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Pluralism In The Australian Print Media

This paper discusses the issue of pluralism in the Australian print media and analyses Australian newspaper ownership from 1986 to 2000. It does so for three reasons: to identify who owns what at the start of the 21st century; to gain a view on trends in newspaper ownership concentration; and to gauge newspaper circulation trends, particularly in regard to arguments that newspaper circulations face a 'long-term decline'. While evidence appears to discount this, the analysis concurs with the dominant academic viewpoint that the Australian print media industry is concentrated within a few owners and these owners have formed a powerful press oligopoly. It concludes that the Australian press oligopoly is maintained by the economic system that supports it, by economies of scale, by globalism, by the justification and maintenance of the oligopoly by newspaper owners themselves, and by political support for those owners at the highest level.

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This paper discusses some fundamental assumptions about pluralism in the Australian print media. Pluralism, the number of print media outlets available to the public, and known as structural diversity, can be considered as one of two elements of media diversity. The other is the variety of views presented by those outlets, known as content diversity. This paper presents an analysis of Australian newspaper ownership from 1986 to 2000, which shows a significant newspaper oligopoly exists. However, it discounts the argument that the buyout of newspaper titles in the 1980s by Rupert Murdoch's News Limited was the catalyst for concentrated print media in Australia, arguing this has been a progressive trend in Australian newspaper ownership since the early 1900s. It also discounts the argument that newspaper circulation is in decline, showing that national Saturday and Sunday newspaper circulation, as well as suburban newspaper circulation, has increased up to 6 per cent in the last six years. Reasons why the Australian print media oligopoly is maintained are also discussed.

Ownership concentration in media markets is a significant economic, social and cultural issue in Australia and many other countries, according to the Productivity Commission (2000: 303).

Print Media Oligopoly

A basic tenet of most literature about media pluralism is that a diverse number of news media outlets providing a diversity of views is essential to democracy. The literature also indicates, however, that the pluralist ideals of a "multiplicity of voices" (McQuail 1987: 152) and "a whole range of ideas being available equally to everyone" (Schiller 1986: 19) have been supplanted in Australia by a press that is run consistently along market-based lines, with proprietors advocating minimal public intervention and maximum market freedom. Garnham (1986: 39) claims that "impressive evidence" exists to show "market forces produce results, in terms of oligopoly control... that are far from the liberal ideal of a free marketplace of ideas". The bulk of literature on the Australian media suggests the owners of Australian newspapers have formed such an oligopoly.

Bellas, Downing, Downing and Taylor (1985: 208) define an oligopoly as "a market situation in which a few large firms, usually between three and eight, dominate a market", and these conditions are fulfilled within the Australian print media. Since 1987, for example, the following newspapers have ceased publication: *The Times on Sunday*, *The Sunday Herald*, *the Sydney Sun*, *Sydney's Daily Mirror*, *the Brisbane Telegraph*, *Brisbane's Sunday Sun* and *Daily Sun*, *Perth's Daily News*, *the Adelaide News* and *the Business Daily* – all owned by Murdoch and closed through "rationalisation" (Henningham 1993: 66); the privately run *Sunday Observer*; and Holmes à Court's *Western Mail* (Henningham 1993: 66; Macphee 1990: 36; Chadwick 1992a: 45).

Henningham (1993) says the early 1990s witnessed "the worst period of newspaper closures ever experienced in Australia" (p.66) with only Sydney and Melbourne left with competing daily newspapers (Chadwick 1992a: 45). In 2000, just four newspaper owners dominated the nation's national and capital city daily newspaper market (two prominently – News Limited and John Fairfax Holdings); six owners dominated the regional daily newspaper market; four owners controlled the Saturday and Sunday newspaper markets; and four owners controlled more than 75 per cent of the suburban newspaper market (Communications Law Centre 2000: 22-24). These figures are not discrete, however, as single owners in most cases owned newspapers in all markets.

For example, in 2000 News Limited had a 67.8 per cent share of national and capital city daily newspaper circulation, a 23.4 per cent share of regional daily newspaper circulation, a 59.8 per cent share of Saturday newspaper circulation, a 76.1 per cent share of Sunday newspaper circulation, and a 46.6 per cent share of suburban newspaper circulation (Communications Law Centre 2000: 22-24).

For this analysis I have tabulated data on newspaper owners'

share of total circulation in specific categories for the six years from 1995 through to 2000. All data have been sourced from selected issues of the Communications Law Centre's journal *Communications Update* from 1995 to 2000 (1995: 20-24; 1996: 18-22; 1997: 22-26; 1998: 24-27; 1999: 22-24; 2000: 22-24) and appear in Tables 1 through 5. (Note: If readers add the percentage shares quoted, they will notice that in some cases they do not total exactly 100 per cent. As circulation figures, often in millions, are quoted are to within one unit, it is to be assumed that the disparity occurs because the original authors rounded percentage shares up and down as they were calculated.)

Newspaper ownership data

On a national and capital city level, Murdoch's 67.2 per cent circulation share of a 2,426,470 circulation in 1995 rose to a slightly higher 67.8 per cent of a 2,399,158 circulation by 2000. In 1995 Canadian Conrad Black (who then controlled John Fairfax Holdings) had 21.2 per cent of this circulation. Black subsequently relinquished his controlling share of the group, leaving John Fairfax Holdings (Fairfax) without a proprietor (Collins 1999: 43), although the group's share of this circulation jumped slightly to 21.4 per cent by 2000, after peaking at 21.6 per cent in 1996.

In the regional daily newspaper market of 1995, Irishman Tony O'Reilly's Australian Provincial News and Media (APN) controlled 31.3 per cent of a 646,166 circulation. By 2000 this had decreased to a 29.9 per cent share of a 620,040 circulation. News Limited controlled 21.8 per cent of this circulation in 1995, moving up to a 23.4 per cent share in 2000. Fairfax controlled 14.8 per cent of this circulation in 1995, jumping to 15.4 per cent by 2000.

Circulation data suggest more readers use weekend newspapers than weekday editions – the combined Saturday and Sunday newspaper circulation totalling more than the circulation figure of any other newspaper category. Saturday newspapers in this analysis are taken from capital city and national dailies and do not take into account Saturday editions of regional newspapers. The newspapers (with their owners in brackets) are *The Sydney Morning Herald* (Fairfax) and *The Daily Telegraph* (News Limited) in New South Wales; *The Herald Sun* (News Limited) and *The Age* (Fairfax) in Victoria; *The Courier-Mail* (News Limited) in Queensland; *The Advertiser* (News Limited) in South Australia; *The West Australian* (West Australian Newspaper Holdings) in Western Australia; *The Mercury* (News Limited) in Tasmania; *The Northern Territory News* (News Limited) in the Northern Territory; and *The Canberra Times* (Rural Press / JB Fairfax) in the Australian

Table 1: Owner Share of Australian National and Capital City Daily Newspaper Circulation

Year	1995	1996	1997	1998	1999	2000
Total circulation	2,426,470	2,390,677	2,422,279	2,425,513	2,423,251	2,399,158
News Ltd	67.2%	67.4%	66.9%	66.0%	67.6%	67.8%
Fairfax	21.2%	21.0%	21.6%	22.0%	21.5%	21.4%
WANH	9.8%	9.8%	9.7%	10.0%	9.2%	9.1%
Stokes	1.8%	1.7%	1.7%	2%		
Rural Press/ JB Fairfax					1.7%	1.7%

Table 2: Owner Share of Australian Regional Daily Newspaper Circulation

Year	1995	1996	1997	1998	1999	2000
Total circulation	646,166	640,565	634,516	626,794	620,040	621,182
APN	31.3%	30.8%	30.9%	30.7%	30.0%	29.9%
News Ltd	21.8%	22.2%	22.2%	22.8%	23.3%	23.4%
Fairfax	14.8%	15.2%	14.7%	14.8%	14.9%	15.4%
JB Fairfax	12.5%	15.5%	15.6%	14.9%		
Rural Press/ JB Fairfax					14.9%	14.9%
Harris Family	4.0%	3.9%	4.0%	4.0%	4.0%	3.9%
John Armati	3.3%					
WANH	1.2%	1.3%	1.2%	1.2%	1.2%	1.1%
Others	11.1%	11.0%	11.2%	11.6%	11.7%	11.4%

Table 3: Owner Share of Australian Saturday Newspaper Circulation

Year	1995	1996	1997	1998	1999	2000
Total circulation	3,054,917	3,034,776	3,075,246	3,186,145	3,192,997	3,171,735
News Ltd	60.9%	61.3%	60.7%	58.9%	59.5%	59.8%
Fairfax	22.4%	23.9%	24.5%	26.6%	26.1%	25.7%
WANH	12.4%	12.5%	12.5%	12.2%	12.1%	12.2%
Rural Press/JB Fairfax					2.2%	2.2%
Stokes	2.2%	2.3%	2.3%	2.2%		

Table 4: Owner Share of Australian Sunday Newspaper Circulation

Year	1995	1996	1997	1998	1999	2000
Total circulation	3,278,382	3,295,262	3,362,703	3,425,307	3,478,301	3,450,460
News Ltd	75.7%	76.2%	76.4%	75.7%	75.6%	76.1%
Fairfax	23.1%	22.5%	22.5%	23.1%	23.3%	22.8%
Rural Press/JB Fairfax				1.2%	1.1%	1.1%
Stokes	1.1%	1.2%	1.2%			
WANH						1.1%

Table 4: Owner Share of Australian Suburban Newspaper Circulation

Year	1995	1996	1997	1998	1999	2000
Total circulation	6,027,849	6,205,789	6,296,921	6,787,802	6,959,823	6,432,665
News Ltd	47.8%	48.8%	47.9%	47.9%	46.2%	46.6%
Fairfax	16.2%	16.4%	15.4%	15.4%	14.3%	18.1%
United Media/WANH	8.3%	8.3%	8.9%	8.9%	8.8%	9.0%
APN	2.3%	3.6%	3.7%	3.7%	3.9%	2.9%
Boyle Family	4.0%	4.0%	3.6%	3.6%	3.5%	
Hannan/JB Fairfax	2.7%	2.7%	n/a	2.6%	3.5%	
Text Media				2.4%	3.0%	
Ind News	1.7%	1.7%	1.5%	1.5%	2.5%	2.5%
Harris Family	1.0%	1.0%	1.0%	1.0%		
Rural Press/JB Fairfax	0.5%	0.5%	0.5%	0.5%		

Capital Territory. National newspapers, *The Weekend Australian* (News Limited) and the *Weekend Financial Review* (Fairfax), which was first published in September 1997, are also included.

Sunday newspapers in this analysis are *The Sun Herald* (Fairfax) and *The Sunday Telegraph* (News Limited) in New South Wales; *The Sunday Herald-Sun* (News Limited) and *The Sunday Age* (Fairfax) in Victoria; *The Sunday Mail* (News Limited) in Queensland; *The Sunday Mail* (News Limited) in South Australia; *The Sunday Times* (News Limited) in Western Australia; *The Sunday Tasmanian* (News Limited) in Tasmania; *The Sunday Territorian* (News Limited) in the Northern Territory; and *The Canberra Times* (Rural Press/JB Fairfax) in the Australian Capital Territory. Australia supports no national Sunday newspapers (for this analysis weekend editions of national newspapers are counted as Saturday newspapers).

In 1995's suburban newspaper market News Limited controlled 47.8 per cent of a 6,027,849 circulation. This figure was down slightly by 2000, being 46.6 per cent of a 6,432,665 circulation. In 1995 Fairfax controlled 16.2 per cent of suburban newspaper circulation, dropping to 14.3 per cent in 1999, but rising

to above the 1995 figure in 2000, obtaining 18.1 per cent.

Interpretation of Newspaper newspaper Ownership ownership Datadata

It can be seen from these data that News Limited is the most significant newspaper owner in Australia, that company's dominance of circulation bettered only in the suburban newspaper market. Through News Limited, Rupert Murdoch owns six of Australia's ten daily capital city newspapers. They are *The Daily Telegraph* in Sydney, *The Herald-Sun* in Melbourne, *The Courier-Mail* in Brisbane, *The Advertiser* in Adelaide, *The Mercury* in Hobart and *The NT News* in Darwin. Murdoch currently holds newspaper monopolies in Brisbane, Adelaide, Hobart and Darwin. It can also be seen that, following the shake-out of the nation's print media from the mid-1980s to early 1990s, when 12 newspapers closed or merged with other titles and 1200 journalists positions went with them (see Rodgers 1994 and Chadwick 1994), the ownership structure of the nation's press has not changed significantly in the six years from 1995 to 2000 inclusive, save from ownership changes to *The Canberra Times* in the national market, one merger and one sell out in the lower end of the regional daily market, and a handful of sell outs and new titles established at the lower end of the suburban newspaper market. Importantly, in the national and capital city daily and in the Saturday and Sunday newspaper markets there are no independent newspaper publishers. In the regional daily newspaper market independent owners controlled 11.2 per cent of circulation in 2000. Independent owners controlled 8.1 per cent of suburban newspaper circulation in 2000.

Some literature points to the concentration of the Australian press beginning with the buyout of newspaper titles by News Limited in the 1980s. Henderson (1989: 199-207) suggested that 'Murdochphobia' had become endemic in Australia at that time because of this. However, I would argue that the Australian newspaper landscape, save for the early 1900s (see Barr (2000) below), has not been served by anything other than an oligopoly of newspaper owners. The data I have garnered for this analysis cover the period from 1995 to 2000, but in that time newspaper ownership in Australia has been relatively constant. Indeed, Branigan (1998: 54) argues media ownership in Australia appears to have been "remarkably stable" for the past 40 years. It would be of value to obtain a snapshot of newspaper ownership prior to the News Limited buyout of the 1980s and, fortunately, the Communications Law Centre provided this in the February 1998 (p.28) issue of its journal *Communications Update*. The journal

notes that in December 1986 there were but three owners of Australia's national and capital city newspapers: the Herald and Weekly Times group (HWT), which controlled 48 per cent of circulation; News Limited, which controlled 28 per cent; and Fairfax, which controlled 24 per cent. Figure 1 illustrates how the makeup of the national print media landscape looked in 1986.

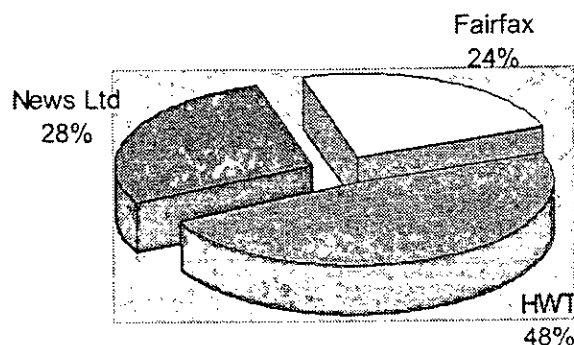
Barr (2000: 2) argues that a pattern of concentrated newspaper ownership in Australia began as early as the 1940s when "around 40 per cent of all newspapers sold" were "published by the Herald group". Indeed, Barr (2000: 2-3) cites a measurable progression towards ownership concentration since the early 1900s, saying:

There has been an increasing tendency towards press oligopoly in Australia. In 1903 the 21 capital city daily newspapers were owned by seventeen independent owners; in 1960 the fourteen daily newspapers had seven owners; and by 1999, two groups owned ten of the twelve dailies in Australia... The bulk of ownership of Australian daily newspapers now resides with only two companies, News Corporation and Fairfax Ltd, with only the *West Australian* and *Canberra Times* remaining under separate ownership... Australia's pattern of media ownership and control has this long been essentially one of power residing in the hands of a few well-established corporations, with highly interlinking patterns of ownership and interests.

Figure 2 indicates how the national print media landscape looked in 2000.

It is important to consider, in terms of structural diversity, that 1986 provided the public with a greater number of titles, albeit produced by one fewer owners. In that year 19 national and capital city newspapers were published: HWT published eight; News Limited published six and Fairfax published five. By 1998 this had decreased to 12 titles: News Limited published seven; Fairfax

Australian national and capital city newspaper ownership in 1986

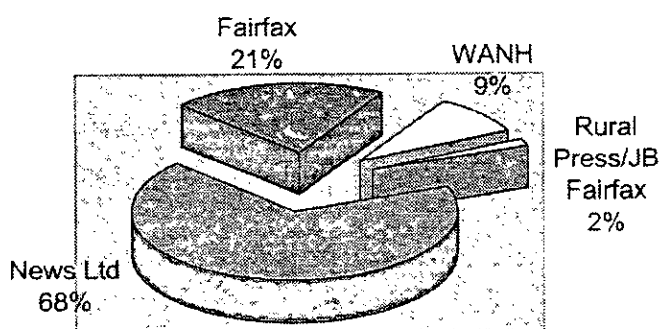


published three and West Australian Newspaper Holdings (WANH) and Kerry Stokes published one each (Communications Law Centre 1998: 28). Nothing has changed in 2000, save for Stokes' selling The Canberra Times to Rural Press/JB Fairfax.

One should also consider the titles controlled by 'Others' in this analysis. Independent control of circulation in suburban newspapers, particularly, is significant, as high as 15.2 per cent in 1995. Similarly, independent control of circulation in regional daily newspapers ranged from 11.1 per cent in 1995, up to 11.5 per cent in 2000. This point was reinforced by major newspaper owners to both the Print Media Inquiry of 1991-1992 and the Productivity Commission's Inquiry into broadcasting/Broadcasting in 1999-2000. The Productivity Commission accepted the view of these owners, saying in its conclusions that: "Although the Australian media industry is widely perceived as highly concentrated, it actually consists of a large number of companies" (Productivity Commission 2000: 82). However, the Commission added the important corollary that "relatively few firms have a substantial presence" (Productivity Commission 2000: 82).

This analysis also provides data that refute arguments that newspaper circulation is in decline. Morris (1996: 10), for example,

Australian national and capital city newspaper ownership in 2000



argues that Australia's newspaper industry "is facing the cumulative effects of a continuing decline in the per capita circulation, a decline in actual circulation figures for its weekday editions...an ageing readership, and an increase in newsprint prices". Table 6 shows circulation patterns for all newspaper categories 1995 through to 2000.

These circulation data (again taken from issues of the

Communications Law Centre's Communications Update) show that:

- Sunday newspapers have had a net increase of 172,078, or 5.25 per cent
- Saturday newspapers have had a net increase of 116,818, or 3.82 per cent
- suburban newspapers have had a net increase of 395,816, or 6.71 per cent
- regional daily newspapers have had a net decline of 24,984, or 3.87 per cent, and
- national and capital city newspapers have had a net decline of 27,312, or 1.12 per cent.

Hippocrates (1999: 74) attributes growing weekend newspaper circulation to changing lifestyles, saying "growth in circulation movement in newspapers in Australia seems to be at the weekend with Saturday and Sunday circulations continuing to rise as people's reading habits change to reflect new media usage patterns and lifestyle choices." Granted, this analysis does not show newspaper circulation trends over a period longer than six years. Circulation data over a longer period, say 30 years (which I have not been able to obtain), would allow a more conclusive test of Branigan's (1998: 55) assertion that since the 1970s newspapers had begun "their long circulation decline". The analysis does, however, suggest claims like those of Hargreaves (1999: 51), who said: "Whether or not the end of history is at hand, it is now incontestable that newspapers are in long-term decline", are somewhat premature.

How is Australia's newspaper oligopoly maintained?

Literature suggests five main reasons:

- the economic system
- economies of scale
- globalism
- the justification and maintenance of the oligopoly by newspaper owners, and
- political support for those owners at the highest level.

Siebert, Peterson and Schramm (1956: 1) argued that the press takes on "the form and coloration of the social and political structure within which it operates", and in a market economy the press tends to conform to the economic processes that underpin

that economy. Bellas et al. (1985: 27), for example, said "constant competition" among firms in a market economy would lead "to the elimination of less efficient firms". The remaining firms would then merge to gain advantages from economies of scale (Bellas et al. 1985: 27). For the press these economies include reductions in costs through shared correspondents, shared wire services, shared transport and bulk newsprint (Windschuttle 1988: 93). The Print Media Inquiry found press ownership in Australia "appeared to be driven by economic forces", primarily economies of scale, "which inexorably favour monopoly newspapers in a particular market and group ownership of newspapers in different markets" (Chadwick 1992b: 1). Armstrong (1992: 4) contended that economies of scale were "natural economies" that pushed the media toward ownership concentration and, thus, strengthened the oligopoly. Brown (1991: 119) argued that economies of scale contributed "to the tendency towards the common ownership of newspaper titles in different markets (and) across markets".

These markets have now become global in scale. Hughes (1997: 78) said the communications industry, generally, was "clearly in globalism", defining the term as "a shift in control of national economies...from national governments to multinational corporations". Hughes (1997: 79) described the Australian press, which he said exhibited "concentrated ownership and a decreasing number of hands", as a "classic example" of globalism. Citing News Limited, which is "now controlled from Murdoch's New York headquarters", Hughes (1997: 79-80) said globalism led to media ownership becoming more concentrated within "webs of cross-ownership, making it easier for major players to increase in size and scope... leading to further market power". Morris (1996: 15) said a crucial factor about the dynamics of newspaper economics was that, unlike other mass media, newspaper advertising was regarded by many readers as "information". He said that, rather than circulation increases coming purely from editorial, additional advertising would build readership, setting in motion "an upward spiral" that dominant newspapers used to "force out weaker competitors and eventually become monopolies" (Morris 1996: 15-16). Market proponents justify the benefits of increased market size and globalism by claiming the benefits of economies of scale accrue to readers, who can buy cheaper and "more comprehensive" newspapers; advertisers, who gain from lower advertising rates; shareholders, who receive higher profits; and the editorial staff of newspapers, who gain better pay and conditions (Officer 1991: 1541-1542).

Finally, when those in political office need the support of the market-based press, it is more than likely that they will themselves support that press, and, therefore, the press oligopoly. In 1988, for

example, United States President Ronald Reagan described a move by the US Congress to force a-just-turned-American-citizen Rupert Murdoch to divest either his US television or US newspaper holdings as "a blow to free speech" (Communications Law Centre 1988: 32). (Formerly an Australian, Rupert Murdoch became a United States citizen on 4 September 1985, the suggestion being that US citizenship opened the way for greater US media ownership (Tuccille 1989: 138).) In an Australian context, Murdoch is claimed to have cancelled a proposed meeting in New York with Australian Prime Minister John Howard when he learned Howard wanted to discuss Australian media ownership laws (Romei 2002: 2). Former Treasurer in the Whitlam Labor Government, Dr Jim Cairns, claimed it was "not possible for a government in Australia to be elected, or remain in office, if opposed by the media complex" (1975, quoted in Tiffen 1989: 1). Cairns (1975, quoted in Tiffen 1989: 1) said, "in this sense, it's the media that now determines who governs Australia". Overall, a failure to enact any real changes following a number of inquiries on media pluralism and ownership since 1980 seems to indicate that Australian governments are very wary about legislation that would dilute Australia's print media oligopoly.

Conclusion

This paper has discussed newspaper ownership as a factor of pluralism in the Australian print media. Through an analysis of Australian newspaper ownership from 1986 to 2000 it has shown that the Australian print media industry is concentrated within a few powerful owners and that these owners have formed a powerful press oligopoly. Literature suggests concentrated print media ownership in Australia has been a progressive trend since the early 1900s. The paper further presents data that shows newspaper circulation in Australia is not presently in decline, with national Saturday and Sunday newspapers and suburban newspapers all registering increases in circulation of between 3 and 6 per cent. Finally, the paper argues that Australia's press oligopoly is maintained by the economic system that supports it, by economies of scale, by globalism, by justification and maintenance of the oligopoly by newspaper owners themselves and by political support, at the highest level, for those owners.

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