.[137] This suggests the integration of news consumption into other parts of life and a preference for the entertaining, convenient and accessible nature of podcasts both generally and in relation to news podcasts specifically.

Podcasts as professional sources of news

The emergence of podcasts as a source of news for certain Australian consumer groups is evident in the Digital News Report, however this trend is not visible in reporting on news outlets against indicator 3 (professional news outlets). This reflects the under-representation of news podcasts in existing datasets and that many podcasts would be unlikely to meet the definition of 'professional news' under the 2024 Framework. This is largely because there is not currently a dedicated industry standard or code of practice for podcasts, meaning that unless a podcast producer develops and adheres to a comparable internal standard, it will not meet the Framework's definition of 'professional news' (as outlined in chapter 3).

As research on the use of podcasts as a source of news continues to emerge, we will review the scope of the professional news parameter and the extent to which it might be expanded to capture podcasts and other emerging formats.

Conclusion

While the consumption of news podcasts remains relatively low compared to other genres of podcasts and other news formats, it has increased among some consumer groups and provides an alternate means for news consumption that meets certain consumer needs, such as a desire for engaging and entertaining news content. These trends may explain the increasing investment in podcasts made by news producers, and areas into which news consumption trends may evolve in the future.

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134 See, for example, C Robertson and N Newman, 'Reuters Institute Digital News Report 2022', 2022, accessed 28 October 2024; MPM Pérez-Alaejos, R Terol-Bolinches and A Barrios-Rubio, 'Podcast production and marketing strategies on the main platforms in Europe, North America and Latin America. Situation and Perspectives', *International Journal of Information and Communication,* 2022, 31(5), doi: https://doi.org/10.3145/epi.2022.sep.22.

135 P Molina, 'Five key ways in which podcasting may benefit your news operation' 29 November 2022, accessed 28 October 2024.

136 L Vitis, 'My favourite genre is missing people: Exploring how listeners experience true crime podcasts in Australia', *International Journal for Crime, Justice and Social Democracy*, 2023, (12)1: 97-110, doi: 10.5204/ijcjsd.2362.

137 Y Sang, JY Lee and S Park, 'Podcast trends and issues in Australia and beyond: global perspectives' 22 October 2020, accessed 25 September 2024, 13.

A similar pattern is observable for print formats, with fewer Australians using traditional print newspapers to access news over the past 2 years (15% in 2024, down from 23% in 2022). From a demographic perspective, older Australians (75+) were more likely to read print newspapers (43%) than any other age group, and males more likely to read print newspapers than females (17% compared to 13%).

When comparing formats, online platforms (which include news websites/apps and online intermediaries – social media and communication websites and apps, online search engines (search engines) and online news aggregators (news aggregators)), were the most popular overall, with 73% of Australians using an online platform to access news, compared to 54% who watched news via television formats. While free-to-air TV was the most popular single platform for accessing news, television overall (which includes free-to-air TV, free-to-air catch-up and streaming services (streaming services), and subscription or Pay TV services (subscription TV)) was not the most popular format (discussed further below).

The influence of online platforms on news consumption

The influence of online platforms on news consumption in contemporary Australia is significant. As noted above, 73% of Australians used online platforms to access news in a given week in June 2024. This is comparable to findings reported by the Digital News Report, which found that half of Australians used social media and communication websites/apps as a source of news (49%) and just over half used other online sources (53%).

Online intermediaries

To understand the impact of online platforms on exposure diversity, the Media plurality and online news discussion document, released by the UK Office of Communications (Ofcom) in 2022, suggests assessment via 2 lenses: an analysis of social media and communication websites/apps as a stand-alone category, and a separate analysis of 'online intermediaries', which Ofcom defines as:

> services which increasingly operate in the space between news creators, who write and produce news content and make it generally available, and the public who read, watch and listen to this material.

Online intermediaries include social media and communiaction websites/apps, search engines and news aggregators, but not news websites/apps. This distinction can be understood in terms of influence exercised at the platform, ownership and control levels. While a news website is designed and curated by a dedicated news brand, such as Sky News or SBS, online intermediaries are generally controlled by entities that are not primarily invested in news production, such as Meta and Google. As a result, news content delivered on these platforms can be subject to curation mechanisms that impact exposure diversity such as algorithms, prominence models, recommender systems, down-ranking and even censorship. News content published on more 'traditional' platforms, including news websites/apps, is typically not subject to these influences unless in the interest of journalistic standards, or based on the priorities of news editors/publishers.

Online intermediaries provide consumers access to a range of news outlets at once. However, the professional outlets most accessed by Australians via online intermediaries in 2024 are the same as those most accessed via news websites/apps (with slight variations to the ranking of the top 5) and generally comparable to those accessed via free-to-air TV (with the exception of SBS and Network 10 and noting that the Guardian does not offer a free-to-air TV news outlet). See Table 44 below for a comparison of this data.

This suggests that despite having the ability to curate a more diverse newsfeed, consumers tend to access the same outlets via online intermediaries as they do via other popular platforms. That said, when accessing news via social media and communication websites/apps, consumers are also exposed to a range of non-professional news content, which is not captured in this analysis.

Table 44: Professional news outlets accessed by online intermediaries, news websites/apps and Free-to-air TV

Rank by access	Accessed via online intermediaries	News websites/apps	Free-to-air TV
1	ABC news (53%)	ABC News (54%)	ABC (56%)
2	News.com.au (37%)	News.com.au (37%)	Seven Network (51%)
3	9News (35%)	Guardian Australia (28%)	Nine Network (47%)
4	7NEWS (33%)	9News (20%)	SBS (25%)
5	Guardian Australia (27%)	7NEWS (15%)	Network 10 (24%)

Base: Australians aged 18 and over who accessed news (QN1) (n=3,530), or via online news aggregator or online search engine (QN1), or on social media from professionally produced news media (QN3): (n=1,645), Data filtered to those who know the original news source (QN8): (n=1,298).
Source: ACMA annual consumer survey, June 2024, QN1, QN8. See Measurement approach for more details.

Social media

Social media and communication websites/apps are the most unique of the online intermediaries because they are not designed to carry news as their primary function, and they are populated with content published by both professional news outlets and various non-professional sources. Nonetheless, social media and communication websites/apps were popular with Australians for accessing news in 2024, especially those aged 18 to 34, who were more likely to access news via social media and communication websites/apps (60%) than any other age group. Females were also more likely to access news via social media and communication websites/apps than males (44% compared to 39%). Facebook (63%), Instagram (31%), and YouTube (24%) were the most popular of these platforms for accessing news, although access via Facebook and YouTube declined from the previous year (63%, down from 70% in 2023, and 24% down from 37% in 2023, respectively).

Older Australians (aged 45+) were more likely than younger Australians (aged 18 to 44) to access Facebook for news (70% compared to 60%), and younger Australians were more likely than older Australians to access Instagram (39% compared to 14%). Females were also more likely than males to access either Facebook (69%) or Instagram (36%) for news, while males were more likely than females to access YouTube (34%) for news.

While the majority of Australians who used social media and communication websites/apps to access news (66%) said that the content came from professional news outlets, there has been an increase in the proportion of Australians using social media and communication websites/apps to access news that comes from trusted professionals on personal accounts (39%, up from 24% in 2023), strangers (32%, up from 20% in 2023) and celebrities/social influencers (22%, up from 14% in 2023). Those aged 18 to 44 were more likely than those aged 45+ to use strangers (35% compared to 27%) and celebrities/influencers (25% compared to 15%) as a source of news on social media and communication websites/apps, and males were more likely than females to use trusted professionals on personal accounts as a source of news via this platform (45% compared to 33%).

The influence of social media platforms on news consumption

In 2024, Meta announced that it would not renew deals with news publishers to pay for content shared on its platforms under the News Media and Digital Platforms Mandatory Bargaining Code (the Bargaining Code). The impact of this decision on consumers could be significant, given the popularity of social media and communication websites/apps for accessing news. Of course, impacts on consumption will likely have flow-on effects on news providers, the extent of which are likely to vary greatly between businesses. Earlier in 2024, Macquarie estimated that the loss of deals with Meta could result in the Nine Network, the Seven Network and News Corp losing up to 9% of their net annual profit.[138]

While most Australian news businesses, including those with flagship programs on free-to-air TV, rely on social media to drive some traffic to their websites, digital-first publishers, and smaller, independent publishers, may have built audiences online that rely more heavily on social media to access news content.

Appearing before the Joint Select Committee on Social Media and Australian Society in June 2024, Chair of the Digital Publishers Alliance, Tim Duggan, spoke of the impact of Meta's decision on small and independent publishers. He noted that for some, as much as 60% of traffic was coming from Meta at that time. Duggan also articulated some of the likely impacts of any potential Meta news 'ban', including a reduction of traffic and revenue. Many submissions to the inquiry spoke to the potential impacts on Australian society and democracy should Meta discontinue its news service, due to the reliance by so many Australians on social media to access news.[139]

It is currently unclear how Meta will respond to the government's recently announced News Bargaining Incentive, which is intended to encourage large digital platforms to enter into or renew commercial deals with news publishers (see the News Media and Digital Platform Mandatory Bargaining Code section in chapter 1 for more detail).

We will continue to monitor this area for relevant developments, including the potential impact of Meta's response on Australian audiences who use social media to access news.

Finally, as noted earlier, how consumers encounter news via online intermediaries can be influenced by curation mechanisms such as algorithms, ranking and recommender systems. For Australian adults who used social media and communication websites/apps to access news in 2024, most said they saw news stories trending on their wall or feed posted by an account they don't follow (60%). This means that the diversity of news content Australians access via social media and communication websites/apps is limited by algorithmic logic. This was more pronounced for younger Australians (aged 18 to 44), who were more likely than those aged 45+ to access news on social media and communication websites/apps by seeing stories trending on their wall or feed posted by an account they don't follow (64% compared to 51%). This may be linked to the increase in the use of strangers and celebrities/influencers as sources of news on social media and communication websites/apps by this age group.

138 Sam Buckingham-Jones and John Kehoe, *It's War – Meta Pulls Out of News Deal*, 1 March 2024, accessed 12 March 2024.
139 Parliament of Australia, Joint Select Committee on Social Media and Australian Society – Parliament of Australia 2024, accessed 30 October 2024

Consumption by outlet

Both within and across platforms, Australians in 2024 preferred particular news outlets, with one news brand dominating in popularity. For those who accessed news via either of the 2 most popular platforms (free-to-air TV and news websites/apps), the ABC had the most popular news outlets, with 56% of adults accessing ABC on free-to-air TV and 54% accessing the ABC news website. On free-to-air TV, the ABC was followed by the Seven Network (51%) as the next most popular outlet. Demographic data shows that males were more likely than females (61% compared to 50%) to access the ABC on free-to-air TV, with no observable demographic differences for access to the Seven Network. The ABC also had the most popular outlet on free-to-air catch-up/streaming service, with 60% of Australians in 2024 having accessed ABC iview. For Australians using subscription TV, most used Foxtel to access news (86%), however, it is unclear which specific news channels under the Foxtel brand (for example, Sky News, CNN International) were being accessed.

For news websites/apps, the ABC News website was followed by news.com.au (37%) as the next most popular outlet for accessing news. While Australians aged 45+ were more likely than younger Australians to access the ABC News website (58% and 51% respectively), younger Australians (aged 18 to 44) were more likely than older Australians to access news.com.au (42% compared to 32%).

For print newspapers, The Australian[140] was the most popular outlet for accessing news (17%), followed by The Saturday Paper, which was more popular than in 2023 (14%, up from 5%). Fewer of us accessed the print edition of the Sydney Morning Herald (NSW) (7%, down from 13% in 2023). While older Australians were more likely to access news via print newspapers overall, the popularity of The Australian was driven by younger Australians, with those aged 18 to 44 more likely than older Australians to access news via this outlet. That said, sample sizes for this survey response option are small, so these demographic results should be interpreted with caution.

For audio, the ABC had the most popular outlets across all platforms, with 29% of Australians accessing an ABC news podcast, and 29% of us accessing the ABC via radio (AM/FM/DAB+) and via radio online (34%). That said, it is worth noting that the degree to which Australians rely on the ABC for news via one specific podcast might be overstated, as four of the ABC's daily (Mon-Fri) news podcasts (ABC News Daily, RN Breakfast, AM, and PM) were rolled into a single survey response option. Given the relatively high numbers in which Australians accessed news via radio platforms in 2024 (29% via radio (AM/FM/DAB+), and 34% via radio online), it is worth noting that Australians aged 45+ (57%) and males (47%) were more likely than their younger counterparts (26%) and females (37%) to access any radio platform for news in 2024.

As outlined above, the popularity of the ABC for accessing news is observable across all platforms, including professional news outlets via online intermediaries (53%). The only exceptions to this pattern of access are subscription TV and print newspapers, for which the ABC does not offer news services. The ubiquity of the ABC in the Australian news diet suggests it may have greater potential impact than less popular outlets. This is discussed further in Indicator 6 (trust and impact).

140 All newspaper codes refer to a national publication unless specified otherwise.

Discussion

The proportion of Australians accessing news has declined. This pattern of disengagement with news is consistent with the findings highlighted in the Digital News Report, which reported that 43% of Australian adults either 'sometimes or often' avoided the news. This is slightly higher than the global average, which The Reuters Institute reports as 39% and is more pronounced for women and young Australians (aged 18 to 26), who both avoided news at a higher rate than they did in 2023. Furthermore, roughly the same proportion of Australians who said they avoided news also experienced news fatigue (feeling 'worn out' by the amount of news), with 41% reporting news fatigue in 2024, compared to 28% in 2019. The Digital News Report shows that news fatigue and news avoidance are strongly correlated, which means that the recent decline in news access in Australia is likely influenced to some degree by news fatigue, and that news fatigue is experienced more so by women than men, and by younger people than older people.

The Digital News Report points to several possible causes of news fatigue, including coverage of wars, disasters and politics squeezing out other topics, lack of interest in news leading to lower tolerance for news exposure, and the prevalence of smartphones leading to increased exposure to news via alerts and notifications.

Australian adults accessed news via a range of platforms and news outlets in 2024. However, some sources were more popular than others. Free-to-air TV and news websites/apps continued to be the most popular platforms for the third year in a row, closely followed by social media and communication websites/apps, which were more likely to be accessed by younger Australians (aged 18 to 34) than any other age group. While Australian adults used fewer platforms on average to access news in 2024 compared to 2023, this may not mean that we used fewer outlets to access news. The ACMA plans to investigate this further in preparation for the next *News media in Australia* report.

The national broadcaster was popular with Australians for news in 2024, with the ABC having the most accessed outlets for all platforms on which it offered a news service. Overall, the outlets most popular with Australians for accessing news were serviced by major national broadcasters/publications, such as the ABC, the Seven Network and the Guardian Australia, with the exception of ABC local radio stations. This suggests that, at a national level, the news diet of Australian adults could be considered as relatively homogenised given the dominance of national and commercial broadcasters/publications in our consumption habits.

The impact of social media and communication websites/apps on news consumption was evident in 2024, however, there is room to explore the nature of news sources accessed on these platforms in greater depth. While Australian adults are most likely to access professional news outlets when using social media and communication websites/apps, they are also increasingly using these platforms to access news from a range of other sources, such as trusted professionals, celebrities and influencers, and strangers. That said, it is important to note that recall of outlets accessed is limited, with 20% of Australian adults who accessed news via social media and communication websites/apps reporting they didn't know where the news source was originally published.

In light of the above, the popularity of social media and communication websites/apps with younger Australians, and growing evidence of the prevalence of misinformation and disinformation in these spaces, it is important that we expand our research efforts to better understand the diversity of news consumed via these platforms and their potential to impact Australian audiences. This is particularly important given the increase in the use of sources on social media and communication websites/apps that cannot be verified as professional, such as celebrities/influencers. Whilst this increase may point to a more diverse news media diet for those using social media and communication websites/apps, the quality of these sources is unknown. This may also have implications for the professional news industry, noting the potential for consumer preferences to influence the types of content produced across markets over time.

Next steps

Indicator 5 has identified a number of news consumption patterns that can be used to understand exposure diversity in Australia. To expand on the insights from this initial report, the ACMA aims to implement several changes and enhancements to our current approach to measuring news consumption.

While the vast majority of Australians access news, we hope to better understand the decline in news access by including new questions in the 2025 ACMA annual consumer survey that will explore the drivers for disengagement with news and news fatigue. We will also seek to investigate the range of news outlets accessed by Australians within each platform, to determine, for example, if the decline in the average number of platforms accessed for news also translates to a decline in the number of outlets accessed for news.

Furthermore, because younger Australian adults and females are the most likely demographic groups not to access news and the most likely to access news via social media and communication websites/apps, we will monitor their consumption patterns closely. While there is currently no observable or causal relationship between disengagement with news and social media and communication websites/apps use, we will continue to monitor these areas and will seek to incorporate any additional insights into the next report.

We will also review survey questions to determine if additional consumption measures, such as the use of shares and likes on social media and communication websites/apps and the impact of consumers' social networks, can be used to enhance our understanding of how social media and communication websites/apps shape our access to, and engagement with, news content. Furthermore, we will determine if updates can be made to the ACMA annual consumer survey ahead of next year to capture more granular data for non-professional news sources accessed via social media and communication websites/apps apps to better understand their potential impact.

The influence of news accessed via social media and communication websites/apps and our major national broadcasters/publications on exposure diversity will continue to be a priority for the ACMA and future reports in this series.

9.

Indicator 6: trust and impact

What are the most impactful sources of news in Australia and what do we know about Australians' trust in news?

Key insights

- The ABC, and digital platform owners Meta and Alphabet (Google), are well placed to impact Australian audiences, based on the large share of audience attention they hold in Australia and the proportion of Australians who rely on one or more of their outlets to access news.
- The ABC holds a greater share of audience attention for Australians aged 45 and over, while Meta and Alphabet hold a greater share of audience attention for younger Australians, aged 18 to 44.
- Trust in news overall is declining, while for those who do retain trust in news, the SBS and the ABC are rated the most trustworthy brands.

➔ View the interactive data report for indicator 6.

Introduction

In indicator 6, we seek to understand the most 'impactful' sources of news in Australia, and to explore trust and distrust in news in the Australian market.

Understanding the impact of news and news brands has long been an issue of concern for policymakers and stakeholders both in Australia and overseas. However, as outlined in this chapter, identifying and quantifying the 'impact' of news generally, or of individual news brands, is both complex and challenging.

The inclusion of trust as an additional metric in this indicator is intended to support a deeper understanding of exposure diversity based on how Australians engage with, and relate to, the news media they consume.

Scope of the 2024 Framework

Impact

Academic research on impact is constantly evolving and impact itself is not consistently defined or universally understood as a concept.

In their Media Plurality Report, the UK Office of Communications (Ofcom) seeks to measure the impact of news outlets via a series of proxies. Ofcom notes that while no single proxy truly reflects impact, proxies play an important role in measuring impact, especially when a range of proxies are used in combination, as this allows researchers to draw on the data to validate common insights. The proxies used to measure the impact of news in the UK include a metric called 'share of attention' (discussed in more detail below), in combination with user data about the personal importance of news outlets, and perceptions of their impartiality, reliability and trustworthiness, including the extent to which users say an outlet helps them 'make up their mind' about issues.

The 2024 Framework adopts a similar approach to Ofcom, drawing on a combination of proxies to measure the impact of news outlets and brands on Australian adults.

Share of attention

The first proxy used for measuring news impact in the 2024 Framework is 'share of attention'. The share of attention measure was developed by Ofcom and is used to measure individuals' attention to a specific news source, as a share of their total engagement with all of the news sources they use. In other words, this measure looks at time spent engaging with a particular news source, relative to the total time spent engaging with all news sources used. This approach allows researchers 'to estimate the potential influence of a particular news source over individuals, specific demographic groups and wider society'.[141] For a detailed overview of how share of attention is calculated, please see Appendix F.

Reliance

The second proxy used as a measure of impact in the 2024 Framework is 'reliance' on specific news outlets, which is measured using the ACMA annual consumer survey. To measure this variable, respondents who identify that they use more than one outlet to access news are asked which of those outlets they rely on the most for news. For example, if a respondent identifies that they use 2 radio stations to access news, they are asked to identify which of those stations they consider they rely on the most. These results are then aggregated to allow an assessment of the importance of news outlets in Australia, based on consumers' reliance on them.

Trust

Following the 2023 consultation, and based on stakeholder feedback, we broadened the original scope of the 'impact' indicator to include a reference to audience 'trust'. Its inclusion reflects that trust has been shown to affect the extent to which we consume news and the ways we interact with it, including whether consumers are willing to pay for news (and the amount that they will pay for it).[142] Trust is measured using the News and Media Research Centre's Digital News Report, which examines levels of trust in news by demographic and other groups, brand, platform and factors that influence perceptions of trust.

Data sources

Data for indicator 6 has been drawn from the following 2 key sources.

The ACMA annual consumer survey

The ACMA annual consumer survey is conducted to support the ACMA's regulatory priorities. The data is collected online via the Social Research Centre's national probability-based online panel, Life in Australia™.

The 2024 Framework draws primarily on data collected from the survey's news module from 2023 to 2024. For more information on the contents of the news module, please see Appendix F.

More information on the methodology for this research, including the 2024 questionnaire is available on the ACMA website.

141 See Ofcom, Media plurality and online news, Annex 2: Measuring media plurality accessed 24 October 2024.
142 University of Canberra News and Media Research Centre, *Digital News Report: Australia*, 2024, accessed 15 July 2024.

The News and Media Research Centre's Digital News Report

Data for this source is collected annually by the University of Canberra's News and Media Research Centre, as part of an international survey run by the Reuters Institute for the Study of Journalism. The Australian data is collected using an online questionnaire, with the sample drawn from an online panel of adult Australians.

Data is made available by the Reuters Institute for the Study of Journalism under a Creative Commons licence.

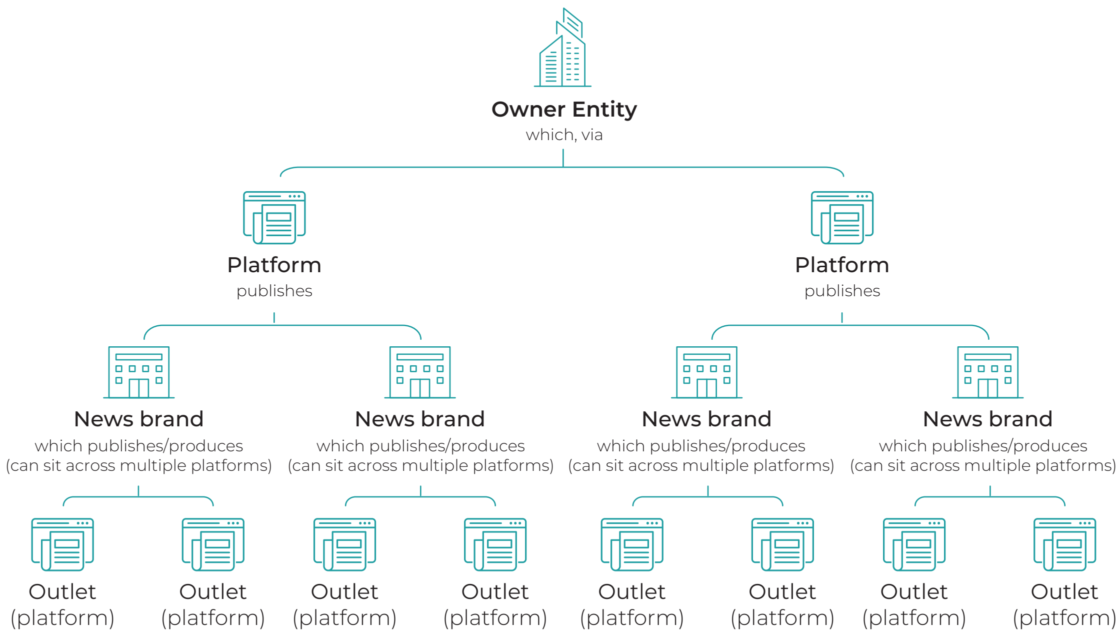
For more information on the methodological approach for this research, visit the News and Media Research Centre on the University of Canberra website.

Indicator 6 taxonomy

Figures 10 and 11 depict the taxonomy of concepts used to frame insights informed by the ACMA annual consumer survey for indicator 6 – namely, impact. While the annual consumer survey uses the term 'source' to describe a variety of news providers and distribution channels, for the purposes of reporting against indicator 6, we have used the term 'news outlet' to describe a specific provider of news content (for example, ABC iview, ABC News Radio), as distinct from 'platform', which is used to denote a distribution channel (for example, free-to-air TV, Radio (AM/FM/DAB+)). This allows for a more meaningful and accessible analysis. Please see the glossary in Appendix B for more details.

Figure 10 shows the structure of defined terms, while figure 11 applies these terms to an example arbitrarily selected from the ACMA annual consumer survey data.

Figure 10: Indicator 6 taxonomy (defined terms)[143]



143 For more information, see Appendix B: glossary.

Figure 11: Indicator 6 taxonomy (with example)[144,145]

Data limitations and gaps

Use of proxies

As noted above, rather than using direct measures of impact, the 2024 Framework relies on 2 proxy measures. While this approach is comparable to the approach taken by our counterparts at Ofcom, a more direct approach to measuring impact would yield more meaningful data. As noted by the Centre for Social Impact, typically, direct measurement would involve the assessment of long-term changes, or effects that have occurred because of a program, an intervention or a sector. For example, the Local and Independent News Association (LINA) recently partnered with Impact Architects to develop an impact tracking program that seeks to measure reader trust, increase in reader knowledge, social change, institutional accountability and media amplification of news stories they publish.

Reasons for reliance

One of the ACMA annual consumer survey variables used to inform results for impact is ‘reasons for reliance’ for the most relied on outlets by platform. However, some of the pre-set response options included in this question relate more to platform use (for example, reliance on free-to-air TV) than they do to outlet use (for example, reliance on the Network 10 channels on free-to-air TV), thus limiting the reliability of the data. For more details on the design of this question, please see Appendix F.

Scope of impact measurement

As discussed in chapter 3, the 2024 Framework considers the impact of various news brands and outlets on individual attitudes and decision-making, rather than broader impacts on public discourse, particular communities, local information environments, or policymaking, which have

144 For online intermediaries (described in detail in chapter 8), such as social media/comms websites/apps, search engines, and news aggregators, consumers’ experience is further mediated by platform owners not associated with news production, such as Meta, or Alphabet (Google).

145 News brands and outlets listed do not represent an exhaustive list of those published by the identified owner entity or news brand. News brands may also publish across a greater number of platforms than those represented in the diagram.

been the focus of other studies.[146] In taking this approach, we acknowledge that the extent to which these metrics capture the complexity of impact remains unclear, and many contextual factors, which are outside of the scope of the 2024 Framework, may also affect the impact of a news outlet or brand. For examples of alternative approaches to measuring impact, please see Appendix F.

Analysis

The 2024 Framework defines 'impact' as it relates to impact on *individual* attitudes and decision-making, rather than impact on public and political discourse, policymaking, or society more broadly. We use the measures of share of attention and reliance as proxies to understand which news brands and outlets are most impactful.

Our use of 'trust' as a concept is informed by the 2024 Digital News Report, which reports which news platforms and outlets are most trusted by Australians and what drives of trust.

The impact of news platforms, brands and outlets

Share of attention

The first proxy for measuring impact is share of attention, which is calculated at 3 levels: news brand, outlet and platform. While share of attention is typically calculated at the outlet or news brand level only, our additional calculation at the platform level allows for a more nuanced analysis.

At the news brand level, the ABC held the greatest share of Australian adults' attention in 2024, at 22%. The Nine Network held the second highest share, at 13%, and Meta and Alphabet (Google) held the equal third highest share at 12% each.

In chapter 8, we discuss how news published via 'online intermediaries' is subject to unique conditions compared to news published via other platforms (online intermediaries include services such as social media and communication websites/apps, online search engines (search engines) and online news aggregators (news aggregators), that host content for traditional news producers). This is chiefly due to the ability of digital platform providers in these spaces to curate news content according to their own algorithms and recommender systems, rather than traditional journalistic or editorial concerns. For this reason, and considering any potential Meta news bans, it is of interest to compare the relative impact of digital platform providers on Australian audiences compared to 'traditional' news producers.

When Meta and Alphabet are removed from the calculation, the Seven Network had the third greatest share, at 11%. Given the popularity of ABC news outlets across most platforms, it is not surprising to observe that the ABC brand holds the greatest share of Australia's attention.

Demographic data shows that the ABC brand has a 17% share of attention for 18 to 44-year-olds, and a 27% share of attention for those aged 45+, which broadly reinforces the access data discussed in indicator 5, which shows that for at least 4 ABC outlets (news websites/apps, podcasts, and 2 radio platforms), older Australians were more likely to access them than younger Australians.

146 Rasmus Kleis Nielsen, *Local Newspapers as Keystone Media: The Increased Importance of Diminished Newspapers for Local Political Information Environments,* 2015, accessed 29 July 2024; See for example, Marco Magasic, Kirsty Hess and Julie Freeman, *Examining the Social, Civic, and Political Impact of Local Newspaper Closure in Outback Australia,* 2023, accessed 22 July 2024; Kerry McCallum and Lisa Waller, *The Dynamics of News and Indigenous Policy in Australia,* Intellect Books, 2017.

A similar age divide is observable for the Nine Network, which has an 8% share of attention for 18 to 44-year-olds, and 17% share of attention for those aged 45+.

For Meta, the demographic data reveals a different pattern, with the digital platform provider holding a 21% share of attention for 18 to 44-year-olds, and only a 5% share of attention for those aged 45+.

When the Seven Network (with a 7% share of attention for 18 to 44-year-olds, and a 14% share for those aged 45+) is considered in place of Meta (as a provider of online intermediary services), the data shows that the news brands that hold the greatest share of Australians' attention do so primarily because they appeal to an older audience. Meta is the exception to this pattern, holding the third greatest share of Australians' attention, primarily via a younger audience. This is consistent with the access data, which shows that younger Australians are more likely than other age groups to access news via social media and communication websites/apps, many of which (for example, Instagram, Facebook and WhatsApp) are owned and controlled by Meta.

At an outlet level, Channel Seven on free-to-air TV held the greatest share of Australian adults' attention in 2024, at 9%. This was followed by Facebook (social media and communication websites/apps), with 8%, Channel Nine (free-to-air TV) with 8%, and ABC TV (free-to-air TV), with 8%. Considering the news brand calculation, where the Seven Network only ranked third in share of attention (excluding online intermediaries), it appears that the Seven Network's capacity for impact is primarily exercised via its free-to-air TV outlets, where it enjoys the majority share of attention, with Channel Nine taking a slightly smaller share. Details are outlined in Table 45, below.

Table 45: Share of attention by news brand and news outlet

Ranking by share of attention	News brand	News outlet
1	The ABC (22%)	Channel Seven free-to-air TV (9%)
2	The Nine Network (13%)	Facebook (8%)
3	Meta (12%)	Channel Nine free-to-air TV (8%)
4	The Seven Network (11%)	ABC TV (8%)

Base: Australians aged over 18 who accessed news in the past 7 days (QN1), and who accessed news from more than one outlet on a platform (N4). hart filtered to those who know the original news source (QN8): (n=1,298).
Source: ACMA annual consumer survey, June 2024, QN4a, QN4c. See Appendix F for more details.

Closely mirroring outcomes for brands and outlets, at a platform level, free-to-air TV held the greatest share of attention at 30%, followed by social media and communication websites/apps at 21%. News websites/apps had the third greatest share of attention, at 19%.

Reliance on traditional news outlets

The second proxy for impact used in the 2024 Framework is reliance, specifically which news outlets Australians say they rely on the most, and why. For Australian adults who accessed news via free-to-air TV – the most popular platform for accessing news in 2024 – the ABC was the most relied on outlet for the second year in a row (34% in 2023 and 2024), followed by the Seven Network, which was relied on the most by 27% of adults, and the Nine Network, which was relied on the most by 24% of adults. A similar pattern is observable on free-to-air catch-up TV, where ABC iview was the most relied on outlet (53%), followed by 9Now (19%), and 7Plus (15%). The reliance data for these platforms also mirrors patterns of access (that is, the most accessed outlets are also the most relied on outlets).

The top reasons Australians relied on the ABC, the Seven Network and the Nine Network, were because they use those outlets the most (47%), they are free to access (44%), and they have always used them (42%). These reasons were consistent for both these top outlets and for all outlets accessed via free-to-air TV. In other words, audiences seem to rely on outlets via free-to-air TV for the same reasons regardless of the outlet. This suggests that reasons for reliance may be associated with the platform, rather than the outlet itself. Given that older Australians (aged 75+) are more likely than any other age group to access news via free-to-air TV (88%), it is possible that for this age group, some of the news outlets that have the greatest capacity for impact are those that they access habitually via free-to-air TV.

For Australian adults who accessed news via news websites/apps, the ABC also had the most relied on platform, with 33% of consumers saying they rely most on the ABC News website. This was followed by news.com.au (17%), and the Guardian Australia website (9%). Like free-to-air TV, the reliance data for news websites/apps is consistent with the access data. The top reasons Australians relied on the ABC News website, news.com.au, and the Guardian Australia website were also the same top reasons listed for all outlets accessed via news websites/apps – that they are easy and free to access (45% and 44% respectively), with the third reason being trust in their journalists (38%).

Unlike free and easy access, trust in journalists implies an assessment of content and/or journalistic practice that transcends the features of the platform. Given those aged 35 to 44 use news websites/apps at a higher rate than the total population (52% compared to 46%), it is possible that this age group is more concerned with journalistic integrity when accessing news compared to other groups, such as those aged 45+, who are more likely to use free-to-air TV to access news (71%), and younger Australians (aged 18 to 34) who are more likely to use social media and communication websites/apps (60%).

For Australians who accessed news via either of the 2 radio platforms in 2024 (AM/FM/DAB+ and via the internet (or app) (excluding podcasts), the ABC was the most relied on outlet, with ABC News Radio[147] relied on by 23% of Australians for both platforms. This was followed by ABC Local Radio (13% and 22% respectively), and Triple J for radio (AM/FM/DAB+) (12%)/ABC Radio National for radio via the internet (14%). See Table 46 below for details.

Table 46: Most relied on radio outlets by platform

Ranking by reliance	AM/FM/DAB+	Via the internet
1	ABC News Radio (23%)	ABC News Radio (23%)
2	ABC Local Radio (13%)	ABC Local Radio (22%)
3	Triple J (12%)	ABC Radio National (14%)

Base: Australians aged 18 and over who accessed news from a platform in the past 7 days. Note: values less than 0.5% are not shown in chart, results for 'Don't know', 'Other' and 'Refused' not shown (% vary from 0-2% for 'Refused', 1-31% for 'Other', and 0-9% for 'Don't know'). See questionnaire for full category names.
Source: ACMA annual consumer survey, QN4. See Appendix F for more details.

The dominance of the ABC on radio platforms from both an access and reliance perspective could be driven by the consumption habits of older Australians, with those aged 45+ more likely than any other age group to access news via either of the 2 radio platforms (53% for AM/FM/DAB+, and 8% for radio via the internet). As noted earlier, a similar trend is observable on free-to-air TV, where the ABC is the most relied on outlet via a platform accessed most often by older Australians. This suggests that the ABC brand has considerable capacity for impact with older Australians.

147 All radio codes refer to a national broadcast unless specified otherwise.

While the ABC also had the most relied on news podcast (23%), this did not seem to be driven by any specific demographic group, although males were generally more likely than females (50% compared to 40%) to access news via any audio format. As noted in the previous chapter, the degree to which Australians rely on the ABC for news via one specific podcast might be overstated, as 4 of the ABC's daily (Monday to Friday) news podcasts (ABC News Daily, RN Breakfast, AM, and PM) were rolled into a single survey response option. The second most relied on news podcast was the 7am podcast (Schwartz Media), which was relied on by more Australians in 2024 compared to 2023 (6%, up from 2%).

Despite there not being clear demographic differences in accessing news via podcasts, our reasons for relying on ABC news podcasts the most suggest a point of difference when compared to other audio outlets, with the top reason being 'trust in its journalists' (50%). In comparison, for Australians who relied most on ABC News Radio via either radio platform, the reasons listed included that they use it the most (37% for AM/FM/DAB+ and 48% for radio via the internet), it's easy to access (48% and 55%), and it's free to access (47% and 48%).

Much like news websites/apps, those who rely on news podcasts appear to do so based on an assessment of content quality and/or journalistic integrity, and this is consistent across all podcast outlets. That said, access to podcasts for news was lower compared to other platforms and decreased compared to the previous year (7%, down from 10% in 2023), so reliance data for this platform may not translate to meaningful insights about impact.

For Australian adults who accessed news via print newspapers, The Australian[148] was not only the most relied on newspaper at 14%, but we relied on The Australian in greater numbers compared to 2023 (up from 8%). The Saturday Paper was the second most relied on print outlet (8%), which also increased from 2023 (up from 2%), followed by The Age (Vic) (7%). The top reasons Australians relied on The Australian were that they like the format (45%), they use it the most (38%), and they have always used it (22%). Aside from liking the format, which was also listed as a reason for relying on podcast outlets, this is largely consistent with the reasons given for other platforms.

Reliance on online intermediaries

For Australian adults who accessed news via social media and communication websites/apps, Facebook was the most relied on platform, at 46%, followed by YouTube (14%) and Instagram (14%) – which more of us relied on for news in 2024 compared to 2023 (up from 10%). The increase in reliance on Instagram for news is more pronounced in younger Australians, aged 18 to 34, who were more likely to rely most on Instagram for news than any other age group (22%). That said, given that younger Australians (aged 18 to 24) were more likely than any other age group to access news via social media and communication websites/apps (63%), their reliance on Instagram for news is not an anomaly, but rather indicative of the consumption habits of this age group. The fact that the reliance data for social media and communication websites/apps is largely consistent with the access data supports this.

The top reasons people relied on Facebook, YouTube and Instagram for news were that they are easy to access (50%), they use them the most (49%) and they're free to access (37%). This is also consistent across all platforms. For Australian adults who accessed news via news aggregators or search engines, Google News (57%) and Google Search were (92%) were the most relied on outlets. The top reason Australians relied on both Google News (62%) and Google Search (57%) was that they are easy to access.

148 All newspaper codes refer to a national publication unless specified otherwise.

Case study 4: Ngaarda Media

Image source: Ngaarda Media

About Ngaarda Media, the only First Nations media hub in the Pilbara

Ngaarda (pronounced NAA-DUH) Media is a First Nations community radio station serving the 500,000 km2 Pilbara region in WA's north. Ngaarda is the Yindjibarndi word for 'everybody'.[149]

'We are a voice for the 32 tribes of the Pilbara,' Ngaarda Media CEO Tangiora Hinaki explained. 'Not all of these voices get an opportunity to have their story heard on mainstream [media] ... whereas with community radio, we create content that is very unique.' Ngaarda Media produces a range of First Nations language and culture, sports, community and entertainment content, as well as what Tangiora describes as 'hard news'.[150] The broadcaster's contribution to public interest journalism has been recognised by the Public Interest Journalism Initiative (PIJI) since May 2023, when it was added to their Australian News Index (ANI).[151]

Hard news content produced by Ngaarda Media includes a daily statewide news bulletin focused on First Nations breaking news. The bulletin is the only one of its kind in the state and is freely distributed to other WA-based First Nations news brands. Ngaarda Media also has a memorandum of understanding (MoU) with NITV. The MoU allows the station's strongest stories to be shared with the national Indigenous broadcaster. 'We have an important role, being from the regions, making sure that we get those strong stories out,' Tangiora said. 'Often, they are picked up by mainstream media, which is awesome.'

149 Ngaarda Media, *Who we are*, Ngaarda Media website, n.d., accessed 28 October 2024.
150 The ACMA understands the concept of 'hard news' in this context to correspond with the concept of core news, defined in Appendix B.
151 G Dickson and M Germano, *Australian News Data Report: May 2023*, Public Interest Journalism Initiative, May 2023, accessed 28 October 2024.

The example below examines a story broken by Ngaarda Media in late 2021, which was then amplified by several national news brands, including those without an MoU with Ngaarda Media. It also reveals limitations in the Framework's approach to measuring trust and impact.

When mainstream media gets it wrong

In October 2021, a 4-year-old child was abducted from a remote campsite in WA. Tangiora said the story immediately attracted the attention of Ngaarda Media. 'When that news first hit, all newsrooms received the media release from police media, so we were all reporting', she explained. 'We report these things because, obviously, the public interest, [and] we all wanted her to be found. But we didn't break the story'. An ensuing 18-day search for the missing child (which ended with her being found and returned home) was covered extensively by Ngaarda Media, as well as several national and international news outlets.

While Ngaarda Media did not break the main story itself, the community broadcaster was first to identify a significant problem with the way the story had been reported by a popular commercial TV channel.

On the day the child was found, several news outlets turned their attention to unmasking the identity of the alleged abductor, who had been taken into police custody. A commercial TV channel reporting on the latest development showed photos of the alleged abductor in its broadcast news bulletins and online. Soon afterwards, Tangiora received a call from someone claiming to be the auntie of the man identified by the commercial TV channel. 'She just said, "Look, he's in hospital. He can't breathe. He's worried. He thinks everyone thinks he's a paedophile. It wasn't him.'" She wanted to get it out as quickly as possible', Tangiora said. Ngaarda Media was first to reveal the man pictured in the photos used by the TV channel (which had been sourced from social media) was not the alleged abductor, but in fact a First Nations father from the state's Pilbara region with a similar name on social media to the alleged abductor. He had been admitted to hospital with a panic attack following his misidentification.

Tangiora said people choose to come to Ngaarda Media in these instances because of the broadcaster's relationship with the community. '[People] trust Ngaarda Media. Why? Because we're a blackfella media hub. What does that mean? It means that we are culturally sensitive,' Tangiora explained. 'We would never ... just share a photo. We have to ask permission with Aboriginal people.' Tangiora said being locally based also made Ngaarda Media more accountable to the communities it serves. 'So, it could mean that we could have an angry family out the front of our office,' she said. 'That's how real it can get and that's what does happen.'

After Ngaarda Media broke the news, several national news brands picked up variations of the story, including the National Indigenous Times,[152] the Daily Mail,[153] the Sydney Morning Herald,[154] SBS,[155] and British public broadcaster, the BBC.[156] An interview with the misidentified man posted on Ngaarda Media's Facebook page was viewed more than 500,000 times,[157]

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152 R Knowles, 'Aboriginal man misidentified as Cleo Smith abductor to take legal action against Seven Network', *National Indigenous Times*, 5 November 2021, accessed 28 October 2024.

153 P Collins, 'EXCLUSIVE: Aboriginal man wrongly identified as Cleo Smith's suspected kidnapper is threatened with SPEARING - as elders hold crisis talks with police over racist backlash fears', *Daily Mail Australia*, 4 November 2021, accessed 28 October 2024.

154 M Whitbourn, 'Man wrongly named as Cleo Smith abduction suspect launches defamation action against Seven', *The Sydney Morning Herald*, 16 November 2021, accessed 28 October 2024.

155 J Perry and L Kerin, 'Aboriginal man wrongly named as Cleo Smith abductor plans to sue Seven Network', SBS, 4 November 2021, accessed 28 October 2024.

156 BBC, 'Cleo Smith: Man wrongly identified as abduction suspect sues TV station', BBC, 17 November 2021, accessed 28 October 2024.

157 Ngaarda Media, 'Terrance Flowers Plans To Sue Media Outlet Who Shared Photos ...' [Facebook post], Ngaarda Media, 4 November 2021, accessed 28 October 2024.

well above the estimated 60,000 people reached by Ngaarda Media's physical transmitter stations.[158] The TV channel responsible for misidentifying the man also issued an apology and removed the photos published online. 'We led the national news,' Tangiora said. 'We broke it from the humble community of Roebourne in the Pilbara of WA, and it went far and wide nationally.' Ngaarda Media's news-breaking role was acknowledged with a community radio excellence award[159] and in an episode of the ABC's Media Watch program.[160] 'Usually, journalists don't want to be on Media Watch,' Tangiora said. 'But we were on Media Watch for the right reasons.'

Locating Ngaarda Media in the Framework

Ngaarda Media is better represented in the 'source diversity' pillar of the Framework, than it is in its 'exposure diversity' pillar. The source diversity pillar includes the first 3 indicators of the Framework, which identify professional news outlets (including their ownership and control) and the professional news workforce. Notwithstanding limitations in measuring the professional news workforce, which may disproportionately affect community radio stations (discussed further in chapter 5), the community broadcaster has been counted as a professional news outlet. While the 2024 Framework has not excluded any community radio stations, Ngaarda Media's eligibility has been further verified through its inclusion in PIJI's ANI and by the Community Broadcasting Association of Australia's (CBAA) monitoring activities (discussed further in case study 5 in Appendix D).

Image source: Ngaarda Media

158 Ngaarda Media, *About Us*, Ngaarda Media website, accessed 28 October 2024.
159 Ngaarda Media, 'Ngaarda Media win three national community radio awards', Ngaarda Media website, accessed 28 October 2024.
160 ABC (Australian Broadcasting Corporation), *Media Watch* [video], *ABC News (Australia)* website, ABC iView, 8 November 2021, accessed 28 October 2024.

However, the community broadcaster is not as well represented in the exposure diversity pillar of the Framework, which measures consumption, trust and impact. While this case study highlights the broad reach and impact of Ngaarda Media's reporting, several methodological limitations make it difficult for smaller news brands, like community broadcasters, to be represented in the exposure diversity pillar of the 2024 Framework. This echoes issues raised in 2023 consultations by stakeholders, such as the CBAA and others, about whether the Framework could accurately capture the community broadcasting sector's contribution to the Australian news market, and particularly to underrepresented and underserved communities.

The approach in the 2024 Framework to measuring news consumption, impact and trust relies on aggregated responses to ACMA and third-party consumer surveys. This results in well-known news outlets, often with national footprints, consistently leading all 3 metrics. The way impact itself is measured is also reliant on the audience-centric proxies of reliance and share of attention (discussed further in chapter 9), meaning the Framework can only measure impact as it relates to individuals' or demographic groups' attitudes and decision making. This case study exposes several limitations with this approach, particularly in measuring impact. These include its inability to capture the impact of public and political discourse, of individual news stories (as opposed to news brands or outlets) and, of one news brand on other news brands (that is, agenda setting).[161] While the Framework does not use trust as a proxy for impact, this case study suggests that Ngaarda Media's trusted status in the Pilbara was linked to it being granted exclusive access to the impactful story described in this case study.

161 Other measurement approaches with a potentially greater capacity to represent these types of impact, like LINA's impact tracking program, are discussed in chapter 9.

Trust

The 2024 Digital News Report found that Australians' trust in news is falling, and Australians' distrust in news is increasing. As such, the gap between those Australians who trust news (40%) and the those who distrust news (33%) is narrowing.[162] The insights from the report are supported by other third-party data about the extent to which Australians trust news and media. For example, the Edelman Trust Barometer also found the same level of trust (40%) by Australians in media generally.[163] However, unlike the Digital News Report, where Australian's levels of trust in news sits roughly on par with the global average, the Edelman Trust Barometer placed Australia 10 percentage points below the global average of 50% (although it is important to note that the global average for the Edelman Trust Barometer was calculated from a different sample of countries to the Digital News Report).[164]

Trust in news by demographic

The Digital News Report explores levels of trust and distrust in news through several demographic and other groups. While the report shows that there has been a decline in trust across all demographics since 2023, the biggest falls between 2023 and 2024 are among those with high levels of education and income.[165]

Insights from the Digital News Report show an increasing gender gap in news consumption and attitudes in Australia over the past 2 years, with levels of trust in news falling more rapidly among women. The authors note that 'the proportion of women who agree they can 'trust most news most of the time' has fallen from 42% in 2022 to 37% in 2024, while the proportion of men who agreed that they can 'trust most news most of the time' increased during that period from 40% to 44% (although there was a decline between 2023 (48%) and 2024 (44%)).[166]

The report also notes the growing number of people who disagree with the statement 'I trust most news most of the time' cannot be viewed homogenously. For some, their distrust may reflect a growing scepticism which drives them to continue or even increase their news consumption to seek verification from other sources. Others may become more cynical towards the news, which can lead to disengagement.[167]

In terms of the role of education level in trust in news, the greatest falls in trust since 2023 were among those with high levels of education, although they still had the highest levels of trust. Distrust was highest among those with medium education, while the greatest rises in distrust were found among people with low education.

There are also differences between Australians depending on income and where they live, with trust in news falling slightly more in regional areas between 2023 and 2024 (41% to 37%) compared to major cities (44% to 42%).[168] Since 2023, there have also been greater falls in trust in news among those with high levels of income, although there has been a decline among people with lower income as well.

162 See Digital News Report: Australia - University of Canberra, page 11, accessed 24 October 2024.
163 In the Edelman Trust Barameter survey Australian's were asked to indicate how much they the media (among other institutions asked to do what is right using a 9-point scale. See Research | Edelman Australia accessed 24 October 2024.
164 See 2025 Edelman Trust Barometer accessed 24 October 2024.
165 See *Digital News Report: Australia - University of Canberra,* page 114, accessed 24 October 2024.
166 See *Digital News Report: Australia - University of Canberra*.
167 See *Digital News Report: Australia - University of Canberra,* page 130, accessed 24 October 2024.
168 See *Digital News Report: Australia - University of Canberra*.

In terms of levels of trust in news by age, the Digital News Report shows that trust in news for 27 to 42-year-olds, 43 to 58-year-olds and those aged 59+ fell between 2023 and 2024. The exception to this trend is 18 to 26-year-olds, whose trust in news rose (to 36%).[169] However, this age group is still the least trustful of news overall. Tables 47 and 48 show a summary of changes to trust and distrust in news from 2023 to 2024 by demographic group.

Table 47: Changes in trust in news by demographic[170]

Demographic	Increase in trust	Decrease in trust
Generation	Gen Z (18–26) (36% +4 percentage points (pp))	Gen Y (27–42) (38% -5pp)
		Gen X (43–58) (43% -5pp)
		Baby Boomer and older (59+) (42% -2pp)
Gender	N/A	Male (44% -4pp)
		Female (37% -2pp)
Education	N/A	Low (43% - 3pp)
		Medium (38% -1pp)
		High (43% -6pp)
Income	N/A	Low (39% -3pp)
		Medium (45% -3pp)
		High (42% -5pp)
Region	N/A	Major city (42% -2pp)
		Regional area (37% -4pp)

Table 48: Changes in distrust in news by demographic[171]

Demographic[172]	Increase in distrust	Decrease in distrust
Gender	Male (32% +4pp)	N/A
	Female (34% +1pp)	
Education	Low (30% +2pp)	N/A
	Medium (38% +4pp)	
	High (30% + 1pp)	
Income	Low (34% +4pp)	N/A
	Medium (34% +3pp)	
	High (33% +3pp)	
Region	Major city (32% +1pp)	N/A
	Regional area (35% +5pp)	

169 See *Digital News Report: Australia - University of Canberra,* page 114, accessed 24 October 2024.
170 See *Digital News Report: Australia - University of Canberra*..
171 See *Digital News Report: Australia - University of Canberra,* page 114–5, accessed 24 October 2024.
172 Please note, the University of Canberra did not publish data on distrust in news by generation in the 2024 Digital News Report.

Trust in news by main platform

According to the 2024 Digital News Report, Australians' trust in their main platforms used to access news all declined in 2024 except for print, which has seen a steady increase in trust from 39% in 2020 to 57% in 2024. Trust in news among people who use radio as their main platform for news saw the greatest decline between 2023 and 2024 (37%, down from 46%), followed by TV news viewers, whose trust in news fell from 54% to 49%. In terms of digital platforms, Australians who use the internet as their main platform for news showed a slight decline in their levels of trust of online news from 42% to 41% while social media users reported no change. However, trust in news by those who mainly access it via social media continues to be the lowest at 31%.[173]

Trust in news by non-demographic consumer groupings

Several non-demographic groupings are also used in the Digital News Report to segment Australians' trust and distrust in news, including by news consumption level, political affiliation, interest in politics and news payment. Within these groupings, heavy news consumers, those who identify as politically centrist, and those with a high level of political interest, had higher levels of trust in news generally and lower levels of distrust,[174] compared to other consumer groupings. When asked about trust in news they personally use ('my news', as opposed to news generally), levels of trust increased across all consumer groupings.

According to the Digital News Report, this trend broadly aligns with higher levels of trust in 'my news' both globally and in Australia compared with news generally.[175] However, increases in trust in 'my news' among consumer groupings are not uniform. For example, those who pay for news reported some of the highest levels of trust (70%) and lowest levels of distrust (14%) in response to this question, suggesting news outlets have been able to maintain the trust of their paying audiences. While among non-payers, trust in the news they personally use was 46% (compared to 70% for payers) and distrust had risen since 2021 to 27%, compared to 14% for payers.[176] Similar disparities in trust and distrust are visible between heavy and light news consumers and those with high and low levels of political interest, when asked about the news they personally use.

Interestingly, the wider disparities in trust and distrust in the 'trust in my news' category for 2024 are predominantly driven by heavy news consumers and those with high levels of political interest. These 2 groups reported substantial boosts in trust (between 15 and 17 percentage points) and equally substantial drops in distrust (between 12 and 15 percentage points) in the news they use, compared to news generally. However, light news consumers and those with low levels of political interest are only modestly more trusting (between 5 and 6 percentage points) and less distrustful (between 6 and 7 percentage points) of the news they personally use. A similar trend is visible among left- and right-wing news consumers, who report substantially higher trust in the news they use, compared to trust in news generally.[177] The table below summarises these differences across consumer groups.

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173 See *Digital News Report: Australia - University of Canberra,* page 115, accessed 24 October 2024.
174 Distrust in news by political orientation data was not published in the Digital News Report.
175 See *Digital News Report: Australia - University of Canberra,* page 113, accessed 24 October 2024.
176 See *Digital News Report: Australia - University of Canberra,* page 115, accessed 24 October 2024.
177 See *Digital News Report: Australia - University of Canberra,* page 115–6, accessed 24 October 2024.

Table 49: Trust in news/news I personally use[178]

Consumer group	Trust in news	Trust in news I personally use
High political interest	49%	66% (+17 pp)
Low political interest	36%	43% (+7 pp)
Left-wing	40%	56% (+16 pp)
Right-wing	40%	53% (+13 pp)
Heavy consumers	45%	60% (+15 pp)
Light consumers	37%	42% (+ 5 pp)

Trust in news by brand

The Digital News Report also measures trust in news by brand. When asked how trustworthy they find news from certain news brands, Australians' trust in news for all brands included in the Digital News Report survey fell in 2024.

The most highly trusted news brands in Australia for 2024 were SBS (65%) followed closely by the ABC (64%) and then by local or regional newspapers (60%), BBC News (59%) and Nine News (55%). In 2023, SBS and ABC held the equal highest level of trust, at 66%, with trust in ABC falling marginally more in 2024 than SBS.[179] This is interesting, given SBS failed to rank in the top 3 for most accessed or most relied on outlets for any of the platforms it offers services on, showing that trust and access are not always necessarily related.

Factors that influence Australians' perceptions of trust in news

In 2024, the Digital News Report survey included a new question asking Australians how important or unimportant certain factors are when it comes to deciding which news outlets they trust. The most important factor for deciding to trust a news outlet was journalistic standards (81%), closely followed by transparency about the outlet's editorial process (80%), then bias (77%), then whether they feel fairly represented (75%) and sensationalism in reporting (74%).[180] The report notes that the findings about the factors influencing Australians' perceptions of trust reflect trends that have been seen globally:

> Among 36 countries in the survey, transparency was the most important factor influencing decisions to trust the news (72% global average) and high journalistic standards were the second most important factor (70% global average). Australians were among the highest in ranking journalistic standards and transparency as important factors.[181]

Another factor contributing to trust in news is news fatigue, with the report noting 'there appears to be a relationship between news fatigue and people's trust in news'.[182] The results from the 2024 report show that Australians who say they are not worn out by the news tend to have much higher trust in news in general (53%) and the news they choose to consume (65%), compared to those who say they are worn out by it, with trust in news in general at 35%, and trust in 'my news' at 44%. Similarly, those Australians who never avoid news are more likely to trust news (55% for news in general and 65% for 'my news').[183] This suggests that lack of trust might be a contributing factor to the decline in news access in Australia overall.

178 See *Digital News Report: Australia - University of Canberra*.
179 See *Digital News Report: Australia - University of Canberra,* page 121, accessed 24 October 2024.
180 See *Digital News Report: Australia - University of Canberra,* page 117, accessed 24 October 2024.
181 See *Digital News Report: Australia - University of Canberra*.
182 See *Digital News Report: Australia - University of Canberra,* page 116, accessed 24 October 2024.
183 See *Digital News Report: Australia - University of Canberra*.

The ACMA will consider this when designing new questions for the 2025 annual consumer survey on drivers of disengagement with news (see the *Next steps* sections of chapters 8 and 9 for more information).

The Digital News Report notes a strong relationship between trust in news and whether Australians are comfortable with the use of artificial intelligence (AI) in news production. Of those Australians who reported that they trust news most of the time, 27% said they were comfortable with it being produced mostly by AI with human assistance compared to only 11% of those who reported they distrust news. The latter group were the most likely to say they are somewhat or very uncomfortable with this scenario (70%), compared to those who trust news (53%), with the report noting that ‘for people who don’t trust the news, the increasing role of AI may add another layer of uncertainty in an online environment where it is difficult to discern reliable information’.[184]

Discussion

The impact of news on Australian adults appears to be driven by a range of complex factors, as does our trust in news. One of the most apparent insights on news impact is that the ABC, and the digital platform providers Meta and Alphabet (Google), may be well placed to impact Australian audiences, based on the share of consumer attention each holds and the proportion of Australians who rely on one or more ABC outlets and/or Facebook, Google Search or Google News to access news.

While traditional news outlets and brands held the greatest share of attention overall, the relative share of attention held by social media and communication websites/apps is noteworthy. As discussed in the analysis, Meta, which owns both Facebook and Instagram, held the third greatest share of Australians’ attention, tied with Alphabet (Google), and Facebook held the second greatest share of Australians’ attention, tied with two traditional news outlets. This means that Meta, and particularly Facebook, held a relatively large share of attention for news consumption in 2024. Furthermore, at a platform level, social media and communication websites/apps held the second greatest share of attention, surpassed only by free-to-air TV. This means that the impact of social media and communication websites/apps is observable at all levels – brand, outlet and platform.

The impact of our public broadcaster and social media platforms varies by demographic group. While the impact of the ABC on Australian audiences looks to be slightly skewed towards older adults (aged 45+), the impact of Meta appears to be skewed somewhat towards younger Australians (aged 18 to 45), meaning that it will be important for us to understand the drivers for engagement for both sources in future, and to continue to monitor patterns of news access by age group. Furthermore, for those who use social media and communication websites/apps for news, reliance on these platforms is driven by habitual use. This has implications for the impact of news on younger Australians, particularly given the uncertainty around the ongoing availability of news via Meta platforms.

As noted in indicator 5, Australians who accessed news via ssocial media and communication websites/apps in 2024 also did so in greater numbers via trusted professionals using personal accounts, strangers and celebrities/influencers. While these sources can act as pathways to professional news outlets (for example, when a celebrity shares a story from a professional outlet on their page), they can also be used as pathways to or as providers of non-professional news, drawing attention to the potential for non-professional news sources to impact both the quality and diversity of news exposure in Australia.

184 See *Digital News Report: Australia - University of Canberra,* page 26, accessed 24 October 2024.

The Digital News Report shows that Australians' trust in news has declined in 2024, while distrust in news has increased – with some evidence to suggest this could be linked to news fatigue. For those who do trust news, the SBS and ABC were rated as the most trustworthy news brands. Levels of trust in news varied by demographic and consumer groupings (including education, political interest, and levels of consumption), with commonality found in the factors that influence Australians' perceptions of trustworthiness in news, chiefly being journalistic standards and transparency of the outlet's editorial process. Understanding the factors that contribute to trust (and distrust) in news can help inform approaches of news organisations and governments in seeking to build greater trust in news.

Next steps

Given the complexity of news impact and trust in news, expanding research to incorporate new/additional measures will be a priority for the ACMA for both metrics. Some of this work is already underway, with plans to incorporate measures of trust into the 2025 ACMA annual consumer survey. This additional research will allow us to more clearly identify and assess intersections between impact and trust and exposure diversity in future reports. We will also consider if and how we can begin to explore the relationship between trust and impact, if one exists.

We will continue to monitor news access via the ABC, Meta-owned platforms and Alphabet (Google)-owned platforms given the relative potential of each to impact Australian adults. Where feasible, we will consider if additional research might help us to understand what makes these news sources popular, and the effect that has on exposure diversity.

Acknowledging the limitations of our current approach to collecting impact data, we will assess if a more direct, longitudinal approach to measuring impact is feasible for future reports, and the potential to broaden the scope of our impact assessment to include impact on marginalised communities, policymaking, and social discourse.

10.

Conclusion and next steps

The *News media in Australia: 2025 report* represents the first stage of implementation of the ACMA's Media Diversity Measurement Framework. Accompanied by a suite of interactive data reports, this report brings together existing ACMA and third-party data to provide a snapshot of the state of news media diversity in Australia.

The report highlights some of the challenges and opportunities facing news media diversity in Australia using the Framework's 6 indicators. It reveals aspects of a dynamic and robust news landscape, as well as areas in need of further consideration. It is evident that social media and other digital platforms continue to reshape the Australian news market, which is challenged by declining consumption of news and audience distrust. The report has also highlighted the decreasing number of journalists in Australia overall and the number of journalists increasingly working outside of traditional reporting roles, reflecting the rapidly changing nature of the industry.

Despite an overall decrease in consumption, Australians continue to access news across a range of platforms and outlets. Many news businesses have also seized opportunities presented by the digital environment, with news website/app outlets the most prevalent type of professional news outlet identified under the Framework. However, the challenges set out above are likely to continue to have a significant and uncertain influence on media diversity and public interest journalism, highlighting the importance of fit-for-purpose policy and regulatory settings.

Released in October 2024, the Second Interim Report from the Joint Select Committee on Social Media and Australian Society recommended that the Australian Government explore alternative revenue mechanisms to sustain public interest journalism and support digital media literacy initiatives in response to myriad, complex challenges.

The government's December 2024 announcement under the News MAP initiative addresses this need to actively support public interest journalism and local and regional news in response to these challenges on the best available evidence. This includes the proposed establishment of a new expert advisory panel to provide advice on the design and targeting of mechanisms to support sustainability and capacity building in the news market.

The *News media in Australia* series will help to inform future evidence-based policy in relation to public interest journalism and media diversity. While this report offers some significant initial insights, we will seek to strengthen the data used to inform the 6 existing indicators in the Framework and assess opportunities to broaden the scope of the Framework. This includes through the consideration of the unique and diverse experiences of communities that are often marginalised or under-represented in news and media and more broadly in Australian society.

Developing a comprehensive framework is not work that the ACMA can undertake in isolation. We acknowledge that there is a wealth of expertise within the news media industry, academia and non-government organisations and we will continue to progress this work in consultation with, and where appropriate, in partnership with, relevant stakeholders. This report lays the groundwork for further consultation and collaboration to address current gaps and explore new directions for the Framework. We look forward to considering new research opportunities to support a fuller understanding of news media diversity in Australia.

While the next *News media in Australia* report is intended for release in 2 years' time, the ACMA will endeavour to regularly update the interactive data reports and release new research as it becomes available. We look forward to strengthening the Framework and contributing to a more robust, sustainable and diverse news media landscape that can benefit Australian audiences, communities and society.

Appendix A: list of shortened forms

This report includes a number of shortened forms, outlined in the table below.

Table 50: Shortened forms

Shortened form	Term
ABC	Australian Broadcasting Corporation
ABR	Australian Business Register
ABS	Australian Bureau of Statistics
ACCC	Australian Competition and Consumer Commission
ACMA	Australian Communications and Media Authority
ACS	Annual consumer survey
ACT	Australian Capital Territory
AFMRC	Australians for a Murdoch Royal Commission
AI	Artificial intelligence
AMAN	Australian Muslim Advocacy Network
ANI	Australian News Index
ANSP	Australian News Sampling Project
ANZSCO	Australian and New Zealand Standard Classification of Occupations
Bargaining Code	News Media and Digital Platforms Mandatory Bargaining Code
BBC	British Broadcasting Corporation
BSA	*Broadcasting Services Act 1992*
CBAA	Community Broadcasting Association of Australia
CEO	Chief Executive Officer
CMAA	Christian Media and Arts Australia
CMT	Centre for Media Transition
EU	European Union
FNMA	First Nations Media Australia
Framework	Media Diversity Measurement Framework
Gen	Generation
LGA	Local government area
LINA	Local and Independent News Association
MDA	Media Diversity Australia
MEAA	Media, Entertainment and Arts Alliance
MoU	Memorandum of understanding
MPM	Media Pluralism Monitor
N&MRC	News and Media Research Centre

News MAP	News Media Assistance Program
Non-BSB	Non-Broadcasting Services Bands
NSW	New South Wales
NT	Northern Territory
Ofcom	United Kingdom Office of Communications
PIJ	Public Interest Journalism
PIJI	Public Interest Journalism Initiative
QLD	Queensland
RRL	Register of Radiocommunications Licences
SA	South Australia
SBS	Special Broadcasting Service
Tas	Tasmania
UK	United Kingdom
US	United States
Vic	Victoria
WA	Western Australia

Appendix B: glossary

Feedback to our 2023 consultations highlighted that a shared understanding of key terminology is needed to support correct interpretation of the report and data presented.

Sources have been provided for definitions provided externally. All other definitions have been developed by the ACMA (either as part of our annual consumer survey or for the purposes of this report). Note, bolded text denotes terms defined in this glossary.

A glossary of terms used in accompanying interactive data reports is available on the ACMA website.

Control refers to the *Broadcasting Services Act 1992* (BSA) (Schedule 1, Part 2) definition, that a person is in a position to exercise control of a company, broadcasting licence or associated newspaper, if the person meets one of the following:

- has company interests exceeding 15%
- is the licensee
- can control the selection or provision of a significant proportion of the licensee's programming
- can control a significant proportion of the operations of the company
- can appoint, secure or veto the appointment of at least half of the board of directors, or
- can exercise direction or restraint over any substantial issue affecting the management or affairs of the licensee or company.

The BSA establishes that 'control' covers various formal and informal arrangements, including trusts, agreements, and practices through which a person is in a position to exercise control of a company, broadcasting licence or newspaper. More than one person may be in a position to exercise control of a company, broadcasting licence or a newspaper.

Controller refers to a person in a position to exercise **control** over a **news outlet**.

Core news refers to content that reports, investigates, or explains issues or events that are relevant to engaging Australians in public debate and informing democratic decision making; or current issues or events of public significance for Australians at a local, regional or national level. (Source: Explanatory Memorandum to the Treasury Laws Amendment (News Media and Digital Platforms Mandatory Bargaining Code) Bill 2021).

Covered news refers to content including sports and entertainment news, such as interviews with coaches and players, reporting about the entertainment, coverage of reality television and some talk-back radio discussions. (Source: Public Interest Journalism Initiative Glossary).

Free-to-air catch-up/streaming (also known as **broadcasting video on demand service**) refers to internet services typically provided on smart TVs and free-to-air and subscription broadcasters' websites. These services allow users to watch a selection of previously screened content on-demand. Examples include ABC iview, 10 Play and 7Plus for free-to-air programs, and Foxtel Go for subscription broadcasters.

Free-to-air TV *refers to b*roadcast television services where the signal (and therefore content) is delivered without charge to the viewer. Examples include channels 7, 9, 10, ABC, SBS, 9Go! and 7Mate.

Independent brand refers to a **news brand** that has not been identified as part of a **network** under the Framework.

Interactive data report refers to an online visual report on the ACMA website, used to present the data that underpins insights in this written report. Each indicator of the Framework (except indicator 4) has an associated interactive report.

Journalist refers to the Australian and New Zealand Standard Classification of Occupations' definition of 'Journalists and Other Writers'. Data excludes the subcategories 'Technical writer' and Copywriter'. (Source: Australian Bureau of Statistics).

Main platform refers to the platform that the ACMA annual consumer survey respondents reported as their main source of news over the past 7 days (for respondents who accessed news via more than one platform in the past 7 days).

Metropolitan refers to respondents of the ACMA annual consumer survey who live in a state or territory capital city. (Source: Australian Bureau of Statistics' Greater Capital City Statistical Area definitions).

Network refers to a group of **news outlets**, spanning at least 2 **news brands** that share at least one **owner** and/or **controller**. Note: for the 2024 Framework, each **outlet** is only assigned to one primary network.

News refers to any factual reporting by journalists or other information on current events at either a local, regional, national or international level (see also **professional news**).

News brand refers to a name used to publicly identify one or more **news outlets**. A company may operate multiple news brands, for example, News Corp Australia operates news brands including the *Courier Mail,* the *Daily Telegraph* and *The Australian,* each of which has multiple news outlets, including a print newspaper and a news website.

News outlet refers to a content distribution channel of a news brand, including:

- a newspaper (print or digital editions)
- a free-to-air TV station (broadcast or streamed via a website/app)
- a subscription TV station (broadcast or streamed via a website/app)
- a radio station (broadcast or streamed via a website/app)
- a news website/app (or part of a website/app)
- a podcast (excluding radio programs republished online)
- a magazine (print or digital editions)
- a social media page or group
- an email newsletter

News website/app refers to a website or app designed for the specific purpose of publishing professionally produced news content. Examples include news.com.au and the ABC News website.

Online intermediaries refers to services that operate between news producers and consumers, including news aggregators/apps, search engines, and social media/communication websites/apps.

Online news aggregator/app refers to an online platform or software device that collects news stories and other information as it is published and organises it in in a specific manner (usually in one location) for easy viewing. Examples include Apple News and Microsoft Network News.

Owner refers to the legal person or entity responsible for ensuring the content of a **news outlet** complies with relevant professional standards.

Platform refers to the delivery mechanism for news content, for example, **free-to-air TV**, **subscription/pay TV**, **news websites/apps**, and **podcasts**. Digital platforms and services that provide access to other **news outlets**' content, such as a search engine, **online news aggregators**, and social media, are referred to as **online intermediaries**.

Podcast refers to audio content made available for download or streaming via the internet. Examples include *From The Newsroom* and *7am*.

Professional news refers to news produced by a **news outlet** that adheres to professional standards, is editorially independent, operates predominantly in Australia, and produces publicly available news content.

Print newspaper refers to publications containing news articles, features, editorials, and advertisements, usually distributed daily or weekly to subscribers or sold at newsstands, covering local, national and international news and topics. Examples include the *Herald Sun* and *The Australian*.

Public interest journalism refers to original content that records, reports, or investigates issues of public significance for Australians, issues relevant to engaging Australians in public debate, and in informing democratic decision making, or content that relates to community and local events. *(Source:* Public Interest Journalism Initiative Glossary).

Radio (AM/FM/DAB+) refers to broadcast radio over AM, FM or DAB+ (digital) services. It does not include listening to **radio via the internet/app** or **podcasts**. Examples include ABC News Radio and 3AW.

Radio via the internet/app refers to audio content accessible over the internet, allowing users to listen to radio stations, programs, or channels online via websites, apps, or internet radio platforms. Examples include SBS Audio (website), ABC Listen (app) and iHeart (internet radio platform).

Regional refers to respondents of the ACMA annual consumer survey who live in locations outside a state or territory capital city. (Source: Australian Bureau of Statistics Greater Capital City Statistical Area definitions.

Remoteness classes refer to the 5 classes of relative geographic remoteness across Australia:

- Major Cities in Australia
- Inner Regional Australia
- Outer Regional Australia
- Remote Australia
- Very Remote Australia

(Source: Australian Bureau of Statistics).

Search engine refers to a website or app that uses algorithms to allow users to search for and access information on the internet. Examples include Google and Duck Duck Go.

Share of attention refers to an estimate of relative attention given to a **news outlet**, **news brand** or **platform**. It is first calculated at the individual level before being aggregated across all users, to produce an overall share of attention for each news source.

Social media/communications website/app refers to websites and applications that enable users to create, share and consume content online and enable people to communicate and participate in social networking. Examples include Facebook and WhatsApp.

Subscription/pay TV refers to television services provided on a subscription basis, offering a wide range of channels, programs and content packages to subscribers in exchange for a monthly fee, delivered via cable, satellite, IPTV or internet streaming. For example, Foxtel.

Traditional sources of news refers to the sources from which Australians have historically sought their news – TV, radio and print.

Viewpoint diversity refers to inclusion of/exposure to multiple perspectives and/or ideas.

Appendix C: summary of 2023 consultation findings and ACMA responses

Consultations and workshops

In 2023, we released a consultation paper seeking feedback on the feasibility and scope of a framework to measure media diversity. This paper proposed a framework consisting of 8 indicators:

- Availability of sources: How many sources of news and opinion are available to Australians?
- Availability of journalists: How many journalists contribute to the production of local news?
- Number of owners: How many people exercise control over Australia's most influential sources of news?
- Range of topics: How much variety is present in Australia's news media market?
- Range of viewpoints: How many viewpoints are presented in Australia's news market?
- Local relevance: To what extent does local news cover matters of local significance?
- Consumption: What are the most consumed sources of news in Australia?
- Impact: What are the most impactful sources of news in Australia?

We also invited comments on relevant third-party data that could be used to inform reporting against the Framework, ideas for pilot projects and other implementation considerations.

We received 24 submissions from a range of media and industry associations, academia and non-government organisations. Submissions were highly informative and mostly supportive of enhanced measurement of media diversity in Australia. As part of our consultation process, we also ran 3 targeted workshops with industry and academic stakeholders, which also provided valuable insights and feedback.

We acknowledge the time, expertise and contributions of all those who provided input to the consultation process. We hope to continue building on these relationships as we build on the Framework, including via partnerships and other opportunities to collaborate on expanding and refining the Framework. We welcome approaches by organisations interested in engaging with this process. If you would like to get in touch, please email mdmftaskforce@acma.gov.au.

Summary of 2023 consultation findings and ACMA responses

Please note: while our 2023 report on the Framework included a summary of 2023 consultation findings and ACMA responses, we have updated the responses below to reflect subsequent minor changes to the parameters and sources of data applied in the 2024 Framework.

Stakeholders who participated in 2023 consultations generally supported the proposal to measure the Australian news market. However, there were diverging views about what to measure, and who should do different aspects of the work. Many stakeholders also identified significant gaps in the 2024 Framework, and raised concerns around the parameters, methodology and approach to data collection.

These submissions and the input provided over the 3 industry and academic workshops significantly informed the development of the 2024 Framework. However, we also acknowledge that many of the issues identified continue to present challenges and complexities that remain outside of the scope of the 2024 report. We intend to revisit these concerns and engage key stakeholders to consider ways of addressing them in future iterations of the Framework. For more information on future development of the Framework, see chapter 3.

Definition and scope of the news market

The original framework proposed examining all ‘professional’ sources of news and opinion, including digital news sites, podcasts and the social media presence of media outlets, but excluding sources of participatory journalism like personal blogs and community-run forums, and news from organisations without sufficient editorial independence, like advocacy groups. We also proposed excluding news sources that did not have a sufficiently strong link to Australia, as well as entertainment-oriented publications or programs where the predominant purpose is to entertain rather than inform, such as celebrity gossip, fashion or lifestyle news.

Submissions differed on how to define the news market and what news sources should be included within scope. Some, like submissions from Southern Cross Austereo, the Media, Entertainment and Arts Alliances (MEAA) and the Public Interest Journalism Initiative (PIJI), supported our original position to maintain a narrow definition of the market based on ‘professional’ or ‘core’ news sources. However, others, including the ABC, the News and Media Research Centre (N&MRC), the Centre for Media Transition (CMT), the Community Broadcasting Association of Australia (CBAA), First Nations Media Australia (FNMA), the Local and Independent News Association (LINA) and the Australian Muslim Advocacy Network (AMAN), called on the ACMA to consider a broader view of the news market. Reasoning for this broadly contested that an examination that did not include international media, online influencers, and/or community-driven or emergent forms of ‘non-professional’ journalism, would fail to capture the true state of media diversity in Australia or reflect changing news consumption patterns within Australia. In their submission, AMAN also noted the significant consumption of international news by diaspora communities in Australia.

The community broadcasting sector advocated for a broader definition of the market to reflect the important role played by those working in a volunteer or not-for-profit capacity, particularly in regional and rural areas, who contribute to the news environment but may not always have professional qualifications. The MEAA also advocated for freelance journalists to be included in any measure of the news workforce. Croakey Health Media noted that the Framework did not adequately account for source diversity, specifically the difference between various governance models, and cited the importance of business model diversity in promoting a more diverse and sustainable public journalism sector.

In their submission, FNMA highlighted the significance of First Nations media organisations as the primary providers of news and current affairs to Aboriginal and Torres Strait Islander peoples, as well the particular importance of capturing the diverse multidisciplinary nature of media work within the First Nations media sector. Within this context, FNMA noted the risk of some Indigenous media sources being excluded from the Framework’s current scope, where those sources operate on a community-owned, not-for-profit basis.

ACMA response

We consider that the Framework needs to be both manageable in scope and flexible enough to capture and monitor important trends in the supply and consumption of news and information.

Noting the complexities in defining scope, and current resourcing constraints, we have maintained an initial focus on 'professional' news, drawing on some of the criteria adopted in the News Media and Digital Platforms Mandatory Bargaining Code (The Bargaining Code), for the 2024 Framework. Specifically, the 2024 Framework incorporates the Bargaining Code's focus on:

- core news
- professional standards (noting however that the Framework also recognises relevant 'substantially equivalent' professional and editorial standards to those under the Bargaining Code)
- editorial independence
- operation predominantly in Australia
- public availability.

Certain eligibility criteria for the Bargaining Code, such as the Revenue Test, have not been incorporated into the 2024 Framework, meaning it does not differentiate between for-profit and not-for-profit news outlets that otherwise produce professional news.

Similarly, our focus on the news workforce is currently based on those contributing towards journalism at professional news outlets, due to the data currently available via the Australian Bureau of Statistics (ABS) Census.

However, as more evidence is collected over time about the sources of news and information most relied upon by Australians, the assessment can be expanded accordingly. We are committed to expanding our sources of data for indicator 2 (professional news workforce), and finding ways to capture those contributing to the production of professional news in other ways, such as in a volunteer capacity or via journalism-adjacent roles. We also hope to expand our consideration of source diversity and the governance structures of news organisations in future iterations of the Framework.

Treatment of news across different geographic scales

Many stakeholders welcomed the ACMA's emphasis on measuring localism on a standalone basis. There was also broad support for the proposed dimensions of localism (originality, connection and civic journalism) and for the corresponding shift away from assessing local news provision according to broadcast licence areas to local government areas (LGAs).

Some, like the Public Interest Journalism Initiative (PIJI) and Australians for a Murdoch Royal Commission (AFMRC), suggested more geographic granularity should be provided, including through the introduction of a 'community' scale that added a remoteness element to the assessment, or that focused on Commonwealth electoral divisions. Most stakeholders also rejected the ACMA's original proposal to restrict content sampling to LGAs with populations above 10,000 people, noting concerns around news deserts and the importance of building an understanding of what is happening to journalism in smaller, rural localities with populations below 10,000.

Commercial broadcasters largely disagreed with those calling for greater levels of geographic granularity in the Framework, arguing that as local content broadcasting rules are already tied to licence areas, an LGA-based assessment would be inefficient and too fine a measure for regulatory purposes. This builds on a broader argument made by the commercial broadcasting sector that the ACMA should closely adhere to the existing legislative definitions in the *Broadcasting Services Act 1992* (BSA), and that any new measurement activities or collection of data should be deferred until the scope, timing and methodology of the government's proposed 'wide-ranging review' of Australia's broadcasting legislation is known.

A common theme among stakeholders was that more work needs to be done to clearly define the concept of 'localism'. For instance, whether the focus should be on the local, physical presence of newsrooms, news 'generated locally', or stories about local areas that may be produced by larger national news outlets.

Finally, some stakeholders suggested that – while important – localism and geographic diversity shouldn't be the sole focus, particularly when assessing content diversity. Christian Media and Arts Australia (CMAA), for example, noted that other forms of news, including those that foster cultural and religious faith connections, exist across localities or are locality neutral. There was a strong push from several stakeholders for greater consideration of intersectionality and developing a better understanding of the news environment for, and reporting on, First Nations peoples, culturally and linguistically diverse communities, the LGBTIQ+ community, people of diverse faiths and people with disability.

ACMA response

The provision of local news is an important aspect of a diverse media landscape. The 2024 Framework captures the physical location of news outlets, as well as the geographic scale of news sources (based on their target audience and availability within LGAs) and their remoteness class. Importantly, no professional news sources or LGAs are excluded from the Framework based on their size.

However, localism is no longer a standalone area of examination under the Framework. While limited localism data is provided (and local news sources identified) via PIJI's data in indicator 4 (range and variety of news content), and issues relating to local news output are explored in case studies, a systematic review of the degree of localism within news content is not currently in scope. As with other parameters, this is an area in which the Framework may expand in future.

Examinations of ‘content diversity’

The original 2020 framework proposed identifying a sample of local news content and assessing the levels of content diversity based on 3 standalone indicators: range of topics, range of viewpoints and local relevance.

Stakeholders had mixed views about the use of the ‘hard’ and ‘soft’ news categories, whether the indicators should be given equal priority, and whether the assessment of content diversity was more appropriately conducted by third-party independent researchers.

Free TV Australia, for example, strongly rejected the idea of assessing content diversity via the Framework, arguing that the ACMA’s focus should be on the structures of the news media industry, and there was ‘no demonstrable reason’ for the ACMA to be measuring news output. Others, like the CMT, supported an examination of content diversity but suggested this work might be better undertaken by researchers independent of government. This view was shared by AFMRC, which suggested that academic institutions and organisations hold and analyse data instead of the ACMA.

The proposed examination into the ‘range of viewpoints’ was most contentious. While many of the submissions advocated for an examination of viewpoint diversity (the inclusion of/exposure to multiple perspectives or ideas), our proposed methodology of counting the number of quoted sources per article was broadly rejected as being too simplistic and imprecise. The Federal Member for Goldstein, Zoe Daniel MP, for example, called for the ACMA to embrace more qualitative measures. In their submission, Media Diversity Australia (MDA) noted the importance of including additional intersectional metrics that might support a more holistic measurement of viewpoint diversity, such as gender, cultural/ethnic background, disability, age, educational background, socio-economic background and geographic location.

ACMA response

Examining news content output is key to understanding whether a news outlet is delivering original reporting that is in the public interest and of relevance to its intended audience.

However, we accept that content analysis is resource intensive and can involve a level of subjectivity and judgement. As such, we have narrowed the focus and, at least initially, have only included third-party data examining content diversity based on the type and category of news produced by a select number of news outlets, and degree of localism (where relevant), rather than also seeking to assess relevance and range of viewpoints. This assessment of news topics and variety is intended to serve as a proxy for determining the volume of ‘civic’ or ‘public interest’ journalism being produced, without having to assess the actual content of individual articles.

Over time, automated classifiers could be used to undertake content analysis at scale, as well as consider qualitative news content assessments based on key diversity concerns. Some of these options are explored via a case study included in indicator 4 (range and variety of news content). There is also potential for the ACMA to be resourced to commission independent research and analysis from independent researchers.

Treatment of standpoint diversity

Standpoint diversity is the extent to which all people – but particularly those belonging to groups that are often underrepresented and/or marginalised – are both a part of, and represented by, the media environment. In essence, standpoint theory holds that experiencing the world as a person of a specific gender, cultural identity, age, socio-economic status or other lived experience impacts a person's knowledge and understanding.[185] It was originally excluded from the Framework based on the complexity of the research required but it was acknowledged that standpoint diversity was a factor that could be examined in later iterations of the Framework, subject to stakeholder views.

There was a strong response to the ACMA's proposal to exclude standpoint diversity, with several stakeholders recommending that it should be included in the Framework, or at least not be wholly out-of-scope. AFMRC, CBAA, LINA, Croakey Health Media, MDA and AMAN, among others all strongly supported an assessment of standpoint diversity from the Framework's inception. In their submission, FNMA highlighted the particular importance of measuring both workforce diversity and the representation and participation of First Nations people across Australian media, referencing a Lowitja Institute and FNMA paper that provides a number of recommendations for measuring, monitoring and strengthening First Nations representation in media. Their submission also noted the importance of ensuring the Framework is consistent with other Commonwealth Government policy instruments, such as *Closing the Gap*, elements of which could better inform indicators across the Framework.

Croakey Health Media's submission raised the significance of standpoint diversity for media diversity, public debate, democracy and the interests of those groups whose perspectives, or standpoints, are often inadequately reflected or represented in media coverage and governance structures.

ACMA response

Standpoint diversity is a crucial component of media diversity and vital in ensuring a robust, equitable and genuinely representative media sector. It is also a complex area of study that requires particular care and sensitivity. Due to current capacity constraints, standpoint diversity has not been included in this iteration of the Framework. However, we acknowledge it remains an important consideration for assessing media diversity and will aim to explore these issues in more depth in future iterations of the Framework. We also acknowledge that various stakeholders, including many of those who contributed to 2023 consultations, have specific expertise in these areas. Where possible, we hope to consult with and partner with these organisations to meaningfully engage with standpoint diversity in future.

While it is important to baseline and monitor changes, any measurement framework – much like the news market itself – needs to be adaptive and flexible to respond to changing market conditions, technological developments and shifting priorities. As part of any implementation work, periodic reviews of the Framework should be undertaken, with the expectation that the scope would grow over time to address outstanding data gaps.

185 A Thomas, A Jakubowicz and H Norman, *Does the media fail Aboriginal political aspirations? 45 years of news media reporting of key political moments*, Aboriginal Studies Press, 2020.

Appendix D: Media Diversity Measurement Framework monitoring and desktop research strategy

The objective of the Framework monitoring and desktop research strategy is to ensure that indicator 1 (groups, owners and controllers) and indicator 3 (professional news outlets) data remains accurate and up to date over the life of the Framework, by:

- tracking relevant changes to the Australian news market
- addressing gaps in existing data sources (where possible)
- obtaining new data to enable the addition of new data points
- validating existing data to ensure it remains accurate and up to date.

The pilot phase of the Framework monitoring and desktop research strategy commenced on 1 July 2024 and ended on 1 October 2024. Initial data collection and desktop research completed in this period informed a limited number of changes to the data underpinning the 2024 Framework. Additional data collected from industry groups (discussed below) and other sources will be properly examined during the full implementation of the strategy from 2025.

Inputs

The strategy draws on several ACMA and third-party inputs, including:

- existing indicator 1 and 3 data sources (see Appendix F: methodology below)
- desktop research
- internal ACMA market research
- relevant media reporting
- the ACMA annual consumer survey
- information from stakeholders, including members of the public (from 2025)
- industry data sources (discussed below).

We consulted with several industry groups in the second half of 2024 about the value of sharing information in support of current and future iterations of the Framework. That being, an accurate and up to date Framework has the potential to inform better policy and provide greater transparency for all stakeholders. Data provided also helps us to identify areas of potential expansion and greater inclusivity for future iterations of the Framework.

Several industry groups contributed data, including:

- Community Broadcasting Foundation
- Commercial Radio and Audio
- Digital Publishers Alliance
- Local and Independent News Association
- Queensland Country Press Association
- Victorian Country Press Association
- Community Broadcasting Association of Australia (CBAA) – outlined in *Case study 5* below.

Case study 5: Information provided by the CBAA to assist data validation

Data validation, as noted in chapter 6, is an important next step for us. This case study illustrates how information provided by an industry stakeholder, in this case the CBAA's provision of data about community broadcasters, may help us to improve our data.

Under the 2024 Framework, all community broadcasting and temporary community broadcasting licences on the Register of Radiocommunications Licences (RRL) have been included in our indicator 3 data. One of the requirements to be included under indicator 3 is the production, publication or broadcast of professional news (other parameters are discussed in chapter 3). However, the RRL does not include a blanket requirement[186] that all broadcasters produce core news (or an equivalent concept). This does not mean that they do not produce or broadcast news, only that most are not explicitly required to do so.

For instance, while community broadcasters are not explicitly required to broadcast news, broadcasting news may help a community broadcaster to meet their licence condition to represent their community interest. We also understand from a range of sources that many community broadcasters do choose to broadcast news. These sources include Case study 4 on Ngaarda Media in chapter 9, the Australian News Index (ANI) (which includes some community broadcasters) and the CBAA Community Radio Listener Survey. The survey found news is the top ranked reason for listening to community radio, with 49% of weekly listeners nominating news and information as their main reason for listening. In regional areas, this figure rises to more than 62%, and 66% in remote areas.[187]

The ACMA intends to verify for future iterations of the Framework that all community broadcasters and other outlets included in indicator 3 meet the 'core news' and other requirements. While inclusion on the ANI (or another data source with a core news or equivalent requirement) may be used to verify that some community broadcasters are meeting the core news requirement under the Framework, this still leaves a number of community broadcasters whose core news output we have been unable to verify.

Engaging with industry groups will form an important part of this verification process. In the case of community radio, the CBAA has already provided the ACMA with data on the news output of 323 community broadcasters (see collection methodology below). The data indicates that at least 251 community broadcasters broadcast news. The CBAA also collected information about the news service provider/s that these 251 broadcasters source their bulletins from. This allows us to observe that, where a particular news service provider is found to produce core news, all community broadcasters using that news service would also, by extension, meet the core news requirement of the Framework.

While the ACMA has chosen not to use this data to make changes to the 2024 Framework dataset, it is a valuable tool for determining which community broadcasters may require further assessment in future to verify their adherence to the core news requirement.

186 While local content rules under the *Broadcasting Services Act 1992* require some regional commercial radio and TV broadcasting licensees to broadcast local news and information, other broadcasters are not explicitly required to broadcast news.

187 Community Broadcasting Association of Australia, *Community Radio National Listener Survey Data*, CBAA, 2024, accessed 5 December 2024.

Methodology

The CBAA used an automated tool to monitor the internet streams of 310 community broadcasters for a one-month period, between 1 July and 1 August 2024. The automated tool used audio fingerprint recognition technology. The technology works by creating a unique ‘digital fingerprint’ for news bulletins. This ‘fingerprint’ is then identified and matched in real-time when broadcast. Where available, news service subscriber databases were also used to identify broadcasters with active subscriptions to news services. Some manual data evaluation by the CBAA was required to align information gathered from different sources.

This approach did have some limitations. Firstly, the CBAA did not monitor the streams of all community broadcasters in Australia. Secondly, this methodology has the potential to undercount, but not overcount, the number of news broadcasters. For example, in the case of one of the news service providers, the CBAA was unable to ‘fingerprint’ a full bulletin in advance of when it was aired, making its identification by the automated tool less reliable. The CBAA’s methodology also did not account for station outages or technical issues during the monitoring period, which may have prevented regular news bulletins from being played.

Due to these external factors, the CBAA recommended these results should be interpreted as a minimum count. The ACMA accepted this recommendation and, as a result, has not used the CBAA’s data to exclude any community broadcasters from the indicator 3 dataset.

Ngaarda Media was one of the community broadcasters identified by CBAA as broadcasting news. They are included in indicator 3 and case studied in chapter 9. Image source: Ngaarda Media.

Appendix E: multi-network controllers

Table 51 shows a list of 19 controllers that are known to be in a position to exercise control of 2 or more outlets across 2 or more networks identified under indicator 1 (groups, owners and controllers).

As noted in chapter 4, secondary networks formed on this basis are not represented in the interactive data reports.

Table 51: Multi-network controllers

Controller	Networks with one or more controlled outlets
Ace Radio Broadcasters Pty Limited	ACE Radio Nine Network
Andrew Bruce Gordon	Southern Cross Austereo WIN Network
Bruce Gordon	Southern Cross Austereo WIN Network
E.N.T. Enterprises Proprietary Limited	Southern Cross Austereo WIN Network
Ent Pty Limited	Southern Cross Austereo WIN Network
Ent Securities Proprietary Limited	Southern Cross Austereo WIN Network
Gotham City Properties Proprietary Limited	Southern Cross Austereo WIN Network
Grant Broadcasters Pty Ltd	Capital Radio Network Grant Broadcasters
Hoverton Pty Ltd	Southern Cross Austereo WIN Network
Janet Morrison Cameron	Capital Radio Network Grant Broadcasters
Judith Paterson	ACE Radio Nine Network
Lachlan Keith Murdoch	News Corp Australia Nova Network
Mydirectory Pty Limited	Southern Cross Austereo WIN Network
Rowland Woolcock Paterson	ACE Radio Nine Network
Win Corporation Pty Ltd	Southern Cross Austereo WIN Network

Win Television Network Pty Ltd	Southern Cross Austereo WIN Network
Win Television Nsw Pty Limited	Southern Cross Austereo WIN Network
Win Television Tas Pty Ltd	Southern Cross Austereo WIN Network
Wirrinourt Pty Ltd	ACE Radio Nine Network

Appendix F: methodology

The *News media in Australia: 2025 report* incorporates data from a range of sources to provide insights into news media diversity in Australia.

Key information about data sources, as well as limitations and gaps, is provided in the relevant chapter for each indicator.

Additional information on methodologies used for data collection, assessment, integration and analysis is outlined below.

Measuring source diversity

Indicators 1 to 3 of the Framework rely on a number of third-party and ACMA data sources. Links to these sources are provided below:

- The ACMA's Media Control Registers.
- The Register of Radiocommunications Licenses (RRL).
- The ACMA's register of eligible news businesses.
- Australian Bureau of Statistics (ABS) Census data.
- The Public interest Journalism Initiative's Australian News Index.
- The Framework monitoring and desktop research strategy (see Appendix D).

Data incorporation and use

Indicator 1 (groups, owners and controllers) and indicator 3 (professional news outlets) record several data fields about professional news outlets and their ownership and control.

If one or more of these data points differed across data sources, we used information from the sources we considered most suited to the needs of the Framework (that is, the RRL or media ownership and control registers). If these sources did not contain relevant data, the most recent data from the remaining sources was used. Sometimes we were unable to find up-to-date information for one or more data points in any available sources. Where this was the case, the Framework monitoring and desktop research strategy (outlined in Appendix D) was used to fill some gaps. However, as noted in chapters 4 and 6, several data gaps remain.

Indicator 1 (groups, owners and controllers)

Indicator 1 uses brand and network groups to explore the concentration of media ownership and control for news outlets both within and beyond the ACMA's regulatory focus.

The formation of networks

A network is formed when a group of professional news outlets, spanning at least 2 news brands, share at least one:

- owner (direct or parent)
- controller.

Networks may also be formed through a combination of shared ownership and control. For example, if several news outlets subject to media control rules share a controller, they are considered part of a network. If these outlets share an owner (or parent owner) with outlets for which we do not have control data, these outlets would also be added to the network.

Under the 2024 Framework, we assign an outlet to a single network based on the highest common denominator. For example, if several owner entities share a parent entity, a single network comprising all the outlets with that parent entity would be formed. Similarly, if several outlets with different groups of controllers share at least one common controller, a single network comprising all the outlets with that common controller would be formed.

However, some individuals and entities are in a position to exercise control of outlets that sit across more than one network formed on the above basis. We have identified 19 of these multi-network controllers using available control data (listed in Appendix E). While outlets with multi-network controllers may be considered to belong to a 'secondary network,' a more nuanced analysis of secondary networks is beyond the scope of the 2024 Framework.

The count and composition of networks identified under the 2024 Framework may also be affected by limitations of ownership and control data outlined below and in chapter 6.

Limitations of ownership data

The following limitations expand on the chapter 4 *Data limitations and gaps section:*

- The data sources used for indicator 1 did not contain ownership (or control) information for 18 news outlets (comprising 15 news brands). The Framework monitoring and desktop research strategy (see Appendix D) allowed us to identify who owned several of these outlets, but we were unable to determine who owned 10 remaining outlets (comprising 9 brands)[188]. As a result, these brands have not been assigned to any network and have been recorded as 'independent' by default.
- The 'news business corporation' recorded on the ACMA register of eligible news businesses provides some additional ownership data. The requirement under the News Media and Digital Platforms Mandatory Bargaining Code is that the news business corporation 'either by itself or together with other corporations, operates or controls the news business'. This means that the register may list either the outlet's direct or parent owner as the news business corporation, or one of the entities comprising a joint venture. As a result, some owners identified using the register may be either direct or parent owners and/or part of undisclosed joint ventures.
- PIJI identifies parent entities for 207 direct owners included in the ANI. These parent entities help us to group outlets together into networks based on common ownership. In the absence of more comprehensive control data (discussed further in chapter 4), parent entities represent some of the most useful data for identifying common ownership structures, which may not be clear from looking at outlets' direct owners alone. However, as noted, we do not have parent entity data for all direct owners.[189]

188 We were unable to determine who owned the following 9 news brands; Sunbury Life, The Spark, Central Coast Council Watch, Smoke Signals, The Rip (Queenscliff), Glenferrie Times, Tribune International, Bass Coast Post and The Rotunda.
189 Some outlets are directly owned by entities at the top of an ownership structure.

Indicator 2 (professional news workforce)

Indicator 2 provides an analysis of data collected via the Australian Census. The Census collects employment data for people aged 15 and above, recording their 'main job' in the previous week (the job in which they usually work the most hours), in addition to the industry and location of their employer.

As Census data is not confined to Australian citizens, it may include those working in news production for non-Australian news outlets (but who are based in Australia on Census night, when the data is collected). Conversely, because it only collects data on people in Australia on Census night, it does not capture Australian journalists based overseas, including those who may be working for an overseas bureau of an Australian news business.

In providing a count of the number of journalists in Australia, the 2024 Framework draws on data from the 'Journalists and Other Writers' category as defined by Australian and New Zealand Standard Classification of Occupations (ANZSCO) as of November 2024.

The category is further broken down into a series of subcategories:

- Copywriters
- Newspaper and Periodical Editors
- Print Journalists
- Radio Journalists
- Technical Writers
- Television Journalists
- Bloggers, Critics, Sports and Other Writers not elsewhere covered.

The 'Journalists and Other Writers not further defined' subcategory is used to refer to those whose employment is not defined beyond, but broadly fits into, the category of 'Journalists and Other Writers'.

As with the approach taken in similar analyses,[190] for the 2024 Framework, we have removed 'Copywriters' and 'Technical Writers' from data analysed, given these roles have traditionally sat outside the boundaries of what is considered 'journalism'. We have, however, retained those identified as 'not further defined', as those who identify as 'Journalists and Other Writers', without further specification, are more likely than not to be working in journalism roles. We have also retained those in the 'not elsewhere covered' category, due to the general correlation between tasks identified in this subcategory and tasks performed within the journalism field.

In October 2024, the ABS and Statistics New Zealand announced that each country would introduce their own tailored occupational statistical classifications. While committing to ongoing collaboration and comparability, the 2 agencies stated that changes in the labour markets in each country had produced a need for separate management of occupation classification. Australia's new classification came into effect on 6 December 2024 (OSCA – Occupation Standard Classification for Australia), including an update to the classification of the Journalists and Other Writers category. Given the ANZSCO classification was in place at the time of drafting, we have used this throughout the 2024 Framework.

Further information on this classification is provided on the ABS website.

190 See, for example, Park et al., 'Changing journalists occupations: An analysis of Australian Census 2021'.

Indicator 3 (professional news outlets)

Indicator 3 counts the number of Australian news outlets producing professional news. For these news outlets, we also look at their platform (and where applicable, broadcast service type) and geographic scale. This section focuses on the latter concept of geographic scale.

Geographic scale refers to the 4 related concepts of:

- primary state/territory
- LGAs covered
- scale of outlet coverage
- remoteness of outlet audience.

As noted in chapter 6, while we have elected not to publish data against 3 of these metrics, we have outlined the available methodologies below to illustrate the limitations that informed this decision.

Use of different methodologies

Available methodologies measure each of the geographic scale metrics at the news brand level, meaning the same data is recorded for each outlet within a shared brand group. In each case, the available methodology differs based on whether a given brand:

- has a radio and/or TV outlet
- does not have a radio and/or TV outlet.

This is because the ACMA has records of the geographic areas where radio and TV outlets are permitted to transmit a signal (that is, broadcast licence areas). These areas underpin the calculation of LGAs covered for brands that have a radio and/or TV outlet.

Brands that do not have a radio or TV outlet do not have broadcast licence areas, and as such, alternative methodologies are required to calculate LGAs covered, which itself is a limitation. Further limitations associated with each methodology are detailed below.

Primary state/territory

State/territory is determined differently for different outlets. However, for brands that cover part or all of 2 or more states or territories, all methodologies record a single, 'primary' state or territory (other than for 'Australia-wide' brands that cover the entire nation and do not have a primary state/territory assigned). The number of outlets recorded as covering each state or territory (in particular, 'other territories') is therefore likely to be an undercount.

Measurement approach for brands that ***do*** *have a radio or TV outlet*

The state or territory listed on the outlet's broadcast service licence (recorded in the RRL) is assigned to the brand. Some broadcast licences cover all or parts of more than one state or territory, however, a single state or territory is still listed on its licence. In these situations, we treat the state or territory listed on the licence as the brand's primary state/territory. For the SBS and ABC, who as previously noted, are not required to hold broadcast service licences, the primary state or territory is sourced from our internal file management system.

Measurement approach for brands that ***do not*** *have a radio or TV outlet*

If a brand:

- covers one entire state or territory (that is, state-wide), the state or territory is assigned
- covers an area smaller than an entire state or territory and its LGAs covered are:
  - all within one state or territory, that state or territory is assigned
  - in 2 or more states or territories, the state or territory listed for the brand in PIJI's ANI is assigned. We treat this as the brand's primary state or territory.

LGAs covered [191]

Each LGA is recorded as 'covered' by a news outlet when any part of it (including a single town or suburb) falls within the outlet's coverage area. As a result, both methodologies below have the potential to overestimate news coverage where outlets only cover part of an LGA.

Measurement approach for brands that ***do not*** *have a radio or TV outlet*

The names of LGAs covered are only recorded for brands that cover an area smaller than an entire state or territory. This reflects PIJI's approach and our understanding that these brands' professional news is most likely focused on specific LGAs.

To determine LGAs covered for applicable brands, we have relied on PIJI's point-in-time content assessment undertaken prior to their inclusion in the ANI.[192] PIJI notes errors may be introduced in instances where their assessment is not representative of news production or where changes to an outlet's coverage area occur over time.[193] However, PIJI considers this approach produces the strongest evidence of undersupply in the news market.[194]

For brands counted in indicator 3 that are not in PIJI's ANI, we intend to rely on self-declared target audience to determine LGAs covered (for example, target audience is often stated on the 'about' page of news websites). This approach is dependent on accurate and up to date information being provided by the brand and may therefore introduce errors where information provided is outdated or incorrect. However, this method would only be applicable to a small number of brands identified via the ACMA register of eligible news businesses.

Measurement approach for brands that ***do*** *have a radio or TV outlet*

Unlike the methodology outlined above, LGAs are determined for all except Australia-wide brands, including those that cover all or part of one or more states or territories.

For brands that cover an area smaller than the entire nation, all LGAs that overlap fully or partly with the broadcast licence area are recorded as covered. For example, the ALBANY RA1 broadcast licence area in WA overlaps with the Albany, Cranbrook, Denmark and Plantagenet LGAs. Any brand with an outlet that broadcasts to this broadcast licence area is therefore recorded as covering these 4 LGAs.

This methodology records LGAs covered for a greater range of outlets than the previous methodology because the boundaries of broadcast licence areas rarely align with the boundaries of states and territories. This makes it difficult to identify 'state-wide' brands, and therefore exclude them from having their LGAs covered recorded, on the basis that their professional news content is less likely to be focused on one or more specific LGAs.

191 As noted in chapter 6, while we have elected not to publish data against this metric, we have outlined the available methodologies below to illustrate the limitations that informed this decision.

192 Public Interest Journalism Initiative (PIJI), *Australian News Data Project*, PIJI website, n.d., accessed 29 October 2024.

193 Public Interest Journalism Initiative (PIJI), *Australian News Data Project.*

194 Public Interest Journalism Initiative (PIJI), *Australian News Data Project*.

For example, some broadcast licence areas, such as ‘Remote Central and Eastern Australia TV1’, cover part – but not all – of multiple states and territories. In this example, the broadcast licence covers most of the Northern Territory, Queensland and South Australia, as well as parts of Tasmania, Victoria and New South Wales.

However, narrowing the range of broadcast licence areas for which LGAs covered are recorded does not address the underlying issue with this methodology. That is, as PIJI also notes, the approach risks creating a perceived false equivalency between being *licensed* to broadcast in an area and *transmitting* a signal to that area.[195] PIJI also notes that transmitting a signal to an area does not guarantee that news is produced about that area. The approach is therefore more likely to reflect access to outlets (as opposed to their geographic focus).

In addition to the limitations outlined above, no information on LGAs covered was available for a significant portion of temporary community broadcasting licence holders.

Scale of outlet coverage

Our intended approach to measuring scale of outlet coverage is outlined in chapter 6.

Because scale of outlet coverage is calculated based on LGAs covered, the accuracy of this approach is dependent on the resolution of the methodological issues noted above.

Remoteness of outlet audience

Our intended approach to measure the remoteness of outlet audience is to assign a remoteness class to each outlet based on the remoteness class assigned by the ABS to the people within the outlet’s LGA(s) covered. While more than half of all LGAs have their population assigned to a single remoteness class, some contain 2 (or in some rare cases, more) areas with different remoteness classes. In these circumstances, we have used a weighted average to derive and assign a single remoteness class to the entire LGA. Similarly, where an outlet covers multiple LGAs with different remoteness classes, a weighted average will be used to assign a single remoteness class to the outlet. As with the assignment of a primary state/territory, the assignment of a primary remoteness class means the number of outlets recorded against some remoteness classes may be undercounted.

Because remoteness of outlet audience is calculated based on LGAs covered, the accuracy of this approach is dependent on the resolution of the methodological issues noted above.

195 Public Interest Journalism Initiative (PIJI), *Australian News Data Project.*

Measuring content diversity

The 2024 Framework draws exclusively on third-party data in its approach to measuring content diversity.

Indicator 4 (range and variety of news content)

Indicator 4 draws on PIJI's data regarding the content of professional news sources via the Australian News Sampling Project (ANSP), analysing:

- category or news topic
- number of 'public interest journalism' and 'other' articles, as a percentage of total news output
- percentage of local content
- percentage of original (as opposed to syndicated) content.

In our December 2023 report on the Framework, we indicated that part of the metric for indicator 4 would be the number of 'core and covered articles,[196] as a percentage of total news output'. However, as indicator 4 currently relies on third-party data from PIJI we have changed this language to refer to 'public interest journalism' and 'other', for consistency with PIJI's classification (as opposed to core and covered news). PIJI's definition of public interest journalism is similar, but not identical, to the definition of core news, and it is therefore likely that the application of a core news category to this data would produce similar results. For more information on the definition of public interest journalism, including how this differs from the definition of core news, see the *Parameters of the 2024 Framework* section of chapter 3.

Sampled stories assessed as containing public interest journalism are then allocated one to 4 topics, depending on the issues they cover. The 4 topics are:

- government
- courts and crime
- community
- public services.

Case studies released post-October 2022 indicate whether stories analysed are originally produced or syndicated content. Syndicated content may be syndicated from the same outlet, by another outlet of the same news brand, from a wire service, creative commons material, or content from other news websites. However, as noted by PIJI in their July 2023 Darwin and surrounds case study, the varying transparency of sampled outlets presents a limitation to the comparability of this data across outlets and, subsequently, case studies and states/territories:

> The ABC declares the origin of content published online, making it very easy to identify whether a story has been internally syndicated. Other news outlets are not all similarly transparent. This difference in transparency means that syndication data at the ABC is more robust than at other outlets.

This means that data provided may underestimate the amount of syndicated content appearing in each publication due to this lack of clarity. PIJI notes that this is particularly true for internally syndicated content, where outlets may not disclose the fact of republishing.

196 As defined in the News Media and Digital Platforms Mandatory Bargaining Code. For more information, see chapter 3.

Identification of public interest journalism

For the purposes of the Australian News Sampling Project, PIJI notes that stories are 'defined as containing public interest journalism if they are, on balance, focused on an issue relating to government, crime and courts, community individuals, events and sport, or other public services such as health and education'.[197] Stories are generally included for analysis (to determine levels of public interest journalism) if they appear to have broad news value, appear to be reported and are not promotional.

Stories that sit outside of these parameters (such as opinion or analysis pieces or those that are, or appear to be, advertising or press releases) are generally excluded from further analysis. Stories written by people who have an interest in the content of the story (for example, community members writing about a recent event held by their group, or an elected official about their achievements) are also excluded.

This approach to the inclusion and exclusion of stories is broadly aligned with the parameters of the 2024 Framework in chapter 3. More details of PIJI's approach to the inclusion and exclusion of stories is outlined in their various case study reports, for example the March 2023 case study on Adelaide Hills Council, SA.

It is important to note that, as for indicators 1 to 3 (source diversity), data collected under indicator 4 represents news that is produced within the 2024 Framework parameters, as outlined in chapter 3 (noting the distinction between core news and public interest journalism). Therefore, indicator 4 is not intended to represent a complete picture of news produced by or consumed by Australians. In addition to only analysing a small sample of news outlets in Australia, it also does not capture, for example, the various international sources consumed by Australians, including those potentially captured in indicators 5 and 6 (exposure diversity) of the 2024 Framework.

Sample size

As discussed in chapter 7, data for this indicator is based on news content sampled from approximately 123 news outlets (and no radio or television outlets), and approximately 20% of all LGAs. As a result, the selection of outlets analysed, and the regions they operate in, may not be representative of broader market trends and therefore, the data presented in indicator 4 is not intended to be a representative sample of news content across all platforms, or in all news markets across Australia.

While PIJI's website notes that the number of stories sampled for each outlet is the less of either 100 news stories or an entire month of content from selected outlets, a number of case studies (such as the April 2024 Greater Adelaide and July 2023 Darwin and surrounds case studies) include an increased sample size of at least 200 stories or 4 editions of a print newspaper. Where the minimum sample cannot be met, PIJI states that it reviews the entire month of content. Content sampled does not include radio and television broadcasts. While some ABC local website content is included, this is not necessarily representative of news content on ABC local radio.

197 Public Interest Journalism Initiative, 'Case study, April 2024: Greater Adelaide, SA', *Australian News Sampling Project*, June 2024, accessed 24 October 2024, 15.

Note on localism and local content

Our December 2023 report also noted our intention to include 'degree of localism' as a metric for this indicator. PIJI conceptualises localism to include both whether the story is local in nature – that is, affects a small and identifiable geographic community, such as a single town or LGA – and whether it is local specifically to the LGA being sampled, to a nearby LGA, or to a distant LGA. As an example, PIJI notes that an article about a community event in Brisbane that is published in a newspaper in Adelaide might be considered a local story in nature, but it is not local to a South Australian audience. More information on this methodology is available on PIJI's website.

By contrast, the percentage of local content published by each outlet simply considers whether stories published are local in nature, regardless of whether they are local to the area in which they are reported. PIJI assigns each story up to 3 (out of 4) possible story scales, to indicate whether the story concerns local issues, issues relevant to a wider region, an entire state or territory, and/or the country as a whole. PIJI also notes that while international and 'not applicable' options were available, these were not included in the data due to the very small number of stories that fall within these categories. While percentage of local content should not be understood as a measure of localism more broadly, it nonetheless provides a useful starting point in understanding the extent to which news outlets are providing news regarding local issues and events.

While PIJI's ANSP does report on localism, this has so far been applied in the context of individual case studies (assessing the extent to which outlets provide localised content to the LGAs included each case study). Due to the complexity involved in extracting and accurately representing this data (based on a number of factors, such as the inclusion of outlets that service additional LGAs outside of the case study in which the 'localism' of their stories is measured, therefore limiting the comparability of this data between outlets) we opted to limit the scope of this report to the simpler measure of percentage of local content.

Note on state and territory data

In extracting data from PIJI's case studies, we have categorised data into relevant states and territories. However, in 2 instances, case studies cover border regions that cross the NSW and Vic border (sampling outlets from Albury-Wodonga and the Sunraysia region). Data from these case studies has been attributed to the NSW and Vic border region and is highlighted as such in the *Analysis* section of chapter 7.

No stories were sampled form the ACT during the specified period.

Note on case study remoteness data

Under the ANSP, each case study generally focuses on a specific geographic area, ranging from one to several LGAs, with considerable variation in terms of remoteness and associated characteristics. To enable more meaningful analysis across geographic areas, we have assigned a remoteness class to each LGA based on the remoteness score assigned by the ABS to the people living in that LGA (see *'Remoteness of outlet audience'* above). While most case studies cover LGAs assigned to the same remoteness class, some contain LGAs with different remoteness classes. In this case, we have used a weighted average using LGA populations to derive and assign a single remoteness class to the entire case study.

The remoteness class assigned to each case study under this method is indicated below:

Case study	Remoteness class	Report date
City of Fremantle, WA	Major City	2022, November
Sunshine Coast Region, Qld	Major City	2023, February
Adelaide Hills Council, SA	Major City	2023, March
Inner Western Sydney, NSW	Major City	2023, April
Inner South Melbourne, Vic	Major City	2023, November
Greater Adelaide, SA	Major City	2024, April
Southern Grampians Shire, Vic	Inner Regional	2022, September
Bathurst Regional Council, NSW	Inner Regional	2022, October
Rural City of Murray Bridge, SA	Inner Regional	2022, October
Albury-Wodonga region, NSW & Vic	Inner Regional	2023, June
Coffs Harbour-Grafton region, NSW	Inner Regional	2024, February
Bunbury and surrounds, WA	Inner Regional	2024, March
Goulburn and surrounds, NSW	Inner Regional	2024, August
City of Burnie, Tas	Outer Regional	2022, November
Cairns Region and surrounds, Qld	Outer Regional	2023, March
Rural City of Horsham and West Wimmera Shire, Vic	Outer Regional	2023, March
Great Southern Region, WA	Outer Regional	2023, May
Darwin and surrounds, NT	Outer Regional	2023, July
Sunraysia region, NSW & Vic	Outer Regional	2023, September
East Gippsland and Wellington, Vic	Outer Regional	2024, June
North West, West Coast and Central Highlands, Tas	Outer Regional	2024, July
Maranoa Region, Qld	Remote	2022, September
Shire of Esperance, WA	Remote	2022, October
Eyre Peninsula, SA	Remote	2023, February
North West Queensland, Qld	Remote	2023, October
Bourke Shire Council, NSW	Very Remote	2022, November
King Island, Tas	Very Remote	2023, August

Feasibility of leveraging the ACMA's Bargaining Code content assessment process

In our December 2023 report, we noted the possibility of the 2024 Framework leveraging existing data from the Register of eligible news businesses for the Bargaining Code. Administered by the ACMA, it was initially thought that this data may provide additional information about content diversity (in particular, percentages of core and covered news) among eligible news businesses.

However, as per Section 52N of the *Competition and Consumer Act 2010*, the ACMA assesses outlets for registration to the Bargaining Code via a point-in-time assessment that deploys both qualitative and quantitative measures, considering the amount of core news content as well as the frequency and prominence of core news published by that business. While 50% core news production is generally considered adequate for meeting the 'primary purpose' requirement under the Bargaining Code, news businesses found to produce close to, but less than 50% core news at the time of assessment may still meet the eligibility requirements for registration to the Bargaining Code if the frequency of their core news publication, or the prominence it receives across the business' publications, is considered significant.

Other limitations with using the Bargaining Code's register as a source of data for assessing content diversity include its reliance on point-in-time assessment, the limitations of which are outlined earlier in this chapter. While the ACMA undertakes periodic reviews of outlets on the register, variable levels of core news publication (or alignment with other requirements for registration to the Bargaining Code, outlined in chapter 3), by a news business may not always be reflected in real time.

Similarly, requirements for and the voluntary nature of registration to the Bargaining Code mean that the register does not provide a holistic reflection of the news landscape in Australia. While more information on these formal requirements is provided in chapter 3, anecdotal evidence suggests that the time and resources required to undertake registration may preclude some smaller, under-resourced news businesses (for example, community-based outlets staffed by volunteers) from undertaking the process. Finally, it is worth noting that some larger news businesses, including the ABC, have not applied for registration to date.

For these reasons, the ACMA resolved not to incorporate data from the Bargaining Code's register of eligible news businesses into indicator 4 of the 2024 Framework.

Measuring exposure diversity

Indicators 5 and 6 draw on ACMA data from the ACMA annual consumer survey and data from the News and Media Research Centre's (N&MRC) Digital News Report. Aside from the annual consumer survey news module item listed below, all measurement details for Indicator 5 are included in the body of the chapter.

ACMA annual consumer survey news module

Indicators 5 and 6 both draw on ACMA data from our annual consumer survey, which was expanded in 2024 to support the objectives of the Framework and key trends in media research. The module includes questions examining access to a range of news platforms (for example, free-to-air TV, and social media), and outlets (for example, ABC news), and new questions covering the following broad areas:

- share of attention
- reliance on news sources
- pathways to news on social media.

Indicator 6 (trust and impact)

Share of attention calculation

The share of attention metric used in indicator 6 is based on Andrea Prat's share of attention model,[198] and is measured by recording the time spent by an individual on a specific news outlet as a share of their total engagement with all news outlets across a single platform. The ACMA annual consumer survey measures this by asking respondents for an estimate of time, in hours and minutes (in 15-minute increments), spent engaging with news content on each platform (for example, free-to-air TV, radio (AM/FM/DAB+), social media etc.), followed by a percentage estimate of the time on each platform spent accessing specific news outlets (for example, ABC News and Channel 7 News via free-to-air TV).[199]

For example, if an individual reports accessing news via free-to-air TV, the share of attention measure produces a relative breakdown of the amount of time they spent with each news outlet that they accessed on that platform (for example, Channel 7 News vs ABC News). This means that time spent on a news outlet is proportional to the total time spent on a specific platform. For example, Channel Seven's share of attention for someone who accessed free-to-air TV for 3 hours per week and spent 50% of that time watching Channel Seven, will be the same as someone who spent 50% of their time watching Channel Seven if they accessed free-to-air TV for 10 hours per week.

The output of this calculation is an overall score assigned to each outlet, resulting in a ranked list that can be used as a proxy measure for the impact or influence of a particular outlet over individuals, demographic groups and wider society.

Reliance data limitations

When measuring reliance in the ACMA annual consumer survey, some of the pre-set response options included in the key question relate more to platform use (for example, reliance on free-to-air TV) than they do to outlet use (for example, reliance on the ABC news channels on free-to-air TV).

For example, options such as 'it's easy to access', 'it's free to access' and 'I like the format' cannot be used to distinguish between outlets on the same platform in most cases. While there are exceptions to this, such as the existence of paid and free news websites/apps, analysis revealed that the reasons listed for the most relied on outlets on each platform were consistently the same reasons for all outlets aggregated on each platform. In other words, the reasons listed appear to relate to which platform consumers accessed, rather than the specific outlet. While this could simply mean that Australian adults tend to rely on certain news outlets based on platform preferences, we will consider whether the reasons for reliance question in our annual consumer survey should be revised in future to facilitate a more nuanced understanding of the reasons for reliance on individual news outlets.

198 See *Measuring and Protecting Media Plurality in the Digital Age: A Political Economy Approach*, Knight First Amendment Institute, accessed 1 October 2024.

199 This approach differs slightly to that taken by Ofcom, who ask respondents to select one of several frequency options (that is, once per week, 2 to 3 times per week etc.) instead of estimating time in hours and minutes. The ACMA believes that the latter approach provides a more precise estimate of attention share than a frequency-based approach, as it allows for more variation in responses.

Limited scope of impact measurement

Despite our emphasis on impact via consumption, some approaches reveal significant impact despite diminished reach or readership. The 2022 paper from the Lowitja Institute and First Nations Media Australia, *Closing the Gap and First Nations Peoples Representation in Media,* for example, discusses the impact of media representation on First Nations peoples and communities and the design of policies that directly impact them. Journalist and academic Amy McQuire has written extensively on the impact of media narratives on the experiences of Aboriginal and Torres Strait Islander peoples, and the policies that affect them, including the power of First Nations media to counter racist portrayals of First Nations people and promote justice and equity.[200] The Centre for Media Transition (CMT)'s Narrative Policy Framework focuses on the impact of narrative flows between metro and regional news sources on First Nations and regional communities, finding that the relationship between news media coverage and policymaking can significantly impact local interest groups.

In another example, noted in our 2020 *The future delivery of radio: Final report,* in circumstances, such as natural disasters and emergency situations, Australians may turn to news delivered via specific platforms, AM radio in particular, which may alter the impact of those platforms and the news that is delivered on them.

Use of the terms 'regional' and 'major city'

Digital News Report data is analysed against multiple demographics, including region. For region, the two categories used to classify respondents in the Digital News Report are 'regional' and 'major city'. As with indicator 3 (professional news outlets) and indicator 4 (range and variety of news content), these categories are based on the Australian Bureau of Statistics' approach to determining remoteness. However, in the Digital News Report, people who live in areas classed as inner regional, outer regional, remote or very remote are all counted under the 'regional' category.

The methodology used to allocate these categories to respondents differs to that used elsewhere in this report for calculating and assigning remoteness. In the Digital News Report, the respondent's postcode is used to determine their remoteness class, and thus their region category. Where a postcode contains more than one remoteness class, a single category (major city or regional) is assigned to the person based on the remoteness class of the greatest proportion of the population for that postcode.

Case studies (multiple indicators)

This report also included a number of case studies intended to support deepened analysis and, at times, articulate the limitations of the 2024 Framework, its parameters and sources of data.

To develop these case studies, we began by conducting desktop research and considering submissions made as part of the 2023 consultation on the Framework. Throughout 2024, we held follow-up meetings with several stakeholders and, in September 2024, held a series of roundtables with stakeholders who had previously engaged in the Framework and industry peaks with member networks. Importantly, discussions throughout 2024 provided us with a greater understanding of:

- the extent of the limitations of the 2024 Framework, its parameters and data sources
- potential case studies for inclusion in the 2024 report.

200 Amy McQuire, *Black Witness: The Power of Indigenous Media*, Queensland University Press, 2024.

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