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## **Submission to the Select Committee on Future of Public Interest Journalism**

We welcome the opportunity to contribute to this significant inquiry into the Future of Public Interest Journalism, given the direct relevance of our research to the inquiry's terms of reference. Our expertise lies in documenting and analysing the digital transformation and restructuring of the Australian news media. Over the last decade, Dwyer and Martin have researched the rise in news aggregation and content sharing, changes to online journalistic practice and, together with Mi9 Share Wars and Nine News, the expansion of social media news sharing internationally. Between us we have had three Australian Research Council grants to study aspects of digital news transformation [LP140100148, DE130101267 and DP120101971]. In 2011-12 we also were funded by the Australian Press Council to write *Addressing Convergence*, a report on operational, legal and ethical challenges for publishers moving to online and cross-media news production (Martin & Dwyer, 2012). Martin is a former ABC journalist and producer, and along with O'Donnell has been a journalism educator for nearly two decades. Martin's speciality is online journalism. O'Donnell was the Lead Chief investigator on an Australian Research Council Linkage Grant (LP0990734, 2009-2012) which investigated the future of newspapers, and is also part of the New Beats Project team that holds two ARC grants, a Linkage (LP140100341, 2014-2017) and Discovery (DP150102675, 2015-2018), investigating the aftermath of job loss for journalists made redundant since 2012 as a consequence of industry restructuring.

It is often argued that the advent of a domesticated internet has delivered greater professional media diversity to Australian consumers and with it access to more quality journalism. Our submission questions the fate of *local* public interest journalism and news media diversity during the past two decades, and flags the critical lack of information that exists about the diversity of quality, local public interest journalism in Australia. We are particularly concerned about questions of news diversity due to the government's proposed changes to media ownership laws. While these may free up companies to respond to economic conditions, they will undoubtedly lead to local media consolidation that will not be balanced by new local online news sources. Loss of news media diversity due to digital media restructuring is one of the key concerns driving media pluralism policy reform in the UK and Europe, an issue we will explore later in this submission.

We argue that it is essential for government to study the impacts of social media news consumption and loss of public interest journalism on media diversity *before* it moves to enact changes to legislation that may reduce diversity or measures to support journalism that may not target the forms of reporting that are most lacking. Further, we will also argue that it is essential for government to understand the consequences of further local media consolidation for employment in the sector. With these two considerations in mind we will recommend research into how changes to digital news consumption and production are affecting local source and content diversity, as well as the size and composition of the media workforce.

Our submission will focus on the first term of reference: (a) the current state of public interest journalism in Australia and around the world, including the role of government in

ensuring viable, independent and diverse news services. However, we will also make brief comment on terms c) the impact on public interest journalism of search engines and social media internet service providers circulating fake news and d) the future of public and community broadcasters in delivering public interest journalism, as these issues relate to media diversity.

### **Public interest journalism and media diversity**

We understand public interest journalism as reporting that concerns issues of political, economic, social and cultural significance, with a focus on public affairs oriented content rather than lifestyle, leisure, entertainment and popular culture. To ensure a diversity of public interest journalism and media pluralism more broadly, Australian governments have enacted a range of legislative and other measures. These look to support diversity in two respects: first, to support rich *source diversity* in news providers, in terms of ownership, types of providers (public, private, not for profit etc) and the cultural diversity (race, ethnicity, gender etc) of the journalists working for these providers; and second, to foster *content diversity* in terms of different content genres and subject matter, and wide-ranging ideas and viewpoints, for example from rural and remote regions, as well as the city. Australia's diversity measures include cross-media ownership laws and public service media allocations to the ABC & SBS. Government however can do little to impact *exposure diversity*, that is the extent to which consumers might access, attend to and re-circulate news and information.

From 2008, when Australia saw the first large-scale journalistic redundancies due to digital news industry restructuring (O'Donnell, McKnight & Este, 2012), these diversity provisions have been undermined by the widespread loss of journalism jobs, and the merger and closure of news operations and publications. Australia has lost more than 2,500 mainstream journalism jobs since 2012 alone, about 20% of the journalism workforce (O'Donnell, Zion & Sherwood, 2016), mainly from News Corp and Fairfax Media as they struggle to accommodate Google and Facebook's capture of one-fifth of the world's advertising spend. Industry restructuring has already had profound effect on public interest journalism, in terms of the number and type of jobs available – particularly in regional areas. News Corp for example has closed seven community newspapers in Victoria alone, and closed its Gold Coast printing site, as well as sacking photographers and sub-editors at its metro titles. Fairfax has closed its offices in Kingston and Bordertown, SA and its Dubbo print centre, outsourced its sub-editing and production to New Zealand, and sacked its photographers. WIN has closed its Mackay and Mildura offices, joining the 2015 campaign by regional broadcasters for an end to television licensing and reach rules. For more details of job loss in Australian journalism, we refer the committee to the submission from the New Beats research team.

Increasing de-regulation of Australia's media over four decades has only contributed to the further concentration of media ownership and loss of source diversity, notably with News Corp buying APN News & Media's regional newspaper network and now being poised to acquire the Ten Network. Such cross-media consolidation will not benefit Australian voices, as claimed by vested industry interests; rather it will collapse the existing voices with the prospect of fewer local information options for Australian audiences. Australia's television and radio markets are still highly concentrated, with four largest players in each accounting for around 70% of revenues in 2015-16 (IBIS World, 2016). Concentration of newspapers, which provide most journalism jobs in Australia, is one of the highest in the world, with Fairfax Media, News Corp and Seven West Media accounting for more than 90% of industry revenue in the 2016 tax year (Dwyer, 2016b). According to an international media concentration lead by US scholar Eli Noam, Australian newspaper circulation was the most concentrated of 26 countries surveyed (Noam & the International Media Concentration Collaboration, 2016). Australia is now one of only five countries worldwide where a single owner controls more than 50% of the daily newspaper market (Molineaux et al, 2016).

Fewer owners has meant fewer job options, and with increasing content sharing across co-owned titles (Dwyer & Martin, 2012), also fewer journalistic jobs over all. Increasing syndication of news content has been a feature of the move of journalism online, with for example, greater reliance on news agency copy in breaking news and greater sharing of stories between mastheads. In 2009 Fairfax and News Corp rolled out standardised web templates for their suburban and community newspapers, enabling them to share information between hundreds of small publications. Both also outsourced hardcopy editing, layout and production - News Limited in Queensland with a centralised subbing hub, and Fairfax to PageMasters, which it co-owns with News Limited through their shared equity in Australian Associated Press. News sharing also enabled Fairfax to create two new metro news websites - Brisbane Times and WAToday with editorial staff of under 20 at each site, compared to the hundreds of journalists based at Sydney and Melbourne mastheads.

We note there is a tendency for industry figures to argue that new online media titles have compensated for loss of traditional media diversity, but this is not evident in terms of journalism voices or the economic capacity to finance more costly forms of investigative and public interest journalism. On reported figures, new local jobs in digital news publications total less than 10% of overall journalistic job losses. The local generalist news players are small, employ more freelancers than ongoing editorial staff and have little broad market appeal. The more successful are Crikey.com, from Eric Beecher's Private Media group and the *New Daily*. *New Matilda*, *Independent Australia* and *Online Opinion* are tenuous economic propositions, whose editors have all publicly discussed their struggles to meet costs through subscription and advertising. None of these local online publications appears in the top ten online news sources, according to Nielsen Digital ratings (Nielsen, 2017). Those new international franchises that do attract significant audiences and furnish more jobs include the *Daily Mail Australia*, *Guardian Australia* and *Buzzfeed Australia*. Yet neither their financial stability nor the jobs of their journalists is guaranteed. Their parent companies have also been hit hard by losses in projected digital advertising, with Daily Mail experiencing a 12% decline in newspaper advertising, Buzzfeed forced to halve its 2016 revenue forecast, and the *Guardian* laying off 300 staff in order to reduce its deficit. *The Conversation*, which is supported by universities in five countries, is hostage to the vacillating fortunes of higher education funding. Perversely too the BBC now ranks in the top ten Australian online news sites, competing with the ABC, an outcome which seems at odds with the UK broadcaster's national mandate.

Given the radical changes to Australia's media landscape over the last decade, it is surprising that there is very little robust data available about how the decline in traditional public interest journalism jobs, together with the increasing concentration of news media industry, has impacted on the country's media pluralism. As we have argued elsewhere, Australia's media diversity metrics to this point have excluded consideration of important players such as public broadcasters and community media and have not taken into account new online players (Dwyer and Martin, 2010). Researchers at the University of Canberra note there is also a strong perception, voiced in the Finkelstein Inquiry and since, that some areas regional and rural Australia are being abandoned by the mainstream news media. They argue too that we do not yet have a good understanding of how news journalism has changed in the regions in recent years:

Australia is yet to develop a clear picture of how its local and regional media is serving society's news needs, or a lively discussion about what kinds of industry, government and social actions will best ensure its health and wellbeing.

(Hess, Waller & Ricketson, 2014: 159)

For these reasons, Australia needs a more complete picture of digital media diversity before government leaps into further media reform, and certainly before it abolishes existing pluralism provisions.

## **Social media, diversity and media pluralism policy**

The 'media reform' package currently before the Parliament does not look to deal with these very serious issues of job losses, media concentration or loss of diversity. Rather it represents the government's attempt to do deals with the incumbent commercial TV networks and News Corp's Foxtel to ensure their economic viability. In fact, while chief executives of Australia's major media companies recently suggested the sector supports 30,000 jobs, their campaign to bring media regulation into the digital age and preserve industry viability makes no reference to media workforce planning, a topic that is rarely canvassed in media policy debates. So the current reform is a short-sighted political play rather than an effective attempt to tackle structural change in the media industries. This would require looking at how audiences are sourcing information, what information they require and how the government might support ways to maximise public interest content and source diversity. Instead, in the absence of reliable evidence for radical policy change, 'reform' has been understood largely in terms of deregulation.

Simply removing the last major remaining legislative bulwark against the concentration of media voices is not a solution to the crises engendered by international digital media competition. Repealing the two-out-of-three rule, for example, will not lessen the tremendous impact of internet hegemony Facebook and Google on news business models, given they now control around 85% of the growth in the online advertising market internationally (Meeker, 2017). Rather the Government needs to have a comprehensive review of how news is now being consumed across online and traditional media to implement effective policy. This must serve as a precursor to developing media diversity policies that address problems emerging from the changing news environment, such the capture of news media by social media platforms and subsequent threats to the authority and viability of public interest journalism.

For 29 per cent of Australians aged 14 to 30, social media is now the primary source of news (Australian Communications and Media Authority (ACMA, 2016). This means a dramatic shift in power to the behemoth new corporations sometimes referred to as 'GAFAM' (Google, Apple, Facebook, Amazon and Microsoft). There is now unprecedented global concentration of media power in the GAFAM group, and other second tier new media corporations such as Snapchat and Twitter (Bell, 2016). There is also constant innovation: Snapchat Discover, Facebook's Instant Articles and Google's 'Accelerated Mobile Pages' have been followed by Google's Digital News Initiative and News Labs, and also by Apple's News aggregator, Twitter's Moments and Facebook's *Live*. This leaves smaller news media players scrambling to adapt to the strategies of the IT giants, and vulnerable to changes in their search and aggregation strategies. This competitive vulnerability may need competition policy addressing, with provisions that ensure local media are not disadvantaged in terms of visibility in search rankings or feed aggregation. It may also, as other submissions to this inquiry will argue be important to support local content production through forms of tax or distribution subsidy.

However, it is critical that policy makers first better understand what constitutes quality, authoritative media diversity in the digital age. This requires a clear understanding of the limits of social media news production and consumption, as well as the negative impact of substantive workforce contraction on the industry's capacity to produce public interest journalism. Sustainable media diversity requires a viable workforce. While there are clear democratic benefits from more people publishing to, sharing and commenting on social media, most people are not citizen journalists, nor do they have the skills to undertake serious political, business, legal or industrial relations reporting. Social media news involves a great deal of recirculation of existing media content, and is an unknown and largely unmeasured aspect of media diversity. We argue Australian democracy still needs to be sustained by a viable workforce of professional journalists creating original news content that reports on matters of public interest.

This inquiry also acknowledges there are major risks in having more of the public inform themselves social media platforms – particularly the likelihood of them accessing fake news, and the effects of this misinformation on political process (as evidenced in the US and French national elections). Academic studies suggest that our online news sharing tends to promote favoured narratives and shapes politically polarized friend networks, the echo-chambers that signal limited exposure to news diversity (Quattrocchi, Scala and Sunstein, 2016; Song, 2016). It is also likely that those exposed to limited public affairs information may be disadvantaged as citizens (Pariser, 2011; Tewksbury and Rittenberg, 2012) and that unequal access to news and digital literacies may constitute new forms of digital divide (Thomas et al, 2016). If social media consumption is likely to limit rather than increase exposure to source or content diversity as was originally imagined, then there is a strong case for expanding, rather than doing away with media diversity policies.

Reimagining media diversity measures is not just a case of tweaking existing policy settings. Normative frameworks for sustaining pluralism have a long history in national media policy (Dwyer and Martin, 2010; Dwyer, Martin and Goggin, 2011), but these approaches have so far had little if any effect on the operation of the social media gatekeepers. Rather Australia needs to look more closely for approaches canvassed during recent media diversity inquiries (see Standing Committee on Canadian Heritage, 2017) as well the work of UK's Ofcom and the European Commission, which have both made significant inroads into monitoring, researching and updating voice pluralism policies for digital media environments.

Ofcom launched its Measurement Framework for Media Plurality (Ofcom, 2015) after an inquiry by the House of Lords (2014), and with effective critique from media and regulatory scholars (Barnett and Townend, 2015). Ofcom, at the request of Culture Secretary Karen Bradley, will shortly decide whether a full takeover by 21st Century Fox of BSkyB is in the public interest, based on these revised plurality policies and broadcasting standards. The European Commission's Media Pluralism Monitor (MPM) (KU Leuven et al, 2009) has also been developed through extensive scholarly work (Valcke et al, 2016). Australian policy-makers should consider how those regulatory bodies built a rationale for regulatory intervention in an online environment and how they frame current 'best practice' regulation in those jurisdictions. This work will involve analysing:

- (i) how concepts of media pluralism can be applied to new forms of online news consumption;
- (ii) the relevance of international media pluralism literature to the Australian context, in studying territories and experiences that may be outside our usual frame of reference; and
- (iii) how computational research methods can provide more fine-grained, cross-referenced pictures of diversity factors

These new approaches to assessing news media pluralism take into account industry, technology and audience consumption trends. While there is still debate among media scholars about what might constitute 'sufficient pluralism' (Gibbons, 2015), the different dimensions of pluralism in the European MPM approach (cultural, political, geographic, ownership, types and genres) as well as those of the Ofcom measurement framework (availability, consumption, impact, contextual factors) may both be helpful in thinking about this question in terms of the smaller more concentrated markets of Australia. The normative drive in European media pluralism —promoting a heterogeneity of media outlets, owners, and content—is arguably much more comprehensive and complex than the more practical notion of 'media diversity' seen in Australia (Hitchens, 2016), where law and policy are based on structural measures of ownership and control, and neglect online news, the public service broadcasters, pay TV and community media. The need to expand the scope of Australian regulation has been noted by Hitchens (2016) but preliminary attempts (Department of Broadband, Communications and the Digital Economy, 2012; Department of Communications, 2015) have been stymied by both Labor and Coalition governments (Flew, 2016), with reviews marked by entrenched party-

political positions (Senate ECITA committee, 2016) and the absence of evidence supporting either deregulation or further intervention.

### **Online news analysis: key trends**

Despite the relative sophistication of the UK or the EC pluralism measuring mechanisms, neither takes account of the ways in which news is now accessed and shared via social media, and what this means for the way journalists communicate with their audiences. They also have no way of assessing the impact or influence of regional media platforms such as those of the WeChat messaging app or weibo platforms in China, or the Naver and Kakao services in South Korea. These platforms are now important news sources for Australian ethnic communities, and yet do not figure in discussions of international competition, as the GAFAM do.

Given that social news sharing and other forms of digital news consumption are so widespread and influential, we argue that the following six trends urgently require further study in the Australian and regional contexts to determine their significance for public interest journalism and its contribution to media diversity:

- *News sharing and social media platforms* – eg. tracking the incidence and forms of sharing, liking, favouriting, retweeting, quoting and commenting
- *Locative and personalised news* – eg. tracking of online news users' preferences and to deliver personalised products, services, and advertising.
- *Automated and algorithmic news* – eg. 'automated journalism' or 'news bots', content production involving little human input; the use of algorithms in social media news feeds.
- *Search, aggregated news and blogs* – eg. valuing, selecting, ranking and prioritising and their effect on the public information environment; blogs/topics as alternative news sources.
- *Fake news* – eg. its incidence, distribution, role in influencing public opinion, structural factors underpinning its rise locally vs internationally
- *Cross-platform investigative and public interest journalism alliances* eg. recent emergence of sustainable, important collaborations, source of funding/subsidy;

These trends are almost exclusively understood in relation to the UK, European and North American markets. To support informed domestic policy-making we need information about these trends in Australia and some Asian news markets which have the population, scale and highly innovative media cultures to make them ideal sites for studying the implications of new, disruptive news phenomena in our region.

Studying shifts in social news sharing, or the spread of fake news in China, Korea, Japan and Indonesia would be useful in understanding regional political transformations, and also to enable better Australian reporting of, and to, the Asian region. This focus acknowledges Australian public interest journalism not simply as a form of national cultural output, but also as a bridge to better understanding, trade and cooperation within the region.

### **Using data analytics to assess media diversity**

To carefully assess these and other digital news trends, Australian researchers would need to use tools appropriate to the capture, patterning and analysis of online news information. Our preliminary research on social media news-sharing indicates that computational analysis of big news content datasets promises to revitalise the study of media pluralism (Martin, 2016; Dwyer and Martin, 2017; Dwyer and Martin, 2018 in press). Our work joins other recent academic studies of multi-platform news content diversity, which have identified the challenges for regulation (Doyle, 2015; Van Hoboken, 2015; Ohlsson et al, 2016). Sjøvaag, for

example, has mapped levels of media diversity in the changing digital infrastructure of distribution, production and reception, and the impact of 'global superplayers' as the ground for future policy interventions (Sjovaag, 2016). Other market oriented researchers have begun to use news analytics to ask more nuanced questions such as 'how diverse is the news that people are consuming around the time of major breaking news events?' like the Paris attacks, the San Bernardino shootings or the presidential debates (Song, 2016). The intention there is to drill down into the data, to explore the relations between social and search traffic 'referrers' (e.g. Google, Facebook and Twitter) and to better understand the sources and content of news stories being consumed.

Providing government is willing to shoulder the small cost of licensing and analysing 'raw' social media sharing data, social media analytics could be used together with the European pluralism frameworks to calculate risks to pluralism in terms of:

1. Availability (or in MPM terms 'supply' or 'distribution'), based on which news providers are most or least shared;
2. Consumption (or in the MPM 'use'), based on where audiences are accessing news stories, including the reach of different platforms' offerings; their relative share of consumption, and the extent of user multi-sourcing across platforms; and
3. Impact or influence, based on its level of recirculation, social velocity, geographic spread, presence of commendations and comments.

One caveat to social media analytics-based study is gaining access to data that can present a comprehensive picture of the social and cultural diversity of pluralistic societies. In December 2016 social analytics company NewsWhip recorded IndiaTimes.com as the most shared site internationally on Facebook, part of a shift to illustrate greater diversity in the publishers who were achieving high share counts (NewsWhip, 2017).

Another issue is establishing what 'sufficient pluralism' might be. Here the definition put forward by Ofcom (2015) and endorsed by the UK House of Lords has practical merit. They suggest that future policy assessments for digital media pluralism need to be equipped to identify:

- The range of independent media voices
- The reach and share of those voices across demographics
- The absence of voices in key markets
- Consumers' active use from a range of independent news providers
- Any one news source having too high a share of consumption
- Conditions of relatively free entry into media markets

In terms of using analytics to assess ideas of 'sufficiency' or 'media performance', we make two key observations. First, media performance assessment of online news stories needs to correlate the kinds of most shared stories against our received assumptions about quality, voice and public interest or public affairs news. That is, any genre and topic assessment of most shared news stories should continue to have a relation to previous value assessments of news content. News stories that deal with politics, civics, economics and business, or that have significant social and material consequences for audiences, should be assumed to play an important part of such assessments.

Second, there is value in considering the diversity of online news sharing in terms of socio-demographic indicators of high profile social media accounts, or digital influencers, as these can assist us in investigating the relative representation of various ethnicities, the presence of minority, community and public service media, local and regional media in the sharing media system, and public participation in via comments. Alternatively, analytics could be used to examine the presence of diverse social media participation around an event of national significance, as MIT Lab is doing in its Electome analysis of Twitter participation during the 2016 US presidential elections.

With these points in mind, we are happy to discuss further the way in which a revised media diversity framework could be used to examine the forms, extent and range of quality,

local, public interest journalism in Australia and how it is impacted by digital media publishing trends. By understanding the journalism that we are producing and that which we lack, we are better placed to support that which we need and want.

Yours sincerely

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