

News in Australia: diversity and localism

Review of literature and research

Centre for Media Transition

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Centre for Media Transition

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The principal researchers on this report were Derek Wilding, Peter Fray, Chrisanthi Giotis, Sacha Molitorisz, Tim Koskie, Danielle Hynes, Jessica Xu and Andrew Jakubowicz. Rosa Alice provided administration and project management support.

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Written enquiries may be sent to:

Manager, Editorial Services
Australian Communications and Media Authority
PO Box 13112
Law Courts
Melbourne VIC 8010
Email: info@acma.gov.au

Introduction

This report was completed in March 2020 and has not been updated to reflect developments since this time, including those that have occurred due to the COVID-19 pandemic that was declared in March 2020. There have been significant shifts in the news landscape, consumption patterns and attitudes towards news – both in Australia and globally. These ongoing impacts have accelerated the evolution of news, including the impacts on the diversity and localism of news.

News is an important source of information for Australians and provides a key role in our democracy. However, changes in the media environment have been significant, changing the nature of news globally. In Australia, news is also evolving, as are consumer attitudes and consumption patterns.

Within this context, the Australian Communications and Media Authority (ACMA) announced in April 2019 that news would be one of its [compliance priorities in 2019–20](#). The ACMA undertook a work program to determine whether current community safeguards were delivering news and journalistic content that meets community expectations and supports an open, pluralistic democracy in Australia. It is focused on four key issues in relation to news: commercialisation, impartiality, diversity and localism.

As part of the ACMA research program 2019–20, the Centre for Media Transition (CMT) was commissioned to conduct a review of literature and research to provide a comprehensive understanding at that point in time of the media environment in relation to those four key issues.

The additional context of this work was the review of the ACMA that was conducted by the Department of Communications and the Arts (DoCA)¹ which identified several public interest policy objectives relating to news that continue to be relevant in a changing media environment. These include access to services and participation in society; diversity of voices; and values and safeguards that reflect community standards. The [final report](#) was published in May 2017. Complementary work was also undertaken by the Australian Competition and Consumer Commission (ACCC) as part of the [Digital Platforms Inquiry](#) (for which CMT provided a [separate, commissioned research report](#)).

Research task

The principal objective of the ACMA research task was to identify and analyse relevant evidence on Australian consumer use and attitudes to news and current affairs within the four topic areas of commercialisation, impartiality, diversity and localism. This report covers the topics of diversity and localism. The sections related to impartiality and commercialisation were published by the ACMA in January 2020, with related research and a discussion paper on those topics. These papers are on [the ACMA website](#).

¹ The functions that were previously the responsibility of the Department of Communications and the Arts have been transferred to the Department of Infrastructure, Transport, Regional Development and Communications as of 1 February 2020.

Specific research questions were provided in each of these topic areas as a guide to aspects of interest to the ACMA. These research questions are reproduced at the start of each chapter in this report.

A secondary objective was to locate relevant international research that considers Australian and (to the extent possible within the constraints identified below) international literature that would assist in understanding the issues identified by the ACMA.

The third dimension of the research task was to refer to relevant recent secondary material (for example, articles from academic literature) that reflects upon the consumer issues, or helps to explain aspects of the contemporary media environment relevant to those issues.

While the research task did not call for a comprehensive interpretation of the Australian and international research, the task was to identify and comment on gaps in the current literature, especially in relation to Australia, and to include additional information that does not specifically address the research questions but which might assist the ACMA in understanding the issues.

Methods and constraints

The project involved desk-based research only, with most of the work conducted in the period May to July 2019, and this report was finalised in March 2020.

The review was designed to be largely based on research published in the previous five years (i.e., 2014 to 2019), referencing older material where, for example, there was a key source of consumer research that had not been reproduced more recently. The review incorporates work published up to July 19, 2019. Hence the final report of the ACCC's Digital Platforms Inquiry is not incorporated; however, research commissioned by the Digital Platforms Inquiry is included. An exception occurs in the case of Centre for Media Transition research which was completed but not yet published at July 2019; this literature is included.

In broad terms, the literature review covers academic, policy and industry resources. The categories of literature comprise:

- Quantitative and qualitative primary consumer research
- Secondary consumer research and analysis
- Interpretive or analytical work that contains, or is based on, consumer research findings or data
- Critical commentary on the topics
- Industry data on consumer experience or behaviours.

The policy literature includes selected parliamentary inquiries, although given time constraints these were not assessed in a comprehensive way. Resources published by regulatory authorities in selected other jurisdictions were also reviewed (including the Federal Communications Commission in the US and Ofcom in the UK, and resources from New Zealand, Canada and the EU). With the international literature, the focus was on topics for which there was an absence of Australian research. The review did not include general literature such as autobiographical accounts by media industry

practitioners or interviews with stakeholders and the report does not include recommendations for regulatory change.

In relation to consumer survey results in particular, every effort has been made to ensure that data and any analysis of data presented in this report includes important notes about the data source to enable the reader to interpret findings appropriately. However, in some instances there are additional notes to better understand the data that should be referred to in the original source. Some notes on key sources referred to in this report are provided in the Appendix.

It should be noted that as the scope of the project is limited to news and current affairs, research on aspects of diversity and localism in, for example, feature films or television drama, is not included. Numerous ways of defining 'news' and 'current affairs' as well as 'journalism' are found in the academic literature and in legal and regulatory instruments. In addition, while 'news and current affairs' is the term generally used in the broadcast environment, 'news and comment' is often used in referring to print and online media. Discussions of the variations in meaning of these terms can be found in Chapter 1 of the research report commissioned by the ACCC and in section 6.1 of the ACCC's Final Report.

The project was completed in two stages. The first stage comprised the production of a bibliography of materials relating to the four topic areas. Search strategies were devised to cover both the academic and policy literature. This involved databases available from the UTS library (Academic Search Complete (EBSCO), INFORMIT, SAGE, ProQuest) as well as Google Scholar, along with searches of relevant websites (such as those of international regulators). The draft bibliography was supplied to the ACMA for comment, following which the research team reviewed the materials in the bibliography. When all the material was available, the researchers conducted a preliminary gaps analysis and provided a draft of the report to the ACMA for comment. The report was finalised by the CMT, taking account of the ACMA feedback.

Structure of this report

As with the first report on impartiality and commercialisation, the bulk of this report is arranged according to the specific topic areas supplied by the ACMA. Each of these chapters begins with a list of the specific research questions provided by the ACMA to scope the review of each topic. It is followed by a short set of bullet points summarising the key findings, followed by some important definitions. The chapters for the most part follow a common structure, providing information on practices, attitudes, concerns and research around managing that aspect via policy or regulation. The key findings at the start of both chapters are brought together to form the Executive Summary. In the Conclusion, the CMT provides some overall observations, principally related to the identified gaps in research. As noted above, the Appendix contains additional comments on the methodology used by some of the key consumer surveys.

Where there are observations or comments on the literature and research, they are those of the CMT and should not be taken to represent the views of the ACMA, its employees or the government.

Derek Wilding and Chrisanthi Giotis
Centre for Media Transition, December 2020

Executive summary

Overall context

This report addresses two specific topics of concern in the shifting news environment – diversity and localism. Some background points about the media environment in Australia help to establish the context for this review of the literature and research.

- Television news is still the most general source for Australian news consumers, with 66% saying they watch TV news and 42% saying it is their main source of news. This compares to 52% of news consumers using online news and 25% saying this is their main source. Results for other platforms are as follows: social media/blog is 46% for general news source and 18% for main news source; radio is 37% for general news source and 9% for main news source; newspaper is 28% for general news source and 6% for main news source (Fisher, Park, et al. 2019, pp. 26-7).
- Use of media type varies considerably by age, with the two main sources of news for the youngest group of news consumers (aged 18-21) being social media/blog (47%) and online news (24%), whereas the two main sources for the oldest group (aged 73+) are television (57%) and newspapers (19%) (Fisher, Park, et al. 2019, p. 27).
- Despite the movement of consumers and revenue from traditional to digital media, broadcasters and print publishers are prominent providers of news websites: in a list of the top 20 most used websites in 2017, only one provider (*BuzzFeed*) had no links to traditional media (Roy Morgan 2018d).
- More than half of Australian news consumers (52%) access news more than once a day and two thirds (66%) agree that news keeps them up to date (Fisher, Park, et al. 2019, pp. 25, 19).
- In terms of the media fulfilling its 'watchdog' role, only 44% of Australian news consumers agree that the news media monitors and scrutinises powerful people and businesses; however, attitudes vary with generation and with the type of news consumed. People who rely on social media – and tend to be younger – are less likely to agree (34%), whereas people who rely on newspapers – and tend to be older – are more likely to agree (59%) (Fisher, Park, et al. 2019, p. 57).
- It appears news literacy in Australia is quite low. One study found that only 51% of Australian news consumers 'understood that the ABC is free of advertising and funded by taxpayers'. This study also suggested that 'news consumers with higher literacy can distinguish humour from other types of fake news such as poor journalism, political spin and advertising' (Park et al. 2018, p. 48).

Diversity

- The overall state of media diversity in Australia has not yet been assessed, with consolidation of some traditional media sources being accompanied by availability of digital-only publications and enhanced access to international media.
- Recent research in Australia has shown that more news consumers are using multiple types of media, but gaps in the types of media they access are widening around the key demographic of age (Fisher, Park et al 2019). While traditional media remains an important platform and a source of online content, consumers now access sources through digital platforms to complement traditional media (Roy Morgan 2018b).
- There is little research on consumer attitudes to and concerns with media diversity in Australia, but a survey conducted in 2018 (Roy Morgan 2018a) shows high levels of agreement among Australian adults with the proposition that they have access to a sufficient range of diverse voices and of opinions in the news. It also found that Australians regard other aspects such as 'convenience' as more important than diversity.
- There is no comprehensive, evidence-based research that demonstrates levels of viewpoint diversity or how it might have changed with the introduction of digital media.
- One study in 2007 found that 69% of Australians agree with the proposition that media ownership is too concentrated (Jones & Pusey 2008), but there appears to be no research testing consumer views on ownership diversity in recent years.
- There appear to be mixed views on the question of consumers' attitudes to the tailoring of news feeds by digital platforms.
- There are risks for public policy in not giving greater attention to diversity in standpoints. In the final section of the Diversity chapter, Andrew Jakubowicz warns that alienation and the further movement of (for example) culturally diverse minority audiences from mainstream news services to online and social media threatens social cohesion.
- The conceptual framework developed by (Napoli 1999) to distinguish source diversity, content diversity and exposure diversity still has value. While availability of news (an aspect of source diversity) is enhanced through access to additional sources in the digital environment, exposure diversity may be restricted by the prominence of legacy news providers (see (Nielsen 2019); (Roy Morgan 2018d)) and by the ways in which algorithmic news delivery via digital platforms may narrow the range of sources consumers actually use (although the evidence is inconclusive).
- Currently, there is no overall framework for measuring media diversity developed internationally that would be appropriate for Australia. However, some specific tools developed in other jurisdictions (for example, Ofcom's 'share of references' mechanism) could offer a more sophisticated understanding of the relative significance of news media sources that audiences use.

Localism

- ACMA-commissioned research in 2013 and 2016 has found that local news is highly valued in regional Australia. There is also good evidence of the use of local news. While television is found to be the platform nominated by regional news consumers as their main source of news (46%) (Fisher, Park, et al. 2019, p. 26), local newspapers are found to be the most common source of local media in regional areas (ACMA 2013; ACMA 2017a, p. 10). A 2017 survey of Australian radio listeners also found that 76% of regional listeners agreed that radio was key to keeping up-to-date with community events (GfK 2017).
- Research shows that rural news consumers' access to regional and local newspapers is higher than the national average at 32% compared to 23% (Park et al. 2018, p. 54).
- A difference between the 2016 and 2013 ACMA research is the percentage of regional Australians who report having access to all the local content they want. In 2013 this proportion was 91%; in 2016 it had dropped to 78%. The reasons for this difference are unknown. Research does note that this was a period of heavy cutbacks and closures of commercial, public and community regional media (ACMA 2017a; Carson et al. 2016; Freeman, Hess & Waller 2017; O'Shea 2019; Simons et al. 2017; Zion et al. 2016). In regional TV news, ACMA reported an overall decline in viewership of weekday evening news services in 2006-2016 (ACMA 2017c, p. 7).
- Despite these changes in the environment, there has not been a comprehensive study of this changed mediascape and its impact on public interest local news (Simons et al. 2017, p. 1402). This is in contrast to the US where it has been said that there was a net loss of 1,800 local newspapers since 2004 (Abernathy 2018, p. 6) and in the UK, where the *Digital News Report 2019* highlights Press Gazette research showing the net closure of 245 local news titles in the last 13 years.
- Use of social media for local news is increasing: the biggest increase in usage (20%) between 2013 and 2016 in the ACMA consumer survey data was 'social media with local content'. This correlates to the data collected by the Centre for Media Transition, which found almost two in five regional news consumers gain local news from social media at least once a day. For more than two-thirds, it is at least once a week (Fray 2018, p. 2).
- The research marks out two specific functions of local news: contributing to community building and the local watchdog role. There have been several qualitative studies investigating both these roles. For example, in a study involving interviews and focus groups with readers of regional newspapers, Hess found that local newspapers consciously and unconsciously foster collective affinity to a specific geographic area for those who live there and beyond (2015, p. 486). Other regional case studies (Richards 2013; Bowd 2011; Meadows 2015; Nettlefold 2017, p. 293) emphasise the importance of regional media to local residents. One study gives mixed results on the use of local media in suburban Sydney (Muscat 2018). It has been found that many regional consumers nominate negativity as a problem with news media (Fisher, Park, et al. 2019, p. 115); it is possible this is a manifestation of the importance attributed to the community building role by regional audiences.
- Internationally, in the US Wenzel (2018) points out the community-building role of local media in an increasingly polarised US society while extensive, nationally

representative Pew Research from 2019 pointed out the community value ascribed to local news: 'those who say journalists are in touch with their community are 31 percentage points more likely to say their local media do a good job of dealing fairly with all sides – 73%, compared with 42% among those who say their media are out of touch' (Pew Research Center 2019, p. 6).

- The second type of local news – watchdog news – is the subject of research that questions the performance of local media in recent years (Simons & Dickson 2019). This study involving respondents in council media departments found that almost a third of councils report that no journalists attend local government meetings. A separate, qualitative case-study analysis (Carson et al. 2016, p. 137) found that civic leaders' contact with journalists and use of the media for public engagement had diminished over time.
- There is evidence that hyperlocal media is emerging around the country. This includes examples from the case studies in ACMA's research (ACMA 2017a). Offline and online hyperlocals have focused on community cohesion. It has been observed that 'There is no doubt that while human interest news has a future in rural communities, hard news reporting and the future of newspapers are at risk while these sources are viable for human interest stories (O'Shea 2019, p. 59).
- In terms of what counts as 'local', ACMA's research between 2013 and 2016 found that there was a significant increase in people defining 'local' as their region, compared to 2013 when most people defined local as their town. It has been said that one of the ways in which regional media has adapted to the current environment is by merging services (Bowd et al. 2017; Simons et al. 2017; Zion et al. 2016), and that newspapers aimed at specific rural and regional towns and cities are now filling their pages with syndicated and shared copy.

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1 Diversity

1.1 The research questions

- Have recent changes (since the rise of digital media) in the media environment had an impact on the diversity of news Australians receive? On what aspects: e.g. diversity in perspectives/opinions both within and across sources, diversity in ownership, diversity of sources available, balance in coverage, or the range of content covered? How does this vary by location (metro, regional, remote)?
- What do consumers understand by the concept of diversity or plurality in news and opinion? How important is it to them and what importance do they place on different aspects of diversity? E.g. diversity in perspectives/opinions both within and across sources, diversity in ownership, diversity of sources available, balance in coverage, or the range of content covered.
- Are consumers satisfied with current levels of diversity in news?
- To what extent do Australians believe the ownership of news sources affects the diversity of news and opinion offered by that source?
- When considering and measuring diversity of sources, what types of news, current affairs and opinion do consumers see as important?

1.2 Key findings

While there is some Australian research on availability of diverse media sources, only rare studies and reports consider the audience's attitudes toward and satisfaction with the diversity of news media. Some international research provides additional insights.

- The overall state of media diversity in Australia has not yet been assessed, with consolidation of some traditional media sources being accompanied by availability of digital-only publications and enhanced access to international media.
- Recent research in Australia has shown that more news consumers are using multiple types of media, but gaps in the types of media they access are widening around the key demographic of age (Fisher, Park et al 2019). While traditional media remains an important platform and a source of online content, consumers now access sources through digital platforms to complement traditional media (Roy Morgan 2018b).
- There is little research on consumer attitudes to and concerns with media diversity in Australia, but a survey conducted in 2018 (Roy Morgan 2018a) shows high levels of agreement among Australian adults with the proposition that they have access to a sufficient range of diverse voices and of opinions in the news. It also found that Australians regard other aspects such as 'convenience' as more important than diversity.
- There is no comprehensive, evidence-based research that demonstrates levels of viewpoint diversity or how it might have changed with the introduction of digital media.
- One study in 2007 found that 69% of Australians agree with the proposition that media ownership is too concentrated (Jones & Pusey 2008), but there appears to be no research testing consumer views on ownership diversity in recent years.
- There appear to be mixed views on the question of consumers' attitudes to the tailoring of news feeds by digital platforms.
- There are risks for public policy in not giving greater attention to diversity in standpoints. In the final section of this chapter, Andrew Jakubowicz warns that alienation and the further movement of (for example) culturally diverse minority audiences from mainstream news services to online and social media threatens social cohesion.
- The conceptual framework developed by (Napoli 1999) to distinguish source diversity, content diversity and exposure diversity still has value. While availability of news (an aspect of source diversity) is enhanced through access to additional sources in the digital environment, exposure diversity may be restricted by the prominence of legacy news providers (see (Nielsen 2019); (Roy Morgan 2018d)) and by the ways in which algorithmic news delivery via digital platforms may narrow the range of sources consumers actually use (although the evidence is inconclusive).
- Currently, there is no overall framework for measuring media diversity developed internationally that would be appropriate for Australia. However, some specific tools developed in other jurisdictions (for example, Ofcom's 'share of references' mechanism) could offer a more sophisticated understanding of the relative significance of news media sources that audiences use.

1.3 Definitions

Unlike other chapters in this report which present definitions for several key terms, this chapter requires an explanation of the various dimensions of the one central concept of ‘**media diversity**’ and its two variants, ‘media pluralism’ and ‘media plurality’.

1.3.1 Variations on ‘media diversity’, ‘media pluralism’ and ‘media plurality’

Various types of media diversity have been identified, and these are sometimes confused in the academic literature. They include source diversity, ownership diversity, diversity of media types, and content diversity. These are not exhaustive: the academic literature goes even further in diffusing the concept. The types of diversity listed above are the primary focus of this chapter, with a particular focus on source diversity.

As noted by leading media diversity scholar Philip Napoli (1999), diversity has been an enduring goal of communications policy and research with no enduring definition of the concept or consistently employed system of measurement. As Figure 1.1 shows, he breaks diversity down into three categories – **source diversity**, **content diversity**, and **exposure diversity** – each with its own several subcomponents.

Figure 1.1: Napoli (1999) diversity components, subcomponents and assumed relationships

Source Diversity	Content Diversity	Exposure Diversity
1. Ownership	1. Program-Type Format	1. Horizontal
a. Programming	2. Demographic	2. Vertical
b. Outlet	3. Idea/Viewpoint	
2. Workforce		

Source: (Napoli, 1999), p10).

This has provided a valuable starting point for studies of diversity and fruitful debate. Some analysts and academics, like the EU’s Centre for Media Pluralism and Freedom further break down the subcomponents into more specific categories including elements of representation and social inclusion, using the terms ‘pluralism’ to embrace a wide range of factor including, for example, access to media by people with disabilities. Others, most notably Kari Karppinen (2007, p. 23), suggest a reorientation of the terms and measurements towards an ideologically-rooted concept of media pluralism, focusing on presenting antagonistic viewpoints that disrupt disproportionate concentrations of communicative power. While ‘pluralism’ and ‘diversity’ are often used synonymously, Karppinen (2018, p. 494) suggests that there is a significant distinction: *diversity* is a descriptive term for the variety of structures and content of a media system, where *pluralism* emphasises this ideological normative goal.

This is a useful distinction because it separates aspects that are historically the concern of public policy and regulation in Australia (the structures and content of a media system)

from those that are more likely the subject of academic thought (disrupting 'disproportionate concentrations of communications power'). Accordingly, in this report Karppinen's characterisation of diversity is adopted as the guiding term; some dimensions as proposed by Philip Napoli are explained below. However, three brief observations on alternative approaches can be made.

- (i) In UK legislation and in the work of Ofcom the term 'plurality' is used instead of 'diversity' (see, for example, Ofcom (2015, p. 1)). This can be seen as similar in scope to the 'structures and content' that are part of Karppinen's concept of 'diversity', used in this report.
- (ii) Some scholars prefer the term 'diversity' to describe aspects of content and viewpoint, leaving 'pluralism' to describe the structural aspects (see for example, Hitchens (2006, p. 8)). This approach is in fact very helpful for a more detailed analysis of the subject, but will not be used here in order to maintain clarity in this chapter which focuses mostly on consumer attitudes and practices.
- (iii) While the approach adopted here is designed to be relevant to the Australian policy and regulatory context, the aspects of 'communicative power' discussed by Karppinen should not be dismissed. The exercise of power is implicit in the exploration of standpoint diversity in section 1.9 below, where Andrew Jakubowicz explains how access to different types of media outlets on the part of marginalised groups adds to overall media diversity. In addition, Ofcom's approach to measuring media plurality explicitly recognises the accumulation of political power that can result from concentration of media ownership.

Returning to the dimensions of 'diversity' as characterised by Karppinen, in dealing with these varying components of diversity and applying them to the contemporary media environment in Australia, it is useful to apply the Napoli (1999) three-part scheme for **source diversity**, **content diversity** and **exposure diversity**, but to allow for some variation in the subcomponents.

1.3.2 Source diversity

A convenient way for thinking about source diversity is to regard it as covering 'structural' elements associated with the various segments of the industry (such as the division between commercial, public service and community broadcasters) and the ways in which media sources are owned and controlled. Napoli's concept of source diversity embraces program supply, which is structural in one sense but is also related to content diversity, as well as workforce characteristics, which proves useful in considering the impact of cut-backs in newsrooms, even if it is not something expected to be seen in Australian media policy.

A variation to source diversity is to recognise **diversity of media types**, as defined by Gálik & Vogl (2015). For them, **media type diversity** covers:

...the co-existence of media with different mandates and sources of financing, notably commercial media, community or alternative media, and public service media, within and across media sectors, like print, television, radio and Internet (p. 67).

Hitchens (2006, p.8) also identifies media type as an aspect of structural regulation, as opposed to content regulation. While a broad framework, media type offers a measure of

the diversity of the digital platforms, community radio, TV, or the other multitude of channels and systems audiences use to access media content.

Ownership – a part of Napoli’s scheme – is still an important aspect of **source diversity**, if only because, along with the structural rules that designate categories of broadcasting service, it is one of the few aspects subject to regulation in Australia. But the importance of ownership can be difficult to assess in environments where content is shared across separately-owned media groups. In addition, share portfolios of some media companies are themselves diverse, featuring a multitude of institutional investors. While it is still possible to apply a regulatory ‘control’ test, the absence of prominent influential ‘owners’ means that audience views on ownership need to take account of the limited information audiences are likely to have on these arrangements. In this report then, **source diversity** will often refer specifically to the variety of outlets audiences use rather than the owners themselves. However, audience views on **ownership diversity** are considered where available.

On the role of ownership itself, while Tim Dwyer calls policies targeting concentrations of ownership the ‘gold standard’ for ensuring media diversity (Dwyer 2019, p.249), Valcke, Picard & Sükösd (2015, p. 2) assert that diversity of ownership is neither sufficient nor necessary for pluralistic media. In the CMT report for the ACCC’s Digital Platforms Inquiry, a further variation on the approach to media ownership in the contemporary environment was expressed:

Media ownership is still a relevant, although insufficient element, in protecting media plurality. Despite the advent of streaming and catch-up services, at least while broadcast television figures strongly in the Australian media environment, the three-licence ‘moratorium’ and the accompanying concentration (‘one-to-market’) rule are effective mechanisms for promoting at least three core newsgathering networks. It may be that a fully developed power to consider media plurality and take action where needed, coupled with these existing concentration provisions, could replace the existing points scheme for ‘media diversity’ in the Broadcasting Services Act (Wilding et al 2018, p.146).

1.3.3 Content diversity

The concept of **content diversity** has a large purview. Where Carpenter (2010, p. 1065) takes it to include both topic diversity, multi-modality, and the inclusion of hyperlinks to more content, Möller et al. (2018, p. 963) notes that content diversity is often understood as the presence and prevalence of counter-ideological and counter-attitudinal content. For Van Cuilenburg (1999, p. 188), it is an analysis of the general heterogeneity of media content as it aligns to a specified characteristic, which he asserts is the most practical measurement of media diversity. To allow more pointed analysis of **content diversity** here, this report specifically focuses on the **diversity of voices and perspectives** in that content. **Diversity of media genre**, exploring formats and issues, is then explored separately.

One variation to content diversity as it characterised in Napoli’s table is to allow for the concept of ‘**standpoint diversity**’, similar to idea/viewpoint, but with an expanded scope that covers both source and content. Andrew Jakubowicz contributes to this chapter by elaborating on the state of **standpoint diversity** in Australia and (to a lesser extent) abroad, with subsections on culture, indigeneity, gender, sexual orientation and disability. This term measures the extent to which diverse and often marginalised groups

are allowed not only to have a voice in the public debate but also allowed to make a substantial contribution and have that contribution recognised.

1.3.4 Exposure diversity

A crucial and frequently missing link for understanding media diversity is that users do not see all of the media that is available. To accommodate this, a growing body of research focuses on **Exposure Diversity**. According to Helberger (2018, p. 158), exposure diversity concerns 'the question of how diverse the selection of content and speakers is that users are ultimately exposed to and consume.' Citing Napoli (1999), Helberger notes that an increase in the supply of diversity can actually reduce the consumption of diverse media, as consumers are forced to filter and select in the face of overabundance. Further, Roessler (2007, p. 481) notes that high levels of media diversity that is not accompanied by diverse media consumption could lead to a more fragmented and dysfunctional public. However, according to Napoli (2011, p. 247), exposure diversity does not stand alone but rather represents one end of the chain of media diversity. As much as it is a concern in itself, it is also dependent on the presence of diverse media content, which is the product of sources that have impactful owners, with each link in the chain playing a fundamental role in media diversity.

Consistent methods for measuring exposure diversity are still under development, but cover a few key concerns. Historically, exposure diversity has been analysed through rates of consumption, often collected by firms such as Roy Morgan or Nielsen Media Research through surveys or usage data. However, according to van der Wurff (2011, p. 329), this kind of data can omit how much diversity is received by the public, which he measures as 'diversity received', focusing his research specifically on the diversity each individual has consumed. Consequently, Ofcom takes a broader approach to consider not only factors like reach and share of consumption of media, but also its impact in terms of personal importance for consumers and the attributes consumers apply to the information and its source (Ofcom 2015, p. 5). Conversely, Napoli (2011, p. 251) highlights the importance of being aware of consumers' media choices in determining the extent of their exposure diversity, given the role their media habits play in accessing diverse media. Each of these offers a piece of the larger puzzle for describing levels of exposure diversity.

1.3.5 Conceptual framework for discussion of media diversity in Australia

In Figure 1.2 below, Napoli's framework that separates source diversity, content diversity and exposure diversity is adapted to accommodate aspects of the Australian industry, policy and regulatory environment, as well as approaches that have emerged in more recent academic research. This is not intended as a comprehensive typology of media diversity; it is simply provided to help guide the discussion of diversity in the review of literature that follows.

Figure 1.2 Media diversity descriptors

Source Diversity	Content Diversity	Exposure Diversity
Media type Commercial television, community radio etc	Viewpoint diversity	Rates of consumption
Ownership and control	Diversity of information	Consumption behaviours
Program supply		Media impacts
Standpoint diversity		

1.4 Diversity in practice – the media environment

1.4.1 Changes in the media environment

Australia

Changes in the state of media diversity in Australia since the rise of digital media are not easy to measure because there is no regular auditing of the media landscape and there are no benchmark studies against which new developments can be assessed. Among the resources available are:

- the ACMA's ownership control registers and reports, and its 'media interests snapshots' and the high-level analysis of changes offered in its annual Communications Report (see <https://www.acma.gov.au/Industry/Broadcast/Media-ownership-and-control> and ACMA (2019) section 1.3);
- publications by the Department of Communications and the Arts (e.g. the 2015 policy background paper (Department of Communications and the Arts 2015));
- reports by and submissions to Parliamentary inquiries (e.g. the inquiry into the Broadcasting Legislation Amendment (Media Reform Bill) 2016, see Environment and Communications Legislation Committee (2016));
- case-by-case analysis of the implications of merger proposal issued by the ACCC (see, for example, its assessment of the market when deciding in 2016 not to oppose the acquisition by Seven West Media of *The Sunday Times* from News Limited, <https://www.accc.gov.au/public-registers/mergers-registers/public-informal-merger-reviews/seven-west-media-limited-proposed-acquisition-of-the-sunday-times-publication-and-website-from-news-limited>);
- commentary by academics on changes in policy and media ownership laws or on the state of media diversity (with the most thorough of these being the chapter on Australia prepared by Rod Tiffen and Franco Papandrea (2016) for the international collection, *Who Owns the World's Media?* (Noam 2016));
- data on ratings, circulation and subscribers which helps provide a picture of the most commonly accessed media sources, such as the Roy Morgan (2018d) report on the most used news websites.

Some of these sources are necessarily time and context dependent. The ACMA reports and registers, while the most authoritative sources on ownership and control, are limited in the scope set by legislation as they only cover commercial television, commercial radio and associated newspapers. These resources usually only cover aspects of source diversity.

Although the reference material on this topic is limited and does not offer a comprehensive view of the media environment in Australia, some observations can be made.

Online media *has* contributed to media diversity, though its contribution has not been in the form of the remedy that had been proposed at its advent (Senate Select Committee on the Future of Public Interest Journalism 2018, p. 23). The development of digital platforms, particularly social media platforms, has seen the creation of a new news genre: 'social news' (Hurcombe, Burgess & Harrington 2018), whereby journalists report on social media discussions and surface interesting or entertaining posts. User media production has been appended to other genres of news, as well, in the form of comment sections (Martin 2015), which appear on several of the most popular Australian news websites (Roy Morgan 2018d) and add to content diversity. Video-on-demand gives not only new forms of access to video content, through services like Netflix, but also new sources, genres, and content on digital platforms such as YouTube (Given 2016) – which Fisher, Park, et al. (2019, p. 97) note is a growing source of news. New forms of active media use, such as news sharing, further diversify exposure to media sources (Dwyer & Martin 2017). These developments can be overstated. The increase in video-on-demand is not threatening to replace television, for instance, as it leaves completely untouched many of its functions (Given 2016, p. 110). But they do change the picture of what media diversity looks like in the modern context.

In general, it appears that the rise of digital media has not improved diversity of the ownership of the media consumed and available. It has improved access to overseas publications and channels and, in some cases, spawned new local initiatives. But it has done little for ownership per se – at least in terms of the overall numbers of different owners. Where Australia has had some of the most concentrated media ownership for some time (Dwyer 2016), media ownership has become more concentrated over recent years. While some of this activity might be described as organic business expansion (e.g., the acquisition by News Corp Australia of the APN print holdings), some notable mergers have resulted directly from the liberalisation or removal of media ownership laws, first in 2006 and again in 2017 (Department of Communications and the Arts 2015; Senate Select Committee on the Future of Public Interest Journalism 2018). Examples include the formation of Southern Cross Australia as a controller of both regional radio and regional television assets, and the recent pairing of the Fairfax Media print and radio assets with the Nine Network. A large part of the rationale for legislative change, along with reasons cited by firms for the resulting transactions, has been the rise of digital media and, in particular, competition from overseas media and from the aggregation and distribution roles now performed by digital platforms (see, for example, Parliament of the Commonwealth of Australia - House of Representatives (2016, pp. 8-14)). Industry developments have not established this change was positive for media diversity, although the recent carving-off of the regional and community section of the Fairfax stable (over 160 regional and local newspapers) to the consortium controlled by

businessman Antony Catalano has created an additional ownership group in Australian media.

Academic researchers have also noted that while online media theoretically provides access to media owned by a larger variety of parties, digital media has not overturned old patterns of use (Dwyer, Martin & Goggin 2011, p. 65.3) and offline legacy media organisations mostly dominate online news media consumption as well (Fisher, Park, et al. 2019, p. 31). Curran et al. (2013, p. 891) also found that online media has reinforced diversity concerns rather than ameliorated them, with the established legacy outlets having moved on to also dominate the online space.

Recent data from Nielsen (Nielsen 2019) (see Figure 1.3 below)² shows that legacy news media organisations dominate Australian online news consumption. While News.com.au itself is the most visited news site, News Corp Australia sites dominate the top 20, which includes The Daily Telegraph, Herald Sun, The Australian, APN Australian Regional Media - News Network, and couriermail.com.au. Nine Entertainment sites, nine.com.au and smh.com.au, hold two of the top spots, and the Age website is in the list, as is Australian Community Media Network, which was owned by Nine Entertainment until only recently. These two groups, in conjunction with ABC News Websites, indicate not only that legacy media organisations dominate online news, but also the extent to which they dominate, with even newly-available news content from BBC, The Guardian and The Daily Mail Australia being legacy news organisations from the UK. Nevertheless, the internet has enhanced access to these international legacy organisations' content, which have subsequently increased their Australian presence.

Figure 1.3 Top 20 most visited news websites for Australia

1st May 2018 to 30th April 2019

Rank	Name	Average per month
1	news.com.au	9,097,580
2	ABC News Websites	7,926,259
3	nine.com.au	7,900,634
4	smh.com.au	5,758,167
5	Apple News	5,452,271
6	Daily Mail Australia	5,396,362
7	Yahoo!	3,975,780
8	The Guardian	3,865,497
9	Buzzfeed Network	2,965,107
10	Australian Community Media Network	2,715,779
11	The Age	2,708,920
12	The Daily Telegraph	2,503,919
13	BBC	2,480,838
14	Herald Sun	2,384,174
15	THE AUSTRALIAN	1,955,673
16	The West Australian	1,944,884
17	APN Australian Regional Media - News Network	1,928,364
18	couriermail.com.au	1,755,289
19	perthnow	1,706,704
20	MSN News	1,683,974

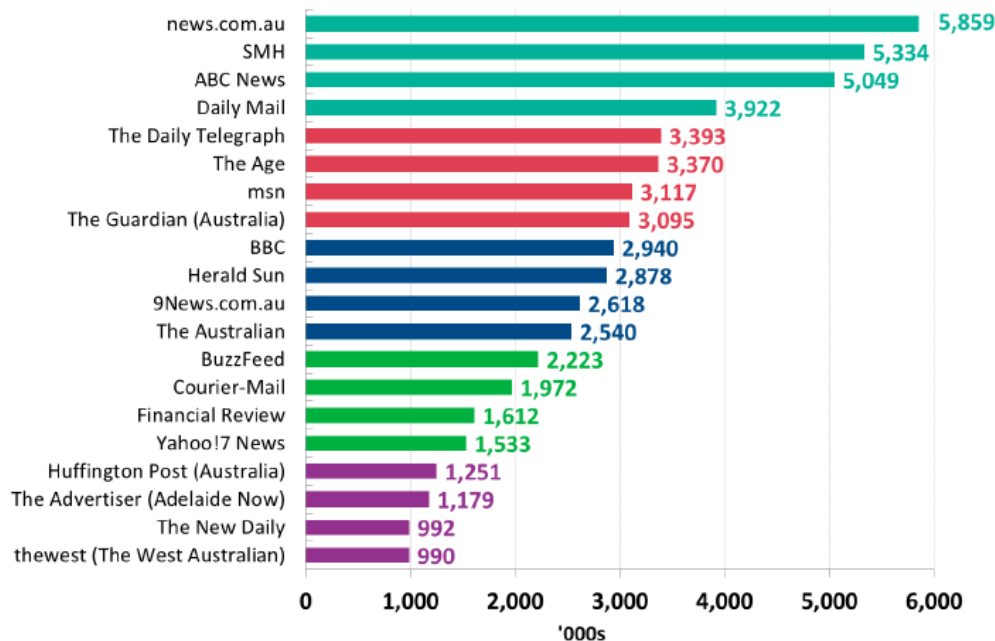
Source: (Nielsen 2019)

² This information was supplied by the ACMA for the purposes of this research only and not for publication. It should not be reproduced without permission from Nielsen.

Only four digital native news organisations – Apple News, Yahoo!, BuzzFeed Network and MSN – appear in the list, but these entries are themselves entwined with legacy media. Yahoo! only recently split with Seven West Media in March of 2018, whose new website is likely not fully represented in this list due to age.

MSN News, the last entry in this list was ranked 7th the year before when Roy Morgan published the Top 20 News sites in 2018 (see Figure 1.4) (Roy Morgan 2018d).³ MSN News separated from Nine Entertainment in 2016, potentially predicting a trend for Yahoo!. As Apple News is actually an app-based news aggregator rather than a news organisation, the only digital native news organisation with no ties to legacy media in this list is BuzzFeed Network. This suggests that online media’s contribution to source and ownership diversity is limited and mostly through providing access to international legacy news organisations.

Figure 1.4 Roy Morgan 2018 most used news websites



Source: Roy Morgan Single Source: April 2017 – March 2018, n = 50,014 Australians aged 14+.

Source: (Roy Morgan 2018d, p. online)

While Nielsen data run by the ACMA (Nielsen 2019) yields significant insights, a potentially crucial point is what it does *not* show. While Apple News is listed as a top news website, the *Digital News Report* for Australia for 2019 (Fisher, Park, et al. 2019, p. 30) found more Australian news consumers report using Google News (10% versus 14%). Further, this 2019 edition of the *Digital News Report* (Fisher, Park, et al. 2019, p. 95) reveals large numbers of people obtaining news from sources like YouTube (19% -

³ The Nielsen and Roy Morgan results should not be directly compared. Apart from the different timeframes, there are important differences in the methodology, including the age of participants and the fact that Roy Morgan is based on recall of survey respondents, whereas Nielsen uses a hybrid method involving actual tracking of sites visited. In addition, the Nielsen list collates various mastheads in Australian Community Media Network and in APN Australian Regional Media – News Network.

up 11% from two years before); these are sources for original news content, yet their usage rates are not compared to other sources (Nielsen 2019; Roy Morgan 2018d).

Aside from this feature of the concentration of digital news sites, some other aspects of the transition to digital media can be mentioned. First, it would also be inaccurate to attribute recent dynamics in media diversity entirely to the internet, as the transition to digital media has had arguably greater effects (Wilding et al. 2018, p. 46). One such development is the algorithms employed by digital platforms, remediating the massive web of news sources on the internet into a consumable form but simultaneously impacting choice (Dwyer, Martin & Goggin 2011, p. 61.4). Park et al. (2018, p. 64) observe that while both laptop users and mobile users have access to the internet, the digital device they use impacts not only the type and content of news they access but also whether they consume it actively or passively. While still under development, there has been an increase in automated journalism – utilising artificial intelligence to produce news content (Wilding et al. 2018) – which is likely to influence the content available.

A key note raised by Fisher, Park, et al. (2019, p. 111) in the *Digital News Report* is the extent to which demographic factors such as socio-economic status and media habits intersect with these digital impacts. For instance, mobile phone users evince certain usage patterns, such as less news consumption, but are more likely to be young people who lack the money for expansive data plans and multiple devices (Park et al. 2018, p. 67). This concurs with Roy Morgan (2018d), who found that cost impacts media choices.

International

As in Australia, media ownership across the world appears to be increasingly consolidated. According to the Department for Digital Culture Media and Sport (2018, p. 4), 97% of UK's 1,043 newspaper titles are owned by the top 20 media groups. The UK press has seen a consolidation of ownership particularly for regional media, though this is seen not so much as the acquisition of competitors, but rather to benefit from economies of scale (Department for Digital Culture Media and Sport 2018, p. 5). Many regional and local titles have been closed – particularly those that are part of larger media organisations. In New Zealand, media is characterised by duopolies and limited outlets (Myllylahti 2018), and the decline of newspapers in New Zealand is accelerating in pace (Myllylahti 2018, p. 17) – further limiting sources of media. To Sjøvaag (2016, p. 174), digital media and ownership consolidation has led to 'superplayers' that demand a renewed focus on media structures as an impediment to media diversity.

Conversely, there is evidence that diversity is not directly tied to diverse ownership. In South Africa, there is said to be pluralism without diversity (Duncan 2015, p. 237) – there are diverse owners and sources but this has not resulted in diverse content in terms of voice or representation. The government holds a concern that increased ethnic diversity in media could reinforce South African ethnic divisions (Duncan 2015, p. 239), preventing further focus. (It should be noted that these concerns would actually tie to a lack of diverse media consumption and fragmented audience in spite of diverse media availability, reinforcing the importance of analysing consumption instead of availability). By way of contrast – and despite the ownership concentration – Ellis and Thompson (Ellis & Thompson 2016, p. 38) have said that the ability to produce quality journalism in New Zealand has not quantifiably diminished.

In Canada, before digital and online transition was in full swing, newsrooms were already being downsized in lieu of wire services (Standing Senate Committee on Transport and Communications 2006). However, it has had some clear impacts on many countries' media diversity.

The most reported impact of digital transition was its effect on bottom lines and media sustainability. It has been said that the business model has collapsed for journalism in Canada (Public Policy Forum 2017, p. 16). Newspaper revenues are down across all countries but by different amounts (Public Policy Forum 2017, p. 18). The US has similarly reported a continuous decline of newspaper circulation (Pew Research Center 2016b, p. 10). A lot of Canadian digital ad revenue goes to US websites (Public Policy Forum 2017, p. 31). All Canadian media outlets report negative financial impacts of migrating online, with funds broadly being diverted to tech companies such as Google and Facebook (Standing Committee on Canadian Heritage 2017, p. 69). UK news media transitioning to digital online services have exchanged 'print pounds for digital pennies' (Department for Digital Culture Media and Sport 2018, p. 5), but online advertising spending vastly exceeds all other forms. For traditional media, transitioning to digital and diversifying into digital media has sometimes worked against media diversity directly, as in BBC's 'Fewer, Bigger, Better' digital transition campaign (Doyle 2015, p. 11).

However, despite this defunding, digital media has not significantly changed where news media is sourced. Material on digital platforms is often directly or indirectly produced by traditional media (Standing Committee on Canadian Heritage 2017, p. 17). Doyle advances the view that media organisations are less often creating new media for online and digital consumption and more often using the same content across multiple platforms (Doyle 2015, p. 10), suggesting the addition of this new type of media may have contributed less to media diversity than it seemed. Access to user data has further impacted this, with journalists using user data to focus on the kinds of news that gets the most views (Welbers et al. 2016). To protect their original production, paywalls on New Zealand digital news content are set to increase (Myllylahti 2018, p. 21). Even those US digital platforms that were presenting 'alternative news media' were actually sourcing their news from mainstream media outlets like *The New York Times* (Braman 2009, p. 147).

One view of these developments is that online news and digital technology have created a significant obstacle to news provisions – algorithms and digital platforms have become gatekeepers for news media content. Foster (Foster 2012, p. 5) has argued that digital intermediaries, such as Yahoo, Google, Facebook, or Apple, act as media gatekeepers and play a significant role in determining the level of pluralism in UK media, posing both opportunities and significant risks. The Cairncross Review (Department for Digital Culture Media and Sport 2019, p. 7) found that algorithms are having an impact on what news media consumers are exposed to, and O'Callaghan et al. (2015) found algorithms can easily lead consumers into white nationalist echo chambers in an effort to personalise content. While Haim, Graefe & Brosius (2018) suggest that fears of algorithms leaving users in a 'filter bubble' are exaggerated, they did find that intermediaries selected certain news sites over others despite the sites' popularity. Similarly, Nechushtai & Lewis (2018, p. 300) and Trielli & Diakopoulos (2019, p. 453) found that while news feeds did not significantly lead to an ideological echo chamber, they did lead to a lack of diverse sources.

An alternative view is that algorithms are not necessarily an obstacle to diversity, however, and they also provide opportunities. Overall, Burri (2016)) found that the internet has not been decisively positive for exposure diversity, but that intermediation by these online groups has a significant impact on the outcome. Further, Möller et al. (2018, p. 967) state that the impact of these algorithms needs to be understood in terms of their non-algorithmic equivalent – a human editor – and they ultimately lead to similarly diverse media. Further, algorithms are able to utilise users' history to suggest diversity in a way human editors cannot. Finally, the internet contains so much content that Nigerian research finds recommendation algorithms are vital for users to make sense of it (Isinkaye, Folajimi & Ojokoh 2015, p. 270). They can reinforce and narrow news usage patterns, but alternatively, they can diversify and expand usage patterns. Conversely, to cope with overabundance, some users consciously tailor their news diet. In one study of customisation (n=317), consumers who diversify online news streams report lower levels of anxiety about current events (Auxier & Vitak 2019).

While digital media and accessible online platforms theoretically open the door to media diversity through user-generated content, this can present further difficulties. The New Zealand Law Commission *Te Aka Matua o Te Ture* (2013, p. 4) suggests that New Zealand citizens broadly have the capacity 'to generate, debate and distribute news and opinion themselves, without reliance on the mainstream media', but this fails to acknowledge the pay and resources behind journalistic production – journalists are paid not only to report on events but also to uncover events, often through laborious and challenging work practices (Deuze 2005). UK user-generated online news programs often attack the credibility of mainstream news and suggest it is biased (Ofcom 2019b, p. 38).

1.5 Consumer access to diverse media

1.5.1 Demographics

Australia

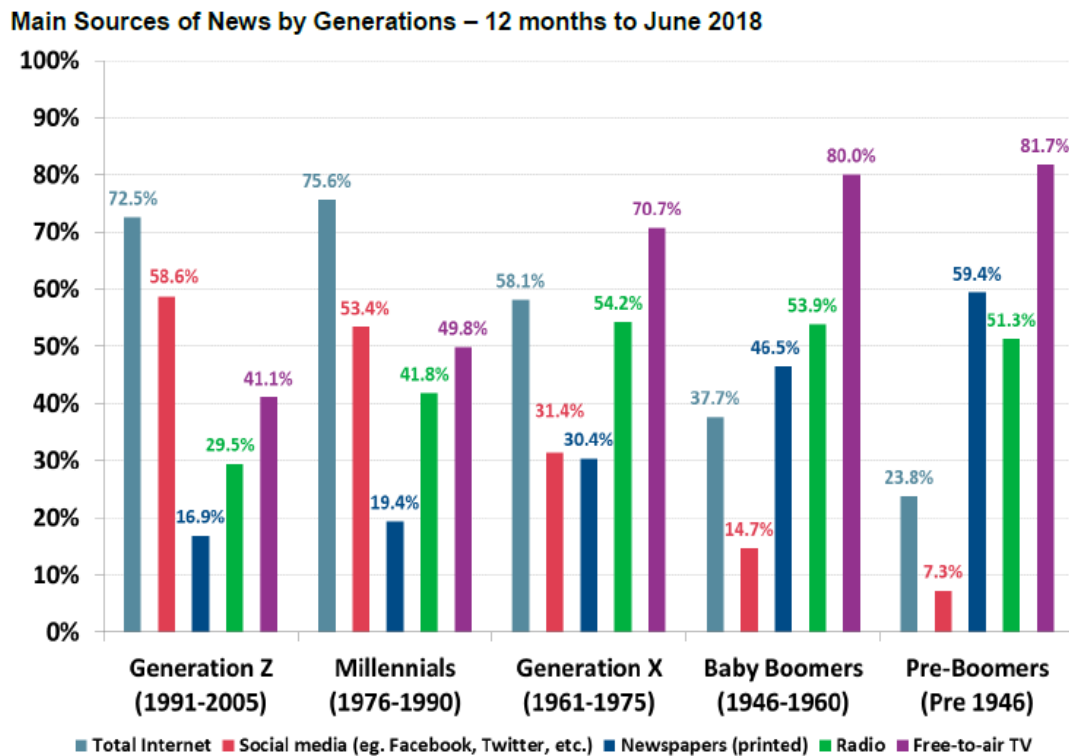
Before reviewing the data on Australian media diversity, it is useful to lay out the impact of demographics on use of media including news avoidance. According to the *Digital News Report Australia 2019* (Fisher, Park, et al. 2019), not only age but also gender, region, and education can play a significant role in consumer media choices. This concern is raised by the Department of Communications and the Arts in its report on media control (Department of Communications and the Arts 2015, p. 29), indicating the extent to which demographics need to be accommodated when measuring media diversity.

In various ways, age is the most impactful demographic factor behind differences for diversity, both of media type and of media source. Younger news consumers diverged from other demographics in their media consumption choices, with total internet sources and social media by itself both playing more of a central role than any traditional media (Fisher, Park, et al. 2019; Roy Morgan 2018a). For every older demographic, TV was the most prevalent main source of news, with the internet and social media falling behind all traditional media for users born before 1961, as shown in Figure 1.5 (Roy Morgan 2018f). Further, while every demographic used news websites to an extent, the choice of which website varied by age; the oldest Australians visited the websites of traditional Australian media publishers (such as the ABC website) while the youngest commonly

visited digital native or international news sites (Daily Mail or BuzzFeed) (Roy Morgan 2018d).

Young people, including children, use a wide variety of sources when they seek news, and are more likely to be active consumers of media (Gibson & McAllister 2015; Notley et al. 2017; Roy Morgan 2018b). Not all of these sources are online – children in particular largely prefer to get their news from parents (43%) than from any other source (Notley et al. 2017, p. 6). However, they are the least likely to use print newspapers or watch TV. Separate research has shown that adults below 35 years old are often the first to take on new sources, like podcasting (Wilding et al. 2018, p. 26). Younger and educated demographics’ active pursuit of political views on the internet has created a gap of political knowledge between them and other demographics (Gibson & McAllister 2015), highlighting the significance of this divergence.

Figure 1.5 Australian media use diversity by age



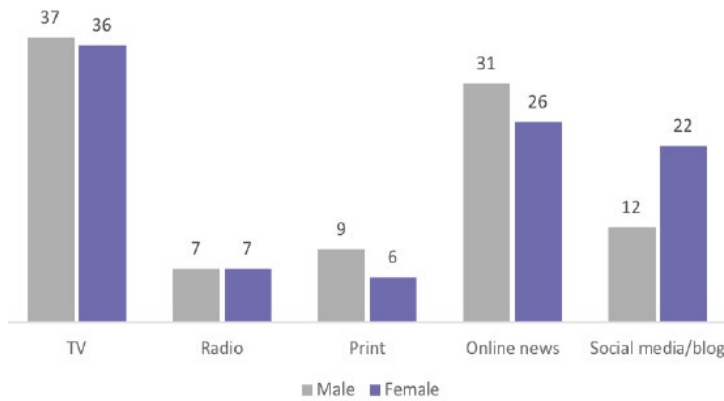
Source: Roy Morgan Single Source July 2017 - June 2018, n = 14,920. Base: Australians 14+.

Source: (Roy Morgan 2018f)

While less prevalent, gender also led to differences in media use. This is particularly the case for social media: as shown in Figure 1.6, women were nearly twice as likely (12% compared to 22%) to use social media as their primary news source (Park et al. 2018, p. 52). Conversely, men are more likely to engage with commenting features on online news stories (Martin 2015) and more likely to consume news through TV (Papathanassopoulos et al. 2013, p. 700). While news avoidance behaviours were not uncommon for both genders, they were more common for women: 60% of ‘no news’ readers were women, according to Papathanassopoulos et al. (2013). Women news

consumers in Australia are more likely to actively avoid news: 67% for women versus 58% for men (Fisher, Park, et al. 2019, p. 33).

Figure 1.6 Use of media as news source by gender



Source: (Park et al. 2018, p. 52)

Minority groups vary in specific ways that relates to their unique social situations. Their behaviours frequently relate to their distinct needs that are not fulfilled by mainstream media. For Australian Muslims, for instance, this often relates to finding content that suits their interests (Ewart, Cherney & Murphy 2017, p. 150). Indigenous and immigrant communities feel that digital platforms provide a space tailored to their groups' needs for content and an outlet for their concerns (Roy Morgan 2018b, p. 7). The benefits of seeking diverse media for these groups extend beyond voices and representation, as ethnic groups can also get better access to media in their own language through channels like community radio (Ewart 2012).

Education and particularly news media literacy were key determinants of consumers' media diversity. People with higher levels of news media literacy are most likely to seek out more media sources, yet 68% of the Australian news consumers ranked low or very low literacy in the 2018 *Digital News Report* (Park et al. 2018, p. 43). Both Park et al. (2018, p. 46) and Roy Morgan (2018b, p. 32) find that less educated consumers are more likely to engage in passive news consumption through social media. Higher levels of news media literacy were associated with older (45+) news consumers.

Some other demographic points concerning online news can be noted:

- some groups of people, including younger adults, participate extensively in news sharing (Dwyer & Martin 2017; Fisher, Park, et al. 2019, p. 97);
- people who browse social media extensively are often passively exposed to additional news (Fletcher & Nielsen 2018), though they are less likely to actively access news (Roy Morgan 2018b, p. 32);
- highly-politically active and engaged consumers use different sources than the less engaged (Fray, Molitorisz & Marshall 2018, p. 32);
- more people are consuming multiple types of media at the same time (ACMA 2019; Fisher, Park, et al. 2019; Roy Morgan 2017).

Finally, some people simply avoid news altogether (Fisher, Park, et al. 2019, p. 88; Papathanassopoulos et al. 2013), though more people are consuming more news than in the past (Fisher, Park, et al. 2019, p. 25).

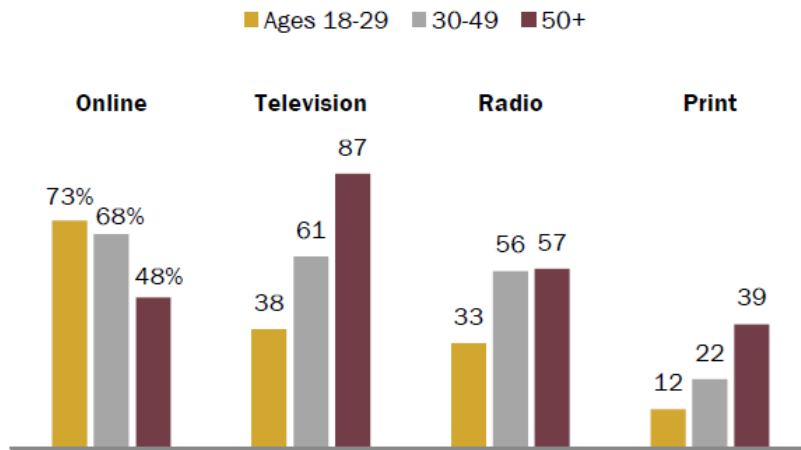
International

As in Australia, demographics were identified as having an impact on the diversity of media consumed. While age again presented as the most significant, socio-economic status, education, literacy, and personal media habits also played important roles.

Media consumption differed consistently from younger to older media consumers. In the UK, younger consumers have exhibited a drop in newspaper consumption – from 36% to 14% – and less than half get news from TV (Department for Digital Culture Media and Sport 2018, p. 4). The unique media choices covered both content and type (Ofcom 2019a, pp. 2-3). While virtually all of the youngest demographic (16-24) use the internet (99%), half (48%) of consumers over 75 do not. Commensurately, young people were four times more likely (88% compared to 22%) to watch online video and streaming content. These correlations continued consistently across age groups. Similarly, as Figure 1.7 shows, the gap in TV use between younger and older audiences is significant in Europe (38% for 18-29 year-olds compared to 87% for those aged 50+), while this is nearly reversed for online news consumption (73% compared to 48%) (Pew Research Center 2018e, p. 6). Matsa (2018) found only 8% of US young consumers watch network TV, but Diehl, Barnidge & Gil de Zúñiga (2018, p. 16) found that young people are more likely to consume their news across multiple platforms. Conversely, Pew Research Center (2017a) found that the digital gap is closing in some ways – digital device penetration among older demographics is increasing.

Figure 1.7 Media consumption by type and age

Across eight Western European countries, median percent of adults in each age group who get news at least daily from ...



Note: Percentages are medians based on eight Western European countries.

Source: Survey of eight Western European countries conducted Oct. 30-Dec. 20, 2017.

"Western Europeans Under 30 View News Media Less Positively, Rely More on Digital Platforms Than Older Adults"

PEW RESEARCH CENTER

Source: (Pew Research Center 2018e, p. 6)

Some media habits tie strongly to diverse media use, and some of this correlates with other demographic factors like age and education. In the US, it was found that, in practice, people simply do not consume very much political content, and those who do are more likely to engage with diverse media (Guess et al. 2018, p. 10) – people are more likely to encounter diverse news and viewpoints in the media than in their in-person social interactions. A UK qualitative study (Ofcom 2018a, p. 17) found that habit, routine and context significantly shaped consumer patterns of news media consumption. Most people engage with news in some way in the morning, for instance, while respondents were split between deeper engagement and complete avoidance in the evening. Ofcom (2019b, p. 10) found that changes in life stages appear to correspond to changes in media habits and consequent consumption in the UK; people leaving university no longer have time to be online, where the reverse is true of retirees with more time at home. There is a growing divide between the media consumption of advanced and basic internet users – more diverse and technically-complex online media habits are yielding dramatically more media diversity. These habits also correlate to age and education (Ofcom 2019b, p. 8). The potential for digital media to promote echo chambers has not been clearly reflected among UK media consumers (Dubois & Blank 2018, p. 737), according to consumer self-assessment (n = 148). But the subset of participants in the study with a stated disinterest in politics and with limited diversity of exposure did appear to inhabit an echo chamber (Dubois & Blank 2018, p. 741).

A gap in knowledge, be it through level of education or level of media literacy, also came up as significant for the diversity of media consumed. A lack of education or political knowledge, coupled with cynicism, can drive behaviours of news avoidance in UK adults

(Schröder 2019, p. 5). The divide between the educated and literate was self-sustaining: the stronger their digital skillset, the more likely consumers are to seek out and utilise specifically educational online media (Ofcom 2019b, p. 14). There is a tie between literacy and age. Pew Research Center (2018b, p. 14) found that older Europeans were less likely to know the source behind the news they consume of social media, for instance. This may explain why younger Europeans are more likely to visit established newspaper brands online, even though they are less likely to buy a print paper (p. 20). Conversely, users with lower education levels benefit more from the presence of diverse sources (van der Wurff 2011, p. 336), though the biggest predictors of enhanced exposure diversity proved to be interest and public affairs knowledge.

While the number of relevant studies was limited, socio-economic differences in media use also arose. In the UK, socio-economic status correlates with different patterns of media use (Ofcom 2019a, p. 4). Poorer households are more likely to only use phones to access the internet (17% compared to 4% for the wealthiest, the people in the AB percentile) and less likely to view streaming and online video (46% compared to 73%). They are less able to detect advertising and less aware of how media companies can collect their data. And less likely to use the internet at all (23% compared to 6% for the wealthiest).

Similar to results in Australia, ethnic minorities have also showed distinct patterns of media use. In the US, non-white groups are more likely to get news through digital platforms like social media (74% v 64%) (Pew Research Center 2017b, p. 3). Napoli (2005, p. 351) notes that audience measurement often misrepresents minority audiences, making their activity harder to track and potentially leaving them under-represented as consumers. Similarly, language is a key predictor of media choices, as is geographic location (Taneja & Webster 2015). However, there is limited focus on this demographic split in Europe and elsewhere.

1.5.2 Consumer use of diverse media

Australia

While there is less research in Australia than in some other comparable jurisdictions, there is still evidence, as the ACMA (2019, p. 53), has observed, of diversity in *availability* of media sources for many Australians. Whether this translates into diverse *consumption* is a different matter: Flew, Suwana and Tam argue there is limited exposure diversity in Australia (Flew, Suwana & Tam 2018, p. 16).

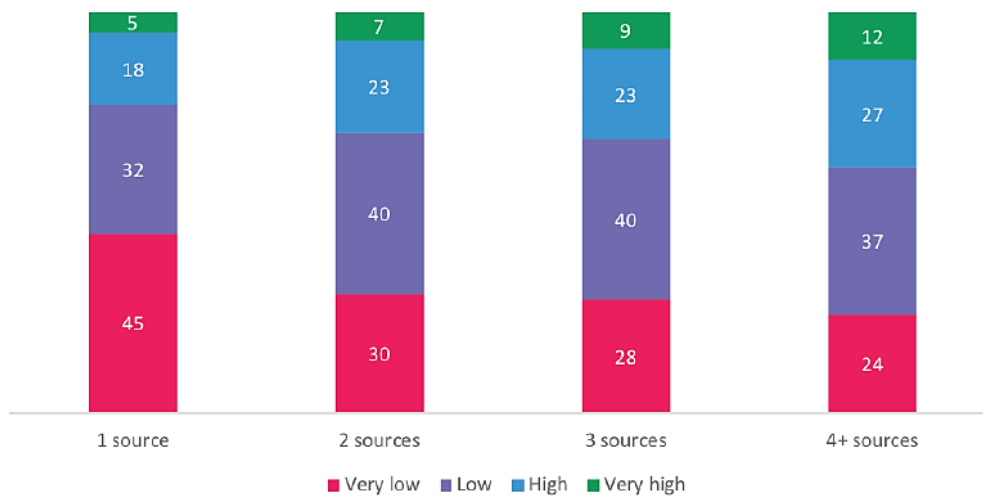
In the past, **television** dominated and in fact it continues to dominate today for most demographics (Roy Morgan 2018f), but its viewership is slowly shrinking and a majority of Australians now also turn to news websites (Roy Morgan 2018d). The reason why online news consumption has not outright displaced other news consumption is that Australians now consume more news than ever (Fisher, Park, et al. 2019, p. 25) – often consuming through multiple media types at the same time (Roy Morgan 2017, p. 6). This diversity of media types is not accessed equally by all demographics, and this point is explored in Table 7 above.

Print consumption is not dead. Just over three-quarters (76.3%) of Australians aged 14+ still read hard-copy or online newspapers, with a slight decrease from a year ago (Roy Morgan 2018c) and the market for magazines appears to be expanding (Roy Morgan

2019). For online news, people use mobile phones more than computers (Roy Morgan 2018a, p. 12), but their behaviour changes depending on the pathway – mobile users are more often social media consumers (Park et al. 2018, p. 56), which Roy Morgan found to constitute passive news consumption (2018b, p. 32).

Particularly for the young or media-literate, digital media has introduced variety to media sources. While offline news outlets remain dominant sources of news (53%), online news is accessed by more news consumers overall (82% compared to 79%) (Park et al. 2018, p. 50). Online news media consumers who tend to use the lowest number of news sources also tend to have the lowest level of news literacy, as shown by Figure 1.8 (Park et al. 2018, p. 46). Internet access has opened the way for consumers to access news directly from some sources, though this is more popular among younger users (Fisher, Culloty, et al. 2019, p. 234). Digital platforms have provided access to not only more sources but also sources that suit specific interests and needs. Some 89% of digital platform users look for and read news and 81% watch or listen to news on the platforms. Less-educated users mostly encounter these sources passively (Roy Morgan 2018b) and incidentally (Fletcher & Nielsen 2018). Consumers have found different sources offer different kinds of content, and move from outlet to outlet depending on the kind of news they are seeking (Muscat 2018, p. 226).

Figure 1.8 Level of literacy per sources accessed for news



Source: (Park et al. 2018, p. 46)

Whether there has been an increase in the diversity of perspectives is less apparent, however. Digital platform users have gained access to new perspectives through active media use (Roy Morgan 2018b, p. 32) but their audience skews towards younger audiences. While community radio offers perspective for minority or immigrant communities (Ewart 2012), the overall number of sources available offline continues to decline – particularly for regional media (covered more in the Localism chapter) (Senate Select Committee on the Future of Public Interest Journalism 2018).

International

While there is extensive research, both qualitative and quantitative, on media consumption, other research has presented a caveat. A crucial finding of qualitative research by Ofcom (2018d, p. 13) was that self-reported media use diverged significantly from use in practice. All but one of the 22 participants used online news extensively in practice, but usage was under-reported, and most participants claimed to access news more equally across media types. Disparities between reported use of news and actual use of news could come down to device – content on mobile phones, the primary device (Ofcom 2018d, p. 5), was consumed unconsciously and consumers often struggled to classify content as news. By contrast, legacy media content was consistently correctly identified as news media. Similarly, Kennedy & Prat (2019, p. 14) found that US consumers could be exposed to a source without ever ‘consuming’ it due to the in-person social contact they have with people in their proximal communities. This might suggest, in conjunction with consumer dissatisfaction with news media noted above, that use data gained from self-assessment surveys does not provide a complete picture of consumer behaviour.

Nevertheless, there have been revealing approaches to surveying media diversity, particularly research on diversity of sources. Ofcom (2018c) canvassed media consumers to find their favourite sources *across* media types; this stands in contrast to Australian survey results which consider a single platform such as television (Roy Morgan 2018f) or the web (Roy Morgan 2018d). This survey found, for instance, that almost twice as many adults in the UK reported using BBC One on TV as reported using Facebook ‘for news nowadays’, as shown in Figure 1.9. However, it should be noted that Facebook, WhatsApp and Instagram were all more popular or equal to the popularity of BBC Radio 1, the corporation’s youth station.

Figure 1.9 News sources across platforms

Top 20 news sources - 2018

% of all adults 16+ using each source for news nowadays

	2018
BBC One	62%
ITV/ITV WALES/UTV/STV	41%
Facebook	33%
BBC News Channel	26%
Sky News Channel	24%
BBC website/app	23%
Channel 4	18%
Google (search engine)	17%
Twitter	14%
BBC Two	14%
Daily Mail	12%
BBC Radio 2	12%
Channel 5	10%
BBC Radio 4	10%
WhatsApp	10%
Instagram	9%
The Metro	9%
BBC Radio 1	9%
The Sun	8%
Mail on Sunday	8%

- TV Channel
- Newspaper
- Radio station
- Social media
- Website/app

Source: Ofcom News Consumption Survey 2018
 Question: D2a-8a. Thinking specifically about <platform>, which of the following do you use for news nowadays?
 Base: All adults 16+ –2018=4618

Source: (Ofcom 2018c, p. 21)

The most extensive research focuses on diversity by media type, especially the rise of social media. Even in 2012, social media was becoming a significant source of news, according to a Canadian quantitative study of consumers by Hermida et al. (2012). In the US, by 2018, 68% of adults were obtaining at least some of their news from social media (Pew Research Center 2018c, p. 3). In the UK in 2018, social media was the most popular source for online news (44% compared to 37% for all other online sources) (Ofcom 2018c, p. 9). Pew Research Center (2018b, p. 13) found, however, that European social media use also corresponds with age. Digging deeper, Pew Research Center (2018c, p. 5) found that demographics also affected which social media platform specifically was used by US consumers.

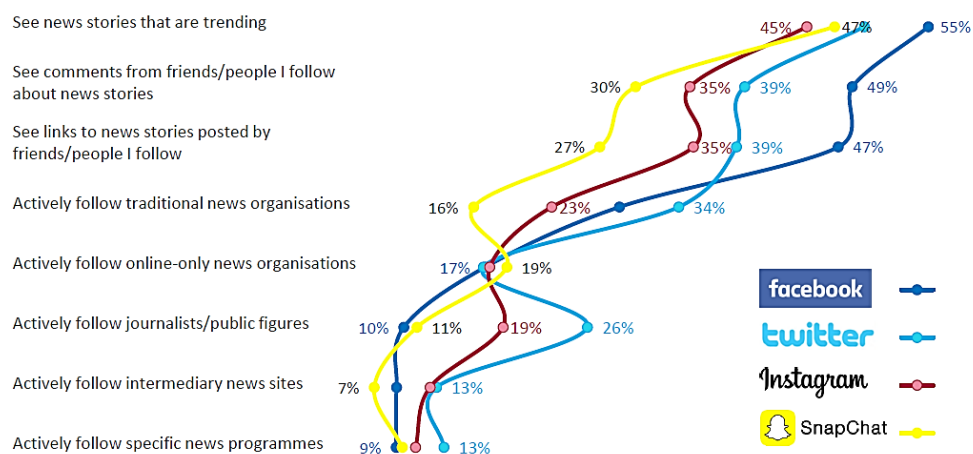
However, how people use social media and how social media changes the diversity of their media consumption varies. Mahmood & Sismeiro (2017) found that homophily, bonding with people similar to yourself, had a significant impact on online media consumption in the UK. People’s media use correlated with the visible activity of their contacts in social media. Facebook use in the UK decreased overall between 2017 and 2018 (91% compared to 88%); its use as a source of news decreased by a greater amount – 70% used it for news in 2017 but only 58% did a year later (Ofcom 2019a, p. 9). The kind of social media used also had an impact on how much news was consumed, according to Pew Research Center (2018c, p. 4) – Reddit users were exposed to much more news than Instagram users, for instance (73% versus 32%), though both operate in the social news/news aggregation space. It does play some part

in enriching diversity, however: Almgren (2017, p. 1069) found that users in general share less ‘churnalism’ and soft news, providing a filter for social media news. However, Ofcom’s research shows the extent to which social media use is passive. As shown in Figure 1.10 below, Ofcom found that across social media sites, ‘news is most likely to be accessed via “stories that are trending”, followed by “seeing comments from friends/people I follow” and “links to stories”’ (Ofcom 2018c, p. 51). There is evidence that this use could connect to the creation of an echo chamber: more social media users in the UK say it is rare to find views they disagree with in their social media use than in the past (18% in 2017 compared to 24%) (Ofcom 2019a, p. 9). While Fisher, Park & Lee (2019, p. 80) and Möller et al. (2018) suggest that the algorithmic sorting of platforms does not lead users to echo chambers, the results from Ofcom (2019a)) suggest the impacts of algorithms are not yet understood.

Figure 1.10 How UK users see news on major social media platforms, showing mostly passive consumption

How news is accessed via social media - 2018

All using each type of social media for news



Source: (Ofcom 2018c, p. 51)

Online news websites are being utilised, but this is not making up for losses of diversity due to the shrinking of offline media. As the number of Canadian traditional news outlets declines, digital news outlets are not rising up to take their place (Public Policy Forum 2017, p. 26). A challenge for measuring diversity is that Canadian sources of opinion are multiplying but sources of fact are diminishing (Public Policy Forum 2017, p. 48). This shift is problematic because, according to the Cairncross Review in the UK (Department for Digital Culture Media and Sport 2019, p. 7), written journalism provides the largest quantity of original content, and is the most under threat.

TV remains dominant for all but younger demographics, as in Australia, but the way television is used has also changed. The Eurobarometer reveals that Europeans still use TV the most for news media, but online sourcing is increasing and has exceeded TV in several countries (European Commission 2018, p. 177), and Matsa (2018) suggests TV is increasingly watched by only a minority of viewers. TV maintains a dominant presence in UK, but, as in Australia, this is less so for young people and, to a lesser extent, ethnic minorities (Ofcom 2018c, p. 8). BBC One is the most used channel for news – 27% cite it as their main source. TV was the most popular source for both local and international

news. Other UK research reveals that TV use is fragmenting and that TVs are being sidelined for other media types – participants in their study reported that live viewing is now rare (Ofcom 2019b, p. 20).

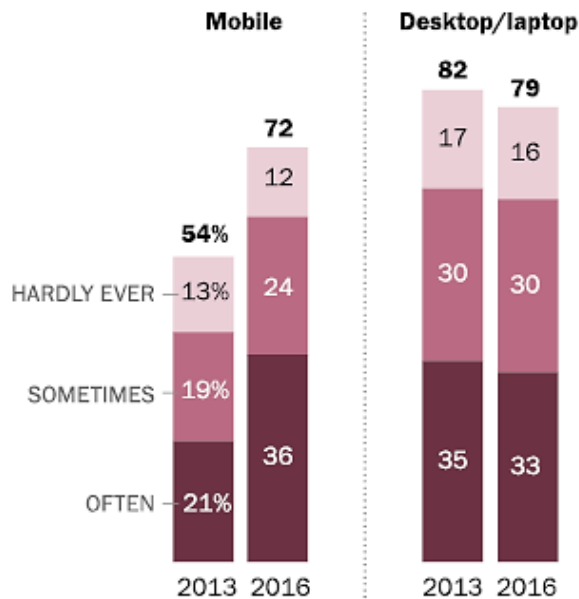
People do still like to watch rather than read their media content; they just do it less through television. Video-on-demand and online content streaming are becoming central to the media diets of UK media consumers (55% in 2017 compared to 60% in 2018) (Ofcom 2019a, p. 7). As a consequence of UK media users watching less television, they also report seeing less news overall and fewer sources of news (Ofcom 2019b, p. 36). In the US, there has been an increase in the preference to watch news at the same time as a drop in the use of TV – most people have just started viewing it online (Pew Research Center 2018a, p. 2).

Perhaps the biggest changes have come as a result of increased use of smartphones as a media type. Mobile phones have expanded their integration as a dominant media device in the UK – 96% of adults have them and 11% only use their phones to access the internet (Ofcom 2019a, p. 5), with fewer people using their computers to access the internet than before (p. 6). As for Australia, US research indicates a continuous and rapid rise of mobile phone access to news, as seen in Figure 1.11 (Pew Research Center 2016a, p. 7). This coincides with the pace of change of online media consumption practices increasing in the UK, and moving towards passive, unconscious consumption (Ofcom 2018d, p. 3).

Figure 1.11 Changes in device used to access news

Rapid growth since 2013 in portion using mobile to get news; desktop/laptop usage holds steady

% of U.S. adults who ever get news on ...



Source: (Pew Research Center 2016a, p. 7)

Commensurate with the rise of mobile phones is the rise of news apps and an intermediary of rising significance: newsfeeds. In a South Korean study, people spent less time searching for news when a popularity-based recommendation list was present, but this also influenced the media they chose – 80% of stories picked were from the recommendations (Yang 2016, p. 260), and they spent more time reading them. By contrast, users without recommendation lists spent more time searching and only chose 49.31% of their stories from the front page (p. 259). In a UK study, newsfeed interfaces were ubiquitous in news apps on phones, the primary device for consuming news according to Ofcom (2018d, p. 6). They also kept people in-app, precluding them from jumping to other sources. Indeed, US news consumers found their consumption of news was often incidental – the platforms had pushed the news on them while they were doing other things (Brown, Wenzel & Roca-Sales 2017, p. 3). A qualitative study found that the lack of transparency behind the newsfeed left many US respondents distrustful (p. 22).

A final aspect of media consumption is how convergence has impacted consumer behaviours. A South Korean study found a high level of substitutability between media types, making media assessments difficult because the different media types had distinct functions and formats – mobile media can substitute for television or newspaper, for instance, with the same or similar content, but televisions do not directly substitute for newspapers (Jang & Park 2016, p. 80).

1.6 Consumer attitudes to media diversity

1.6.1 General - understanding and importance of media diversity

Australian

While some recent research (noted in section 1.5) has asked consumers about their *access* to media, it appears that nationally-representative surveys have not been used to ask consumers whether they actually *use* sources that are available to them, including whether aspects such as paywalls affect their perceptions of diversity. The lack of data on consumer attitudes to source and ownership diversity is particularly apparent, given the attention it has received from government and from Parliamentary committees (Department of Communications and the Arts 2015; Senate Select Committee on the Future of Public Interest Journalism 2018) and from academics (Brevini 2015; Dwyer et al. 2006; Hitchens 2015).

One area that has been discussed with Australian consumers is the benefit of newsfeeds on their media diversity, and the results are mixed. In a 2018 survey, 54% agreed that everyone should be exposed to the same (rather than tailored) news; however, 30% agreed that they liked having digital platforms tailor their news. Less than half agreed that digital platforms 'tailored' stories shown based on the preferences and likes of an individual's online 'friends' (47%), and three in ten (30%) agreed that they did not understand how digital platforms curated online news (Roy Morgan 2018b, p. 36).

The limited research available generally focuses on subpopulations or specific media. For instance, one study has shown a desire for alternative frames on topical issues drives politically-engaged consumers to seek out media diversity for themselves, finding mainstream media frames too narrow (Fisher, Culloty, et al. 2019, p. 242). These consumers also employ this active approach to media diversity to corroborate the news they find elsewhere. Australian Muslims see a lack of perspective as well as relatable content in Australian media (Ewart, Cherney & Murphy 2017). The loss of local and regional media has been felt by local consumers, as well, but this is covered further in the Localism chapter.

For minority groups, a desire for representation and relatability in content diversity is a concern, and many have found some satisfaction online. People who seek specific kinds of news or news that concerns and comes from their minority, immigrant, or indigenous group often preferred online platforms (Roy Morgan 2018b) – international news was the most accessed. McCallum, Waller & Dreher (2016, pp. 35-7) found that Indigenous Australians found better representation online, particularly through social media, but new entrants like *The Guardian* have also been noted for paying active attention to their community compared with offline Australian media outlets. The study of Muslim Australians found dissatisfaction with lack of representation in the current offerings of Australian media. A study of community radio found that inclusion of this representation can yield significant benefits in terms of satisfaction with the media (Ewart 2012).

The issue of diversity of voices and representation is particularly important in the context of Aboriginal and Torres Strait Islander peoples. They enjoy the availability of media that represents and relates to their ethnic group (Indigenous Remote Communications Association 2016, p. 27). The issue of how these groups are treated in the media has led

to a dedicated publication from Media Diversity Australia giving standards and cultural context for media producers (Media Diversity Australia 2018).

However, diversity did not stand out in the literature as an issue of decisive importance. Trust also factored in significantly for the larger population of news consumers (Park et al. 2018), and while Australian news consumers are exposed to diverse news online (Fletcher & Nielsen 2018), they are deeply distrustful of it (Roy Morgan 2018e). Even just being entertained or finding sources that tended to agree with their world view were regarded as more important than diversity (Roy Morgan 2018a, p. 6).

It is important to note that there is no investigation of what consumers understand of the concept of media diversity, and most diversity questions related to diversity of perspectives or diversity of content – their understanding and evaluation of the pivotal areas of exposure diversity, ownership diversity, and diversity of media type or genre were not investigated.

International

While consumers internationally were rarely asked specifically about the importance of diversity, there is some indication that they find it valuable. For instance, Canadians felt democratic societal functions would be threatened if types of media were to disappear (Public Policy Forum 2017, p. 41).⁴

In particular, studies found that consumers value diverse media content. In the UK, media consumers provided a range of content characteristics that were important to them: quality, diverse and exotic content, representation, relatability, and realism (Ofcom 2019b, p. 25). In a qualitative study, Ofcom (2018a, p. 9) found that consumers needed and sought factual information about the events that surrounded them. However, UK media consumers were not found to seek out news for its news qualities but rather for its relevance and their interest. They sought content that suited their individual set of interests, not newsworthy news media content (Schrøder 2019, p. 12).

Other research indicated that diversity of media genres was also important. UK audiences identified news in a wide variety of genres, according to a qualitative Ofcom (2018a, p. 10) study, including comedy shows and 'selfie news'. Schrøder (2019, p. 5) found that audiences make their own meanings of the content that is present: celebrity news may be received as politically significant news if it discusses crime, for instance (p. 9). She found that UK consumers prefer news that is 'relevant', with that relevance being tied to their social context and the media's shareability within their community.

As with the Australian research, in the US the Pew Research Center (2018c, p. 8) found people choosing to access news through social media due to its convenience rather than its diversity, again indicating that people may not be factoring diversity into their choices.

Most of this data came from qualitative research, however, and large sample studies were not available.

⁴ This research is based on a random sample of 1,500 adult Canadians surveyed online.

1.7 Consumer concerns about media diversity

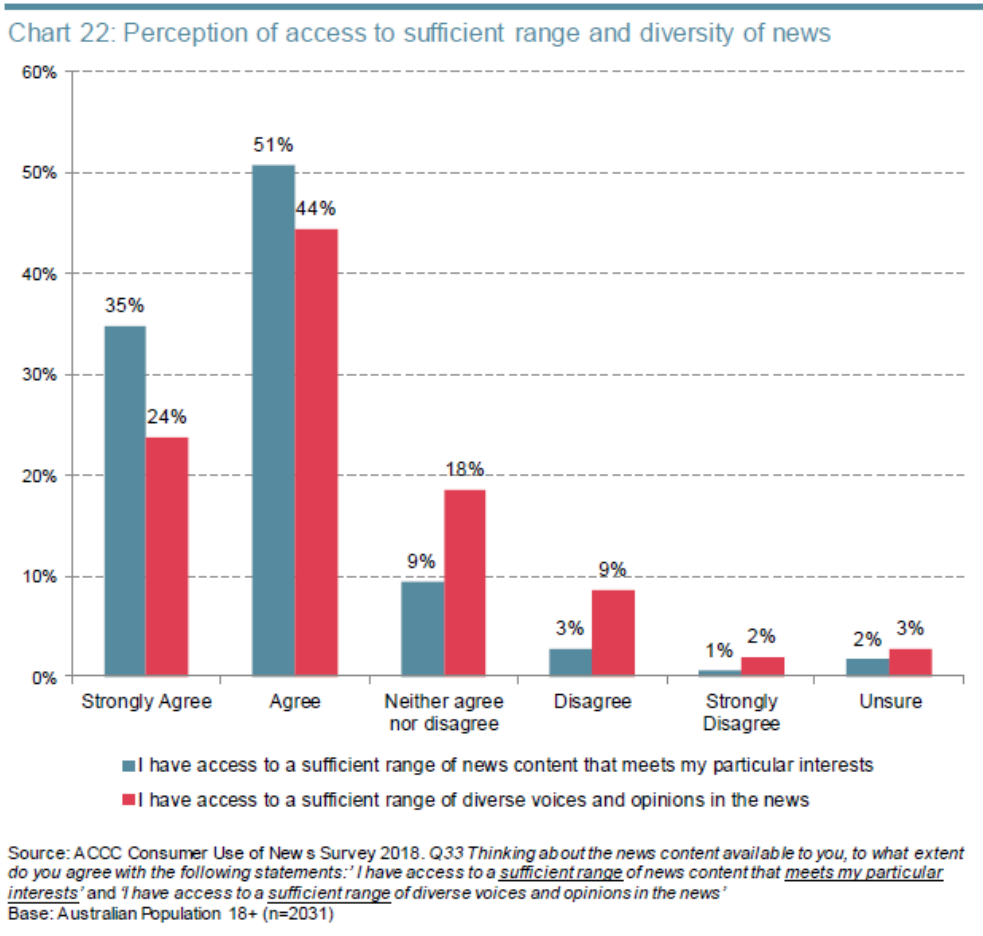
1.7.1 Consumer satisfaction with media diversity

Australian

As Figure 1.12 below shows, recent research by Roy Morgan for the ACCC (Roy Morgan 2018a, p. 19) showed that Australians broadly are satisfied that the current media environment provides content that matches their interest and provides a diversity of voices. Though the results for the second measure are less than the first, there were still 66 per cent of Australian adults who agreed or strongly agreed with the proposition that 'I have access to a sufficient range of diverse voices and opinions in the news'.

The affordances flowing from the internet appears to have aided consumer satisfaction: qualitative and quantitative research has found that users appreciate the opportunity to read and produce user-generated content (Barnes 2014, p. 550), share news (Dwyer & Martin 2017), access diverse sources through digital platforms to complement traditional media (Roy Morgan 2018b, p. 7), and to use the internet to go directly to news sources (Fray, Molitorisz & Marshall 2018, p. 56).

Figure 1.12 Consumer satisfaction with media diversity



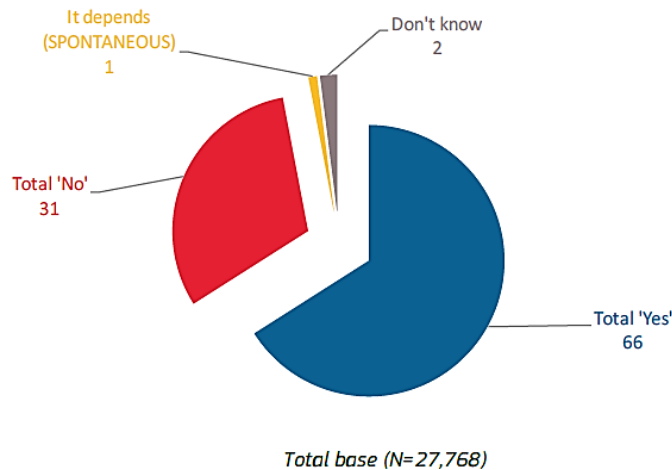
Source: (Roy Morgan (2018b, p. 19).

International

Studies of general media consumer satisfaction with the level of media diversity were similarly rare, though the results are consistent with Australia's. The European Commission (2016, p. 4) found that Europeans are largely (66%) satisfied with the diversity of voices in their media (see Figure 1.13) – and a majority (73%) feel the situation is either stable or improving with time. Despite this diversity of voices, however, they also feel that the media is dominated by political and commercial interests, and that this dominance of communicative power is expanding (p. 19). For social media, a majority of Europeans signal that they think social media keeps people informed of political affairs (57%) (European Commission 2018, p. 195) but they also think the information is not trustworthy (53%).

Figure 1.13 Eurobarometer 452 (European Commission 2016) measure of media diversity satisfaction

QC1.2 For each of the following statements, please tell me to what extent it corresponds or not to the situation of the (NATIONALITY) media:
 (NATIONALITY) media provide a diversity of views and opinions (% - EU)



Source: (European Commission 2016).

As in Australia, New Zealand research found immigrants and ethnic minorities are dissatisfied with mainstream news coverage (Ross 2017). While not focused specifically on diversity, a study found that UK consumers felt that news was negative and constantly being pushed on them, fuelling a fatigue that was putting them off news media (Ofcom 2018a, p. 42). This pushing led them to view news passively and superficially and to not like news media – raising questions about the extent to which usage data can make precise statements about news consumers.

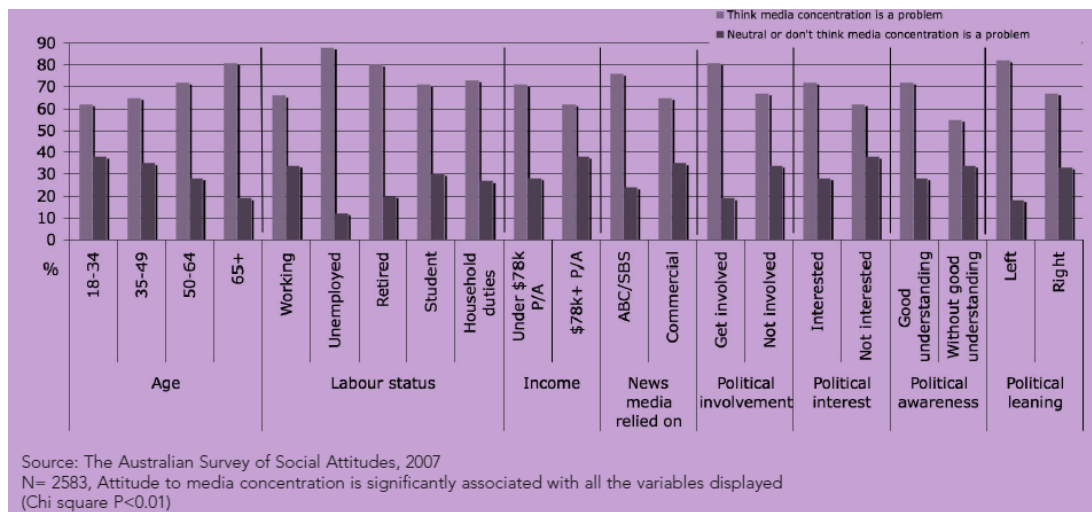
Relating specifically to developments since the rise of digital media, there has been a transition in how audiences view new media channels, such as social media. In a 2012 quantitative study in Canada, social media users felt it provided them with a wider range of news than they could find in traditional media (Hermida et al. 2012, p. 819). Newman et al. (2019, p. 10) found more recently a lack of trust in the reliability of social media as a platform for news – only 23% trust its contents.

1.7.2 Consumer views on ownership diversity

Australian

In 2007, the Australian Survey of Social Attitudes asked consumers to agree or disagree with the sentence 'Media ownership in Australia is too concentrated among a few rich families'. The result was that 69% of consumers agreed (Jones & Pusey 2008, p. 590), suggesting that – at least in the previous decade – this is something that concerned Australians. A breakdown of responses by age and other factors is shown in Figure 1.14.

Figure 1.14 Demographics of Australians who think media ownership is a problem



Source: Jones & Pusey (2008, p. 590).

Apart from Muscat (2018, p. 225), who found that consumers see differing levels of authority and quality in the contents coming from specific sources (focusing on source rather than ownership specifically), no other studies investigated consumer views on the impact of ownership were found.

Given that Park et al. (2018, p. 42) found news media literacy was low among Australian news consumers, any measurement of satisfaction with media ownership diversity would need to be complemented with a gauge of their level of knowledge on the subject.

International

There have been extensive comments from academics, politicians, and industry bodies on ownership diversity, but no studies (within the search criteria) that specifically asked how the public felt about the diversity of media ownership could be found. This is a particularly salient gap given that the European Commission (2016, p. 19) found Europeans feel their media is dominated by select groups, yet they did not survey them for their views on ownership diversity – only (as noted above) diversity of voices. This may be because, according to Craufurd-Smith & Stolte (2014, p. 3), EU consumers usually do not know who owns their media, and finding out often required high levels of media literacy. However, some survey participants did bring the subject up themselves in qualitative research: a qualitative study of UK media consumers finds they are frustrated with the dominance of major media and technology organisations – particularly regarding the increasing barriers to user-generated content (Ofcom 2019b, p. 30). A decade ago in the US, consumers indicated an increasing distrust of concentrations of private power, such as that held by media organisations – though this was secondary to the US distrust of government control (Horwitz 2009, p. 10). This concurs with the general distrust found in qualitative research by Fray, Molitorisz & Marshall (2018) in Australia.

1.8 Government approaches to understanding, evaluating, and cultivating media diversity

1.8.1 Policy concerns

Australia

While there have been few reports on audience perspectives and uses of media diversity, there is a broader body of literature on recent developments in media diversity and related policies and regulation in Australia. This includes, for example, submissions to the Convergence Review in 2012 and to Parliamentary inquiries into media reform (referred to above) in 2016 and 2017, as well as academic comment on these policy developments e.g., (Flew & Swift 2013). Where the audience's position is largely unexamined, several scholars have argued that the level of diversity in media has significant impacts. Dwyer et al. (2006), in studying the Australian media landscape, summarise media diversity's importance as:

A way that can help preserve a diversity of views, news, and opinion in the content of mass circulation newspapers and commercial radio and television broadcasts. It may also mitigate the possibility of one proprietor wielding too much influence in society, or help prevent conflicts of interest that may occur where media owners have substantial non-media commercial operations (p.12).

International

Governments and academics internationally have provided a range of descriptions of the definition and importance of diverse and pluralistic media. As with the definition above, Foster (2012, p. 5) in the UK suggests that media plurality means both having diverse media content and a system that disrupts dominance of communicative power. Both of these concerns work together, according to Gibbons (2015, p. 23), to ensure the public has the tools they need for effective democratic decision-making.

Particular and significant benefits have been identified for cultivating a pluralistic media. Canadian ethnic media provides a remedy for cultural isolation (Standing Committee on Canadian Heritage 2017, p. 17). Craufurd-Smith & Tambini (2012, p. 38) indicate the importance of diverse ownership due to the media's agenda setting and framing of news capacity to impact democratic discourse. Foster (2012, p. 12) suggests importance of media plurality is in its contribution to journalism's crucial component of society's democratic debates and structures of accountability. The Cairncross Review (Department for Digital Culture Media and Sport 2019, p. 7) found that a reduction in public interest journalism decreases civic engagement.

However, approaches to achieving diverse media remain confounded, especially when it comes to media ownership. According to Collins & Cave (2013, p. 312), diverse ownership has not been concretely or consistently correlated to diverse content. This reflects the findings of Duncan (2015) on South Africa's media ecosystem. An example of this can be seen in Italy's political broadcast programs: media duopolies can compete for the same generalist audience, ignoring anti-political audiences (Ceron & Splendore 2018, p. 12). Conversely, competition, and its benefits, are quantifiably negatively impacted by diminished ownership diversity (Doyle 2015, p. 4) – demonstrated in industries beyond media. Doyle (2015) notes that highly fragmented markets can be highly inefficient and lead to wasteful duplication. Craufurd-Smith & Tambini (2012, p.

39) point out that consolidated media markets can be better positioned to cover more angles to suit a broader audience, improving media diversity, but can conversely constrain the number of sources and marginalise alternative viewpoints, so the specific media environment needs to be considered.

Further, there is not a consensus view on the purposes behind media plurality. Collins & Cave (2013, p. 316) suggests that media pluralism is primarily a means to achieving impartiality, but this does not square with the larger body of media pluralism research. As noted at the start of this chapter, some such research focuses on disrupting the dominance of communicative power (Karppinen 2007, p. 18) while also yielding the benefits of diverse media (Valcke, Picard & Sükösd 2015). In the UK, the House of Lords Select Committee on Communications (2014, p. 5) suggests that media plurality is not the goal but the means to an end – that end being informed citizens participating in a functioning democratic system. Their focus is on ways to ensure a diversity of voices and diverse media ownership. However, they also note that these concerns can work at cross purposes and be governed differently. Unlike Collins & Cave (2013), the House of Lords Select Committee on Communications (2014, p. 8) specifically excludes impartiality from the purview of media plurality. New Zealand media have no unified purpose regarding ensuring the availability of public interest media (Ellis & Thompson 2016, p. 37).

1.8.2 Interventions for media diversity

Australia

With the mixed impacts of digitisation and the internet on media diversity, some have observed that Australian regulators have struggled to find an approach to regulation and intervention that advances their stated goal of enriching media diversity (Senate Select Committee on the Future of Public Interest Journalism 2018, p. 1). Changes to media ownership laws have been based partly on responses to increasingly obsolete concerns like spectrum scarcity (Hitchens 2011, p. 222) and the need to offer media outlets facing headwinds in the new media environment a way – via economies of scale – to continue operating. While the closing of more media outlets would constrain diversity, overall Dwyer (2019) contends that the answer is more regulation of ownership, not less. Australia's nearly unrivalled concentration of media ownership has historically worked and continues to work against a pluralistic media environment (Parliament of the Commonwealth of Australia - House of Representatives 2016). Hitchens (2011)), acknowledging the dynamic modern media environments, recommends a rethinking of media regulation and policies to ensure diversity. She suggests removing outdated policies and regulations but also replacing them with alternatives like stronger competition regulation or even direct interventions such as subsidies. A consistent theme among scholars and some commentators is that the media environment is unlikely to fix itself (Dwyer, Martin & Goggin 2011, p. 65.5; Senate Select Committee on the Future of Public Interest Journalism 2018, p. 1), and national systems remain crucial for media governance despite globalisation (Elvestad & Phillips 2018, p. 82; Flew & Waisbord 2015).

Some government approaches appear to have yielded positive results. Debrett (Debrett 2015, p. 563) argues that public service media, most notably the ABC, have been at the forefront of utilising digital and online media to enhance media diversity though these innovations have faced backlash from commercial media. Nettlefold (2017, pp. 107-14)

found that local radio's commitment to diversity of representation, voice, and content has yielded an increase in both public trust and engagement. Given the impact of quality of online access on consumer media choices (Park et al. 2018, p. 67; Screen Australia 2017, p. 3), initiatives including the NBN provide some promise of expanded diversity of sources and content, though there remains a divide for levels of access by region (Park 2017, p. 400). Park (2017) found that this inequality existed on three key levels: the difficulties of physical access to remote consumers, comparative socio-economic status between urban and rural communities affecting ability to pay and participate online, and a lacking skillset resulting from lack of exposure – which leads to further economic disadvantage. According to the Australian Digital Inclusion Index (Thomas et al. 2018, p. 6), rural communities are as disadvantaged in terms of levels of access, affordability, and digital ability as they were in 2014 – though some areas, such as Tasmania, saw improvements and others, like Queensland, saw some deterioration. While digital ability and literacy, according to Thomas et al. (2018, p. 11), has continuously improved, it remains a problem. Affordability and access have in some areas become worse.

International

National governments have claimed varying commitments to diversity. In the US, the Supreme Court has established that the democratic functioning of the US relies on diverse media (Hindman 2007, p. 330). The Canadian House of Commons declared its commitment to providing a space for a diversity of voices, including content in diverse languages and from diverse people (Standing Committee on Canadian Heritage 2017, p. 4). Similarly, the European Union includes media pluralism in its charter of fundamental rights (European Commission 2016, p. 2); however, only two countries in Europe have a policy ensuring people are informed of national media ownership diversity (Craufurd-Smith & Stolte 2014). The House of Lords Select Committee on Communications (2014, p. 8) held a consensus view that media plurality was important. South Africa has no clear and direct policy for media diversity (Duncan 2015, p. 240), while Portugal has a constitutional commitment to ownership diversity that, according to (Sousa & Costa e Silva 2009, p. 18), is consistently ignored when making media policy.

This inconsistent commitment has led to divergent policies to achieve diverse and pluralistic media. In the US, the FCC is focused on making sure people have access to diverse information, but regulates ownership diversity rather than content diversity (Braman 2009, p. 140). It also regulates broadcast media heavily but interacts in only a limited way with other media. South African regulators are concerned that market-driven approaches to diversity will lead to media diversity only for people with money, but have nonetheless mostly taken that path (Duncan 2015, p. 242). New Zealand has few regulations leveraged towards anything but media company growth (Ellis & Thompson 2016, p. 38). However, as seen in section 1.8.1, governments have not settled on a single approach.

The UK Enterprise Act 2002 has a minimum standard for media plurality that can be invoked and, if it is, will prevent ownership consolidation that does not offer 'sufficient plurality' of ownership (Arnott 2010, p. 245). However, according to Arnott (2010), there is no definition or solid indication as to what constitutes 'sufficient', which has led to extensive debate (Gibbons 2015). The plurality test was meant to differ from a more general competition test, but was ultimately amended to focus on competition (Arnott 2010, p. 247).

Rather than seeing diversity and pluralism as overly complicated concepts, however, there is evidence that ambiguous regulation and definition are the result of a lack of political will. Picard (2017, p. 261) notes that media pluralism debates often revolve around which government bodies are responsible for it and at what level rather than whether or not it is important. Additionally, these pluralism policies can intersect negatively with competition, industry, or cultural policies. Similarly, Gibbons (2015, p. 23) points out that, whenever a government does try to administer a specific interpretation of diversity and pluralism, it opens the door to controversy and debate. Worse, Karppinen (2018) finds that pluralism arguments are often employed to support conflicting media policy agendas. However, Gibbons (2015, p. 25) points out that this does not need to be the case; many of the subjective judgments required to assess and support pluralism have already been made in other media policies, giving precedence, and that answers can be found if the questions are made more specific, such as answering sufficient pluralism *for what purpose?* Helberger (2011, p. 447) suggests that deciding this purpose is important for choosing the right approach; if governments want to cultivate a 'marketplace of ideas', for instance, they need to increase the level of media literacy whereby consumers access it, where relying on consumers' personal autonomy means legislating against manipulation and involuntary path dependency.

A lack of clear definition of news media or pluralistic media has also made media pluralism challenging to assess, though some groups have made progress. Indeed, Polyák (2014)) points out that, while there has not been consensus on what constitutes success, assessments continue to be conducted frequently. According to Craufurd-Smith & Tambini (2012, p. 40), empirically-grounded media pluralism policy choices in the UK will remain elusive until reliable empirical measurements are available. Craufurd-Smith & Tambini (2012, p. 62) also emphasise that clarifying objectives is crucial for making progress in UK media pluralism policy. The UK House of Lords Select Committee on Communications (2014, p. 19) suggests that any government assessment and action towards media plurality be focused on consumption rather than access. The Canadian House of Commons recommends codifying a diversity of voices test in media regulation (Standing Committee on Canadian Heritage 2017, p. 58). Foster (2012, p. 8) considers digital intermediaries an essential part of the debate about how to gauge and promote media pluralism, and interventions, such as threatening their access to the UK market, need to be raised as options.

While these recommendations are diverse, they are not mutually exclusive, and reconciling international approaches could lead to comprehensive assessments. One such example is Europe's Media Pluralism Monitor (MPM), which evaluates the status of a broad range of diversity concerns – along the lines suggested by Napoli (1999) – through qualitative and empirically grounded quantitative risk assessments (Brogi et al. 2018). The MPM ties together risk analysis and media policy through an evidentiary-based approach (Valcke et al. 2010, p. 86).

It is useful to important to see the MPM as a different type of tool from the FCC's now defunct Diversity Index. Napoli (Napoli 2015, p. 147) discussed how this previous attempt to measure diversity was abandoned after a court challenge to the FCC's exercise of its powers. The MPM offers much more comprehensive measures and its primary function is as an assessment tool, where the Diversity Index provided a test for media mergers, as the MPM used the Diversity Index's benefits and ultimate failure to develop an improved approach. The media plurality test from Ofcom (2015, p. 15)

similarly benefits from surveying the broad variety of approaches available, though it is, like the Diversity Index, largely a test for media mergers. Ofcom (2015, p. 1) focuses on diversity of voices and diversity of ownership in assessing media pluralism, using measures of availability, consumption and impact (Ofcom 2015, p. 5). Availability is determined through a count of providers, where consumption includes reach, share, and multi-sourcing. Impact is assessed through the consumers, who assign media personal importance and perceived impartiality.

Even with the challenges of assessing media pluralism and diversity, some countries have blocked significant media mergers. The New Zealand Commerce Commission declined a merger of Fairfax New Zealand and NZME Limited owing, in part, to the impact on diversity (Berry & Spittle 2019, p. 101). The decision was based on the merger's impact on quality and plurality and was upheld on appeal. The High Court of New Zealand observed that media plurality was of importance to the community. There was also a concern that such a merged organisation would have had unrivalled media dominance (Myllylahti 2018, p. 52).

The Australian Research Council-funded Media Pluralism Project at University of Sydney and University of Technology Sydney is developing a metric for online news consumption. It is testing existing policy approaches to media pluralism against a series of innovative news practices.⁵

While assessment remains elusive, interventions have broadly been recommended and they fall into several categories. One of the most consistent recommendations was for legislative and regulatory clarity. The Canadian Public Policy Forum (2017) made updating and clarifying media laws one of its key recommendations, including both economic elements like tax law and publisher rights. Similarly, Craufurd-Smith & Stolte (2014, p. 6) recommend governments make explicit their recognition of the importance of media pluralism and ownership transparency. To Burri (2016, p. 332), the key is that public policy interventions, be they for ownership and control decisions or direct financial support, need to be various but individually small-scale – a 'nudge'. Options include updating existing media policies to include all media as well as to increase the role of public service media as an intermediary, helping consumers choose.

However, given the ongoing challenge to not only prevent further damage to media pluralism but also to enhance it, some proposals involve direct financial intervention. The Canadian House of Commons recommends directly funding media to aid with digital transition, particularly regional and ethnic media (Standing Committee on Canadian Heritage 2017, p. 40). South Africa has, however, established an agency, the Media Development and Diversity Agency, to directly subsidise diverse media, though it remains largely underfunded (Duncan 2015, p. 243). Relying on competition law has resulted in diminishing media diversity in South Africa (Duncan 2015, p. 246), though community media initiatives have flourished. Collins & Cave (2013, p. 317) suggest that the UK may need to introduce subsidies and other direct financial interventions to help ensure the presence of a pluralistic media system, though they have proven hard to pass. The Department for Digital Culture Media and Sport (2019, p. 7) suggests that government intervention to ensure diversity and that the continued provision of

⁵ This research (*Media Pluralism and Online News*) is funded by the Australian Research Council under a Discovery Project grant. The Chief Investigators are Tim Dwyer, Derek Wilding, Saba Bebawi and Jonathan Hutchison. More information is available at: <https://mediapluralism.org.au/>.

journalistic content in the UK 'may be the only remedy'. These interventions can include support for media literacy, legislation clarification, or direct subsidy.

Finally, significant attention has been drawn to the role of public service media in providing valuable diverse media content. Ellis & Thompson (2016, p. 39) laud public service broadcasters like the ABC and BBC and suggest creating a levy to fund public interest journalism in New Zealand, as it is becoming clear that the market has no apparent incentive to produce it. New Zealand attempted to establish a public broadcasting service (RNZ+), but a commercial broadcaster campaigned against it, warning that it could put existing broadcasters out of business (Myllylahti 2018, p. 39), and the government eventually backed down. The only public media service in New Zealand is in radio, RNZ, and it has experienced enduring and increasing success (Myllylahti 2018, p. 47).

In Canada, the Public Policy Forum (2017) recommends removing advertisements on Canadian public broadcasting and making up the difference with direct funding, to enhance the broadcaster's function as a provider of public interest media content. In a large international study of 48 countries, Humprecht & Esser (2018, p. 1829) found that media diversity correlated strongly with robust public service media, which raised the level of diversity in the whole media system.

As in Australia, though, there are some who disagree with the contribution of public service broadcasters to media diversity. While some argue the diversity benefits of having public service media, Collins & Cave (2013, p. 315) point out that the BBC service dominates reach and share of reference in UK media, notionally a poor result for diversity of sources. Commercial producers claim that having the BBC online and everywhere for free creates obstacles for other news brands that would seek to recoup lost advertising revenue with paywalls, but research has not found this to have an impact on consumers' willingness to pay (Department for Digital Culture Media and Sport 2019, p. 52). Craufurd-Smith & Stolte (2014) and Public Policy Forum (2017) both emphasise that non-government organisations can play an important role in supporting media diversity, and Craufurd-Smith & Stolte (2014, p. 7) suggest it should be partly the responsibility of the media organisations to make sure consumers are informed; however, both do still couple this advice with support for strong public service media.

1.9 Standpoint Diversity

Emeritus Professor Andrew Jakubowicz, Professor of Sociology at UTS

The ecology of Australian media reflects the specific history and societal makeup of its multicultural and indigenous populations. In a democratic society with this history, news and current affairs operates in an environment of many standpoints (Cottle & Rai 2007).

However, the scholarly literature that reviews the standpoints that dominate media ecology suggests that only some standpoints are given value and presented regularly, standpoints that represent majority assumptions (Avieson & McDonald 2017).

The effect of this marginalisation of diverse standpoints can be to undermine the right to communication that the media in democratic societies are thought to satisfy. Our review of news, current affairs and diversity of standpoints encompasses culture, Indigeneity, gender, sexual orientation and disability.

1.9.1 Culture

Australia defines itself as a multicultural society (Jakubowicz 2018). In effect, this means that social institutions should ensure that access and equity pertain for all Australians irrespective of their cultural background, while also taking into account their cultural backgrounds (Gozdecka, Ercan & Kmak 2014). The key concepts link care not to exclude with affirmation of inclusion. The communication and information needs of culturally diverse Australians therefore should be met both from within the media of their own cultures (Jakubowicz 2015), and from the majority or mainstream media in recognition of the legitimate diversity of cultures. Media play a key role in the social cohesion that underpins national policy (Jakubowicz 2009; Markus 2015).

The diversity of cultures also implies a diversity of languages spoken and comprehended. Over the past two decades, studies of culturally diverse audiences and their news consumption have demonstrated that many ethnic minorities feel alienated from the mainstream media in Australia, but not only because of language barriers. Rodrigues and Paradies (2017) used their own survey data to propose that this increasing alienation has driven minority audiences (people from diverse cultural backgrounds) away from the mass media and Australian mainstream news services, towards online and social media sources.

They point to a dual phenomenon – that poor representation of minorities in mainstream media stories drives those groups away from mainstream media, while this same poor representation contributes to a worsening of relations between cultural communities. Essentially, social cohesion and an effective democratic polity depend on an accurate and essentially validating representation of ‘the other’, whether that ‘other’ be majority Whites for minorities, or the reverse (Rodrigues & Paradies 2018).

A collection of recent studies about minorities and the media in Australia (Budarick & Han 2017b) examines not only how minorities feel about their perceived marginalisation by the mainstream media and their stereotypical representation, but also how they push back against this sense of marginalisation through their own community media and online communication networks. The editors in their introduction (Budarick & Han 2017a)

propose that the mainstream media have to an extent failed in their responsibilities to 'inform, enlighten, question, imagine and explain' (p.6) the dynamics of multicultural societies to its own members, a crucial task as the complexity of Australian society increases. Moreover, in their detailed review of the literature, Ewart and Baird note that the news representation of minorities operates not only on the basis of stereotyping and misrepresentation, but also through the 'absences' that characterise mainstream news coverage (Ewart & Beard 2017). In the period when media was dominated by nationally located broadcasting and print organisations, ethnic minorities had little choice outside community FM radio and ethnic language print. However, with the spread of online, satellite and digital media a variety of sources are available. This diversity may have the very real effect of tying ethnic minorities into their position in global diasporas fed by the metropolitan centres' media, while fragmenting the relations between communities within Australia. The idea of a national conversation, so critical to multicultural democracies, becomes increasingly difficult to sustain.

1.9.2 Indigeneity

There is widespread agreement among scholars that the media representation and provision of news and information about and to Aboriginal and Torres Strait Islanders Australians has not been to their benefit (Latimore et al. 2017). In discussions of the Indigenous Public Sphere, attention has been paid to way in which discourses that reflect Indigenous experiences are generated and then modified if not traduced by non-Indigenous media (McCallum, Waller & Dreher 2016; McCallum, Waller & Meadows 2012). Meadows has paid particular attention to the importance of Indigenous creativity and production of news and storytelling, and the role of Indigenous news media in building an Indigenous national conversation as well as supporting local interactions (Meadows 2015).

Indigenous audiences consume a lot of Indigenous media, with up to two-thirds of the sample in a recent survey having watched Indigenous TV in the previous week – highest in remote areas (Research 2014). The main reason (equal to music listening) given for listening to Aboriginal Community radio was to access the Indigenous focus in news and current affairs (McNair Ingenuity Research 2016).

As the spread of digital media increases the opportunities for own-culture interaction, Indigenous people also have discovered the dangerous spaces opened up on the Internet, and the threats of racist discourses that are aimed at harming them (Banerjee & Osuri 2000). Thus a recent study of cyber racism in Australian reported the experience of Indigenous Internet users, who had withdrawn into protected spaces after their exposure to racist harassment on sites such as news organisations comments pages (Jakubowicz et al. 2017). There is increasing evidence that the spread of anti-Aboriginal racism through the Internet, especially in the comments areas of news organisations, but also more widely through social media, has had a significant harmful impact on the self-image of Indigenous Australians. Particular pressure has been placed on Aboriginal youth, whose suicide rate has been increasingly dramatically, in part as a consequence of encounters with humiliating and hurtful racist content (Campbell et al. 2016; Paradies 2006; Paradies 2017).

1.9.3 Gender

The research into gender and media news and current affairs has revealed biases and under-representation on many fronts. In approaching issues of gender fairness and equality, researchers have addressed issues of women's presence as producers of news, women's issues as a focus for news stories, and the experience of and attitudes of women as audiences for news.

A survey report by Women in Media has argued that women are under-represented throughout the news media, leading to the wider disempowerment of women's perceptions and aspirations (Women In Media 2016). The under-representation of women as sources of expertise in the news industry skews the sense of issues (Hart & Gilbertson 2018) and the range of inputs available to news audiences (Mullins 2016).

More recently, in the wake of a worldwide controversy regarding women in the media industry, known as the #MeToo movement, Australian women have addressed the issues of exclusion, exploitation and marginalisation. In their discussion for the Women's Leadership institute, two Sydney researchers have argued that the aspirations of women are thwarted by the media reality that suppresses their presence and roles in, especially, news media (Price & Payne 2019).

Women as consumers of news are less likely to pay for it online, compared with men. They share a general and rising concern about fake news, and the difficulty they have as consumers in determining whether the news they consume is true (Fisher, Park, et al. 2019).

Some researchers have addressed questions of intersectionality, where gender combines with other dimensions of difference to increase the intensity of marginalisation from all forms of news media involvement. Minority group women have particular issues in terms of 'othering' by news media – as stereotypes, as excluded from employment, and as 'abandoned' audiences (Hebbani & Wills 2012; Syed 2007).

1.9.4 Sexual orientation

While sexual orientation has become a more normalised part of news media environments, people with diverse sexualities continue to face issues concerning access across the news media, as producers, sources, workers, and audiences. Similarly to other categories of difference, sexuality tends to be forgotten unless foregrounded as a news item associated with scandal or celebrity. As ethnic and Indigenous people are often reported in news when they represent a threat to the mainstream social order, so too people of diverse sexual orientations enter through the framework of 'the other', rather than as normalised members of the national conversation (McKinnon, Gorman-Murray & Dominey-Howes 2017).

Given the role that the news media place in reporting on social and political attitudes and valorised identities and behaviours, young gay people may find that the news media intensify their sense of otherness and marginalisation (Robinson et al. 2014; Willis 2012). Thus the news that gets reported and the form in which it is conveyed contributes to a milieu in which stigmatisation can have profoundly destructive effects on mental health (McKinnon, Gorman-Murray & Dominey-Howes 2017). Alternative gay media may

provide a refuge and an alternative space in which sexual identity can be revalidated by peer support and narratives of authenticity.

1.9.5 Disability

Disability provides one of the greatest challenges on all levels to inclusion in news and current affairs. Researchers have used an analytical frame for people with disabilities as producers, creators, narratives and consumers of news and current affairs, allowing them to drill down into the media industries.

A major study of disability and media in its focus on news reported that the practices of news actively 'disabled' people with disabilities. The news did so through its persistent representation of disability as a sphere of victimhood or heroism, not a normal dimension of a modern complex society (Ellis & Goggin 2015). Moreover in intersectional analyses of disability and race, researchers have pointed to the progressive intensification of prejudice through media scapegoating and stereotypes (Gilroy, Ragen & Meekosha 2017).

Most research on disability and media especially in news, indicates that the active involvement of people with disabilities in news production will have a significant impact on the transformation of content, perspective and relevance (Pearson, Trevisan & Society 2015). Given the often greater dependence on electronic news for a sense of the world in which they live, a more perceptive and sensitive news-making environment would have both societal and industry benefits (Jakubowicz 2003).

1.10 Gaps

The gaps in research can be grouped into those relating to availability, content, consumption and attitudes.

Availability

- There is no mapping of the contemporary media market so that sources of news and current affairs beyond the regulated platforms can be identified and accounted for. This would include online media, but also more well-established sources such as the news produced for Australia's culturally and linguistically diverse communities, community broadcasters, Indigenous media etc.
- The lists of top 20 news websites are missing a proper consideration of aggregators (for example, one list includes Apple News but not Google News). There is also no related charting of the levels of news and current affairs on platforms like YouTube.
- There is no study of the effects of cross-media mergers, comparing the amount of original journalism pre-merger to the amount post-merger; whether content changes; and whether audiences perceive any change.

Content

- There is no systematic tracing of program and content supply arrangements within and between media groups in order to understand the range of content available or the range of viewpoints offered in this content.
- There is no analysis of the type of news ('hard news' or 'soft news'; reporting or opinion; politics or crime or science etc).

Consumption

- Australian usage data provides valuable insights into the diverse ways in which the public are accessing certain sources of news media, but international research problematises the results significantly. The Ofcom qualitative studies in particular (Ofcom 2018a, 2018d, 2019a, 2019b) demonstrate that the narrative painted by quantitative usage and survey data may be poorly representing the desires and behaviours of consumers. Kennedy & Prat (2019, p. 14) point out that broad content categories like 'political news' fail to show how these genres can be internally stratified, with investigative journalism undifferentiated from political gossip.
- Specifically, there is no analysis of how the content generated by Australia's news producers is accessed (e.g., via terrestrial television, catch-up, news website, digital platform); how users recognise the source – for instance, Pew Research Center (2018b, p. 14) found that older Europeans were less likely to know the source behind the news they consume of social media; and how it is used by consumers (e.g., the frequency with which this content is accessed) or whether the ways in which people report their media use is consistent with how they do, in practice, access news. On this last aspect, qualitative research by Ofcom (2018d, p. 13) find that that self-reported media use diverged significantly from use in practice.

Attitudes

- What is known of current consumer attitudes towards media diversity in Australia largely comes from one source: a single question asked by Roy Morgan in research commissioned by the ACCC which foregrounded digital platforms. The responses to this question suggest consumers are not so concerned with diversity, as with factors like convenience.
- Given media literacy rates appear quite low, it is not clear what consumers understood by the Roy Morgan question: did they give this response knowing the concentration of ownership levels in traditional media or in the top 20 news websites? Even if they did, would that concern them if they feel that they have access to a range of different opinions about current events? Has there been a change over time so that digital media really does provide the content that answers diversity concerns?
- Similarly, there is no Australian equivalent of the research in Canada conducted which asked respondents if they felt democratic societal functions would be threatened if some types of media were to disappear (Public Policy Forum 2017, p. 41).

2 Localism

2.1 The research questions

- What levels and types of local coverage exist in the news and journalism Australians have access to? How does this change across platforms and by geographic area?
- Have changes in the media environment since the rise of digital media had an impact on the amount and type of local news Australians receive?
- What do consumers understand local news to mean? How important is local news to them? What types and on what platforms?
- What levels and types of local news coverage do consumers see as essential for the public interest?
- What kinds of local news do consumers access?
- Do current levels of local content satisfy community expectations (consumers expectations of their own news consumption patterns as well as what they want news to deliver more broadly)? What types and on what platforms?
- Do consumers think that commercial publishers/broadcasters should be required to provide local news?
- What are the appropriate geographic areas and scales when considering local news? How does this change depending on the characteristics of the local area (e.g. population and density)
- Are factors other than geography important in determining what local news content should be available? If so, what are they? (e.g. relevance of content depending on characteristics of the area: rural, suburban, inner-city, etc.)
- How important is diversity in sources of local news – which aspects are most important?
- Should news intended for a local audience be subject to the same regulatory framework as national news?

2.2 Key findings

Our review of research shows that Australians have a strong appetite for local news but it is not clear how well they are being serviced given the current restructuring of the market. Some specific findings from both the local and international literature are set out below.

- ACMA-commissioned research in 2013 and 2016 has found that local news is highly valued in regional Australia. There is also good evidence of the use of local news. While television is found to be the platform nominated by regional news consumers as their main source of news (46%) (Fisher, Park, et al. 2019, p. 26), local newspapers are found to be the most common source of local media in regional areas (ACMA 2013; ACMA 2017a, p. 10). A 2017 survey of Australian radio listeners also found that 76% of regional listeners agreed that radio was key to keeping up-to-date with community events (GfK 2017).
- Research shows that rural news consumers' access to regional and local newspapers is higher than the national average at 32% compared to 23% (Park et al. 2018, p. 54).
- A difference between the 2016 and 2013 ACMA research is the percentage of regional Australians who report having access to all the local content they want. In 2013 this proportion was 91%; in 2016 it had dropped to 78%. The reasons for this difference are unknown. Research does note that this was a period of heavy cutbacks and closures of commercial, public and community regional media (ACMA 2017a; Carson et al. 2016; Freeman, Hess & Waller 2017; O'Shea 2019; Simons et al. 2017; Zion et al. 2016). In regional TV news, ACMA reported an overall decline in viewership of weekday evening news services in 2006-2016 (ACMA 2017c, p. 7).
- Despite these changes in the environment, there has not been a comprehensive study of this changed mediascape and its impact on public interest local news (Simons et al. 2017, p. 1402). This is in contrast to the US where it has been said that there was a net loss of 1,800 local newspapers since 2004 (Abernathy 2018, p. 6) and in the UK, where the *Digital News Report 2019* highlights Press Gazette research showing the net closure of 245 local news titles in the last 13 years.
- Use of social media for local news is increasing: the biggest increase in usage (20%) between 2013 and 2016 in the ACMA consumer survey data was 'social media with local content'. This correlates to the data collected by the Centre for Media Transition, which found almost two in five regional news consumers gain local news from social media at least once a day. For more than two-thirds, it is at least once a week (Fray 2018, p. 2).
- The research marks out two specific functions of local news: contributing to community building and the local watchdog role. There have been several qualitative studies investigating both these roles. For example, in a study involving interviews and focus groups with readers of regional newspapers, Hess found that local newspapers consciously and unconsciously foster collective affinity to a specific geographic area for those who live there and beyond (2015, p. 486). Other regional case studies (Richards 2013; Bowd 2011; Meadows 2015; Nettlefold 2017, p. 293) emphasise the importance of regional media to local residents. One study gives mixed results on the use of local media in suburban Sydney (Muscat 2018). It has been found that many regional consumers nominate negativity as a problem with

news media (Fisher, Park, et al. 2019, p. 115); it is possible this is a manifestation of the importance attributed to the community building role by regional audiences.

- Internationally, in the US Wenzel (2018) points out the community-building role of local media in an increasingly polarised US society while extensive, nationally representative Pew Research from 2019 pointed out the community value ascribed to local news: 'those who say journalists are in touch with their community are 31 percentage points more likely to say their local media do a good job of dealing fairly with all sides – 73%, compared with 42% among those who say their media are out of touch' (Pew Research Center 2019, p. 6).
- The second type of local news – watchdog news – is the subject of research that questions the performance of local media in recent years (Simons & Dickson 2019). This study involving respondents in council media departments found that almost a third of councils report that no journalists attend local government meetings. A separate, qualitative case-study analysis (Carson et al. 2016, p. 137) found that civic leaders' contact with journalists and use of the media for public engagement had diminished over time.
- There is evidence that hyperlocal media is emerging around the country. This includes examples from the case studies in ACMA's research (ACMA 2017a). Offline and online hyperlocals have focused on community cohesion. It has been observed that 'There is no doubt that while human interest news has a future in rural communities, hard news reporting and the future of newspapers are at risk while these sources are viable for human interest stories (O'Shea 2019, p. 59).
- In terms of what counts as 'local', ACMA's research between 2013 and 2016 found that there was a significant increase in people defining 'local' as their region, compared to 2013 when most people defined local as their town. It has been said that one of the ways in which regional media has adapted to the current environment is by merging services (Bowd et al. 2017; Simons et al. 2017; Zion et al. 2016), and that newspapers aimed at specific rural and regional towns and cities are now filling their pages with syndicated and shared copy.

2.3 Definitions

Current affairs: As noted in the Introduction, this report does not seek to define ‘current affairs’ or ‘news’ in general, but an indication of the distinction between the two can be seen in the definition of ‘current affairs program’ (for the purposes of regulating disclosures of sponsorship arrangements in commercial radio) in s 4 of the Disclosure Standard, as follows: ‘a program a substantial purpose of which is to provide interviews, analysis, commentary or discussion, including open-line discussion with listeners, about current social, economic or political issues’.

Local: Local is a flexible term and used differently in different contexts. Some research also suggests that what is defined as local may change with what media people are consuming as ‘local’ media (Park cited in Nielsen 2015, p. 55) – an analysis consistent with seminal sociological theory around the role of media in constructing imagined communities (Anderson 2006). As noted in section 2.7.2 local may not be an issue of simple geography with other factors including indigeneity, political boundaries and stigmatisation, influencing how communities define themselves. Finally, ‘local’ is defined for the purposes of broadcasting regulation and this definition is not always congruent with the academic literature. Under the Broadcasting Services (Meaning of Local) Instrument 2018, news bulletins, weather bulletins, community service announcements and designated local content programs are ‘local’ if they relate to the licence area of a regional commercial radio broadcasting licence (e.g., Albany in Western Australia or Albury in New South Wales). It should be noted that content that does not originate locally may still be local for these purposes if it is highly relevant to the local community – such as stock prices.

While ‘local’ and regional’ are subject to interpretation, in order to provide for consistency within this report, variations on ‘local’ are used, as follows:

Local media: This term will be used to indicate any media which defines its audience as belonging to a specific community (village, town, suburb, region, city) and not generically as citizens of a state or nation. Large metropolitan papers, despite nominally belonging to one particular city, are excluded from this definition due to the fact they address multiple overlapping communities.

Hyperlocal media: According to (Stúr, Jangdal & Nilsson 2018, p. 88):

The term hyperlocal describes independent online local news sites. Radcliffe (2012, p. 6) defines hyperlocals as ‘online news or content services pertaining to a town, village, single postcode or other small, geographically defined community’. The most common topic covered by hyperlocals relate to community activities, local councils and the services they provide.

However, this definition is limiting. While there is no doubt that the advent of digital technologies has provided opportunities for hyperlocal news to flourish, hyperlocals in Australia can and do exist in analogue versions. There is also a wide variety of hyperlocals both in scope and professionalism.

Regional media: Refers to media servicing multiple smaller communities, often based out of a larger regional town. Broadcasters or publishers of this type may also act as a head office of ‘hub’ from which smaller local outlets are operated and they will generally share syndicated copy.

Suburban media: Generally taken to mean newspapers or community radio distributed or broadcast over a smaller metropolitan collection of suburbs. However, academic Tanya Muscat has recently argued (section 2.4.2) that metropolitan TV news should be seen as local media, in particular as a form of suburban media as this is the target audience.

Remote communities: The Australian Bureau of Statistics defines remoteness by relative deprivation of services and this also holds true in terms media services. Remote communities should also be noted for their reliance on agriculture, more time spent in travel and being home to many first-nation communities.

2.4 Local news practices

2.4.1 Levels and uses of local news

Access to, and use, of local news in Australia

Local news services, particularly papers in regional Australia, have suffered cutbacks and closures as they have been hit by changing ad revenues (Fray 2018, p. 2). However, unlike the US, there has not been a comprehensive study of this changed mediascape and its impact on public interest local news (Simons et al. 2017, p. 1402). ACMA's 2017 package of research on local content in regional areas,⁶ including the case studies, remains the best overview of the Australian media environment. Regional Australia initially weathered the large-scale media contractions seen in metro news – until 2014-2015 (Zion et al. 2016).

As Figure 2.1 shows, ACMA's 2016 research on regional Australians' access to local content (ACMA 2017d) records a drop of more than 10 per cent in the frequent use of print newspapers for local content in regional Australia. In some respects, it could be argued that the drop-off in print usage is offset by the take-up of online as below:

⁶ Available at <<https://www.acma.gov.au/theACMA/Library/researchacma/Research-reports/local-content-in-regional-australia-2017-report-regional-report>>.

Figure 2.1 ACMA research on frequent access to local content

Change in frequent use of media to access local content (%)		
	2016	2013
Commercial TV	80	83
Local print newspaper	71	82
Commercial radio	74	67
Local ABC radio	61	63
Community radio	49	47
Social media with local content	83	63
Websites with local content	62	52

Q9. For each of the following sources, how often do you access any type of local content from it? Weighted base: all regional Australians who are aware a particular media type provides local content in their area.

Source: Data files published by ACMA along with its 2017 report, *Regional Australians' Access to Local Content – Community Research* available at:

<https://www.acma.gov.au/theACMA/Library/researchacma/Research-reports/local-content-in-regional-australia-2017-report>.

However, the drop in print usage has also coincided with an overall drop in consumers reporting that they are seeking local news, local community events and local sport:

Figure 2.2 ACMA research on regional Australians seeking local content

Proportion of regional Australians who seek local content (%)		
	2013	2016
Local news	84	73
Local weather	85	85
Local community events	72	66
Local sport	51	40

Q6. Do you personally ever seek information about...?

Source: Data files published by ACMA along with its 2017 report, *Regional Australians' Access to Local Content – Community Research* available at:

<https://www.acma.gov.au/theACMA/Library/researchacma/Research-reports/local-content-in-regional-australia-2017-report>.

Looking at Australia as a whole, and looking at local news compared to other types of news, when asked which brands consumers had accessed in the last week the *Digital News Report 2018* showed 23% of adult Australian news consumers had accessed some form of local newspaper. It also showed rural news consumers' access to regional and local papers was higher than the national average at 32% (Park et al. 2018, p. 54). The difference between urban and regional uses of local papers may be related to the loss of quality suburban press (Simons & Dickson 2019, p. 8). In 2019, the overall percentage (national average) that had accessed a local paper had fallen 3 percentage points to 20% (Fisher, Park, et al. 2019, p. 31). In 2019, a breakdown between urban and rural access to local news was not provided.

In terms of regional TV news, ACMA reported an overall decline in viewership of weekday evening news services between 2006 and 2016 (ACMA 2017c, p. 7). This decline in average audience numbers is most pronounced in NSW (see figure 2.3 below).

Figure 2.3 Comparison of combined average news audiences by market, 2006-15 and mid 2016

Market	Av. AUD	Av. AUD	Av. AUD change		Av. AUD
	2006	2015	2006 v 2015		mid-2016
	n	n	n	%	n
QLD	795,000	628,000	-167,000	-21	605,000
NNSW	650,000	428,000	-222,000	-34	407,000
SNSW	714,000	446,000	-268,000	-38	428,000
VIC	534,000	407,000	-127,000	-24	393,000
TAS	214,000	151,000	-63,000	-29	142,000
WA*	195,000	152,000	-43,000	-22	159,000

Source: Regional TAM data, Average audience across weekday evening news services, 2003 – June 2016, Consolidated 7.

Notes: Average audience data for Ten News are not available for 2003–05, so total news audience has been compared using 2006 figures. Figures used are a manual calculation and have been expressed to the nearest '000. Additional local TV news services began in QLD in 2011 and 2015, and TDT began in TAS in 2008.

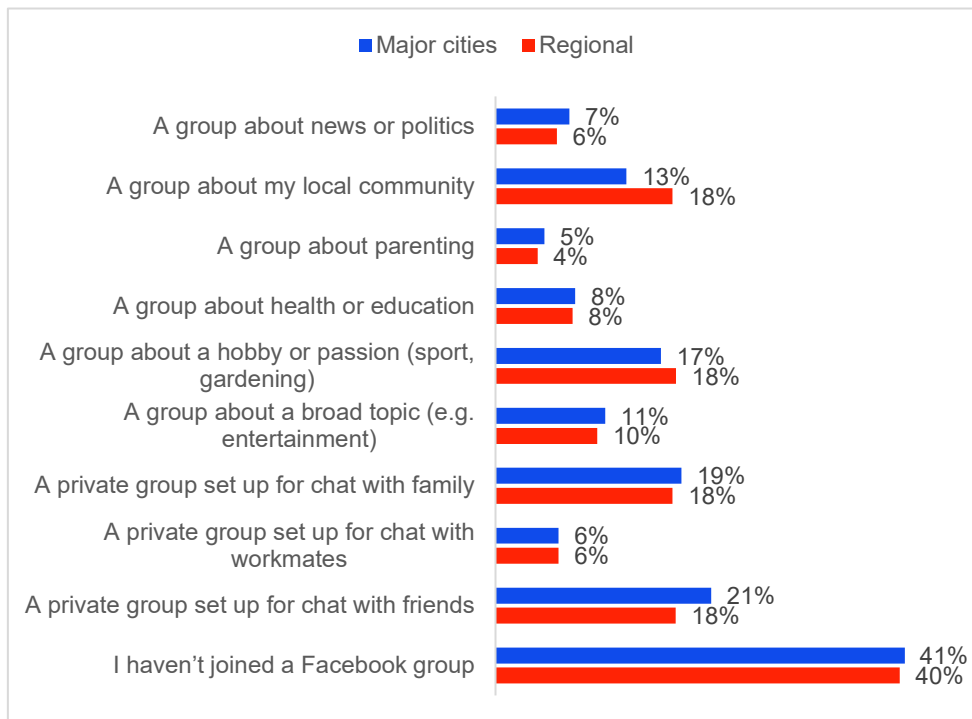
*2010 data used instead of 2006 used for WA.

Source:(ACMA 2017c, p. 7)

Nearly half of Australian community radio listeners in a CBAA-commissioned survey cited local news and information as a key reason for tuning in (McNair yellowSquares 2017, p. 38; McNair yellowSquares 2018, p. 8). In a representative sample of people who listen to community radio in an average week, 47% said they did so for the local information and news content (McNair yellowSquares 2018, p. 42). This figure is higher for non-metropolitan listeners, for which local information and news is the most cited reason for listening to community radio (61%), compared to metropolitan listeners (40%) (McNair yellowSquares 2018, p. 43). This difference between non-metropolitan and metropolitan listeners may be due to the localised nature of community radio, and Australian community radio listeners' access to other media in their area (McNair yellowSquares 2018, p. 43).

The biggest increase in usage between 2013 and 2016 in the ACMA consumer survey data (see Figure 2.1 above) was 'social media with local content' (20% increase). A survey conducted for the Centre for Media Transition in 2018 found almost two in five regional news consumers gain local news from social media at least once a day.⁷ For more than two-thirds, it is at least once a week (Fray 2018, p. 2). Separate Centre for Media Transition commissioned research on regional media usage based on the same sample used for the *Digital News Report* shows that when asked which Facebook and WhatsApp groups they belong to, regional consumers are more likely to use group chat to connect to their local community – a role that might in the past have been performed by local media – than to connect to a group about news or politics (Fisher & Park 2019). This is shown in Figure 2.4 and 2.5 below.

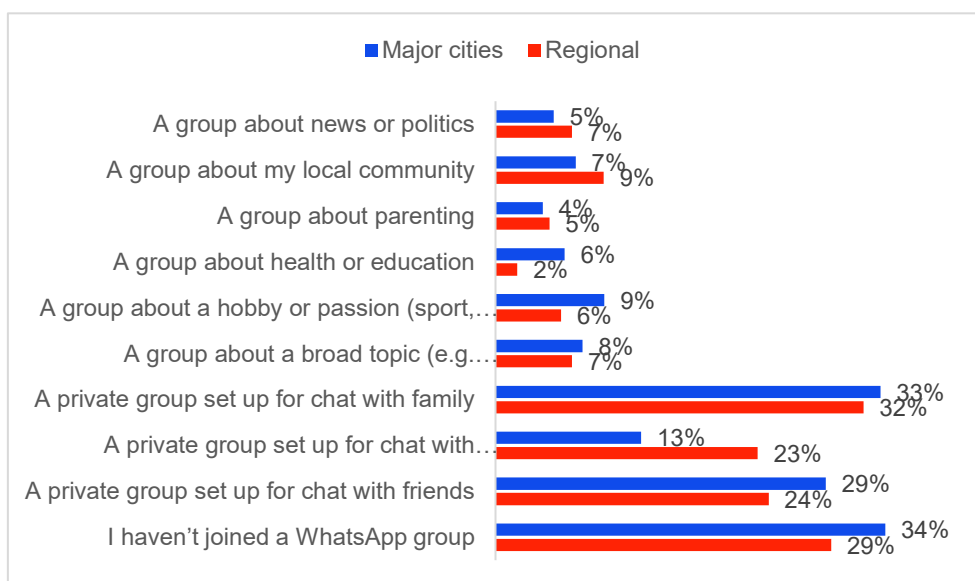
Figure 2.4 Facebook groups by region (%)



Source: (Fisher & Park 2019)

⁷ The sample was of 266 respondents in regional Australia. It was representative of the broader Australian population residing in regional and rural areas in terms of age, gender, wealth segment and state/territory, with an approximate margin of error of +/- 3.6%.

Figure 2.5 WhatsApp groups by region (%)



Source: (Fisher & Park 2019)

Interestingly, when considering local content by age demographic, ACMA’s data (ACMA 2017b) shows differences in the type of content sought, with ‘local news’ varying depending on age: as Figure 2.6 shows, 61% of 18-24 year olds sought information about local news, but 79% of 40 to 54 year olds did so. There is a more marked difference in the category of community events, where only 50% of 18-24 year olds seek this information, whereas 75% of 25-39 year olds and 73% of 40 to 54 year olds do so.

Figure 2.6 ACMA research on seeking local content by age (%)

Seeking local content by age (%)					
	18–24	25–39	40–54	55–64	65+
Local News	61	76	79	76	70
Local Weather	80	88	91	87	75
Local Community Events	50	75	73	67	56
Local Sport	34	43	46	41	35

Q6. Do you personally ever seek information about...?

Source: Data files published by ACMA along with its 2017 report, *Regional Australians’ Access to Local Content – Community Research* available at: <https://www.acma.gov.au/theACMA/Library/researchacma/Research-reports/local-content-in-regional-australia-2017-report>.

The data does not show a huge age variation when it comes to perceived accessibility of local content across different sources (see Figure 2.7). ABC Local radio is the biggest outlier; younger audiences in regional Australia (like other audiences in that age group,

including remote Australians (ACMA 2017b) may be more likely to listen to Triple J on FM radio. In future surveys, it may be useful to add online and social media categories.

Figure 2.7 ACMA research on most common sources of local content by age (%)

Most common sources of local content by age (%)					
	18– 24	25– 39	40– 54	55– 64	65+
Commercial TV	66	66	73	75	77
Local print newspaper	83	87	89	91	88
Commercial radio	72	76	80	71	65
Local ABC radio	43	48	57	63	61

Q8. Which of these sources provide local content in your local area?

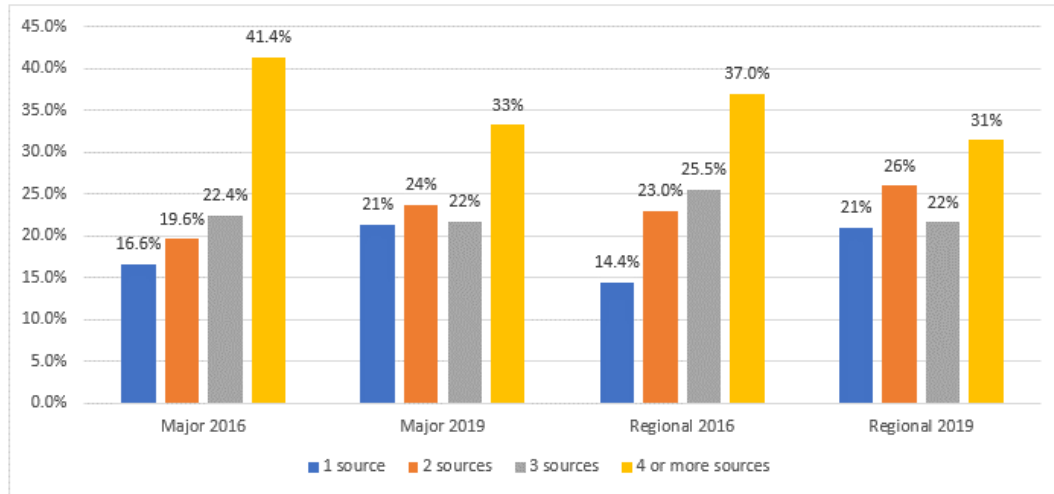
Source: Data files published by ACMA along with its 2017 report, *Regional Australians' Access to Local Content – Community Research* available at:

<https://www.acma.gov.au/theACMA/Library/researchacma/Research-reports/local-content-in-regional-australia-2017-report>.

However, there is an age variation when it comes to use of social media. Use of social media as a source of local news is higher among regional Australians aged 18 to 24 (31%) and 25 to 39 (33%), and lower for those aged 55 to 64 (9%) and those aged over 65 (4%) (ACMA 2017a, p. 12).

The greater use of digital platforms does not seem to have led to a greater number of sources being accessed in regional Australia. In fact, Figure 2.8 below, from research commissioned by the Centre for Media Transition, shows the opposite, with the number of news consumers accessing four or more sources going down in both urban and regional centres (Fisher & Park 2019). These figures are not specific to local news and it is not known whether this is the result of the loss of local sources of news, or whether it might be related to reported growth in news avoidance (Fisher, Park, et al. 2019, p. 33)

Figure 2.8 Number of news sources accessed in major and regional towns 2016 and 2019



Source: (Fisher & Park 2019)

Suburban news availability

Simons & Dickson (2019, p. 8) states that there is a 'clear country/city divide' when it comes to the ABC providing local news in urban areas.

Almost seventy percent of metropolitan LGAs stated that the ABC did not provide local news, compared to just 20 per cent of regional and rural LGAs. This highlights the importance of suburban papers – the same newspapers that are being amalgamated or closed – as a source of news in the suburbs. However, it is clear that even in rural and regional areas, there are perceived gaps in the ABC's ability to provide local news.

According to the *State of the Regions Report: Availability of Local News and Information* upcoming research by Simons and Bosland will also conclude that 'Court reporting, in particular, is in decline... Suburban and regional magistrates' courts are rarely reported'.

Access to, and use, of local news internationally

As demonstrated by the country profiles in the *Digital News Report 2019* (Newman et al. 2019), globally, consumers' use of local and regional news varies, with some countries having stronger traditions of local and regional news than others. In the US, regional television news was the most used news source at 30% of the population. Regional/local newspapers were used by 20% of the population and local radio news by 17%. In Canada too, the local and regional newscasts of CTV Canada top the news sources in the English language (41%), and other local sources feature strongly with local radio news at (25%), City TV news (22%), community newspapers (19%) and local dailies (15%). In Denmark, regional TV news is the third most accessed news per week and local/regional newspaper websites are used by 10% of the population while a further 10% of the population use local weekly websites. In Finland, 31% of the population use free city papers, 23% of the population use regional newspapers and 19% use local papers. Online, 15% access regional papers and 13% access local papers. In France, the websites of local or regional newspapers are the second most popular online news

sources (although still a very low percentage at 14%). In 2017, in Germany regional/local newspapers were the third most used news source and regional TV was the seventh, and this was the exact same result for the Netherlands. In 2019, the results were almost identical for Germany. For the Netherlands, however, both categories had slipped with regional/local newspapers going to fourth place at 19% of the population using these products weekly, and regional TV 10th place with 13% use. In South Africa, local radio news is the third most used news source at 30%, regional or local newspapers are used by 21% and community newspapers by 15% of the population.

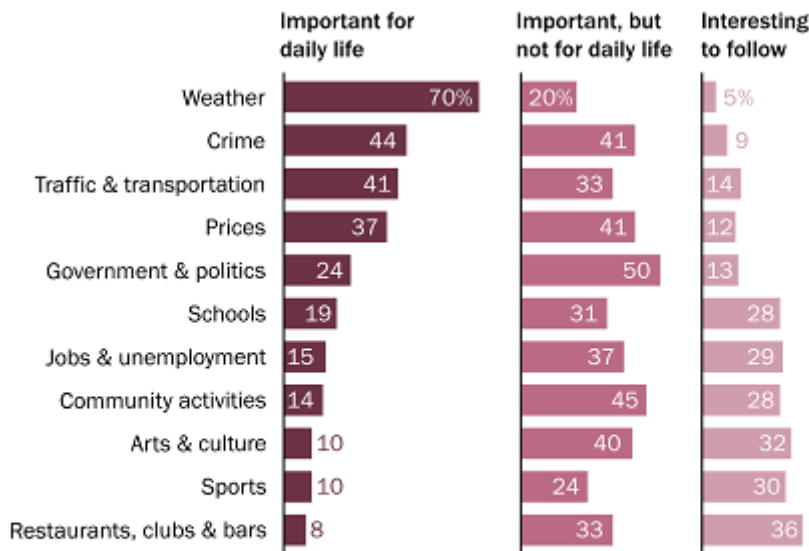
Despite the interest in local news in the UK (see Figure 2.24 in section 2.5.1), a regional or local newspaper was only used by 12% of those surveyed in the previous week and a local newspaper website was accessed by 9%.

It is also worth noting that these percentages don't reveal access issues which might impact use. Recent, nationally-representative research from Pew highlights local news gaps:

Most Americans (73%) follow local news at least somewhat closely, but still, about a quarter of U.S. adults (26%) follow local news either not very closely or not at all. Additionally, about four-in-ten (38%) don't have any type of news provider they rely on regularly for local news, while another 30% rely regularly on just one (Pew Research Center 2019, p. 12).

The Pew data further breaks down local topics by different types of content, uses and interest levels (see graph below). However, even within that breakdown the researchers note there are further differences between communities, for example 'jobs and unemployment' rank far higher on importance and interest in demographically different communities, 18% in higher-proportion black areas and 25% in higher-proportion Hispanic areas, compared with 10% in higher-proportion white areas (Pew Research Center 2019, p. 10).

Figure 2.9 Percentage of U.S adults who say each local news topic important

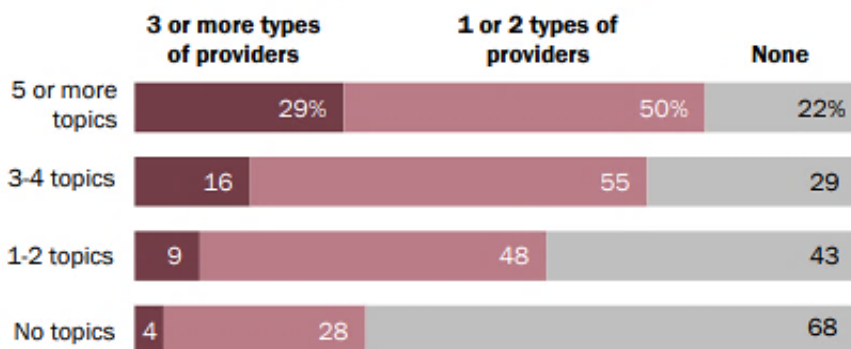


Note: Those who think each local news topic is neither important nor interesting not shown.
 Source: Survey conducted Oct. 15-Nov. 8, 2018.
 "For Local News, Americans Embrace Digital but Still Want Strong Community Connection"

Source: (Pew Research Center 2019, p. 8).

Pew also found 'those who see a greater number of topics as having daily importance also tend to get local news from a wider range of provider types' (Pew Research Center 2019, p. 44). See chart below.

Figure 2.10 Percentage who often get local news from different total number of providers (among those who say local news topics are important for daily life)



Source: Survey conducted Oct. 15-Nov. 8, 2018.
 "For Local News, Americans Embrace Digital but Still Want Strong Community Connection"

PEW RESEARCH CENTER

Source: (Pew Research Center 2019, p. 44)

In the UK, the Ofcom News Consumption surveys provide a breakdown of local news by platform, finding TV is the most popular platform for accessing local news with almost half the population saying they watch regional and local broadcasts on the BBC and a third on ITV. Asked about quality, more than four in five of these TV watchers were satisfied. The survey also found that almost a quarter of new users use printed local or regional newspapers and 16% use social media for local news (Ofcom 2018c, p. 103). When they asked people where they tend to go more often for their local news, they found TV tops the list at 38% and social media and newspapers are equally placed at 14%, while the internet tends to be used by 11% of the population and radio 10%. Interactive TV is used by 4% of the population (Ofcom 2018c, p. 18).

Of particular interest in the UK context is the change in content brought about by local digital TV – small-operation TV stations set up with the help of the TV Licence Fee and which first started operating in 2013. In 2017, 24 of the 34 local TV channels were available on multiple platforms compared to 17 of 21 channels in 2016. However, the 2011 Local Media Action Plan required original local content from each channel and the amount per channel is going down. The average volume of first-run local programming broadcast by a local TV service in 2017 was 1,205 hours (23 hours per week). This was down from 1,625 hours (31 hours per week) in 2016, and 1,732 hours (33 hours per week) in 2015. Ofcom also reports concerns regarding viability of the sector; at this point the expenditure of the operations (measured as a whole across the sector) is double that of income (Ofcom 2018b, p. 6).

Looking at radio, the strength of the local BBC offering becomes apparent. As Figure 2.11 shows, this is not just in terms of being preferred above local commercial radio but also in being strongly preferred by people of non-English speaking backgrounds.

Figure 2.11 Radio stations used for news by demographic, UK, 2018

	Total	Male	Female	16-24	65+	ABC1	C2DE	EMG	Non-EMG
BBC Radio 2	26%	25%	27%	18%	31%	28%	24%	14%	28%
BBC Radio 4	23%	24%	21%	6%	37%	28%	15%	15%	24%
BBC Radio 1	19%	19%	20%	49%	7%	19%	20%	28%	18%
Heart FM	18%	13%	22%	32%	5%	15%	20%	25%	16%
Capital	13%	11%	15%	33%	2%	12%	15%	26%	11%
BBC Radio 5 Live	13%	19%	7%	5%	12%	14%	12%	15%	13%
BBC local radio in England	12%	12%	13%	1%	24%	11%	14%	4%	14%
Other local commercial stations	8%	7%	9%	6%	6%	6%	11%	3%	9%
Classic FM	8%	8%	8%	7%	10%	7%	8%	10%	7%
Smooth Radio	8%	7%	8%	8%	6%	7%	9%	12%	7%
talkSPORT	7%	12%	2%	3%	3%	7%	7%	9%	7%
Magic	7%	7%	7%	9%	3%	7%	7%	11%	6%
Kiss	7%	6%	7%	20%	0%	5%	8%	13%	5%
LBC	6%	7%	5%	3%	4%	7%	6%	21%	4%
Absolute Radio	6%	6%	5%	5%	1%	5%	6%	7%	5%
BBC Radio Scotland/Wales/Ulster	5%	5%	4%	5%	5%	5%	5%	1%	5%
BBC World Service	4%	4%	3%	3%	5%	5%	3%	5%	4%

Source: Ofcom News Consumption Survey 2018

Question: D6a. Thinking specifically about radio stations, which of the following do you use for news nowadays?

Base: All using radio for news 2018 - Total=2096, Male=1034, Female=1060, 16-24=176, 65+=512, ABC1=1216, C2DE=876, EMG=276, Non-EMG=1809

Green shading indicates significant differences between groups. Only sources with an incidence of 4%+ in 2018 are shown.

Source: (Ofcom 2018c, p. 37).

Despite the slightly more dominant position of BBC local radio compared to commercial local radio, the latter is also valued in the UK. It is seen as being an 'accessible, universally available and dependable medium...serving as a companion and allowing effortless consumption of local information' with the latter part of effortless consumption especially important for more rural listeners who found commercial and BBC local radio more dependable than national radio (Ofcom 2016, p. 5). In studying the reasons why people listened to radio, the research also revealed what affordances were valued in other mediums. Newspapers were associated with detailed coverage and a 'truly' local focus (Ofcom 2016, p. 7). Participants also had in-principle support for the newly-formed digital local TV stations, although they did not currently rate them highly because of misgivings regarding initial quality of their offerings (p.40).

News deserts

There is concern in the United States since 2016 regarding the threat of news deserts (see for example www.usnewsdeserts.com), not only because of the net loss of 1,800 local newspapers since 2004 (Abernathy 2018, p. 6) but also because of the ownership structure with many local newspapers bought by investment firms, making them more vulnerable to market dynamics (Abernathy 2016). Abernathy calculates that there are currently almost 200 of the 3,143 counties in the US without a local paper and 'hundreds – if not thousands – of communities at risk of becoming isolated news deserts' (Abernathy 2018, p. 11). While much of the public attention has focused on rural and regional areas because of the issue of isolation and increasing polarisation of the US society, around 70%, or 1,300, of the newspapers that closed or merged were suburban papers. 'Their demise leaves a news vacuum for many of America's suburbs and urban neighbourhoods, where residents have historically relied on community weeklies to keep them informed about the most pressing local issues' (p.11). As noted by Napoli, indicative research suggests that this is especially an issue for poorer communities who seem to be much more poorly served in terms of news volume (Napoli et al. 2017).

There is a similar story in the UK. The *Digital News Report 2019* highlights Press Gazette research showing it is the local and regional sector that has been hit hardest with the net closure of 245 local news titles in the last 13 years (p. 67). The Department for Digital Culture Media and Sport (2018) *Overview of Recent Dynamics in the UK Press Market* maps these closures and pulls out statistics regarding the lost provision of news as a percentage per region. The figure below maps these closures graphically highlighting locations 'where closures have happened more frequently' (Department for Digital Culture Media and Sport 2018, p. 63).

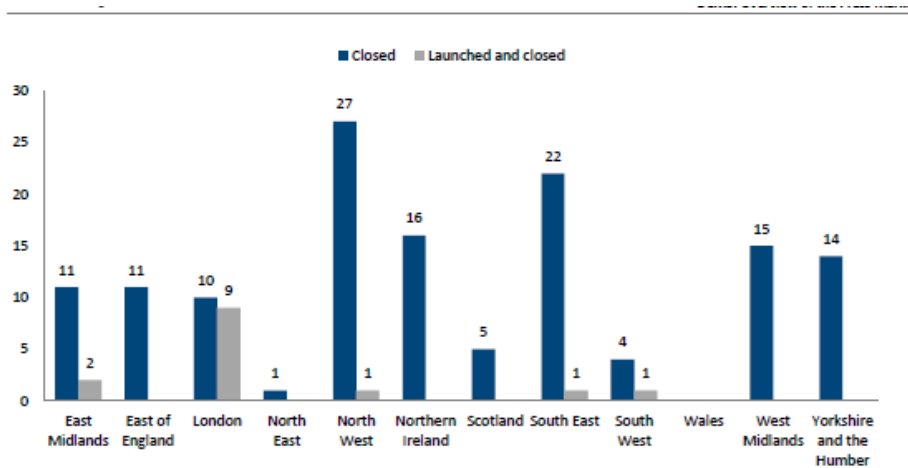
Figure 2.12 Location of local newspapers closed in the UK closed between January 2012 and February 2018. Source Press Gazette, Mediatique; press reports



Source: (Department for Digital Culture Media and Sport 2018, p. 63).

The same research also broke down the loss of local newspapers by UK administrative region.

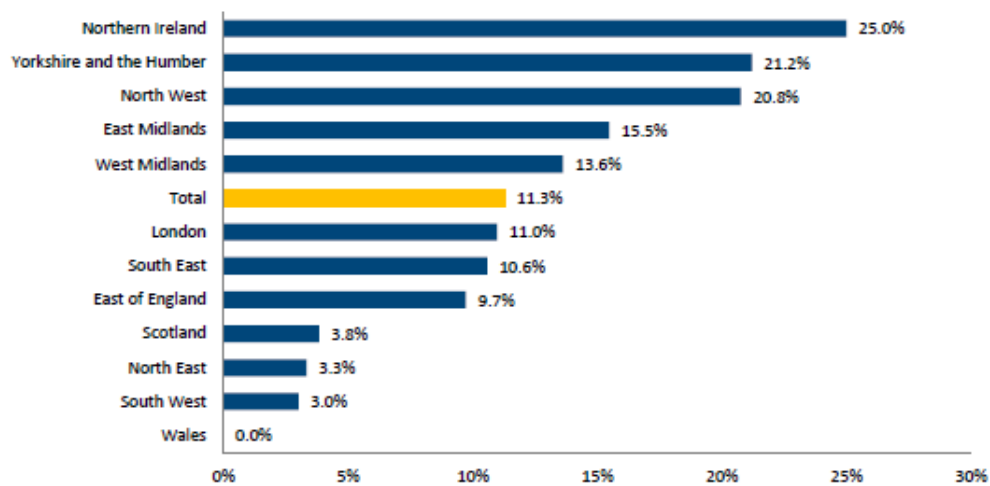
Figure 2.13 Number of local and regional newspapers closed between 2012 and 2017 by region



Source: (Department for Digital Culture Media and Sport 2018, p. 64)

The final graph in the series of three presented in the *Overview of recent dynamics in the UK press market* shows that some regions, which may have had fewer closures as a total figure, have nevertheless lost a greater percentage of their media ecology.

Figure 2.14 % Decline in the number of local and regional papers by region since 2016



Source: (Department for Digital Culture Media and Sport 2018, p. 64)

In Canada too, a similar mapping exercise is taking place, although it is being driven by crowdsourcing and university researchers. Figure 2.15 maps the closures and mergers by region, while Figure 2.16 shows the nature of the changes to the media outlet (e.g., outright closure or changing to become a community paper).

Figure 2.15 Number of local news outlets closed or merged 2008 to 2016, by region in Canada

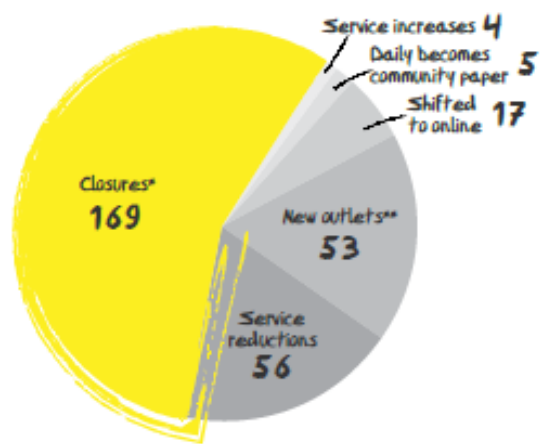


Source: (Public Policy Forum 2017, p. 45)

Figure 2.16 Local news service changes between 2008 and 2016

MORE CLOSURES, LESS LOCAL NEWS

Most changes to local media outlets since 2008 were closures or loss of service (Data as of Nov. 7, 2016)



*Includes closures due to mergers
 **Includes new outlets created from mergers
 Source: Local News Research Project

Source: (Public Policy Forum 2017, p. 45)

2.4.2 Types of local news: Community building versus watchdog journalism

Our analysis of the qualitative research shows that the types of local news that are important to Australians can be broken into two key strands: community building and watchdog journalism. A third strand which is also of importance is local news providers as emergency broadcasters. However, as this literature is more limited, and deals specifically with concerns around the ABC, it is dealt with separately in section 2.6.2.

Community-building types of local journalism

Australian academic researchers have noted that local media has a special function in terms of community cohesion. However, much of that research has discussed local journalists' own perception of themselves (Bowd 2011, 2014, 2017; Cooper et al. 2017; Gutsche & Hess 2018; Hanusch 2015; McGregor 2016). More recently, that gap has been acknowledged (Richards 2014) and there has been an attempt to take audience perspectives into account. This small set of qualitative studies has validated the journalist-perspective research. Meadows (2013) found the processes of local community building central to the success of community radio. Richards found residents in the South Australian towns of Mount Gambier and Naracoorte describe local newspapers as holding a central place in the community, even to the point of giving the community a 'sense of itself' and 'leading' the community (Richards 2014, p. 10). The same research found that clippings from the local newspaper were used as conversation starters to help introduce newly-arrived refugees to the community (p.11). Residents also compared differences between their newspaper and that of a neighbouring town and praised the neighbouring town paper that more actively supported community-building types of reportage. In an earlier, larger study, which asked focus groups about all types of local media in Mount Gambier, Roxby Downs and the Canadian Province of British Columbia, Richards similarly found that residents valued the type of local media which plays a community-building role.

This community value of local news media is similarly reflected in a 2017 national online survey of Australian radio listeners, with 853 respondents from metropolitan areas and 414 from regional (GfK 2017). Over half (55%) of regional listeners thought radio connected them more to their community, while 76% agreed that radio was key to keeping up-to-date with community events, compared regional listeners to 58% of metropolitan listeners (GfK 2017).

In contrast to the critical, or at least ambivalent, attitudes towards the media held by many residents of large cities, regional community members spoke well of what they perceived to be 'their' media. Overall, their responses not only suggested a sense of ownership of these media, but also that the part played by those media was different from the part played by metropolitan media. This difference related especially to the image of the local community as presented in local media reportage. A view widely shared in both Canada and Australia was that local journalists could be relied on to report 'responsibly', generally understood to mean supporting their community by publishing positive views and attitudes about that community. This did not mean that community participants expected journalists to suppress negative news about their area but, rather, that they considered they could rely on local journalists to 'do their professional best' to report negative news in ways which did not harm the social fabric of the community (Richards 2013, p. 635).

However, responsibility to the social fabric of a community can limit the local news coverage. In a study involving interviews and focus groups with readers of regional

newspapers, Hess found that local newspapers consciously and unconsciously foster collective affinity to a specific geographic area for those who live there and beyond (2015, p. 486). This was despite some participants noting that this community-building tended to exclude news coverage for minority groups, particularly Indigenous communities and immigrants, or hesitated to include notices of a gay marriage, for example (2015, pp. 487-8).

Returning to the subject of residents of regional Australia, the findings of Richards' work involving residents of Mount Gambier and Naracoorte are echoed in earlier research by Bowd in 2011 involved four regional Australian locations. She found from her focus groups that regional consumers, particularly community leaders, liked the fact they had a sense of personal connection with their local media, particularly as this meant that media was less likely to sensationalise (Bowd 2011, p. 85).

This wish for responsible – meaning not unnecessarily negative – reporting may be particularly tied to regional areas. When asking news consumers to assess the news media's performance across five criteria (scrutiny, negativity, relevance, keeping people up-to-date, and explaining events), *The Digital News Report 2019* found as follows: 'There is little difference between cities and regions, except for negativity. News consumers in regional areas are more likely to think the news is often too negative compared to those in major cities' (Fisher, Park, et al. 2019, p. 115).

The support for the community-building type of local media is also visible in ACMA's *Regional Commercial Television Local Content Investigation* report 2013:

A common theme in the majority of the public submissions [to the inquiry] was the sense of community and identity that local information provides to regional areas. Similarly, most public submissions indicated that community access to local content was an important method of communicating public messages, including public safety information (ACMA 2013, p. 18).

In 2018, Muscat published the result of research which looked at commercial TV in Sydney as a form of local media. Muscat conducted interviews with 40 commercial television viewers in Sydney and found that one of the key reasons they valued the news was for the ability to maintain shared local interests with others across the city. Moreover, she found that viewers wanted commercial TV news to take more of a community-building role. Her participants wanted more news that might inspire civic action (e.g. volunteering) and more news that would help support harmonious relations across the city. 'Across the research, 40% of viewers felt that local television news did not realize its potential in supporting cultural, suburban, Sydney, or national 'communities.' (Muscat 2018, p. 230). Muscat's participants clearly identify with the community-building role of media.

There is little difference between Muscat's research results focusing on community building and inclusivity in Sydney, and Richards' 2013 research in regional Australia and Canada. A third of Richards' participants in all three regional city sites (two in Australia, one in Canada) at some stage raised inclusivity as an issue, and the desire for media to do more in this regard:

participants at some stage referred to the need to make a special effort to include in community engagement those who have been largely excluded. Specific groups mentioned were the poor, the homeless and the unemployed, as well as members of indigenous and ethnic minorities. Congolese refugees who had recently settled in Mount

Gambier were put forward as an example of a group which had as yet had little input into community dialogue, and this was seen to be partly due to inadequate local media coverage. The only media considered to be doing an adequate job at all sites in regard to inclusivity were local community radio stations and free community newspapers. (Richards 2013, p. 638)

The importance of local media for inclusivity has also been argued specifically in the case of Indigenous media. Meadows found

a wide range of audiences access Indigenous radio and television in Australia. Both Indigenous and non-Indigenous listeners and viewers say these unique services offer an essential service to communities and play a central organising role in community life. Indigenous radio and television help maintain social networks and play a strong educative role in communities, particularly for young people (2015, p. 145).

The expectation that local media will play a responsible role in organising community life can perhaps also be seen in public attitudes towards special town halls organised by media companies. A case-study analysis⁸ of participant experiences at three Community Conversation events organised by ABC Local radio in Tasmania discovered:

there was support from participants for more solutions orientated journalism with clear evidence of both interest and civic commitment from journalists to their communities and the expectation from participants, reinforcing previous empirical evidence, that people want the local media staff to be connected to the community (Nettlefold 2017, p. 293).

It should be noted that the positive response to what the researcher termed imperfect attempts at participatory journalism (imperfect on the part of the journalists) came in the context of existing frustration regarding:

restricted media accountability, a lack of diversity and reduced opportunities for transparent public debate as a result of the growing local 'news gap' between the information communities would ideally have access to, and the information that is actually made available from independent sources of news' (Nettlefold 2017, p. 289).

Evidence from overseas shows that events are an important aspect of local media retaining its role in the community since the shift to online. Similarly examining local news in the US, but focusing on newspapers, Ali and his collaborators point to several studies from the early part of the decade which demonstrate readers prefer local newspapers to be community advocates and good neighbours rather than watchdogs. Their own research which involved 56 interviews with experts and practitioners found that newspapers were consciously taking up the community-building role 'increasingly holding events to discuss community concerns' (Ali et al. 2018). A prominent Australian example is the *Newcastle Herald* public forum in 2012 which attracted 400 people and led for calls for a Royal Commission into Sexual Abuse⁹.

The importance of the role of media in community building is also strongly present in the international literature. As pointed out by Nielsen, there is a long history of study of the community-building role of news. Robert E. Park and his colleagues at the University of Chicago in the 1970s 'even going so far as to suggest that metropolitan regions in the US might best be defined by the circulation area of particular newspaper' (Nielsen 2015, p. 55). This old view is backed up by recent qualitative studies. In 2016, Nielsen found focus group participants and interviewees in Denmark describing the local paper as 'our

⁸ Research methods included participant observation, interviews and analysis of social media text about the events

⁹ <https://www.theleader.com.au/story/5123043/from-darkness-a-light-starts-to-shine/>

paper'. Nielsen points out that this view does not inscribe uncritical support for the paper as there were often criticisms of performance but it 'valorizes the newspaper as an important part of the local community' (Nielsen 2016, p. 845).

Research by Ofcom also in 2016, specifically regarding radio, found participants listing several social benefits of radio including 'facilitating learning and building social currency, and providing opportunities for individuals and organisations (especially on a local level)' (Ofcom 2016, p. 26). This research wasn't just on news however, the role of news was part of the mix being studied and it seems safe to assume news played a role in the type of social benefit being described by the UK participants.

Research by Lie in Denmark asked interviewees to describe the 'importance of the press to them personally' and found that it was mostly to get an overview of the state of the community (Lie 2018, p. 55). Lie further found that even though Facebook was a more efficient use of media when it came to organising voluntary activities, the local paper was still used so as to make sure the wider local community was aware that those events were taking place (p.59).

US qualitative research has found interest in local news has a clear connection to social and civic dimensions:

During a discussion among 18–29-year-olds in Bowling Green, Kentucky, participants began addressing their growing recognition of the relevance of local news:

I kind of feel like – and I talk like I'm old or something – but the older you get, you kind of realize that the local stuff is what's actually important and affecting you more than what you see on CNN. ...I think it's nice to know what's going on in your backyard. (Bowling Green, Kentucky; 18–29-year-olds) (Brown, Wenzel & Roca-Sales 2017, p. 24)

Wenzel (2018)) points out the community-building role of local media in an increasingly polarised US society. The research in Iowa showed the community appreciated reporting that seemed less opinionated than national reporting. Although they did note room for improvement, with most suggestions focused on the community building role of media including less negativity, greater skills of journos and resources for them and greater use of the local community as sources writing some of the content (Wenzel 2018, pp. 7-8). Beudet & Wihbey (2019, p. 18) research similarly highlighted TV consumers expected responsible community journalism from local outlets. When asked what they did not like about local TV news, 'representative answers were: 'Shows too much negativity and not enough good'; and 'Sometimes they seem to make things more dramatic for attention.'

Pew Research from March this year pointed out the community value ascribed to local news 'those who say journalists are in touch with their community are 31 percentage points more likely to say their local media do a good job of dealing fairly with all sides – 73%, compared with 42% among those who say their media are out of touch' (Pew Research Center 2019, p. 6). This value holds up even when controlling for other factors. For example, the authors state:

Confirming past research about other types of news, this study also finds a link between closer attention to local news and more positive job evaluations of local news media. Those who follow local news very or somewhat closely, for example, are 30 percentage points more likely than others to say local news media do well at providing news they use daily (75% vs. 45%). There is something of a natural connection between rating the media poorly and following the news they produce less closely. Less-intuitive

relationships between measures such as community connection and job ratings hold true even when controlling for how closely people follow local news. (p29)

Finally, international scholars also point to the fact that the discourse on community building can also hide negative side-effects.

The term 'community' is all too often taken to be inherently good. This, according to Hess and Waller (2016), masks the dark side of community dynamics, most notably discrimination, exclusion, and inequality. Extending the term to journalism, 'community' assumes all 'community newspapers' practice community journalism and the community newspaper is *sin qua non* a product of a small, closely knit geographically proximate town (see Lauterer, 2006). Both of which may not be the case (Reader, 2012; Steiner, 2012)...As Steiner (2012) writes, 'glowing praise of independent community weeklies often ignores that community newspapers increasingly are units of chains, edited by careerists without local roots, and written by people who don't know one another and rarely meet up at regional offices' (p. 21) (Ali et al. 2018, p. 4).

Nielsen's 2016 research reported on a different 'in-group/out-group' issue. In his case study of a town with only one local daily paper, he found some residents rejected it, calling it 'their paper' (p. 845) because of a belief the paper was partisan (even though the paper itself thought it was impartial).

Local watchdogs

A second type of local news valued by consumers is watchdog news. Local media outlets are often instrumental in exposing wrongdoing, sometimes with larger repercussions than the local level (O'Shea 2019). As noted in the quote above from Richard's study, consumers do not expect local media to suppress negative news – instead they expect this to be reported in a responsible way. Despite this being a key role of local media, and in contrast to the community-building research above, there are not a great number of studies in Australia dealing specifically with this type of local journalism. In particular, Australian consumer research focusing on people's attitudes to this type of local news is missing. As with Richard's study, there is some other qualitative research which has picked up people's concerns about local watchdog journalism. These will be discussed more fully in section 2.6.1.

In 2019, the Australian Local Government Association showed the importance its members place on this type of journalism when deciding to add to their *State of the Regions* report by commissioning research of a survey of media managers employed by local governments. This was done in an attempt to better understand the state of local journalism across Australia, and how declines are impacting the important function of reporting on local government. This decision to focus on local government areas (LGAs) was made as 'local government should be a key interest of public interest journalists, and in a healthy news ecology, representatives should have regular contact with local news journalists' (Simons & Dickson 2019)

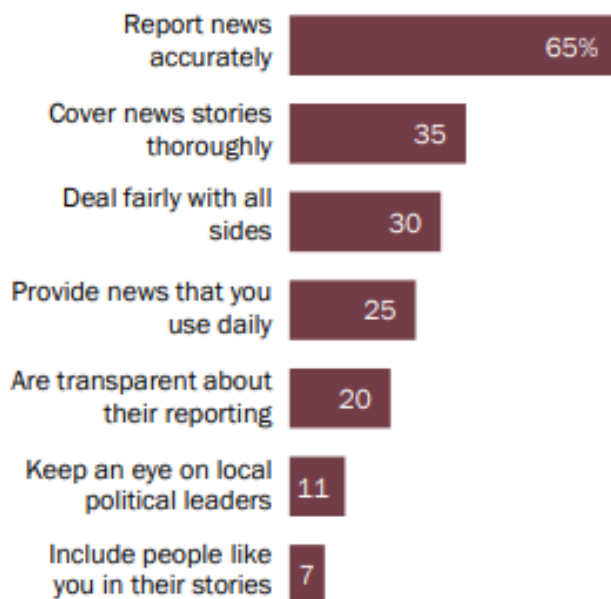
There were 117 responses from 84 different local government areas and the authors concluded that the results are worrying.

- Metropolitan LGAs suggested a very sharp decline in the amount of local news (68 percent), while slightly less than half said the same in regional and rural areas (45 percent) and 31 percent said that things were about the same.

- Almost a third of councils report that no journalists attend local government meetings. Although the figures suggest that some journalists follow up without attending the meeting, the indications are that a large part of local government business goes entirely unscrutinised and unreported.

Mirroring the dearth of Australian research, there is very little international research asking consumers specifically about the watchdog function of local news. One reason for this may be because this highly mythologised (De Botton 2014; Zelizer 2013) function is more associated with glamorous national papers and broadcasters. In two studies in the USA where audiences have been asked about the watchdog function directly, this seems to be mid to low down the list of values for local news. One study was based on results from a national survey panel (N=613; average age 34) across six diverse media markets that involved A/B testing of traditional and remixed story segments. Asked about the reasons why they watch local TV, news investigative reports ranked 6th on a 12-type scale (Beaudet & Wihbey 2019, p. 14). As Figure 2.17 shows, nationally-representative Pew research on local news found keeping an eye on local politicians to rank six out of seven.

Figure 2.17 Percentage of US adults who say each of the following is one of the top two functions they most value in their local news media



Source: Survey conducted Oct. 15-Nov. 8, 2018.
 "For Local News, Americans Embrace Digital but Still Want Strong Community Connection"

PEW RESEARCH CENTER

Source: (Pew Research Center 2019, p. 29)

Despite the lack of attitudinal research, the watchdog function of local news has been studied in the international academic literature with the assumption that it is valued, particularly in democracies. Ali notes 'political economists of media call the abandonment of high-quality investigative local journalism by commercial news organizations a market failure' (2016, p. 107). Hamilton (2016) has highlighted the instrumental role of local newspapers in exposing the implementation of federal policies in the field. Their FOIAs [Freedom of Information Act requests] to federal agencies may involve a local problem, but the local story can expose patterns that apply to other localities...' (p.168). His analysis of the pattern of FOIAs from 2005-10 also showed that local papers played a particularly large role in scrutinising departments which received less scrutiny from other sources (p. 170). The *Overview of Recent Dynamics in the UK Press Market* noted the consolidation, closure and hubbing of local news functions has meant 'reducing commitment to some categories of content (e.g., court and local council reporting)' (Department for Digital Culture Media and Sport 2018, p. 57). Karlsson (2016) conducted a long-term content analysis of online newspapers in both the UK and Sweden with random front-page samples from 2002, 2007 and 2012, including regional papers and found a loss of political reporting and far more lifestyle reporting.

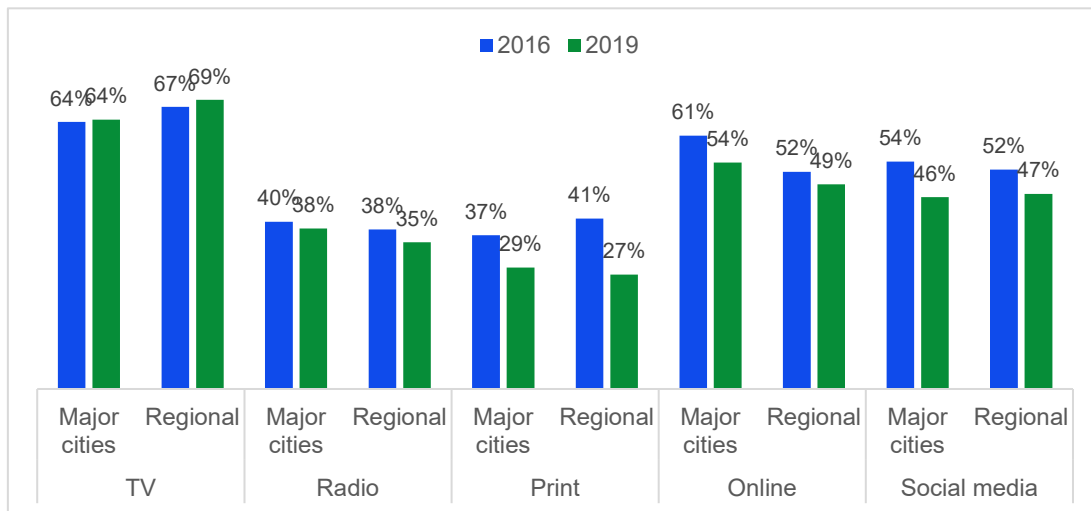
In case-study research of a regional town in Denmark, 1450 representative respondents were surveyed and the researchers found a declining importance for print, with only 32% rating it as important or very important, compared to 55% for regional TV and 45% for weekly freesheets (Nielsen 2015, p. 60). Young people in particular did not consider the local daily paper important, however that attitude did not take into account the diversity of content produced (p. 61-67). Nielsen found 'most of the many stories about local politics produced by the local paper never appear anywhere else' (p. 67). This leads Nielsen to consider local newspapers 'keystone media', something which is discussed further in the 'assessing public impact' section.

2.4.3 Changing kinds of news: hyperlocals and council news

Unlike the UK and the US, where hyperlocal media has been researched extensively as a solution to closing regional and rural papers (see below), there is far less research in Australia. Nevertheless, there is evidence that hyperlocal media is emerging around the country. The case studies in ACMA's 2017 report pointed to the existence of three independent online sites across the 11 regional areas considered (one of which, in the NT, had existed as a small community paper before going digital) and several local news aggregation websites (ACMA 2017a). Many of the news aggregation services exist on social media and so it is worthwhile considering the use of social media in more detail.

According to the *Digital News Report 2019*, the use of social media as a main source of news is on the rise. What's more, regional news consumers are 'slightly more likely to rely on social media for news (21%) than people in cities (18%)' (Fisher, Park, et al. 2019, p. 114). Despite this, research commissioned by the Centre for Media Transition (Fisher & Park 2019) found that overall social media use for news in the regions was actually less in 2019 than 2016, as shown in Figure 2.18.

Figure 2.18 General sources of news (%)



Source: (Fisher & Park 2019)

As this question does not differentiate between the types of news, it is not possible to know how much of the social media use is for specifically local news and whether that is on the rise even if overall use is on the decline.

A different question was put forward by researchers for ACMA's 2013 *Regional Commercial Television Local Content Investigation* and found that 'social media (63 per cent) were used at least once a week by around six in 10 Australians living in regional Australia who reported that local content was provided by these sources in their local area' (ACMA 2013). However, in both 2013 and 2016 the community survey data shows that the most common source of local media in the regions was the local newspaper. Social media comes in fourth place in both surveys and the rise in the three years is only minimal from 55% to 58%. The three per cent climb means that social media is increasing at half the pace local newspapers is decreasing (94% to 88%). Use of social media for local news is slightly higher in non-obligation areas 62% to 58%. The *Local Content in Regional Australia 2017* report found 9% of regional Australians prefer social media as their source of local news (compared to 3% in 2013), however, trust in social media as a news source remains low 4% (ACMA 2017a, p. 10). Trust in online news, that is news published on websites such as a news organisation's own digital platform, is slightly higher, with nearly 9% of regional Australians considering websites as a trustworthy source of news (ACMA 2017a, p. 10). This difference is also reflected in the slightly higher use of online news sources compared to social media in 2016 and 2019 (see chart above).

As can be expected, there are generational differences too. As the ACMA notes: 'The preference for social media as a source of local news is significantly higher among regional Australians aged 18 to 24 (19 per cent) and lower for those aged over 65 (one per cent)'. Younger regional demographics also access more news online, with 25- to 39-year-olds significantly more likely to use websites for local news (38%), compared to over-65-year-olds (10%) (ACMA 2017a, p. 12).

The research from PIJ for the ALGA, with a survey with 117 responses from council media managers, again points to the importance of social media for hosting hyperlocal

news. The data indicates that across both metropolitan and regional areas ‘Citizen run news outlets make an important contribution’ with just under ¾ of survey respondents in both metro and regional areas indicating that:

residents share information and news in a peer-to-peer manner on social media. Facebook groups functioning as noticeboards, for second-hand trading and as extensions of community organisations were the most common vehicle for this (Simons & Dickson 2019, p. 9).

These other ‘news’ outlets are represented in Figure 2.19 below.

Figure 2.19 Are there any other news outlets run by ordinary citizens, such as blogs or community news sheets, that provide local news in your local government area?

	M	%	R/R	%	Total	%
Yes	26	72	57	73	83	73
No	11	28	21	27	32	27
Total	37		78		115	

Source: (Simons & Dickson 2019, p. 9)

While the data indicates a proliferation of hyperlocal sites that provide some local news, there are question marks about how valuable these types of hyperlocal news are for the scrutiny of local government. These question marks may need to be considered with caution as the data of the ALGA report may be slightly skewed, in that it came from council media managers, but there was a perception that these sites reported in an unfair, partisan and even inaccurate way. In defence of the media managers’ viewpoint, the authors point to forthcoming academic research, based on case studies which has also brought up the concern that hyperlocals are more partisan than traditional local media and this can lead to community fragmentation instead of community cohesion (Simons & Dickson 2019, p. 4). This result is interesting in the context of earlier, qualitative research which suggested the opposite:

social media are providing a form of communication which is helping community members maintain personal relationships as well as encouraging them to participate in community dialogue which extends to local media. In this way, social media have become important contributors to communication at the level of the individual and at the level of the community (Richards 2013, p. 637).

Other research has suggested that social media, when used consciously by engaged citizens, may also provide opportunities to insert local perspectives into national media dialogues (Given, Winkler & Hopps-Wallis 2017, p. 5).

Of course, it is important to distinguish between types of hyperlocal news. Websites run specifically for the purpose of presenting local news, some staffed by ex-journalists, have a very different ethos¹⁰ and there can be successful hybrid models. It has been argued ‘ABC Open’s approach to “collegial gatekeeping” ... may be quite similar to the idealized traditions of old-fashioned community journalism’ (Reader 2018, p. 6)¹¹.

¹⁰ Carol Altmann ‘News With Bite’ presentation at the Journalism Educators and Researchers Association conference, 2018, Hobart

¹¹ However, ABC Open is no longer being supported by the ABC

Carson et al (2016) also studied a particularly active police Facebook page in Broadmeadows. The site received up to 30,000 unique views, to be useful for community-police relations and for crime-solving. The success of that particular page also relied on the police sergeant's personal commitment.

There will also continue to be offline and online hyperlocals focused on community cohesion. O' Shea (2019, p. 59) states:

there is some evidence that rural communities in Australia will continue producing community newsletters and independent newspapers if the major players disappear. In the tiny town of Wandearah, 180km from Adelaide, the heritage society recently started producing its own local newsletter. Many other towns throughout Australia are doing the same.

The author goes on to make the point: 'There is no doubt that while human interest news has a future in rural communities, hard news reporting and the future of newspapers are at risk' (O'Shea 2019, p. 59).

Talkback radio programs are a more established media format that Ewart identifies as 'one of the few available sources of hyper-local news in an increasingly globalized media market' (2014, p. 790). Focus groups with 135 active audience members of 12 commercial and non-commercial talkback radio programs, showed that these respondents valued dialogic (non-populist) talkback as a way to seek, share and respond to specialised information specific to their communities that they could not obtain elsewhere, such as weather, traffic conditions, local events and issues (Ewart 2014, pp. 792-8). Although some respondents were aware that talkback content was not necessarily factual and actively filtered opinion from news, many defined this 'very local information' as news (Ewart 2014, pp. 799-804).

When making these distinctions between the types of hyperlocals emerging, it is worth noting that council-generated news is not the same as local independent news media despite being conflated as such in some research both in Australia and overseas. Information produced by councils or other government and non-government services cannot be expected to take on watchdog functions. They may produce some community-building functions but even this is reduced when compared to news media. Randwick Council in Sydney was considered as an exemplar innovative local authority which helped set up a very successful community forum to discuss the impacts of the light rail. 'However, the government's actual engagement with citizens through digital means remains limited. Of the 767 comments posted in the light rail forum (with over 42,000 views), the single post from a council affiliate contained only a picture of the proposed route' (Freeman & Hutchins 2016, p. 23). The authors go on to state: 'This example illustrates that, even in advanced cases, key opportunities for authorities to stimulate political dialogue with constituents are ignored' (Freeman & Hutchins 2016, p. 23). A finding, which is similar to the results of the ALGA survey, is that most 'councils [admit] they monitored discussion occurring in social media groups but none said they actively engaged in the groups' (Simons & Dickson 2019, p. 9). It may be that hyperlocal sites are allowing more conversation between individuals but less citizen-to-state conversation than when that forum was a local news media outlet mediated by professional journalists.

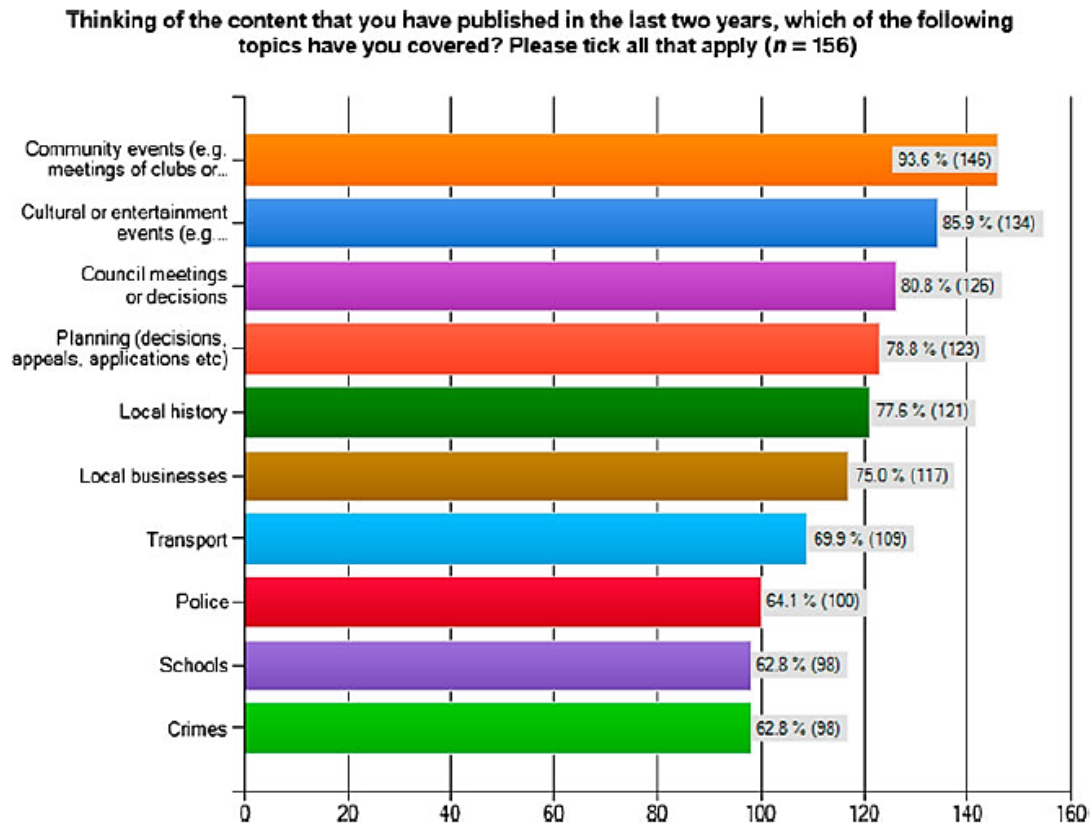
As mentioned earlier, the situation with hyperlocals, and research on hyperlocals, is quite different internationally. In the UK and the US, by the mid-2000s a proliferation of

hyperlocal websites had emerged and were followed by academic, corporate and government interest. Digital platforms have provided information-gathering tools and publishing and distribution channels that have enabled hyperlocals to flourish, with some existing solely on social media (Harte, Williams & Turner 2017; Williams, Harte & Turner 2015). However, despite initial optimism both the UK and US have seen prominent news investments in hyperlocal sites fail (Barnett & Townend 2015, p. 337; Hindman 2015, p. 6). There are also concerns that hyperlocals do not suit every community/market environment. Hindman argues:

Worrisome, too, is the fact they [hyperlocals] have found the most traction in the affluent, social-capital rich communities that need them least. Employing a few reporters in Minneapolis or West Seattle or New Haven is great. But the same model has failed in many other places, even when the journalism produced was high quality (2015, p. 6).

The UK has seen a proliferation of hyperlocals start, and also cease, operation. By June 2013, of the 632 hyperlocal websites listed on the Openly Local database, only 496 were actively operating in the United Kingdom (Harte 2013 cited in Barnett & Townend 2015, p. 337). From 5 December 2013 to 24 February 2014, Barnett and Townend conducted a survey of hyperlocal sites and received 183 responses, 75% of which were complete. They found the key content was community based (as shown in Figure 2.20 below) and that many were uncomfortable with the notion of themselves as journalists (p.344). This tally's with qualitative work by Turner who found, via a study of 'lost pet' posts on hyperlocals that 'hyperlocal media is, for many residents, key to an everyday understanding of their neighbourhood, a network of local information and events sitting outside corporate and mainstream media that can encourage unexpected forms of civic engagement' (Turner 2015, p. 48). Turner further argued that hyperlocal practice in the UK does not sit comfortably with expectations that it should fill perceived gaps left by receding local media.

Figure 2.20 Stories covered by hyperlocals (as reported by hyperlocal journalists), UK



Source: (Barnett 2015 p. 341).

Nevertheless, just over 4 out of 10 respondents to the hyperlocal survey said they had carried out an investigation in the last two years (N = 154), with an average of 6 for each one (N = 55). 'There was a wide range of examples, but virtually all of them qualify as good illustrations of watchdog or accountability journalism at the local level' (Barnett & Townend 2015, p. 341) and more would have been carried out but for resource restraints. This leads the authors to conclude that BBC resources could be used to support hyperlocal sites, or there could be a central organisation which would help with specifically democratic functions, for example with Freedom of Information requests.

Looking at the US situation, Ali (2016) also raised concerns regarding the cost of the democratic function of journalism in relation to hyperlocal sites, as well as their viability, more generally. Ali argues: 'While some exceptions exist it is telling that the largest network of hyperlocal news sites in the United States – AOL's Patch.com – was gutted and sold in 2013 after running losses upward of \$300 million' (2016, p. 106). Writing in the Swedish context where hyperlocals also have a strong presence, researchers similarly highlight that although 'hyperlocal media has repeatedly been framed as a potential saviour of local journalism', they are in a vulnerable economic position which among other points makes them vulnerable to the influence of free content via PR departments (Stúr, Jangdal & Nilsson 2018, p. 87)

Another concern is raised by Nielsen. In his Danish regional city case-study, he found a dearth of hyperlocal attempts:

Despite high levels of internet use and the generally high levels of participation in civic associations in Denmark, no hyperlocal or citizen journalism sites have emerged in the community, and bulletin boards with a local focus have very low levels of activity (Nielsen 2015, p. 52).

The international research cited above shows that local media in Scandinavia is still highly used and accessed by consumers compared to elsewhere. This is not the case in other places. In the US for example, given the strong critiques of the existing media environment McCollough, Crowell & Napoli (2017, p. 109) were similarly surprised by the lack of appetite for community journalism, including on the part of focus-group participants who were currently marginalised by the media. They discovered that the personal costs and risks associated with journalism practice were intensified in the idea of self-exposure among a small community. One participant suggested a partnership with news organisations training up local community members – an idea which the authors point out is also supported by academic literature (p. 113).

Even if hyperlocals are started, there is a question of how they are received. Firmstone & Coleman (2015) carried out qualitative case-study work in Leeds, UK conducting interviews with both civic actors, politicians, frontline council workers, NGOs/activists and media professionals. They looked at citizen journalism and considered its role within the civic media ecology, which also included council communication and consultation and traditional local journalism. They concluded:

Digital media have certainly broadened the communication ecology, but a combination of a lack of understanding of new forms of media, limited resources to implement a digital strategy, and conservative perceptions of the media preferences and skills of the public serve to maintain the value of mainstream news media above that of digital media (p. 134)

Furthermore, 'there was uncertainty about the motives, legitimacy and credentials of citizen-produced journalism' (p. 135). Firmstone and Coleman also pointed out that much citizen journalism was more akin to 'interest groups, run by volunteer citizens' and while some citizen journalists would like to do watchdog journalism, they were limited by resources. Their report card was not better for the Leeds Council either. They found 'due to the current structural characteristics of the council's media use, neither one-way nor dialogical uses of digital media systematically engage with individuals' (p. 136).

2.5 Consumer attitudes to local news

2.5.1 Appetite for local reportage

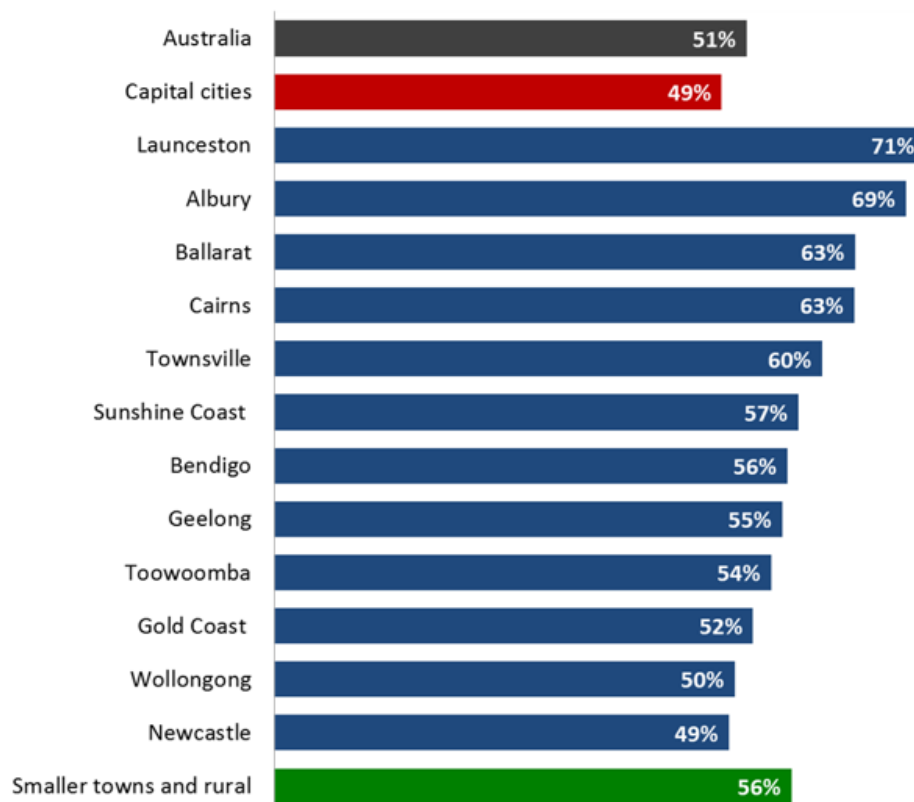
People want local news

Research over a number of years has consistently shown that all forms of local reportage are highly valued. This research includes quantitative surveys such as ACMA's own regional reports in 2013 and 2017, the results of the *Digital News Report* and surveys by commercial companies such as Roy Morgan.

The *Digital News Report* research in both 2016 and 2017 gave 12 category options to news consumers and in both years 'News about my region, city or town' received the highest level of interest (Park et al. 2017, p. 9; Park et al. 2016, p. 8). Similarly, Roy

Morgan research from 2015 found that a majority of Australians (51%) described local news as ‘the content they most wanted to see, hear or read one or more times across the week’ (Roy Morgan 2015). However, the Roy Morgan research also revealed that this preference for local news is usually higher in smaller communities. As Figure 2.21 shows, consumers in regional towns had some of the highest preferences for local news (up to 71% in Launceston) and the overall percentage for smaller towns and rural areas was 5 percentage points higher than the national average.

Figure 2.21 Local news as most preferred type of news by geographic location



Source: (Roy Morgan 2015) – Roy Morgan Single Source, April 2014-March 2015, sample n=51,882 Australians 14+

ACMA research conducted by Newspoll in 2013 and 2016 (published 2013 and 2017) likewise found that local news was highly valued in regional Australia. Nevertheless, it is worth noting that while the overall percentage remained high in both surveys there was a key difference between the two samples. In 2013, the proportion of regional Australians who described local content as very important or somewhat important was 91%. In 2016, the combined percentage of those describing it as very or somewhat important was only slightly lower at 89%. However, the ratio between the two categories of ‘very’, and ‘somewhat’ had changed significantly with only 54% describing local news as very important, compared to 62% in 2013. This drop came among a period of heavy cutbacks and closures of commercial, public and community regional media (ACMA 2017a; Carson et al. 2016; Freeman, Hess & Waller 2017; O’Shea 2019; Simons et al. 2017). The researchers involved in the New Beats project, tracking job losses in news, point to

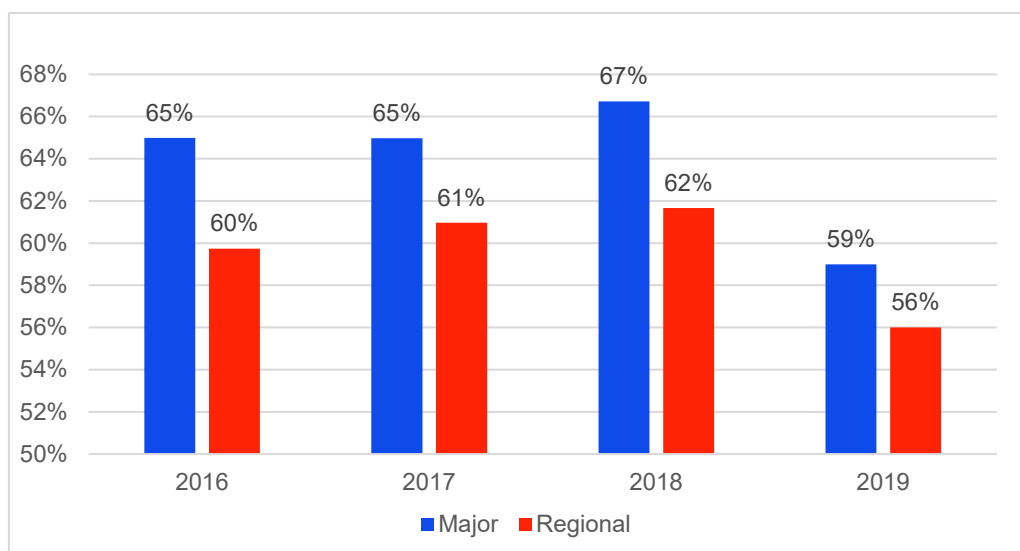
2014-2015 as the key period when cutbacks in regional and rural news operations started to become visible (Zion et al. 2016).

One way to measure how much people value local news is to see if they are willing to pay for it. The Centre for Media Transition commissioned a survey of 266 respondents residing in regional and rural areas. All respondents had a gross annual personal income of \$40,000 or more. The research was conducted by CoreData between December 7, 2017 and January 15, 2018 via an online quantitative survey of approximately 20 questions. Of those surveyed, 13.8% said they were prepared to pay for local news. This attitude may not be indicative of actual usage. 'Two in five regional consumers said they bought a printed newspaper at least once a week and almost one in five had a subscription to a digital news service' (Fray 2018, p. 4). Furthermore, the value of local news again came to the fore when asked what would make them more willing to pay. Here the top responses were improved relevance of news coverage (36.2%), better quality of reporting (35.3%) and improved amount of local news coverage (31.8%) (Fray 2018, p. 4).

The preference of non-metropolitan audiences for local news should also be put into the context of interest in news in general. Analysis of the *Digital News Report* from 2016-2019 conducted for the Centre for Media Transition shows that a high level of interest in news is consistently lower outside metropolitan areas with fewer people in regional Australia saying they have a high interest in news.

The figure below shows there are fewer regional news consumers with a high interest in news compared to those in the cities. This lower interest in news has remained consistent over the past four surveys.

Figure 2.22 High interest in news (%)



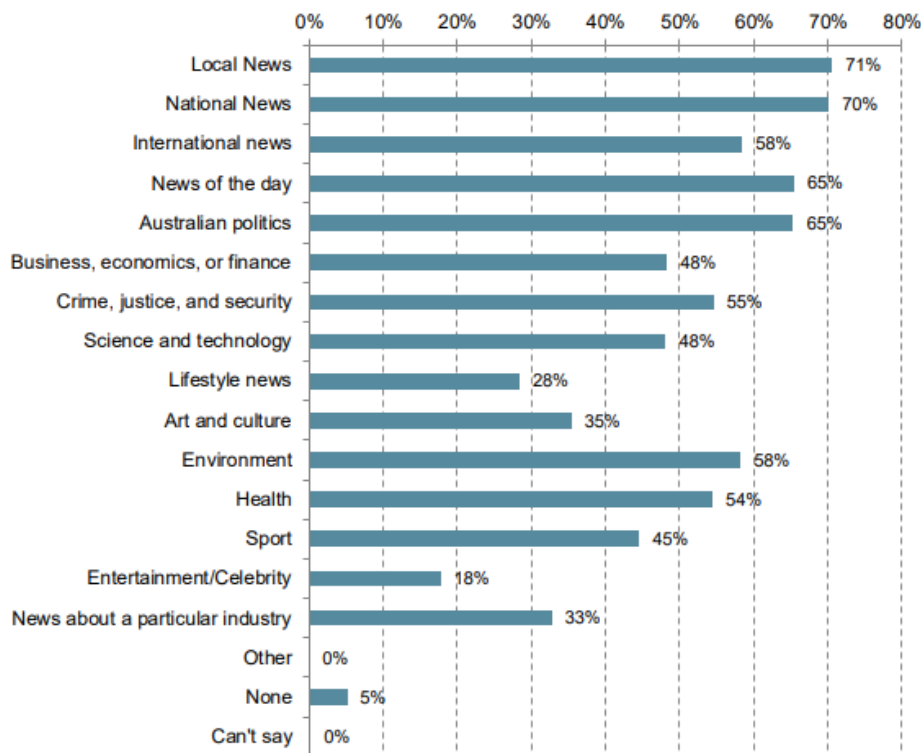
Source: (Fisher & Park 2019)

Consumer attitudes towards local news media as a source of local information are reported positively in reports cited by industry bodies, such as Commercial Radio Australia and NewsMediaWorks. In an online survey of 1,267 Australian radio listeners, 63% thought radio provided relevant local news and content, and 74% of regional

listeners thought the platform was important in staying up-to-date with local news (GfK 2017). Similarly, high rates of value were reported in a study commissioned by NewsMediaWorks, with 77% of 1,440 newspaper readers surveyed agreeing that regional newspapers, in print and digital formats, were their main source of information about local community, businesses and services (NewsMediaWorks 2016). (It should be noted that as neither of these industry studies detailed their research methodology, it is difficult to judge whether they are representative studies; however, they can still be taken as indicative of Australian regional audiences.)

Finally, the Roy Morgan-conducted ACCC Consumer Use of News Survey 2018 asked what genres were important in allowing people to participate and engage in Australian society and local news was considered most important (figure below).

Figure 2.23 Genres of news content that are important in allowing people to participate and engage in Australian society



Source: ACCC Consumer Use of News Survey 2018. Q31 What genres of news content are important in allowing people to participate and engage in Australian society?
 Note: This question allowed for multiple responses and therefore the figures will not sum to 100%
 Base: Australian Population 18+ (n=2031)

Source: (Roy Morgan 2018a, p. 28)

While there is always room for greater verification, the quantitative research to date allows us to answer with a degree of certainty that local news is important to all Australians and especially regional Australians. What this research does not reveal is whether that importance placed on local news is in long-term decline, and whether the current decline is part of a more general trend for all news or whether there are specific factors affecting local news.

Internationally, a similar picture can be seen. In February 2019, using data from a 2017 survey, the Reuters *Digital News Report* team published research on news relevance, highlighting the importance of news content which is regionally or locally based as one of the things news consumers most seek (Schröder 2019). They observe that in the UK local and regional news was most popular, as in many other countries, with nearly two thirds of news consumers ‘extremely’ or ‘very’ interested (p.8), as represented in Figure 2.24 below.

Figure 2.24 UK interest in news content categories

News content category	%
Region, town	63
International	51
Crime, security	48
Political	47
Health & education	44
Science & technology	36
Business, economy	32
Sports	31
Weird	22
Lifestyle	22
Entertainment & celebrity	18
Arts & culture	17

Source: Reuters Digital News Survey 2017, ‘How interested are you in the following types of news?’ Percentage of people responding ‘Extremely’ and ‘Very interested’.

Source: (Schröder 2019, p. 8)

There is a mismatch between what content UK consumers say they would like and what content they say they use news for. Ofcom data from 2018 found that the top reason consumers said they follow the news is to know what is going on in the UK, followed by the world, third in the list is to know what’s going on in their region/nation with fourth place being ‘to know what is going on in my local area’ (Ofcom 2018c, p. 88) .

In recent times, the scholarship around news has had a focus on trust and this is another way to consider the importance of local news to consumers. The *Digital News Report 2018* found that, for the US, local television news was the most trusted news source; with the significance of this finding being related to the increasingly polarised nature of US society – local news is seen as less impacted by this polarisation (Newman et al. 2018, p. 43). Other markets are showing their appetite and support for local news through shifting to online subscriptions. The Amedia group in Norway, which runs about 60 local newspapers and websites, has 160,000 digital subscribers, up 45% between 2017 and 2018 (Newman et al. 2018, p. 23).

Schröder (2019)) complemented the survey of news relevance with qualitative work and again found that localism was highly important to news consumers stating, ‘many participants express a natural interest in local news, irrespective of topic’ and:

The strength of the local dimension also becomes evident in the way participants reject a story about Jeremy Corbyn presenting Labour's new national free bus policy for under-25s (Story5); some mistakenly perceive this as a local story about Derby, where the launch took place. Alice tells us, 'Well, it's Derby, I don't care' (Alice P2). Upon realising this is a national policy, some participants immediately find it relevant: 'Is that just a local scheme to Derby, or are they, is that going to be national, is it? ... Oh okay, so yes, I will be interested to find out what that is' (Michael P4). (Schröder 2019, p. 14)

Qualitative Ofcom research into local radio users in 2016 with 151 participants through 24 demographically-representative workshops in 12 locations across the UK, found that even though the main reason people listened to local radio was for the music, the content they rated as most important was the local. In the US, a Shorenstein Centre research project involving over 600 respondents (average age 34) provided 'overwhelmingly positive' adjectives when asked about local news programs on TV, the most popular adjectives being 'good, informative, accurate, relevant, friendly' and 'unbiased' (Beaudet & Wihbey 2019, p. 17).

In Canada, focus-group research conducted in the lead-up to the Canadian Radio-Television and Telecommunications Commission 2018, *Harnessing Change* report found some focus group participants wanted government intervention to ensure audio and video local content and others argued against it because they believed individuals would always seek local content, thus ensuring a private market. Representative of this view was the comment:

If you don't have local content, how are you supposed to know what's going on in your city or town council? It really inhibits your community because people don't necessarily get out and do those kinds of things.' (Saskatoon) (EKOS Research Associates Inc. 2018, p. online)

The same research involved a representative survey which found that Canadians listen to and view a wide variety of content, however, news and information are of the greatest personal importance, with national and international news viewed or listened to by three in four, and local news consumed by two in three.

2.6 Consumer concerns about local news

2.6.1 Unmet expectations of local news consumption

A difference between the 2016 and 2013 ACMA research is the percentage of regional Australians who report having access to all the local content they want. In 2013 this proportion was 91%; in 2016 it had dropped to 78%.

One type of local news that is missing – and is likely contributing to the lack of satisfaction – is watchdog journalism. The small number of available Australian studies in this area have found this expectation is not being met and consumers blame shrinking newsrooms for this lack. Richards discovered participant after participant, who held civic roles – and where therefore potential news sources – had started to turn away from local media when it came to potentially negative stories. This was because they felt the local media did not have the resources to 'look at the issue from a broader point of view' or stay engaged with the story when they were covering a large region (Richards 2014, p.10).

A case-study analysis of the communities of Byron Bay and Broadmeadows by Carson et al (2016) similarly found civic leaders to be turning away from local media as journalists became more stretched for time.

- The Chief Executive Officer of Broadmeadows' Banksia Gardens Community Services (who manages more than 40 community programs that assist 80,000 residents annually, including Victoria's largest asylum seeker cohort) noted 'local journalists did not have time to meet weekly with her, as they once had, and sometimes reported inaccurately' (Carson et al. 2016, p. 138).
- Byron Bay Mayor Simon Richardson remarked that he had a 'very good' relationship with local media; however, his press releases were often reported verbatim. 'It's great for me', but he noted that it 'wasn't so great for the community'. This suggested to him that local newspapers' resources were 'really stretched' (Carson et al. 2016, p. 137).

The same research found that 'general perceptions about local media's role in Broadmeadows in terms of civic leaders' contact with journalists, use of the media for public engagement and advertising were that each of these functions had diminished with time' (p. 139) and 'conspicuous by its absence was evidence that the local media in these places were performing the 'fourth estate' function of holding power to account' (p. 141).

This concern for the watchdog role of journalists can also be seen in relevant concessions induced by cross-bench politicians to pass the federal government's media reform package in 2017 (Broadcasting Legislation Amendment (Broadcasting Reform) Bill 2017). As noted by the Senate Select Committee on the Future of Public Interest Journalism 2018, these concessions had little to do with cross-media ownership; instead, a number of them were aimed at strengthening the capacity of local journalism through support for training and more staff (Senate Select Committee on the Future of Public Interest Journalism 2018).

The Senate Select Committee's summary of the submissions it received to the public inquiry into the future of public interest journalism noted that local journalism, and particularly the watchdog style of local journalism, was a concern for submitters:

2.41 A good deal of evidence noted the decline of 'journal of record functions' in recent years, particularly coverage of local courts, councils and politics. A number of submissions noted the loss of these functions had occurred across platforms and throughout Australia, although it has been particularly acute in regional and rural areas.

In a related point, the committee also noted that there were also a number of submissions concerned that the ABC was losing its capacity to deliver local news and current affairs.

Overall, a majority of Australian news consumers in both regional and metro areas feel that the news media is not monitoring the interests of powerful people and business. Whether in large cities or outside them, agreement with the statement that they *do* perform that watchdog role runs at only 45% (Fisher, Park, et al. 2019, p. 115). The loss of local watchdogs from the media ecosystem may be a contributing factor to this negative perception.

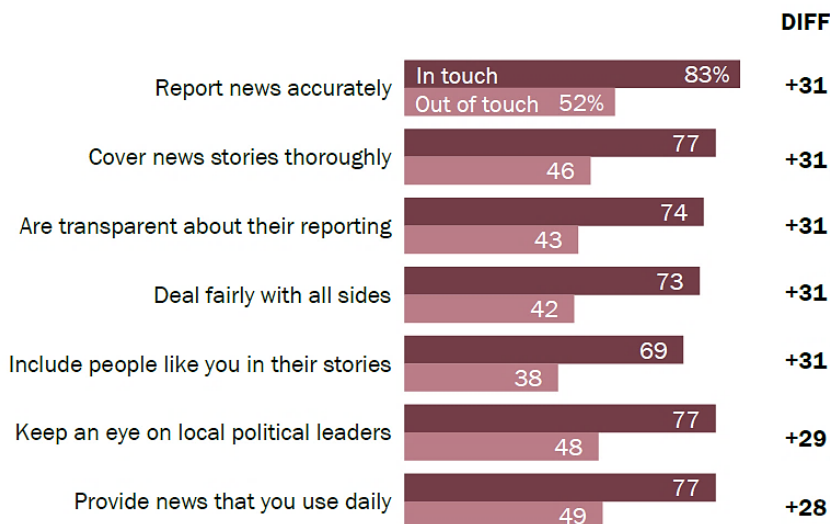
The inability of journalists to cover council stories has opened the path for councils, and community organisations, to meet consumer demand and publish more of their own stories online (Carson et al. 2016; Freeman & Hutchins 2016; Simons & Dickson 2019) It has also opened the path for hyperlocals run by concerned citizens (discussed below). The case studies in ACMA’s *Local Content in Regional Australia: 2017 Report* capture council run information services as part of the regional media ecology. It should be noted, however, that council press releases are not the equivalent of independent reportage and are unlikely to address the societal expectation of journalism of record.

Internationally, research this year by Pew has found concerns regarding the community-building role of local journalism too. The authors state that while most Americans value journalists’ connection to their community, it is something of an unmet expectation for many, with fewer people experiencing it that value it.

While most Americans agree it is important for local news media to be connected to their community, they offer mixed views on several measures of that connection. This matters when it comes to job evaluations. Americans who sense their local outlets are well-connected to the community in each of three areas – being in touch with the community, local influence and geographically focused coverage – are much more likely to evaluate local news reporting positively, be confident in their main news source’s ability to inform them, and say it is easy to find news on a range of different topics (Pew Research Center 2019, p. 30).

As Figure 2.25 shows, those who do experience a sense of community connection from their local media will rate their local news around 30% more positively on several job indicators than those that don’t.

Figure 2.25 Difference between job evaluation of local news media according to whether consumers think local journalists are in touch or out of touch with their community



Source: Survey conducted Oct. 15-Nov. 8, 2018.
 “For Local News, Americans Embrace Digital but Still Want Strong Community Connection”

Source: (Pew Research Center 2019, p. 30).

2.6.2 Concerns around the ABC in regional Australia

There is an expectation, especially on the part of regional Australia, that ABC radio services will provide local content, even if that is not a specific legislative requirement imposed on the ABC. Freeman, Hess and Waller note the ABC is 'causing distress in parts of the bush when it comes to news and information' (2017, p. 118).

[in 2014] in the wake of funding cuts, the public service provider announced it would shed up to 400 jobs across its network, axe Radio National's Bush Telegraph, reduce Newcastle radio in New South Wales and close five regional stations. This exacerbated the existing difficulties around information provision within rural and regional communities (Freeman, Hess & Waller 2017, p. 118)

The authors argue that the introduction of the ultimately unsuccessful Australian Broadcasting Corporation Amendment (Rural and Regional Advocacy) Bill by Senator Bridget McKenzie was an attempt by regional communities to 'fight back'. Freeman et al's analysis of the submissions to the inquiry show there is community concern about the ABC's digital strategy exacerbating existing information inequalities, not only due to the redeployment of resources, but because of the lag between country and city when it comes to digital infrastructure (Freeman, Hess & Waller 2017, pp. 122-6). Although many of the submissions were from local councils not individuals, it should be considered that the role of council in these instances is to reflect their communities' sentiments. These concerns gleaned from the submissions would seem to be borne out by the usage data finding popular offline news brands in regional areas did not have the equivalent audiences online (Fisher & Park 2019). For example, ABC News Online was only used by 19% of regional news consumers compared to 25% of urban news consumers who access ABC online.

Despite concerns about the ABC's metrocentricity (Ames 2015, p. 54) and what is said to be a sacrifice of regional content for city concerns (Freeman, Hess & Waller 2017, 2018):

The ABC holds an increased audience share in regional areas in comparison with its metropolitan ratings, which is linked to the quality of ABC content and 'the fall in genuinely local news delivered by the Corporation's commercial rivals' (MEAA, s10: 9). (Freeman, Hess & Waller 2017, p. 122)

Again this analysis would seem to be borne out by usage patterns with the ACMA's 2016 research on regional Australians' access to local content showing that the use of ABC radio and ABC websites for local news is higher in non-obligation areas than obligation areas (62% vs 57% for local ABC radio and 42% vs 36% for ABC website). This is the case even though the overall rating of local ABC radio as the most common sources of local content has fallen 11 percentage points, from 66% to 55% between 2013 and 2016 (ACMA 2017d, pp. 13, 6).

A final area of unmet expectations regarding the ABC concerns its role as an emergency broadcaster. It is argued that the 'digital first' strategy is leading to a reduced service for rural and regional Australians, who are more susceptible to natural disasters, and also more prone to digital blackspots in coverage. Furthermore, that since digital infrastructure is not as reliable or available, the removal of shortwave radio from the ABC offering was a mistake (Freeman, Hess & Waller 2018). In a similar research strategy to the above, Freeman Hess and Waller examined the submissions to the Australian

Broadcasting Corporation Amendment (Rural and Regional Advocacy) Bill and were surprised to find the depth of public sentiment on the issue of ABC emergency broadcasting.

A total of 55 of the 67 submissions commented on ABC emergency broadcasting. As one of the Bill's amendments is for regional stations to be appropriately staffed during disasters (in accordance with Occupational Health and Safety regulations), it was anticipated that emergency broadcasting would be addressed in submissions. However, the comments extended well beyond the need for staffing. Two emergency radio subthemes subsequently arose during analysis and are examined in the following sections: the (in)capacity for rural/regional Australians to access warnings; and how the frequency, timeliness, and accuracy of emergency news suffer from decreasing 'localness' (Freeman, Hess & Waller 2018, p. 347).

The submissions noted that decreasing 'localness' had led to incorrect and incomplete information during disasters as reporters were unfamiliar with the territory – even to the point of mispronouncing place names which also decreased audience confidence in the information (Freeman, Hess & Waller 2018, pp. 351-7). The submissions highlight that the ABC is currently not meeting rural/regional expectations of media access and content during natural disasters (p. 356).

Similar themes emerge in radio research from the UK. Ofcom research shows that correct pronunciation of local place names is seen as important for adding credibility (Ofcom 2016, p. 57). However, it did not reveal any great concern with the consolidation via regional hubs of radio stations, with the caveat that the news offering remained the same. This equanimity may be representative but is not universally the case; academic research on regionalisation and consolidation (McDonald & Starkey 2016, p. 128) found that in Newcastle news of the closure of their station led to outrage on social media and a change in media consumption habits with a surge of listeners. Although overall the article is neutral on practice of hubbing and notes methods to do it well, the authors do point out 'There is a difference, however, between content sounding local and being local':

Elements lost when news is 'hubbed' are the 'on the spot' news reporter, the use of the news car, the reporting of court and council meetings, a permanent physical presence allowing public access, and above all one of the greatest qualities of radio – immediacy – because pre-recorded bulletins are difficult to interrupt with breaking news. (McDonald & Starkey 2016, p. 129)

2.7 The scale of local

2.7.1 Expanding geographies and resource allocation

One of the ways in which regional media has adapted to the current environment is by merging services (Bowd et al. 2017; Simons et al. 2017; Zion et al. 2016). This means that papers aimed at specific rural and regional towns and cities are now filling their pages with syndicated and shared copy. This merging has expanded the 'news' definition of what is considered local and may also be having an impact on what news audiences consider 'local'. ACMA's research in 2013 and 2016 found that there was an increase in people defining 'local' as their region, compared to 2013 when most people defined local as their town. Figure 2.26 shows the categories with the highest responses.

Figure 2.26 ACMA research on frequent access to local content

Definition of local:	2016	2013
Your suburb	9%	13%
Local council area	18%	16%
Your town	30%	41%
Your region	36%	21%

Source: Data files published by ACMA along with its 2017 report, *Regional Australians' Access to Local Content – Community Research* available at:

<https://www.acma.gov.au/theACMA/Library/researchacma/Research-reports/local-content-in-regional-australia-2017-report>.

Expanded geographic footprint of media has an impact on what can be covered and how well it is covered. Journalist academic Fiona Martin gave testimony at the Inquiry into Public Interest Journalism giving the example of ABC Wagga Wagga, which is expected to also cover Griffith:

They [ABC Local] do as much as they can on the phone. But there are a lot of issues that are going uncovered in Griffith because Fairfax has had to cut back its operations there and all of the local news media have had to cut back. So I think that is one of the key issues: we do not necessarily know how much of that consistent, reliable coverage we are getting (Martin in Bowd et al. 2017, p. 63).

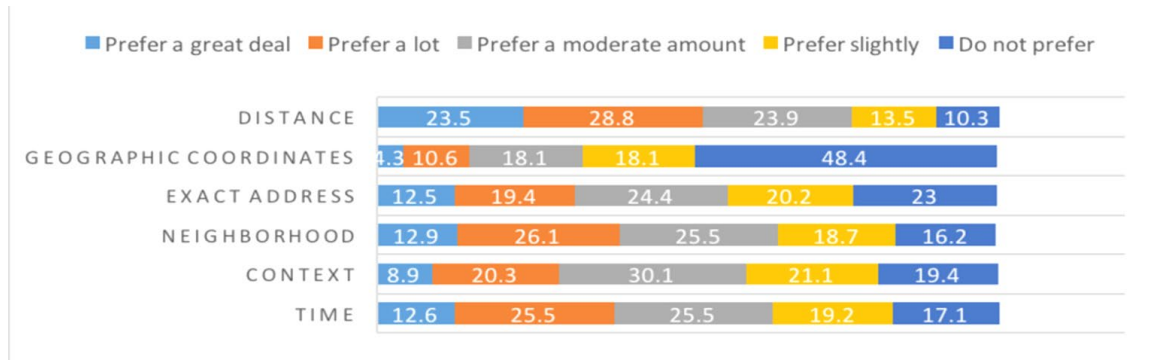
Large distances are especially an issue for TV news reportage which is picture-reliant and thus a story may be downgraded in importance simply because image capture is too difficult. Although the research needs to be updated with current findings, the concerns raised by Tannock, specifically regarding TV coverage in Queensland in the early 2000s, are still valid. Tannock found that 'capital city based television news programs do not adequately compensate for decreasing local news services. Inland and remote Queensland centres receive very little coverage on the statewide bulletins' (Tannock 2002, p. 168). Key to the issue of distance is the fact that having a local crew on the ground makes it more likely for the story to be picked up by other media, giving communities a chance to be part of the national conversation:

Criteria for inclusion in a statewide television news bulletin appears to include proximity to the news headquarters, in this case, in Brisbane, the presence of an affiliated local television news operation, the network's own bulletin or locally based news crew and a significant population base. (Tannock 2002, p. 168)

As noted by Schmitz Weiss (2018, p. 47) in her study in the US, the geographic scale of news has always been a concern of journalism, not least because of resources, meaning the allocation of journalists to 'beats'. What's more 'local' might also be defined by regulation and market considerations (p. 48-9). In her research, Schmitz Weiss was interested in the possibility of GPS location-based services, noting that despite potential, experiments have so far proved that more work needs to be done in making such services easy for consumers and journalists (p. 50). Through an online (non-representative) national survey administered by Amazon Mechanical Turk to 979 people in October 2017, Schmitz Weiss found a third of survey respondents perceive news in the city they are in as being close to them (p. 54) but in terms of geolocated news they 'would like a more granular or micro view of the location of the news they receive' (p. 55) including the neighbourhood it happened in, how far away a news event is in distance, and how many minutes away it has occurred from where they are (see Figure 2.27

below). Schmitz Weiss goes on to note ‘Neighbourhoods can often be much smaller than typical regions or counties of a city that often dictate the newspaper’s approach to geographically covering a community’ (p. 55).

Figure 2.27 Preference to receive geolocated news by type of geolocation



Source: (Schmitz Weiss 2018, p. 55)

In the UK, qualitative Ofcom radio research considered conceptions of local in workshop sessions. They found (Ofcom 2016, p. 14):

- When tasked with drawing maps of their local areas, the majority of participants visualised the geographical areas immediately surrounding their homes. Most participants’ maps included their homes, along with key neighbouring places of interest and amenities e.g. shops, bars, parks, places of worship, and the homes of friends and family members.
- Younger participants, commuters and those driving frequently were more likely to visualise a wider local area, including roads to neighbouring areas and places of interest that were further afield.

The Ofcom research reveals consumers are sensitive to the difference between local and regional although this diversity of offering can be a good thing when both are available. Nevertheless, BBC local radio was seen as providing more regional content compared to local commercial radio and local newspapers. The same regional focus was observed for BBC TV’s and ITV’s local offerings (p. 7). A similar sensitivity to regional instead of local offerings is seen in Nielsen’s case-study research in Denmark where some interviewees in smaller villages reject the daily paper for being the ‘big paper’ not truly covering the news needs of the village even when there are pages devoted specifically to the village (2016, p. 845).

2.7.2 Ties that bind beyond shared locale

Shared experiences

Physical proximity is not the only measure of local. For example, the existence of a large distance may be exactly what binds a community together as ‘local’ in the sense of existing in conversation with each other and sharing common interests and concerns, as is the case with remote areas of Australia. In 2016, ACMA commissioned research which saw a total of 351 interviews conducted with a sample of Australians aged 18 years and older living in remote or very remote WA. Issues of commonality included greater likelihood of experiencing natural disasters and greater reliance on radio, and particularly

ABC radio, both FM and AM, as a key media source, due to availability and long hours spent driving.

Two-thirds of remote Western Australians reported having experienced emergency situations (fire or weather event) in the last 10 years, compared with 38 per cent in regional Australia. In the case of an emergency, the key sources used for up-to-date news were far more concentrated on the Bureau of Meteorology and ABC Local radio than in the rest of regional Australia (ACMA 2017b). The shared experience of disasters is an element which binds disparate remote areas together in terms of information needs. Their shared interests encompass specific lifestyle, economic, cultural and political realities which bring them together as a media 'community'. This is recognised in the BSA local content requirements in that the points system takes into account news that may not originate locally but is highly relevant to the local community – such as stock prices. Similarly, remote Indigenous communities have a common interest in sharing experiences of political and economic developments and sharing cultural events. In considering Indigenous media, Meadows notes (2015, p. 146) that 'most of the small stations based in remote townships are engaged in re-transmitting available satellite programming, both mainstream and community produced':

One passionate listener on Palm Island in far north Queensland explained simply: 'Because it's blackfella listening to blackfella. You know you want to communicate with them. You know!' (Meadows 2015, p. 145)

The relationship between stigmatisation and localism

According to the academic literature, stigma is another common shared experience which influences why communities come to define themselves as local, and furthermore why they have a particular interest in locally-produced media. As noted above, research in the outer Melbourne suburb of Broadmeadows and the regional NSW town of Moree found local media were 'valued for giving a more nuanced account of neighbourhood realities than did the media from outside, who only paid attention to these places when the reports were negative' (Carson et al. 2016, p. 141). Indigenous-produced media has been valued for the same reason (Carlson et al. 2018; McCallum & Waller 2017; Meadows 2015; Waller 2019) even if there are questions about how much that media is listened to and whether the lack of listening means this media is not reaching its democratic potential (Waller, Dreher & McCallum 2015).

Studies in the USA also reveal the importance of speaking back to the nation in cases of stigma and stereotyping. Gutsche studied Iowa City's south-eastern neighbourhoods – known as the 'South-east Side' looking at residents' self-perception compared to characterisation by journalists and found residents rejected representations of their neighbourhood as a ghetto:

In the end, this study suggests that scholars adopt a notion of news place-making as an understanding of the ideological (and practical) work journalists and their sources do in shaping dominant understandings of geography. Approaching place as an ideological project – as a process embedded with applications of power in what geographies are defined, how they are defined, and who defines them – contributes to an awareness of how place-making holds purposes of social control through stereotyping (Gutsche 2014, p. 505).

Another study conducted six focus groups across three different communities within a single state in the north-eastern United States (two focus groups per community). The

specific communities studied were selected in an effort to achieve as much community-level diversity as possible despite sharing the same state boundary. The communities varied in size (277,000; 55,000; and 18,000), per capita income (\$13,000; \$16,000; and \$37,000), and ethnic composition (74% non-white; 55 per cent non-white; and 37% non-white). In the focus groups with online news consumers, 'the marginalized/underserved community members were the most emphatic in expressing the need for journalists to be better neighbours who may make their needs more visible and provide more accurate and less stereotyped representations of them in the news' (McCollough, Crowell & Napoli 2017, p. 111). Wenzel's work in Iowa found that, particularly in rural areas, national media was distrusted in relation to local media because the national journalists were not seen as 'fair or respectful of their local cultures... While these feelings were voiced most strongly on the right, the belief that reporters relied on stereotypical frames cut across party lines' (Wenzel 2018, p. 12).

Finally, as pointed out by Carson et al in their research around Moree, NSW (2016, p. 140):

Identity has an institutional dimension as well. The federal and state electorates, the local council boundaries and the police district broadly share the same geographic footprint, from Goondiwindi in the north to Narrabri in the south and Collarenebri in the west. This provides a commonality of interest for the community and is reflected in the reach of the local media.

2.8 Managing local news provision

2.8.1 Citizens versus consumers

There is no direct Australian research on consumer attitudes to publishers and broadcasters being required to provide local news. It may be that the growing level of news avoidance – which is slightly higher in regional Australian news consumers (Fisher, Park, et al. 2019, p. 115) suggests there would not be much support for regulatory obligations. However, the research does give some insight into the views of people when addressed as, and acting as, citizens. Public inquiries have consistently found that citizens are concerned about the level and quality of local journalism, particularly in the regions (Department of Broadband Communications and the Digital Economy 2012; Finkelstein & Ricketson 2012; Flew & Swift 2013; Freeman, Hess & Waller 2017; Senate Select Committee on the Future of Public Interest Journalism 2018). While many of the submissions to these inquiries are made by organisations such as local government authorities, those organisations are likely to take account of the interests of their constituents. This engagement with public inquiries could suggest that Australians do see some role for the government in at least monitoring the environment for local news. A combination of quantitative and qualitative research may be needed on this issue and the framing of that research may need to take into account this citizen/consumer dichotomy.

2.8.2 The value of diversity for localism

Current quantitative research directly asking consumers about whether they think diversity in sources is important for local content specifically, does not exist. However, several pieces of research allow us to piece together an idea of consumer attitudes.

A 2006 report by the Communications Law Centre (Dwyer et al. 2006), based on case studies from four regional locations, found that audiences valued ABC Local radio because it provided a 'credible alternative to the journalism of the local paper' (p. xii). This seems to imply that audiences see local diversity as a type of quality control. Similarly, ACMA's regional report 2013 contains analysis of the 24 public submissions. It notes that most felt they were receiving less local news, with submitters highlighting the importance of choice of sources in maintaining levels and quality of content (ACMA 2013, p. 18).

It can also be said that diversity of sources is valued for its different affordances, both in terms of content and different lifestyle compatibilities. Quantitative research points to different sources being accessed for different content. Newspapers are used to obtain sports news; websites are used for weather (ACMA 2017d, p. 1). The fact that different sources are used for different types of content is borne out by qualitative research of two regional communities in Australia¹² which discovered that community members valued the local newspaper because 'newspapers contain more information and cover a wider range of subjects than other media' (Richards 2013, p. 636). Academic research with audiences of community radio found that they valued the local programs for adding to the diversity of media content and voices (Meadows 2013). This is echoed in a survey commissioned by the Community Broadcasting Association of Australia (CBAA), Australian community radio listeners found 24% valued 'diversity in programming' as a reason for listening to community radio (McNair yellowSquares 2018, p. 42).

Overall, TV broadcasts are the most common form of media used by Australian news consumers (Fisher, Park, et al. 2019, p. 26) and even more so when it comes to regional Australia and this may be because of the audio-visual medium being valued for its specific affordances. In regional Australia, 46% of news consumers nominate TV as their main news source compared to 39% in cities. This higher TV watching may be correlated with demographics such as higher age, lower education and a higher proportion of Indigenous Australians. It appears diversity of sources is especially important for local communities with significant Indigenous populations. Research has found that additions to the mix of Indigenous media sources – principally visual and audio sources – are valued by communities as they allow Indigenous communities to have their own news through which to reframe events; they allow cross-cultural dialogue between Indigenous and non-Indigenous; and radio and TV help keep alive Indigenous language and culture (McCallum & Waller 2017; Meadows 2015). More generally, other research (Fisher & Park 2019) highlights the proportionally higher use of TV by regional Australian news consumers which correlates with, and may be a result of, the older demographic and lower education levels of regional Australia. The earlier 2006 research of the Communications Law Centre found that the value of TV was based on its 'publicity of community events not journalistic value' (Dwyer et al. 2006, p. xii). Muscat's research on TV use in suburban Sydney found that TV use was related to ease of use in terms of fitting into existing routines (Muscat 2018).

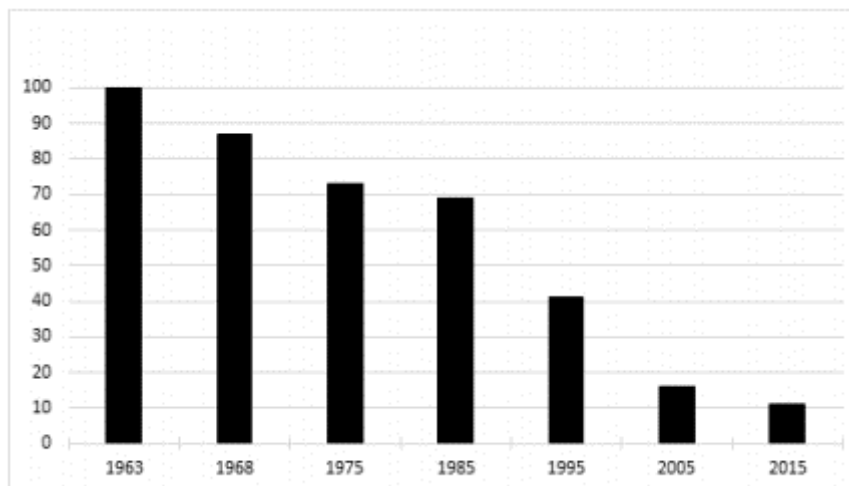
Taken together, this qualitative research gives a picture of diverse forms of local news being valued for their different offerings which suit different people for different reasons, but also for encouraging, through professional competition, quality levels of all types of media.

¹² The same study also examined the Canadian town of Victoria and found congruent results.

Ownership

Diversity of owners has been covered in Chapter 3, however, there is some specific data for regional Australia regarding commercial television ownership and control. 'This 'independence quotient' (shown in Figure 2.28 below) has been derived by calculating the total number of controlling entities as a percentage of the total number of licences in operation at a given point in time' (Thurlow & Griffen-Foley 2016, p. 118).

Figure 2.28 Independence quotient, 1963-2015



Source: (Thurlow & Griffen-Foley 2016, p. 118)

2.8.3 Understanding how digital dynamics impact local news visibility, use and market

Digital and the local

In 2013 Curran et al conducted a nine-country comparison of popular online news sites, which included Australia, and found that popular online news sites are nation-centric. Furthermore, online news 'is also a vehicle of authority rather than a voice of the people' (Curran et al. 2013, p. 893). While Curran and his collaborators were concerned with puncturing the received wisdom that online news was a force for globalisation and people power, the nation-centred result also clearly shows that online news can dismiss the local. A comparison of online brands accessed by Australian news consumers in 2018 and 2019 seems to support Curran's analysis: the *Digital News Report* shows increasing consolidation among fewer big brands. Use of regional and local websites also fell slightly from 11% in 2018 to 8% in 2019 (Fisher, Park, et al. 2019, p. 31; Park et al. 2018, p. 54). Nielsen figures for the top 20 news websites from 1 May 2018 until 30 April 2019¹³ show that the top 9 sites are all major players however, the Australian Community Media Network does come in at number 10 on the list with average visitors per month of 2,715,779.

Richards' Australian research in Mount Gambier and Naracoorte also questioned the value of online for local news, particularly for those demographics most likely to use online. The major source of information for all teenage refugee participants was the

¹³ Data provided by ACMA

internet, which was described as the best way to find out about the world, although it was said to be 'not so good' for local information (Richards 2014, p. 11).

On the plus side, connectivity in regional Australia is rising and this is visible in that the use of mobile phones for news is rising more steeply than in metro areas (Fisher, Park, et al. 2019, p. 114). However, there is still an infrastructure gap, and communities feel it is disadvantaging them as news moves online. Qualitative research in the rural NSW towns of Boorowa and Crookwell found residents were wary about heavy reliance on the internet for local news and information

Traditional media such as community newspapers and radio were slowly disappearing either by merging with other communities or shutting down altogether. They increasingly rely on the internet for local information, which was perceived as 'becoming disconnected' and 'being forgotten' (Roger). As the world gets more and more reliant on this technology and these ways of communicating I think that it's a terrible thing that some sections of society are going to be alienated and disengaged from all of this. (Graham) (Park, Freeman & Middleton 2019, p. 148)

These residents also felt the digital divide to be deepening as infrastructure was not keeping pace with the movement of services and information to online with 'health, communication, education and social dimensions' (Park, Freeman & Middleton 2019, p. 149). In a similar vein to the submissions to the ABC Inquiry regarding the use of the ABC during emergencies, these residents also feared safety consequences due to the decline in communication services (Park, Freeman & Middleton 2019, p. 149).

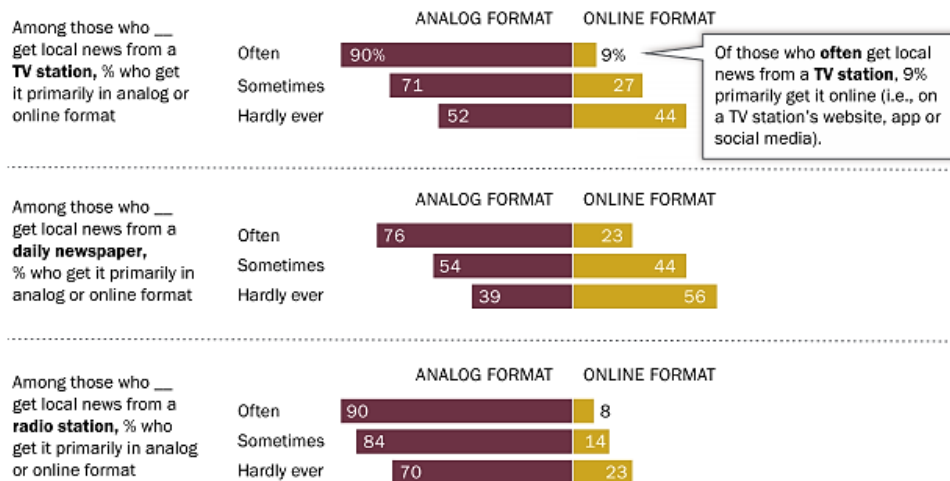
Freeman and Hutchins conducted an analysis of available international and Australian research and also drew on Australian case-study examples to try and understand the impact of digital dynamics on both local media and council produced information. They argue that the move to digital citizenship forums is most problematic for political participation at the local level because of limited opportunities. They found that the problems with digital communication and citizenship practices did not exist on the same level for national and state levels of governance and political participation (Freeman & Hutchins 2016, p. 26)

That online news is not necessarily filling the local news gap is perhaps also seen in the differences between city and country when it comes to willingness to pay for online news. This has increased from 2016 to 2019, in both urban and regional areas, however, the gap in the paying for news between metro and the regions has not narrowed. In 2019, only 12% of regional news consumers say they have paid for online news. This is still a lower figure than 16% of urban news consumers who say they have paid for online news (Fisher, Park, et al. 2019, p. 115).

Just like in Australia, research around the globe shows the steady increase in online sources for news – including local news. The Pew Research Center conducted a survey of 34,897 US adults from 15 October 15 to 8 November 2018 on the Center's American Trends Panel and Ipsos's Knowledge Panel and found almost as many news users prefer to get their news online (37%) as the TV (41%). (Pew Research Center 2019, p. 3). There is a seam of research trying to discover what this means. In Pew's study, several variables are noted. Figure 2.29 shows, for example, that in the group of consumers who prefer to consume the digital offering of traditional news services, there are more light consumers of local news than heavy consumers; this is true across the three formats TV, print and radio. Pew also notes that 'U.S. adults who prefer getting

local news online are less likely to follow local news very closely (21%, compared with 40% among those who prefer TV) (p. 12).'

Figure 2.29 Frequency of local news access by platform type: analogue and online formats



PEW RESEARCH CENTER

Source: (Pew Research Center 2019, p. 18)

Hindman brought attention to the digital impact on local news in 2007 conducting analysis of audience concentration among top 100 radio stations, magazines and newspapers and audience concentration for the top 100 English-language websites. He found that online you need size to survive and 'online content is more concentrated than content in traditional media' (Hindman 2007, p. 338). Further research confirmed the digital audience of regional papers remain tiny with metro papers taking most of the digital eyeballs (Hindman 2015). As distribution channels multiply, this only compounds the problems smaller players face. The larger the organisation the more likely it is that it can invest in tailoring its content for the vast array of online distribution channels. The investment required is substantial. Even significant regional metropolitan mastheads such as the *Los Angeles Times* and *Chicago Tribune* have struggled to post on multiple distribution platforms (Rashidian et. al. 2018 p. 7). Market overview research from the Department for Digital Culture Media and Sport (2018, p. 62) similarly found local and regional press were the entities most in trouble due to their lack of size hampering their ability to generate profitable income online. This was further compounded by the 'low propensity [of consumers] to pay for news online' (p. 58)

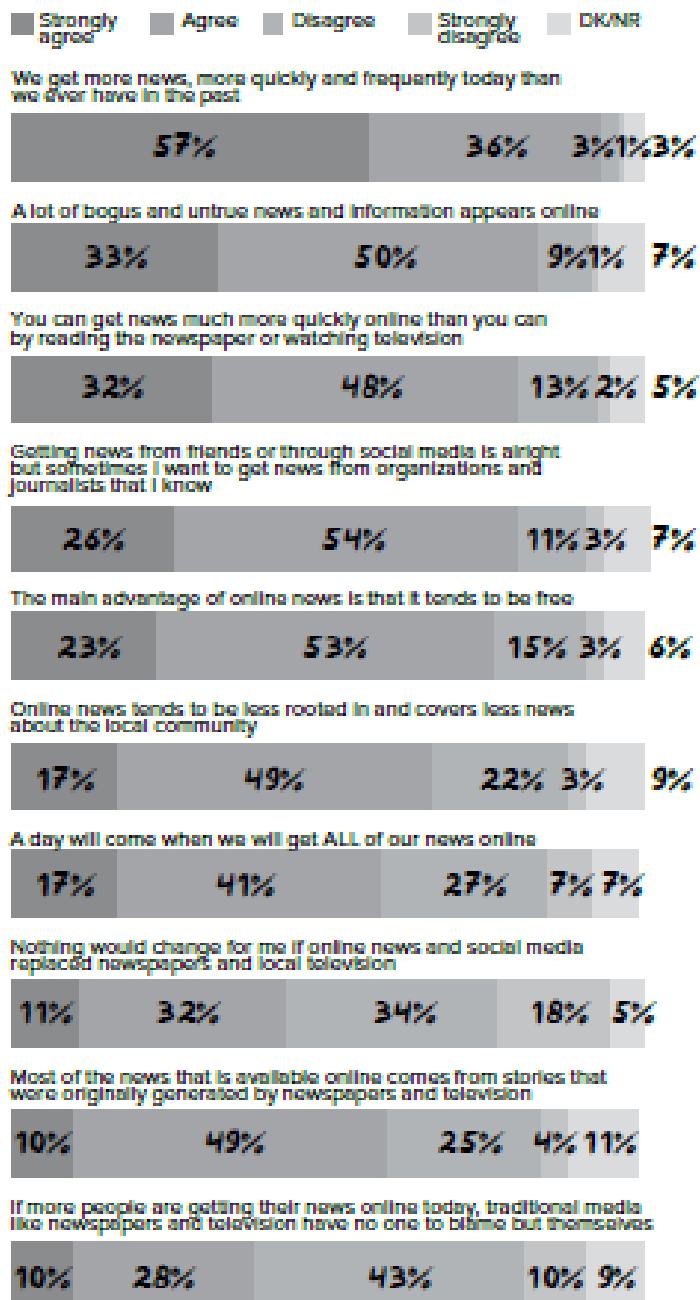
Focus group research in four US cities, with participants recruited on the basis of having experience receiving news via tech platforms, found 'whether explicitly or implicitly, participants often framed platforms as environments where local news was subjugated to national/international news' even though they followed people from their local area (Brown, Wenzel & Roca-Sales 2017, p. 4). They described platforms' 'weakness at

reliably surfacing local news' and an ongoing reliance on legacy media for local news (p. 27) although, of the digital platforms, they described Twitter as best for local news.

Lie (2018, p. 54) interviewed people about their Facebook and local press use and among other points highlighted the correlation between the younger generation's greater use of online compared to older generations and that younger generations have a more international outlook compared to older generations' local outlook. In contrast, in Sweden, Wadbring & Bergström (2017) looked at different media use by generation type (i.e. Generation X, baby boomers etc) and found that the crisis was not a problem of local news but an issue with the print industry and changing consumption patterns.

With audio too, online consumption does not seem to favour local news. In Canada, a nationally representative survey of 1,662 people discovered local news is the least likely to be listened to online, although three in ten do so. Music, on the other hand, is twice as likely to be listened to online, according to six in ten Canadians (EKOS Research Associates Inc. 2018, online). Focus group participants backed this survey result with comments that associated local content with traditional analogue radio such as: 'For me, listening to traditional radio is really about finding local content.' (St. Boniface, translated)" (EKOS Research Associates Inc. 2018). Separate research consisting of an online survey of 1,500 Canadian adults (random sample – not nationally representative) asked a series of questions regarding the impact of online news and the media. Figure 2.30 shows that two thirds (66%) agreed or strongly agreed that online news 'tends to be less rooted in and covers less news about the local community', while a majority (52%) disagreed or strongly disagreed with the proposition that nothing would change for them if online replaced newspapers and local TV (Public Policy Forum 2017, p. 47).

Figure 2.30 Agreement with statements regarding online news



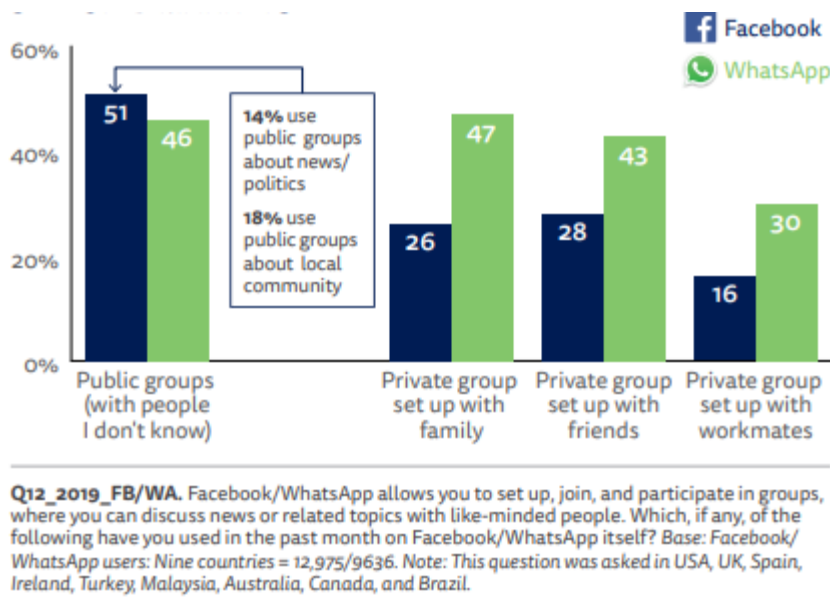
Source: Eamscliffe Strategy Group

Source: (Public Policy Forum 2017, p. 47)

Qualitative academic research with self-identified local online news consumers, using data from six focus groups across three communities in the US, found a phenomenon with US audiences of local online news believing there is enough local news available through various sources and it is their responsibility (sometimes described as a burden) to find that news (McCullough, Crowell & Napoli 2017).

It is also not yet clear how the new tendency to create chat groups on Facebook and WhatsApp will influence local news consumption. According to the *Digital News Report 2018* sample drawing on several countries (including Australia), there is a minority of news consumers who use these public groups for news (not necessarily local news) and for local information (14% and 18% respectively, as shown in Figure 2.31 below). However, the authors note: 'We find that people who used groups in WhatsApp and Facebook have lower trust in the news and are more likely to use partisan news sites' (Newman et al. 2018, p. 19).

Figure 2.31 Proportion of Facebook and WhatsApp users that used each type of group in the previous month



Source: (Newman et al. 2018, p. 41)

In some positive research via a manipulated experiment, it was found that local tweets resulted in more user engagement than national tweets and even more so from young people (Houston et al. 2018). However, younger users also preferred *opinionated* local tweets most of all (p. 13).

A final point on the role of digital and the local is that traditionally a key element of a local newspaper was the classifieds section. However, for a consumer interested in who is selling what, when and locally, online works just as well, meaning that particular expectation of a type of local news is still being met. It also means the collapse of revenue for local newspapers who used that revenue to fund their journalism is highly significant. This is discussed widely in Australia; however, Canadian research has focused on the specifics of classifieds in slightly more depth, tracking the decline of this revenue, as shown in Figure 2.32 below. The same research highlighted the importance of that decline in terms of the future of local news.

Figure 2.32 Total print classified advertising revenue, Canadian daily newspapers, 1995-2015 (\$millions CAD)



Source: (Public Policy Forum 2017, p. 17)

2.8.4 Assessing public impact

A recent framing article by Australian academics in *Journalism Studies* highlighted the issue of measuring media impact. And that ‘assessing and defining the concept of media impact is a topic of debate among practitioners and scholars, particularly in the United States where philanthropists have responded to the perceived crisis in investigative journalism by funding not-for-profit newsrooms’ (Simons et al. 2017, p. 1403). This is raised this as an issue because the international experience might suggest that there can be significant organisational burden on preparing reports for philanthropic funders. If this were to be the case, larger media organisations would be advantaged over smaller ones.

Ali (2016, p. 118) argues that the UK, and Ofcom in particular, has made the right decision in defining journalism as a ‘merit good’ as ‘a policy approach based purely on market fundamentalism would fail to recognize such positive externalities’. For local news specifically, Barnett (2015, p. 336) praises the ‘social gain’ definition attached to community radio:

There are four mandatory social gain objectives: providing a service to a community otherwise underserved; facilitating ‘discussion and the expression of opinion’; providing education and training; and ‘achieving a better understanding of the particular community and strengthening the links within it. (DCMS 2004).

McDowell and Lee (2007) note the FCC’s approach to localism involves consideration of local program selection as well as local news quality and quantity (p. 177). They argue that policy needs to go beyond content:

Although program content is the most prominent focus of debates about localism, policy approaches to assess localism should examine the broader context, including the processes whereby programming decisions are made, and the characteristics of station operation and management (p. 178).

They set out the kind of factors that could be taken into account in an approach that uses multiple criteria and also urge the FCC to adapt the reporting obligations of broadcasters so that adequate information can be collected (p. 186). Broadcasters would then provide

a 'self-certification report' which would include aspects such as local ownership, management integration into the workplace, location of main studio, aspects of local outreach and aspects of local programming (see pp 187-88 for an outline of these factors).

Nielsen, meanwhile, has argued that thinking of the entire communication ecosystem would mean characterising local newspapers as 'keystone' media in the same way that there are 'keystone species' in biology. 'Keystone media are characterised by their *systemic importance*, their importance not for the majority of users, but for the wider information environment they live in' (2015, p. 54 original italics). A view which receives some support from another study which has used longitudinal data to link citizen engagement data to the deterioration of local news media. Tracking the same individuals over time and simultaneously measuring changes in media content in their communities reveals that reductions in citizens' political knowledge and participation follow declines in coverage about congressional elections. (Hayes & Lawless 2018)

Finally, Napoli and his collaborators have developed a method which allows for comparison of local news environments by reducing news units of content and quality to a per capita basis. Figure 2.33 below shows this was applied to three different communities and drew a picture of very different local media environments with one of the communities being served far better than the other two.

Figure 2.33 Town characteristics and level of journalism provision

Town	Population	Per capita income (\$)	Percent minority	Number of journalism sources	Sources per 10,000 capita	Social media presence score
Newark	277,000	\$13,009	74	16	0.58	80
New Brunswick	55,000	\$16,395	55	13	2.36	81
Morristown	18,000	\$37,573	37	11	6.11	68

Source:

(Napoli et al. 2017, p. 385).

As noted by the authors, the differences are concerning and raise issues of equity.

It does seem reasonable to question whether the fact that a smaller, wealthier community such as Morristown has over 10 times as many journalism sources per 10,000 capita than a larger, lower-income, more ethnically diverse city like Newark represents an appropriate and acceptable differential. Similarly, when we look at communities that are more comparable in terms of population size (i.e., Morristown and New Brunswick), it seems reasonable to ask whether the 2.5 times differential in journalism sources per 10,000 capita that we found between Morristown and New Brunswick is simply a reflection of economies of scale, or whether other factors such as income and/or ethnic composition of the communities may be playing a role (Napoli et al. 2017, p. 385).

2.8.5 Localism initiatives and regulations

Internationally, there has been some discussion about the role of government in local news provision. As noted by the *Cairncross Review*:

Of all the areas where intervention to support high-quality journalism is justified, local democracy reporting is the most urgent and important. The loss of coverage by professional reporters of the machinery of local and regional government is a serious issue for a democracy. (Department for Digital Culture Media and Sport 2019, p. 88)

In the Netherlands, a localism initiative which has met with success involved giving residents from a 'problem neighbourhood' three months of training of one day per week, and then dividing them into editorial groups responsible for a weekly TV program of 10-15 minutes, broadcast by the regional public newscaster of Utrecht. The 'You in the Neighbourhood' pieces allowed residents to redefine their neighbourhood without shying away from its problems. It also allowed greater understanding between fellow residents by telling more stories of the neighbourhood, leading to a greater social cohesion (Costera Meijer 2013).

In 2016, Tow Center for Digital Journalism at Columbia's Graduate School of Journalism ran a focus group with similarly stigmatised community in South Los Angeles and found an appetite for less negative reporting and more solutions-oriented journalism (Wenzel, Gerson & Moreno 2016).

More recently, the 'Report for America' is attempting to provide support for local communities as sources of local news. Launched in 2017, it has 61 fellows and operates in partnership with some 50 news outlets across 28 states and Puerto Rico, and received startup funding from Google among others. However, recent case studies highlights that gaining traction in changing the ecosystem will take time and especially as its reporters are being confronted with the lack of trust of mainstream and larger regional news providers which exists in the local communities they are targeting (Wenzel et al. 2019).

The BBC Local Journalism Partnership, launched in 2017, involves:

- 150 journalists funded by the BBC and employed by a range of qualifying news organisations to cover local authorities and public services; the reporting done by these journalists will also be made available to the BBC.
- Archival footage and audio news content produced by the BBC to be made available to local news media websites.
- A set of data journalism tools to be funded by the BBC and made available to its partners in the local press.

The first 143 full-time journalists and two part-time journalists had been named and contracted by around 60 news organisations in England, Wales and Scotland. These organisations will receive a share of (initially) £8m a year. Most of these contracts have been won by the largest publishers. (Department for Digital Culture Media and Sport 2018, pp. 71-2)

In Canada, the recent review of broadcasting policy has led to changes which will see:

- Licensed terrestrial broadcasting distribution undertakings (BDUs) allowed to devote part of their local expression contribution to the production of local news on local television stations;
- Direct-to-home (DTH) BDUs allowed to devote part of their contribution to Canadian programming to the production of local news on local television stations; and financial support available to independent local television stations (i.e. stations that are not part of large vertically integrated groups) through the creation of the Independent Local News Fund, which will replace the Small Market Local Production Fund. All licensed BDUs will be required to contribute to the new fund.

2.9 Gaps

- In Australia, it is not known the exact number of closures and cutbacks impacting local news provision. The New Beats research gives a clue through tracking journalism job losses but it is a proxy, and an imperfect one at that. Unlike the US, the UK and Canada there is no large-scale project aiming to capture the changed local media landscape, despite the fluctuating regional market. This includes the closure, announced in late June 2019, of four regional TV News bureaus by WIN and the continued instability surrounding the more than 160 regional and local titles (part of the former Fairfax stable, which have changed hands twice in less than a year).
- Perhaps surprisingly, the greater use of digital platforms does not seem to have led to a greater number of sources being accessed in regional Australia. In fact, the Centre for Media Transition commissioned research shows the opposite with the number of news consumers accessing four or more sources going down in both urban and regional centres (Fisher & Park 2019). These figures are not specific to local news and it is not known whether this is the result of the loss of newspapers and other local sources of news, or whether it might be related to reported growth in news avoidance.
- There is no direct Australian research on consumer attitudes to publishers and broadcasters being required to provide local news.
- Furthermore, the number (if any) of communities that are upset about lost local media is not known, nor how upset they are (if at all) and why – what did they value which is now missing. It is known that local news is valued right now but will it continue to be valued in new forms? There is no research which asks about the current dip in valuing local news as ‘very important’ (seen in the data files of ACMA’s regional research discussed in section 2.4.1). It is not known whether this change in sentiment is a result of more general attitudes towards today’s news-scape or whether there are specific factors affecting local news.
- Analysis of data from the *Digital News Report* shows that a high level of interest in news is consistently lower outside metropolitan areas, with fewer people in regional Australia saying they are heavy consumers of news. Regional news consumers are more likely to critique media for being overly negative. But there is no research to explain why these differences exist and how this relates to the role of local news specifically.

- The Australian hyperlocal news landscape is poorly documented and poorly understood compared to overseas. Furthermore, the overseas literature shows that there are complex socio-economic dynamics acting as enablers and preventers of hyperlocals and there are also cultural dynamics at play with some countries more enthusiastic than others. It is not known whether Australia's socio-economic and cultural components can act as enablers of hyperlocals or if in fact most Australians are not interested in developing this time of media.
- In several key pieces of research specific questions about social media are not asked, for example ACMA's age-specific data from its regional report does not look at social media. Of particular interest is the research by McCollough, Crowell & Napoli (2017, p. 113) which found focus group participants discussing the seeking of local news online as a burden that required effort and self-reliance. As noted by the authors, this would need verification to see if it is a more generalisable phenomenon.
- There is little current Australian or international research asking consumers specifically about the watchdog function of local news. Given the predictions of its near demise this seems like a clear and pressing gap. Given the variety of initiatives involving community members in the international literature, consumers might also be asked what solutions they would propose.
- Finally, there has been some interesting work done overseas on different theoretical frameworks and practical measurements for evaluating the social impact of local news. This could be a fruitful area of research helping to underpin strategies to assist this period of media transition.

Conclusion

This report has examined the existing evidence on Australian consumer use and attitudes to news and current affairs regarding *diversity* and *localism*. It forms part of a broader review of literature and research that was conducted by the CMT covering four separate topics: impartiality, commercialisation, diversity and localism. The material related to [impartiality and commercialisation](#) was published by the ACMA in January 2020.

The academic literature reviewed in this report indicates that both diversity and localism are valued by consumers; however, what this means in terms of consumer behaviour and how this plays out in a changing news ecosystem is not as well understood.

Below, the CMT seeks to use this conclusion to highlight areas for further research. We make particular note of studies from overseas which may be useful to replicate here and local and overseas research which we found particularly insightful.

Diversity

The larger picture of diversity is that while news media diversity has identifiable value for the Australian public, its importance and availability remain comparatively underexamined.

Diversity in Australia has usually been approached in terms of media ownership or in terms of the range of media sources available in the market, and then in terms of ownership of those sources. These are important aspects of diversity, but they do not account for other forms of diversity and will be too narrow in scope if limited to the regulated platforms of commercial television, commercial radio and associated newspapers.

In the gaps analysis we identified some specific omissions in the literature relating to diversity in the production, distribution and consumption of news and current affairs in Australia. These included:

- the mapping of the contemporary news media market in Australia, including online media, community media, Indigenous media, culturally and linguistically diverse media etc;
- the tracing of content supply arrangements and an analysis of viewpoint diversity in different media platforms;
- quantitative and qualitative research on how people access and use news media, leading to a measure of how important some sources are compared to others;
- research on what Australians understand by 'media diversity' and then how they value it and how they value journalism's contribution to democratic society.

As it would be impractical to suggest any research agenda could take account of all the gaps we identified, we make the following observations on what we know about media diversity in Australia and how we might better understand it.

- The *Digital News Report* provides valuable information on, for example, the number of people who access television, radio and print for news. But the depth of analysis on traditional media is far more limited than the analysis of digital media use, which is where that study excels. As other surveys and qualitative research on consumer use and attitudes are ad hoc, there is a gap in understandings of what attracts consumers to traditional media sources, what they value, how they access the content via other platforms, and how they use these platforms in conjunction with digital media. Andrew Jakubowicz's comments on the risks in minority audiences drifting to social media suggests there is a need to understand this experience but his point is of wider application – the attempts to understand audience views on the failings of mainstream media are ad hoc and may be time dependent or event related. A research series could assist by measuring attitudes on a regular basis.
- Among the most intriguing and least understood aspects of media diversity is the impact, potentially both positive and negative, of the algorithms deployed by digital platforms to affect choice diversity and use diversity for news consumers. As algorithms are altered, the supply and use of news by consumers, and their understanding of where that news has come from, are also likely to change. Attempts to regulate digital platforms may have intended and unintended consequences on the supply of news, especially in aggregate. A related emerging area is the impact that automation, powered by machine learning, may have on the supply and consumption of news. These areas are under investigated, especially in an Australian context. Research could be conducted to investigate ways that these could be used to contribute to rather than diminish levels of consumers' media diversity.
- Also on digital media, we were struck by the recent work by UK regulator Ofcom on the divergence between self-reported online media use and actual usage in practice. Its qualitative work (Ofcom 2018d, p. 13) found that actual online usage was often under-reported, with participants wishing to present themselves as having a broader news diet in terms of source. This brings up multiple questions for potential further inquiry: are news consumers more or less passive in online environments; do they consider online news to be an inferior form of news (or traditional news superior); do they know when they are consuming news on a mobile phone; and can they less readily identify the source of news in digital environments?
- The 'boxed section' on standpoint diversity by Andrew Jakubowicz illustrates the term's breadth and points to many of the shortcomings in current research. His argument: the marginalisation of certain standpoints (both in practice and scholarship) can undermine the democratising promise of media in a democratic society. The CMT appreciates that discussion about standpoint diversity is not central to the concerns of this review. But we also appreciate its pertinence to any debate about what news media can and perhaps should do, and look like, in a multicultural society.

Localism

Local media are clearly appreciated in Australia for their community-building role. However, it is equally clear from the review of the literature that there is more to know about how consumers interact with local news online and what impact the accessing of news through online mediums has on the amount and type of local news consumers receive. Australian quantitative and qualitative data looking specifically at local news habits in the online space is scant and potted. This data is needed to be able to tap into the international discussions regarding the unique challenges to localism through the transition to digital.

A concerning finding in Australia is the alarm bells sounding regarding the loss of the local watchdog and journal-of-record functions. A mapping exercise to help determine the state of play, and provide a baseline for longitudinal analysis, is missing. Mapping attempts from overseas could be investigated and improved upon. In this exercise, understanding service to local communities would be useful but also crucial is consideration of the type of news service; bearing in mind the importance that Australian consumers place on local news to participate in public life (Roy Morgan 2018a, p. 28).

Given the specific news challenges of Australia in terms of distance, which is magnified in the case of picture-reliant TV news, the impact of 'hubbing' services would need to be investigated. However, it is important to recognise that consolidation of newsrooms is not only occurring in regional and rural news services. A recent concern of scholarship both in Australia and overseas is that the important role of suburban news services, and the changes taking place there have been somewhat overlooked.

One of the most interesting findings from the review of literature on localism is the difference between the UK, US and Australia when it comes to understandings of, and attention to, hyperlocals. In some respects, this may be a natural result of the smaller media market which exists in Australia and which therefore means that there are not the numbers of hyperlocals to draw the attention of study. However, the recent *State of the Regions Report: Availability of Local News and Information* (Simons & Dickson 2019) shows that hyperlocals are active and do have an impact. This type of journalism is, in some cases, stepping in to fill a void left by the closure and cutbacks of professional news, particularly newspapers yet it is not like for like. This early research also raises concerns about the partisanship of local news delivered in this form; in short, the assumption that a significant proportion of local news, in whatever form, will be public interest journalism, may be outdated.

In particular, any investigation in this area could take heed of the lessons from overseas regarding the different ways in which hyperlocals operate in communities which are disadvantaged and have suffered stigmatisation. Australian and overseas evidence suggests that these communities need truly local media more but the international evidence on hyperlocals shows they are also less likely to be able to start and support hyperlocals.

Concluding observations

This report, and the previously published companion report on impartiality and commercial influence, illustrates the all-encompassing nature of change in the news media landscape. None of the areas we examined has been left untouched.

For those earlier topics of commercialisation and impartiality, we concluded by noting the challenge for researchers in adapting their own practices fast enough to understand these changes in industry and consumer practice.

But diversity and localism are about something more fundamental than current practice: these are long-valued features of a mature media environment that serves local and national communities. At least some aspects of both localism and diversity are already carefully monitored by regulators. But there is an amber light here, too, on account of what we do not yet understand about the sources, range and consumption of news in Australia, especially in an environment where business models are challenged and consumers are less likely to seek news directly from those who produce it.

Here, the challenge is not just for researchers, but for public policy and regulation, which must also adjust to the changing environment.

Appendix

Important notes on survey samples referred to in this report

Every effort has been made to ensure that data and any analysis of data is presented in this Literature Review Report so that it includes important notes about the data source to enable the reader to interpret findings appropriately. However, in some instances there are additional notes to further understand the data that should be referred to in the original source.

Some notes on key sources referred to in this report are provided below.

Key Australian sources

Digital News Report (DNR) series

The methodology overall has remained consistent over the years of this international study, with necessary minor modifications that are noted in the reports. The DNR 2019 Australia report notes that 'Core questions were asked in all 38 countries in order to provide an international comparison. The questionnaire and the overall project methodology were consistent across all territories.'

The DNR 2019 Australia report is based on an online survey of 2,010 respondents, weighted to targets based on age, gender and region.

DNR refers to 'news consumers' and 'Australian news consumers'. The term 'online news consumer' is used for news consumers who use online news (e.g., see 'paying for online news and donation') which is not the same as the full sample.

In this Literature Review Report, the terms used in the DNR report are used, but it should be noted that findings based on total sample are representative of 'news consumers who are online' (because (a) the DNR is an online survey and (b) the sample eliminates people who have not used news in the past month).

Methodology note at the beginning of the Australia DNR 2019 report is that:

The survey was conducted by YouGov using an online questionnaire at the end of January/beginning of February 2019. The sample was drawn from a panel of 72,242 online Australians. The final sample is reflective of the population that has access to the internet. To be included, respondents must have consumed news in the past month. As a result, 11% of the initial survey respondents were excluded. The data were weighted to targets based on age, gender, and region to represent the total population of each country. In Australia, a quota based on Australian Bureau of Statistics census data was set using gender, age, region, and for the first time, education.

Australian sample

As this is an online survey, the results will underrepresent the consumption habits of people who are not online (typically older, less affluent, regional residents, and those with limited formal education). The survey in Australia was conducted in English and does not represent the linguistic diversity of Australia.

ACMA – Local Content in Regional Australia: 2017 Report (ACMA 2017a)

Regional Australians' access to local content—Community research: included a survey of regional Australians' awareness of, use of and preferences for accessing local content and local news. The research was conducted in September and October 2016.

A total of n=2,457 computer-assisted telephone interviews (CATI) were conducted with a sample of regional Australians aged 18 years and older who did not have access to metropolitan television. Detailed quotas were set to ensure the sample was representative by age, gender and location. The sample was also boosted by 350 interviews in each of SA and WA to ensure there was adequate representation of respondents who lived in those states.

Households were recruited through random-digit dialling using a dual-frame sample design and included those who live in a household with a fixed-line telephone (50 per cent) and those who have a mobile phone (50 per cent).

The weighting process accounted for the overlapping sample design (landline and mobile) and the relative chance of selection by area.

ACMA Communications Report 2017-18 (ACMA 2019)

The ACMA commissioned survey for this report comprised a total of n=2,106 respondents (n=1,843 online interviews with Australian adults plus n=263 computer-aided phone interviews (CATI) to reach the adult population who are not regularly online). The survey was weighted so as to be representative of the Australian population aged 18 years and over.

Jones, P. & Pusey, M. 2008, 'Mediated political communication in Australia: Leading issues, new evidence', *Australian Journal of Social Issues*, vol. 43, no. 4, pp. 583-99. (Jones & Pusey 2008)

This article incorporates data which comes from the Australian Survey of Social Attitudes, 2007. The sample comprised of 20,000 respondents selected at random from the Australian Electoral Roll which led to a response of 8,133 postal surveys returned. Post weighting was applied to correct for education differences between the sample and the population.

Roy Morgan – Consumer Use of News 2018 (Roy Morgan 2018a)

Online consumer survey of 2,031 Australian adults aged 18 years and over. The final survey sample (n=2,031) was weighted to the total population of Australians aged 18 or more based on September 2018 population data provided by the ABS. The weights were applied by age, gender and region.

Roy Morgan – Consumer Views and Behaviours on Digital Platforms 2018 (Roy Morgan 2018b)

Online consumer survey of 4,308 Australian 'digital platform' users (digital platform is defined to be a search engine, social networking site or other content aggregator site) who was aged 18 and over and living in Australia.

Minimum interlocking quotas were set for age by sex by region (metro vs regional) to ensure representativeness across those areas and sufficient numbers in each quota group to enable deeper analysis into each as required.

Unless referring to a smaller sub-group, overall findings are referred to as being representative of 'digital platform users'.

Key international sources

Ofcom News Consumption in the UK (Ofcom 2018c)

Ofcom's News Consumption survey has been conducted on a yearly basis, since 2013, using a face to face omnibus methodology. In 2017/18 the methodology was changed to a standalone survey using a mix of face-to face CAPI and online interviews. For the 2019 report the effective sample size is 3,245. Quotas were set to represent the population of each sampling point, which meant the overall quotas closely matched the population within each BBC TV region/Nation in terms of age (16-24, 25-44, 45+), gender and socio-economic group (AB/C1/C2/DE). Post-weighting was also applied for age, gender and socio-economic group.

Ofcom Adults' Media Use and Attitudes Report (Ofcom 2019a)

This report examines adults' media literacy. Ofcom's definition of media literacy is 'the ability to use, understand and create media and communications in a variety of contexts'. The report draws largely on quantitative results from the Adults' Media Literacy Tracker research. The Adult Media Literacy Research 2018 interviewed a quota sample of 1,882 adults aged 16 and over. Interviews were carried out across 225 different sampling points in the UK, face-to-face, in home. Quotas and post-weighting were used so the data is representative of adults aged 16+. The quotas and weighting were based on census data for age (16-24, 25-44, 45-64, 65-74, 75+), gender and socio-economic grade.

The *Adults Media Use and Attitudes Report* also draws on qualitative data from Ofcom's Adult Media Lives research (see below)

Ofcom Adult Media Lives (Ofcom 2019b)

Adults' Media Lives research is a qualitative, longitudinal ethnographic video-based project which has been running since 2005. The research has followed the same 19 participants over time, interviewing them at home to understand their relationship with digital media.

Pew Research Center 2019, *For Local News, Americans Embrace Digital but Still Want Strong Community Connection* (Pew Research Center 2019)

A nationally representative survey of 34,897 U.S. adults based on online panels from two different companies. For both companies, ATP and KnowledgePanel, panellists who do not have internet access are provided with an internet connection and device that can be used to take surveys. Interviews are conducted in both English and Spanish. Weights were applied for gender, age, education, Race/Hispanic origin, Hispanic nativity, home internet access, region/metropolitan status, volunteerism, voter registration and party affiliation.

Public Policy Forum 2017, *The Shattered Mirror: News, Democracy and Trust in the Digital Age* (Public Policy Forum 2017)

This mixed methods research included: a literature review, six roundtables across Canada, a symposium on digital news innovation, interviews with industry leaders and

experts, four focus groups in English and two in French as well as an online survey with a random sample of 1,500 adult Canadian respondents.

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