

Media Concentration: Australia



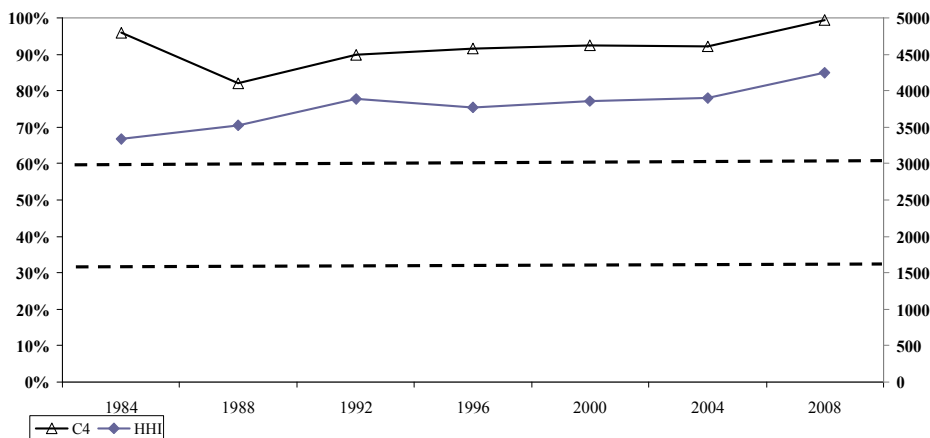
Australia: Overview

- **Traditional media: highly concentrated - 1-3 dominant players**
- Newspapers (total daily & Sunday circulation)
 - News Ltd = 58% approx; Fairfax = 29% approx.
- Magazines (circulation: PBL = 44%; Pacific = 27%)
- Commercial TV (3 Networks – 77% ads)
- Commercial Radio (4 groups - 55% ads)
- Telecoms (Telstra 64% total/41% wireless)
- Pay TV [Foxtel 63.1% (96): Austar, Optus resell]
 - Owners: Telstra 50%, News Ltd 25%, PBL 25%
- ISP: Bigpond/Telstra (44%)

Australian Newspapers' Ownership Shares

(% Circulation)								
Company	1984	1988	1992	1996	2000	2004	2008	
News Ltd (Murdoch)	25.0	56.2	58.1	56.6	57.2	57.7	57.8	
Fairfax	23.7	18.9	20.2	21.5	22.0	21.4	28.6	
Herald and Weekly Times	46.4	--	--	--	--	--	--	
WA	--	--	8.3	8.6	8.1	7.8	7.7	
APN	0.8	4.5	5.5	5.5	5.2	5.3	5.3	
Rural	1.5	1.9	2.2	2.7	3.9	5.3	--	
Other	2.7	18.5	5.6	5.1	3.5	2.4	0.6	

AUSTRALIA: Newspapers (1984-2008)

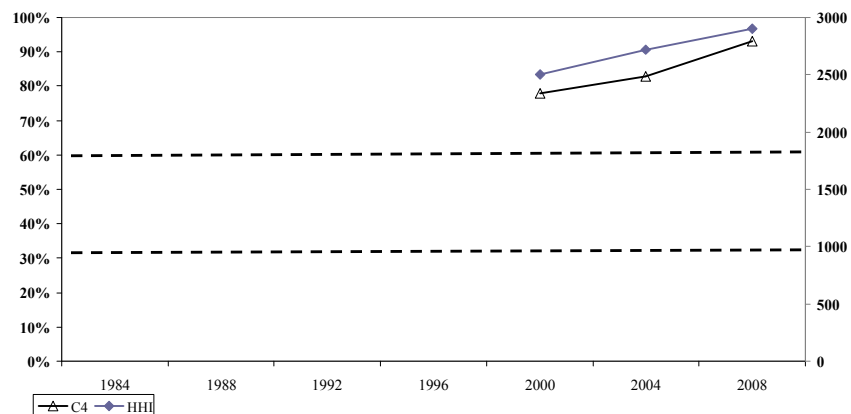


Australian Magazines' Ownership Shares 2000-2008

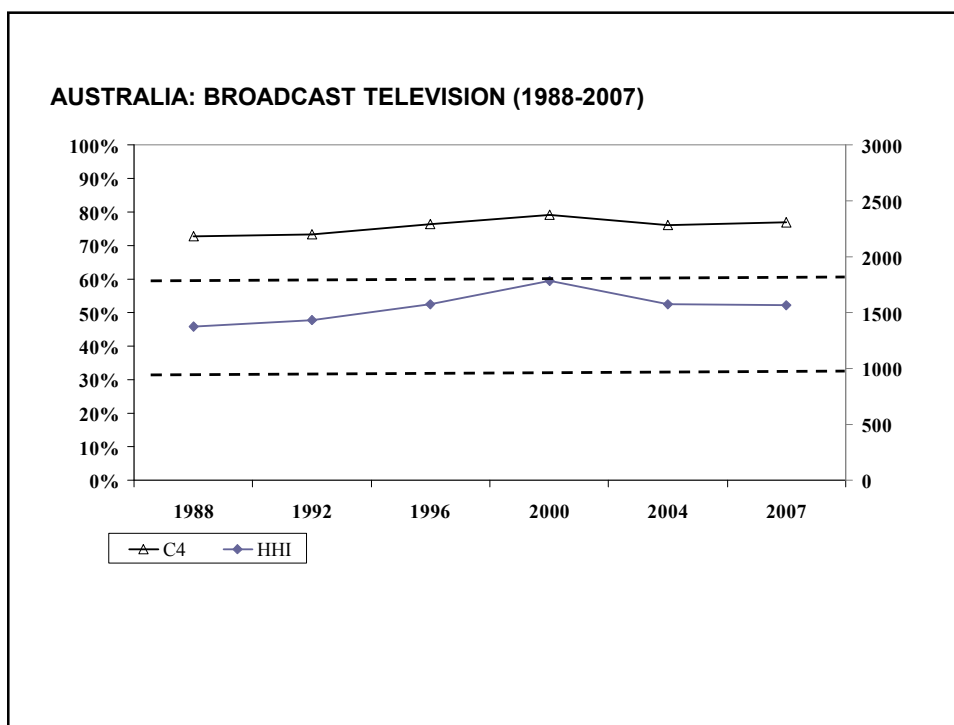
% of circulation (top 50 magazine titles in each year) for each company

Owners	2000	2004	2008
PBL (ACP)	46	46	44
Pacific	19	22	27
Murdoch/News	5	1	14
FPC	7	11	..
Readers Digest	6	4	6
Horwitz	3	2	..
Time	5	4	1
Other	8	9	7

AUSTRALIA: Magazines (2000-2008)

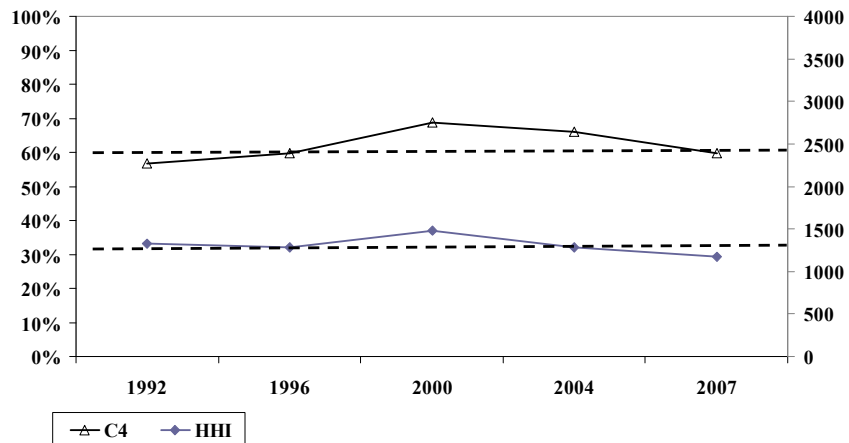


AUSTRALIA: BROADCAST TELEVISION (1988-2007)						
	(All data relates to fiscal year ending 30 June)					
	1988	1992	1996	2000	2004	2007
	Share of Total Revenue (%)					
COMMERCIAL TV						
Seven Network	17.0	21.2	22.8	26.2	22.1	24.9
Nine Network	23.6	24.4	25.7	27.9	25.8	21.5
Ten Network	17.6	11.5	15.4	13.6	17.9	18.2
Other Commercial TV	24.7	24.4	20.4	17.8	20.5	20.0
PUBLIC TV						
ABC	14.6	16.1	12.5	11.6	10.2	12.4
SBS	2.5	2.5	3.1	3.0	3.5	3.0
Total Revenue (\$A million)	1,592.9	2,282.0	2,913.8	3,828.7	4,316.7	4,689.9
C4	72.9	73.2	76.5	79.2	76.0	77.0
HHI	1372	1435	1579	1780	1578	1566
Noam Index	380	398	422	514	476	472



AUSTRALIA: BROADCAST RADIO (1992-2007)					
	Share of Total Revenue (%)				
	1992	1996	2000	2004	2007
Commercial Radio					
Austereo	7.9	21.5	16.1	15.8	21.5
Hoyts Media	9.9				
Australian Radio Network	5.2	10.0	13.1	11.8	10.4
DMG			6.9	13.8	8.8
Tricom (in 1992)/Southern Cross	1.4	2.5	3.9	6.5	7.5
Radio Superhighway/Macquarie Network		1.4	2.8	3.6	3.1
Broadcast Operations			3.4	3.0	3.0
Other Commercial Radio	34.0	29.8	14.7	10.6	34.0
National Radio					
Australian Broadcasting Corporation	33.2	29.1	27.3	24.4	23.7
Special Broadcasting Service	3.0	2.7	2.7	2.9	2.4
Total Australia (\$A Million)	690.2	813.8	1053.6	1172	1391.1
C4	56.5	59.8	68.8	66.1	59.7
HHI	1330.7	1277.0	1482.4	1284.0	1174.8
Noam Index	503.0	425.7	494.1	387.2	354.2

AUSTRALIA: BROADCAST RADIO (1992-2007)

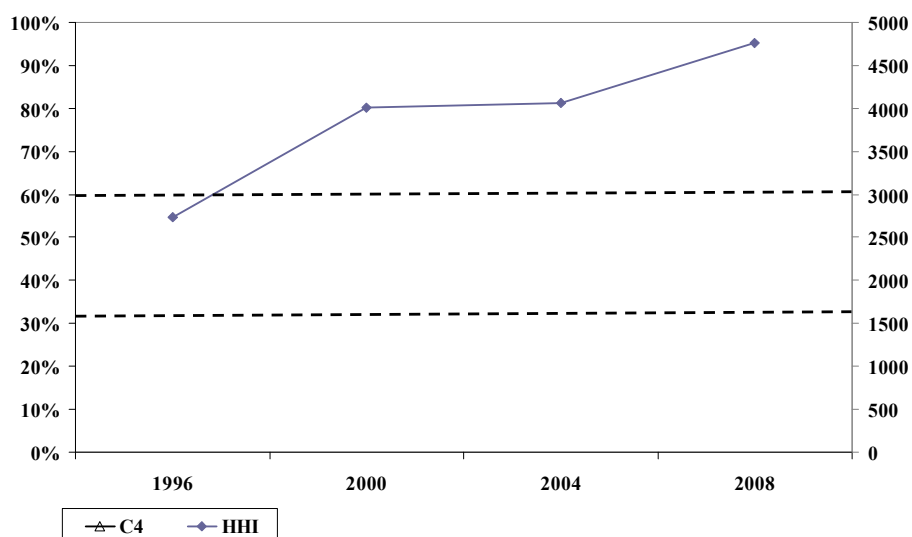


AUSTRALIA: PAY TELEVISION (1996-2008)

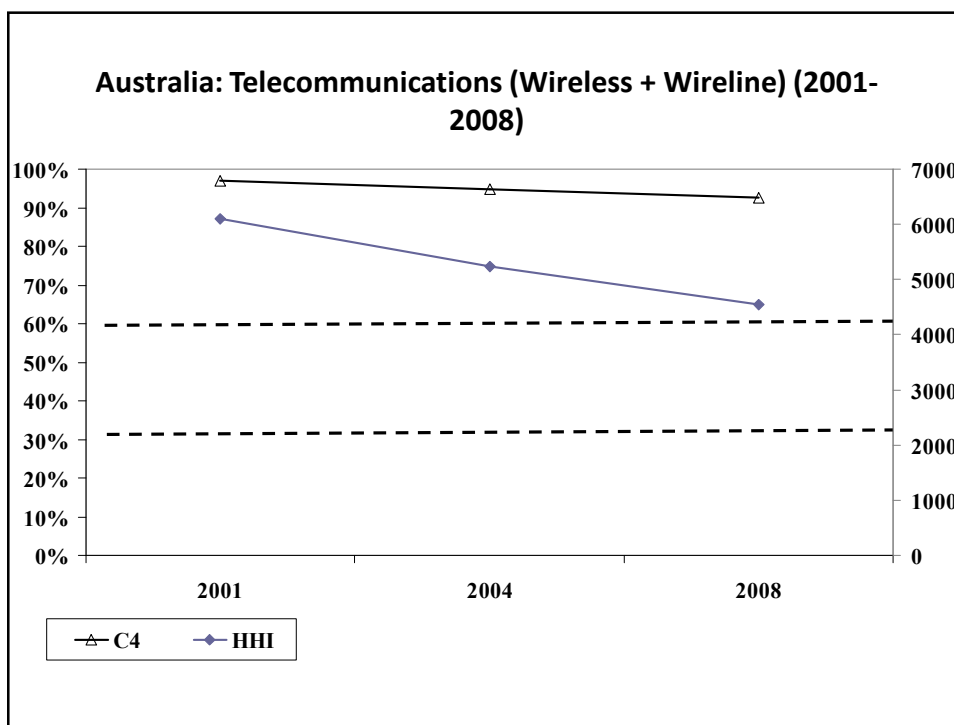
	1996	2000	2004	2008
Share of Total Revenue (%)				
Australis Media	14.0			
Foxtel	30.7	54.4	56.6	63.1
Austar	19.5	27.9	26.7	27.2
Optus (Foxtel reseller post-2002)	34.9	16.4	12.1	6.2
Other	0.9	1.3	4.5	3.5
Total Revenue (\$A million)	215	1,007	1,453	2,252
C4	99	99	100	100
HHI*	2735.5	4008.6	4068.0	4755.5
Noam Index*	1116.8	1792.7	1819.3	2126.7

NOTE: * Based on top 3 firms for 2000 and subsequent years.

AUSTRALIA: PAY TELEVISION (1996-2008)

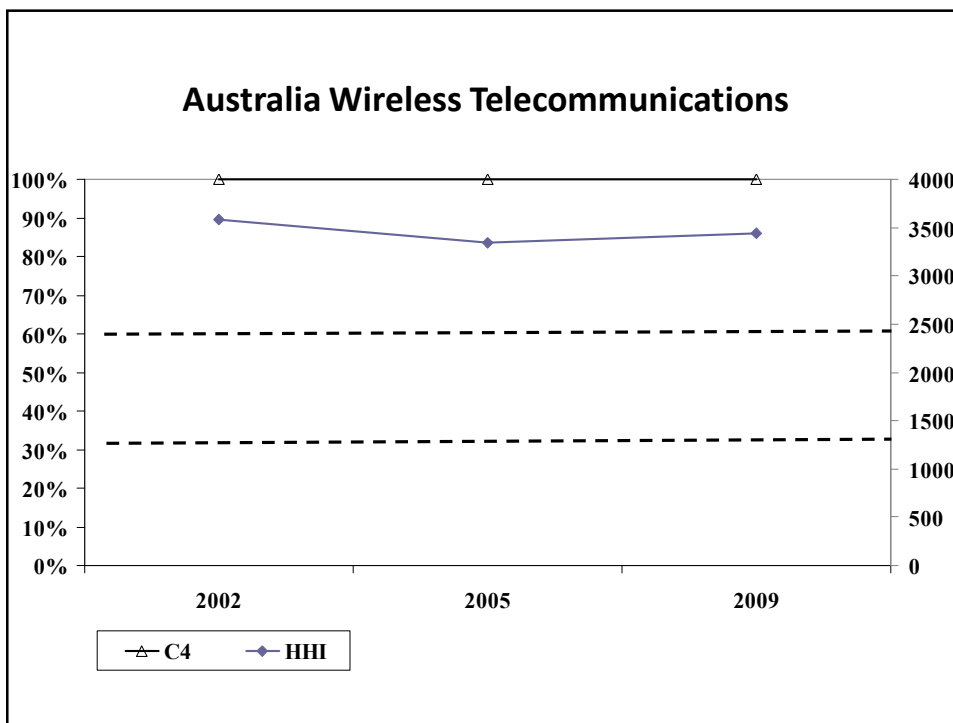


Australia: Telecommunications (Wireless + Wireline) (2001-2008)			
<i>Carriers</i>	2001	2004	2008
	Share of Total Revenue (%)		
Telstra	76.6	68.9	64.2
Optus	14.3	17.9	19.5
Vodafone	4.3	5.2	6.2
Hutchinson	0.6	0.8	2.8
AAPT	1.7	2.7	1.5
Others	2.5	4.6	5.8
Total Revenue (\$A Billion)	21.3	23.7	26.8
C4	96.9	94.7	92.7
HHI	6093.8	5239.2	4550.7
Noam Index	2725.2	2343.0	2035.1



Australia: Telecommunications Wireless Supplementary Table

Carriers	2002	2005	2009
	Subscribers %		
Telstra	44.5	44.0	41.0
Optus	36.0	33.0	33.0
Vodafone	17.5	17.0	26.0
Hutchinson	2.0	5.5	JV -Vodafone
Australia	100.0	99.9	100.0
Total subscribers (Million)	13.1	18.5	24.2
C4	100.0	100.0	(C3) 100.0
HHI	3586.5	3344.3	3446.0
Noam	1793.3	1672.1	1989.5



AUSTRALIA: INTERNET SERVICE PROVIDERS (2000-2008)

ISP	2000		2004		2008	
	subscribers ('000)	share (%)	subscribers ('000)	share (%)	subscribers ('000)	share (%)
Bigpond	600	15.8	1900	33.3	3500	43.8
Optus	170	4.5	750	13.2	880	11.0
iiNet	20	0.5	190	3.3	560	7.0
OzEmail	450	11.8	500	8.8	iiNet (2005)	
iPrimus	150	3.9	450	7.9	440	5.5
TPG/SP Telemedia	130	3.4	280	4.9	400	5.0
Chariot	50	1.3	80	1.4	TPG	
Other	2200	57.9	1550	27.2	2220	27.8
Total subscribers	3800	100.0	5700	100.0	8000	100.0
ISPs with >100,000 subscribers (no.)	8		10		10	
ISPs >100,000 subscribers (share of total)	69%		75%		75%	
ISPs with >10,000 subscribers (no.)	36		36		37	
INDICES						
C4	36.1		63.2		67.3	
HHI	438.9		1460.7		2139.3	
Noam Index	73.1		243.5		351.7	

Note: No of voices for Noam Index defined as ISPs with more than 10,000 subscribers. The total number of ISPs over the period was of the order of 600 to more than 700 with many being very small.

Australia Internet Service Providers

