

Reuters Institute Digital News Report 2022



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Nic Newman with Richard Fletcher, Craig T. Robertson, Kirsten Eddy, and Rasmus Kleis Nielsen

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Foreword

Prof. Rasmus Kleis Nielsen
Director, Reuters Institute for the Study of Journalism (RISJ)

We live in an age of extremes, also when it comes to some aspects of news and media use. Climate change, the ongoing Coronavirus pandemic, and the Putin regime's invasion of Ukraine are all examples of hugely consequential challenges that journalists, at their best, help us all understand and respond to. And a growing number of news media willing to embrace digital technologies and able to offer distinct journalism in an incredibly competitive marketplace for attention are doing well by doing good.

But most news media continue to struggle in an unforgiving winner-takes-most online environment, where the bulk of audience attention and advertising spending goes to digital platforms, and where many new voices – ranging from creators and influencers to activists and politicians – are carving out their own place, competing head-on with journalists for attention.

And at a more basic level, while many of the most commercially successful news media primarily serve audiences that are, crudely put, like me – affluent, highly educated, privileged, in many countries predominantly male, middle-aged, and white – our findings this year document that the connection between journalism and much of the public is fraying.

Despite the huge difference independent professional journalism can make in helping people understand the world beyond personal experience, we find declining interest in the news, lower trust – after a positive bump last year – as well as a growth in active news avoidance amongst some groups. Large numbers of people see the media as subject to undue political influence, and only a small minority believe most news organisations put what's best for society ahead of their own commercial interest.

For younger people, these issues are compounded by differences in how new generations use media – looking specifically at the news habits of those under 30, we find much less interest in connecting directly with news media, different views on what journalism ought to look like, and a much heavier reliance on social media platforms.

There is not one uniform way in which these developments are playing out across the world, but both trends – a weakening of the connection between journalism and much of the public, and younger people using media in ways that challenge inherited approaches to the business and practice of journalism – are present in almost every one of the countries covered here in the eleventh edition of our *Digital News Report*.

We find that news and media use is in many cases not as politically polarised as is often assumed. But we also document real social inequalities in how people engage with news, and who it is most lucrative for most media organisations to serve.

The 46 markets we analyse account for more than half the world's population, and can perhaps illuminate trends elsewhere. Our focus is on countries which are either broadly democratic or generally compare themselves to countries with a democratic tradition. Because we use online polling, we also continue to focus on countries with high internet penetration, though we remain committed over time to extending our work to more countries in the Global South – in line with the international mission of the Reuters Institute.

The increasing number and diversity of markets covered – including 11 in Asia, five in South America, three in Africa and North America, as well as 24 in Europe – have led us to compare fewer data points across the whole sample and to focus on meaningful comparisons across markets that are broadly similar. We've provided more detail about differences in polling samples in both the methodology pages and the relevant country pages.

This report continues to benefit from a strong network of partners and sponsors around the world. We are proud to have the opportunity to work with a number of leading academics, as well as media experts from the news industry. Our partners have helped in a variety of different ways, checking questionnaires, helping with interpretation, and in many cases publishing their own reports.

Given the richness of the research, this report can only convey a small part of the data and analysis. More detail is available on our website <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2022> which contains slide packs and charts, along with a licence that encourages reuse, subject to attribution.

Making all this possible, we are hugely grateful to our sponsors: the Google News Initiative, BBC News, Ofcom, the Broadcasting Authority of Ireland, the Dutch Media Authority (CvdM), the Media Industry Research Foundation of Finland, the Fritt Ord Foundation in Norway, the Korea Press Foundation, and Edelman UK, as well as our academic sponsors at the Leibniz Institute for Media Research/Hans Bredow Institute, Hamburg, the University of Navarra, the University of Canberra, the Centre d'études sur les médias, Quebec, Canada, and Roskilde University in Denmark. Google's commitment to a three-year extension of their support for the report (covering the period 2021–3) and continued support from the Open Society Foundations has been key to help ensure we can continue to cover more countries in the Global South. We are delighted that the Fundación Gabo continues to support the translation of the report into Spanish, opening our insights to an even wider community in Latin America and beyond, and that the Japanese public broadcaster NHK and Reuters News Agency have joined the network of sponsors this year.

Methodology

This study has been commissioned by the Reuters Institute for the Study of Journalism to understand how news is being consumed in a range of countries. Research was conducted by YouGov using an online questionnaire at the end of January/beginning of February 2022.

- Samples were assembled using nationally representative quotas for age, gender, and region in every market. Education quotas were also applied in all markets except Bulgaria, Croatia, Greece, India, Indonesia, Kenya, Malaysia, Mexico, Nigeria, Philippines, Romania, South Africa, Thailand, and Turkey. In Australia, Canada, Denmark, Finland, France, Germany, Italy, Poland, Spain, Sweden, Norway, the United States, and United Kingdom we also applied political quotas based on vote choice in the most recent national election. The data in all markets were weighted to targets based on census/industry accepted data.
- Data from India, Kenya, Nigeria, and South Africa are representative of younger English speakers and not the national population because it is not possible to reach other groups in a representative way using an online survey. The survey was fielded mostly in English in these markets,¹ and restricted to ages 18–50 in Kenya and Nigeria. Findings should not be taken to be nationally representative in these countries.
- More generally, online samples will tend to under-represent the news consumption habits of people who are older and less affluent, meaning online use is typically over-represented and traditional offline use under-represented. In this sense, it is better to think of results as representative of the *online* population. In markets in Northern and Western Europe, where internet penetration is typically over 95%, the differences between the online population and national population will be small, but in South Africa (58%) and India (54%), where internet penetration is lower, the differences between the online population and the national population will be large.
- These differences mean we need to be cautious when comparing results between markets, especially on issues where we know that the sample would potentially make a significant difference (e.g. paying for news or podcasts).
- It is also important to note that online surveys rely on recall, which is often imperfect or subject to biases. We have tried to mitigate these risks through careful questionnaire design and testing.² Some of our survey-based results will not match industry data, which are often based on different methodologies such as web-tracking.
- In April we conducted an additional survey to understand the impact of the war in Ukraine on media consumption in five countries (UK, US, Germany, Poland, and Brazil). Samples were around 1,000 in each case. We have indicated occasions where data come from this additional survey next to the appropriate chart.
- In some cases, we have drawn on data from other industry sources and have signalled this in the text or as a footnote. We have also used selected quotes from focus groups and interviews conducted in three countries (USA, UK, and Brazil) in February and March 2022. On occasion we have also used quotes from open questions from our main survey, clearly indicating this in each case.
- YouGov work with a select handful of other panel providers in some markets. From time to time YouGov replace or combine providers to improve data quality. These providers include AIT, Borderless Access, Dynata, Netquest, and Toluna. A fuller description of the methodology, panel partners, and a discussion of non-probability sampling techniques can be found on our website along with the full questionnaire <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2022>

Market	Sample size	Population	Internet penetration	Market	Sample size	Population	Internet penetration	Market	Sample size	Population	Internet penetration
Europe				Poland	2,009	38.0m	78%	Asia Pacific			
UK	2,410	67.0m	95%	Portugal	2,011	10.3m	78%	Australia	2,038	25.8m	84%
Austria	2,004	9.0m	88%	Romania	2,001	19.5m	74%	Hong Kong	2,010	7.6m	89%
Belgium	2,044	11.6m	94%	Slovakia	2,007	5.5m	85%	India	2,035	1,393.4m	54%
Bulgaria	2,003	7.0m	67%	Spain	2,028	46.4m	93%	Indonesia	2,068	276.4m	77%
Croatia	2,001	4.1m	92%	Sweden	2,064	10.1m	96%	Japan	2,015	125.6m	95%
Czech Republic	2,009	10.6m	88%	Switzerland	2,004	8.6m	94%	Malaysia	2,004	32.8m	89%
Denmark	2,059	5.8m	98%	Turkey	2,007	83.0m	83%	Philippines	2,023	111.0m	82%
Finland	2,064	5.6m	94%	Americas				Singapore	2,017	5.9m	88%
France	2,059	65.5m	92%	USA	2,036	331m	90%	South Korea	2,026	51.3m	96%
Germany	2,002	82.4m	96%	Argentina	2,012	45.6m	91%	Taiwan	2,115	23.9m	92%
Greece	2,004	11.1m	73%	Brazil	2,022	213.9m	75%	Thailand	2,036	70.0m	84%
Hungary	2,013	9.7m	89%	Canada	2,012	37.7m	94%	Africa			
Ireland	2,016	4.8m	92%	Chile	2,011	19.2m	92%	Kenya	2,032	55.0m	85%
Italy	2,004	59.2m	93%	Colombia	2,027	51.2m	75%	Nigeria	2,017	211.4m	73%
Netherlands	2,003	17.1m	96%	Mexico	2,005	132.3m	67%	South Africa	2,008	60.0m	58%
Norway	2,010	5.4m	98%	Peru	2,027	33.4m	82%				

Source: Internet World Stats (<http://www.internetworldstats.com>).

¹ Respondents in India could choose to complete the survey in Hindi and respondents in Kenya could choose Swahili, but in both cases the vast majority selected an English survey.

² From 2012 to 2020 we filtered out respondents who said that they had not consumed any news in the past month. From 2021 onwards we included this group, which generally has lower interest in news. In previous years this group averaged around 2–3% of the starting sample in each market, meaning that the decision to include it has not affected comparative results in any significant way. Some figures have been affected by one or two points in the UK, USA, and Australia, and we have taken this into account when interpreting changes involving these years.

Authorship and Research Acknowledgements



Nic Newman is Senior Research Associate at the Reuters Institute for the Study of Journalism and is also a consultant on digital media, working actively with news companies on product, audience, and business strategies for digital transition. He writes an annual report for the Institute on future media and technology trends.



Dr Richard Fletcher is a Senior Research Fellow at the Reuters Institute for the Study of Journalism and leads the research team. He is primarily interested in global trends in digital news consumption, the use of social media by journalists and news organisations, and more broadly the relationship between computer-based technologies and journalism.



Dr Craig T. Robertson is a Postdoctoral Research Fellow at the Reuters Institute for the Study of Journalism whose interests include news trust and credibility, fact-checking and verification, and how both partisan attitudes and epistemic beliefs factor into these domains.



Dr Kirsten Eddy is a Postdoctoral Research Fellow in Digital News at the Reuters Institute for the Study of Journalism. She studies the interplay of journalism, politics, and digital media, with a focus on moral and civic media and political discourse.



Prof. Rasmus Kleis Nielsen is Director of the Reuters Institute for the Study of Journalism, Professor of Political Communication at the University of Oxford, and served as Editor-in-Chief of the *International Journal of Press/Politics* from 2015 to 2018. His work focuses on changes in the news media, political communication, and the role of digital technologies in both.

Market-level commentary and additional insight around media developments have been provided by academic partners and by our network of Reuters Journalist Fellows around the world. RISJ Senior Research Associate Dr David A. L. Levy did invaluable work editing and further developing many of the country profiles in this year's report as did Giles Wilson. Additional expert analysis and interpretation of the survey data were provided by the team at YouGov, in particular, Charlotte Clifford, Josh Taylor, David Eastbury, and Mark Pellatt.



1



SECTION 1

Executive Summary and Key Findings

Nic Newman
Senior Research Associate
Reuters Institute for the Study of Journalism



Last year's report contained some positive signs for the news industry, with higher consumption and rising trust amidst a second wave of Coronavirus lockdowns. Many traditional news brands seemed to benefit not just from greater attention, but also financially, with more people taking out online subscriptions and advertisers looking to associate themselves with reliable content.

A year on, we find a slightly less optimistic picture. While a break-out group of primarily upmarket news publishers across the world report record digital subscription numbers and growing revenues, more broadly, we find that interest in news and overall news consumption has declined considerably in many countries while trust has fallen back almost everywhere – though it mostly remains higher than before the Coronavirus crisis began. We're also seeing news fatigue setting in – not just around COVID-19 but around politics and a range of other subjects – with the number of people actively avoiding news increasing markedly.

Since our main data set was collected in early February, a new threat to global security has emerged in the form of Russia's invasion of Ukraine. This event clearly increased news consumption across all news sources, but a second Digital News Report survey in five countries undertaken in early April saw further levels of selective avoidance, even in countries like Poland and Germany that have been directly impacted by the conflict. We devote a special chapter to the impact of the Ukraine crisis and attitudes towards media coverage.

A clear throughline in this year's report is the changing habits of younger groups, specifically those under 30, whom news organisations often struggle to reach. Throughout this Executive Summary, and in a separate chapter, we find that this group that has grown up with social media is not just different but *more different* than they were in the past. We also explore their use of newer visual networks for news such as TikTok and Instagram, with support from a detailed qualitative study in three countries (UK, US, and Brazil).

More widely, this year's data confirm how the various shocks of the last few years, including the Coronavirus pandemic, have further accelerated structural shifts towards a more digital, mobile, and platform-dominated media environment, with further implications for the business models and formats of journalism.

In our country and market pages, which combine industry developments with key local data points, we see how different media companies are coping with these various headwinds. We find a mixed picture of downsizing and layoffs in some places, but optimism around business models, industry cooperation, and format innovation in others. And everywhere we find growing concerns about a looming cost-of-living crisis that could be making people rethink how much they can afford to spend on news media.

This eleventh edition of our *Digital News Report*, based on data from six continents and 46 markets, aims to cast light on the key issues that face the industry. Our more global sample, which since 2021 has included India, Indonesia, Thailand, Nigeria, Colombia, and Peru, provides some understanding of how differently the news environment operates outside the United States and Europe. The overall story is captured in this Executive Summary, followed by Section 2, with chapters containing additional analysis, and then individual country and market pages in Section 3 with extra data and context.

A SUMMARY OF SOME OF THE MOST IMPORTANT FINDINGS FROM OUR 2022 RESEARCH.

- Trust in the news has fallen in almost half the countries in our survey, and risen in just seven, partly reversing the gains made at the height of the Coronavirus pandemic. On average, around four in ten of our total sample (42%) say they trust most news most of the time. Finland remains the country with the highest levels of overall trust (69%), while news trust in the USA has fallen by a further three percentage points and remains the lowest (26%) in our survey.
- Consumption of traditional media, such as TV and print, declined further in the last year in almost all markets (pre-Ukraine invasion), with online and social consumption not making up the gap. While the majority remain very engaged, others are turning away from the news media and in some cases disconnecting from news altogether. Interest in news has fallen sharply across markets, from 63% in 2017 to 51% in 2022.
- Meanwhile, the proportion of news consumers who say they avoid news, often or sometimes, has increased sharply across countries. This type of *selective avoidance* has doubled in both Brazil (54%) and the UK (46%) over the last five years, with many respondents saying news has a negative effect on their mood. A significant proportion of younger and less educated people say they avoid news because it can be hard to follow or understand – suggesting that the news media could do much more to simplify language and better explain or contextualise complex stories.
- In the five countries we surveyed *after* the war in Ukraine had begun, we find that television news is relied on most heavily – with countries closest to the fighting, such as Germany and Poland, seeing the biggest increases in consumption. Selective news avoidance has, if anything, increased further – likely due to the difficult and depressing nature of the coverage.
- Global concerns about false and misleading information remain stable this year, ranging from 72% in Kenya and Nigeria to just 32% in Germany and 31% in Austria. People say they have seen more false information about Coronavirus than about politics in most countries, but the situation is reversed in Turkey, Kenya, and the Philippines, amongst others.
- Despite increases in the proportion paying for online news in a small number of richer countries (Australia, Germany, and Sweden), there are signs that overall growth may be levelling off. Across a basket of 20 countries where payment is widespread, 17% paid for any online news – the same figure as last year. Persuading younger people to pay remains a critical issue for industry, with the average age of a digital news subscriber almost 50.
- A large proportion of digital subscriptions go to just a few big national brands – reinforcing the *winner takes most* dynamics that we have reported in the past. But in the United States and Australia we are now seeing the majority of those paying taking out *more than one* subscription. This reflects the increased supply of differentiated paid news products in areas such as political opinion, local news, and a range of specific niches – holding out hope that more people will ultimately pay for multiple titles.

- But in the face of rapidly rising household bills, we find some respondents rethink the number of media subscriptions they can afford this year – which include news, television, music, and books. While most say they expect to retain the same number of media subscriptions, others say they expect to take out *fewer*, as they look to save money on non-essential items.
- With first-party data collection becoming more important for publishers with the imminent demise of third-party cookies, we find that most consumers are still reluctant to register their email address with news sites. Across our entire sample, only around a third (32%) say they trust news websites to use their personal data responsibly – comparable to online retailers such as Amazon – and the figure is even lower in the United States (18%) and France (19%).
- Access to news continues to become more distributed. Across all markets, less than a quarter (23%) prefer to start their news journeys with a website or app, down nine points since 2018. Those aged 18–24 have an even weaker connection with websites and apps, preferring to access news via side-door routes such as social media, search, and mobile aggregators.
- Facebook remains the most-used social network for news but users are more likely to say they see *too much news* in their feed compared with other networks. While older groups remain loyal to the platform, we show how the youngest generation has switched much of its attention to more visual networks over the last three years.
- TikTok has become the fastest growing network in this year's survey, reaching 40% of 18–24s, with 15% using the platform for news. Usage is much higher in parts of Latin America, Asia, and Africa than it is in the United States or Northern Europe. Telegram has also grown significantly in some markets, providing a flexible alternative to Meta-owned WhatsApp.
- While social media have increased the profile of many digital journalists, we find that the most well-known journalists are still TV anchors and presenters in most countries. When asked to name journalists they pay attention to, few people can name foreign correspondents, while newspaper columnists have higher name recognition in the UK and Finland than in Brazil, the United States, or France.
- The smartphone has become the dominant way in which most people *first* access news in the morning, though we find different patterns across countries. In Norway, Spain, Finland, and the UK, the smartphone is now accessed first ahead of television, while radio retains an important role in Ireland. Morning newspaper reading is still surprisingly popular in the Netherlands; television still dominates in Japan.
- After last year's slowdown in part caused by restrictions on movement during the COVID-19 pandemic, growth in podcasts seems to have resumed, with 34% consuming one or more podcasts in the last month. Our data show Spotify continuing to gain ground over Apple and Google podcasts in a number of countries and YouTube also benefiting from the popularity of video-led and hybrid podcasts.

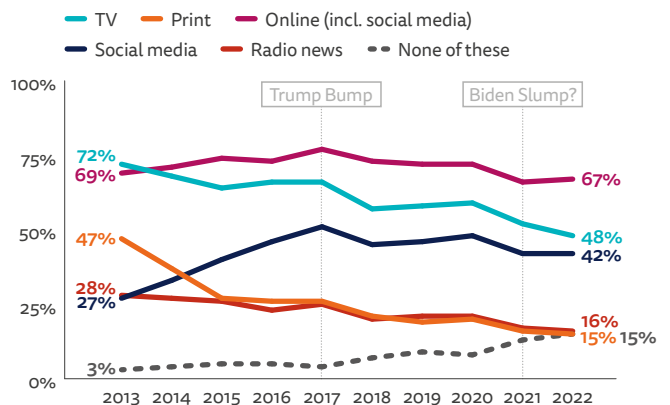
CONSUMPTION PATTERNS REVEAL DISCONNECTION AND DISENGAGEMENT WITH NEWS – AMONGST SOME NEWS CONSUMERS

While a succession of crises including the pandemic and the invasion of Ukraine demonstrates the importance of independent professional journalism, and significant growth for some individual media brands, we find that many people are becoming increasingly disconnected from news – with falling interest in many countries, a rise in selective news avoidance, and low trust further underlining the critical challenge news media face today: connecting with people who have access to an unprecedented amount of content online and convincing them that paying attention to *news* is worth their while.

We now have solid data spanning ten years that enable us to see consistent and relentless falls across countries in the reach of traditional channels such as print, radio, and television news. At the same time, we find that online reach is flat or, at best, increasing slightly – but certainly not making up the gap. Digital and social media offer a much wider range of stories, but this environment can often be overwhelming and confusing. While many people remain extremely active and engaged with online news, the abundance of choice in an online context may be leading others to engage far less regularly than they did in the past.

In the chart below, which shows weekly access in the United States between 2013 and 2022, we have added an extra line for those who say they accessed *none of the listed options* in the week they completed our survey. This has grown from 3% in 2013 to 15% in 2022.

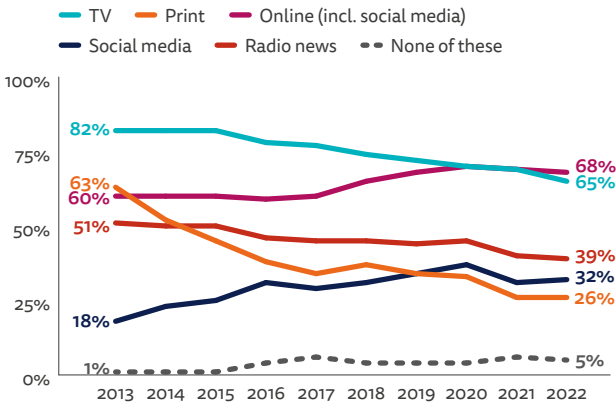
PROPORTION THAT USED EACH SOURCE OF NEWS IN THE LAST WEEK (2013–22) – USA



Q3. Which, if any, of the following have you used in the last week as a source of news?
 Base: Total 2013–22 samples (n = 2000). Note: No data for 2014 due to a scripting error in the survey. The figure for no news would have been 12% without a methodology change where we previously excluded those who said they consumed no news in last month.

While the United States seems to have the largest group of disconnected news users, we see similarly high figures in Japan (15%) the United Kingdom (9%), France (8%), and Australia (8%). Even Germany, a country with often very traditional media habits, is not immune. Since 2013, weekly print consumption has fallen from 63% to 26% and TV news usage from 82% to 65%. Although online and social media have grown a little, overtaking television for the first time, we also find growing numbers who seem to be disconnecting from news altogether – this proportion reaching 5% in 2022.

PROPORTION THAT USED EACH SOURCE OF NEWS IN THE LAST WEEK (2013–22) – GERMANY



Q3. Which, if any, of the following have you used in the last week as a source of news? Base: Total 2013–22 samples (most n ≈ 2000). Note: No data for 2014 due to a scripting error in the survey. The figure for no news would have been 4% without a methodology change where we previously excluded those who said they consumed no news in last month.

It is important to note that high levels of disconnection are not evident everywhere. The proportion consuming none of our listed news sources weekly is limited in Portugal (2%) and Finland (2%) and extremely rare in South Africa (1%), Nigeria (<1%), and Kenya (<1%), even though we also see growing pressure on traditional sources of news such as print and television news in these countries.

Falling interest in the news

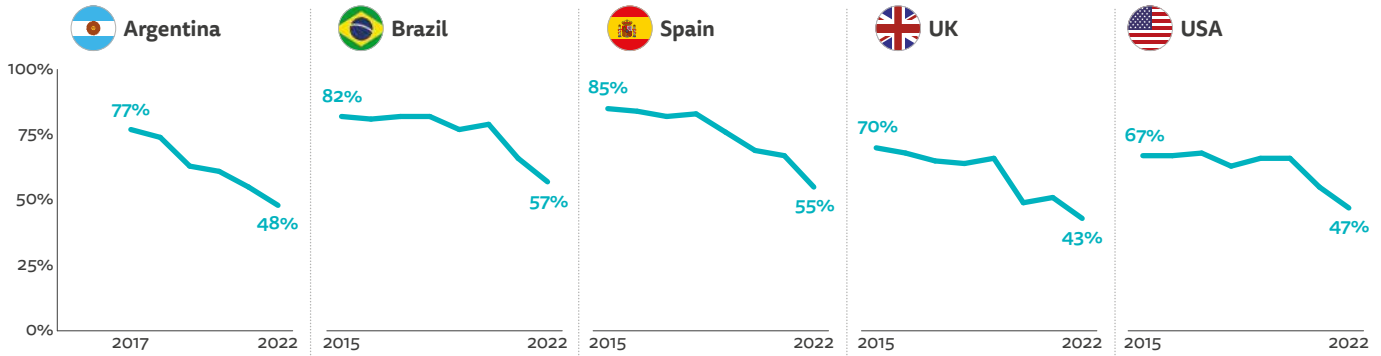
Disconnection is just one sign of the difficulties of engaging some audiences in a more digital environment. At the same time we find that the proportion that says they are very or extremely interested in news has fallen sharply over time across markets – a trend that has accelerated despite the continuing COVID-19 pandemic. This year we find news interest lower in the vast majority of countries in our survey. In some countries, such as Argentina, Brazil, Spain, and the United Kingdom, these falls have been going on for some time, while in the United States we see a slightly different pattern. Interest remained high during the Trump years but seems to have declined significantly since Joe Biden became president. Today, less than half of our sample (47%) say they are very or extremely interested in news compared with 67% in 2015.

Again, it is important to note that there are some countries that buck these trends or where declines are happening more slowly. These include richer Central/Western European nations where there has been less political or economic turmoil over the past few years.

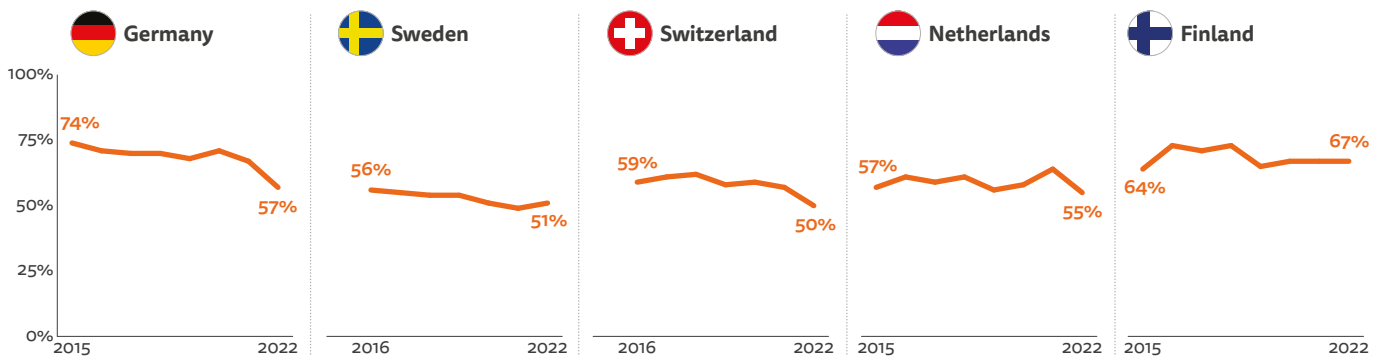
These data suggest two different but related problems. First, the emergence of a minority of people who are active online, many of them younger or less well educated, but who have become largely disconnected from the news, perhaps because they don't feel that it is relevant to their lives. And then, separately, we find a more generalised decline in news interest and consumption affecting a much bigger group, which may relate to structural changes in the way the news is distributed, such as the shift to online, the nature of the news cycle itself, or both.

PROPORTION WHO ARE VERY OR EXTREMELY INTERESTED IN NEWS (2015–22)

Selected countries with largest falls



Selected countries with more stable levels

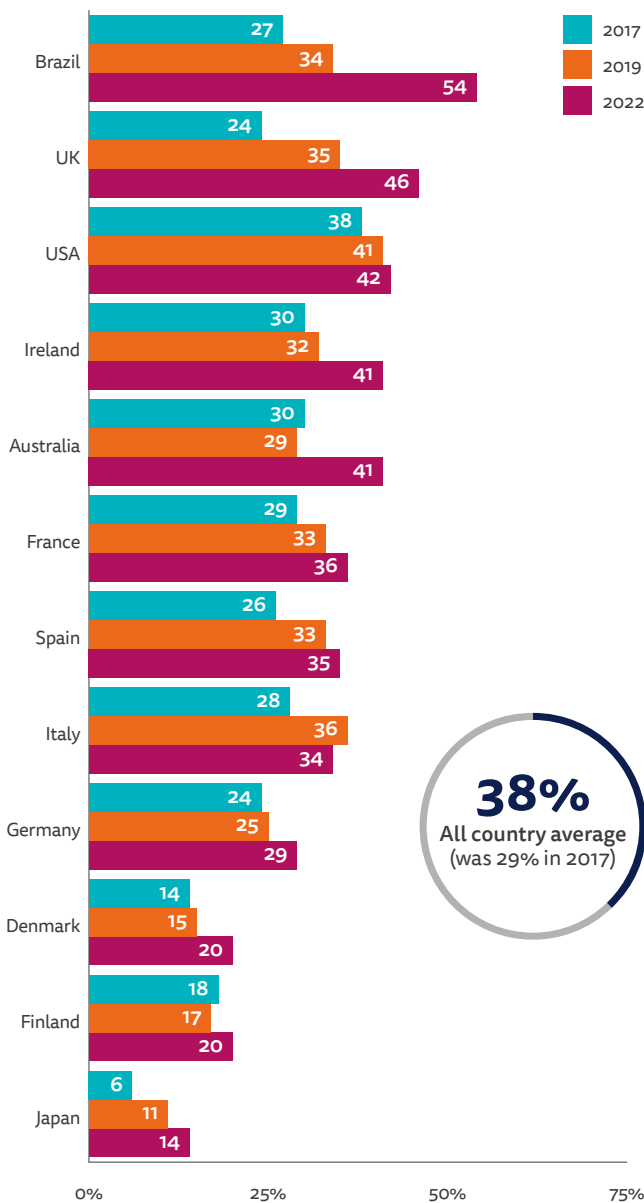


Q1c. How interested, if at all, would you say you are in news? Base: Total 2015–22 samples (n=2000).

Selective news avoidance and its implications

While the majority of people across countries remain engaged and use the news regularly, we find that many also increasingly choose to ration or limit their exposure to it – or at least to certain types of news. We call this behaviour *selective news avoidance* and the growth of this activity may help to explain why consumption levels have mostly not increased, despite the uncertain times in which we live. The proportion that says they avoid the news, sometimes or often, has doubled in Brazil (54%) and the UK (46%) since 2017 – and also increased in all other markets (see next chart). This type of selective avoidance seems to be less widespread in Northern European countries such as Germany (29%), Denmark, and Finland (20%), as well as in some Asian countries such as Japan (14%).

PROPORTION WHO SOMETIMES OR OFTEN ACTIVELY AVOID THE NEWS (2017-22) – SELECTED MARKETS



Q1di_2017. Do you find yourself actively trying to avoid news these days? Base: Total 2017–22 samples (n=2000).

Selective news avoiders give a variety of reasons for their behaviour. Across markets, many respondents say they are put off by the repetitiveness of the news agenda – especially around politics and COVID-19 (43%), or that they often feel worn out by the news (29%). A significant proportion say they avoid news because they think it can't be trusted (29%). Around a third (36%), particularly those who are under 35, say that the news brings down their mood. Others say the news leads to arguments they would rather avoid (17%), or leads to feelings of powerlessness (16%). A small proportion say they don't have enough time for news (14%) or that it is too hard to understand (8%).

MOST COMMON REASONS FOR NEWS AVOIDANCE - ALL MARKETS



43%

say there is too much politics and COVID-19



36%

say news has negative effect on mood



29%

say they are worn out by amount of news



29%

say the news is untrustworthy or biased



17%

say it leads to arguments I'd rather avoid



16%

say there is nothing I can do with the information

Q1di_2017ii. Why do you find yourself actively trying to avoid the news? Base: All who avoid the news often, sometimes, or occasionally. All markets = 64,120.

Concerns about the news having a negative effect on their mood are higher amongst avoiders in the United Kingdom (55%) and United States (49%) than they are elsewhere.

I actively avoid things that trigger my anxiety and things that can have a negative impact on my day. I will try to avoid reading news about things like deaths and disasters.

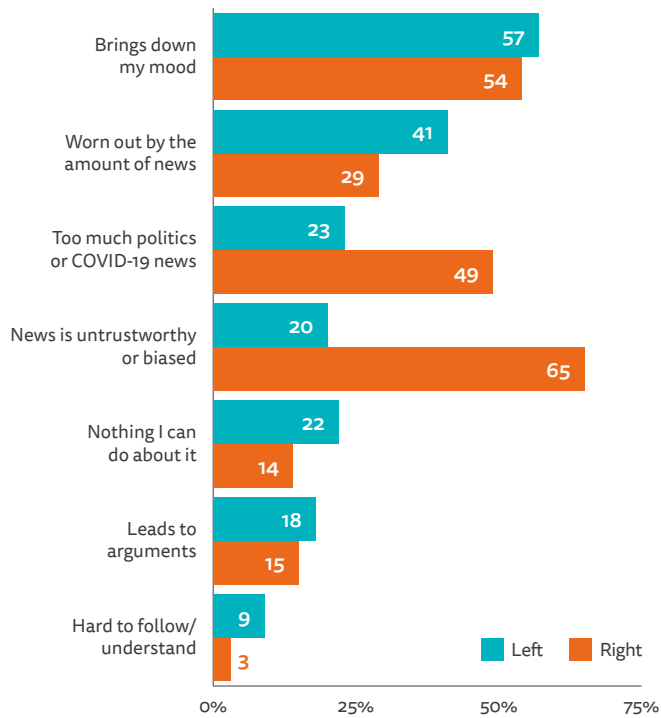
Male, 27, UK

Truthfully, I don't like to dwell too much on the mainstream news. I find sometimes it can be repetitive and negative.

Female, 19, UK

Political allegiances can also make a striking difference to why people choose to avoid news. In the United States, those who self-identify on the right are far more likely to avoid news because they think it is untrustworthy or biased, but those on the left are more likely to feel overwhelmed, carry feelings of powerlessness, or worry that the news might create arguments.

PROPORTION WHO AVOID NEWS FOR EACH REASON – BY POLITICAL LEANING – USA



Q1di_2017ii. Why do you find yourself actively trying to avoid the news? Base: All who avoid news often, sometimes, or occasionally in USA. Left=327, Right=336.

These findings will be particularly challenging for the news industry. Subjects that journalists consider most important, such as political crises, international conflicts, global pandemics, and climate catastrophes, seem to be precisely the ones that are turning some people away from news – especially amongst those who are younger or harder to reach.

Many news organisations are embracing approaches such as solutions journalism around subjects like climate change, that aim to give people a sense of hope or personal agency. Others are looking to find ways to widen the agenda to softer subjects or make news more relevant at a personal level, but there will be a limit to how far journalists can go – or should go – to make the news more palatable.

News is too hard for many people to work out

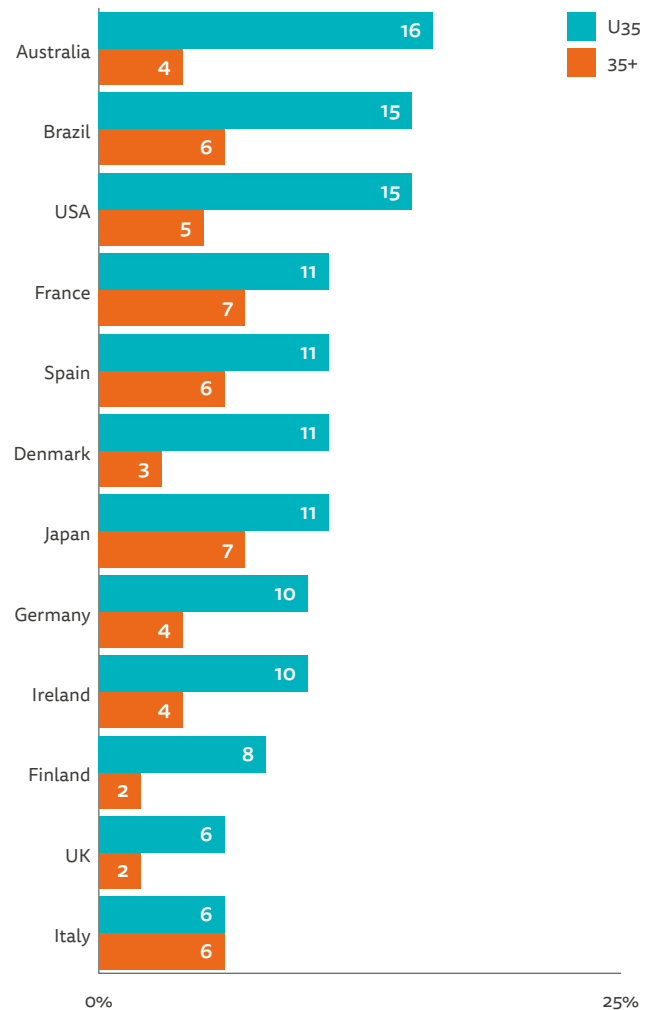
One other important data point relates to the difficulty that many younger audiences, and less educated groups, have in understanding journalism as currently practised. In countries such as Australia, the United States, and Brazil, around 15% of younger avoiders say they find news hard to follow – a much higher proportion than older news consumers.

I do sometimes finish reading articles maybe more stressed about a situation, or sometimes just confused.

Female, 24, UK

This could relate to the complexity of the language or assumed knowledge often contained in news reports. But the increase in news consumption via social media or word of mouth through friends and family, may also be playing a part. News is often accessed by young people in more fragmented ways, meaning that people sometimes miss key context that was previously carefully packaged into linear narratives by the mainstream media.

PROPORTION OF NEWS AVOIDERS WHO STRUGGLE TO UNDERSTAND THE NEWS – BY AGE – SELECTED MARKETS



Q1di_2017ii. Why do you find yourself actively trying to avoid the news? Base: Under 35/35s and over who avoid news: Australia = 428/963, Brazil = 559/1053, Denmark = 283/648, Finland = 260/705, France = 319/1075, Germany = 333/950, Ireland = 367/999, Italy = 279/1080, Japan = 235/825, Spain = 336/1035, UK = 386/1310, USA = 450/987.

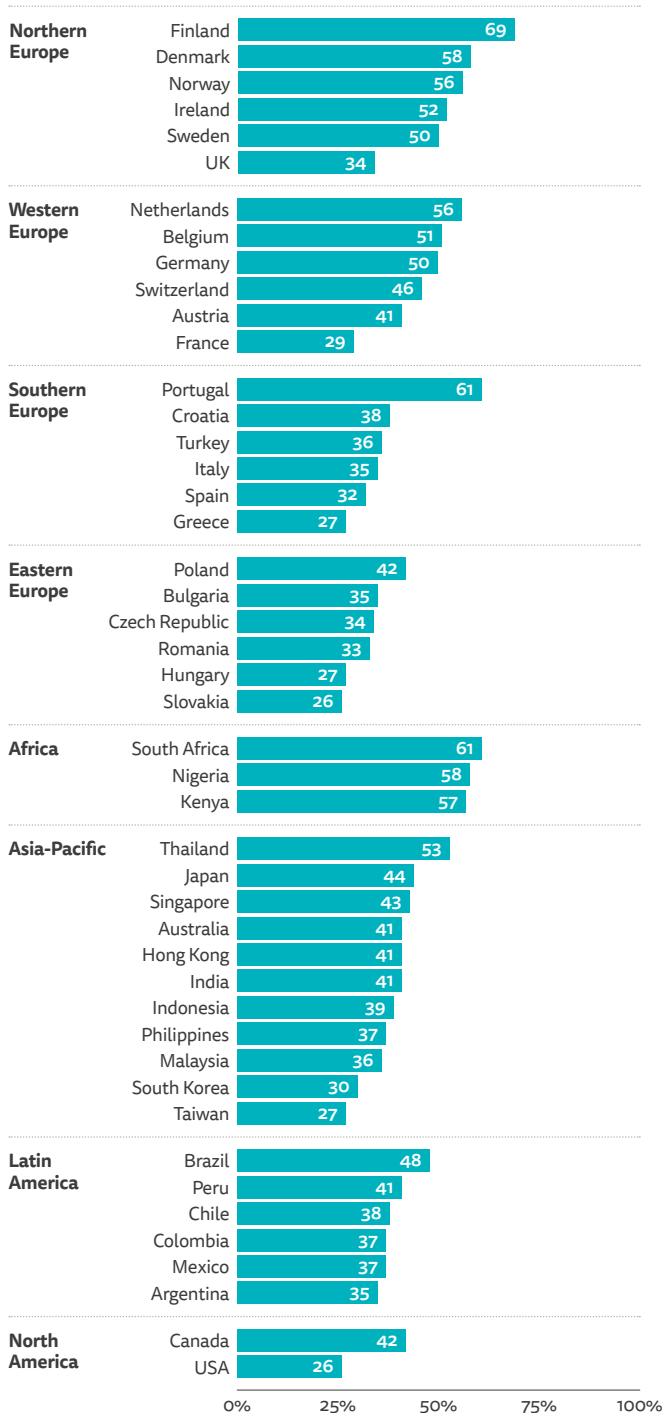
During the COVID-19 crisis (and now Ukraine) we saw many news organisations using explainer and Question & Answer formats to try to address these issues on websites and via social media to engage younger and less educated audiences. Our data suggest this process needs to go much further.

For further analysis see Section 2.3: The Changing News Habits and Attitudes of Younger Audiences

TRUST FALLS BACK AFTER COVID-19 BUMPS

This year we find lower levels of overall trust in 21 of our 46 markets, partly reversing the gains made at the height of the Coronavirus pandemic. Eighteen markets are at a similar level, with just seven on an upward path. The average level of trust (42%) is also a little lower than last year and trust in individual news brands is on a downward trend in most countries.

PROPORTION THAT TRUSTS MOST NEWS MOST OF THE TIME – ALL MARKETS



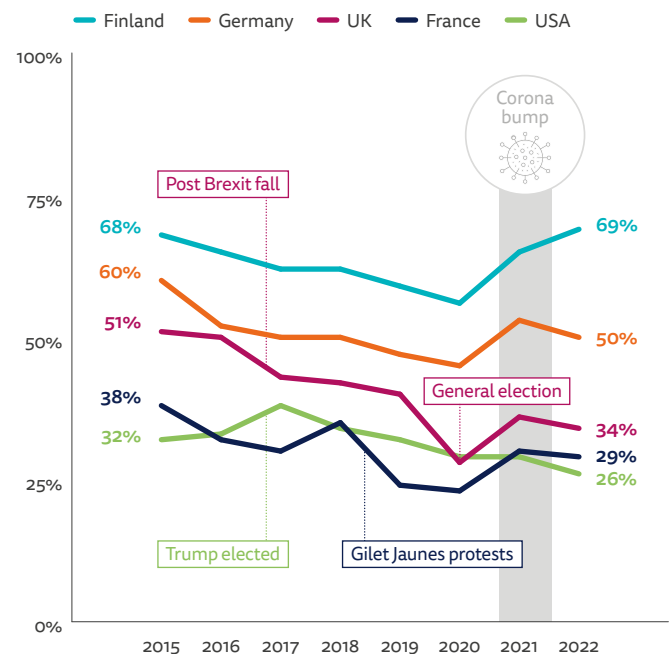
Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statements? – I think you can trust most news most of the time. Base: Total sample in each market (n = 2000).

Finland remains the country with the highest levels of overall trust (69%) – up four points on last year and 13 points on 2020. At the other end of the scale, news trust in the USA (26%) has fallen by a further three percentage points and remains the lowest level in our survey along with Slovakia (26%). Notable changes in Europe include falls in Romania (-9), Croatia (-7), Poland (-6), Switzerland (-5), Austria (-5), Greece (-5), Italy (-5), and Spain (-4). In Latin America, trust is down in Brazil (-6) and Colombia (-3), but level or slightly up elsewhere. It is a mixed picture in Africa, with a fall in Kenya (-4) but strong growth in South Africa (+9) and Nigeria (+4). Finally, in Asia, trust has risen in the Philippines (+5) and Japan (+2) but is down in Malaysia (-5) and Taiwan (-4).

In some regions we find a widening gap between markets with the highest levels of trust and those with the lowest. We also find that those markets with the most trust – such as Finland – also tend to have higher interest in news and lower levels of active news avoidance. By contrast, low trust countries, such as the United States, France, the United Kingdom, and Slovakia, see some of the highest levels of selective avoidance, as well as news disconnection, with declining interest in news.

It is important to put this year's trust changes in context. In most cases the headline trust level is still higher than it was before the Coronavirus pandemic reinforced the importance of reliable media for many people. On the other hand, the chart below also reminds us that, in many countries, trust had been on a downward trajectory for some time – partly driven by a series of polarising events like Brexit in the UK, the turmoil of the Trump years in the United States, and the Gilets Jaunes protests in France. In this context, last year's COVID-19 optimism looks more like a short-term rally rather than any kind of longer-term renaissance. In all the examples below, apart from Finland, trust is still considerably lower than in 2015.

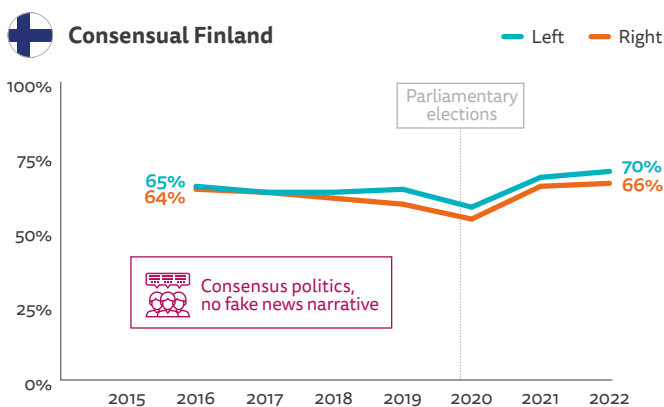
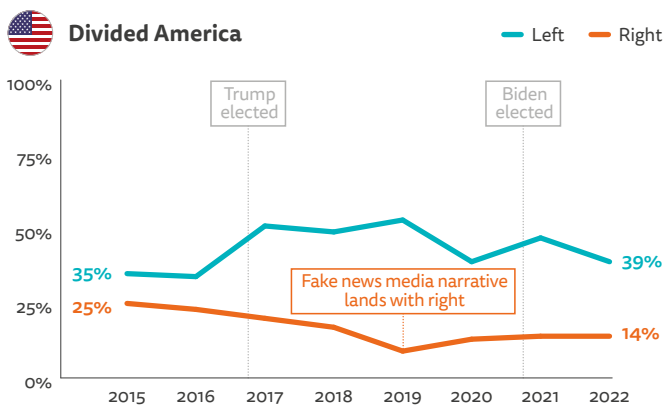
PROPORTION THAT TRUSTS MOST NEWS MOST OF THE TIME (2015-22) – SELECTED MARKETS



Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statements? – I think you can trust most news most of the time. Base: Total 2015-22 samples (n=2000).

Across our data set, and in wider research on this issue (Toff et al. 2021; Ross Arguedas et al. 2022), we find that indifference to news and its value, along with widespread perception of political and other biases by the media, are two of the main reasons for low trust. In the United States, politics is particularly central, and those who self-identify on the right are more than twice as likely to distrust the news compared with those on the left. In early 2021 only 14% of those on the political right said they trusted the news, which helps to explain how the false and misleading ‘stolen election’ narrative promoted by some politicians, activists, and partisan media personalities got so much traction, not least after President Donald Trump’s talk about a liberal mainstream media peddling ‘fake news’. By contrast, in Finland we see almost no difference in news trust based on politics, though even here the cut and thrust of a parliamentary election in late 2019 may have contributed to a slight dip in trust.

PROPORTION THAT TRUSTS MOST NEWS MOST OF THE TIME (2015–22) – SELECTED MARKETS



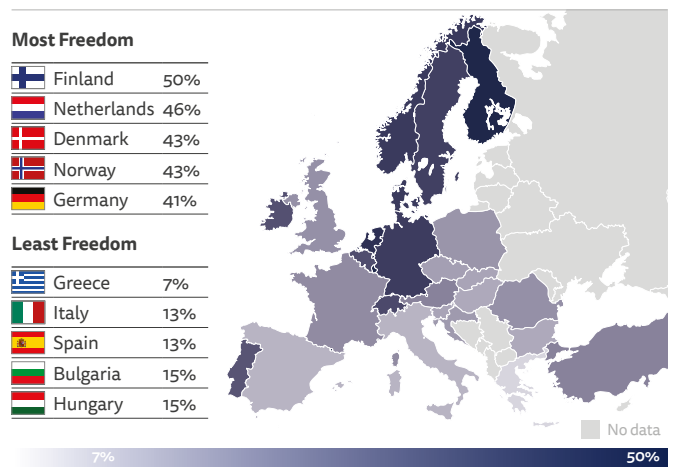
Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statements? – I think you can trust most news most of the time. Base: Left/Right from 2015–22 samples: USA = 400/500, Finland = 400/400.

For further analysis see Section 2.2: Have News Audiences Become More Polarised over Time?

In other cases, lack of trust in the news is less about ideological political divides and more about a split between the ‘haves’ and the ‘have-nots’. In France, for example, we find that divisions are more about income and education rather than party allegiance. During the Gilets Jaunes protests, for example, the news media was often seen as aligning itself with the elites, while journalists were also targeted in Canada during trucker protests this year. In both countries, we find significant trust gaps over income or education.

In other parts of the world, lack of trust is closely related to the issue of interference by politicians, businesspeople, or both. This is a particular issue in Central and Eastern Europe where oligarchs close to ruling parties control much of the media, or where governments regularly withhold advertising from publications they don’t like. Only a small minority think the news is free from undue political influence in Greece (7%), Hungary (15%), Bulgaria (15%), Slovakia (16%), Czech Republic (17%), Croatia (18%), and Poland (19%). We see similarly low levels in some Southern European countries, such as Italy (13%) and Spain (13%), where there is also a strong tradition of party-political influence over the media. Compare this with Finland (50%), where people have much higher confidence in the independence of the journalism they see from undue political influence.

PROPORTION WHO THINK THE NEWS MEDIA ARE FREE FROM UNDUE POLITICAL INFLUENCE – SELECTED MARKETS



Q6_2016_4. Thinking about news in general, do you agree or disagree with the following statements? – The news media in my country are independent from undue political or government influence most of the time. Base: Total sample in each market (n = 2000).

It is a similar story when it comes to perceptions of undue business influence, with almost identical scores in most markets. This suggests that consumers either have a clear-eyed view of the connections between politicians and businesspeople, or that they have a more generalised lack of trust about those in power and the relations they have with the news media.

However, a large minority also question the priorities of news organisations themselves. Across all markets, just 19% say all or most news organisations put what’s best for society ahead of their own commercial or political interests. In fact, many more people say that all or most put their own political views (40%) or commercial interests (42%) ahead of society. These views are held by around 20% in countries with high trust in news, such as Finland, but are held by around 45% in the US, the UK, and a majority in parts of Southern Europe, Eastern Europe, and Latin America. This may reflect cynicism about the underlying motivations of many publishers, or perhaps hardened realism about what many commercial news organisations must do to survive. Either way it reminds us that, although people often recognise the pressures they face, few people think that most news organisations fight powerful interests on behalf of society in practice.

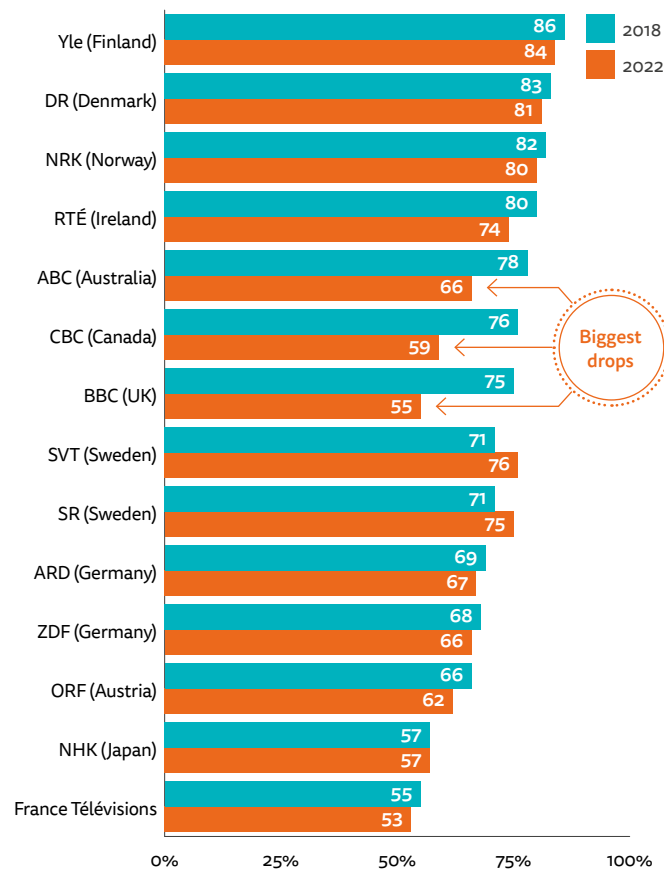
For further information on political influence and state capture see relevant country pages (e.g. Hungary, Poland, Czech Republic, and Slovakia) in Section 3

TRUST IN NEWS BRANDS: THE PARTICULAR CASE OF PUBLIC SERVICE MEDIA

Underpinning news trust in many Northern and Western European countries, as well as Canada and Australia, we find a number of public service broadcasting organisations with a strong track record of independence. These generally appear at the top of our brand trust lists in each country and are often the first port of call for audiences when looking for reliable news around important stories such as COVID-19 and the Ukraine conflict. These institutions have a very different reputation to public and state broadcasters in Southern and Eastern Europe that often take a more partisan editorial line.

But independent public media are under increasing pressure in a number of countries, with attacks on funding, questions about impartiality, and challenges in reaching younger audiences who are increasingly turning to digital and social media. The BBC faces another round of cuts after a difficult licence settlement while DR, the Danish public broadcaster, recently cut three linear channels as part of a wider restructuring after a narrow parliamentary majority imposed a major cut in funding. Against this background, it is interesting to see how well trust is holding up, with some very notable exceptions. Nordic PSBs as well as those of other smaller countries like Ireland and Portugal have retained or even increased trust since 2018, but it has been a very different story in the UK, Australia, and Canada, with significant falls for the main public broadcasters.

PROPORTION THAT TRUSTS SELECTED PUBLIC SERVICE MEDIA BRANDS 2018 AND 2022 - SELECTED MARKETS

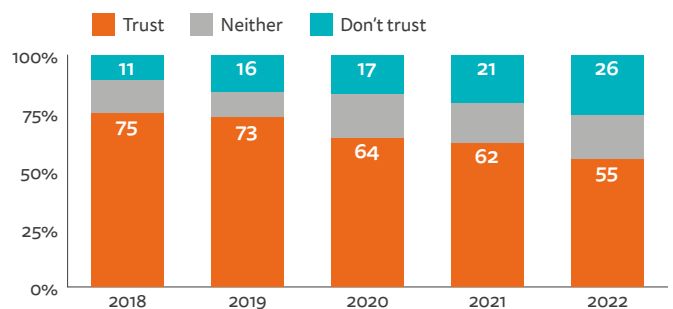


Q6_2018 trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: All in 2018 and 2022 that had heard of each brand (n = 2000). Note: Showing scores 6-10 on 10-point scale.

The BBC, which remains the most widely used news source in the UK, reported record audiences in the first weeks of the Ukraine crisis,³ but it has also come under intense criticism for its reporting of a range of more divisive issues – notably Brexit but also immigration, race, gender identity, and attitudes to COVID-19 vaccinations. In many cases, these criticisms of the BBC have been amplified on social media, with senior correspondents exposed to physical attacks along with personal abuse on social media.⁴

Trust in BBC News has fallen 20 percentage points in the last five years, from 75% to 55%. Equally telling is the proportion who say they distrust the BBC, which has grown from 11% to 26% (see next chart). The majority of these are from the political right, echoing criticism from Boris Johnson's government about an alleged anti-Brexit and liberal bias, but we also find that low trust in the BBC also comes from those who are less interested in news altogether. It is important to note that other big brands in the UK (e.g. the *Guardian* and the *Mail*) have been affected by growing levels of distrust, though not as severely. Declining trust is a particular challenge for public media organisations, as they try to fulfil their mission to appeal to all audiences.

PROPORTION THAT TRUSTS THE BBC (2018-22) - UK



Those that **don't trust** the BBC are **more likely to be men**. Tend to be less interested in news and have lower levels of education.

More likely to **only use social media** as a source of news.

Over half of this group **voted Conservative** at the last election (2019), **two thirds voted for Brexit**.

Q6_2018 trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: All in 2018-22 that had heard of the BBC (n = 2000). Note: Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.

The continued audience success of some European public media makes them a particular target for those who want to influence the debates on politics and wider issues around culture. Our survey shows that journalists from these organisations are often first to be recognised by the public. The outgoing BBC political editor Laura Kuenssberg is by far the most well-known journalist in the UK, according to respondents to our survey, even when it comes to digital news. Broadcasters with a commitment to impartiality, including the BBC, make up 62% of all mentions. Journalists from public media also feature strongly in data from Finland, France, and Germany. But it is a very different story in the United States, where partisan cable TV hosts Tucker Carlson, Rachel Maddow, and Sean Hannity attract the most attention.

³ During the first week of the conflict, the BBC estimated 280 million people used its news output in the UK and around the world. <https://www.independent.co.uk/news/uk/bbc-ukraine-tim-davie-nadine-dorries-bbc-news-b2047209.html>

⁴ <https://www.theguardian.com/uk-news/2022/feb/17/bbc-sarah-smith-relieved-to-escape-scottish-bile-and-hatred>

Best known journalists in Northern/Western Europe have reputation for **impartiality**



LAURA KUENSSBERG
BBC Political Editor
(outgoing), UK

ALSO

- Marietta Slomka**
ZDF TV Anchor, Germany
- Matti Rönkä**
Yle TV Anchor, Finland

Best known journalists in USA have reputation for **strong opinion**



TUCKER CARLSON
TV Anchor,
Fox News

ALSO

- Sean Hannity**
Fox News
- Rachel Maddow**
MSNBC

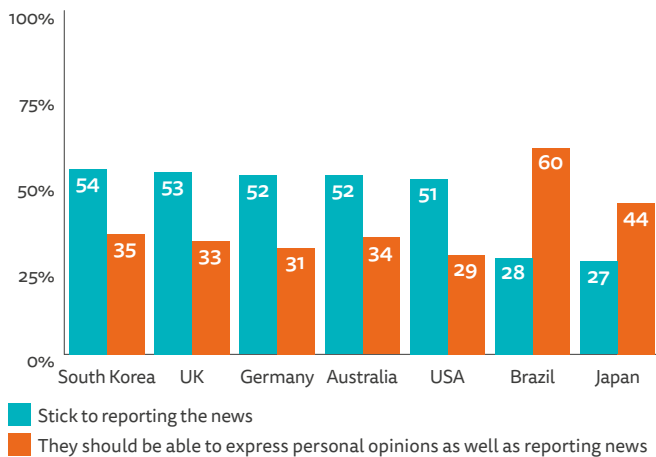
For further analysis see Section 2.5: Which Journalists do People Pay Most Attention to and Why? A Study of Six Countries

Should journalists remain impartial when on social media?

With more journalists building channels and direct relationships on social media, there is a growing debate about how they should interact when on platforms such as Facebook and Twitter. These are informal spaces where social media users can let their hair down and show more personality. But how compatible is this with the impartial or objective approaches still practised by many media brands (and that last year we found many members of the public value)?

In our survey, around half of respondents or more in most countries feel that journalists should stick to reporting the news, but a sizeable minority believed they should be allowed to express their personal opinions on social media at the same time. Brazil and Japan seem to be outliers here, showing opposite views.

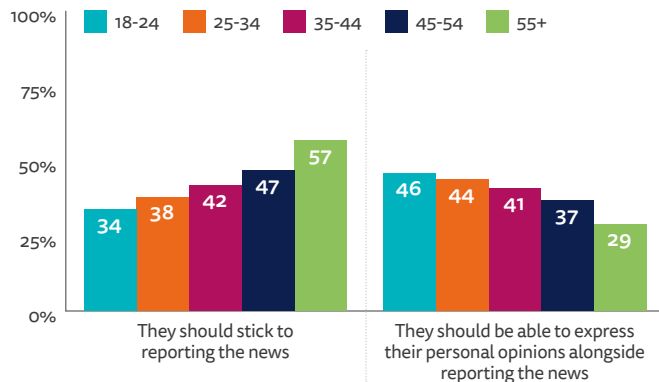
PROPORTION WHO THINK JOURNALISTS SHOULD STICK TO REPORTING THE NEWS ON SOCIAL MEDIA – SELECTED MARKETS



Q Journalists 4. Which of the following comes closest to how you think journalists should use social media like Twitter and Facebook? Base: Total sample in each market.

But as we also found in last year's Digital News Report study on impartiality (Vir 2021), there are clear generational differences, with younger groups holding a stronger preference for journalists being able to express their personal opinions freely on social media. As some media organisations tighten social media guidelines, they are facing resistance from younger journalists who take a different view, and are trying to push the boundaries. This is just another way in which journalistic norms are being challenged by social and digital media.

PROPORTION WHO THINK JOURNALISTS SHOULD STICK TO REPORTING THE NEWS ON SOCIAL MEDIA – BY AGE – SELECTED MARKETS



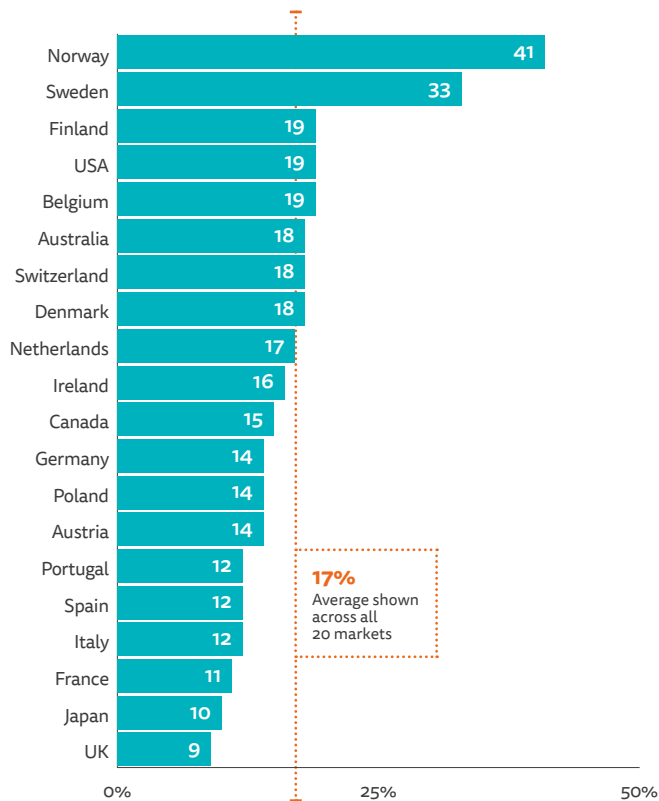
Q Journalists 4. Which of the following comes closest to how you think journalists should use social media like Twitter and Facebook? Base: 18-24/25-34/35-44/45-54/55+ in Australia, Brazil, Germany, Ireland, Japan, Norway, South Korea, UK, USA = 1884/2974/3306/2884/7527. Note: This question was only asked in the countries listed.

PAYING FOR NEWS, SUBSCRIPTION FATIGUE, AND THE BATTLE FOR REGISTRATION

In the last few years, many publishers have been increasing efforts to get audiences to pay for content online via subscription, membership, or donations – to reduce their reliance on advertising revenue, which online tends to flow towards the big platforms such as Google and Meta (formerly Facebook). These are now worldwide trends, and our country pages (Section 3) document how leading publishers in Argentina, Colombia, Japan, Nigeria, and Kenya, for example, have recently launched or consolidated paywalls.

This year's data show mixed progress, with significant increases in a small number of wealthier countries, though there are signs elsewhere that growth may be levelling off. Across a basket of 20 countries where payment is relatively widespread, 17% paid for any online news – the same figure as last year. Norway continues to lead the way (41%), followed by Sweden (33%), Finland (19%), and the United States (19%). Australia (18%) and Germany (14%) showed the biggest increases this year at five percentage points in each case. By contrast, our survey data in Norway and the United States show a slight decline this year, though in both cases industry figures suggest that there has still been some progress. Either way, longer term trends do suggest a slowing down in some of these early-mover markets – raising questions about whether they might be reaching a more mature phase.

PROPORTION WHO PAID FOR ONLINE NEWS IN LAST YEAR (SUBSCRIPTION, MEMBERSHIP, DONATION, OR ONE-OFF PAYMENT) – SELECTED MARKETS



Q7a. Have you paid for ONLINE news content, or accessed a paid-for ONLINE news service in the last year? (This could be digital subscription, combined digital/print subs or one-off payment for an article or app or e-edition). Base: Total sample in each market (n = 2000).

This year we asked those paying for online news to name the brands they subscribed to. In some countries, we find a high degree of market concentration, with around half the subscriptions in the US going to the *New York Times*, *Washington Post*, and *Wall Street Journal*. In Finland, half of subscribers (50%) pay for just one publication – *Helsingin Sanomat*, the country's paper of record – sometimes in combination with a local publication. Over half (53%) pay for a local or regional title in Norway, with high numbers in all the other Nordic countries as well as Germany (35%) and the United States (27%). By contrast, just 5% of subscribers pay for a local title in the UK and 3% in Portugal.

Another striking finding is that, across countries, the vast majority of those paying are older, with an average age of 47 across countries. Persuading younger people to pay remains a critical issue for industry, with just 8% of news subscribers in the UK being under 30 and just 17% in the United States. This quote from our focus groups sums up the attitude of many of those who grew up in an era with mostly free online sources.

I don't like when the New York Times asks me to subscribe to read the news. It's a scam. News is meant to be free.

Male, 27, USA

PROFILE OF ONGOING DIGITAL NEWS SUBSCRIBERS – SELECTED MARKETS

Country	Median number of subscriptions	% of subscribers aged under 30	% subscribe to local titles	% subscribe to foreign titles
Norway <i>Top national titles</i>				
Norway <i>VG, Aftenposten, Dagbladet</i>	1	14	53	3
Sweden <i>Aftonbladet, Dagens Nyheter</i>	1	16	43	5
United States <i>New York Times, Washington Post</i>	2	17	27	7
Finland <i>Helsingin Sanomat, Aamulehti</i>	1	15	39	3
Belgium <i>Het Laatste Nieuws, Le Soir</i>	1	26	16	8
Australia <i>The Australian, Guardian, Herald Sun</i>	2	16	36	9
Denmark <i>Berlingske, Politiken</i>	1	20	20	5
Switzerland <i>Tages-Anzeiger, NZZ</i>	1	18	39	14
Netherlands <i>De Telegraaf, AD, Volkskrant</i>	1	34	38	7
Ireland <i>Irish Times, Irish Independent</i>	1	19	6	48
Canada <i>Globe & Mail, Toronto Star</i>	1	19	15	39
Germany <i>Bild, Der Spiegel</i>	1	26	35	8
Austria <i>Kronen Zeitung, Der Standard</i>	1	12	14	7
Spain <i>El País, El Mundo, La Vanguardia</i>	1	28	5	8
Italy <i>Corriere della Sera, Il Sole 24 Ore, La Repubblica</i>	1	17	14	6
Portugal <i>Público, Expresso</i>	1	20	3	4
France <i>Le Figaro, Le Monde, L'Equipe</i>	1	28	23	6
Japan <i>Nikkei, Asahi Shimbun Digital</i>	1	13	N/A	N/A
UK <i>Telegraph, Times of London, Guardian</i>	1	8	5	6

Q7_SUBS_name_2022. You said you have paid a subscription/membership to a digital news service in the last year... Which of the following did you subscribe to? Base: All that paid for an ongoing subscription/membership to a digital news service in the last year. Range: France = 139 to Norway = 647.

In almost all of the listed countries, the majority of subscribers pay for one publication. But in the United States and Australia, around half (56% and 51% respectively) now pay for two or more – often a national and local paper combination. Second subscriptions in the United States include political and cultural magazines such as *The Atlantic* and *The New Yorker*, partisan digital outlets such as Blaze Media and Epoch Times, or passion-based titles such as the Athletic (sports). We also see growing levels of payment for platform-based news subscription products Apple+ and Twitter Blue. In Australia, second subscriptions include a relatively high proportion (9%) from US or UK publications such as the *New York Times* and *The Times* of London.

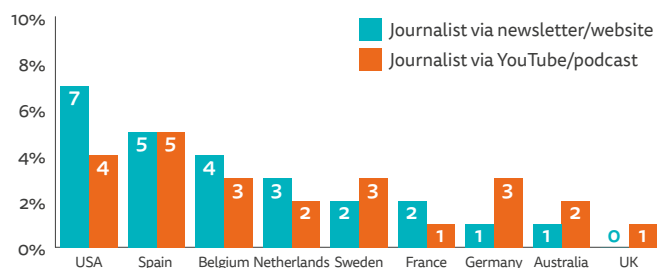
The influence of individual journalist brands may be overstated

Some news brands continue to have the reputation, scale, and technical capability to charge for their services, but in parallel the emergence of low-cost subscription and membership platforms, like Substack and Patreon, has enabled some individual journalists, podcasters, or other creators to also convince people to pay for their work. Substack says that there are now around a million paying subscribers to its premium content emails.⁵

Despite this, our data show the number of these individual subscriptions is still relatively modest, certainly when compared with established news brands. Even in the United States, we find that just 7% of news subscribers in the United States pay for one or more journalist emails – around 1% of our overall sample. The proportions are even lower elsewhere, though we do see some emerging payment for individual email writers or podcasters in parts of Europe and Australia.

Over time, it is possible that these solo or small businesses, mostly operating in closely defined niches, could make up a far bigger part of the overall pie, expanding the market but also creating more competition for big news brands. If nothing else, they have already made the value of some individual journalists more explicit, pushing up wages of top talent.

PROPORTION OF SUBSCRIBERS WHO PAY FOR INDIVIDUAL JOURNALISTS VIA EMAIL OR OTHER SERVICES – SELECTED COUNTRIES



Q7_SUBS_name_2022. You said you have paid a subscription/membership to a digital news service in the last year ... Which of the following did you subscribe to? Base: All who made a regular payment to at least one digital news service in last year. USA = 304, Spain = 153, Belgium = 211, Netherlands = 221, Sweden = 487, France = 135, Germany = 183, Australia = 270, UK = 160.

These data also highlight the growing importance of formats like email and podcasts, both of which have become much more important in driving regular engagement for all publishers – from general news to specialist information and entertainment.

For further analysis see Section 2.4: *Email News: Its Contribution to Engagement and Monetisation*

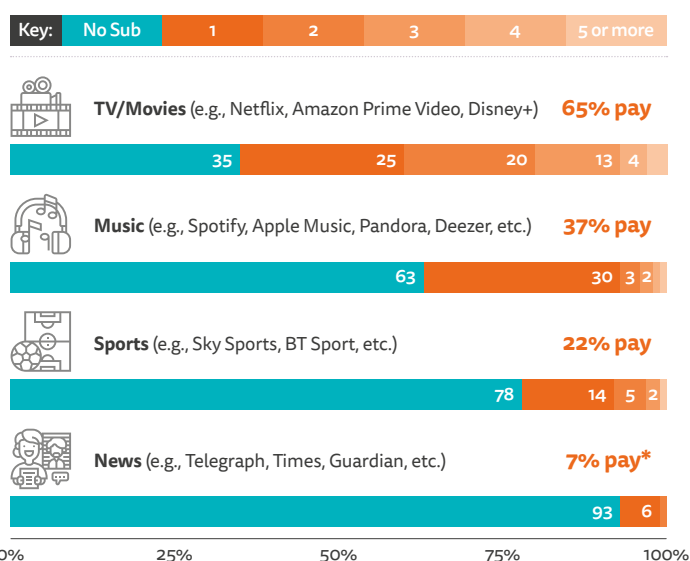
In the vast majority of markets in our survey, people say they still identify most with traditional news brands rather than individual journalists. This is especially true in Nordic countries but less true in the United States, Southern Europe, Latin America, and parts of Asia. Perhaps the greater affinity with journalists in these countries offers a different opportunity to monetise content than brand-led subscription.

The impact of wider media subscriptions and prospects for subscription fatigue

With rising energy prices and inflation, and with many different types of online media (TV, music, books) now competing for a share of household budgets, there are genuine fears in the industry about whether recent growth in news subscriptions can continue. Against this backdrop, we explored the characteristics of different media subscriptions and asked respondents whether they were thinking of taking out more – or cutting back.

Taking the UK as an example of an advanced subscription market (chart below), we find almost two-thirds of our sample (65%) have taken out at least one subscription to a TV or film service like Netflix, 37% have a music subscription to Spotify or similar, 22% pay for a premium sports service, and 7% have a news subscription or other ongoing payment such as a donation. Because premium content is spread across TV platforms, many people feel the need to take out more than one subscription, with 19% taking out three or more. By contrast, one music or news service is normally enough, as rival services often offer broadly similar content. But as we noted earlier, in some countries we are seeing more differentiated news services and a consequent rise in the number of subscriptions per person. The other big difference is the age profile, with TV, music, and audio books skewing younger, while sport has an equal age split and news skews much older. People who subscribe to news are more likely to subscribe to other services and vice versa.

PROPORTION WHO SUBSCRIBE TO DIFFERENT MEDIA SERVICES – UK

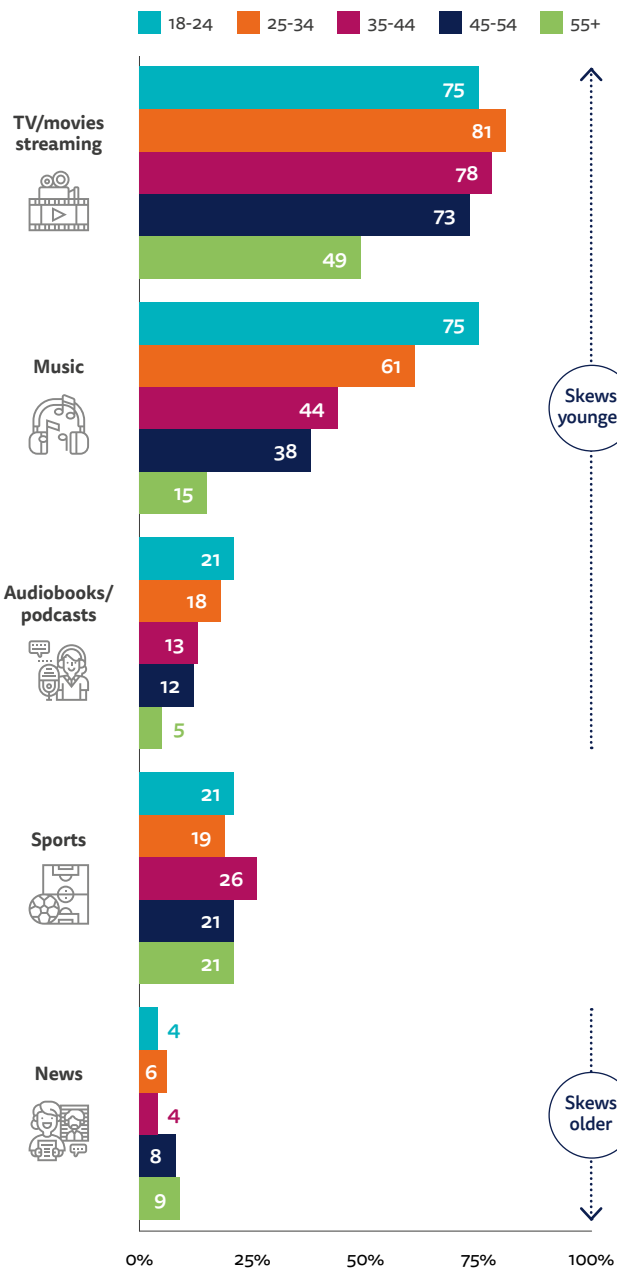


* Note: 7% pay for a news subscription or other ongoing subscription, 9% for any payment incl. one-off payments and donations.

Q_Sub_fatigue1. There are many different online media subscriptions you can pay for these days. How many of the following online media subscriptions do you currently have, if any, that you pay for with your own money? **Q7_SUBS.** You said you have paid a subscription or made an ongoing donation to a digital news service in the last year. How many different news providers do you regularly pay money to? Base: UK = 2410.

⁵ <https://www.forbes.com/sites/marisadellatto/2021/11/15/substack-announces-one-million-paid-subscribers/>

PROPORTION WHO SUBSCRIBE TO EACH TYPE OF MEDIA SERVICE - BY AGE - UK

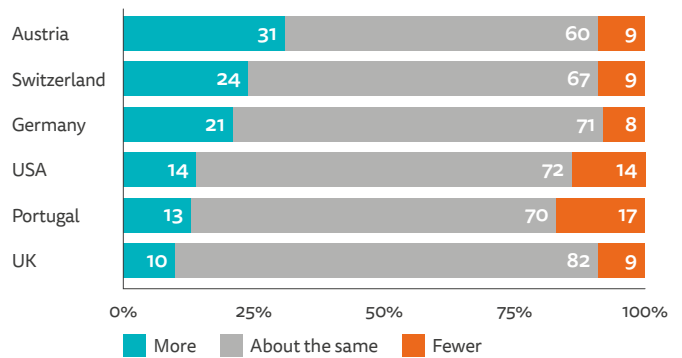


Q_Sub_fatigue2. There are many different online media subscriptions you can pay for these days. How many of the following online media subscriptions do you currently have, if any, that you pay for with your own money? **Q7a1.** Which, if any, of the following ways have you used to pay for online news content in the last year? *Base: UK = 2410.*

Thinking about the year ahead, most respondents say the number of media subscriptions they have (across TV, music, sports, books, and news) will stay the same, but there is an appetite to take out more in Germany, Austria, and Switzerland. By contrast, the Portuguese are most likely to be looking to *reduce* their media subscriptions this year, while respondents in the UK and US are evenly split.

This overall picture is perhaps more optimistic than might be expected, with relatively low subscription churn, providing publishers with a more stable and secure income than the frequent ups and downs of the advertising market. On the other hand, the cost-of-living crisis has been building since our survey in January and will clearly be a significant factor for those on lower incomes.

PROPORTION WHO THINK THEY WILL HAVE MORE/FEWER MEDIA SUBSCRIPTIONS NEXT YEAR - SELECTED MARKETS



Q_Sub_fatigue2a. In the next year, do you expect the number of online media subscriptions you pay for with your own money to increase, decrease, or stay the same? *Base: Total sample in each market. Note: Don't knows were excluded.*

Energy costs, along with petrol and food prices are all rising. Luxuries will need to be cut to free up more money.

Female, 57, UK

I'm on a tight budget and with soaring inflation and gas prices going up and groceries prices are outrageous ... I have no extra money for media subscriptions.

Female, 62, USA

It's not entirely clear whether news will be treated in the same bucket as entertainment subscriptions that could be seen as more of a luxury. The news demographic tends to be older and richer, perhaps making the group less affected by rising prices. On the other hand, the sector is unlikely to be immune from these trends and a number of respondents said they would be cancelling subscriptions to news sites because they were too expensive. Others say they are planning to increase the number of subscriptions this year, with some seeing the current national and international instability as a good reason to invest more in high-quality information.

I feel that this time is the most important time to know as much news and information about our surroundings as possible.

Male, 33, USA

Investment in new products may encourage further take-up and much of the news industry remains confident about longer-term trends. But some publishers, notably CNN, recently reversed its much-hyped online paywall strategy (CNN+) amid doubts from its new owners about the viability of yet another stand-alone subscription.⁶ Uncertainty remains about how far and fast the market can grow, especially in more troubled economic times.

⁶ <https://edition.cnn.com/2022/04/21/media/cnn-shutting-down/index.html>

Audiences reluctant to give up their data for news sites

Beyond concerns about subscription diets, media companies face another challenge in maintaining advertising revenues in the face of the imminent phasing out of third-party cookies.⁷ Without these cross-platform trackers, media companies are looking to build up their own first-party data that can give them more leverage with advertising companies – and increase the rates they can charge. News companies now routinely ask for an email address before people can see content or access additional features such as commenting. In some countries (Portugal, Finland, and Switzerland), publishers have collaborated to provide a single login system that works across multiple online websites and apps. But how do audiences view these issues?

Across countries we find that only around a quarter (28%) have registered for one or more news websites in the last year. Those in Portugal (44%) are most likely to have given their details, but people in Germany (19%), the UK (16%), and Japan (14%) are least likely to have parted with their information for access. These differences may relate to the extent to which registration walls are being pushed by publishers in each country, but the relatively low levels in general reflect a continuing reluctance amongst consumers to give up email addresses or other personal details – especially if content is available elsewhere. Most news websites simply do not have a clear enough value proposition to persuade people to do so.

PROPORTION WHO REGISTERED FOR A NEWS SITE IN THE LAST YEAR – SELECTED MARKETS



REGISTER1. Some online news outlets now ask you to register (for example to give an email address or set up an account) before they will give you full access to their content. Have you done this in the last year? Base: Total sample in each market (n = 2000).

We also compared willingness to give data to news sites with other digital services such as online retailers and social media apps. Across our entire sample, only around a third (32%) say they trust news websites to use personal data responsibly – ahead of social media sites (25%), but at a similar level to trust in online retailers (33%). This does vary considerably by country, with 49% of Finns prepared to trust news organisations with data, but only 18% in the United States.

PROPORTION WHO TRUST EACH TO USE THEIR DATA RESPONSIBLY – ALL MARKETS



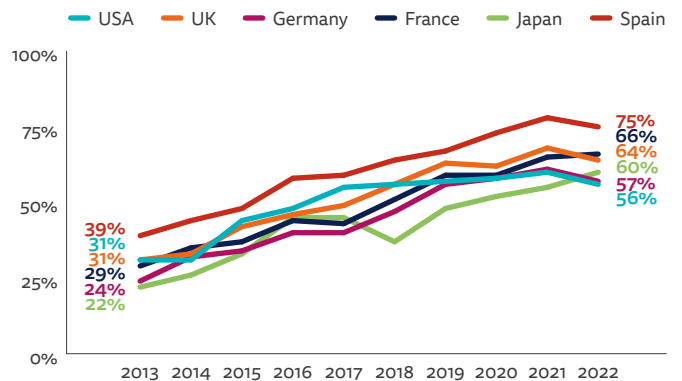
REGISTER2 1/2/3 I trust most news websites/social media sites/online retailers to use my data responsibly. Base: Total sample: All markets = 44,924.

We find a clear link between general trust and people's willingness to trust publishers with their data. Those with the highest levels of trust (48%) are more than twice as likely to give up their data than those with the lowest (19%). In this respect, building trust will be critical not just for those pursuing subscription models but for any publisher looking to engage and connect with audiences more deeply in the future.

DEVICES AND ACCESS POINTS TO NEWS

The smartphone continues to be the most important digital device for accessing news across countries, though our data suggest the first decline in weekly access since our survey began – reflecting falling news consumption across all devices after COVID-19 highs.

PROPORTION WHO USED A SMARTPHONE FOR NEWS IN THE LAST WEEK (2013-22) – SELECTED MARKETS



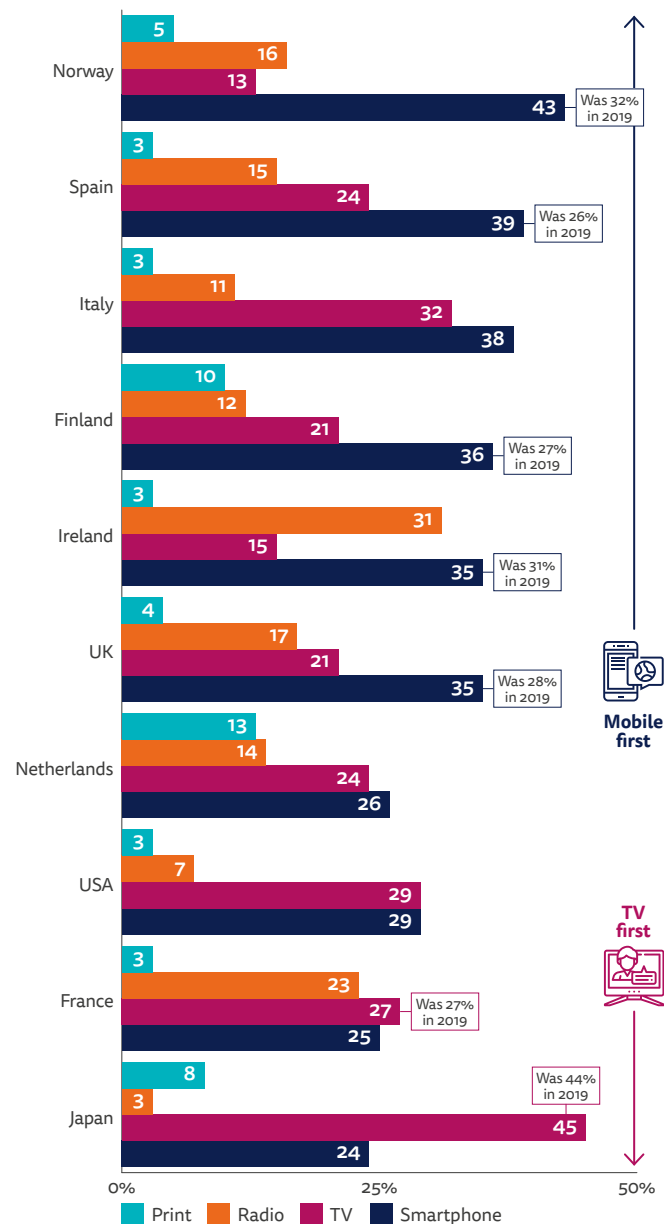
Q8b. Which, if any, of the following devices have you used to access news in the last week? Base: Total 2013-22 sample in each market (most n = 2000).

⁷ In January 2022 Google announced it will stop the use of third-party cookies in its popular Chrome web browser by the end of 2023, joining a growing list of browsers and platforms that are stopping support for this tracking technology.

This year, we revived a question about how different groups access news *first thing in the morning* to give a sense of how news habits have changed since 2019. The next chart shows striking differences between countries. In Norway, Spain, Finland, and the UK, the smartphone is now the go-to route to news in the morning, with dependence on it growing substantially in the last three years. Radio remains an important part of morning routines in Ireland – even though it has been overtaken by the smartphone for the first time. Morning newspaper reading is still surprisingly popular in the Netherlands and Finland. Television remains a key influence in the US, France, and Italy and is the dominant medium in Japan.

Across countries, almost half of under 35s (47%) say they accessed news first using a smartphone, compared with just a quarter (28%) of those aged 35 and older and just 15% of those aged 65 and older. Japan's older population may explain why it is bucking wider trends.

PROPORTION WHO SAY EACH DEVICE IS THEIR FIRST WAY OF ACCESSING NEWS IN THE MORNING – SELECTED MARKETS

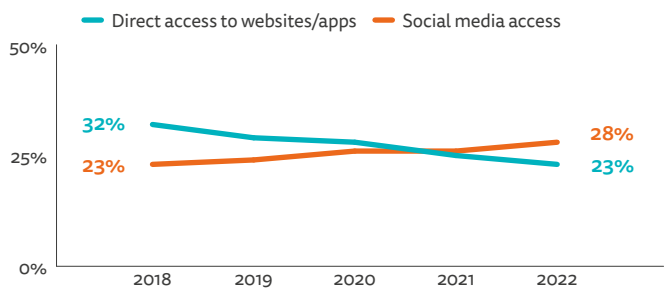


But what channels do people use when accessing news on a smartphone at the start of each day? Since 2019, we find that, across countries, social media (39%) have overtaken websites and apps (31%), followed by the smartphone home screen (12%) and aggregator apps like Apple News (9%).

Main gateways to digital news

We continue to monitor the main access points to online news, not just via a smartphone and not just first thing in the morning. Across all devices, our data show direct access to apps and websites becoming less important over time and social media becoming more important, partly due to their ubiquity and convenience. At an aggregate level, we have reached something of a tipping point this year, with social media preference (28%) surging ahead of direct access (23%). But these are cross-market averages and there are major differences between markets. Audiences in Nordic countries and the UK still have strong direct connections, while people in Japan and South Korea tend to access news via powerful aggregators and search engines – relying less on direct access. These differences, which we can perhaps treat as a proxy for the strength of news brands in a digital world, help explain why it may be easier to charge for online news in some countries and not others.

PROPORTION WHO SAY EACH ACCESS POINT IS THEIR MAIN GATEWAY TO ONLINE NEWS (2018–22) – ALL MARKETS



MAINLY DIRECT

Finland	65%
Norway	59%
UK	46%

MAINLY SOCIAL

Thailand	59%
Philippines	51%
Kenya	51%

MUCH LESS DIRECT

South Korea	5%
Brazil	11%
Mexico	11%

MUCH LESS SOCIAL

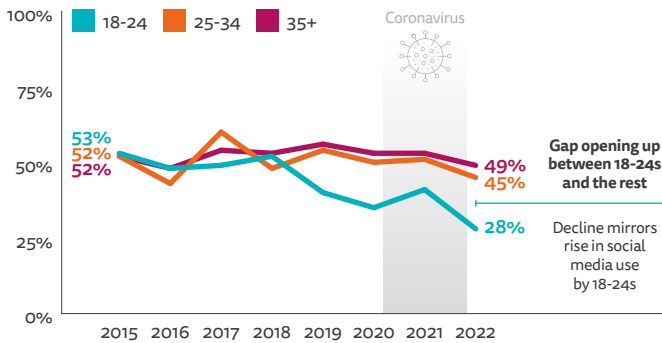
Japan	9%
Sweden	10%
Finland	11%

Q10a. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which of these was the ****MAIN**** way in which you came across news? Base: All markets 2018–22 and total sample in each market (n = 2000). Note: Number of markets grew from 37 in 2018 to 46 in 2021–22.

Q9c_new2016. What is the **FIRST** way you typically come across news in the morning? Base: Total sample in each market (n = 2000).

These changes are in large part driven by the emerging habits of a new generation of *social natives* as they come into adulthood. In the next chart, which shows main access by age in the UK, we find that millennials within our 25–34 group (orange line) and those older than 35 (magenta line) have only slightly changed preferences over time, but the 18–24 group (turquoise line) has become significantly less likely to use a news website or app. This is another illustration that this youngest generation, which has grown up with social media, is not just different but is more different than the one that came before.

PROPORTION WHO START THEIR NEWS JOURNEY WITH A NEWS WEBSITE OR APP – BY AGE – UK



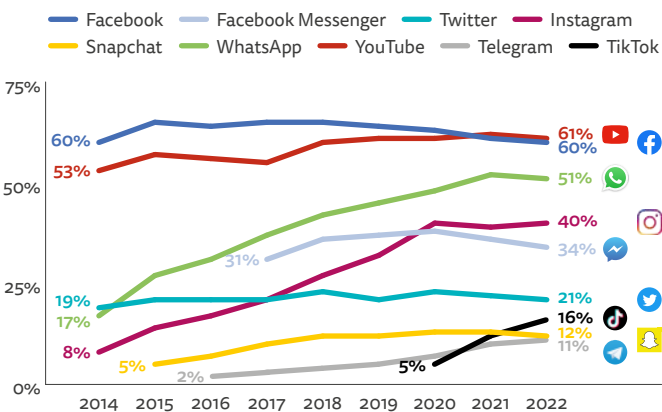
Q10. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which were the ways in which you came across news stories? Base: 2018–22; 18–24 = 200, 25–34 = 300, 35+ = 1500.

For further analysis see Section 2.3: The Changing News Habits and Attitudes of Younger Audiences

IS FACEBOOK LOSING ITS SHEEN?

Each year since 2014, we have tracked the different social networks used for any purpose and for news across 12 countries. Facebook usage for any purpose (60%) is down five percentage points since its peak in 2017 and is now at a similar level to YouTube. Instagram (40%), TikTok (16%), and Telegram (11%) are the only networks to have grown in the last year.

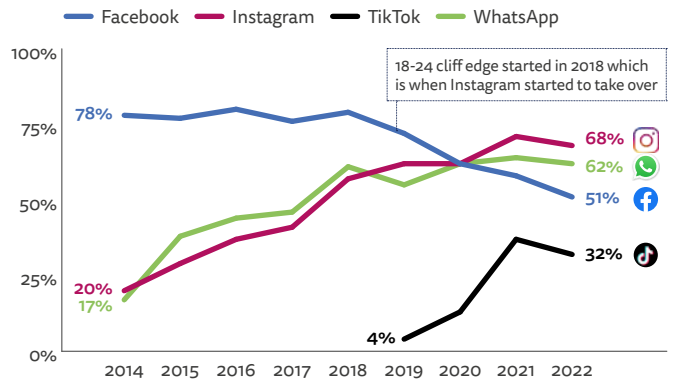
PROPORTION THAT USED EACH SOCIAL NETWORK FOR ANY PURPOSE IN THE LAST WEEK (2014-22) – AVERAGE OF 12 MARKETS



Q12a. Which, if any, of the following have you used in the last week for any purpose? Base: Total 2014–22 sample in selected markets (most n = 2000). Note: From 2015–21 the 12 countries included are: UK, USA, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia, and Brazil. In 2014 we did not poll in Australia or Ireland.

Once again, most of these changes – such as the decline in Facebook use over the last few years – result from shifts in behaviour of the youngest cohort of social natives, not older respondents, who tend to have more entrenched habits. In the following chart from the UK, we illustrate how the attention of this group has gradually shifted – from Facebook, to Instagram, and now to TikTok.

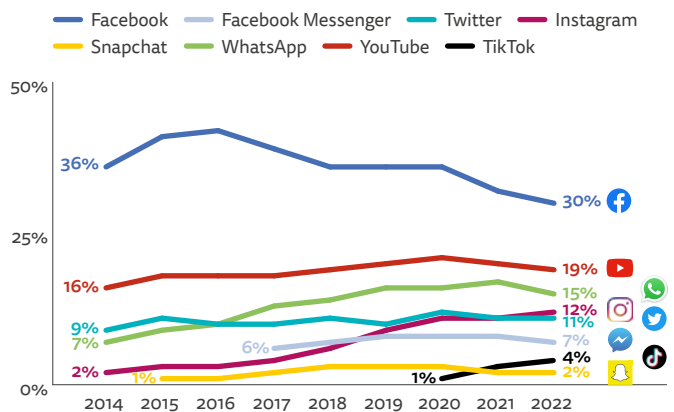
PROPORTION OF 18–24s (SOCIAL NATIVES) WHO USED EACH SOCIAL NETWORK FOR ANY PURPOSE IN THE LAST WEEK (2014-22) – UK



Q12a. Which, if any, of the following have you used in the last week for any purpose? Base: 2014–22; 18–24s = 200.

When it comes to news usage specifically, Facebook remains the most important network across our basket of 12 countries, but has dropped by 12 percentage points since 2016. Twitter has largely stagnated over the last decade in terms of its user base, though it remains hugely influential with journalists and politicians. Confusion over its future direction is likely to persist following the attempt to take over the company by Elon Musk⁸ and the subsequent loss of senior executives. Meta-owned Instagram is now more widely used for news, while TikTok has overtaken Snapchat from a low base.

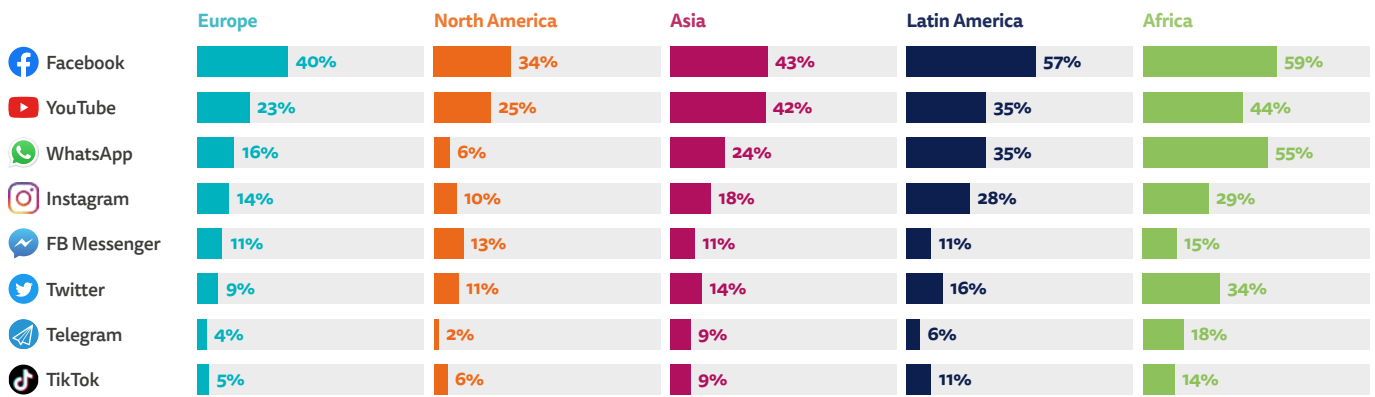
PROPORTION THAT USED EACH SOCIAL NETWORK FOR NEWS IN THE LAST WEEK (2014-22) – AVERAGE OF 12 MARKETS



Q12b. Which, if any, of the following have you used in the last week for news? Base: Total 2014–22 sample in selected markets (most n = 2000). Note: From 2015–21 the 12 countries included are: UK, USA, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia, and Brazil. In 2014 we did not poll in Australia or Ireland.

⁸ <https://www.cnn.com/2022/04/26/elon-musks-twitter-takeover-sets-up-a-potential-clash-with-europe.html>

PROPORTION THAT USED EACH SOCIAL NETWORK FOR NEWS IN THE LAST WEEK – SELECTED REGIONS



Q12B. Which, if any, of the following have you used for news in the last week? Base: Total sample in each region. Europe = 48,836, North America = 4048, Asia = 20,349, Latin America = 12,104, Africa = 6057. Note: Africa average is Kenya, South Africa, and Nigeria only (English speakers in South Africa and Nigeria).

Outside Western countries – especially in Latin America and Africa – we find a much higher proportion of our sample using social media for news, but we also find different networks in play. In African countries such as Nigeria, South Africa, and Kenya, WhatsApp (55%) and Telegram (18%) combined are more important for finding, sharing, and discussing news than Facebook (59%). Latin Americans tend to use a combination of all the main networks, while it is a mixed picture in Asia, with almost three-quarters (73%) using Facebook for news in the Philippines but just 5% in Japan, where Twitter (18%) and Line (16%) are more popular. YouTube (44%) is the main social network for news in South Korea, along with home-grown app KakaoTalk (24%) and KakaoStory (5%).

TikTok emerges as a significant new player in the news ecosystem

In our data, we find significant and rapidly growing usage of TikTok, especially in Africa, Asia, and Latin America as well as across Eastern Europe. Usage is mostly still with under 25s, but is extending into all age brackets in countries with higher levels of usage, such as Kenya, South Africa, Thailand, Indonesia, Brazil, and Peru. This quote from our Brazil qualitative research sums up how perceptions of content on TikTok have changed in the last year or so.

When TikTok was launched, it was just about dancing, choreography; not today, even though the videos are fast, they bring immediate information.

Male, 24, Brazil

The Russia-Ukraine conflict has increased the profile of the network globally. Ukrainians have been documenting their experience of the war, including leaving their homes as refugees, clocking up millions of views in the process (see picture above right). As we noted last year, many publishers have been increasing their investment, but some worry that a platform where entertainment content is so sought-after may not be the most effective place for news. BBC News originally decided to avoid TikTok, but has now set up channels in Russian and English after seeing misleading information being shared on the platform around the war in Ukraine.

In contrast to traditional networks such as Facebook or Twitter, the content of the main TikTok feed is driven less by who you follow and more by an algorithm that takes into account what you like and what others are watching.



Markets with highest usage (all ages) % for any purpose/for news

Kenya	43%/15%	Peru	37%/16%
Thailand	42%/22%	Mexico	35%/10%
South Africa	41%/15%		

Q12a/b. Which, if any, of the following have you used in the last week for any purpose/news? Base: Total sample in each market (n = 2000).

It's so addictive ... and where it lacks in trustworthiness, it excels in presentation. It's a news source I end up consuming because I'm also often scrolling TikTok for other reasons, but the algorithm ends up providing news anyways.

Female, 22, USA

But others remain sceptical about the value of very short videos designed for popularity.

I greatly dislike everything about the presentation of TikTok [and Instagram]. Everything about it screams a lack of professionalism and research and I cannot trust it, along with it being obnoxiously loud.

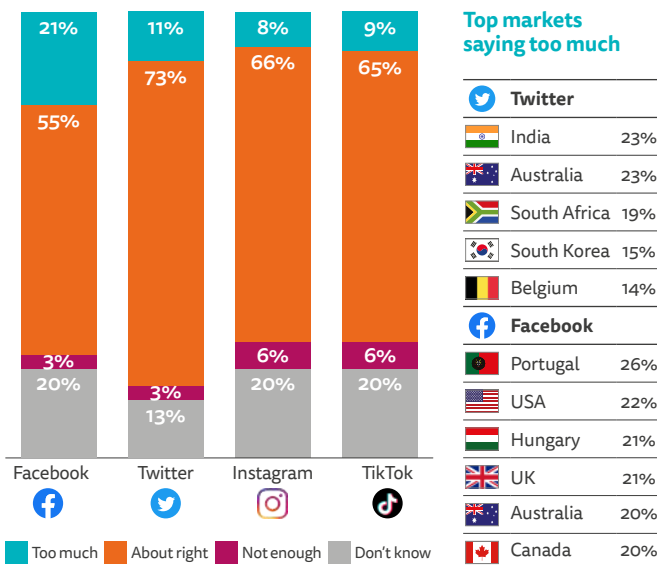
Male, 18, USA

How much news do people see on each platform?

Facebook tells us that about 4% of the content of the average person's feed comes from news outlets, though for some that proportion will be much higher.⁹ Twitter does not provide equivalent data, but our survey shows that across markets it has a high proportion (56%) who use it for news weekly. By contrast, only around four in ten (39%) Instagram users access news via the platform weekly and just a third of TikTok users do the same (33%). But do people think they are seeing too much or too little news in these networks?¹⁰

More than a fifth of UK respondents (21%) feel that they see too much news on Facebook and only 3% would like to see more. Facebook has been trying to reduce the amount of news on the platform partly for reputational reasons but also because, as previous research shows, people are mainly there to connect with friends and family rather than consume news. On the other hand, Twitter is seen as having more of a reputation for news so it is somewhat surprising to find one in ten (11%) saying they see too much. There is a clear link with news avoidance: those who often avoid the news are twice as likely to say they see too much news on both Facebook and Twitter when compared with the average user.

PROPORTION WHO THINK THEY SEE TOO MUCH NEWS ON EACH NETWORK – UK



Q12. Social rightsize ... Do you think that the amount of content you see from news outlets on <social network>. is too much, about right, or not enough? Base: All that use each social network: Facebook = 1501, Twitter = 685, Instagram = 859, TikTok = 270.

These data suggest the ambivalent relationship many people have with news on social media. It drives much of the conversation and engagement but can also interrupt other activities and create arguments. This dilemma may be one of the factors behind Facebook's recent decision to create a separate tab in five countries (Facebook News) with content from a selection of partner publishers, in parallel with an ongoing string of decisions in recent years to reduce the amount of news in the main 'Feed' (recently renamed from 'News Feed'). Platforms like Twitter might also need to think about why even some people who love the news want to see less of it, given the network's reputation for often abusive debate. TikTok and Instagram will also be aware, as they grow, of the careful balance they need to strike if they are not to put people off.

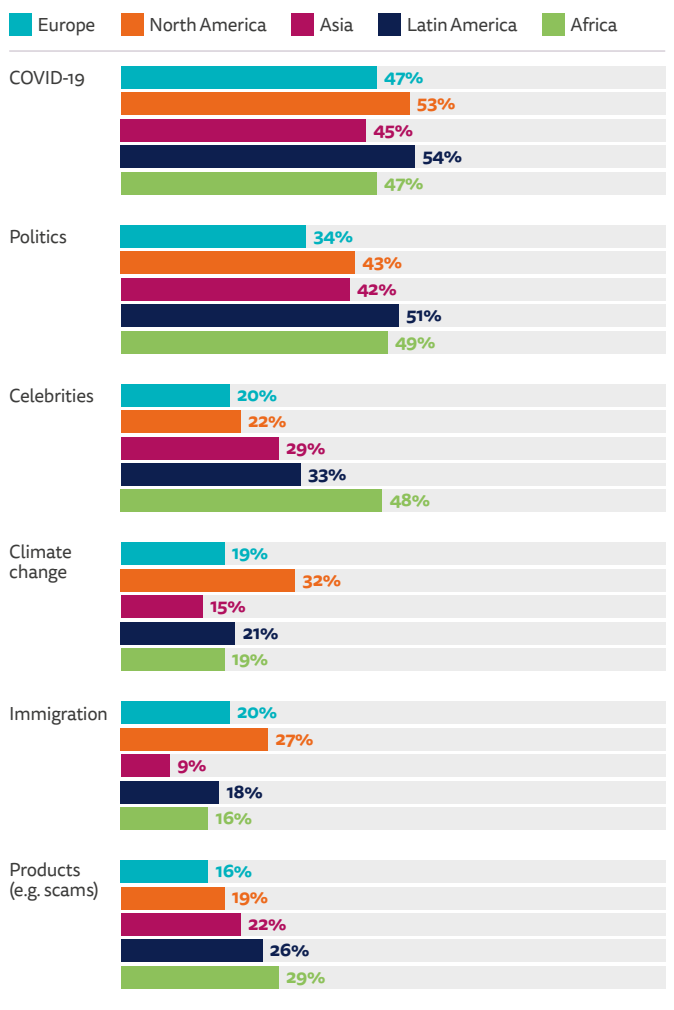
⁹ <https://www.cnbc.com/2018/01/19/facebooks-news-feed-survey-users-to-find-high-quality-news.html>
¹⁰ We did ask respondents directly to estimate how much news they saw in each of their social media feeds, partly to prime them for this subsequent question about too much/too little. We have preferred to use data on the proportion who say they use each network for any purpose/for news as they show similar trends and are data we collect every year.

MISINFORMATION

In this year's survey we find a link between online misinformation fears and the widespread use of social media. Across markets, just over half (54%) say they worry about identifying the difference between what is real and fake on the internet when it comes to news, but people who say they mainly use social media as a source of news are more worried (61%) than people who don't use it at all (48%). Additionally, regions with the highest levels of concern – Africa and Latin America – correspond closely with high levels of social media news use. This is not to say that social media use causes misinformation, but that usage may generate awareness of and potential exposure to false information, including giving voice to extreme perspectives that previously would not have been widely heard.

When looking at the types of misinformation that people claim to see, we find that dubious health claims around COVID-19, including from anti-vaccination groups, are, as in 2021, still most widespread across most regions, ahead of politics. Notable exceptions are in Kenya – where political misinformation is more widely seen – as well as Colombia and the Philippines, both countries where elections were held this year.

PROPORTION WHO SAW FALSE OR MISLEADING INFORMATION ABOUT EACH TOPIC IN THE LAST WEEK – SELECTED REGIONS



Q. FAKE NEWS 2021a. Have you seen false or misleading information about any of the following topics, in the last week? Base: Total sample in each region: Europe = 48,836, North America = 40,448, Asia = 20,349, Latin America = 12,104, Africa = 6,057. Note: Africa average is Kenya, South Africa, and Nigeria only (English speakers in South Africa and Nigeria).

Levels of perceived misinformation around climate change and the environment are around three times higher in the United States (34%) than they are in Taiwan (10%) or Denmark (13%). Despite pledges to crack down, social media posts and videos denying climate change or disputing its causes remain widespread on Twitter, Facebook, YouTube, and TikTok, according to recent research.¹¹

In this year's report we find increased polarisation around climate change in a number of countries, including the United States, and identify the most important sources for climate change news with different groups.

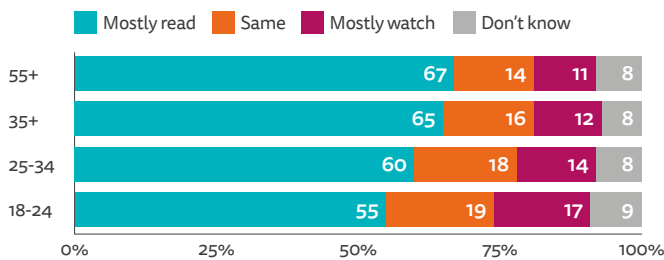
For further analysis see Section 2.6: How People Access and Think about Climate Change News

TEXT IS STILL KING BUT WHAT ROLE FOR ONLINE VIDEO?

Since the emergence of the internet, consumption on news websites (and apps) has primarily been about reading text articles. But that has begun to change with the growing supply of video news formats on social media.

Against this background, it is surprising to find that all age groups, on average, say they still prefer to read news online rather than watch it – and we have seen little change in underlying preferences since we last asked the question in 2019. Younger audiences, however, are significantly more likely to say they watch the news, perhaps because they are more exposed to networks like Facebook, Instagram, and TikTok.

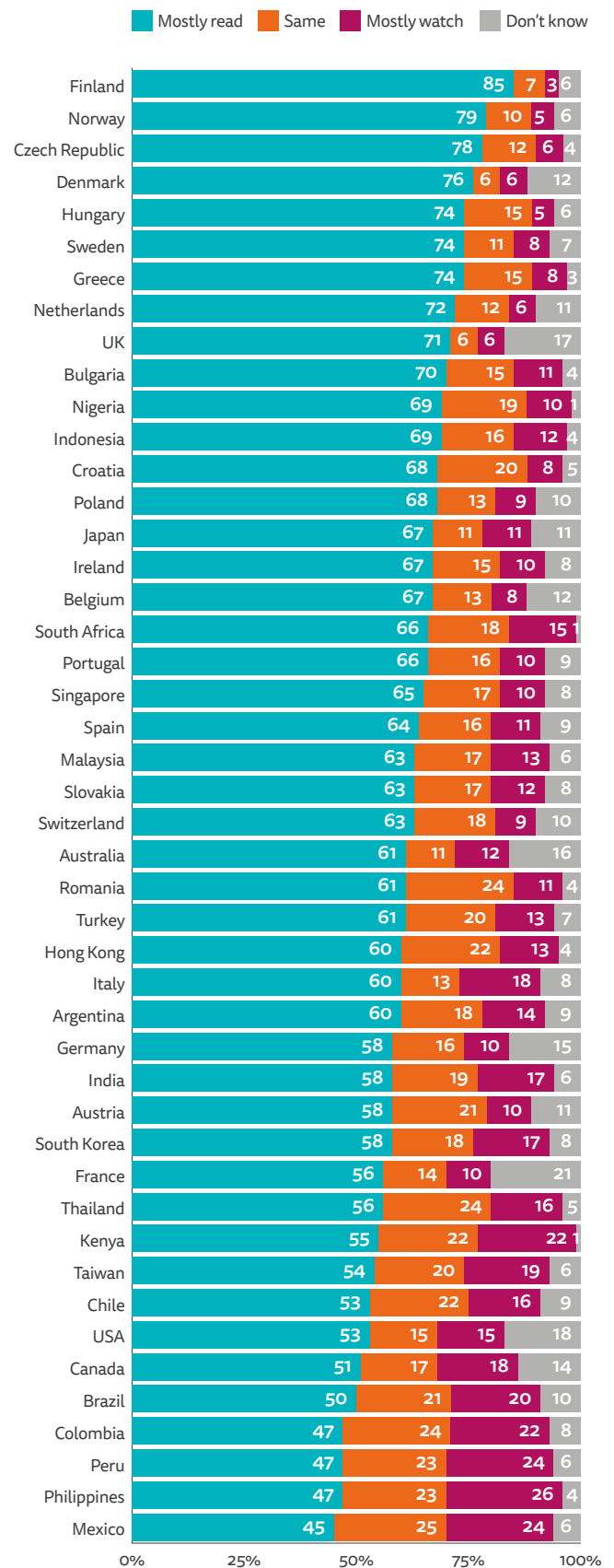
PROPORTION WHO MOSTLY READ NEWS IN TEXT – BY AGE – ALL MARKETS



OPTQ11D. In thinking about your online news habits, which of the following statements applies best to you? Base: Total sample; all markets = 93,432.

We do find significant market-level differences in preferences around reading or watching, partly conditioned by consumption patterns offline. We find markets with historic patterns of high newspaper consumption such as Finland and Japan near the top of the list in terms of reading preference, with low-newspaper-circulation countries like Thailand and Brazil near the bottom. But other factors are also likely to be at play. Higher use of social media in general in Latin America (Mexico, Peru, Colombia, and Chile) as well as in parts of Asia-Pacific (Philippines and Taiwan) may be encouraging more video news use in these markets.

PROPORTION WHO MOSTLY READ NEWS IN TEXT – ALL MARKETS

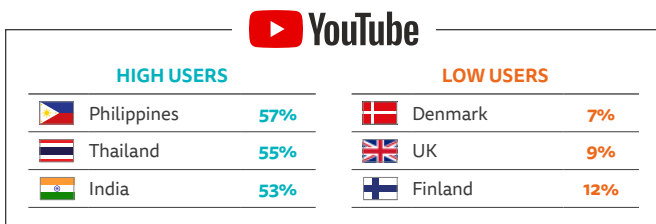


OPTQ11D. In thinking about your online news habits, which of the following statements applies best to you? Please select one. Showing net of different option statements. Base: Total sample in each market (n = 2000).

¹¹ <https://eu.usatoday.com/story/tech/2022/01/21/climate-change-misinformation-facebook-youtube-twitter/6594691001/>

These preferences are closely linked to video consumption through platforms such as YouTube, the most widely used video-based platform in our survey. We see extremely high levels of consumption in the Philippines and India, for example. Meanwhile, in Thailand, the combination of low data charges, and greater freedom to speak openly online, has led to a spate of independent TV-style shows that are widely consumed on mobile phones. In other countries such as the UK and Denmark, by contrast, there is comparatively little mainstream news consumed on YouTube, though some alternative or partisan channels and conspiracy theorists do have a presence.

PROPORTION THAT USED YOUTUBE FOR NEWS IN THE LAST WEEK – SELECTED MARKETS



Q12B. Which, if any, of the following have you used for news in the last week? Base: Total sample in each market (n = 2000).

Overall, respondents say they prefer reading online because it is quicker (50%) or gives them more control (34%). Around a third (35%) say they are put off by pre-roll ads that sometimes appear ahead of videos. Almost a fifth (17%) say videos don't add to anything that would otherwise be in a text story, 13% struggle with technical issues when trying to watch videos, and 8% worry about cost or data charges – much higher in African countries such as Kenya (35%) and Nigeria (35%).

MAIN REASONS WHY PEOPLE READ RATHER THAN WATCH ONLINE NEWS – ALL MARKETS



OptQ11a1. You say you prefer to read news in text rather than watch online video ... What are the main reasons for this? Base: All who prefer to read news. All markets = 59, 258.

I prefer to read, because it is quicker to open a website and get to know what I need.

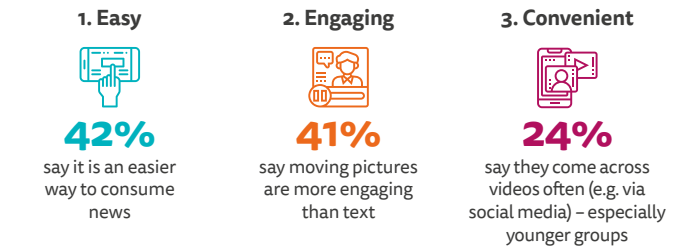
Male, 24, Brazil

I don't like videos that clearly don't NEED to be videos and just include random pictures and random highlighted words (that are already being said).

Female, 22, USA

By contrast, people who prefer to watch news online say that this is because they find it an easier (42%) and more engaging (41%) way to access the news. Some like to see the people making or reporting the news (20%), as it brings stories to life, while others say video tells a more complete story (29%), making it easier to follow. Finally, many prefer video because they are using social media anyway (24%) and it appears, conveniently, in their feeds.

MAIN REASONS WHY PEOPLE WATCH RATHER THAN READ ONLINE NEWS – ALL MARKETS

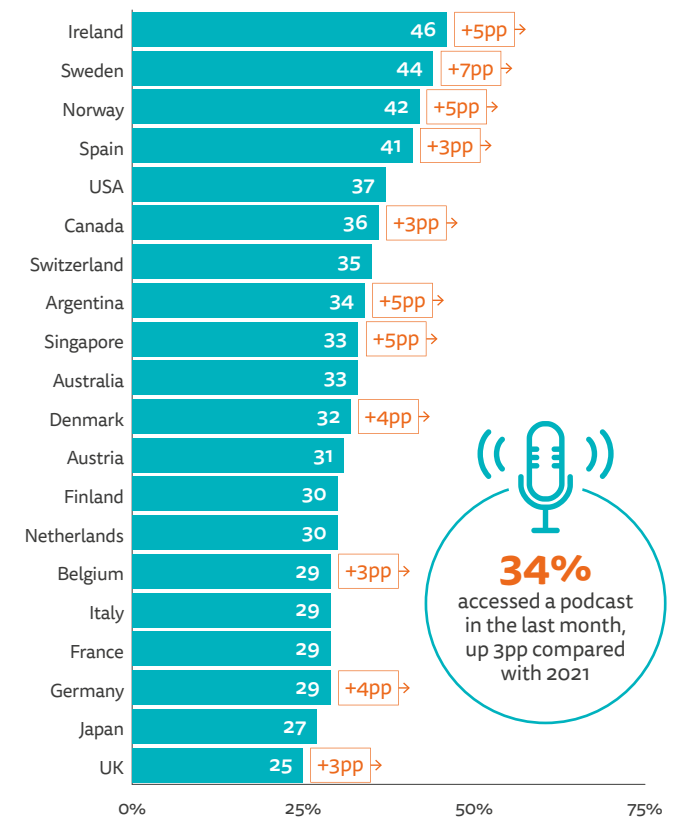


OptQ11b1. You say you prefer to watch news video rather than read it in text ... What are the main reasons for this? Base: All who prefer to watch news. All markets = 11,449.

Podcast usage growing again after COVID-19 pause

Podcasts have been another format that publishers have invested in heavily over the last few years (Newman and Gallo 2019 and 2020). Podcasts tend to reach younger audiences via their smartphones, and many subscription publishers are looking to use habit-building products, such as The Daily from the *New York Times*, to attract younger customers. Podcast growth has resumed this year in more than half of our markets after COVID-19 had disrupted the commute to work, negatively affecting news consumption. Looking at an average of 20 countries where we are confident that the term 'podcast' is well understood, we find 34% (+3) consumed one or more podcasts in the last month, with 12% accessing a news podcast. Ireland, a country with a strong audio tradition, heads our list, along with Sweden, the home of Spotify.

PROPORTION WHO USED A PODCAST IN THE LAST MONTH – SELECTED MARKETS



Q11F_2018. Which of the following types of podcast have you listened to in the last month? Base: Total sample in each market (n = 2000).

Platform mix is changing

Spotify, Amazon, and Google have been investing in podcasts over the last few years as they seek to capitalise on surging demand and break Apple's historic audio dominance. The battle for talent has intensified, as evidenced by Spotify's willingness to pay around \$200m for exclusive rights to the Joe Rogan podcast, and to stand by him after rows over controversial guests and accusations of spreading of false information.¹² In our qualitative research in both the UK and US, it was striking how many younger people regularly listen to The Joe Rogan Experience, even as they worry about some of the content.

I listen to Joe Rogan a lot but he's not a reliable news source. He's just some guy with a podcast.

Male, 23, USA

Spotify has continued to gain ground this year, overtaking BBC Sounds in the UK as the main podcast platform. It is also leading in Germany, but not in Spain, where YouTube is ahead and where the audio platform iVoox – which focuses on Spanish and Latin American markets – has a substantial share. In our qualitative research, we find some clues as to why these long news shows with diverse perspectives on Spotify and YouTube seem to appeal to young multitaskers.

[I listen to the] Joe Rogan podcast, Jordan Peterson podcast, YouTube videos on Fox, Tucker Carlson. They are entertaining and you can get other things done while listening to them.

Female, 23, USA

You can go on to the podcast section of Spotify, and they will tell you information about what's going on that day – [for example] loud explosions have been heard in Kharkiv, Ukraine. It's making information accessible to those that maybe would prefer not to read a lengthy article.

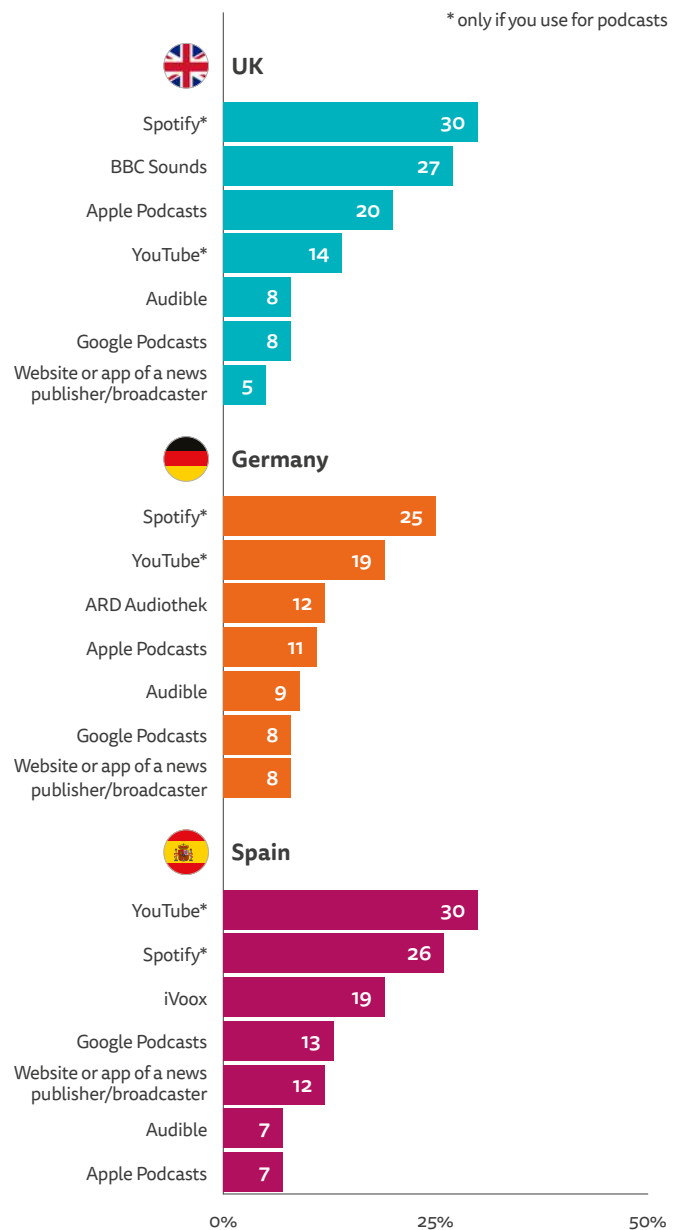
Female, 23, UK

YouTube is increasing its publisher focus on podcasting this year – partly to bring more reputable content onto the platform – and has revealed plans for a discovery hub and better monetisation and analytics.¹³

Big tech platforms are investing in content and bringing programming to a wider and more mainstream audience but this is also raising familiar questions for publishers about monetisation, distribution, and access to data. The *New York Times* is launching its own app for audio this year in a bid to build more direct traffic, while Schibsted in Norway and Prisa Media in Spain, the publishers of *El País*, have also been investing in podcast platforms to create more critical mass and ultimately more control.

Meanwhile, the wider shift to audio continues to be driven by new voice interfaces and devices such as smart speakers and in-car entertainment systems. Amazon and Google are the key market makers in this respect, though South Korea has its own set of device manufacturers. Smart speakers now reach almost a quarter of the UK adult population (24%), 17% in Canada and Korea, 15% in Germany, and 13% in the US. But news use remains disappointing: only a minority use these devices for any kind of news (6% in the UK and 4% in the US).

PROPORTION THAT MAINLY USE EACH PLATFORM FOR PODCASTS – SELECTED MARKETS



POD2. Which of the following apps or websites do you mainly use to find and play podcasts?
Base: All who listened to a podcast in the last month: UK = 613; Germany = 578; Spain = 863.

¹² 'Joe Rogan: Four Claims from his Spotify Podcast Fact-Checked'. <https://www.bbc.co.uk/news/60199614>

¹³ <https://podnews.net/update/youtube-podcasting-plans>

CONCLUSION

While some individual news media have clearly been very successful at building online reach or convincing people to subscribe, and developed new offers across podcast, video, and newsletters, this year's data show many publishers are still struggling to come to terms with structural changes that have been ravaging the industry for more than a decade. These challenges are compounded by the fraying connection that journalism and news media have with much of the public in many countries. More people are disconnected, interest in news is down, selective news avoidance up, and trust far from a given. The Ukraine crisis, and before it the COVID-19 pandemic, have reminded people of the value of accurate and fair reporting that gets as close to the truth as possible, but we also find evidence that the overwhelming and depressing nature of the news, feelings of powerlessness, and toxic online debates are turning many people away – temporarily or permanently. Paywalls and registration gates may not be helping either, putting further barriers in the way of the content that audiences want to consume, even as they are creating more sustainable businesses for some.

Although many publishers have had a relatively good year with increased revenue, future growth is likely to be challenged by the combined impact of inflation and rising energy prices, squeezing household budgets currently devoted to news media, but also potentially hitting advertising revenues, too. In this context, publishers will need to be even more focused on meeting the needs of specific audiences and demonstrating value to users. Internet users have access to an unprecedented amount of content, products, and services competing for their attention and hard-earned money, and news needs to stand out, connect, and create value, if it is to convince them to pay.

They will also need to keep an eye on the needs of the next generation, who this report has shown are exhibiting very different behaviours and attitudes than the one that went before. These *social natives*, who have come into adulthood in the last five or ten years, are much less likely to visit a traditional news website or to pay for online news – and they are often wary of giving up their data. Deeply networked, they are increasingly accessing news in video or audio on networks like Instagram, TikTok, YouTube, or Spotify.

The world feels increasingly uncertain, with war in Europe and a major refugee crisis adding to the impact of the pandemic, not to mention the looming threat of climate change. The need for reliable information, careful context, and considered debate has rarely been greater, but so too has the desire for stories that inspire and give hope of a better tomorrow. The global shocks of the last few years have galvanised publishers to refocus on digital, embracing new business models, storytelling, and distribution. But there will be no single route to success in this often confusing and increasingly complex media environment.

2



SECTION 2

Further Analysis and International Comparison

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2.1 Perceptions of Media Coverage of the War in Ukraine

Kirsten Eddy and Richard Fletcher

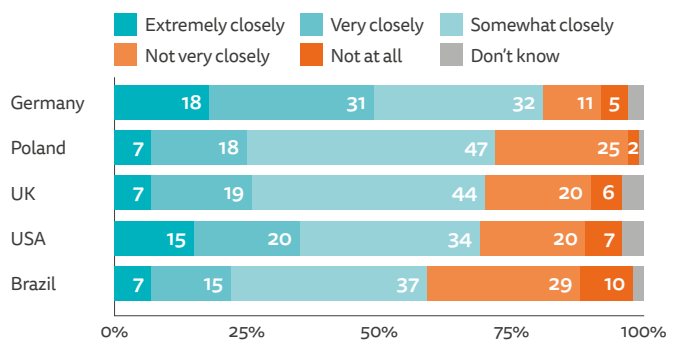
On 24 February, Russia launched a full-scale invasion of Ukraine, marking the start of the biggest war in Europe since the Second World War. Major news organisations around the world have embedded journalists in Ukraine to cover bombings and violence in hard-hit towns and cities across broadcast, digital, and print media. Journalists, civilians, and politicians – most notably Ukrainian President Volodymyr Zelensky – have also taken to social networks like TikTok, Telegram, and Twitter to document the horrors of the war for a global audience in real time. The humanitarian crisis unfolding in Ukraine, along with the scale of the Western response to Russia’s invasion, has far-reaching political and economic effects.

To better understand how people have been accessing news about the Russia–Ukraine conflict, and to explore the impact this might have on overall trends in attitudes and behaviours, we commissioned YouGov to carry out a separate follow-up survey in five countries: Brazil, Germany, Poland, the UK, and the US. These countries were selected because they represent different levels of proximity to the conflict, ranging from Poland, which borders Ukraine, to Brazil and the US, which are on different continents. Fieldwork took place from 29 March to 7 April 2022 – roughly one month after the invasion began. We polled around 1,000 respondents in each country and samples were assembled using the same quotas as the main survey. The questionnaire contained several new questions specifically about the Russia–Ukraine conflict, as well as a handful of key questions from the main Digital News Report survey on news interest, use, avoidance, and trust. This allows us to directly compare our ‘pre-conflict’ results from the main 2022 survey and the ‘during conflict’ follow-up survey. However, because the Russia-Ukraine conflict overlapped with other domestic news stories, not all changes we see will be a direct result of coverage of the conflict.

MOST PEOPLE ARE FOLLOWING THE CONFLICT CLOSELY

First, how much attention are people paying to news about the conflict? In all five countries, a majority are following the Russia–Ukraine conflict at least somewhat closely. Although the conflict has global consequences, attention is highest in Germany, which is both geographically close to the conflict and where the effects are already filtering down to the lives of ordinary people, for example, in terms of energy prices. In Brazil, which is politically and geographically farther from the conflict, around 40% are not following it closely.

PROPORTION WHO ARE FOLLOWING THE RUSSIA-UKRAINE CONFLICT CLOSELY – SELECTED MARKETS

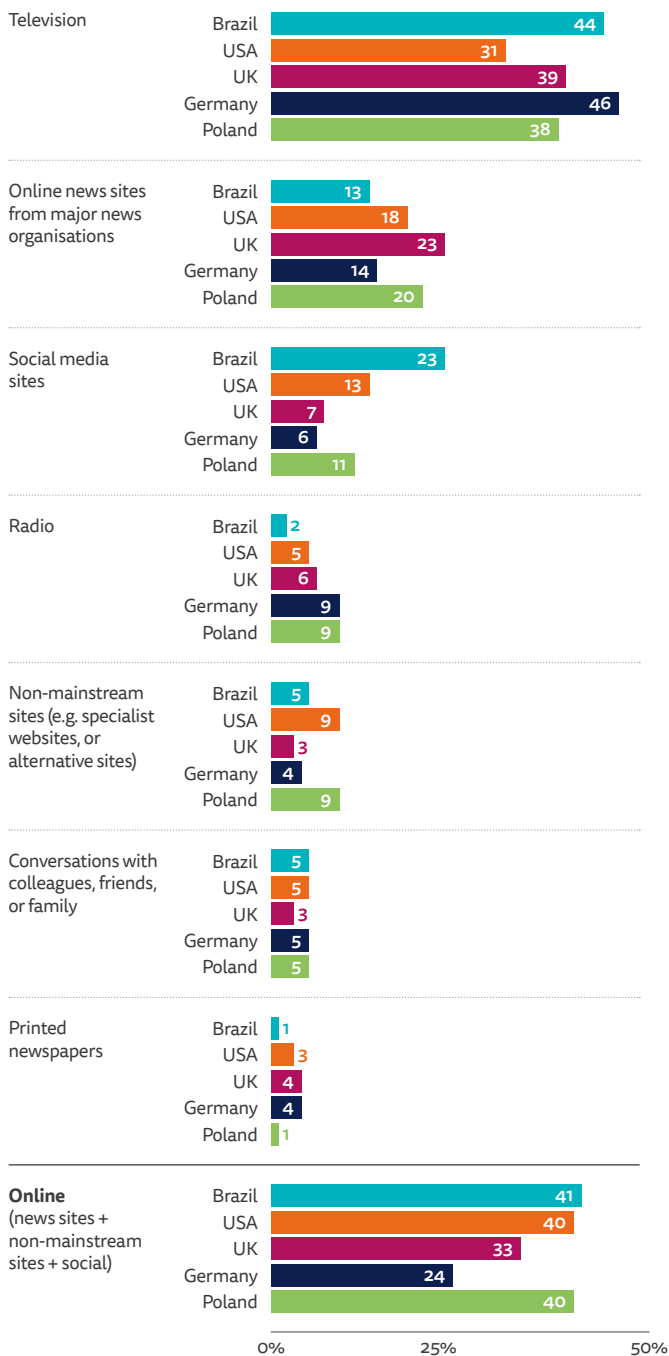


Q1_ukraine. How closely, if at all, are you following the current Russia–Ukraine conflict?
 Base: Total sample: Brazil = 1002, Germany = 1015, Poland = 1003, UK = 1191, USA = 1356.

Some of these findings are in line with earlier data on those who are not consuming any news sources at all in markets like the US and UK. But in countries like Brazil and Germany, the proportion of 18–24s not following the conflict at all is particularly high compared with other age groups. And in the US and UK, women are slightly more likely than men to not be paying close attention to the war.

As we have seen with other major world events, people turn more to TV news at times of crisis. When asking respondents which news source they are paying the most attention to when it comes to the Russia-Ukraine conflict, television tops the list for three of the five countries – with the most attention to TV news on the conflict spread out geographically, from Germany (46%) and Brazil (44%). In the US and Poland, online news sites, non-mainstream sites, and social media combined account for a larger share – but TV is still the most widely used individual source for news about the conflict.

PROPORTION WHO PAY MOST ATTENTION TO EACH SOURCE FOR NEWS ABOUT THE RUSSIA-UKRAINE CONFLICT – SELECTED MARKETS



Q2_ukraine. When it comes to the current Russia-Ukraine conflict, which ONE of the following sources of news, if any, are you paying most attention to? Base: Total sample: Brazil = 1002, Germany = 1015, Poland = 1003, UK = 1191, USA = 1356.

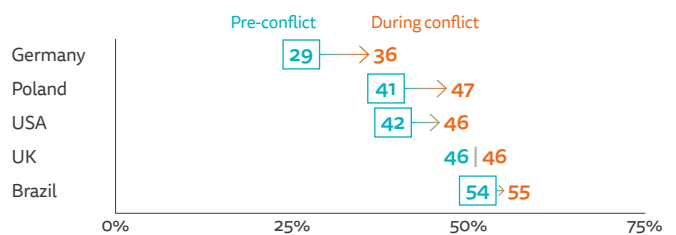
We see some differences in preferred sources by both age and market. For instance, the same splits we see in TV versus social media use between younger and older cohorts also applies to the most important platform for following the Russia-Ukraine conflict. In the UK, for instance, more than half (55%) of those 55 or older, but only 13% of 18-24s, are paying the most attention to TV news on the Russia-Ukraine conflict. And nearly eight times as many 18-24s (15%) are paying the most attention to social media news on the war as those 55 and older (2%). Further, while TV is especially dominant for information about the conflict in countries like Germany, social media are a particularly important source in Brazil, with 23% of people paying the most attention to these platforms for related information.

HOW HAS THE CONFLICT INFLUENCED PEOPLE'S NEWS BEHAVIOURS AND ATTITUDES?

We also used this follow-up survey to explore whether the trends we described in the Executive Summary – namely, decreases in news use and interest and increases in news avoidance – were reversed by the extensive coverage of the Russia-Ukraine conflict. We did this by repeating the same key questions (albeit to a different sample of respondents) and looking for differences between the 'pre-conflict' sample from the main 2022 survey and the 'during conflict' follow-up survey. Of course, we need to be cautious about attributing all changes to coverage of the conflict. Major domestic stories – such as the 'Partygate' scandal in the UK – were unfolding in parallel, and these may also have influenced people's attitudes and behaviours around news.

In general, we find little evidence that these long-term trends have been reversed – even temporarily – and in some cases there's possible evidence that they have been accelerated. The clearest example of this is news avoidance. In Germany, Poland, and the US, the proportion who say they sometimes or often actively avoid the news has increased. The biggest increase of all was in Germany (+7pp), but significant increases can also be seen in Poland (+6pp) and the US (+4pp). To put some of these changes in context, the increase of 7pp in Germany in just two months is larger than the 5pp increase we saw in the five years from 2017 to 2022. We know that one of the main reasons people avoid the news is because of the negative effect it has on their mood, so it would be unsurprising if the deeply depressing and concerning nature of conflict has caused more people to turn away from it. In the UK and Brazil, where news avoidance was already high, we do not see evidence of a further increase – but it is equally important to note that it has not decreased either. Furthermore, in these two countries, news avoidance has already increased markedly in recent years – by 11pp from 2019 to 2022 in the case of the UK, and by 20pp in Brazil.

PROPORTION WHO SOMETIMES OR OFTEN ACTIVELY AVOID THE NEWS – SELECTED MARKETS



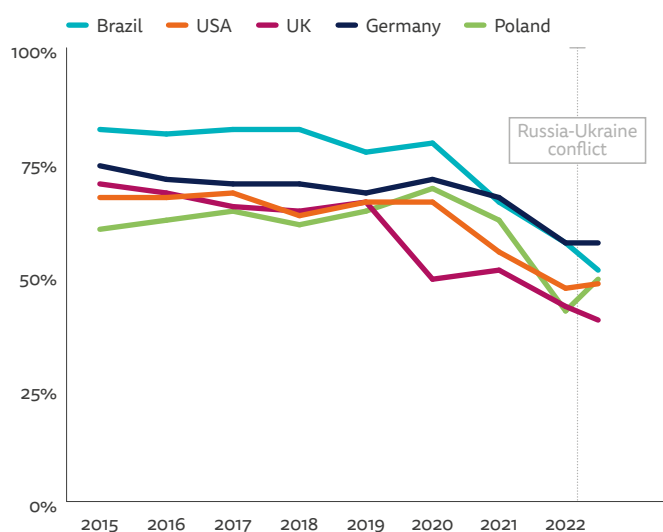
Q1di 2017. Do you find yourself actively trying to avoid news these days? Base: Total pre/during-conflict samples: Brazil = 2022/1002, Germany = 2002/1015, Poland = 2009/1003, UK = 2410/1191, USA = 2036/1356. Note: Pre-conflict sample from the main 2022 DNR survey. During-conflict sample from 29 March to 7 April.

Despite the increase in news avoidance, the proportion who say they access news several times a day increased in Poland by 6pp. This highlights that news avoidance and news use are not mutually exclusive, and that people can make a conscious decision to moderate their news use – or perhaps coverage on specific topics – while still regularly checking in. In Poland, around 40% of people who accessed news several times a day during the conflict also say they sometimes or often actively avoid the news. The proportion who accessed the news several times a day fell by 6pp in Brazil and 4pp in Germany, and remained stable elsewhere.

In Poland and Germany, closest to the conflict, TV use for news *in general* is also up from before the conflict (3pp for Germany and 9pp for Poland). Use of social media for news in general remains even or is down across all countries – in Germany, for instance, by as much as 7pp for social media – perhaps because people are seeking out professional coverage or want to step back from continuous updates. But in general, it is difficult to draw any firm conclusions about the effect of the Russia–Ukraine crisis on frequency of news access, especially as the polling took place several weeks after the invasion began.

Looking instead at interest levels in news, we again see the biggest change in Poland – a 7pp increase from pre-conflict levels. However, because declines in news interest have been so steep since 2020, this increase only represents a return to 2021 levels. Elsewhere, interest has either been unaffected, or – as in Brazil (-6pp) – continues to fall. Despite its severity, the Russia–Ukraine conflict has done little to reverse declining levels of interest in most countries, even in the short term. We see a similar picture when we look at levels of trust in news. Despite the bravery of journalists on the ground in Ukraine and the remarkable reporting they have produced, trust in news has not been affected – aside from a 4pp increase in the UK.

PROPORTION VERY OR EXTREMELY INTERESTED IN NEWS (2015–2022) – SELECTED MARKETS

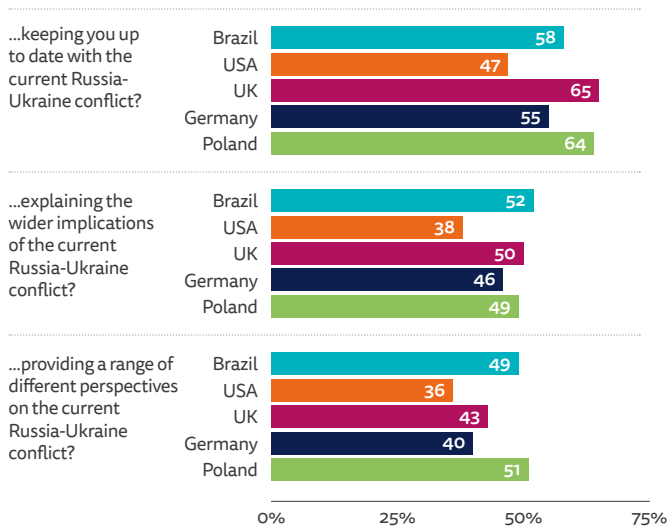


Q1c. How interested, if at all, would you say you are in news? Base: Total 2015–22 samples (n = 2000). Total during-conflict sample (n = 1000).

HOW DO PEOPLE FEEL ABOUT THE NEWS MEDIA'S COVERAGE OF THE CONFLICT?

Finally, we wanted to gauge how people feel about the media’s performance covering the Russia–Ukraine conflict. To do this, we asked people to rate how well the news media have done keeping people up to date, explaining the wider implications, and providing a range of different perspectives on the conflict. The news media are broadly seen to be doing a good job with coverage, especially on keeping people up to date on the latest news – with nearly half or more of respondents in all five countries agreeing the media have done a good job with this. But in general, they feel the media have not performed quite as well for explaining the wider implications of the conflict or providing a different range of perspectives on it – clearly illustrating, across all five countries, where news organisations could be doing a better job as the crisis continues to unfold. In general, people in the older age groups, and those with more formal education, tend to rate all aspects of the coverage more favourably.

PROPORTION WHO THINK THE NEWS MEDIA HAVE DONE A GOOD JOB OF EACH – SELECTED MARKETS



Q3_ukraine. Do you think the news media in your country have done a good job or a bad job ... Base: Total sample: Brazil = 1002, Germany = 1015, Poland = 1003, UK = 1191, USA = 1356.

CONCLUSIONS

In the wake of thousands of deaths and the displacement of more than six million Ukrainian refugees¹⁴ – and with Russia now being accused by the international community of widespread human rights violations – the war in Ukraine continues to attract global attention. Across the five countries we study here, a majority are following the conflict at least somewhat closely, especially those nearest to it.

As we’ve seen with other major world events, many people are turning to television news for the latest information on the conflict – illustrating the continuing resonance of broadcast media in times of crisis. This may not be surprising, particularly given concerns about false or misleading information circulating on social media platforms. But in some countries, such as the US and Poland, attention to news from online sources (including mainstream and alternative news sites as well as social media) is also high.

¹⁴ <https://data2.unhcr.org/en/situations/ukraine/location?secret=unhcrrestricted>

Possibly given the difficult and at times traumatic nature of war coverage, we see some evidence of accelerating news avoidance across several countries – for instance, up 7pp in Germany. And while short-term news behaviours and attitudes have appeared to change in Poland – with increased news use and interest in the country closest to the conflict – even a story as newsworthy and significant as the war in Ukraine has not reversed declining levels of news interest in most countries.

As the conflict persists, it will be especially important for newsrooms to refocus efforts around explaining its wider implications. Given our findings this year on the percentage of younger and less educated news audiences finding the news hard to understand, as we discuss in the Executive Summary, clear ‘explainers’ and contextualisation of the Russia–Ukraine conflict – both what it means for those most affected by the war in and around Ukraine, as well as its broader implications for global audiences – may draw in a segment of news avoiders who simply want clearer, more relevant information. People largely do not feel as positively about news organisations providing a different range of perspectives on the conflict. However, as the invasion continues, and as new atrocities occur daily, providing alternative perspectives is unlikely to be seen by journalists as the most pressing task.

2.2 Have News Audiences Become More Polarised over Time?

Richard Fletcher

Divisive political moments create a sense that we live in a time of heightened political polarisation. And partisan news media – combined with people’s well-documented preference for news outlets that share their political views – are often blamed for driving people further apart, leaving each of us with fundamentally different ideas about the key issues in society.

Implicit in this narrative is the notion, first, that everyone has a strong and exclusive preference for news outlets they agree with; second, that such preferences are intensifying over time; and third, that this process is mirrored across different countries and media systems.

The data we present in this chapter challenge all three of these assumptions. By mapping the degree of news audience polarisation in different countries, we show that polarisation is generally low because most news outlets attract mixed and/or centrist audiences, that there are large differences in news audience polarisation by country, and that levels of news audience polarisation have changed little since 2016. At the same time, we also see that the audience profile of some individual outlets has changed markedly and that national patterns of polarisation to some extent map onto how audiences themselves see the media landscape in their country.

HOW WE MEASURE NEWS AUDIENCE POLARISATION

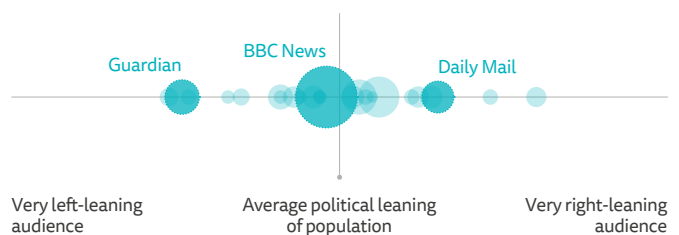
The approach we use to map news audience polarisation builds on work we first introduced in the 2017 *Digital News Report*, with the specific method described in a peer-reviewed academic journal article (Fletcher et al. 2020). In short, we compare the left–right make-up of each news outlet’s combined online and offline audience to the left–right make-up of the national population, allowing us to see whether each outlet’s audience skews left or skews right from the population average, and by how much.

Using this measure, a score of -0.50 indicates that an outlet has an audience entirely made up of people who self-identify with the political left, 0.50 indicates an audience entirely made up of people on the right, and 0 an audience that matches the population (outlet scores are available on our website). Then, in each country, we plot the audience for every outlet onto a single map, creating an audience-centric overview of the national media landscape. Finally, the level of news audience polarisation in each country is the average distance between outlet audiences (computed using the standard deviation), weighted by audience size so that larger outlets count for more.¹⁵

NEWS AUDIENCE POLARISATION TODAY

We can start by mapping news audience polarisation based on our most recent data from 2022. In the UK, as we have seen before, some newspaper outlets like the *Guardian* have a more left-leaning audience compared to the national population, whereas others – like the *Daily Mail* – have an audience that skews right. The largest bubble on the map, which represents the audience for BBC News, is much closer to the mid-point, indicating a mixed and/or centrist audience that closely resembles the political make-up of the UK as a whole.

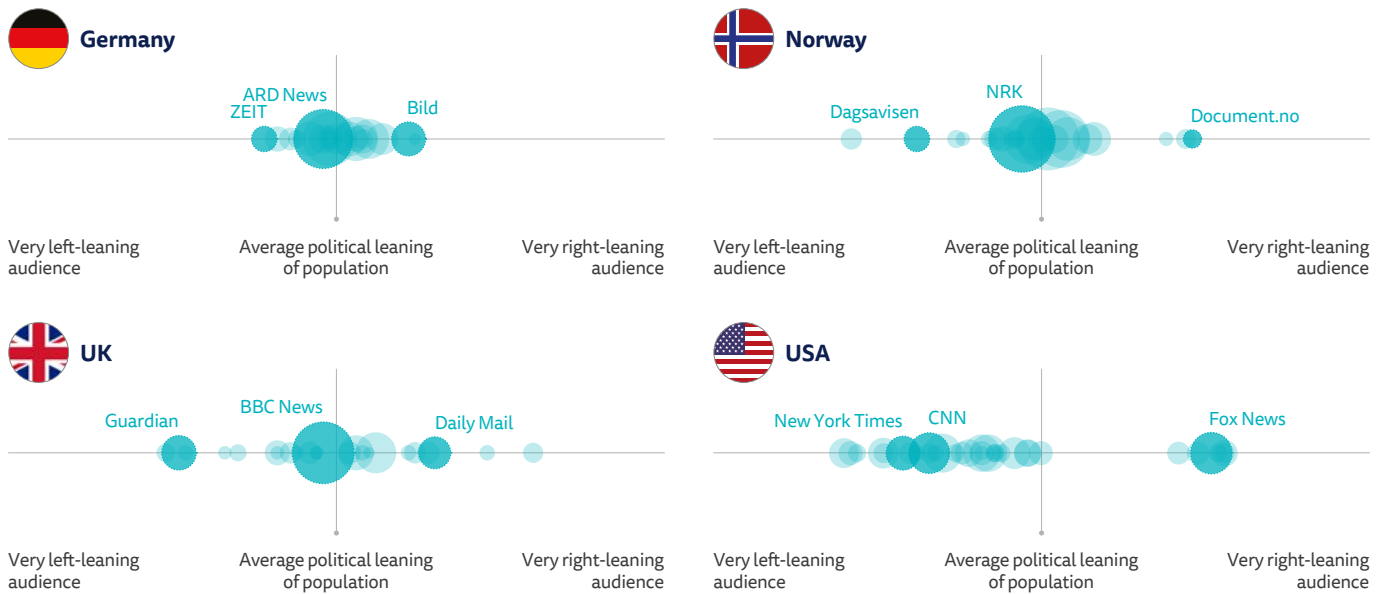
CROSS-PLATFORM NEWS AUDIENCE POLARISATION – UK



Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q5A/B.** Which of the following brands have you used to access news offline/online in the last week? Base: 2410.

¹⁵ For more precise details on how news audience polarisation is computed see Fletcher et al. 2020. Note: Analysis was performed on unweighted data.

CROSS-PLATFORM NEWS AUDIENCE POLARISATION – SELECTED COUNTRIES



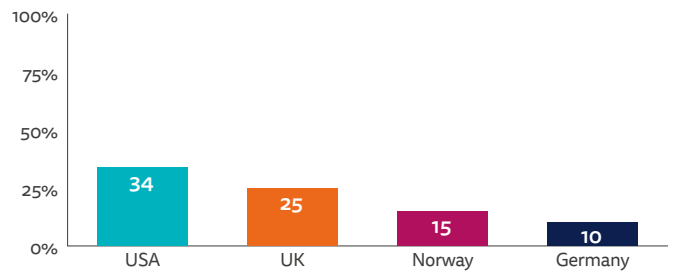
Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q5A/B.** Which of the following brands have you used to access news offline/online in the last week? Base: Germany = 2002, Norway = 2010, UK = 2410, USA = 2036.

NEWS AUDIENCE POLARISATION VARIES BY COUNTRY

The UK has a relatively high level of news audience polarisation. The spread of the bubbles in the chart above shows that news audience polarisation is higher than in Norway and Germany, but lower than in the USA where there is no large outlet in the middle of the map, highlighting the importance of public service media as a central anchor in much of Europe (though local news media, which we do not plot here, may partly fulfil this role in the USA). News audiences are less polarised in Norway, but while most traditional newspaper and broadcast brands have mixed and/or centrist audiences, they have recently been joined by several partisan/alternative brands – like Document.no and HRS – that have audiences with a stronger political skew – occupying space further from the centre of the map. In Germany, although some new digital-born brands have emerged in recent years, audiences for most outlets are predominantly centrist. This is partly because fewer people self-identify with either the left or the right in Germany, precluding very high levels of news audience polarisation along this dimension (though, of course, both the public and news audiences may be polarised along different dimensions).

We can compute a news audience polarisation score for each country – based on the standard deviation of outlet audiences, weighted by their size – that reflects the degree to which polarisation approaches a theoretical maximum, where only outlets with an entirely left-leaning and entirely right-leaning audiences exist, with nothing in between. This allows us to more easily compare across countries, but it also highlights that in most countries news audience polarisation is low. In Germany, for example, polarisation is just 10% of what it could be, and even in the USA (34%), polarisation is far from the theoretical limit.

EXTENT OF CROSS-PLATFORM NEWS AUDIENCE POLARISATION – SELECTED COUNTRIES



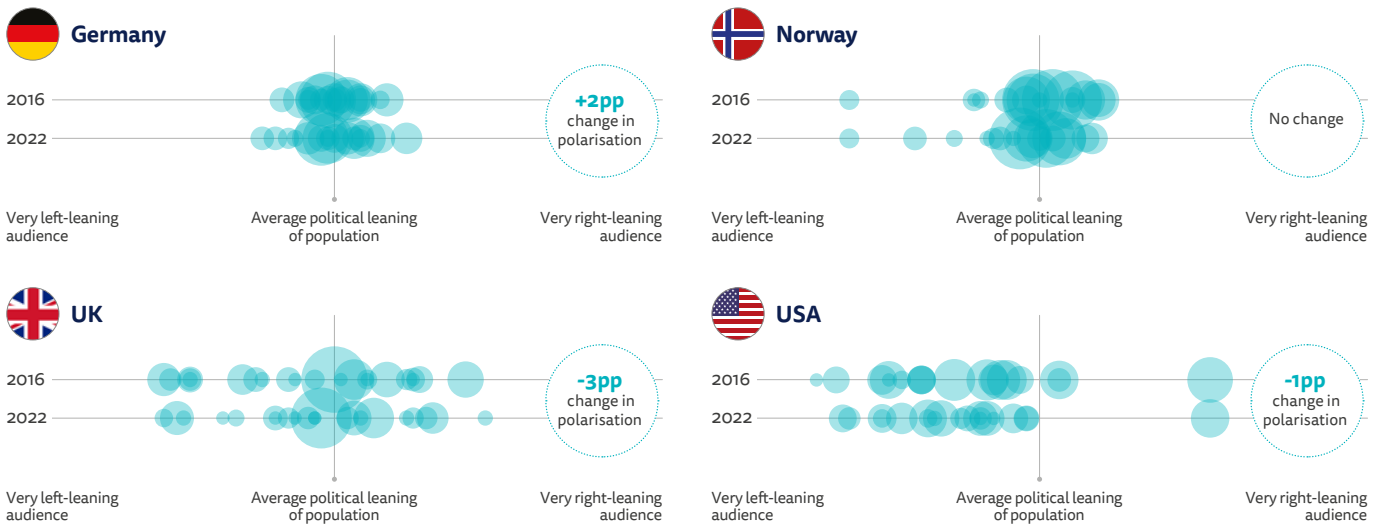
Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q5A/B.** Which of the following brands have you used to access news offline/online in the last week? Base: Germany = 2002, Norway = 2010, UK = 2410, USA = 2036.

IS NEWS AUDIENCE POLARISATION ON THE RISE?

To explore whether news audience polarisation is growing, we can compare the most recent data with those from 2016 – the first point at which we started asking respondents whether they self-identify politically with the left or the right outside of the UK and the USA.

At least in the four countries we focus on here, news audience polarisation has not increased substantially – if at all – in the last six years. The most striking aspect of the maps is how little they have changed over time. Across all four countries, news audience polarisation has changed by 3pp or less since 2016, indicating only minimal shifts in audience behaviour.

CROSS-PLATFORM NEWS AUDIENCE POLARISATION (2016 AND 2022) – SELECTED COUNTRIES



Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? Q5A/B. Which of the following brands have you used to access news offline/online in the last week? Base: 2016/2022: Germany = 2002/2035, Norway = 2019/2010, UK = 2024/2410, USA = 2197/2036.

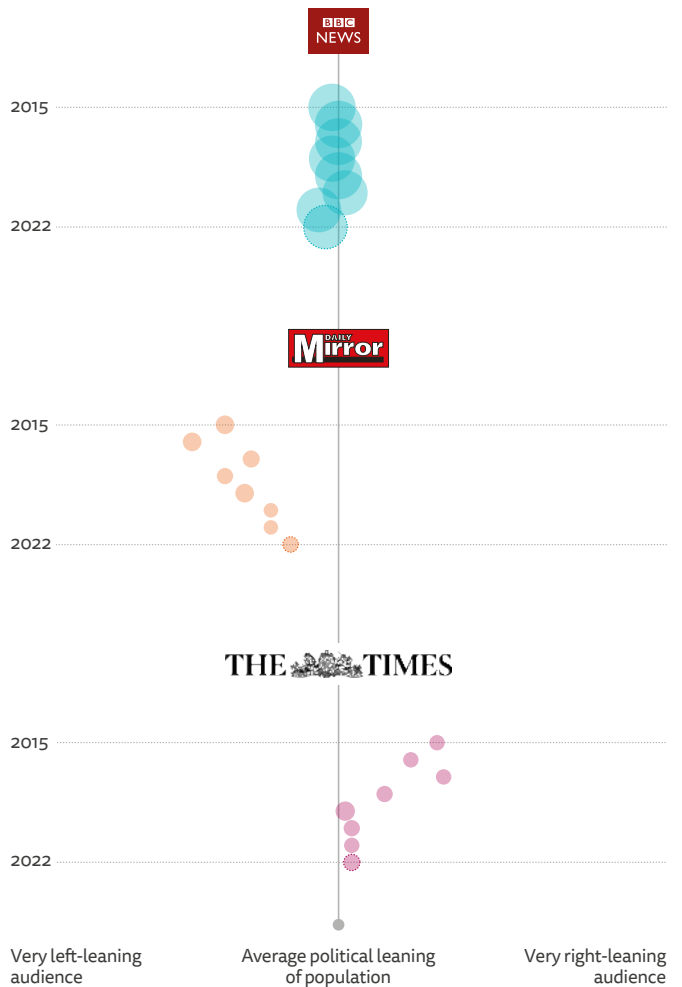
These figures are derived from maps that only include outlets asked about in both the 2016 and 2022 surveys, but much of the time this will not accurately reflect the emergence of newer, and often more partisan, digital-born brands (or the closure of legacy brands, though this is less common). If we include these, the numbers change slightly, but the difference between 2016 and 2022 remains 4pp or less – a difference that could just as easily be the result of random noise as real change in audience polarisation. It seems, then, that patterns of news audience polarisation are stable (at least in the short term), and the emergence of partisan digital-born brands has minimal effect due to the small sizes of their audience.

THE CHANGING AUDIENCE FOR DIFFERENT OUTLETS

If we take a closer look at what is happening within each country, we can observe some interesting shifts in the audiences for individual outlets. For example, in the UK, while BBC News has maintained its large mixed/centrist audience, the audience for the *Mirror* has become significantly less left-leaning over time. Similarly, the audience for *The Times* has become less right-leaning. At the same time, the audiences for other outlets have become more partisan – and as has already been mentioned, new partisan/alternative brands like GB News have entered the market – meaning news audience polarisation has remained quite stable in the aggregate.

It is not possible to use the data to say for certain what's behind these shifts, and the reasons are likely to vary for each outlet. The audience profile for some outlets may have changed due to the ongoing shift away from offline consumption to online access. This may be particularly important for outlets that reach more people via platforms like Facebook and Google, where processes like incidental exposure – where people are shown news articles when they are using the platform for other reasons – and automated serendipity – where algorithms surface news from outlets people wouldn't normally use – render partisan selective exposure less important. Paywalls could also have an effect if the profile of those willing to pay is different from the typical audience. And, of course, some outlets may have made a conscious decision to adjust their editorial line, meaning that they attract a different user base.

CROSS-PLATFORM AUDIENCE SLANT FOR SELECTED OUTLETS (2015-2022) – UK

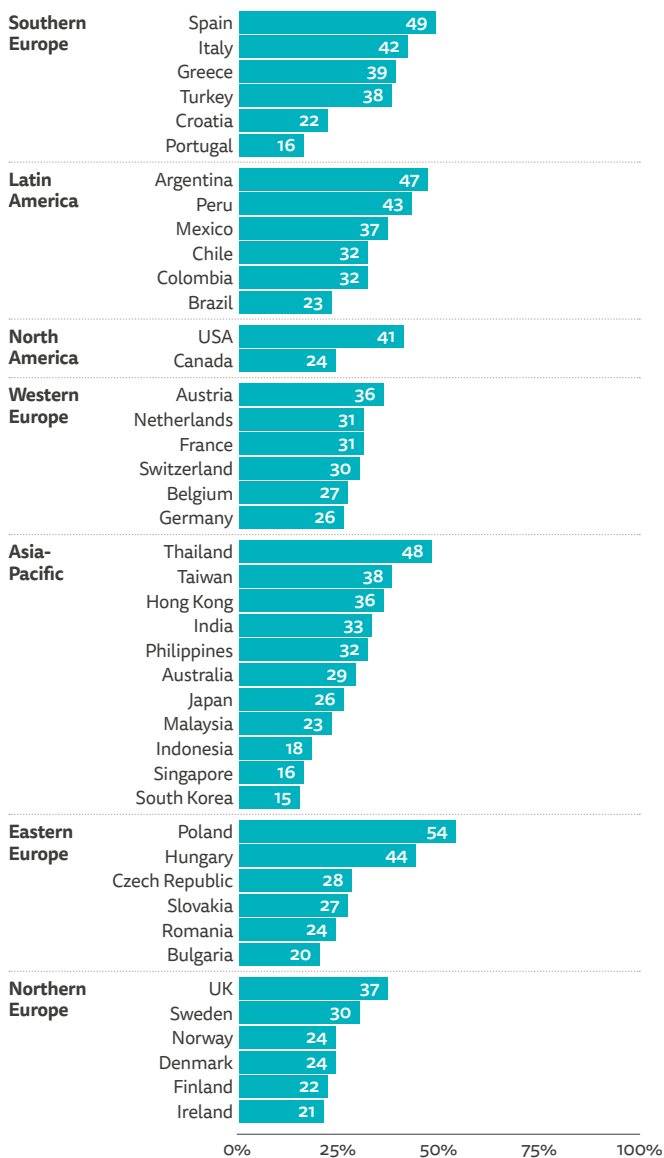


Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? Q5A/B. Which of the following brands have you used to access news offline/online in the last week? Base: Total 2015-22 samples (n= 2000).

PERCEPTIONS OF NEWS OUTLET POLARISATION

To complement our data on news audience behaviour, we also asked a new question this year on the extent to which people perceive the news landscape in their country to be polarised. Perceived polarisation is an established concept in political science, referring to the extent to which people believe political groups or parties to be different from one another – regardless of the actual similarities or differences in their policies. As such, we asked respondents: 'In your view, how politically close together or far apart are the main news organisations in your country?' with response options ranging from 'Very far apart' to 'Very close together'. It is important to keep in mind that polarisation (which is normally seen as bad) shares some qualities (e.g., absence of homogeneity) with concepts like diversity and plurality (which are normally thought of as good). However, given that these typically refer to the extent to which all views are represented equally rather than the distance between groups, the question wording gets us closer to polarisation.

PROPORTION WHO THINK NEWS ORGANISATIONS IN THEIR MARKET ARE POLITICALLY FAR APART – SELECTED MARKETS



Q Polarisation. In your view, how politically close together or far apart are the main news organisations in your country? Base: Total sample in each market (n = 2000).

Perceived news outlet polarisation is highest in Poland (54%), Spain (49%), Thailand (48%), and Argentina (47%) where around half think that the main news organisations are politically quite far apart or very far apart. The lowest figures are in South Korea (15%), Portugal (16%), and Singapore (16%). At the regional level, perceived polarisation is, on average, lower in Northern Europe but higher in Southern Europe and Latin America.

To some extent, these patterns map onto what we might expect based on rules about impartiality, levels of press freedom, and political parallelism – the degree to which the media outlets map onto political parties. And at least in the four countries we focus on in this chapter, levels of news audience polarisation match levels of perceived polarisation, with people in the UK and the US perceiving more polarisation than those in Germany and Norway. But there are also many reasons to expect people's perceptions to diverge from our expectations. For example, we might infer from the hostile media phenomenon that people who believe the media to be biased against people like them might see news organisations as 'all the same' and thus close together – even if the media landscape itself is polarised. At the same time, people may believe there is more polarisation than there is because this is a narrative which has been reinforced by politicians and the media. In this sense, perceived polarisation is similar to trust in the news, whereby perceptions of trust and actual trustworthiness may be quite different, but people's perceptions are nonetheless important to understand because they can have real consequences.

CONCLUSIONS

In this chapter we have described how, perhaps contrary to expectations, news audience polarisation is often relatively low (especially outside of the USA), is broadly stable over time, and varies significantly by country. In many countries, new partisan/alternative brands have entered the market, but because their audiences are typically small and because most people still gravitate towards established outlets, their influence on aggregate patterns of audience behaviour is minimal – and in some cases is offset by increasingly mixed/centrist audiences for larger brands.

At the same time, we have seen how audiences for some individual outlets can change, even in a relatively short space of time. News organisations, many of which have become more audience-focused in recent years, may find it useful to monitor the changing left-right profile of their audience, but this is just one of many possible dimensions along which they can map their users – both political and non-political. The challenge is identifying the most useful, and thinking through how audience profile relates to business and editorial strategy and the changing ways people arrive at and access news – and where this leaves them positioned in the national news landscape.

Stepping back, the overall picture we describe may offer some reassurance to those worried about the effects of digital media on society. But it is important to also keep in mind that, although patterns of audience behaviour may appear stable in the short term, the pattern over several decades may be very different. Furthermore, stability at the level of the mass public can also mask increasing polarisation among partisans. All this aside, even if audience behaviour changes little, news content from the same outlets may simultaneously be more partisan. And although smaller, more partisan outlets may have minimal direct reach, they may still exert indirect influence on political elites and media coverage. Audience behaviour certainly matters, but it is only one piece of a much larger puzzle.

2.3 The Changing News Habits and Attitudes of Younger Audiences

Kirsten Eddy

In 2019, the *Digital News Report* looked at how young people get their news,¹⁶ finding stark differences in news consumption and behaviours among younger people, including a greater reliance on digital and social media and a weaker identification with and loyalty to news brands compared with older groups. Three years later, we now turn our attention to how young people's news habits and attitudes have changed amid rising concerns about news distrust and avoidance, increasing public attention to social issues such as climate change and social justice, and the growth of newer platforms such as TikTok and Telegram.

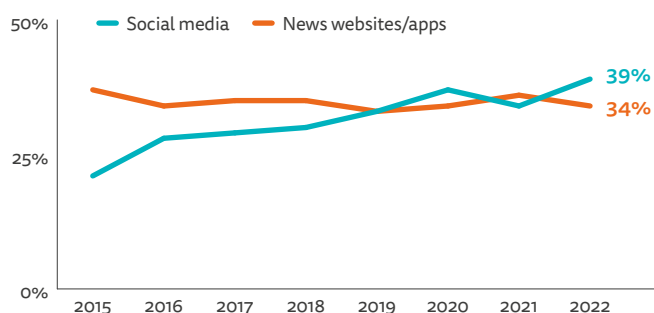
Here, we aim to unpack these new behaviours as well as to dismantle some broad narratives of 'young people'. Instead, we consider how *social natives* (18–24s) – who largely grew up in the world of the social, participatory web – differ meaningfully from *digital natives* (25–34s) – who largely grew up in the information age but before the rise of social networks – when it comes to news access, formats, and attitudes.¹⁷ These groups are critical audiences for publishers and journalists around the world, and for the sustainability of the news, but are increasingly hard to reach and may require different strategies to engage them.

In this chapter, we supplement our survey data with quotes drawn from qualitative research conducted by the market research agency Craft with 72 young people (aged 18–30) in Brazil, the UK, and the US.¹⁸

THE ROLE OF SOCIAL MEDIA IN YOUNG PEOPLE'S NEWS BEHAVIOURS

Since the *Digital News Report* began tracking respondents' main source of news, social networks have steadily replaced news websites as a primary source for younger audiences overall, with 39% of social natives (18–24s) across 12 markets now using social media as their main source of news, compared with 34% who prefer to go direct to a news website or app. We also find that social natives are far more likely to access news using 'side-door' sources such as social media, aggregator sites, and search engines than older groups.

PROPORTION OF 18–24s WHO SAY EACH IS THEIR MAIN SOURCE OF NEWS – AVERAGE OF 12 MARKETS



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news? Base: 18–24s from 2015–22 in selected markets (n = 200). Note: The 12 markets included are UK, USA, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Australia, Brazil, and Japan.

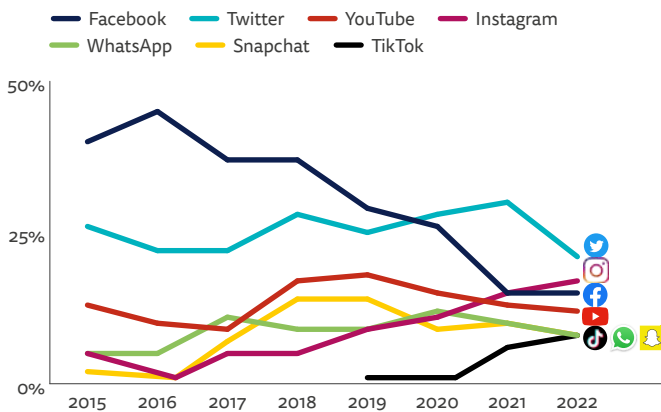
The social media landscape continues to evolve dramatically, with new social networks like TikTok entering the field as well as existing platforms like Instagram and Telegram gaining markedly in popularity among young audiences. As social natives shift their attention away from Facebook (or in many cases never really start using it), more visually focused platforms such as Instagram, TikTok, and YouTube have become increasingly popular for news among this group. Use of TikTok for news has increased *fivefold* among 18–24s across all markets over just three years, from 3% in 2020 to 15% in 2022, while YouTube is increasingly popular among young people in Eastern Europe, Asia-Pacific, and Latin America.

¹⁶ <https://www.digitalnewsreport.org/survey/2019/how-younger-generations-consume-news-differently/>

¹⁷ Because these age ranges are not entirely representative of the generational cohorts of 'Gen Y' and 'Gen Z', there is no clear consensus on what year of birth separates the two generations, and to avoid broad generational claims, we instead distinguish digital natives (25–34s) from social natives (18–24s).

¹⁸ This work included digital tasks, blogging, and vlogging, and in-depth interviews with 24 participants per country in February–March 2022. Participants represented a range of demographic traits, life stages, and news habits.

PROPORTION OF 18-24s WHO USED EACH SOCIAL NETWORK FOR NEWS IN THE PAST WEEK – UK



Q12B. Which, if any, of the following have you used for news in the last week? Base: 18-24s from 2015-22 (n = 200).

And while 25-34s have largely embraced many of the same networks as social natives in their daily lives and news habits, they have remained much more loyal to Facebook (9pp higher for news than social natives) – the network this cohort largely grew up with – and have been slower to move to new networks like TikTok (5pp lower for news than social natives).

What makes these networks so appealing to some younger audiences? Qualitative interviews reveal that they are drawn to the informal, entertaining style of visual media (and particularly online video) platforms – describing it as more personalised and diverse than TV, as a resource for rapidly changing events such as the Russia-Ukraine conflict, and as a venue for niche interests, from pop culture to travel to health and well-being.

On TV we always see the same things, but on YouTube, Spotify, TikTok, we have a range of diversity. ... We can get all this and see that there is diversity, society far beyond just what we live.

Male, 18, Brazil

A TV reporter who also has a TikTok page gives us regular updates ... feels comforting and more intimate than watching on TV news.

Female, 22, UK

I find [YouTube] more digestible than mainstream media. I also find YouTube to be more interesting because it is more specifically geared towards me.

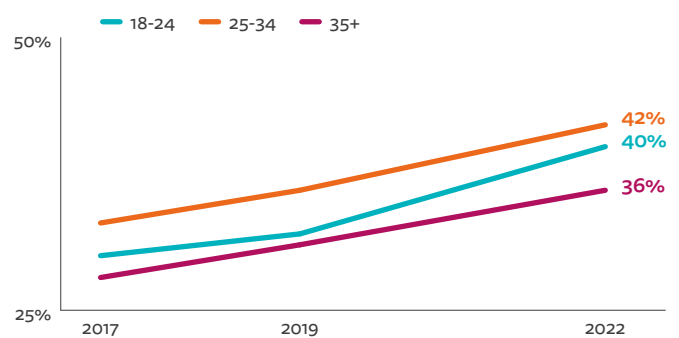
Male, 23, USA

However, the popularity of online video does not mean text- and audio-based formats don't still have a big role to play in young people's news habits. Under 35s still largely say they prefer to mostly read (58%) rather than mostly watch (15%) news – particularly, as our qualitative research finds, when looking for live updates and summaries or when keeping up with what is happening on a 'need to know' basis. Some say they seek out a mix of text and video content to better understand information. Others, particularly in Asia-Pacific and Latin American markets, are drawn to audio-based formats like podcasts that allow users to multitask while they listen. There is not a one-size-fits-all approach or medium through which newsrooms can attract younger audiences.

WHY YOUNGER AUDIENCES AVOID NEWS

And yet, as more news outlets and formats compete for audiences' time and attention, we continue to see longer-term falls in interest and trust in news across age groups and markets – particularly among younger audiences. Under 35s are the lowest-trusting age groups, with only a third (37%) of both 18-24s and 25-34s across all markets saying they trust most news most of the time, compared with nearly half of those 55 and older (47%). Young people also increasingly choose to avoid the news, with substantial rises in avoidance among social natives since we last asked this question in 2019. Across all markets, around four in ten under 35s often or sometimes avoid the news now, compared with a third (36%) of those 35 and older.

PROPORTION WHO SOMETIMES OR OFTEN ACTIVELY AVOID NEWS – BY AGE (2017-22) – ALL MARKETS



Q1di 2017. Do you find yourself actively trying to avoid news these days? Base: 18-24/25-34/35+ in all markets from 2017-22: 2017 = 7991/12,711/51,103, 2019 = 8272/13,361/54,116, 2022 = 11,304/16,862/65,266. Note: 36 markets in 2017, 38 markets in 2019, 46 markets in 2022.

Why is this happening? Most often, younger audiences (under 35) say the news has a negative effect on their mood (34%) and, most recently, that there is too much news coverage of topics like politics or Coronavirus (39%). In particular, the longstanding criticism of the depressing or overwhelming nature of news persists among young people. For instance, in the UK, two-thirds (64%) of news avoiders under 35 say the news brings down their mood. Our qualitative research participants described forming habits of avoiding this negativity.

I tend to try and limit the amount of negative news I consume, especially first thing in the morning and last thing at night. I don't want it to affect my day or make me worry.

Female, 29, UK

Depending on my mood, if I see news that I know is bad, is going to upset me, sometimes I leave it and read it later.

Male, 24, Brazil

Young people, particularly digital natives (27%), also at times avoid the news because they perceive it as biased or untrustworthy. As under 35s grew up in the digital age and have been socialised by older generations to be critical of the information they consume, our qualitative research suggests they take a particularly sceptical approach to all information and often question the 'agenda' of purveyors of news. In this sense, mainstream news brands are not inherently more valued for impartiality by some young people, and their wariness of bias at times pushes them away from consuming news altogether.

I do not think anything is 100% reliable in the mainstream media. You can never think that that is the absolute truth, because we are not sure of anything.

Female, 24, Brazil

A lot of the time, mainstream news can be very biased or politically motivated. This makes it hard to decipher its credibility.

Female, 28, USA

Yet many young people are not necessarily avoiding all news. In fact, many of them are selectively avoiding topics like politics and the Coronavirus specifically. As the Executive Summary notes, these patterns of selective news avoidance are not limited to younger audiences. But our qualitative research suggests that, among these groups, perceptions of political news are intrinsically tied to other themes of news avoidance: beliefs that it is particularly negative, that there is nothing they can do with the information, or that it is less trustworthy than other forms of news. Rather than simply avoiding news, there is ‘news to be avoided’.

I actively avoid news about politics as it frustrates me. It makes me feel small and no matter what my views it won't make any difference at all to what goes on in the country or world, so there is no point listening to it.

Female, 22, UK

On days where I really want to relax, I avoid political news because it gets me anxious sometimes.

Female, 24, USA

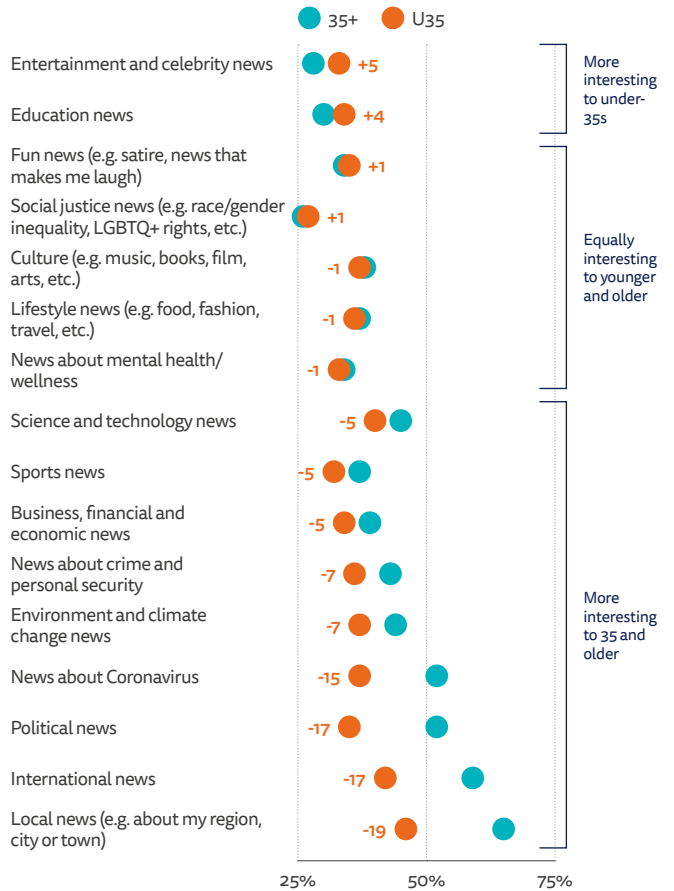
WHAT IS NEWS TO YOUNG PEOPLE?

These perceptions of too much newsroom attention going towards topics like politics and Coronavirus also reflect younger audiences’ broader desire for diverse news agendas, voices, and perspectives. As we discuss throughout this report, young people – particularly 18–24s – have different attitudes toward how the news is practised: they are more likely than older groups to believe media organisations should take a stand on issues like climate change and to think journalists should be free to express their personal views on social media.

On top of that, many young people have a wider definition of what news is. As our qualitative research reveals, younger audiences often distinguish between ‘the news’ as the narrow, traditional agenda of politics and current affairs and ‘news’ as a much wider umbrella encompassing topics like sports, entertainment, celebrity gossip, culture, and science. This is reflected, for instance, in the examples of ‘news’ our interview participants shared: from stories about the world’s biggest strawberry to pollution on local beaches to the latest episode of *Big Brother*.

Given that young people are generally less interested in news and access it less frequently than older audiences, it is not surprising that under 35s express lower interest in most news topics generally. But they are particularly less likely to be interested in what they consider to be ‘the news’ – traditional beats like politics, international, and crime news – and tend to be less inclined to consume Coronavirus coverage. Instead, under 35s are more likely to be interested in ‘softer’ news topics: entertainment and celebrity news (33% interested), culture and arts news (37%), and education news (34%).

PROPORTION WHO SAY THEY ARE INTERESTED IN EACH NEWS TOPIC – BY AGE – ALL MARKETS



Q1d_2022. Which of the following types of news, if any, are you interested in? Base: Under 35/35 and older. All markets = 28,166/65,266.

I like news about sports, food, well-being, and health. I don't like seeing news about violence.

Male, 27, Brazil

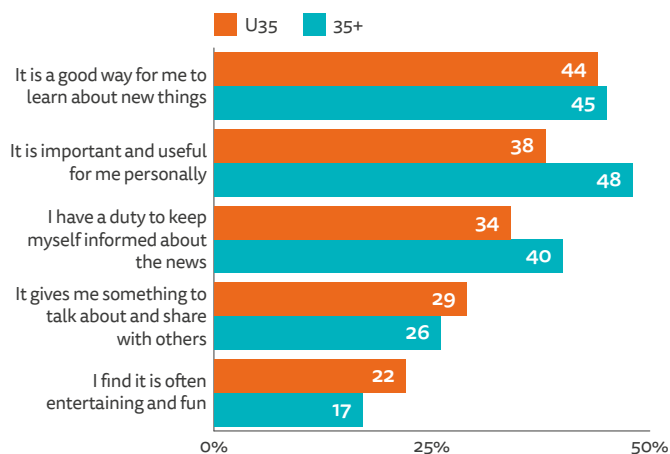
Even many of the types of news often deemed ‘young’ topics – for instance, mental health and wellness, environment and climate change news, and fun news or satire – do not necessarily translate into greater interest among all young people across all markets (or at least, interest in news, specifically, about these topics). Younger audiences on average don’t have much higher interest than older audiences in news on social justice issues, for instance, though this interest varies dramatically by market. Interest in social justice news is nine percentage points higher among under 35s than those 35 and older in the UK, on a par across both groups in Brazil, and seven percentage points lower among under 35s in Germany. As we discuss in a later section, those 35 and older are also more likely than younger people to say they are interested in environment and climate change news.

MOTIVATIONS TO ACCESS NEWS

This year, we also asked about why people personally choose to keep up with the news. All age groups see the news as equally important for learning new things, but news users under 35 are slightly more motivated than older groups by how entertaining the news is and how sharable it is, and they are slightly less motivated than older groups by a sense of duty to stay informed of news or by its personal usefulness to them.

However, the extent to which young people feel a sense of duty to consume news looks very different across countries – for instance, with huge gaps between those under versus over 35 in Brazil and the US but very small gaps by age in France and Japan. And in the UK, a sense of duty to be informed and feeling the news helps them learn new things are tied for the top motivation for consuming news among under 35s. Together with insights from our qualitative research, this suggests that young audiences engage in a sort of mix-and-match of motivations depending on their interests as well as the types of content they are thinking of or seeking out.

PROPORTION WHO SAY EACH IS WHY THEY KEEP UP WITH THE NEWS – BY AGE – ALL MARKETS



QMotivations_2022a. Which, if any, are the most important reasons for you, personally, to keep up with the news? Please choose up to three options. Base: Under 35/35 and older. All markets = 28,166/65,266.

I access the news partially for fun and partially for entertainment but also to be informed. There are also science magazines, where it's not fun, but it's not 'need to know' either.

Female, 23, USA

I am looking for what I need to know to stay relevant with current events ... That news is important and relevant to my life. Also, I look for news that is going to entertain my personal interests and fun news that is exciting to discover such as current celebrity news.

Male, 27, USA

CONCLUSIONS

As the digital media environment rapidly evolves and more young adults who grew up with social media enter our sample, key differences among younger news audiences continue to crystallise. The point here is not simply that some of young people's behaviours and preferences are different from those of older people. They long have been. It is that the differences seem to be growing, even between social natives and digital natives. Many of these shifts in behaviours are so fundamental that they appear unlikely to be reversed with time. The youngest cohort represents a more casual, less loyal news user. Social natives' reliance on social media and weak connection with brands make it harder for media organisations to attract and engage them.

At the same time, younger audiences are also particularly suspicious and less trusting of *all* information. This, along with the often-depressing nature of news and the overwhelming amount of information they encounter in their daily lives, makes young people sceptical of news organisations' agendas and increasingly likely to avoid the news – or at least certain types of news. While young people do not all have the same needs, many are looking for more diverse voices and perspectives and for stories that don't depress and upset them.

Social natives in particular have increasingly moved towards new visual social networks – but they are not simply all TikTokers, nor do they all have limited attention spans when it comes to serious information. Young people like a range of formats and media, from text to video to audio, and are drawn to information that is curated for them. There will continue to be a place for text, video, audio, and still imagery – sometimes all in one piece of content. And there will be a place for both the serious, impartial tones of traditional media and more casual, entertaining, or advocacy-centred approaches to covering news.

Younger audiences' definitions of *what news is* are also wider. Recognising the variety of preferences and tastes that exist within an incredibly diverse cohort presents a new set of challenges for media organisations. But one route to increased relevance for news brands may lie in broadening their appeal – connecting with the topics young people care about, developing multimedia and platform-specific content, and aligning content and tone with format – rather than entirely replacing what they already do or expecting young people to eventually come around to what has always been done. At times, this includes continuing with what news brands currently offer, some of which is highly valued by younger audiences. In moments when they feel they 'need to know' what is happening – as with COVID-19 and the Russia-Ukraine conflict – young people still want news brands to be there.

A full report on the findings of the qualitative study in the UK, US, and Brazil will be published in September 2022 (in conjunction with Craft).

2.4 Email News: Its Contribution to Engagement and Monetisation

Nic Newman

In the last few years, the emergence of paid newsletter platforms, such as Substack, Revue, and Bulletin, have opened up new opportunities for individuals and small publishers to distribute and monetise content. A number of high-profile columnists have left big news organisations to run newsletter-based businesses, with a few of the most successful earning salaries in the high six figures.¹⁹

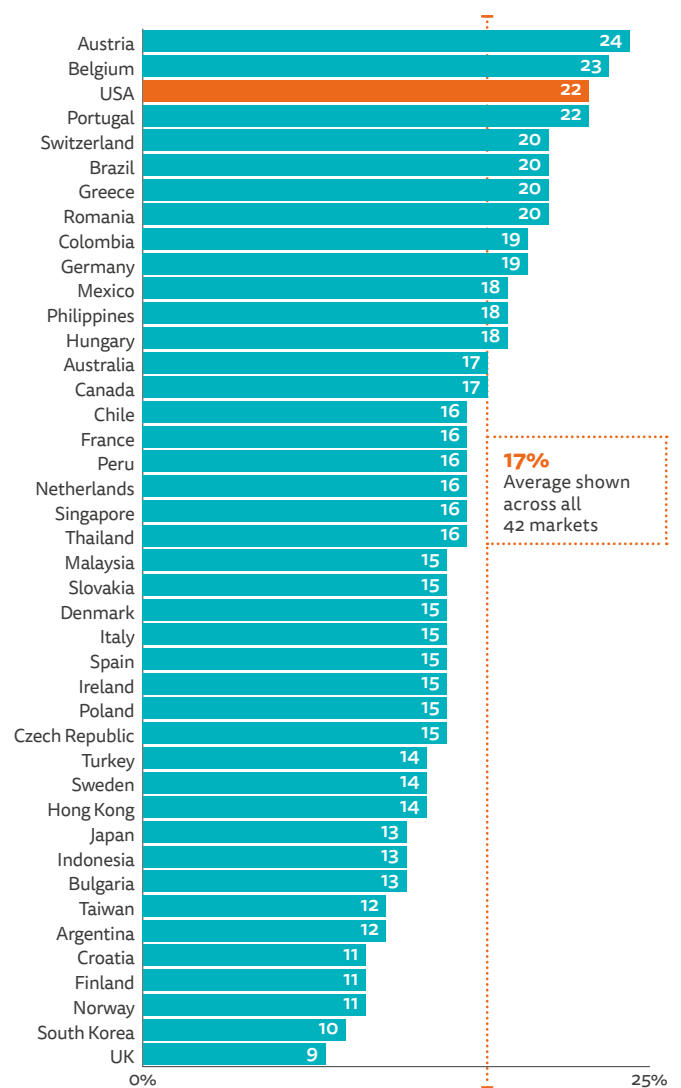
At the same time, digital-born brands such as Politico and Axios have found that smart, journalist-curated emails have been a key driver of growth for businesses which cover a range of niches from politics to health, technology, sports, and local.²⁰ Meanwhile, mainstream news organisations have been shifting resources into email production as they try to attract new subscribers, build loyalty with existing users, and introduce more personalisation into their digital products (Jack 2016; Newman et al. 2020). The *New York Times*, for example, now produces 50 different emails read by 15 million people a week.²¹

Much of this recent free and paid newsletter activity has been focused on the United States, but we were keen to know if this had extended elsewhere. More widely, we wanted to understand more about the appeal of newsletters in general. In what ways can this low-tech and often unfashionable medium help build or support sustainable journalism?

WEEKLY EMAIL CONSUMPTION

Our *Digital News Report* data show that email newsletters remain an important channel across countries, with an average of 17% using them weekly. In the United States, 22% use newsletters or email alerts, with almost half of them (10%) saying it is their *main way* of accessing digital news. Austria (24%), Belgium (23%) and Portugal (22%) also have surprisingly high email usage, but Norway (11%) and the UK (9%) have some of the lowest levels. This may be because their stronger brand connections – with users more likely to go directly to website and apps – mean that publishers feel there is less need to push content to audiences.

PROPORTION WHO ACCESSED NEWS VIA EMAIL IN THE LAST WEEK – SELECTED MARKETS



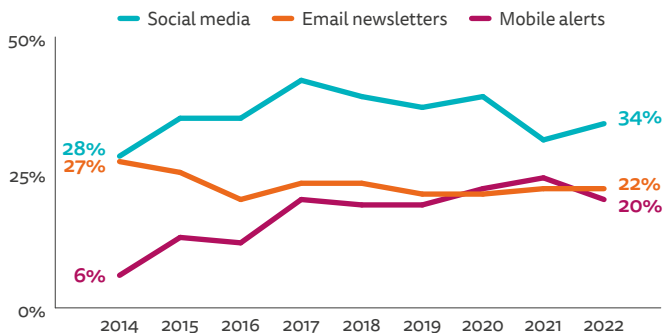
Q10. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which were the ways in which you came across news stories? Base: Total sample in each market (n = 2000).

¹⁹ Substack now has 1m paid subscribers with the top 20 newsletters collectively making more than \$20 million a year. More at <https://www.vanityfair.com/news/2021/11/substack-paid-subscriber-milestone-new-york-times-atlantic>
²⁰ <https://www.axios.com/newsletters/local>
²¹ <https://www.niemanlab.org/2021/08/the-new-york-times-is-making-about-a-third-of-its-newsletters-subscriber-only/>

WHO IS ACCESSING EMAILS?

Despite the increase in the supply of newsletters in the last few years, the proportion accessing them has actually fallen in many countries, in part because of increased competition from newer channels such as social media, online aggregators, and news alerts via mobile phones. In the United States, weekly use has fallen slightly from 27% to 22% since 2014 as the use of mobile alerts has tripled from 6% to 20% and social media access has also grown.

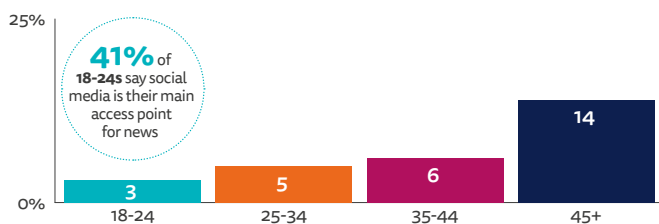
PROPORTION WHO ACCESSED NEWS VIA EACH IN THE LAST WEEK (2014-22) – USA



Q10. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which were the ways in which you came across news stories? Base: Total 2014-22 sample (n = 2000).

It is important to note that email news is valued mainly by older, richer, and more educated news consumers, most of whom are already deeply invested in news. One in seven (15%) of over 55s in the United States say email is their main way of accessing news – about the same as say social media. But only 3% of 18-24s rely on email access as a main source compared with 41% for the same group who say social media. More than 80% of all of those in the United States who use email for news are 35 or older.

PROPORTION WHO SAY EMAIL IS THEIR MAIN WAY OF ACCESSING NEWS ONLINE – BY AGE – USA



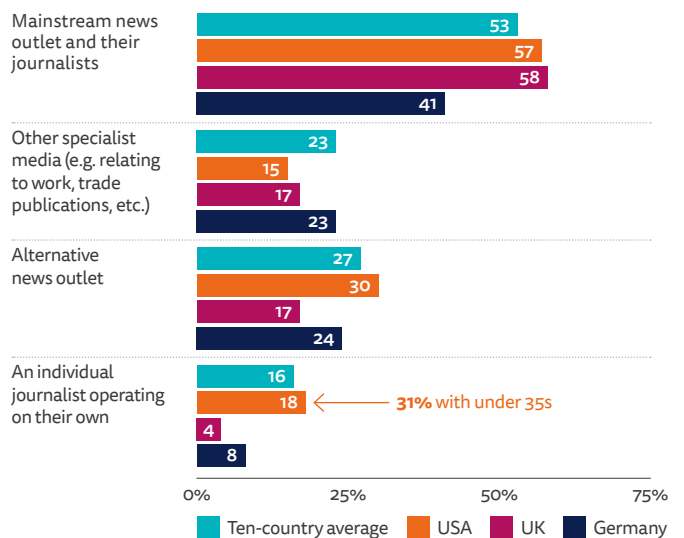
Q10a. Which of these was the **MAIN** way in which you came across news in the last week? Base: All who accessed news online in the last week: 18-24 = 180, 25-34 = 332, 35-44 = 250, 45-54 = 54, 55+=802.

MOST NEWSLETTERS COME FROM THE MAINSTREAM MEDIA, NOT FROM SOLO OPERATORS

When looking at the originating source, we find that across ten selected countries,²² over half (53%) of those who get news emails receive them from mainstream media organisations. Other sources of email news include alternative news sources (27%), specialist media that people may find useful for work (23%), and individual journalists operating on their own (16%).

Strikingly, our data show that emails from individual journalists in the United States (18%) are almost five times as popular as in the UK (4%) and more than twice as popular as in Germany (8%), illustrating how much further journalist-led media businesses have developed in the large and entrepreneurial US market. Younger respondents in the US were also much more likely to be receiving emails from individual journalists operating on their own than older respondents. We also find a significant overlap between those receiving emails from the mainstream media and these other sources. This suggests that alternative and journalist-led emails, which often speak to smaller and more specialist audiences, are often used as a supplement to general news emails – rather than a replacement.

PROPORTION ACCESSING EMAIL NEWSLETTERS FROM EACH SOURCE – SELECTED MARKETS

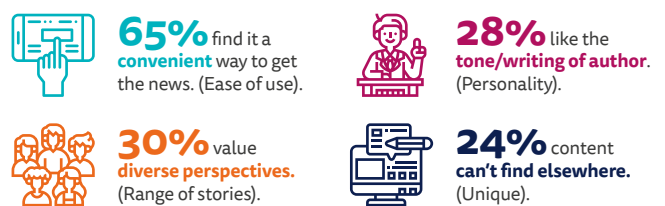


Q. Email_SOURCES_2022. You say that you accessed news via an email newsletter or alert in the last week. Where do your emails come from? Base: All who accessed news via email in the last week: UK = 217, USA = 465, Germany = 377, 10-country average = 3347. Note: The countries included in the 10-country average are: Germany, Ireland, Norway, Belgium, Japan, South Korea, India, Australia, UK, USA.

MOTIVATIONS FOR USING EMAIL NEWSLETTERS

The majority of email newsletter users say they enjoy the convenience of the format (65%), followed by the diverse perspectives (30%), with the tone and personality of the author (28%) and unique content (24%) also important factors for many. These perceived benefits are remarkably similar across the ten countries we surveyed, though the authorial voice was valued more in South Korea (40%) and India (55%).

REASONS FOR USING EMAIL NEWSLETTERS AND ALERTS – AVERAGE OF 10 COUNTRIES



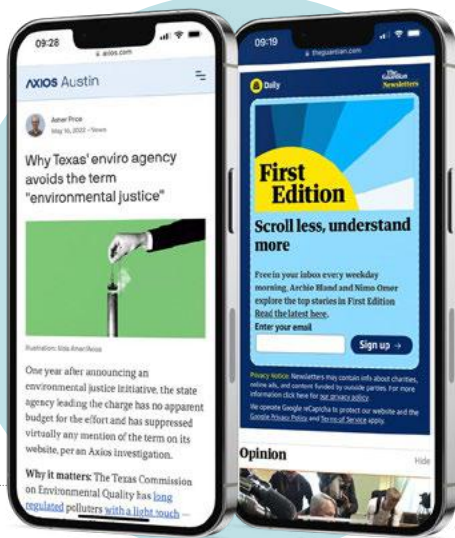
Q>Email_likes. What do you like about the email newsletter format? Base: All who accessed news via email in the last week: 3347. The countries included in the 10-country average are: Germany, Ireland, Norway, Belgium, Japan, South Korea, India, Australia, UK, USA.

²² Countries selected to provide a range of light, mid, and heavy email use cases: USA, UK, Germany, Ireland, Norway, Belgium, India, South Korea, Japan, Australia.

What people mean by convenience becomes clear in open-ended survey responses: 'I enjoy receiving headlines in emails. I can read the article, or skip it, and use keywords for more research on the topic', says one respondent who appreciates the *control and choice* this format provides.

For others, convenience is more about the *time-saving* aspect of email. '5 things you need to know today' formats became widespread during the COVID pandemic and have now been adapted by digital operations at CNN and the BBC, for example, to other situations including Ukraine. Axios, which we have already mentioned, pioneered a pithy and concise email-writing style which it has termed 'smart brevity' to describe the value of these heavily curated products.

EXAMPLES OF 'CONVENIENCE' BENEFITS OF EMAIL



Axios Local: **smart brevity**

The Guardian: **time saving**

[I enjoy ...] Axios Austin, because it gives me five stories per day that are short and sweet.
Male, 37, USA

A decade or so ago, most email consisted of a set of automatically selected links on a particular subject, but a distinguishing feature of email newsletters today is the personality of the author. Pulitzer-prize winning journalist David Leonhardt has been curating The Morning from the *New York Times* for several years, bringing to it a more relaxed and informal tone. The newsletter is now read by more than 5 million people each day on average, making it many readers' first daily interaction with the paper's journalism.

The NY Times morning email has a nice lens and covers a variety of things. For bigger news stories, it consolidates information and voices from its reporters who are covering the topic – kind of bringing you 'up' to view the subject from a more strategic, bigger picture.

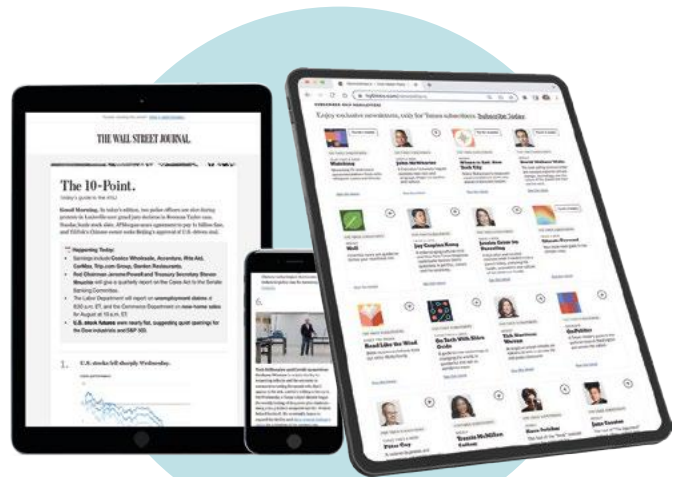
Female, 63, USA

But bringing a more human tone into emails can also risk injecting bias and polarising opinions. Leonhardt, for example, has been heavily criticised for his reporting of COVID-19, which suggested that over-anxious responses were doing more harm than good.²³ Against this background, rival emails, like the 1440, stress the impartial curation of more than 100 sources, while the Flipside looks to bring perspectives from across political divides. There are many different ways to deliver a successful email.

SPECIALIST MEDIA FIND AN AUDIENCE

Beyond general news and politics, email newsletters have been able to open up content on a long tail of subjects that would not have been practical to distribute using traditional media, or that people may have otherwise missed on a general interest news site with hundreds of stories published every day. Our respondents documented specialist emails about guns, animal husbandry, gender, their local church, the global environment, and much more. Many of these niche emails now come from beat reporters in mainstream media companies, but others are authored by passionate individuals.

More widely, traditional media companies are changing their strategies towards a channel that was previously treated largely as automated marketing. The *Wall Street Journal* has bundled the 10-Point morning briefing into its core subscription product, while the *New York Times* has recently converted 11 of its newsletters into subscriber-only products and added some new ones – in part to strengthen retention.



WILL PEOPLE PAY FOR NEWS EMAILS?

The vast majority of general news emails are free to access and are likely to remain so. Publishers see them as an effective way to engage users and bring them back more regularly to websites or apps where they can monetise traffic. But in some other cases, where a writer has a unique voice or strong opinions, the last few years have shown that it is possible for some to charge for content and/or to add value to an existing subscription bundle. Andrew Sullivan's the Daily Dish offers 'unique analysis of the news', according to one respondent who pays \$5 a month for the privilege – just one of dozens of paid-for newsletters mentioned by our respondents.

²³ <https://nymag.com/intelligencer/2022/02/david-leonhardt-the-pandemic-interpreter.html>



A survey is not necessarily the best way of capturing the complexity of this story, but in a separate question about news subscription, we find that 7% of those paying for online news in the US subscribe to an email-led news product from an individual journalist, while that figure is only 1% in Germany. The 'Substack revolution' for news is still primarily a US phenomenon and it is not guaranteed to catch on elsewhere, especially given the difference in market size and context.

CONCLUSIONS

Across all countries, we find that email news is still a minority activity that appeals mostly to older and better educated readers. Usage has actually declined in many countries at the same time as the value to some users and some news organisations has grown. Despite its relative lack of sophistication, it remains a key tool for publishers as they focus on building deeper relationships with loyal users – as well as attracting new subscribers. Respondent comments show that the characteristics of the most successful email newsletters – convenience, unique perspectives, and a personal touch – are becoming increasingly valuable to a particular subset of users in a world of information abundance and overload. The human aspect is particularly important, with many appreciating the lightness of touch that can be provided by a personality guiding people through the news. Others find email a more efficient way of keeping in touch with a specialist subject area than, for example, browsing through a website.

As email formats continue to evolve, we also find new business models starting to emerge – beyond sponsorship and advertising. Paid newsletters are still largely confined to the United States but the opportunities are likely to grow for those that can combine unique content with the convenience that has become the hallmark of this enduring medium.

2.5 Which Journalists do People Pay Most Attention to and Why? A Study of Six Countries

Craig T. Robertson and Nic Newman

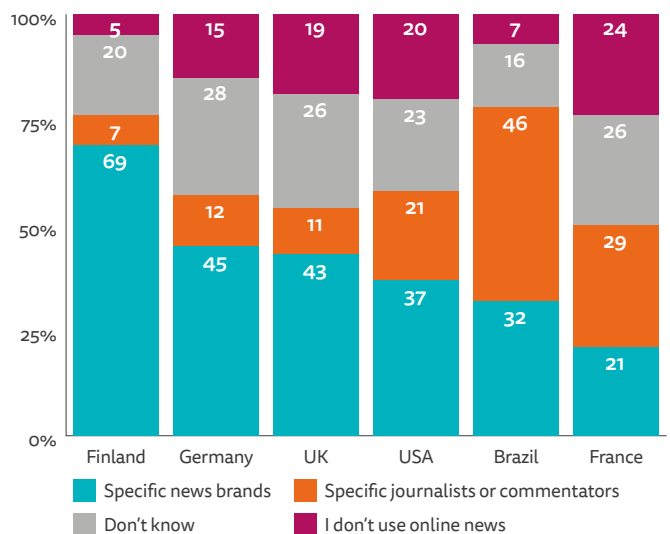
In the pre-internet age, journalists’ careers were inextricably linked with the outlets they worked for. But the rise of social media and other tech platforms has allowed many individual journalists – along with many others, whether activists, creators, influencers, or political figures – the opportunity to break away and build their own profiles independently of any particular news brand. As we heard in the previous chapter, some journalists have used email or subscription platforms to monetise their personal connection with audiences – enabling the most successful few to make significant amounts from subscriptions. Elsewhere, within mainstream media itself, the price of top journalistic talent has risen substantially in an increasingly competitive media landscape – especially for those news anchors, columnists, commentators, and podcasters who are able to attract significant audiences.

But to what extent do people identify with individual journalists rather than news brands? Do the journalists people say they pay attention to represent individual entrepreneurs, newer digital-born brands, or are they mainly drawn from traditional brands in radio, television, or print? And are the journalists whom people are able to name mainly trading in facts or opinion? To address these questions, for the purposes of this chapter, which combines qualitative and quantitative survey responses, we focus on six countries – the US, UK, Brazil, Germany, France, and Finland – that represent different media landscapes and journalistic traditions across our wider sample.

NEWS BRANDS OR JOURNALISTS?

We asked respondents in our survey whether they paid most attention to specific journalists or to news brands when looking for news online. Looking across our six countries, we see significant differences in terms of the attention paid, with stronger affinity toward news brands in Northern/Western European markets such as Finland, Germany, and the UK, but greater identification with individual journalists or commentators in Brazil and France. The United States is somewhere in the middle, with around a third paying most attention to brands and a fifth to journalists.

PROPORTION WHO PAY MOST ATTENTION TO NEWS BRANDS VERSUS JOURNALISTS – SELECTED MARKETS



Journalists_1. When looking for news online, which of the following do you tend to pay most attention to? Base: Finland = 2064, Germany = 2002, UK = 2410, USA = 2036, Brazil = 2022, France = 2059.

Accounting for this strong affinity with news brands, we note that countries like Finland, Germany, and the UK have historically strong national media brands which have largely managed to maintain a direct connection to audiences as they have transitioned online. In Finland, for example, 65% say they prefer to access news online by going directly to a branded website or app. By contrast, audiences in the United States (24%), France (15%), and Brazil (11%) are less likely to prefer news access via branded sites and are more dependent on social media for news access (where personalities attract attention and brands can sometimes find it hard to cut through).

Other explanations may relate to the types of journalism that are practised in different countries. Public service media in Finland (YLE), Germany (ARD, ZDF), and the UK (BBC) are large and well-known, and their journalists bound by impartiality rules. By contrast, news in Brazil and the United States is mostly commercial, with some media built around controversy, emotion, and the strong opinions of journalistic personalities.

To understand more about these dynamics, we asked respondents to name up to five specific journalists they pay attention to, using an open-ended question in our survey. Across countries, less than half of our sample named a single journalist, though this may be at least partly due to low response rates in general for these types of open questions. We focus in the following sections on the journalists who were named in six countries.²⁴

UK AND US COMPARED

We find that the most-named journalists in the UK are political correspondents, who appear regularly on TV. Both the BBC's Laura Kuennsberg and ITV's Robert Peston have been on screens most evenings for several years, covering the Brexit fallout and COVID-19 pandemic, but they are also prolific across social media channels – with 1.3m and 1.2m Twitter followers respectively. Also high on the list is Piers Morgan, a news presenter who has forged a reputation for strong personality-based interviews and who has almost 8m Twitter followers. Three opinion columnists from the *Guardian* also make the top list, a testament to the high online reach of the left-leaning publication which doesn't have a paywall. The BBC accounts for a third (34%) of all mentions, followed by ITV (12%) and the *Guardian* (11%).

Turning to the United States, we find respondents paying attention to journalists who express a higher degree of opinion and political partisanship. Cable TV hosts such as Tucker Carlson and Sean Hannity from Fox News and Rachel Maddow from MSNBC have the most name recognition, with TV presenters and anchors accounting for the entire top-ten list. Over half (53%) of the most-recognised journalists work for just three organisations: Fox News, NBC/MSNBC, and CNN.

This list reminds us that cable TV continues to punch well above its weight in engaging Americans with the news. Cable personalities, despite the criticisms often levelled at them, draw attention and remain memorable to audiences. They also feature prominently on digital channels, further increasing their visibility. On Twitter alone, Rachel Maddow has over 10m followers, while Tucker Carlson has over 5m.

TEN MOST-MENTIONED JOURNALISTS AND THEIR ROLES – UK



	Journalists	Brand	Role
1	Laura Kuennsberg	BBC	Political Correspondent
2	Robert Peston	ITV	Political Correspondent
3	Huw Edwards	BBC	TV Presenter/Anchor
4	Piers Morgan	ITV/TalkTV	TV Anchor/Columnist
5	Jon Snow	Channel 4	TV Presenter/Anchor
6	Marina Hyde	Guardian	Columnist (print)
7	Andrew Marr	BBC/LBC	TV & Radio Presenter/Anchor
8	John Crace	Guardian	Columnist & sketch writer (print)
9	Owen Jones	Guardian	Columnist (print)
10	Pippa Crerar	Mirror	Political Correspondent



62%

of the journalists mentioned are from 'impartially regulated' broadcasters such as the BBC, ITV News, Sky News, Channel 4, GB News, Talk Radio and LBC.

TEN MOST-MENTIONED JOURNALISTS AND THEIR ROLES – USA



	Journalists	Brand	Role
1	Tucker Carlson	Fox	TV Presenter/Anchor
2	Rachel Maddow	MSNBC	TV Presenter/Anchor
3	Sean Hannity	Fox	TV Presenter/Anchor
4	Lester Holt	NBC	TV Presenter/Anchor
5	Anderson Cooper	CNN	TV Presenter/Anchor
6	David Muir	ABC	TV Presenter/Anchor
7	Jesse Watters	Fox	TV Presenter/Anchor
8	Don Lemon	CNN	TV Presenter/Anchor
9	Laura Ingraham	Fox	TV Presenter/Anchor
10	Bret Baier	Fox	TV Presenter/Anchor



74%

of the journalists mentioned are TV or radio broadcasters, with a significant portion hosting 'partial' opinion-based shows on channels such as Fox and MSNBC.

Q_Journalists_2. Please type in the names of up to five journalists that you regularly pay attention to (e.g. news presenters, columnists, or reporters). Base: UK = 2410, USA = 2036.

Only around one in ten (9%) of US journalists mentioned is employed by a print outlet, compared with almost a third (30%) in the UK. Columnist Peggy Noonan is among those named from the *Wall Street Journal*, while columnists at the *New York Times*, such as Paul Krugman, Maureen Dowd, and Ezra Klein, also feature. About one in seven (14%) work for a digital-born news organisation – a much higher figure than in the UK (around 2%).

²⁴ Analysis was performed on unweighted data. Named journalists were coded the same way across markets. They were classified according to (i) the media market they work in, (ii) their gender (male/female), (iii) their race/ethnicity (white/non-white; UK and US only), (iv) the primary news outlet they work for, (v) the type of media outlet they work for (broadcast, print, digital-born), and (vi) their main role (e.g., presenter/anchor, correspondent/reporter, columnist/commentator, other). Some journalists worked for more than one news outlet and had multiple roles. In these cases, journalists were classified by the outlet/role they are best known for in the public eye. In some cases, we deferred to journalists' self-descriptions of their primary outlet and role.

TV DOMINATES IN BRAZIL AND FRANCE BUT NOT SO MUCH IN FINLAND

Similar to the US, television journalists are prominent in the most-named lists in Brazil and France. In Brazil, William Bonner, anchor for the country's popular *Jornal Nacional*, heads the list, followed by crime TV presenter José Luiz Datena and another TV Globo presenter, Maria Júlia ('Maju') Coutinho. The vast majority (86%) of named journalists in Brazil are presenters or anchors from broadcast media, and more than four in ten (41%) work for TV Globo, just one part of Brazil's biggest news and entertainment company, reflecting the powerful position of this brand. A further fifth (17%) work for other top broadcasters Record TV or Band TV. Just 4% of the journalists mentioned work for any print outlet.

The story in France is very similar, with, if anything, an even greater focus on TV news presenters. Nine in ten journalists named in France work in broadcast media, primarily at television outlets such as TF1 and France Télévisions – which received 23% and 21% of mentions respectively. Topping the French list are TV presenters Pascal Praud and Anne-Claire Coudray. As in Brazil, journalists from national newspapers like *Le Monde* and *Le Figaro* are rarely mentioned, with only 6% of names coming from print media. Neither country sees any significant number of journalists from digital media outlets named (4% in Brazil, 3% in France).

THREE MOST-MENTIONED JOURNALISTS AND THEIR ROLES – SELECTED MARKETS



BRAZIL

Journalists	Brand	Role
1 William Bonner	TV Globo	Presenter/Anchor
2 José Luiz Datena	Band TV	Presenter/Anchor
3 Maria Júlia Coutinho	TV Globo	Presenter/Anchor



FRANCE

Journalists	Brand	Role
1 Pascal Praud	CNews	Presenter/Anchor
2 Anne-Claire Coudray	TF1	Presenter/Anchor
3 Jean-Jacques Bourdin	RMC	Presenter/Anchor



GERMANY

Journalists	Brand	Role
1 Marietta Slomka	ZDF	Presenter/Anchor
2 Claus Kleber	ZDF	Presenter/Anchor
3 Peter Kloeppel	RTL	Presenter/Anchor



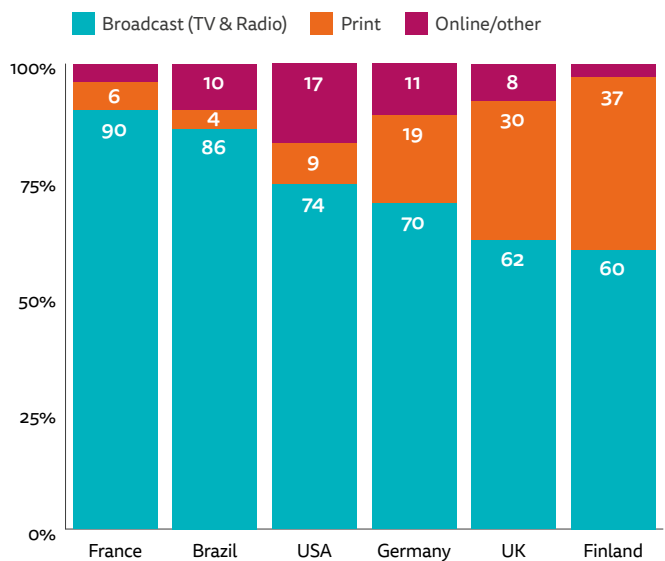
FINLAND

Journalists	Brand	Role
1 Sanna Ukkola	AlfaTV/ Iltalehti	TV Presenter (AlfaTV) and Columnist (Iltalehti)
2 Matti Rönkä	Yle	Presenter/Anchor
3 Timo Haapala	Iltä-Sanomat	Political Correspondent/ Columnist

The picture in Finland, meanwhile, is a little different. Like the UK, there is more focus on journalists from print media, with over a third (37%) of names being columnists or reporters for outlets such as *Iltalehti*, *Iltä-Sanomat*, and *Helsingin Sanomat*. Together, these papers received a third (32%) of mentions, reflecting the continued prominence of print news brands in Finland. Public broadcaster Yle received 35% of mentions, with presenter Matti Rönkä ranking first equal alongside former Yle presenter (and current AlfaTV presenter/*Iltalehti* columnist) Sanna Ukkola. Among the most-mentioned brands is also MTV3, with 22% of named journalists working for this outlet. In all, six in ten (60%) journalists named in Finland work for broadcast media – a lower figure than other countries, but still high. Again, journalists working for digital-born media do not feature prominently.

Finally, an in-between country is Germany, where there are somewhat more print journalists (19%) named than in Brazil or France, but fewer than the UK and Finland. Those named are spread across outlets including *Die Welt*, *Die Zeit*, and *Der Spiegel*. The proportion of journalists named from broadcast media is also in the middle of the pack (70%), with this seven-in-ten figure being largely driven by the prominence of ARD, ZDF, and RTL, which make up two-thirds (64%) of mentions. Reflecting the wide popularity of these broadcasters, the most-named journalists are ZDF *heute-journal* anchors Marietta Slomka and (formerly) Claus Kleber, alongside RTL *aktuell* host Peter Kloeppel.

PROPORTION OF JOURNALISTS MENTIONED FROM EACH MEDIA TYPE – SELECTED MARKETS



Most occurring brands by journalists named



Q_Journalists_2. Please type in the names of up to five journalists that you regularly pay attention to (e.g. news presenters, columnists, or reporters). Base: Total sample in each market (n = 2000).

Q_Journalists_2. Please type in the names of up to five journalists that you regularly pay attention to (e.g. news presenters, columnists, or reporters). Base: All who mentioned the name of a journalist: France = 723, Brazil = 1008, USA = 635, Germany = 327, UK = 576, Finland = 431.

HOW DIVERSE ARE THE NAMES?

Across the six markets, the majority of journalists named are men, with the proportion as high as 71% in Brazil and 70% in the US.²⁵ Only Finland is anywhere near parity in the gender balance of named journalists – 59% are men.

PROPORTION OF NAMED JOURNALISTS WHO ARE MALE/FEMALE – SELECTED MARKETS

	UK	USA	Brazil	Finland	Germany	France
Male	64	70	71	59	67	66
Female	36	30	29	41	33	34

Q Journalists_2. Please type in the names of up to five journalists that you regularly pay attention to (e.g. news presenters, columnists, or reporters). Base: All who mentioned the name of a journalist: France = 723, Brazil = 1008, USA = 635, Germany = 327, UK = 576, Finland = 431.

Gender disparities also persist across media, with only a third of names in broadcast media and four in ten names in print media being women, on average, across countries. These numbers are yet another reflection of the lower visibility of women in the news media (Eddy et al. 2022a).

Across our six countries, some specific outlets, however, see more equality. The BBC nears gender balance in named journalists, with 46% of mentions being women. This is similar to ZDF (47% women) and France Télévisions (53% women). On the other hand, top-named print reporters and columnists in places like the UK, US, and Germany tend to be overwhelmingly male.

While these numbers do not necessarily reflect the percentage of men versus women who are employed in the news media, they are a reflection of the prominence that some – mostly male – journalists have in the public eye. This imbalance in visibility is further reflected when we look at white and non-white journalists named. In the UK, 9% of journalists named are non-white, while the figure is 16% in the US. Both figures are far below the percentage of non-white people in the general population in each country, perhaps again indicating a lack of non-white visibility in journalistic and top editorial positions (Eddy et al., 2022b).

WHAT IS A JOURNALIST?

An interesting outcome of this data collection is that it shows the audience's definition of what it means to be a journalist is now much wider than 'someone who works for mainstream media'. According to our respondents, journalists can now include YouTubers, podcasters, comedians, authors, and social media influencers. Those whom we classified as 'alternative' or 'independent' account for around 15% of all named journalists in the United States, but far less in all other countries.

This striking US figure is boosted by mentions of numerous individuals from the vast conservative/right-wing media ecosystem. They include conservative activists and provocateurs, and some high-profile named individuals are also associated with alt-right and conspiracy movements. Having been repeatedly accused of spreading misinformation, some have been banned from social media but maintain connection via websites, video channels, and newsletters. Respondents to our survey who pay attention to these alternative sources overwhelmingly self-identify on the right or the far right. But we also find another group of independent journalists that include former mainstream journalists like Megyn Kelly (ex-Fox News and NBC) and Katie Couric (ex-ABC) who have now set up on their own and operate across multiple channels.

In Brazil, there is also a lively independent scene with popular YouTube channels hosted by former TV anchors, such as Leda Nagle, and younger stars like Zoe Martinez, who combines political and social discussions with personal vlogging adventures. In Germany, YouTuber and podcaster Tilo Jung attracts the attention of some younger respondents to our survey with a persona of a naive young man who asks his guests very basic questions about the news (Jung & Naiv).

Meanwhile, in parts of Europe, alternative perspectives are increasingly reflected in the mainstream media itself. Right-leaning politicians like Nigel Farage (GB News) and Éric Zemmour (CNews) – who stood in the French presidential elections this year – have worked as presenters or political commentators, and both featured in our named lists. This 'politicisation of journalism' may be one additional factor contributing to low trust in the news.

CONCLUSIONS

The fact that so many people struggled or were not inclined to name even a single journalist reminds us that many people do not pay as close attention to the news as the industry might hope. News brands continue to hold more relevance to people – particularly in places like Finland, Germany, and the UK – and when people do name journalists, they tend to be male and on television. Does this mean there is a visibility problem? Although every country has a woman in the top three most-named journalists, the lists become more male as you move down them. A perceived lack of real diversity may be contributing to the lack of engagement, especially with a younger generation who want more representation.

The prominence of television news anchors and commentators when compared with journalists from digital or print outlets also reminds us of the importance of this medium in forging a deeper connection with audiences. While print journalists are a little more prominent in the UK and Finland, across all markets there is a power that TV – far more than social media on its own – has to cement the names and faces of 'celebrity' journalists who anchor for major networks and popular shows. In some countries, these popular names are newsreaders with a commitment to impartiality but in others they are partisan hosts. This 'politicisation of journalism' – including the increased prevalence of politically motivated alternative vloggers and podcasters, particularly in the US – may have associations with low trust in news.

But is also striking that the most successful journalists have not stuck to a traditional medium. They have embraced new channels such as social media and this has enabled their journalism to be available 24 hours a day across platforms – further increasing their profile and reaching a much wider audience in the process.

Low representation of vloggers, podcasters, or other individual journalists is perhaps an inevitable function of the difficulty of scaling these models but it is interesting to pick up the growth of this new type of entrepreneurial journalism, especially in the United States. This is changing expectations of what a journalist might look like, bringing in a wider and more diverse set of voices, as well as, in some cases, louder and more extreme ones, too.

Additional thanks to Sascha Holig, Camila Mont'Alverne, Esa Reunanen, and Georgia Newman for coding open-ended responses in Germany, Brazil, Finland, and France respectively.

²⁵ To aid in our analysis of race and gender, as in prior Reuters Institute work, we employ binary coding systems, while recognising that both gender and race are complex and multidimensional.

2.6 How People Access and Think about Climate Change News

Craig T. Robertson

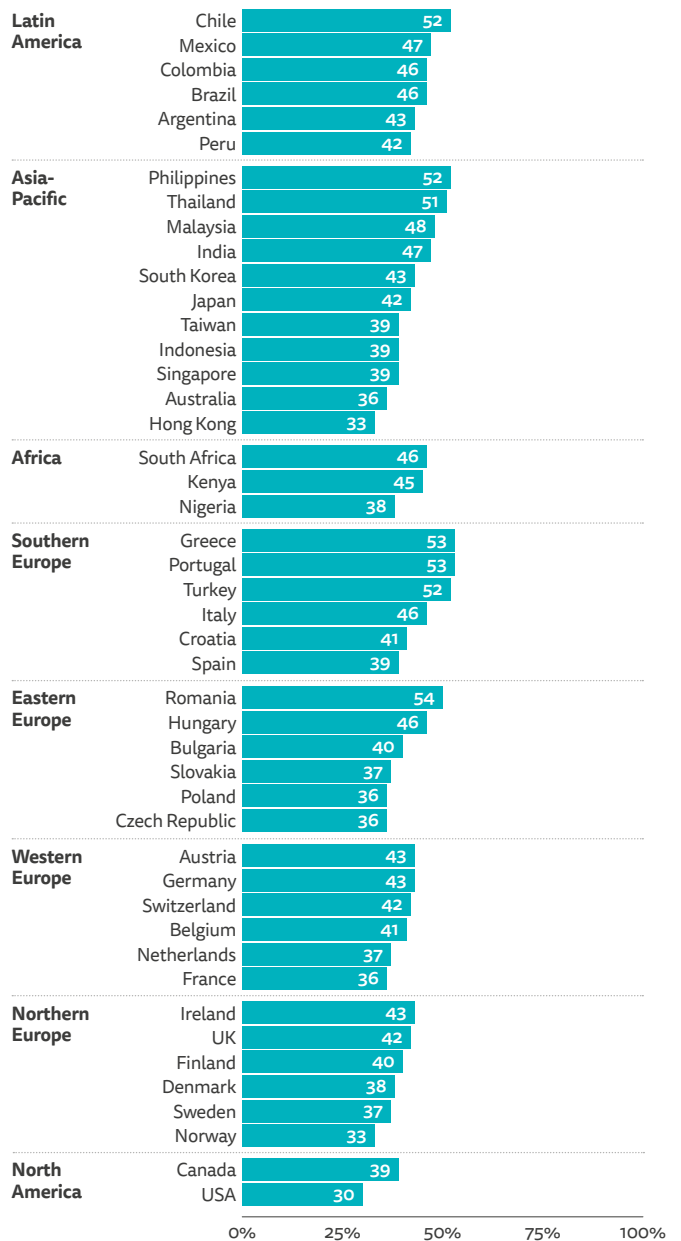
Climate change is one of the defining issues – if not the defining issue – of our era. But when it comes to news about this topic, media outlets often struggle to garner audience attention. The story can seem intractable, depressing, and often difficult to understand. It is also frequently politicised, with audiences polarised on the topic. In this chapter, following on from our examination of the topic in 2020,²⁶ we explore audience attitudes and behaviours as they relate to climate change news, providing insights which may help newsrooms in their thinking about how to cover such a complex issue, as well as how to generate audience interest.

INTEREST IN CLIMATE CHANGE NEWS

At an overall level, our data show that interest in climate change news is highest in several Latin American, Southern European, and Asia-Pacific markets. Just over half of respondents in Greece (53%), Portugal (53%), Chile (52%), and the Philippines (52%) say they are interested in news about climate change and the environment. Interest is lower in Northern and Western European markets such as Norway (33%) and France (36%), along with the United States (30%). At a broad level across markets, those who are more interested in climate change news tend to have higher levels of income and education. Perhaps surprisingly, they also tend to be older.

Examining what is driving some of these regional and country-level differences in interest, we find that one factor is polarisation. In markets with greater differences in interest between those on the political left versus right, there is less overall interest in climate change news. For instance, in the US – the market with the lowest level of interest in climate change news – the gap between those on the political left and right is 41pp, with low interest among those on the right driving down the overall interest figure.

PROPORTION INTERESTED IN CLIMATE CHANGE NEWS – ALL MARKETS

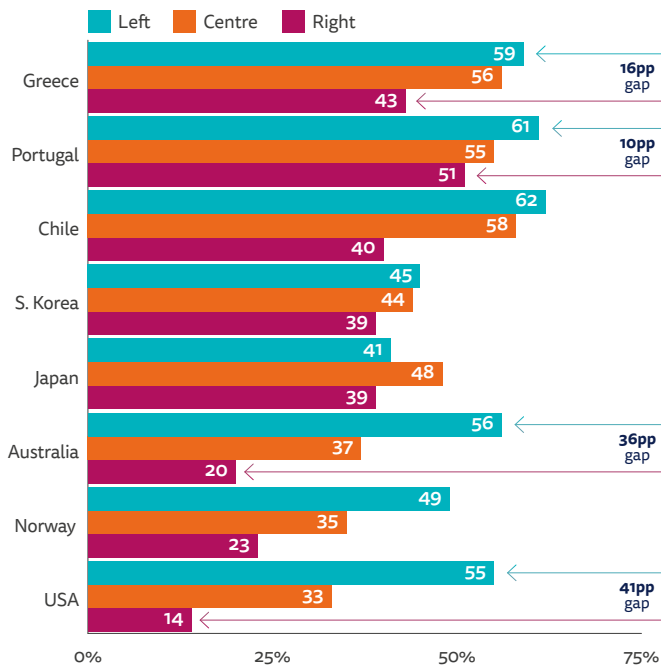


Q1d_2022. Which of the following types of news, if any, are you interested in? Base: Total sample in each market (n = 2,000).

²⁶ <https://www.digitalnewsreport.org/survey/2020/how-people-access-news-about-climate-change/>

On the other hand, in markets with the highest levels of interest, there is less left-right polarisation. We can see this dynamic play out in Greece and Portugal. In Greece, the difference in the proportion of people on the political left versus right who are interested in climate change news is only 16pp, while in Portugal it is just 10pp.

PROPORTION INTERESTED IN CLIMATE CHANGE NEWS - BY POLITICAL LEANING - SELECTED MARKETS



Q1d_2022. Which of the following types of news, if any, are you interested in? Q1f. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? Base: Left/Centre/Right: Greece = 272/1137/189, Portugal = 513/832/257, Chile = 261/977/192, South Korea = 373/1277/260, Japan = 65/1249/140, Australia = 390/1035/298, Norway = 385/1082/296, USA = 459/778/498.

Another influence on our figures may be the impacts of climate change itself. Many countries have witnessed extreme weather events linked to climate change; Greece and Portugal, for instance, have suffered from devastating wildfires in recent years, and Chile continues to suffer from severe drought, which has made climate change 'easy to see'.²⁷ It may be that audiences are more interested in news about the topic when they are not so polarised and can clearly see the negative effects of extreme weather where they live.



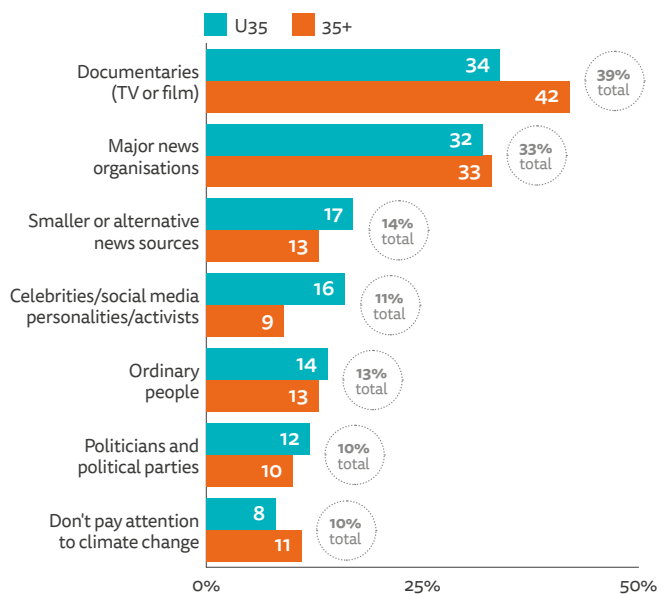
A cow is seen on land that used to be filled with water, at the Aculeo Lagoon in Paine, Chile January 9, 2019. REUTERS Rodrigo Garrido.

SOURCES OF CLIMATE CHANGE NEWS

Beyond interest, we can examine the sources people say they pay most attention to for climate change news. Overall, across the markets we cover, more people say they pay attention to documentaries (39%) than to major news organisations (33%) for information about this topic. This is the case across all markets in the aggregate, as well as across age groups.

This disparity between the use of documentaries and major news organisations for climate change news is also the case across many individual markets. In Greece, for instance, there is a large gap in the proportion of people paying attention to documentaries (55%) versus major news organisations (35%). Exceptions to this trend are markets like Japan, where larger proportions of people say they pay attention to major news organisations (41%) than documentaries (27%). But, more often than not, respondents across most markets say that documentaries draw their attention.

PROPORTION WHO PAY ATTENTION TO EACH SOURCE FOR CLIMATE CHANGE NEWS - BY AGE - ALL MARKETS



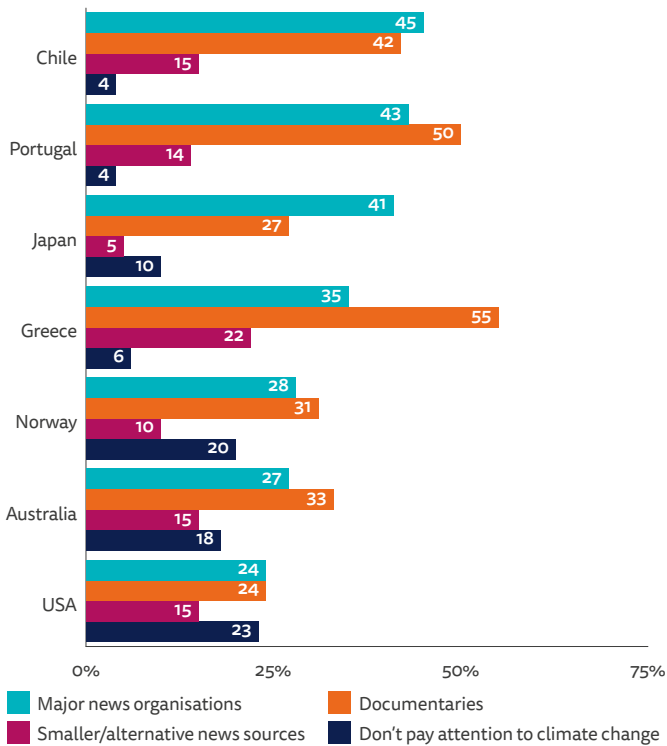
C1_2022a. When it comes to climate change news, which of the following sources, if any, do you pay most attention to? Please select all that apply. Base: U35/35+ in all markets = 28,001/65,431. Total sample in all markets = 93,432. Note: Attention to 'scientists/experts/academics' as a source was asked but data excluded as they are mostly accessed via other sources.

It may be that films and television shows, from Al Gore's 2006 *An Inconvenient Truth* – which drew global attention to climate change – to the numerous nature documentaries produced since then by the BBC (e.g. *Blue Planet II*), Netflix (e.g. *Seaspiracy*), and Disney+ (e.g. *Elephant*), pack a bigger punch and remain more memorable to people than daily news reports. These are films and television series which, while not always about climate change, combine stunning visuals with compelling storytelling and environmental messages, reaching millions of people. Netflix says its series *Our Planet*, narrated by Sir David Attenborough, pictured right, has reached 100m households since its release in 2019.²⁸ While some documentaries have been criticised for their accuracy,²⁹ the emotive power of these films certainly seems to resonate with audiences. Their popularity here is also further evidence of the importance of TV in driving attention to climate change information – something we noted in 2020.



²⁷ <https://www.reuters.com/world/americas/chiles-record-breaking-drought-makes-climate-change-very-easy-see-2021-08-10/>
²⁸ <https://about.netflix.com/en/news/net-zero-nature-our-climate-commitment>
²⁹ <https://www.theguardian.com/environment/2021/mar/31/seaspiracy-netflix-documentary-accused-of-misrepresentation-by-participants> and <https://www.independent.co.uk/voices/bbc-david-attenborough-nature-documentaries-fake-a8291961.html>

PROPORTION WHO PAY ATTENTION TO EACH SOURCE FOR CLIMATE CHANGE NEWS – SELECTED MARKETS



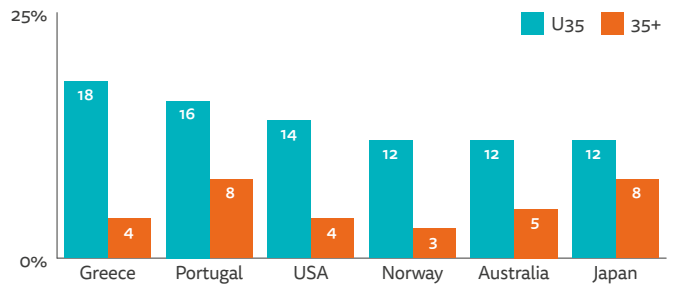
C1_2022a. When it comes to climate change news, which of the following sources, if any, do you pay most attention to? Base: Total sample in each market (n = 2,000).

When we drill down into the attention paid to major news organisations, we find that usage for climate change news is lower in markets where interest and attention are polarised, such as the US and Australia. In these markets, along with Norway, we see the largest proportions of people saying they don't pay attention to climate change at all, with these high figures largely being driven by those on the political right. Half (49%) of those on the political right in the US say they don't pay attention to climate change at all, and it is a third in Australia (34%) and Norway (31%). This compares to just 5% of those on the political right in Portugal and Chile who say they don't pay attention.

Indeed, the comparisons between the US, Australia, and other markets are stark, showing the role that polarised politics – and media coverage – can play in driving down interest in and attention to climate change as an issue. Attention to sources across the board is low in both the US and Australia despite the visible effects of climate change witnessed in both countries in recent years. In contrast, countries like Greece and Chile do not appear to suffer from the same levels of audience polarisation and see higher rates of attention.

Finally, there are also interesting differences in attention to sources by age. Respondents under 35 in many markets are often two or three times more likely to say they pay attention to celebrities, social media personalities, or activists for climate change news than people over 35. So-called 'green influencers' have amassed large followings online, drawing attention to the linkages between climate change and social justice issues. They include Vanessa Nakate, a climate activist from Uganda with hundreds of thousands of followers across Twitter and Instagram; Jack Harries, an environmentalist YouTuber whose channel has 3.7m subscribers; and Jerome Foster, a young climate activist who is a White House adviser with over 41,000 Instagram followers.

PROPORTION WHO PAY ATTENTION TO CELEBRITIES, SOCIAL MEDIA PERSONALITIES, OR ACTIVISTS FOR CLIMATE CHANGE NEWS – BY AGE – SELECTED MARKETS



C1_2022a. When it comes to climate change news, which of the following sources, if any, do you pay most attention to? Please select all that apply. Base: U35/35+. Greece = 468/1536, Portugal = 462/1549, USA = 668/1368, Norway = 496/1514, Australia = 561/1477, Japan = 406/1609.

Groups like the EcoTok collective on TikTok also seek to connect with the younger audience on the platform. Younger respondents are also somewhat more likely to say they get climate change news from smaller or alternative news sources, some of which have been started by young climate activists.

COVERAGE OF CLIMATE CHANGE

Audiences appear to be more interested in and pay more attention to climate change news in places where the negative effects are felt more acutely. But it is arguably too late if audiences only pay attention once disasters have already struck. A central challenge is how to cover the issue in a way that draws attention to the causes and decisions that lead to disasters, not 'just' the disasters themselves.

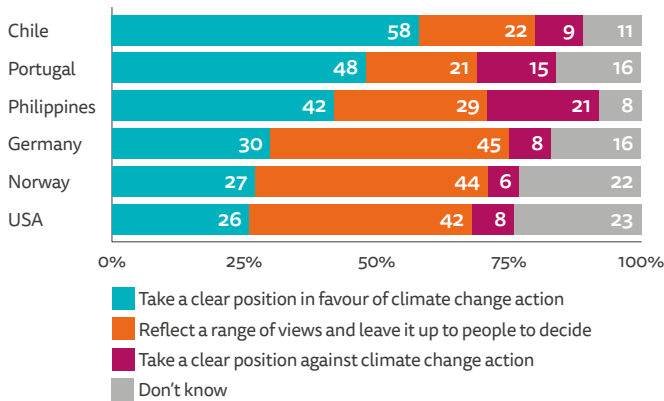
One approach to this is taking a clearer stance on the issue, as exemplified by the *Guardian* calling for more action on the 'climate crisis' and many documentaries that take a clear activist stance on environmental issues. But how do audiences feel about news outlets adopting a position?

We find that, in general, there are strong regional differences in views. These reflect similar patterns to those already identified in this chapter: audiences in Latin America, Southern Europe, and several markets in Asia-Pacific are more open to news outlets taking a stand in favour of climate change action. Large proportions of respondents in Chile (58%), Portugal (48%), and the Philippines (42%) say that journalists should advocate for change. On the other hand, pluralities in Northern European, Western European, and North American markets favour impartiality. Respondents in Germany (45%), Norway (44%), and the US (42%) say they would prefer news outlets to reflect a range of views and leave it up to them to decide what to think (see chart next page).

Examining these trends, it may be that audiences in markets such as Norway and Germany are predisposed to expect an impartial approach to reporting – particularly from public broadcasters. On the other hand, political polarisation may again be playing a role.

In many markets, large majorities of those on the political right want journalists to remain impartial on climate change and their views drive some of the overall trends. The proportion of those on the right favouring impartiality is 60% in Norway and 69% in the US. Conversely, those on the political left tend to favour journalists advocating for climate change action. Views in Chile and Portugal are not as polarised on this question, with both those on the political left and right favouring climate action.

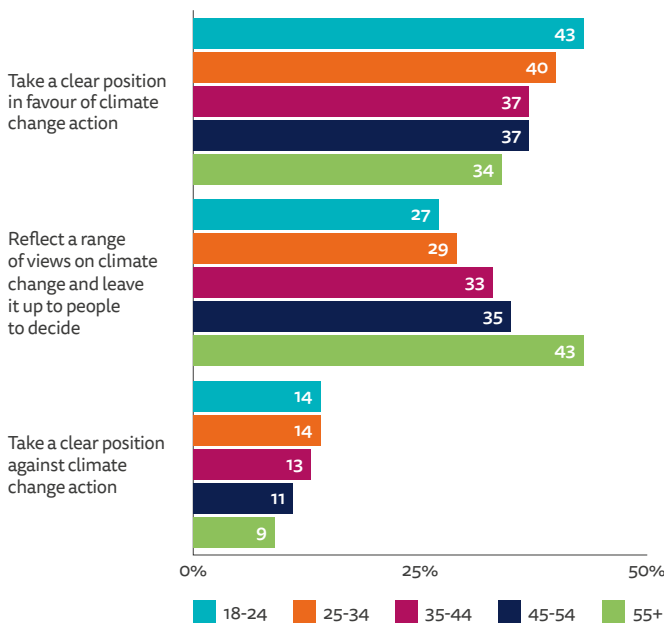
PROPORTION WHO THINK NEWS OUTLETS SHOULD TAKE A STAND WHEN COVERING CLIMATE CHANGE – SELECTED MARKETS



QAdvocacy_2022. Thinking about the way news outlets cover climate change, which of the following statements best describes your view? News outlets should... Base: Total sample in each market (n = 2,000).

Notably, these polarised views on impartiality are reflective of trends we identified in the *Digital News Report 2021* where, on the question of impartiality, audiences split by their political views. They also split by age, and the same is true this year: younger people are more likely to think news outlets should take a clear position in favour of climate change action. Across all markets, 43% of those aged 18–24 think this, compared to just 34% of over 55s. Those over 55 instead favour news outlets taking an impartial position.

PROPORTION WHO THINK NEWS OUTLETS SHOULD TAKE A STAND WHEN COVERING CLIMATE CHANGE – BY AGE – ALL MARKETS



QAdvocacy_2022. Thinking about the way news outlets cover climate change, which of the following statements best describes your view? News outlets should... Base: 18-24/25-34/35-44/45-54/55+: 11,304/16,862/17,205/15,074/32,987.

CONCLUSIONS

Our findings show that trends around climate change news are driven by factors such as politics, age, and the impacts of climate change itself. Interest in and attention to climate change, as a news topic, is much more politically polarised in some countries than others, with many of those on the political right tuning out. Conservative politicians and alternative media have played key roles in this. For newsrooms, the difficult question is how to engage this critical segment of the audience, particularly if conservatives view climate change as a politicised issue of the 'left' and disfavour newsrooms taking a stand.

Are there other steps journalists can take to make climate change stories feel more relevant? Perhaps lessons could be learned from the wide appeal of many environmental documentaries, which provide clear stories and engaging visuals. These narratives help audiences connect with what is a very large and sometimes abstract story – while not necessarily being 'political'. But at the same time, some documentaries have been accused of selectively using facts, and a 'slick-but-lacking-substance' approach may backfire among those not already convinced. Yet there is always room for better storytelling.

But what about taking a more active stance? Among those on the political left, while they are more interested and engaged, there is still a large proportion in most markets who do not express interest in climate change news and who are not paying attention to major news organisations. For this audience, taking a clearer stance may be one way to increase interest or attention, but doing so risks running up against journalistic norms of impartiality adopted in many countries.

In the UK, the *Guardian* has taken a stand and this may win the favour of younger (and left-leaning) audiences who are more inclined to want this. Engaging younger audiences on this issue means reaching them with accurate and compelling stories in the digital spaces they occupy – where influencers and activists make calls to action. At the same time, taking a clear stand may risk further alienating already disengaged audiences, further entrenching divisions around the issue.

What seems apparent, however, is that audiences express more interest, pay more attention to climate change news, and feel more inclined to support journalists taking a stand in places where the direct impacts of climate change are acutely felt. But if the very visible manifestations of climate change – fires, floods, and droughts – are what draw attention, this raises a problem in itself. Action – and, therefore, credible information to inform it – is needed before disaster. Yet long-term trends, future unseen risks, and the scientific complexities of climate change are harder to engage audiences with, especially when other immediate crises, from inflation to war in Ukraine, are on the doorstep. Climate change is a difficult news topic to cover and it is not clear that there is a one-size-fits-all approach to it.

3



SECTION 3

Analysis by Country and Market

In this section we publish a *market-based* view of the findings, which includes an overview of the most important data points in terms of news.

These include an overview of consumption in each market, including details of the most popular news brands – traditional and online. The pages also contain statistics about the use of devices such as smartphones and tablets and the role of different social networks for news. Information is drawn from the 2022 Digital News Report survey using the methodology outlined on p.6, with the exception of population and internet levels which are drawn from the latest edition of *Internet World Statistics*.³⁰

Data from India, Kenya, Nigeria, and South Africa are representative of younger English speakers and not the national population, because it is not possible to reach other groups in a representative way using online polling. The survey was fielded in English in these markets (respondents had the option of selecting Hindi in India and Swahili in Kenya, but the majority selected English), and restricted to ages 18–50 in Kenya and Nigeria.

In some other markets, where internet penetration is lower, our data often represent younger and more affluent groups – even if it meets other nationally representative quotas. For all these reasons, one should be cautious in comparing some data points across markets where we know these limitations apply (see methodology). In a few markets we do not show certain data points (such as paying for news) because we feel these could lead to misunderstandings or misleading comparisons. We have also signalled specific details about samples in a short note on the relevant page and also include the internet penetration rate on each.

We have ordered the countries and markets by geography (Europe, Americas, Asia-Pacific, and Africa) and within each region countries are then ordered alphabetically – with the exception of the UK at the start of the Europe section and the United States at the start of the Americas.

EUROPE

3.01	United Kingdom	62
3.02	Austria	64
3.03	Belgium	66
3.04	Bulgaria	68
3.05	Croatia	70
3.06	Czech Republic	72
3.07	Denmark	74
3.08	Finland	76
3.09	France	78
3.10	Germany	80
3.11	Greece	82
3.12	Hungary	84
3.13	Ireland	86
3.14	Italy	88
3.15	Netherlands	90
3.16	Norway	92
3.17	Poland	94
3.18	Portugal	96
3.19	Romania	98
3.20	Slovakia	100
3.21	Spain	102
3.22	Sweden	104
3.23	Switzerland	106
3.24	Turkey	108

AMERICAS

3.25	United States	112
3.26	Argentina	114
3.27	Brazil	116
3.28	Canada	118
3.29	Chile	120
3.30	Colombia	122
3.31	Mexico	124
3.32	Peru	126

ASIA PACIFIC

3.33	Australia	130
3.34	Hong Kong	132
3.35	India	134
3.36	Indonesia	136
3.37	Japan	138
3.38	Malaysia	140
3.39	Philippines	142
3.40	Singapore	144
3.41	South Korea	146
3.42	Taiwan	148
3.43	Thailand	150

AFRICA

3.44	Kenya	154
3.45	Nigeria	156
3.46	South Africa	158

³⁰ <https://www.internetworldstats.com/>

3



SECTION 3

Analysis by Country and Market

Europe

EUROPE

3.01	United Kingdom	62
3.02	Austria	64
3.03	Belgium	66
3.04	Bulgaria	68
3.05	Croatia	70
3.06	Czech Republic	72
3.07	Denmark	74
3.08	Finland	76
3.09	France	78
3.10	Germany	80
3.11	Greece	82
3.12	Hungary	84
3.13	Ireland	86
3.14	Italy	88
3.15	Netherlands	90
3.16	Norway	92
3.17	Poland	94
3.18	Portugal	96
3.19	Romania	98
3.20	Slovakia	100
3.21	Spain	102
3.22	Sweden	104
3.23	Switzerland	106
3.24	Turkey	108

UNITED KINGDOM



The UK media scene is characterised by a well-funded and regulated broadcasting sector and a lively and opinionated national press. But audiences are fragmenting with the rise of streaming services and some new TV channels looking to shake up the industry. Meanwhile public broadcaster Channel 4 is to be sold off and the BBC is facing new threats to its future in its centenary year.

Both news consumption and trust have dipped over the last year, partly reversing strong gains witnessed by many news brands during the COVID-19 crisis. Exhaustive news coverage of parties in Downing Street, held at a time of lockdown restrictions, heaped pressure on Prime Minister Boris Johnson, but the wall-to-wall attention may have alienated those outside the Westminster bubble. In our survey, almost half our sample (46%) say they avoid the news sometimes or often – almost twice the level seen in 2016 – with many citing ‘too much news about politics and COVID-19’ as a reason.

Trust in the news is down by 16 percentage points (pp) since the Brexit referendum in 2016 (see chart right) amid increasingly polarised debates about politics and culture. The BBC has come under criticism from both left and right over perceived bias in its news coverage, with our data showing over a quarter (26%) have little trust in the news brand compared with 11% in 2018. Senior correspondents have suffered physical attacks offline, along with personal abuse on social media, while some BBC veterans have left for rival broadcasters that are able to offer more freedom, money, or both.³¹

Staff morale has not been helped by repeated attacks from a hostile government, which argues that the BBC has a problem with ‘left-leaning group-think’.³² In January, the government froze the current level of the licence fee, at a time when inflation was running at 7%, adding to budget pressures after a decade of real-term cuts. It also suggested that the current charter agreement, which ends in 2027, could be its last. In response the BBC has announced plans to close a number of broadcast services to focus more on online streaming. It is also merging its global and domestic rolling TV news channels.

The government has announced plans to sell Channel 4, the publicly owned but commercially funded broadcaster founded nearly four decades ago as an edgy alternative to the BBC and ITV.

A new commercial challenger comes in the shape of Talk TV, part of an attempt by Rupert Murdoch to shake up news broadcasting. The channel, which launched in April 2022, includes a flagship show hosted by Piers Morgan, who specialises in big name celebrity interviews but has run into trouble with the broadcast regulator Ofcom in the past over his controversial comments. The UK’s tradition of impartial broadcast news had already faced pressures from GB News, which shifted further to the right following its troubled launch last year, hiring former UKIP leader Nigel Farage as a prime-time presenter. Our data show that the channel is building a small but significant right-leaning audience (5% weekly audience on TV and 3% online). Meanwhile Ofcom has been flexing its muscles over the conflict in Ukraine, revoking Russian state-backed news channel RT’s licence to broadcast after government ministers and others called for investigations into the ‘due impartiality’ of its coverage. Ofcom will be taking on the extra role of internet watchdog this year when new online harms legislation is expected to give it powers to fine social media companies that do not protect users from harmful content.

National newspapers have continued to diversify business models with a greater focus on online subscription, registration, and membership. The *Telegraph* has amassed more than 500,000 digital subscribers, followed by *The Times* and *Sunday Times* with around 400,000,³³ partly boosted by the war in Ukraine.³⁴

Population	67m
Internet penetration	95%

In March, the *Financial Times* announced it had reached 1m digital subscribers, with more than half coming from outside the UK.³⁵ Looking to make its journalism more accessible, it launched a low-cost free-standing mobile app with a hand-picked selection of articles, FT Edit.

Meanwhile, the *Guardian* says over a million people are now regularly paying for its online journalism via a combination of subscription to their apps and recurring donations, with about half its subscriber base now coming from outside the UK. Even so, only a minority of our survey respondents (9%) currently pay for any online news, with a wide range of free content widely available. Meanwhile local and regional publishers continue to struggle to persuade customers to pay for online, but benefited from stronger than expected digital advertising revenues in 2021. Despite this, in a bid to reduce costs, some publishers have been shutting the majority of their physical offices and adopting new remote and hybrid working. Newsquest’s acquisition of Archant, one of the UK’s oldest regional publishers, in March 2022, has further consolidated ownership in the sector and increased fears of further job losses.

Nic Newman

Senior Research Associate, Reuters Institute for the Study of Journalism

³¹ <https://www.theguardian.com/media/2022/feb/22/emily-maitlis-and-jon-sopel-leaving-bbc-to-front-new-podcast-lbc>

³² <https://www.telegraph.co.uk/news/2021/01/14/bbc-culture-must-rebuilt-avoid-liberal-groupthink-says-new-chairman/>

³³ <https://corporate.telegraph.co.uk/2022/02/17/telegraph-media-group-subscription-numbers-february-17-2022/>

³⁴ <https://pressgazette.co.uk/times-ukraine-coverage-digital-subscribers>

³⁵ <https://digiday.com/media/how-the-ft-got-to-1m-digital-subscribers-qa-with-commercial-chief-jon-slade/>

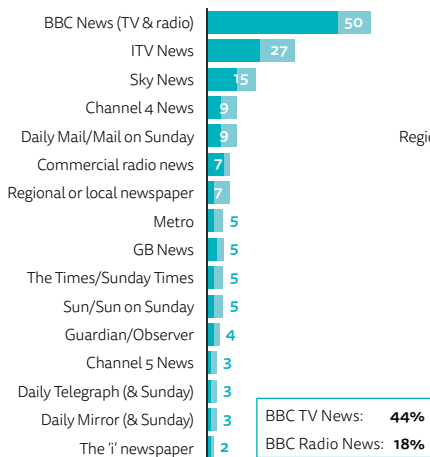
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

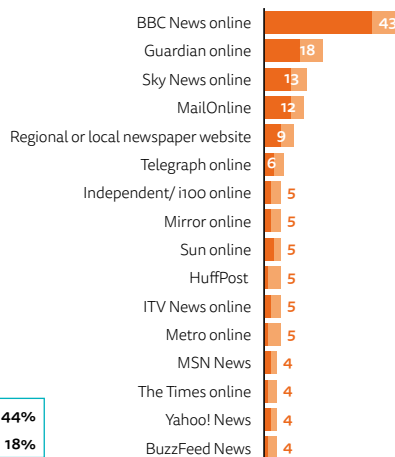
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE



CHANGING MEDIA

Audiences for traditional news sources like TV and print have fallen significantly over the last decade, with younger groups preferring to get their news online or via social media. After last year's COVID-19 bump, overall news consumption is down across all devices.

9%



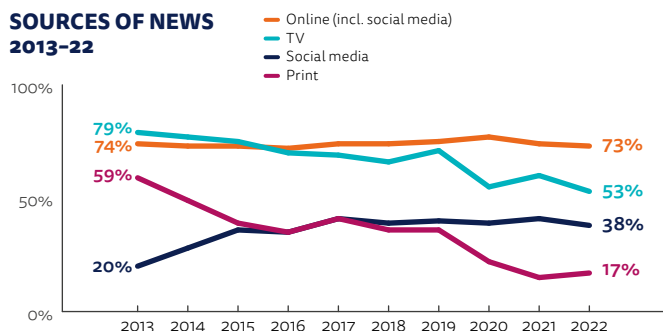
pay for **ONLINE NEWS**

25%

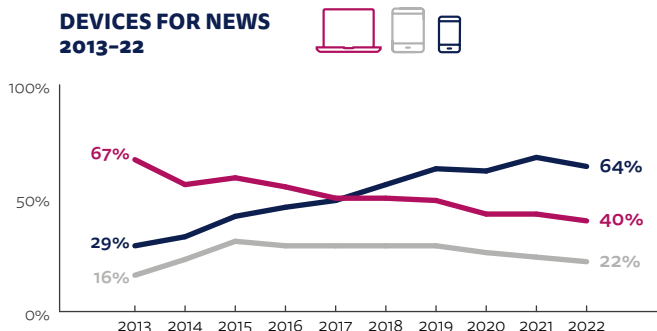


listen to **PODCASTS** in the last month

SOURCES OF NEWS 2013-22



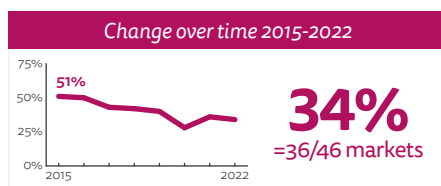
DEVICES FOR NEWS 2013-22



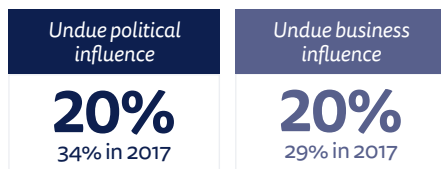
TRUST

Public broadcasters such as the BBC, ITV, and Channel 4 remain the most trusted news brands. Popular outlets such as the Sun, the Mail and the Mirror attract big audiences online but their news coverage is often strongly distrusted. New TV channel GB News is struggling to build trust with general audiences even as it builds loyalty with some on the right.

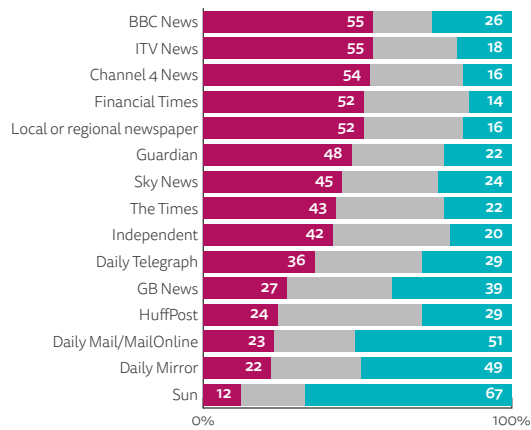
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

21%



SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	19% (-4)	62%	4	YouTube	9% (-1)	54%
2	Twitter	13% (-3)	28%	5	Instagram	6% (+1)	36%
3	WhatsApp	10% (-4)	66%	6	Facebook Messenger	4% (-3)	43%

AUSTRIA

Trust in news and in Austrian news brands are both down significantly this year, partly due to the influential role of tabloid newspapers in a scandal that forced the resignation of Chancellor Sebastian Kurz. The media are also blamed for increasing polarisation about COVID vaccines and lockdown measures.

In an exceptionally turbulent political year, disagreements around measures to contain the COVID-19 pandemic shaped the political debate. The government's proposal to introduce compulsory vaccination for all adults from early 2022 was strongly contested by opposition parties and anti-vax movements, before finally being abandoned. As protests grew, the Ministry of Interior warned media organisations about increasing incidents of intimidation, threats, and violence towards journalists.

The 'Austrian Corona Panel Project' by the University of Vienna found a significant correlation between frequent access to particular television news brands and people's attitudes. In particular, regular viewers of right-wing leaning channels Servus TV and oe24.tv were more likely to be sceptical about the seriousness of the virus, critical of measures to contain COVID's spread, or to believe in conspiracy theories, than non-viewers. In contrast, regular viewers of the public service media ORF were more likely to be vaccinated than non-viewers – and were encouraged to do so by the channel.

The political turmoil that led to the fall of Chancellor Sebastian Kurz of the Austrian People's Party (ÖVP) followed allegations that he won the support of tabloid papers, in particular of Mediengruppe Österreich, in exchange for granting them generous public advertising contracts. These tabloids were blamed for playing a key role in publicising a rigged government-funded opinion poll that suggested widespread public support for the 2017 reforms within the Austrian People's Party that crowned Kurz as the leader, and later, as the country's Chancellor. The revelations highlighted the sometimes-murky relationship between politicians and newspapers in a country where print

remains both unusually influential and dependent on government advertising.

Despite the political scandal around them, commercial media received increased amounts of central government public advertising during the pandemic, amounting to €47m in 2020 and €45.3m in 2021. Large tabloids including *Österreich*, *Kronen Zeitung*, and *Heute* received about half the 2020 figure.³⁶

Some media are succeeding with pay strategies including paywalls, metered paywalls, and online subscriptions. The 14% who pay for news online represents a 2pp increase on last year, up from 8% in 2018, with our respondents mentioning *Kleine Zeitung* and *Kurier* most frequently. *Kronen Zeitung* remains the largest daily newspaper both according to our survey, and the leading domestic 'Media-Analyse' report. This confirms continuing high print newspaper readership in Austria, reporting that 4.3m readers, well over half the adult population, bought daily printed or digital newspapers, in the year mid 2020–2021.

Sebastian Kurz was forced to resign in October 2021 along with many of his closest allies and Karl Nehammer, (also from the ÖVP) then took over as Chancellor in December. The subsequent creation of a separate Ministry for Media Affairs marked a break from the tradition of media policy being run from the Chancellor's office but it remains to be seen whether it reduces the ruling party's influence over the media.

The longstanding ORF Director General, Alexander Wrabetz, was not reappointed after 15 years and the choice by the ORF Board of Trustees of Roland Weißmann as his successor was seen as being influenced by the ruling party. The Audience Council



Population	9m
Internet penetration	88%

of the ORF approved an 8% licence fee increase, to €219 per household.

Google launched its News Showcase in Austria in July and chose seven brands to represent a mixture of local, regional, and national news organisations providing high-quality content. The brands receive funding through the scheme. The amount per title or indeed for Austria has not been divulged, though it is thought to be less than existing national subsidies.³⁷

Commercial media start-ups include Pragmaticus, a monthly magazine and online news outlet financed by Red Bull owner Mateschitz with Prince Michael of Liechtenstein, and Zur Sache, a digital news website explicitly linked to the Austrian People's Party ÖVP. The new online daily Exxpress markets itself as an 'upmarket tabloid', but received a complaint from Austrian Public Prosecutors for an article which included the home addresses of both Florian Klenk, Editor-in-Chief of the left-liberal magazine *Falter*, and the prosecutor leading the investigation against Sebastian Kurz.

Sergio Sparviero and Josef Trappel
University of Salzburg, in collaboration with
Stefan Gadringer, Roland Holzinger, and Karin Kuzmanov

³⁶ <https://www.derstandard.at/story/2000134119673/werbung-oeffentlicher-stellen-2021-auf-neuem-hoechststand-225-millionen-euro> The total value of public advertising including Central and Regional governments and other public bodies rose from €223m in 2020 to €225m in 2021.

³⁷ <https://blog.google/products/news/google-news-showcase-launching-austria/>

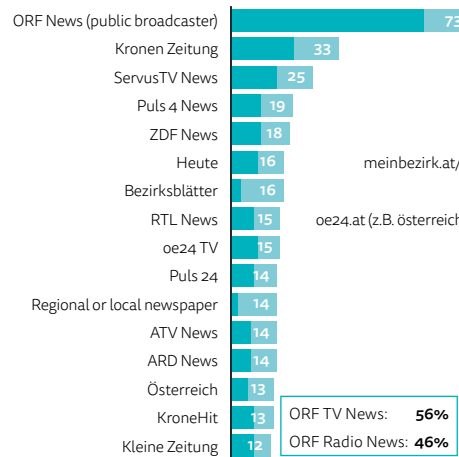
WEEKLY REACH OFFLINE AND ONLINE

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ONLINE

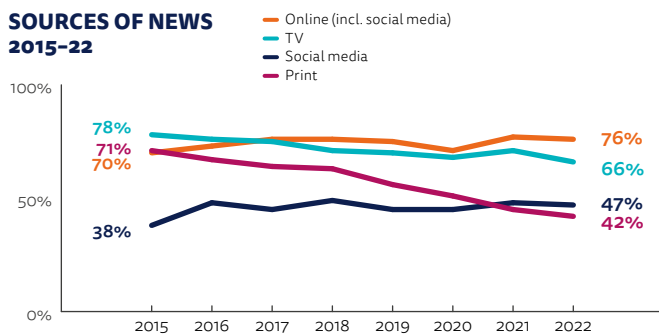


CHANGING MEDIA

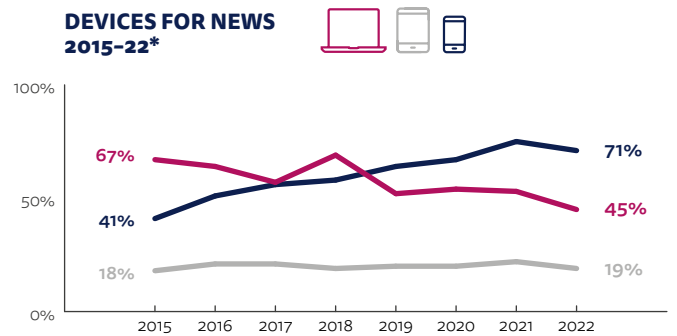
Declining interest and frequency of access affected all news sources. Television continued its long-term decline with a 5pp drop since 2021. Use of newspapers declined but at 42% remains the second highest (after India) across all our 46 countries surveyed.



SOURCES OF NEWS 2015-22



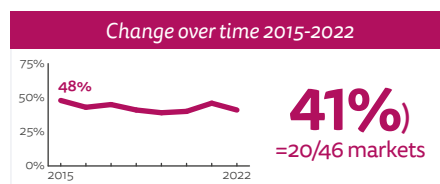
DEVICES FOR NEWS 2015-22*



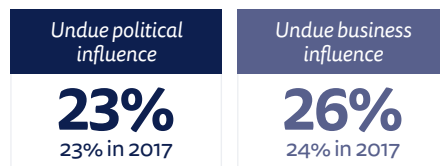
TRUST

Our data shows low and declining trust in news overall for all key brands as well as a low proportion who think the media are independent from political or business or commercial influence. The scandal about government advertising contracts may explain why 20% responding to a Gallup survey believed it possible to 'buy' favourable contributions from Austrian commercial media.

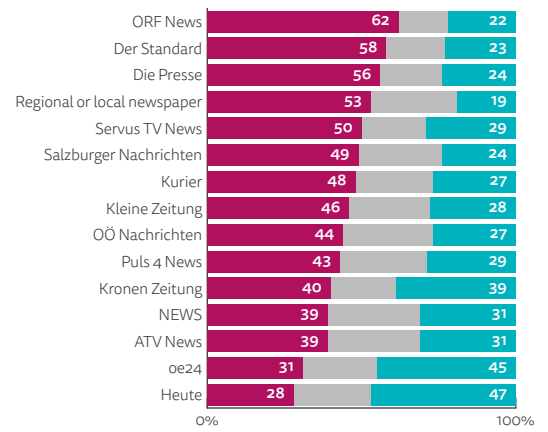
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TOP SOCIAL MEDIA AND MESSAGING

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3	YouTube	22% (+1)	64%	6	Facebook Messenger	6% (+1)	28%

BELGIUM

Belgium has two distinct media markets: French-speaking Wallonia and Flemish-speaking Flanders. Publishers' pivot to digital subscriptions seems to be paying off, but they continue to look for scale and diversification of revenues through mergers and acquisitions.

In 2021, the COVID-19 pandemic continued to spark interest in reliable news in Belgium. The ensuing increase in digital subscriptions reported by all the main news organisations in combination with the advertising market recovering sooner than expected left the Belgian news market in a good position. The large Belgian news corporations continued to expand their activities in various, increasingly successful ways. But other parts of the news sector have been in a state of flux in recent years and have not yet stabilised.

Mediahuis, one of Flanders' largest publishers, became a billion-dollar company after it acquired NDC Media group in the Netherlands, Aachener Verlagsgesellschaft in Germany, and the main Luxemburg news publisher, thus increasing turnover by 14%. Mergers, cost reductions, and collaboration across printing, distribution, and technology are seen as key to successful digital strategies. As Mediahuis CEO Gert Ysebaert stated during the take-over: 'The reality is that either you increase scale or you focus on a niche. A position in between is no longer really possible.'

In 2021, Mediahuis rode the wave of digital subscriptions, successfully introducing conversion strategies to newly acquired brands that had previously struggled to increase revenues. Mediahuis shared in a general increase in sales of Flemish newspapers (print and digital) in 2020. The greatest were at *De Morgen* (+23%), *De Tijd* (+9%), and *De Standaard* (+8%), and digital subscriptions accounted for more than half the sales of *De Morgen* and *De Tijd*, and around 40% of those by *De Standaard*. Interestingly the most popular titles, *Het Laatste Nieuws* and *Het Nieuwsblad*, have seen falling print revenues made up by digital subscriptions.³⁸ Early 2021 figures suggest these trends continue, at least for *Het Laatste Nieuws* and *De Morgen*.

Meanwhile in Wallonia, publisher Rossel succeeded in taking over broadcaster RTL Belgium in a joint venture with DPG Media, the other major Flemish publisher, both strengthening their position in Belgium. The deal creates a Belgian advertising giant that is unrivalled with RTL Belgium, Rossel Group, and DPG Media together holding 41% of the broadcast and print advertising market, with 52% in radio and 59% in TV.³⁹ Wallonia's other large publisher, IPM, also expanded into broadcasting with a majority stake in the 24-hour TV news channel LN24. As in Flanders, the expansion of these two major Wallonian publishers occurred following some, albeit more modest, growth in digital subscriptions. *Le Soir* (Rossel) and *La Libre* (IPM) increased overall sales by 13% and 14% respectively. *Le Soir* is now the leading newspaper in Wallonia, and now has more digital than print subscribers (Laloux 2021). Increases in digital subscriptions across Belgium at the brand level are reflected in our data showing that 19% of Belgians now pay for online news, a 3pp increase.

Alongside successful mergers, diversification, and subscription strategies, digitalisation continues to 'count its casualties'. The Roularta Media Group closed its free regional newspaper *De Streekkrant* and DPG is closing a state-of-the-art print facility built only 15 years ago. Meanwhile, newsroom integration continues at national and local level. What these industry moves and mergers mean for journalists is of increased concern to journalism organisations. In their annual review, the Flemish Association of Journalists mentions increasing pressures on individual journalists, giving as examples layoffs due to changing editorial strategies and commercial pressures related to audience metrics and branded content.



Population	11.6m
Internet penetration	94%

However, some legacy news organisations are also using digital to burnish their image and reach new audiences. VRT made a licensing deal with KBC bank to provide financial news in the bank's mobile app and, in June 2021, VRT's daily news bulletin for children, *Karrewiet*, quit Instagram in favour of a TikTok channel which recruited 75,000 followers in three months. In November HLN, the leading Flemish online news brand launched a TikTok channel with a dedicated host and had 205k followers by early 2022. Some political parties are also adapting their communications strategies. The far-right political party Vlaams Belang launched its own news app with the tagline 'Break censorship' and a lawyer affiliated with the anti-vax movement is launching Verso.tv, promising 'news without woke'.

Ike Picone

Associate Professor of Journalism and Media Studies, Vrije Universiteit, Brussels

³⁸ Mediaconcentration in Flanders. 2021 Report. Flemish Media Regulator. <https://www.vlaamseregulatormedia.be/en>

³⁹ 'Rossel and DPG Media Reconfigure the French-Speaking Media Landscape', *De Tijd*, 28 June 2021.

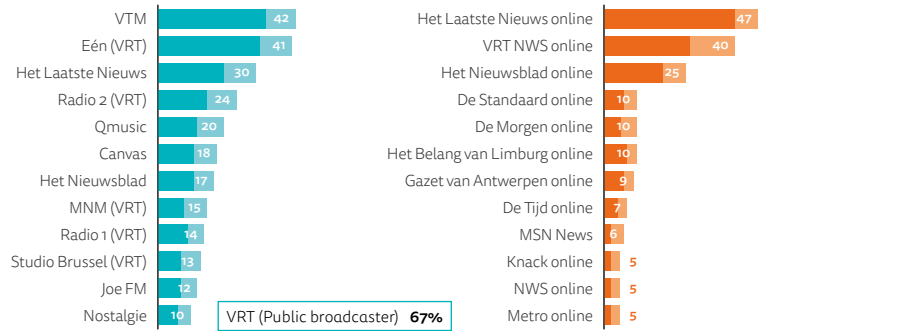
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT (FLEMISH SPEAKING) ONLINE (FLEMISH SPEAKING)



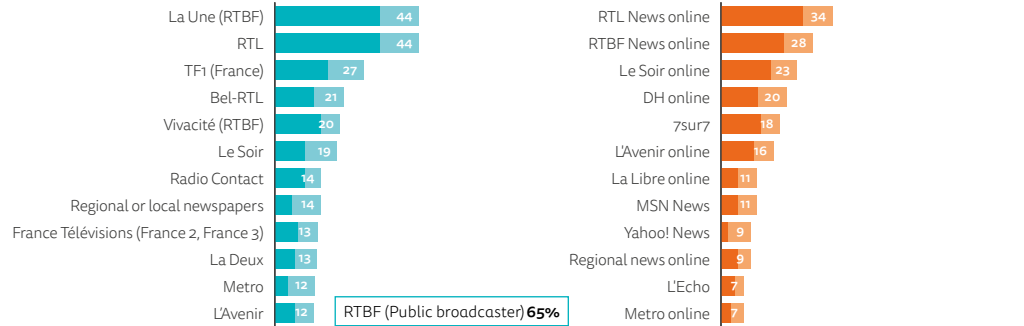
19% pay for **ONLINE NEWS**

Flemish 18% | French 18%

29% listen to **PODCASTS** in the last month

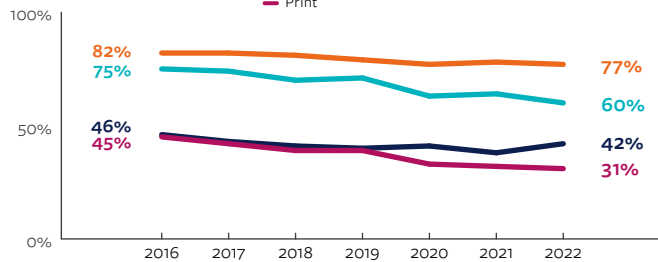
Flemish 28% | French 30%

TV, RADIO AND PRINT (FRENCH SPEAKING) ONLINE (FRENCH SPEAKING)

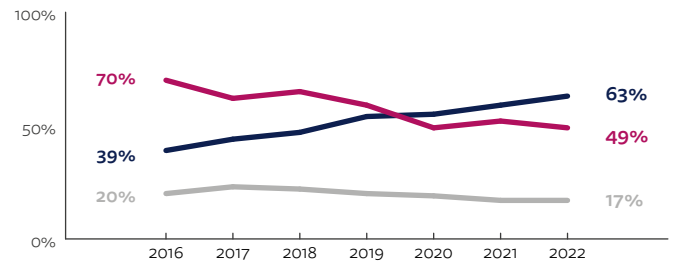


SOURCES OF NEWS 2016-22

- Online (incl. social media)
- TV
- Social media
- Print



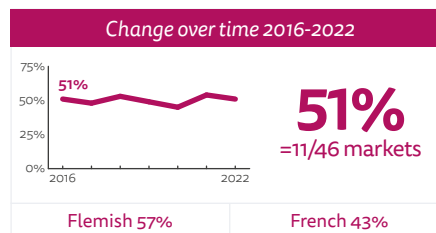
DEVICES FOR NEWS 2016-22



TRUST

Although the trust bump is less pronounced than last year, overall trust in news remains relatively high in Belgium. Flemish-speaking Flanders (57%) and French-speaking Wallonia (43%) continue to feature a significant trust gap. In both markets, the respective broadcasters VRT and RTBF remain the most trusted news sources, even though various commercial organisations feature similarly high trust scores.

OVERALL TRUST SCORE

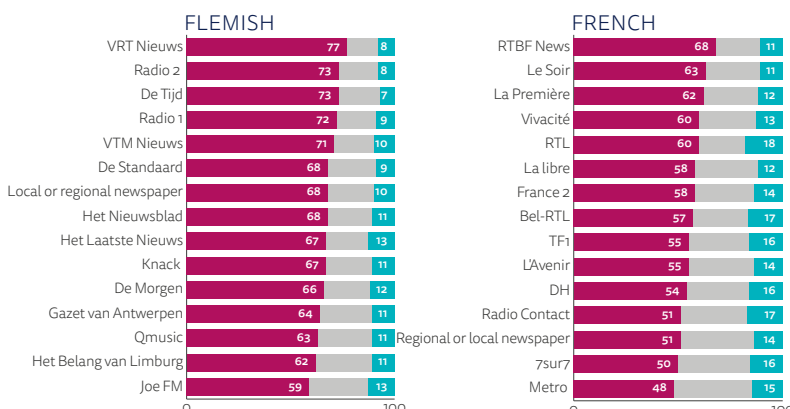


MEDIA IS FREE FROM ...

	Undue political influence	Undue business influence
36%	34% in 2017	36%
Flemish 38%		Flemish 39%
French 34%		French 33%

BRAND TRUST SCORES

- Trust
- Neither
- Don't trust



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	39% (-)	69%
2	YouTube	19% (+1)	53%
4	WhatsApp	16% (+4)	54%
3	Facebook Messenger	14% (+2)	50%
5	Instagram	12% (+3)	35%
6	TikTok	6% (+3)	16%

Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

BULGARIA

2021 witnessed the end of the 12-year term of Prime Minister Boyko Borisov, raising hopes for greater media independence in Bulgaria. But his legacy persists, and the accelerating economic downturn linked to the war in Ukraine heralds a challenging time for the media.

The first of three elections in 2021 ended the rule of former bodyguard Boyko Borisov's centre-right party in April while the third, in November, saw centrist Kiril Petkov's 'We Continue the Change' party come to power. His promise of 'zero corruption' in a country ranked one of the lowest in Europe in the main indices for press freedom and transparency has fuelled hopes of change. One optimistic sign was when Delian Peevski, the oligarch and former media mogul long considered one of the greatest threats to media freedom in Bulgaria, was sanctioned for corruption by the US Department of Treasury in June 2021.⁴⁰ But Borisov makes no secret of his desire to return to power, and his legacy seems to hang over the Bulgarian media.

Only 15% of people in our survey thought the Bulgarian media sector is currently free from undue influence from business or politics, in part because behaviours learned in the Borisov era persist. The public broadcaster Bulgarian National Television (BNT), which was for years seen as a mouthpiece for Prime Minister Borisov, responded to the change in government by switching allegiance overnight. It even changed its schedule recently to remove a documentary because of fears it might hamper bilateral talks between Bulgaria and North Macedonia.

Behaviour of that kind by private companies seems more surprising. When Nova (1st in our offline list) and BTV were bought in recent years by media groups outside Bulgaria there were hopes this might aid independence. With Nova this has largely been the case. But many other media still seem to focus more on their own connections with political power than on watchdog journalism holding power to account. The result is that they provide the

new government with practically unlimited airtime and seem, on occasions, to act like government communication platforms. BTV set a new record when it did 1:1 interviews with the Prime Minister, the Minister of Finance (twice), and two other ministers in just the first fortnight of March 2022.

The economic fragility of the sector may explain the desire of all media owners to stay close to power. The country has the lowest GDP per capita in the European Union and a small and crowded advertising market. While the economy withstood the two years of COVID relatively well, the latest crisis of inflation, frozen public investments, and disruption from the war in Ukraine has affected the media sector badly. The impact is most visible in the decreased amount of prime-time advertising on the main TV channels compared to autumn 2021. In print some publications are preparing for paper shortages and responding by going online-only and a few introduced redundancies and pay cuts. Two newspapers closed.

Most media companies are strengthening their online offer, including increasing the frequency of news updates, expanding their social media presence and moving into podcasts. Podcasts can reach very large audiences, with some funded by advertising or sponsorship, but many rely on direct payment through the crowdfunding/donation platform Patreon. A new online format can also present an opportunity to start with a clean slate in the battle for credibility with an often-sceptical audience. The daily newspapers (now largely online) *Sega* and *Dnevnik*, the Bulgarian Telegraph Agency, and others have all invested in studios, cameramen, and other resources for video broadcasts. People joke in the sector that it is more profitable to launch a video or audio podcast than start a new



Population	7m
Internet penetration	67%

media company and outlets have struggled to find technicians not already taken by podcasters and social media influencers.

This year's survey shows 12% paying for news online – down by three percentage points. This may reflect pressure on household budgets but also the unusual position of TV7/8 which was credited with helping drive subscriptions by offering subscriptions to its ad-free web and TV content for under \$2 a month. But after its founder – the comedian and talk show host Stanislav Trifonov – took his party into Parliament, growth halted, due to fears it would become another media outlet used to serve political goals or simply be neglected due to his inability to dedicate the time and funds required.

Stefan Antonov

Business journalist and former Reuters Institute Journalist Fellow

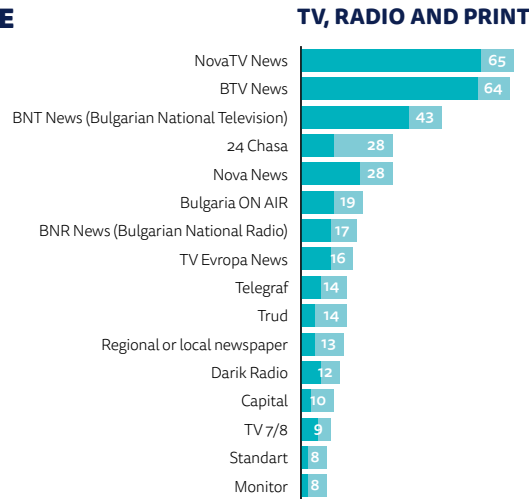
⁴⁰ <https://home.treasury.gov/news/press-releases/jy0208>

WEEKLY REACH OFFLINE AND ONLINE

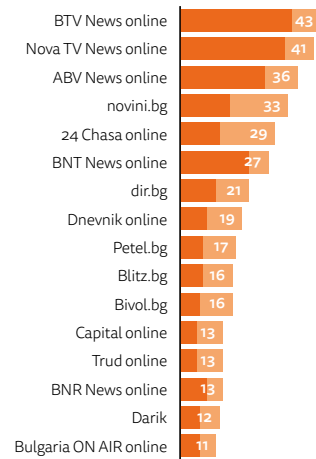
TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



ONLINE

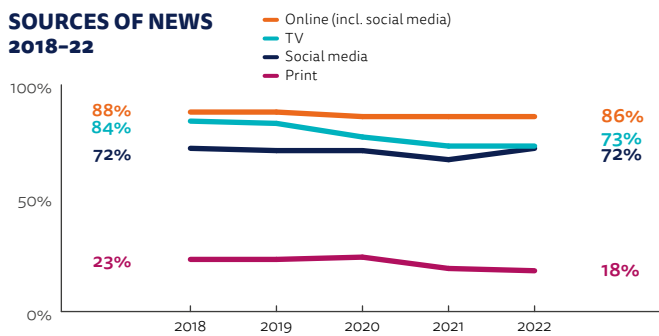


CHANGING MEDIA

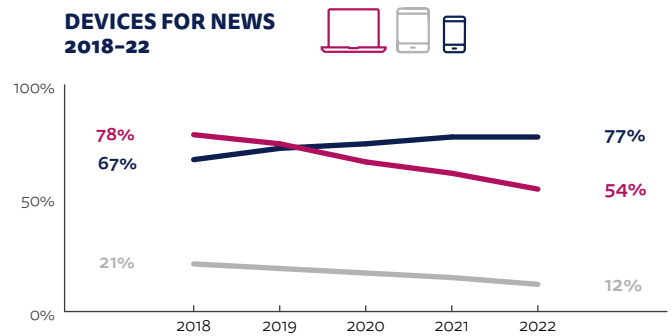
Online remains the leading news source and TV and print's decline continues. The second broadcast brand (BTV) has displaced Nova as the leading source for news online. This may be because BTV offers easier access to video content with less intrusive advertising.



SOURCES OF NEWS 2018-22



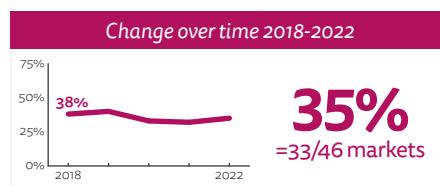
DEVICES FOR NEWS 2018-22



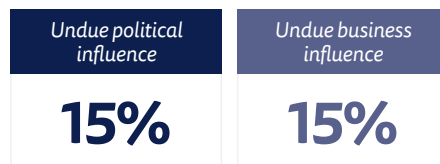
TRUST

Bulgaria continues to have low trust in the media even if this year has seen a slight increase. However, all the top brands (except the 3rd-ranked Darik Radio newly introduced this year) have suffered a loss of trust this year.

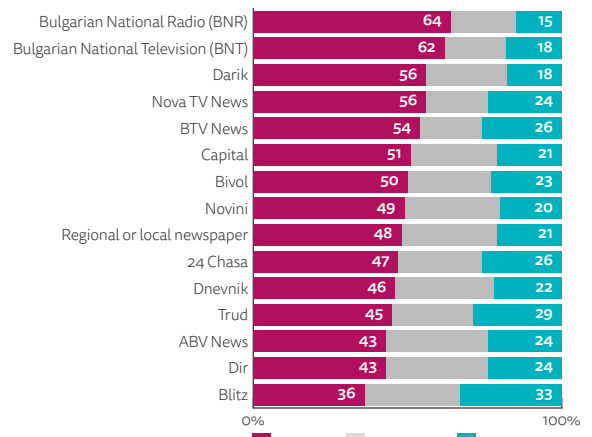
OVERALL TRUST SCORE



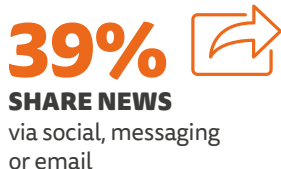
MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	69% (+5)	81%
2	YouTube	34% (+2)	70%
3	Viber	18% (+2)	62%
4	Facebook Messenger	17% (-)	57%
5	Instagram	13% (+1)	36%
6	TikTok	8% (+4)	25%

CROATIA

The Croatian news media are characterised by largely foreign-owned leading TV news channels and legacy news publishers still suffering from the pandemic's impact on advertising revenues. News use and trust have declined after last year's COVID boost. Meanwhile, the biggest media story of the year was the arrest and replacement of the Director General of the PSB HRT.

The past two years in Croatia were marked by the pandemic and two devastating earthquakes in 2020 – in the capital Zagreb (March) and cities in the Banija region (December). The shortcomings of the earthquake reconstruction plan, together with the inefficient government vaccination campaign, dominated media coverage throughout the year.

Croatian news publishers were particularly affected by COVID-19 since they have few paying subscribers and are largely dependent on individual copy sales and advertising. Total advertising spend at €200m in 2021 remains just two-thirds of the 2008 figure. COVID delivered an additional blow to print media advertising, which declined by 29% between 2019 and 2022 with consequent cutbacks in journalist numbers and salaries. The picture for internet advertising is rather better – even after leaving aside foreign-owned social media and search engines – revenues increased by 14% and TV advertising was up by 7% in 2021.⁴¹

All telecom companies and major commercial TV stations have been foreign-owned for almost two decades and this year has seen major changes in ownership and structure. Telecom and cable operators are now allowed to supply their own content, effectively making them gatekeepers to media content. This has benefited the cable news channel N1, which is now provided on both the largest telecom bundle (T-Com Max TV service), and a new entrant, Telemach's Eon TV service. Interestingly, Telemach's owners, the United Group, own both N1 and the free-to-air commercial station Nova. It is too soon to say what the editorial impact of these changes will be. This year also saw the return of Czech-based Central European Media Enterprises (CME)

to the TV market with the acquisition of RTL TV from its German owners. RTL's sale marks another step in the widespread retreat of Western media owners from Central and Eastern European media.

The death of the mayor of Zagreb in February 2021 marked the end of his 20-year control of the capital in cooperation with the ruling conservative HDZ party and sent ripples across the country. Following the election of a mayor from the new opposition left-green coalition *Možemo* (We Can) there was a wave of anti-corruption investigations. These resulted in the arrests of senior politicians and several friends of the former mayor. Among those was Kazimir Bačić, Director General of the Croatian public service broadcaster HRT, who was accused of corruption and bribery and dismissed. The new Director General was appointed by the Parliament in a process vigorously disputed by the opposition, but so far the change in leadership has not led to any noticeable changes in HRT's coverage.

There was a mixed picture for freedom of expression in 2021. In September the Zagreb municipal court imposed an injunction on the investigative left-leaning news portal H-Alter. The injunction prevented it from any further reporting about a Zagreb childcare clinic and its director Gordana Buljan Flander, where H-Alter had published stories criticising the clinic's policies in custody disputes. The injunction became a cause célèbre for press freedom and the director had to resign, with the new acting director withdrawing the injunction on their first day in office.⁴² In 2021 HRT had become infamous for suing its own journalists, and there was good news this year when HRT employee and Croatian Journalists Association President, Hrvoje Zovko, was acquitted of libel for stating that



Population	4.1m
Internet penetration	92%

HRT censored its journalists. In addition, two citizens prosecuted for Facebook posts against the Prime Minister that allegedly threatened public order were acquitted on grounds of freedom of expression. The outcome of these cases was positive for media independence.

This improvement may be reflected in the slightly increased proportion of our survey respondents seeing Croatian media as independent of political and economic interests (+3 and +4 percentage points, pp, respectively, since 2017), although the baseline percentages at 18% and 20% remain low. In addition, Croatia comes second only to Greece among our 46 countries for news cynicism, i.e. the percentages who think most news organisations put commercial or political interests ahead of what is best for society.

Zrinjka Peruško

Centre for Media and Communication Research, University of Zagreb

⁴¹ HURA Media AdEx medijska potrošnja. <https://hura.hr/istrazivanja/medijska-potrosnja-u-hr>

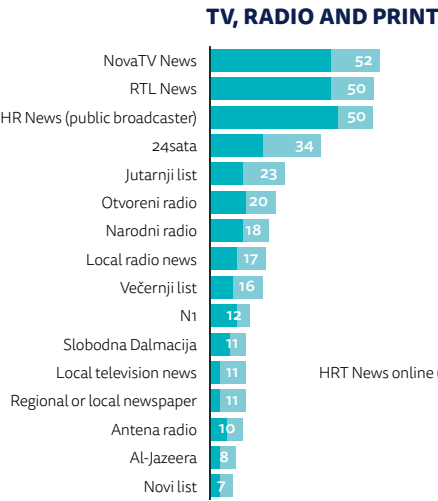
⁴² <https://cpj.org/2021/10/croatian-court-injunction-blocks-news-website-h-alter-from-reporting-on-public-childcare-clinic/>

WEEKLY REACH OFFLINE AND ONLINE

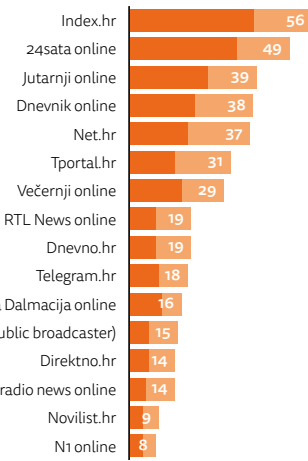
TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



ONLINE

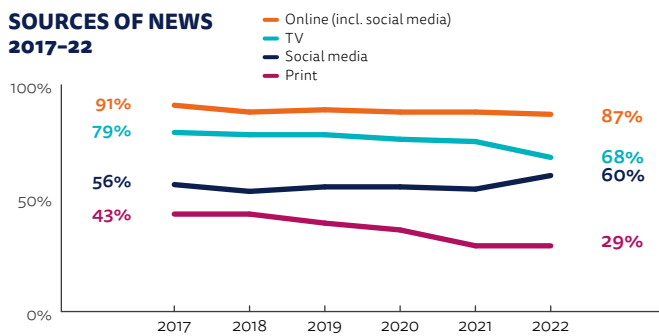


CHANGING MEDIA

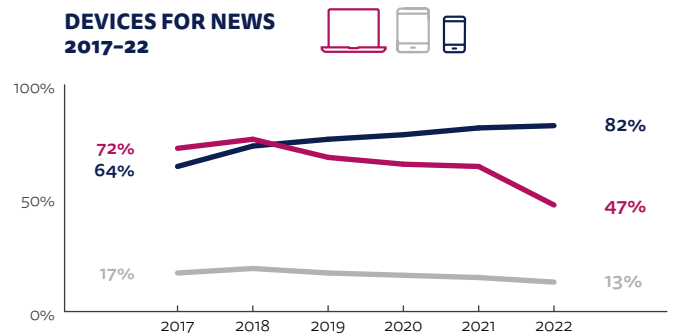
Online remains the top source of news, with social media's growth matching a similar decline in TV, and print stable at 29%. After a 17 percentage point decline in computer use for news access, the dominance of the smartphone is now total.



SOURCES OF NEWS 2017-22



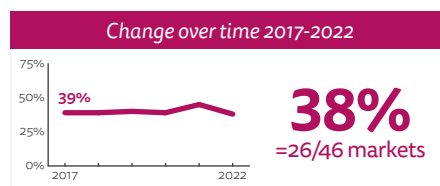
DEVICES FOR NEWS 2017-22



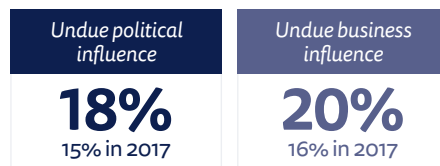
TRUST

Overall trust in news is down by 7pp, placing Croatia in the lower half of our surveyed countries, but the declines in brand-level trust are much more severe, ranging from 9 to 18pp, with the largest loss recorded by daily newspapers and commercial TV, closely followed by the public broadcaster HTV.

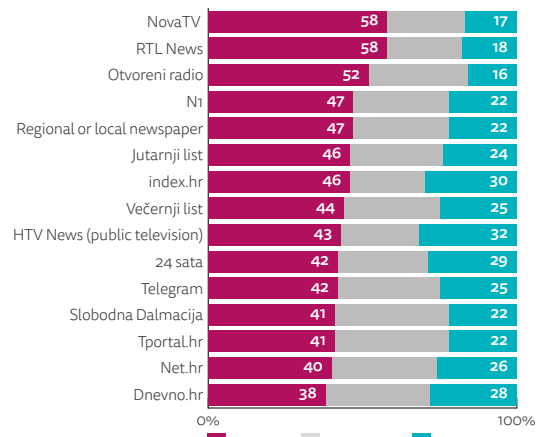
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

35%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	57% (+2)	74%	4	Viber	15% (-1)	52%
2	YouTube	30% (+4)	71%	5	Instagram	14% (+3)	41%
3	WhatsApp	20% (+1)	63%	6	Facebook Messenger	12% (+1)	46%

CZECH REPUBLIC

Another year of the pandemic further deepened the longstanding economic troubles of the Czech print media. However, most other media sectors experienced a rebound in the second half of 2021. The crisis has intensified the search for new business models and digital innovations in media and journalism.

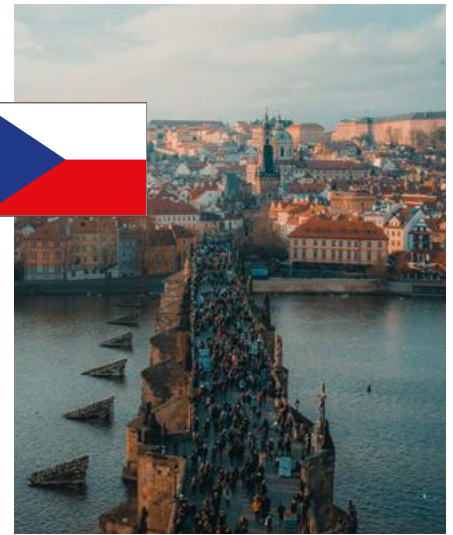
Newspaper sales continued their decline in 2021, and even though the pace of the decline (-10% in sales) was slower than in the record-breaking 2020 (-16%), there was no return to pre-pandemic levels. The tabloids and regional papers were among the ones suffering the biggest falls, as much as 16% in the case of the regional daily chain *Deník*.⁴³ While advertising expenditures in print media bounced back from what has been the worst year since 2008, it has been insufficient to halt the industry's continuing crisis, resulting in further budget cuts and layoffs, including of journalists. As in the previous year, and in stark contrast to many other EU countries, there was no state support for the sector to alleviate the impact of the pandemic.

Online news media, on the other hand, have continued to benefit from the increased traffic observed since the start of the pandemic, even exceeding that seen in 2020.⁴⁴ Some digital-born brands have reported further increases in subscribers, such as the daily *Deník N*, which in early 2022 reached 25,000 subscribers, their target for becoming profitable. Legacy publishers and media houses have explored various ways of increasing online revenues, especially by introducing or expanding premium content, including podcasts, which have become very popular ways of accessing news and other types of online content over the last few years. The recent boom in podcasting has led the largest Czech digital company, Seznam.cz, to launch its own platform *Podcast.cz*, giving space – and contracts – to dozens of podcast producers (both news media brands and freelance authors), whose content it monetises, capitalising on its market dominance. The growing popularity of aggregating and monetising online content produced by individual authors and

journalists is further documented by several other digital platforms that have emerged last year, including *Gazetisto.com*, funded by one of the leading media houses Czech Media Invest and offering newsletters or podcasts for subscribers, or start-ups like *HeroHero* or *Pickey*, community-type platforms for creators of a wide variety of paid content.

In 2021, the Czech Republic became the first Central and Eastern European country where Google introduced Google News Showcase. Initially, five Czech publishers – Echo Media, *Economia*, *Forum 24*, *Internet Info*, and *N media* (the publisher of *Deník N*) – signed up for this service, receiving payment for selected premium online content of theirs to be made available by Google to its users; in July 2021, they were joined by the Czech News Agency (ČTK), with further contracts being reportedly under negotiation, but the terms of all these deals are confidential.⁴⁵

In the audiovisual sector, competition between streaming services has intensified, involving both global and local players. Netflix has gained more rivals in *Discovery+* (offered via the mobile operator Vodafone) and in *HBO Max*, while *Disney+* started streaming in June 2022. In addition, the leading Czech commercial broadcaster TV Nova has restarted its online platform *Voyo*, existing as a video archive since 2012, which has been rebranded as a fully-fledged subscription streaming service in 2021 and quickly reached 350,000 subscribers, placing it second only to Netflix.⁴⁶ The public service broadcaster *Česká televize* has also stepped up its involvement in online video, launching a new generation of its on-demand platform *iVysílání* in December 2021 and announcing new online-only programme formats – in an



Population	10.6m
Internet penetration	88%

attempt to attract the increasingly elusive young demographic.

The long-running conflict between the management of *Česká televize* and its regulatory body, the Czech Television Council (dominated by political appointees representing the interests of the governing parties) gained international attention, including an unprecedented appeal to the Prime Minister Andrej Babiš by the European Broadcasting Union in April 2021 to cease political pressures on Czech Television. The tension reduced following the 2021 parliamentary election which delivered a decisive victory to the opposition parties that have subsequently formed a new government, headed by Prime Minister Petr Fiala. While the political independence of Czech Television has been largely safeguarded throughout these battles, they further underlined the weakness of the current governance model, which leaves the public broadcaster vulnerable to capture by the government of the day.

Václav Štětka

Loughborough University, UK

⁴³ <https://www.mediaguru.cz/clanky/2022/02/prodej-tuzemskych-deniku-se-loni-snzil-o-desetin/>

⁴⁴ <https://www.mediaguru.cz/clanky/2021/10/navstevnost-zpravodajskych-webu-je-zatim-vyssi-nez-loni/>

⁴⁵ <https://zpravy.aktualne.cz/ekonomika/google-spustil-v-cesku-program-pro-placeni-za-obsah-mediim/r--db6f469aa1b311ebb2f60cc47ab5f122/>

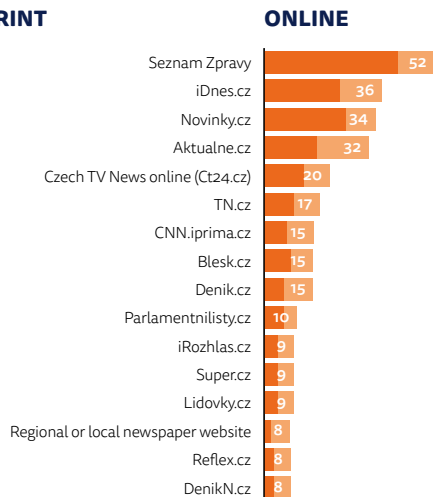
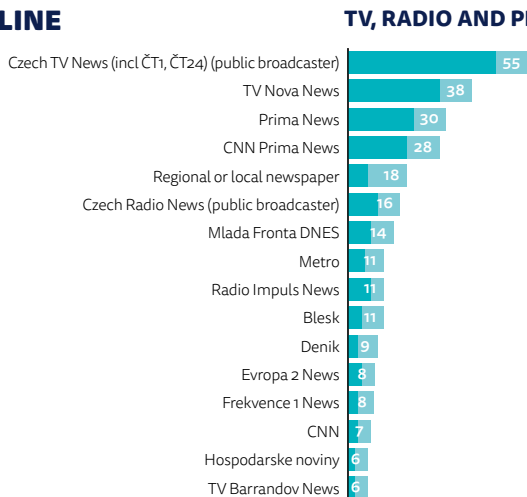
⁴⁶ <https://cc.cz/voyo-uz-predbehlo-hbo-a-dotahuje-netflix-investujeme-a-rosteme-rychleji-nez-jme-cekali-rika-digitalni-mozek-novy/>

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

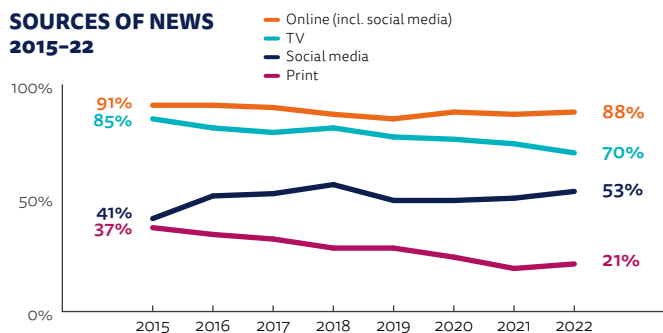


CHANGING MEDIA

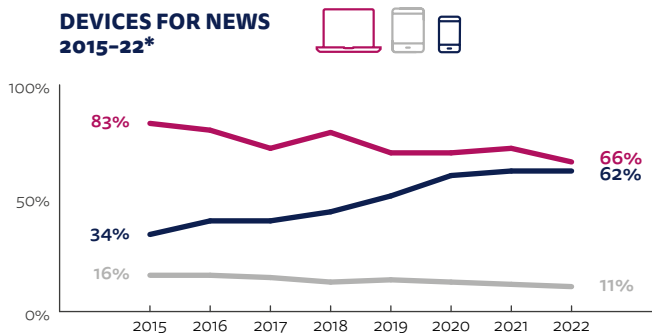
Online's importance as a news source has increased over the last year, while TV's decline continues. The smartphone will soon become the key device for accessing news and overtake the computer, which was nearly 50 percentage points (pp) ahead in 2015.



SOURCES OF NEWS 2015-22



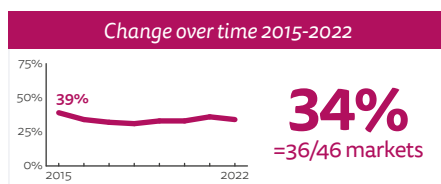
DEVICES FOR NEWS 2015-22*



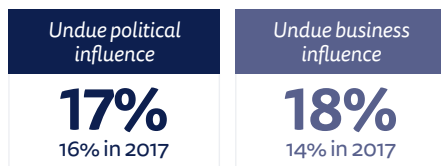
TRUST

Overall trust in news has dipped again, possibly reflecting information uncertainty and confusion during the second year of the pandemic. While both public service broadcasters have retained their lead in the brand trust ranking, COVID-related polarisation might be an explanation for the 4pp drop in the trust in Czech Television.

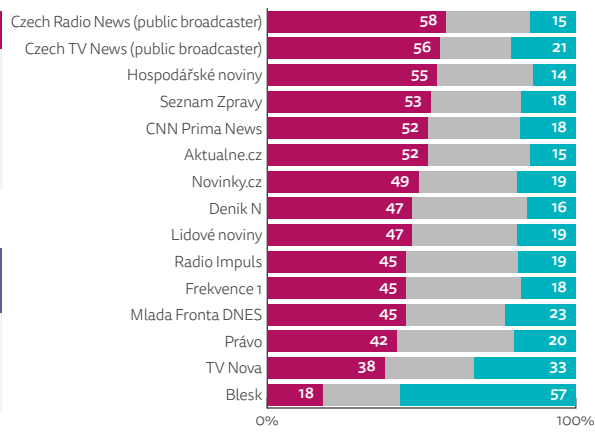
OVERALL TRUST SCORE



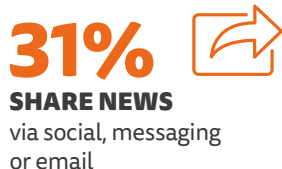
MEDIA IS FREE FROM ...



BRAND TRUST SCORES



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TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	45% (+3)	71%	4	Facebook Messenger	13% (-2)	49%
2	YouTube	23% (+2)	64%	5	Instagram	9% (-1)	31%
3	WhatsApp	14% (-)	50%	6	Twitter	7% (+2)	13%

DENMARK

The Danish media market has two strong public broadcasters (DR and TV2) and several successful commercial brands which all receive an annual public subsidy. With digital disruption gathering pace, in the spring of 2022 the government is rethinking media policy over the role of public broadcaster DR, and the scale of direct subsidies paid to local and regional media. It is also exploring a levy on tech platforms to contribute to Danish media production.

Like several other Nordic media markets Denmark looks relatively healthy, scoring high on trust (4th equal out of 46 countries), with low media polarisation and second only to Finland for the smallest percentage of people who think news organisations place commercial interests ahead of what's best for society.

Yet when the #MeToo movement hit Denmark, the media industry attracted widespread criticism. While editors claimed ignorance of past misdeeds, journalists spoke out, testifying to deep structural sexism and bullying of female colleagues, particularly in public broadcasters TV2 and DR, where former anchors and editors were forced to stand down. The outcry also hit newspapers such as the tabloid *BT*, whose editor-in-chief resigned.

#MeToo seems to have had more impact on the language and employment practices of media companies than on media policy itself. The current media policy package was postponed from 2021 and is still dominated by the long-running debate over the role and funding of public broadcaster DR, with the current Social Democratic government being more supportive than its centre-right predecessor.

As elsewhere, public broadcasters are losing out to Netflix and other streamers and are trying to work out how to invest more in on-demand without alienating traditional viewers. DR and TV2 are implementing ambitious strategic initiatives to make public service content sustainable for the age of streaming, with plans for more investment in their own streaming platforms, and digital news and sports 'live streams' separate from their broadcasting channels.

DR is also working to attract young audiences and has integrated all content (radio, TV, and online) for young people within a single department. DR's online children's channel Ultra launched a news app for 9- to 14-year-olds (Ultranyt+) and an associated social media channel. But the difficulty of retaining young audiences was also illustrated by the niche news brand *Altinget* dropping its news service (*Spektrum*), aimed at 13- to 18-year-olds, as soon as a three-year innovation fund grant expired.

The podcast market continues to grow, with 32% monthly use, up four percentage points (pp) on 2021. *Berlingske* followed others by launching a daily news podcast in May 2021 and *Ekstra Bladet* now provides three themed current affairs podcasts weekly.

Almost all commercial news media websites have paywalls, and after experimenting with different models, most now use the 'freemium model' with only limited content freely available. Digital subscription prices vary nationally, from *Jyllands-Posten*'s €13 to *Politiken*'s €40 per month. All major news organisations rely on a combination of subscriptions and advertising; notable exceptions are the tabloid *BT* (without a paywall) and the digital pure-player *Zetland* (which relies solely on a membership fee). Our figures show the numbers paying for news online increasing slightly to 18%, with the leading titles being *Berlingske*, *Politiken*, and *Zetland* which all reported growth in online payment in 2021.

The sizeable annual state subsidies for commercial news media (74 recipients in 2022) are awarded in proportion to the number of editorial staff, the size and social diversity of their readership, and the amount of democratically important political and cultural content they carry.



Population	5.8m
Internet penetration	98%

Niche nationals (e.g. *Kristeligt Dagblad* or *Information*) receive a €3.9m subsidy; national daily broadsheets (e.g. *Politiken*, *Berlingske*) and tabloids (e.g. *BT*, *Ekstra Bladet*) €2.3m; regional dailies €0.7–1.7m, local €0.3–0.8m; digital-born brands €0.1–0.9m. For most titles, particularly the niche nationals, these subsidies are essential to their very survival.

Possibly in anticipation of the government redirecting some of the state subsidy towards local markets, three news organisations launched new online local news services in 2021, hiring a total of 75 journalists. Regional conglomerate *Jysk Fynske* launched online news services in ten 'news deserts' in Jutland; *Jyllands-Posten* launched news services in four provincial cities; and tabloid *BT* opened local news services in four provincial cities.

As far as relations with tech giants are concerned, new national copyright legislation permits Danish news media to make collective deals with tech giants about paying for news content. Following that official 'encouragement', an alliance of 37 Danish media organisations has started negotiations with major tech companies about payment for online reuse of news content, in the hope of replicating what are seen as successful deals done elsewhere.

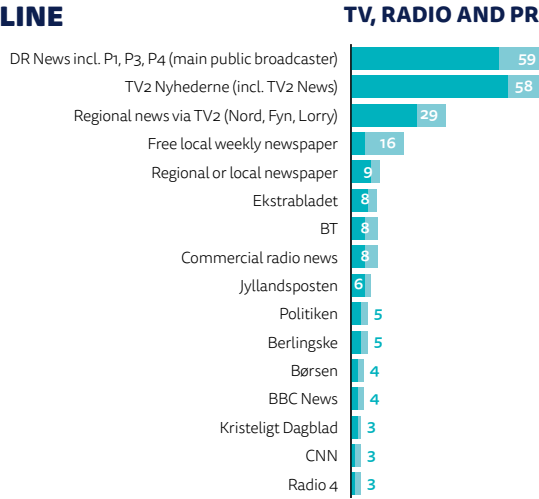
Kim Christian Schrøder,
Mark Blach-Ørsten, and
Mads Kæmsgaard Eberholst
Roskilde University

WEEKLY REACH OFFLINE AND ONLINE

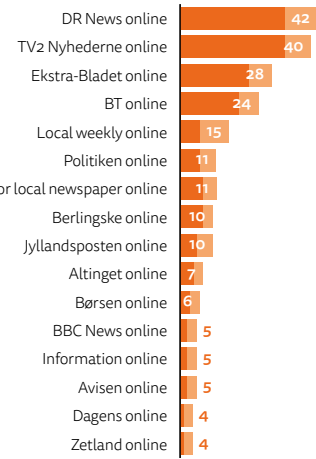
TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



ONLINE

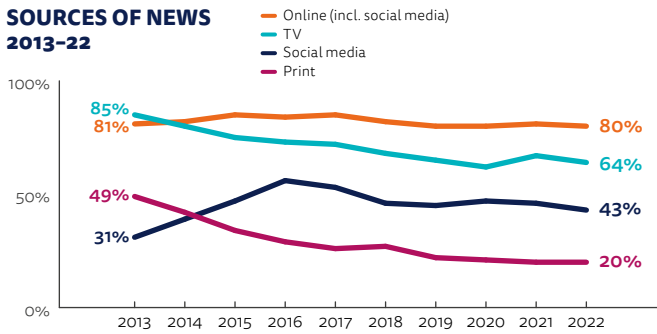


CHANGING MEDIA

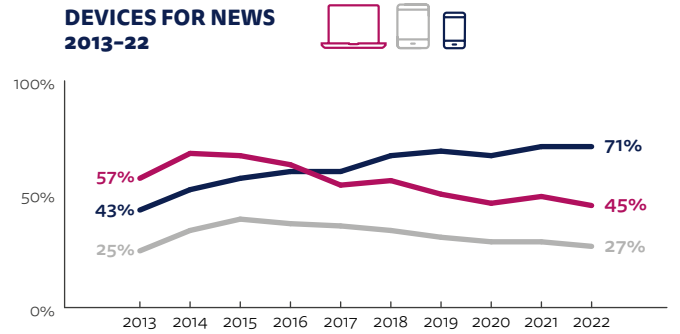
TV news has declined by more than 20pp over the last decade but has stabilised in the last few years with the help of a COVID bump. Print readership, at 20%, is at less than half the level it was in 2013.



SOURCES OF NEWS 2013-22



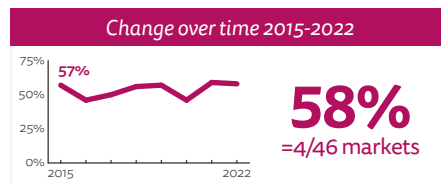
DEVICES FOR NEWS 2013-22



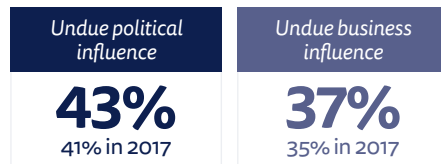
TRUST

Last year overall trust increased, probably as a reaction to greater news consumption during the pandemic. That trust dividend has been largely maintained but trust in individual brands is down slightly (between 3 and 6pp). Public service news brands still score highest for trust with national and regional/local news media close behind.

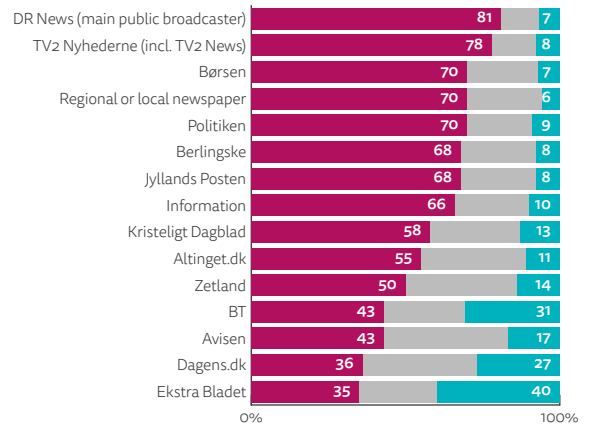
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All	
1	Facebook	35%	(-1)	72%	4	Instagram	7%	(+1) 40%
2	Facebook Messenger	8%	(-)	55%	5	LinkedIn	4%	(-) 19%
3	YouTube	7%	(-)	51%	6	Twitter	4%	(-1) 11%

FINLAND

Finland's news media environment features a strong regional press, a strong public service broadcaster (Yle), one widely read national daily (*Helsingin Sanomat*), and two popular evening tabloids, both reaching over half of the adult population. There is a relatively high level (19%) of paying for online news and Finnish news remains the most highly trusted among the countries surveyed, with levels continuing to rise this year even after the initial COVID-19 bump.

Finnish news media are recovering from the hit caused by Coronavirus, with the biggest companies increasing turnover and profit. Newspaper advertising (print and online, free city papers included) increased 8.6% from 2020 to 2021, after a decline of 21.2% from 2019 to 2020. The mood is more optimistic, with several companies now recruiting journalists and finding strategies to navigate the digital media environment.

The war in Ukraine, however, is increasing uncertainty. Many publishers (e.g. Sanoma, Keski-suomalainen, Kaleva Media) have announced they will stop using Russian paper, which is likely to increase paper costs.⁴⁷ This, along with rising delivery costs, adds further pressure to the profitability of printed press.

On the digital side, Yle, Alma Media, and some other companies are developing a national login solution that would work seamlessly across multiple online services as an alternative to a Facebook login. Finland has the highest proportion of users in our survey (49%) saying they would trust news sites to do the right thing with their data – compared with just 30% for social media. That looks encouraging for the publishers' login initiative at a time when the need to identify users through registration is increasing and regulation is making the use of cookies more difficult. Publishers also seek greater independence from the platform giants.

Finnish media companies have increasingly focused on getting paid subscriptions and putting more online content behind paywalls. The public service broadcaster Yle and the evening tabloids have been the main exceptions to this. However, in March 2021 one of the two Finnish evening tabloids, *Iltalehti*, introduced a paid 'Plus' section, where for €6.99 a month readers

can access at least three Plus stories daily, while the rest of the site can still be read for free. Of our Finnish respondents with an ongoing digital subscription, 12% say they have subscribed to *Iltalehti Plus*. More striking is that 50% say they have subscribed to *Helsingin Sanomat* and that 39% of those who pay say they are paying for regional or local news online, higher than in many other markets.

AlfaTV strengthened its position as a third television channel providing news and current affairs. Although its news only has a 6% weekly reach, its volume of current affairs programmes is comparable to that of Yle. In 2021, AlfaTV secured additional investment to help broaden its reporting and strengthen its finances. It has a somewhat conservative slant and seeks to broaden the range of perspectives on Finnish TV. However, its brand trust is only 45% compared to 84% for Yle and 78% for MTV. This may reflect Finns' limited ideological polarisation and the widespread trust placed in 'mainstream' news used by most people.

Government plans for a long-term direct subsidy mechanism for news media were not implemented in the 2022 budget. An earlier ministry working group report had proposed a system of direct subsidies for the costs of journalistic work and development of new activities and content, along with support for community media. The current system depends almost solely on a reduced 10% VAT rate for newspapers, books, and magazines, both online and print. If the new scheme was realised it would make Finland's system a bit closer to the more generous systems of other Nordic countries.

A law restricting Yle's right to publish online news in text will come into force in August 2022. Its origins lie in the Finnish Media



Population	5.6m
Internet penetration	94%

Federation's 2017 complaint to the EU claiming that Yle's online news in text form contravened EU state aid legislation. The law restricts such content online to that related to their audiovisual content or covered by specific exceptions. For example, short text-based updates on fast-moving news events *would* be allowed even if unrelated to Yle's video or audio content. It is too early to assess the actual impact on Yle online.

The concentration of Finland's regional press continued when Keski-suomalainen bought Hämeen Sanomat, owner of two daily papers, and increased its stake in another newspaper publisher, Ilkka-Yhtymä. In 2020, Keski-suomalainen and Sanoma already accounted for over half of Finnish newspapers' subscription and advertising revenues.⁴⁸

Esa Reunanen
Tampere University, Finland

⁴⁷ Suomen Lehdistö, 1 and 9 March 2022.

⁴⁸ Suomen Lehdistö, April 2021.

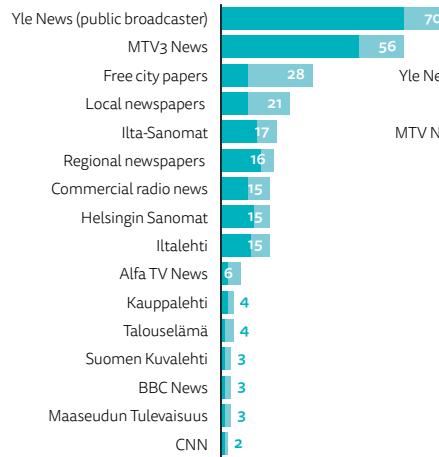
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

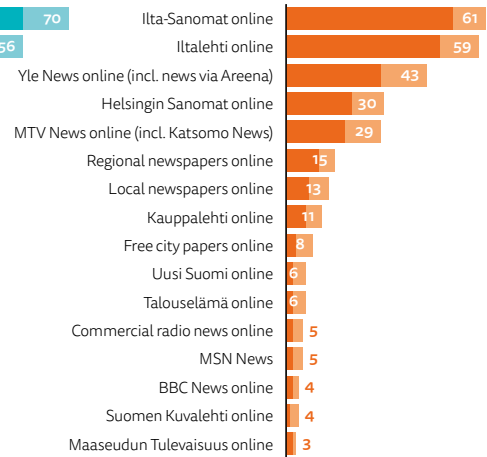
% Weekly usage

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- More than 3 days per week TV, radio & print
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TV, RADIO AND PRINT



ONLINE

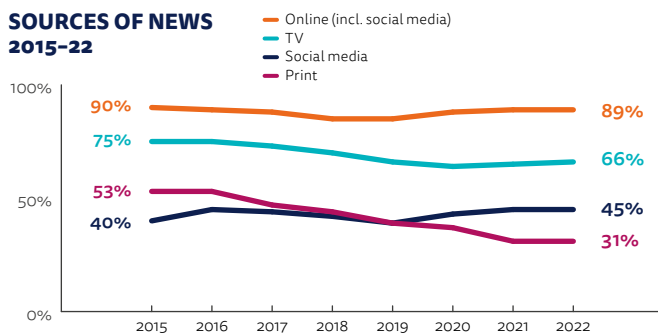


CHANGING MEDIA

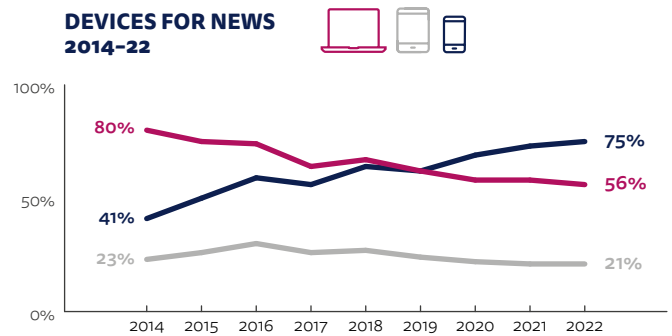
The use of online news sources stayed flat after a gain made by non-paywall sites in two previous years (e.g. Yle, MTV, Ilta-Sanomat). On devices for news, the steady move from computers to smartphones continues.



SOURCES OF NEWS 2015-22



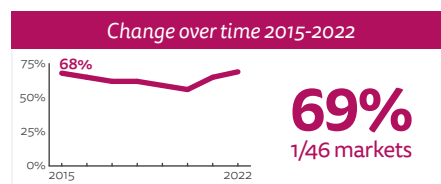
DEVICES FOR NEWS 2014-22



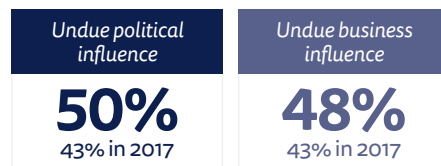
TRUST

Finland's increasing trust over recent years – and the fact this continues after the COVID-19 bump – contrasts with most other countries in the survey. It could be that in Finland increasingly polarised debates (over COVID-19 restrictions, and EU policy) may have increased the majority's trust in experts, institutions, and indeed the news media.

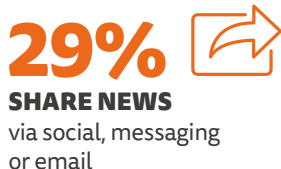
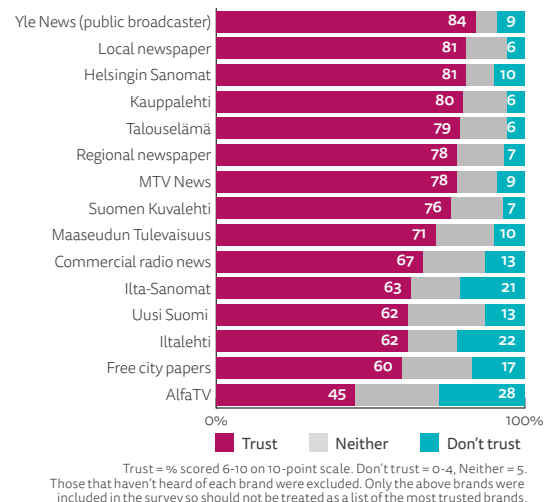
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	31% (-1)	71%	4	Instagram	8% (-)	47%
2	WhatsApp	14% (+1)	72%	5	Twitter	6% (-2)	16%
3	YouTube	12% (-1)	69%	6	Facebook Messenger	5% (+1)	37%

FRANCE

The past year has seen the French news agenda sandwiched between repeated COVID lockdowns and an April election that re-elected President Macron but after a low-key campaign with limited interest and reduced turnout. Our data from late January and early February 2022 show static news consumption, and trust down for most news brands. But increased interest in Ukraine and some successful pay strategies provide grounds for optimism.

The Ukraine crisis has sparked a renewed interest in news. President Macron's first televised address on Ukraine on 2 March drew over 21m people – 84% of the TV audience.⁴⁹ News websites saw similarly impressive traffic around Ukraine with 8m visits to 20minutes.fr (which leads our list of online sources) on 24 February, the first day of war, compared to a daily average of 3.5m.

News consumption in France appears to be driven by either a foreign or a domestic crisis, but understandably new and decisive events resonate best. A March 2022 presidential TV election show with the leading eight (of 12) candidates drew 4.2m, just 20% of the TV audience, reflecting early assumptions of an easy win for Macron. Even as the contest tightened before the decisive second round, the Macron–Le Pen debate drew just 15.6m viewers – smaller numbers than their 2017 election clash.

Our survey data collected before the Ukraine war showed that news avoidance was up, with 36% saying they often or sometimes avoid the news compared to 33% in 2019 and 29% in 2017. When it comes to interest in different types of news only 24% of 18–24s say they are interested in COVID news, compared to 51% of the oldest 55+ age group.

More generally local, international, and political news are among the most popular types of news, but levels of interest tend to increase with age, with 34% of 18–24s versus 68% of over 55s for local news, 37% to 61% for international news, and 36% to 56% for political news. By contrast, interest in environment and climate change news varies less with age (an eight percentage point gap between 18–24s versus over 55s).

Local and regional news brands do particularly well in France and score best for

trust. Aggregating figures for all the regional and local titles we asked about shows (after removing overlaps) that they are read by 31% offline and 17% online weekly.

TV remains the most popular way of accessing news first thing in the morning (27%), followed by the smartphone (25%) and then radio (23%). Radio's continued importance as a news source is an unusual feature of the French market. Facebook remains the leading social media source for news (39%), with 9% using Twitter for news and 5% TikTok. Explainers about the war in Ukraine on TikTok are performing particularly well.

The proposed merger of the M6 and TF1 TV groups is under investigation by the Competition Authority. Their main channels, TF1 and M6 News, are used weekly by 35% and 26% of our respondents, indicating the considerable audience the merged company would attract, and together the firms account for 75% of TV revenue.

Google has recently signed an agreement to pay about 300 French publishers for the right to display their news content online on its search engine's results page. This reflects the latest twist in a three-year dispute over so-called 'neighbouring rights' and a reopening of a 2021 deal after the Competition Authority found against Google. The current agreement includes more publishers than before but only includes daily local and national news brands, with the hope that magazines will be included later.⁵⁰

Only 11% of our French sample pay for online news, unchanged since last year, but some have seen significant growth in digital subscriptions. Lemonde.fr is the first news website to exceed 400,000 digital



Population	65m
Internet penetration	92%

subscribers while the digital pure-player Médiapart continues to perform well with its model of reader-funded investigative journalism and now has nearly 215,000 digital subscribers.⁵¹ *Le Figaro* reports 400,000 subscribers, including 250,000 digital-only, a 20% increase since 2020.

In early 2022 President Macron defended the importance of a professional, independent media faced with rising misinformation. In March he promised to abolish the TV licence fee (€135 per annum) if re-elected, in favour of a direct government grant. However, defenders of the various public service media it funds (e.g. France Télévisions, Radio France, and Arte) fear that this change, if implemented, could in time reduce their funding and independence.

Alice Antheaume

Executive Dean, Sciences Po Journalism School

⁴⁹ <https://www.lefigaro.fr/medias/plus-de-21-millions-de-francais-ont-suivi-l-allocation-d-emmanuel-macron-20220303>

⁵⁰ <https://www.euronews.com/2022/03/03/neighbouring-rights-google-agrees-new-deal-to-pay-french-publishers-for-news-content>

⁵¹ <https://gijn.org/2022/03/16/france-mediapart-successful-model-investigative-journalism/>

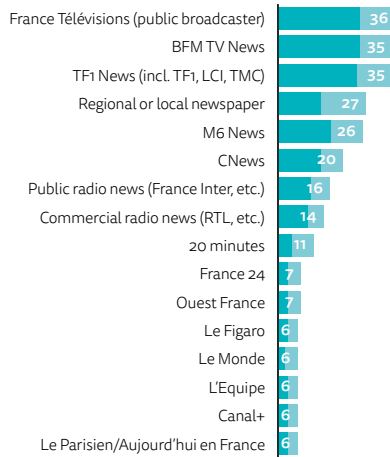
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

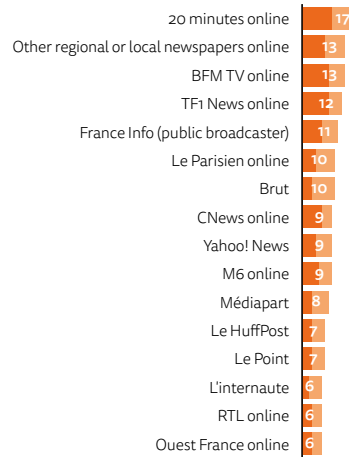
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE



CHANGING MEDIA

Online news sources (69%) have edged ahead of television (64%) as a weekly source of news but TV remains unusually important in France. Print's long decline continues, and its 15% weekly use is less than half that in 2014.

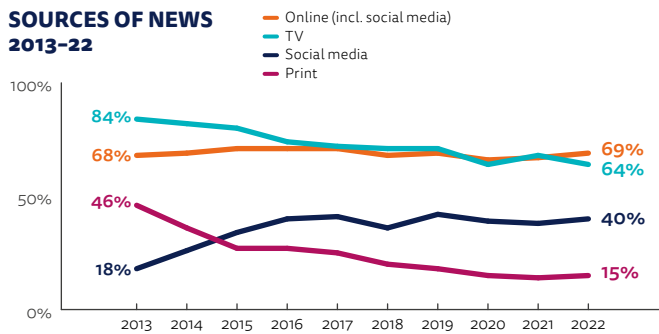
11% pay for **ONLINE NEWS**



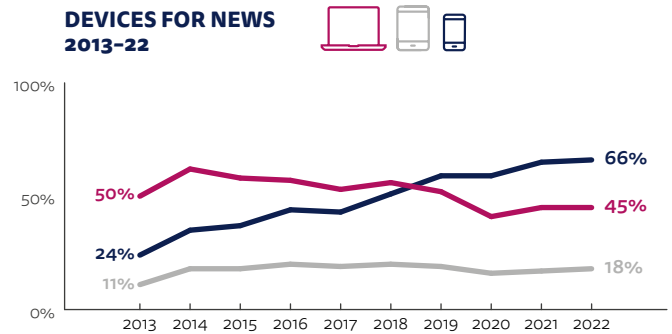
29% listen to **PODCASTS** in the last month



SOURCES OF NEWS 2013-22



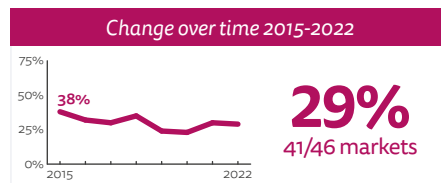
DEVICES FOR NEWS 2013-22



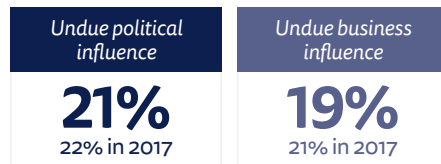
TRUST

France ranks low in terms of overall trust by international standards, and just 21% and 19% think the media are independent of political or business influence, respectively. Most brands have lost trust since 2021, with BFM TV having more distrust than trust. Regional and local papers remain the most-trusted brands, then public service (France Télévisions and France Info), followed by *Le Monde*.

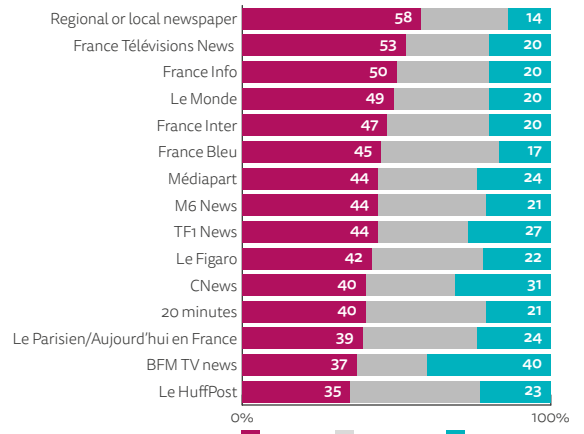
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

30%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	39% (-)	61%	4	WhatsApp	13% (-2)	39%
2	YouTube	25% (+1)	56%	5	Instagram	13% (+1)	31%
3	Facebook Messenger	14% (-)	37%	6	Twitter	9% (-1)	15%

GERMANY

Interest in news declined somewhat after the 2020 COVID boost. Nevertheless, usage remains high, with 92% consuming news several times a week and more people paying for online news. 2022 was also the year when #MeToo impacted on Germany's media leaders.

Many providers are expanding their news programmes. The commercial station RTL launched a TV news programme *RTL direkt*, on four evenings a week, recruiting high-profile presenters from public service channels. Another commercial news channel, n-tv, has also increased its news and now broadcasts news on its digital channels on the hour. Meanwhile the influential tabloid *Bild* moved into broadcast TV in August 2021, with BildTV providing tabloid-oriented news, political and sports talk shows and documentaries.

Public service news providers are developing new digital formats, broadening their news coverage and focusing more on climate change in an attempt to reach younger viewers. For example, MDR is producing a gaming-style news format *WozUp* for young users and WDR has launched NOWU (Now You), a web portal focused on climate change aimed at young Europeans. Sustainability and climate change are now covered everywhere, including by the centre-right FAZ which launched a climate blog *Kippunkt* (Tipping point).

In October 2021, moves to reform public service broadcasting began with a consultation on proposals to modernise their remit, including the scope of online activities, but progress will take time. Proposals for changed funding arrangements remain unclear but could include indexing the licence fee to inflation. However, there is no consensus on that idea between the federal states.

Meanwhile commercial publishers have been making some progress in persuading people to pay for online news, with a five percentage point (pp) increase this year in the proportion contributing via a subscription, donation or one off payment.

The titles mentioned most frequently by our paying respondents are *Bild* and *Der Spiegel*. *Bild* reported overall (print and online) subscriptions at 116,000 in Q4 2021 (4% up year-on-year), while *Der Spiegel* reported overall subscriptions up 12% at 428,000, of which 232,000 were digital. Meanwhile *Die Zeit* reported overall subscriptions up 13% at 466,000 by Q4 2021, with digital accounting for 180,000 of that figure, a 43% increase on the previous year.

Yet increased digital revenues are hardly making up for reduced income from print and some publishers are looking to cut costs accordingly. The *Stuttgarter Zeitung* has shed up to 55 jobs and VRM is selling several regional daily newspapers. Consolidation is another popular strategy with the Belgian Mediahuis Group buying Aachener Verlagsgesellschaft, along with two dailies and a weekly newspaper. Gruner+Jahr, the publisher of *Stern* and other premium magazines, was acquired by RTL.

In 2021, Germany implemented the EU directive on so-called 'neighbouring rights' which enables payments by platforms to publishers for use of their content online. Companies such as Spiegel, Die Zeit, and FAZ concluded confidential agreements with platforms. But other publishers, including Axel Springer, and major TV stations Sat1, RTL, and ProSieben, have taken a different approach. Represented by Corint Media, a collecting society for media copyright, they demanded €190m from Facebook and €420m from Google, but these amounts have been rejected, with Google reported as having offered €3.2m.⁵² Corint has also lodged a complaint with the Federal Cartel Office against Google Showcase and sued Microsoft for its use of members' content, complaining about the company's 'contradictory' behaviour after



Population	82m
Internet penetration	96%

it reportedly offered €700,000 for content rights the collecting society claim are worth €20m.⁵³

A 2021 scandal at the top of German media might be said to have created Germany's #MeToo moment. In spring, journalists from the German publisher Ippen uncovered allegations of abuse of power and sexual exploitation of female staff at *Bild* over several years by the Editor-in-Chief, Julian Reichelt. Ippen's management prevented publication but the story was taken up by the *New York Times* and *Der Spiegel*. Initial internal investigations led to Reichelt's departure but he was then reinstated after Matthias Döpfner, CEO of *Bild*'s owner Axel Springer, supported him. It was only in October 2021 after further allegations against Reichelt that he left permanently.⁵⁴ Döpfner described Reichelt in a private text message as 'really the last and only journalist in Germany who is still courageously rebelling against the new GDR authoritarian state. Most of the other journalists have become propaganda assistants.' This unapologetic line was particularly controversial because Döpfner is also president of the BDZV (German Newspaper Publishers and Digital Publishers Association) and has been spearheading Springer's global expansion with the purchase of *Politico* in the US. The German fallout includes the departure of the Funke Media Group from the BDZV. In the English-speaking world, the story – and the company's reaction to it – has not gone down well.

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Hans Bredow Institute, Hamburg*

⁵² https://www.corint-media.com/3_2-millionen-euro-fur-presse-rechte/

⁵³ <https://www.euractiv.com/section/copyright/news/corint-media-sues-microsoft-for-e20m-over-press-content-use/>

⁵⁴ <https://www.nytimes.com/2021/10/17/business/media/axel-springer-bild-julian-reichelt.html> and <https://www.ft.com/content/0317edd2-cf37-4d32-9e03-e7288904126c>

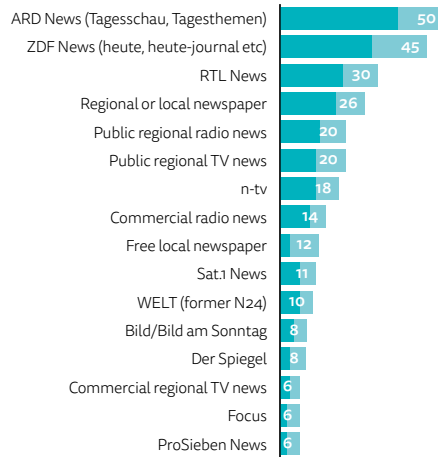
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

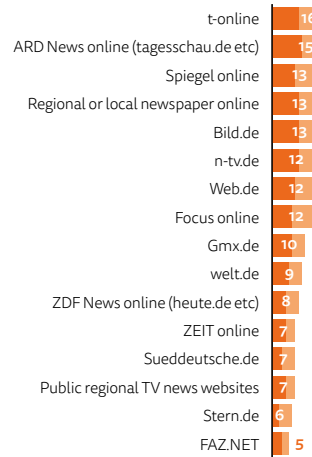
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TV, RADIO AND PRINT



ONLINE

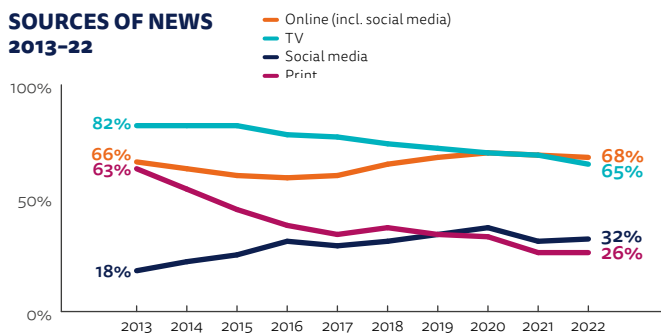


CHANGING MEDIA

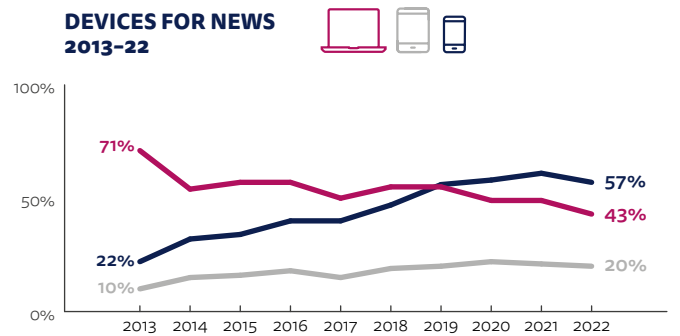
TV's continuing decline meant it was overtaken by the internet as a news source, with print remaining stable. News on social media seems to have levelled off, and more people are paying for online news.



SOURCES OF NEWS 2013-22



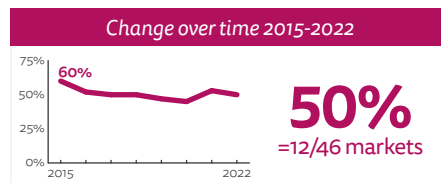
DEVICES FOR NEWS 2013-22



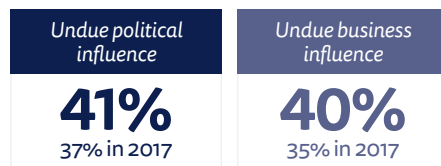
TRUST

Trust remains relatively high by international standards, even if there has been a small decline overall, with most brands also showing marginal decreases. However, belief in independence from undue political and commercial influences has increased compared with the last polling five years ago. The most trusted sources continue to be public service news media and regional newspapers. The tabloid *Bild* is least trusted.

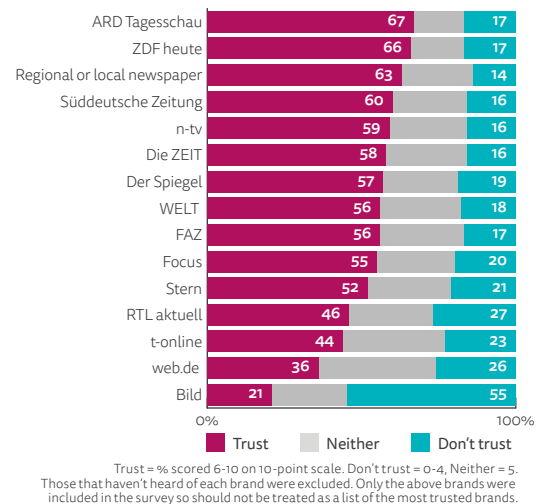
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	17% (-1)	41%	4	Instagram	8% (+1)	28%
2	WhatsApp	15% (-2)	68%	5	Twitter	4% (-2)	10%
3	YouTube	14% (-2)	52%	6	Telegram	4% (-)	11%

GREECE

The media market in Greece is characterised by digital fragmentation, lack of trust in news, high perceptions of undue influence, and high use of social media for news.

Perceptions of media bias have been central in the political debate during the past year in Greece. The controversy over the government's payments to particular news organisations for broadcasting COVID 'stay at home' messages in 2020 intensified, as a parliamentary inquiry examined the process. Journalists and watchdog organisations like Vouliwatch have been asking the government to release the confidential criteria behind the funding. This discussion follows a long tradition of vague criteria for state support for news organisations in Greece. At the same time, the case of an alleged attempt by a minister of the previous government to interfere with the TV licensing process is expected to reach a special court. In this environment, it is no surprise that Greece has the lowest share of citizens thinking that the press is free from undue political (7%) or business (8%) influence across 46 countries.

The online news media market in Greece is fragmented and heavily disrupted: the audience's attention is divided between many news sources and the legacy news market has been disrupted by pure-players such as Newsbomb and News247. Many digital-born brands are news websites created by journalists who became prominent while working for legacy news organisations. The majority of news brands in Greece still prioritise page views over building loyal audiences, partly explaining why there is not a culture of payment of online news in Greece. On top of these problems for news media organisations, the percentage of those very or extremely interested in news in Greece fell by seven percentage points (pp) during the past year, as it did across most countries, partly due to COVID-19 news fatigue.

Publishers are investing in podcasts. While last year there were mostly digital-born and digital-savvy news organisations experimenting with podcasts, this year saw legacy news organisations like *Kathimerini* entering the market with current affairs discussions. Charts of the most successful news-related podcasts suggest that listeners prefer opinionated discussions and documentary-style analysis of current affairs.

Social media news use is very high in Greece. Around seven in ten (71%) of online users get news this way each week, partly explaining the fragmentation of the online media market. Publishers allocate considerable time and resources in their social media distribution strategies, as platforms generate a large share of traffic to news websites. Despite the range of social media platforms now used for news, which include messaging applications, TikTok and Instagram, Facebook is still king with 53% of the online population using it for news.

During the COVID-19 vaccination programme, the discussion surrounding the role of social media in society intensified, particularly due to anti-vaccination personalities on Facebook spreading misinformation. After the Prime Minister called social media 'a threat for democracy' last year, the Parliament passed a law making it a criminal offence 'to spread false news, capable of causing concern or fear to the public or undermining public confidence in the national economy, the country's defence capacity or public health'. The law makes spreading misinformation punishable by a fine and imprisonment for three months or more. The first person to be arrested based on the new law was a prominent anti-vaxxer who spread



Population	11.1m
Internet penetration	73%

misinformation on Facebook regarding COVID-19 and vaccines. His trial is pending.

The TV news media market is still strong in Greece, particularly for older age groups. The relaunch of MEGA TV saw the channel regain a leading spot in the list of offline news sources, with 39% of the sample saying that they have used it for news at least weekly. MEGA TV was bought and relaunched by Evangelos Marinakis, who has acquired many legacy outlets during the past few years. Broadcasters are relatively weak in the digital market, particularly when compared to newspapers' or digital-born websites. In 2021, the public service broadcaster ERT launched its own news webpage called ertnews.gr. Open News also received a lot of attention partly because of its non-stop news coverage during major breaking events like the wildfires in August 2021, as well as the ties of its Russian-Greek oligarch owner Ivan Savvidis to the Kremlin.

The Russian invasion in Ukraine ended the official collaboration between the public Athens-Macedonian News Agency and the Russian state agency Rossiya Segodnya. The partnership, which was signed in 2015 under the previous Greek government, fed Greek news media with translated opinion articles from Rossiya Segodnya.

Antonis Kalogeropoulos
University of Liverpool

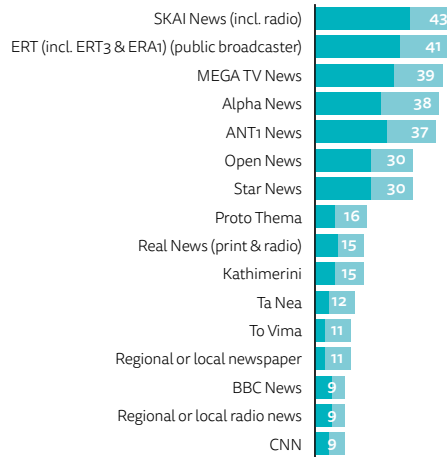
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

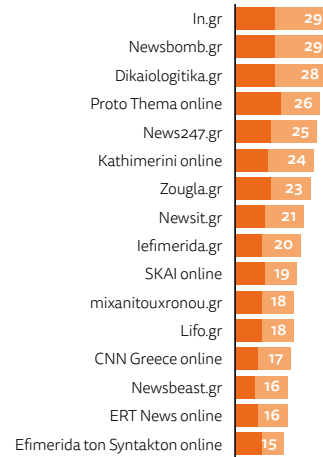
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

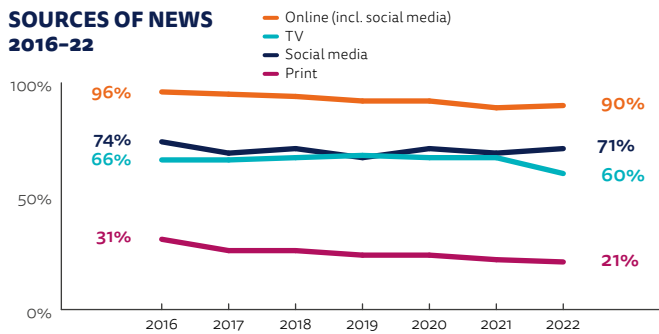


CHANGING MEDIA

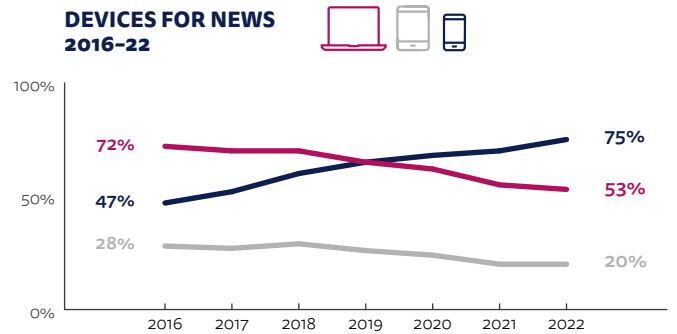
Smartphone use for news has overtaken that of computers in recent years. Use of TV as a news source fell by 7pp during the past year (pre-Ukraine war) partly due to COVID-19 news fatigue. Social media use is still strong.



SOURCES OF NEWS 2016-22



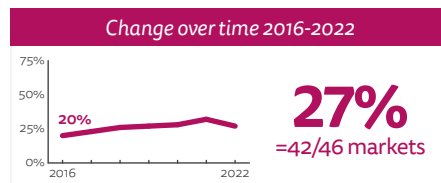
DEVICES FOR NEWS 2016-22



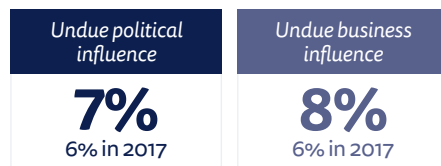
TRUST

Greece is well behind most countries for trust in news and there was a further decline (-5pp) this year. Trust in many news media brands also fell by over 10pp. The most trusted news brand is a generic local or regional outlet, reflecting the role of partisanship in the lack of trust in news.

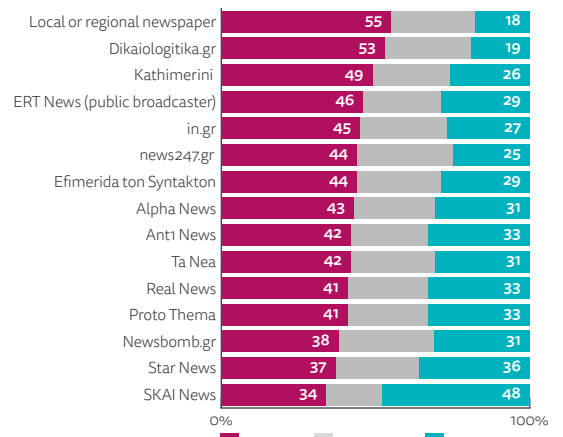
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	53% (+1)	76%	4	Facebook Messenger	23% (-)	61%
2	YouTube	36% (+3)	76%	5	Instagram	21% (+6)	52%
3	Viber	24% (+1)	62%	6	Twitter	15% (+3)	25%

HUNGARY

In April 2022, prime minister Viktor Orbán led his ruling party to a fourth election success in a row, with a two-thirds majority in Parliament. Many see his tight grip on the media as a key factor in his victory, where public service media are tightly controlled and many other major outlets are under either direct or indirect government influence. But some independent media remain, particularly online.



Population	9.7m
Internet penetration	89%

Over the last decade, Viktor Orbán and his ruling Fidesz party have 'unceasingly attacked media pluralism and independence', according to the World Press Freedom Index report from Reporters Without Borders (RSF).⁵⁵ Public broadcasting in particular has been turned into a government 'propaganda organ', with very limited time given to opposition parties, and according to leaked emails, the Hungarian National News Agency (MTI) receives instructions from the head of the Prime Minister's Press Office on what to cover and what not to cover, including precise terms, headlines, and leads to be used.⁵⁶

Most commercial media are also controlled by pro-government actors, whether through ownership, state advertising, or other forms of public funding. Some foreign-owned outlets such as the German-owned commercial TV station RTL Klub, have more freedom, but most foreign media owners have left Hungary.

The result is that politicians and officials rarely face critical questioning and don't respond to journalists' queries. Journalists' access to information is limited and critical journalists are subject to smear campaigns and harassment online. In 2021, it emerged that the Ministry of Justice had approved the use of the Pegasus cybersecurity spyware against investigative journalists and some media owners. In that year there was also a new law with implications for press freedom that bans any content portraying or 'promoting' homosexuality to anyone under 18 and that links homosexuality with paedophilia.⁵⁷ In February, Klubrádió, the last remaining critical radio station on air, was forced to cease broadcasting and move online-only as the Media Council, controlled by the ruling parties, refused to

renew its licence. It is unsurprising that only 15% of our survey respondents think media are independent from undue political or government influence.

The online space is freer than traditional media, but the enormous imbalance in resources is reflected in the dominance of posts from the ruling parties; Facebook, used by around six in ten (60%) for news, was flooded with pro-government messages prior to the elections. Pro-government media outlets are instrumentalised to promote messages on social media supporting the ruling Fidesz party.

Pro-government and independent outlets share the lead among online brands with index.hu and Origo in the top four, both former pioneers of independent online journalism now turned pro-government. Two independent outlets with over 20% reach are 444.hu and Telex. Both were started by former index journalists, in 2013 and 2020 respectively, in response to increased government influence on index. The owner of the most widely used independent outlet 24.hu, Zoltan Varga (Central Group), was targeted by Pegasus surveillance, an illustration of the severe pressures on independent journalism. A new development is that the commercial national television channel RTL Klub launched a news portal (rtlklub.hu) which already has 25% reach. As far as offline news sources go, RTL Klub is the most used by far with 48% of respondents turning to the station for news, with ATV and pro-government TV2 far behind at 25% and 29% respectively. The two national public service television channels on the list (Duna TV and MTV) are the least used television channels.

Some start-ups are trying to fill the need for public service journalism. One success story

is Partizán, an online TV channel created by Márton Gulyás, with a background in activism and theatre rather than journalism.⁵⁸ Partizán provides in-depth, trustworthy reporting on issues ignored by most other outlets, using innovative formats (including long-form in-depth interviews occasionally lasting over four hours), along with discussion of important social and political issues by ordinary citizens, and organising public debates during the election campaign. Partizán reached 8% of our respondents in the week of our survey, an enormous achievement for a new, online-only channel funded solely by individual donations from supporters along with some grants. Another encouraging development is the establishment of Lakmusz, the first fact-checking organisation in Hungary created by 444.hu's publisher, Magyar Jeti. The election campaign and the Ukraine war provided a plethora of stories to check.

While pro-government media benefit financially from government links, independent media are in fierce competition for audience and advertising. Many outlets are experimenting with donation and membership models, and a few started implementing freemium strategies with some of their content restricted to paying subscribers (hvg, mfor, 444.hu).

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Central European University

⁵⁵ <https://rsf.org/en/country/hungary>

⁵⁶ <https://www.direkt36.hu/en/kiszivargott-iratok-mutatjak-hogyan-diktalnak-orbanek-a-nemzeti-hirugynoksegnek/>

⁵⁷ <https://www.euronews.com/2021/06/15/mps-in-hungary-back-ban-on-sharing-content-with-children-that-promotes-homosexuality>

⁵⁸ <https://www.rferl.org/a/hungary-election-partizan-gulyas-orban/31780061.html>

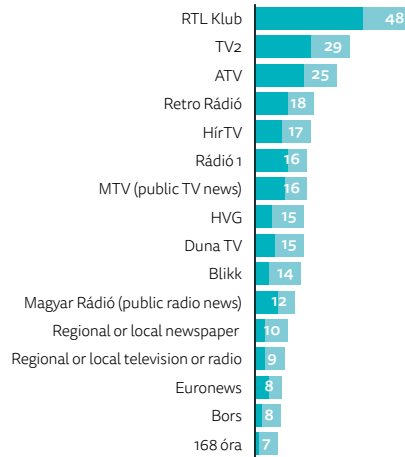
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

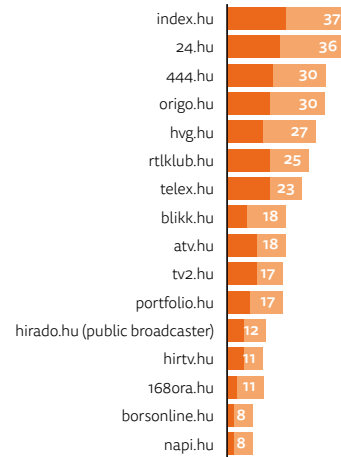
% Weekly usage

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TV, RADIO AND PRINT



ONLINE

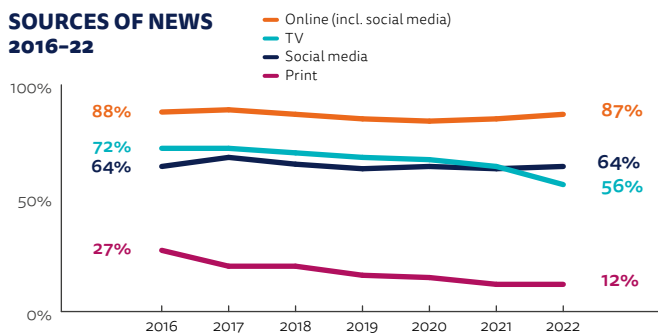


CHANGING MEDIA

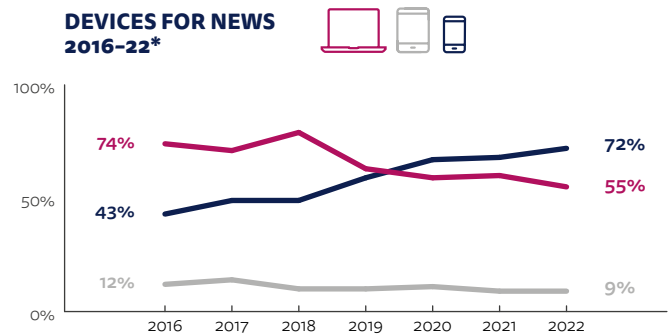
TV as a news source dropped by eight percentage points and was overtaken by social media, with online the top news source. Print remains at last year's very low level. Smartphones are now the unchallenged device for news as computers decline.



SOURCES OF NEWS 2016-22



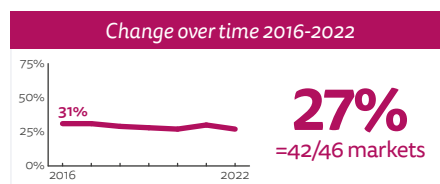
DEVICES FOR NEWS 2016-22*



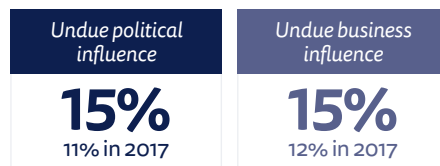
TRUST

Overall trust in news is extremely low at 27%. The two independent outlets, HVG and RTL Klub, are again the most trusted brands, with the independent online brands Telex and 24.hu slightly ahead of the more widely used index. State-funded broadcaster MTV is one of the least trusted brands, with less than a third of respondents trusting their news.

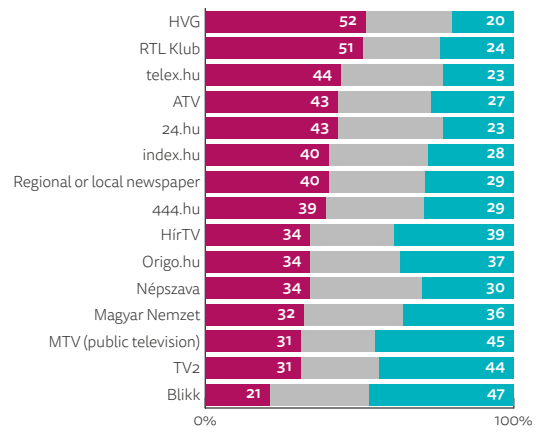
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

35%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	60% (+1)	81%	4	Instagram	8% (+2)	34%
2	YouTube	27% (+1)	75%	5	TikTok	5% (+3)	21%
3	Facebook Messenger	14% (+2)	66%	6	Viber	4% (+2)	27%

IRELAND

The Irish media are characterised by strong radio and television networks, including the main public service broadcaster RTÉ and a relatively small number of print publications still undergoing digital transition. Meanwhile, new initiatives are under way to support the sustainability of news media and address the harmful effects of social media.

The work of the Future of Media Commission has been central to much of the political and public policy-making discourse over the past 12 months, in particular the Commission's focus on the funding of the public broadcaster RTÉ and the sustainability of other print and online media. At the time of writing the Commission's report and recommendations are being reviewed by the Taoiseach and Catherine Martin, the Minister for the Arts and Media. RTÉ estimates it loses €65m a year in unpaid licence fees and the Director General, Dee Forbes, has spoken of a 'broken licence fee system'.

Separately, a new 'Media Commission' is due to come into being later this year and this will incorporate the functions of the current Broadcasting Authority of Ireland (BAI) and will also act as an online watchdog. This new agency will be enacted following the passing of the Online Safety and Media Regulation Bill (OSMR). One of its main aims is to protect citizens from the spread of harmful online content. In February 2022 the government launched a new national digital strategy called 'Harnessing Digital – The Digital Ireland Framework' to help progress digital transition across the economy in the wake of the pandemic.

The European Commission has passed a Digital Services Act package which incorporates a Digital Services Act (DSA) and a Digital Markets Act (DMA). According to the Commission⁵⁹ this legislation will create a 'safer digital space in which the fundamental rights of all users of digital services are protected; and establish a level playing field to foster innovation, growth, and competitiveness'. The DSA is based on the 'country of origin' principle and therefore Ireland will be the regulator for

platforms which base their European Union operations here.

The new EU legislation will curb the powers of big tech platforms, regulate illegal content, and require more transparency from digital companies regarding algorithms and moderation. This wide-sweeping package will force big tech to share data with small and medium-sized companies, while limiting the transfer of user data to non-EU countries.

In response to these EU moves, the CEO of Meta, Mark Zuckerberg, has threatened to pull his social media platforms Facebook and Instagram from Europe.⁶⁰ However, in Ireland, Meta has been expanding its European headquarters, building a 14-acre campus in Ballsbridge in South Dublin. The company has announced it plans to hire up to 10,000 workers in Europe to help build the digital 'metaverse'. TikTok, which also runs its European operations out of Ireland, is hoping to avoid these EU regulatory powers by claiming it is a new platform and not a gatekeeper.

In the meantime, Sundar Pichai, the Chief Executive of Google's parent company Alphabet, said⁶¹ Google will 'engage constructively' with the new EU laws on moderation of content. Pichai also said the new international corporation tax regime would make 'no difference at all' to investment plans which would see the company moving 1,000 software engineers into the new Boland's Mills building.

According to *Digital News Report* data for 2022, payment for online news media in Ireland remains relatively stable, with 16% of those surveyed paying an online subscription, a donation, or one-off payment for news. The two media outlets mentioned



Population	4.8m
Internet penetration	92%

most frequently in the survey in terms of ongoing subscription, the *Irish Times* and the *Independent*, appear to be on firmer ground financially in 2022. Mediahuis, the Antwerp-based publisher of the *Irish Independent* and *Sunday Independent* reported a 14% rise in revenue to €1.13bn in 2021.⁶² The *Irish Times* in 2021 made 'an operating profit of €8.3m before exceptional costs in 2020, more than double the €3.8m figure recorded the previous year'. According to Core Estimates,⁶³ the advertising market rebounded strongly in 2021 with 20% growth, and although the market has slowed down since, it is still predicting double digit growth for 2022.

For the first time in Ireland, the smartphone has taken prime position as the first device that consumers reach for to access news in the morning (35%). However, radio is still very strong in comparison to other countries (31%), TV less so (15%), and print comes last (3%). Audio generally is still extremely popular in Ireland, with 46% listening to a podcast on a monthly basis (+five percentage points). While RTÉ and a few other media outlets do create narrative podcasts, most follow traditional talk show formats.

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⁵⁹ <https://digital-strategy.ec.europa.eu/en/policies/digital-services-act-package>

⁶⁰ <https://www.the-sun.com/tech/4629552/mark-zuckerberg-ban-facebook-instagram-europe/>

⁶¹ <https://www.rte.ie/news/business/2022/0428/1294781-google/>

⁶² <https://www.irishtimes.com/business/media-and-marketing/mediahuis-revenues-rise-14-as-digital-subscriptions-surge-1.4811047>

⁶³ Outlook 2022. OneCore.ie

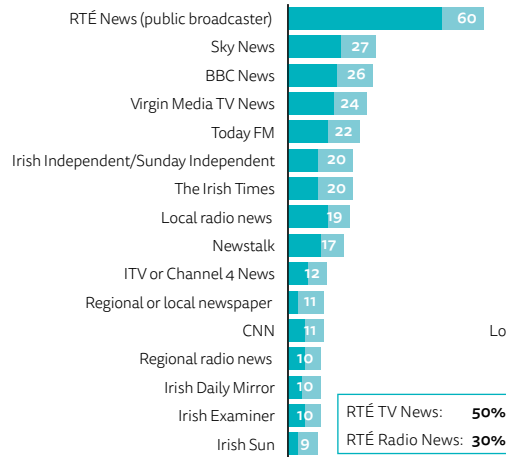
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

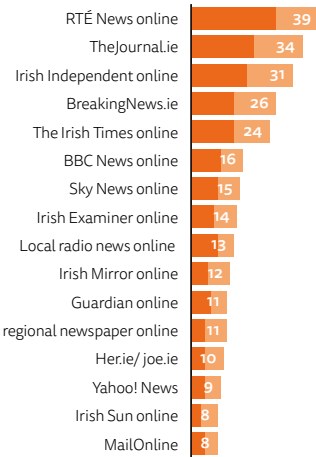
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TV, RADIO AND PRINT



ONLINE

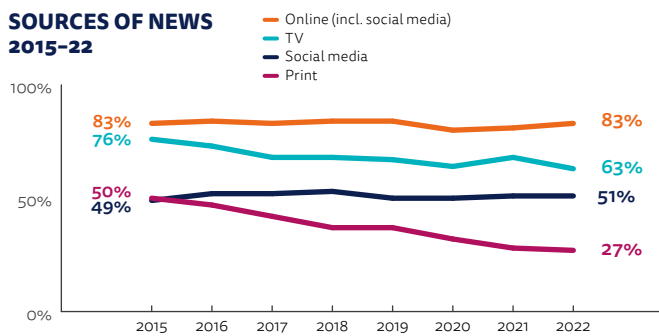


CHANGING MEDIA

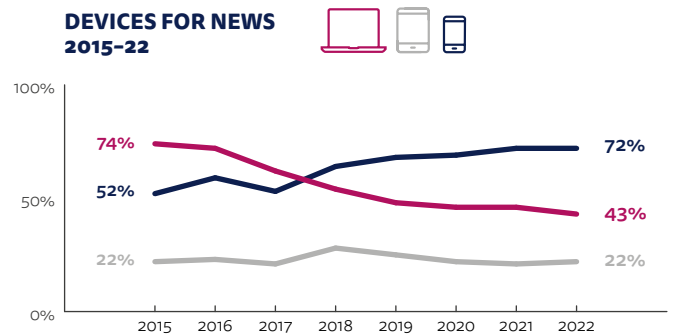
Use of traditional media such as print and television has fallen significantly since 2015, with younger people getting much of their news online or via social media. Almost three-quarters (72%) of our Irish sample access news via a smartphone weekly.



SOURCES OF NEWS 2015-22



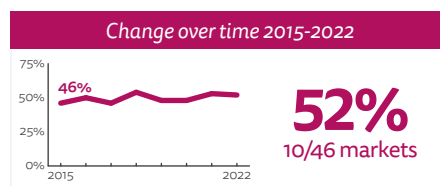
DEVICES FOR NEWS 2015-22



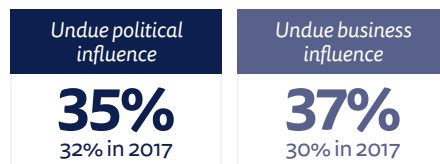
TRUST

Irish media remain relatively well trusted by international standards and overall trust in news has remained stable at 52%. Trust in individual news brands, however, has fallen by between three and six percentage points, reversing last year's COVID-19 inspired rises. Public broadcaster RTÉ remains the most trusted brand (74%), closely followed by the *Irish Times* (71%). The Irish editions of British tabloid newspapers are the least trusted.

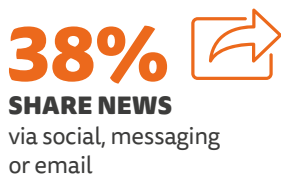
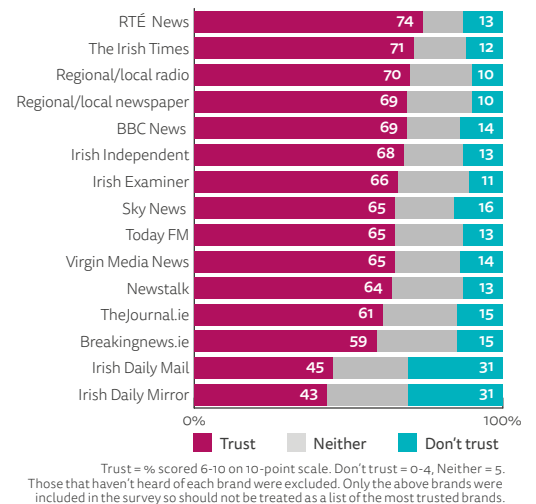
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	33% (-2)	63%	4	Instagram	14% (+2)	41%
2	WhatsApp	22% (-1)	70%	5	Twitter	14% (+1)	27%
3	YouTube	20% (+2)	63%	6	Facebook Messenger	9% (-2)	43%

ITALY

The impact of the digital transition of the Italian media system has finally become evident, with digital-born players reaching the top positions in our ranking, digital advertising revenues becoming predominant, new podcast companies being established, and news kiosks changing the nature of their operations.

Digital disruption has been slower in Italy than in other European media systems. Legacy news organisations have dominated the online news market for many years, with the most popular news outlets in the offline market also being the top players online. In 2022, for the first time, a digital-born outlet, Fanpage, obtained the widest online reach in our survey (21%), surpassing established broadcasters, the main Italian news agency (ANSA), and the most important newspapers. Other digital-born outlets achieving good online results are HuffPost (9%), Il Post.it (7%), and Open (4%). Conversely, the offline news market is still dominated by the main Italian broadcasters (the public service broadcaster RAI and the commercial players Mediaset, StyTg24, and TgLa7), followed by established print outlets such as *La Repubblica* and *Il Corriere della Sera*.

Those digital-born players which have successfully disrupted an otherwise stagnant Italian news industry have often adopted a focus on niches overlooked by more established outlets, younger and more cost-effective newsrooms, and a good balance between traditional and more innovative forms of journalism. Fanpage, for example, relies heavily on social media, celebrity gossip, and crime news to reach younger and larger audiences, but combines this with a track record of high-impact investigations which raises its profile and cross-media visibility. Established in 2011 just as a Facebook page, Fanpage now employs more than 60 journalists and is among the most popular Italian outlets. Similarly, Il Post.it in 2010 identified a niche of young audiences looking for political and international news free of insider jargon and behind-the-scenes details. Since then, it has focused on explainers, combining the new elements of a moving story with the

background required by people coming fresh to the topic. The membership scheme introduced by Il Post.it in 2019 – a rare, if not unique, case among digital-born outlets in Italy – has recently reached 50,000 subscribers and has made it sustainable, according to its founder.⁶⁴ ANSA, an established news agency which also provides its news online to the general public, has recently implemented a metered paywall.

The impact of the Italian digital transition is also evident in the changing market structure. Online advertising revenues overtook television advertising revenues for the first time in 2019, and now represent almost half (49%) of overall advertising revenues. This is a breakthrough in a media system traditionally marked by a particularly strong television sector, a weak newspaper industry, and an internet penetration that has developed more slowly than in other European countries. However, more than 80% of Italian online advertising revenues are generated by the top online platforms, notably Google and Facebook/Meta, with news media facing a general decline. In 2020, total revenues for the Italian media sector fell by over €1bn, with serious declines across the television, radio, newspaper, and magazine sectors.⁶⁵ Newspapers have suffered the most, with a 31% four-year drop in the total number of print and digital copies sold.⁶⁶

The suffering Italian magazine sector has seen major changes. *L'Espresso*, the famous centre-left Italian weekly, was sold in March 2022 by its owner, GEDI, which publishes newspapers such as *La Repubblica* and *La Stampa*. GEDI was in turn bought last year by the Agnelli-Elkann family (the largest shareholder in Stellantis, the enlarged Fiat/Peugeot car conglomerate).



Population	59m
Internet penetration	93%

The La Verità group, founded by Maurizio Belpietro, the former editor-in-chief of several conservative newspapers, has also recently bought the important centre-right weekly *Panorama* and the popular women's magazine *Donna Moderna*. The company's main newspaper *La Verità* has started differentiating itself from mainstream conservative newspapers by adopting 'alternative' positions on sensitive topics such as vaccines, anti-COVID measures, and economic sanctions against Russia.

A podcast company, Chora Media, was established in 2020 and has recently introduced high-quality reportage from Ukraine such as *Stories*, the podcast series by the journalist Cecilia Sala. A final element symbolising the digital disruption of the Italian news industry is in the Italian news kiosks, the outdoor stands where print newspapers and magazines have traditionally been sold. 1,500 Italian news kiosks (10% of the total) closed in the first six months of 2020, while many others have branched out, for example by providing access to public services, such as issuing official ID cards, or selling food and drink.

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Dublin City University

⁶⁴ <https://pressgazette.co.uk/interview-il-post-luca-sofri/>

⁶⁵ <https://www.agcom.it/relazioni-annuali>

⁶⁶ <https://www.agcom.it/osservatorio-sulle-comunicazioni>

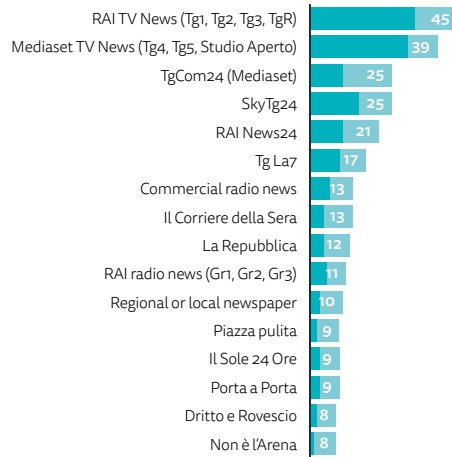
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE



CHANGING MEDIA

Newspaper readership continues to fall steadily. Television news viewership has also declined slightly but is holding up better than in many other countries. The smartphone is the main device used to get online news.

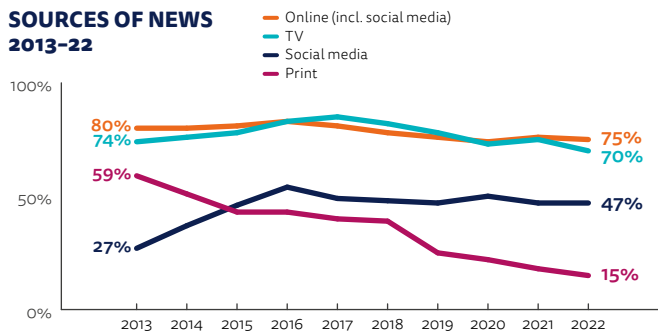
12% pay for **ONLINE NEWS**



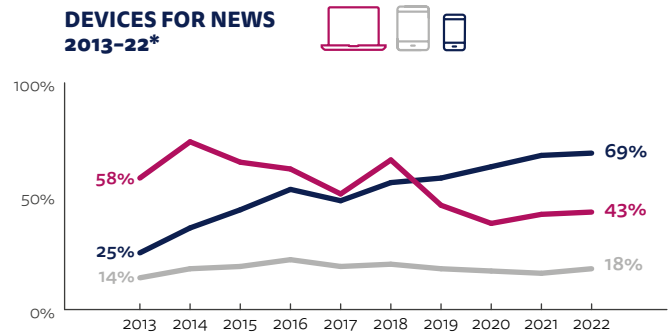
29% listen to **PODCASTS** in the last month



SOURCES OF NEWS 2013-22



DEVICES FOR NEWS 2013-22*

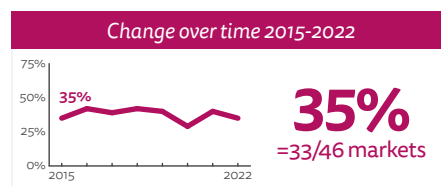


* 2018 figures for computer use were likely overstated due to an error in polling

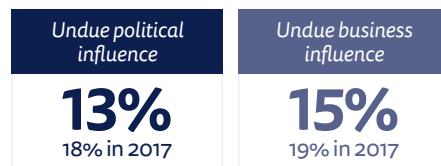
TRUST

Trust in news has declined and is particularly low, with just 13% and 15% thinking that Italian media are independent from undue political and business influence, respectively. Trust in individual brands has also decreased, with outlets known for their political partisanship and Fanpage being the least trusted.

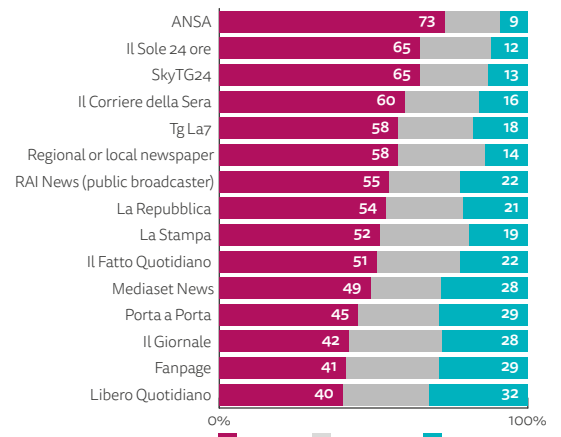
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

36% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	45% (-5)	71%	4	Instagram	18% (+3)	50%
2	WhatsApp	26% (-4)	81%	5	Telegram	9% (+2)	32%
3	YouTube	21% (+1)	65%	6	Twitter	8% (-)	17%

NETHERLANDS

The Dutch news market is characterised by a strong public service broadcaster (PSB) and highly concentrated newspaper ownership, with two Belgian companies owning the largest titles. While the advertising market recovered from the COVID-19 crisis, the year was also characterised by increased polarisation, several attacks on journalists, and the launch of a new right-wing public broadcaster.

The news boost from the COVID-19 pandemic has begun to wane. Interest among older groups has returned to 2020 levels but the percentage of 18–24s who were ‘very interested’ in news dropped from 51% in 2020 to 39% in 2022.

The digital advertising market recovered after a COVID-19 slump. Although tech giants Facebook and Google benefited most, TV ad-spending reached a new peak in 2021. The two Belgian publishers that dominate the Dutch news market, Mediahuis (owners of *De Telegraaf* and *NRC*) and DPG Media (owners of papers such as *AD* and *De Volkskrant*) saw their revenues increase. Their dominance prompts worries about pluralism within the Dutch media.

Willingness to pay for online news stabilised at 17%, but some companies reported significant progress. Newspaper *NRC* hit a record number of print and digital subscribers in 2021,⁶⁷ and *De Volkskrant* has seen its digital subscribers increase by almost 20% in two years.

The biggest online news source Nu.nl – acquired in 2019 by DPG Media – now requires a login to access in-depth articles, podcasts, and videos from DPG’s newspapers. The strategy is to preserve free access through charging more for targeted ads. DPG Media has followed Mediahuis in ending its collaboration with Blendle, the pioneering Dutch online news aggregator, raising questions about its future.

A rise in violence against journalists culminated in the murder of crime reporter and TV-personality Peter R. de Vries. Other attacks included a Molotov cocktail-attack at the home of local journalist Willem Groeneveld and attacks on journalists by activists against COVID restrictions and at soccer games. The government and

police are supporting PersVeilig, an initiative to help protect journalists from violence and aggression.

Sexual misconduct in the media drew huge attention after a series of reported incidents at reality TV show *The Voice of Holland*. The FNV Media & Culture trade union has opened a hotline to report incidents.

Dutch PSB remains in a strong position with NOS the leading and most trusted news brand. But the past year saw attempts to use the uniquely open Dutch PSB system to disrupt the status quo. Under this system NOS (focused on news, parliamentary reporting, and sports), and NTR (responsible for cultural, educational, children’s, and ethnic programming) both have a privileged legal status with ring-fenced funding. But the overall system is administered and funded by the Nederlandse Publieke Omroep (NPO) which also awards five-year renewable licences and funds to the 11 member-based public broadcasters running the other PSB TV and radio channels. While most of these member-based PSBs are nearly 100 years old, organisations representing new political or cultural segments can apply, with a threshold of 50,000 members as the most important criterion to enable public funding and guaranteed airtime.

In 2021 two new organisations, Omroep Zwart (Network Black) and Ongehoord Nederland (Unheard Netherlands) met the criteria and were appointed by the minister as ‘aspirant’ public broadcasters. They represent very different interests: Omroep Zwart (OZ) aims to make inclusive programmes, representing more diverse minorities (whether in terms of ethnicity, sexual preference, or people with disabilities). The other, Ongehoord Nederland (ON), aims to represent right-wing people who do not feel represented by the existing broadcasters.



Population	17m
Internet penetration	96%

ON has had a bumpy start since it started broadcasting in early 2022, claiming to stand for ‘free, plural opinions and preservation of Dutch culture’ and against ‘political correctness’. ON’s campaign had been endorsed by right-wing politicians Geert Wilders and Thierry Baudet, who accused the Dutch public broadcaster of ‘propaganda’ and ‘fake news’.⁶⁸ ON’s early broadcasts drew formal complaints about disinformation, lack of impartiality, and racism, which if upheld could lead to loss of the licence. However, ON’s launch has prompted bigger questions about the sustainability of the current member-based PSB system, free speech versus (protection from) disinformation and discrimination, as well as the possible impact on trust in public broadcasting.

**Irene Costera Meijer and
Tim Groot Kormelink**
Vrije Universiteit Amsterdam

⁶⁷ <https://www.mediahuis.nl/mediahuis-behaalt-opnieuw-sterk-resultaat-in-2021-dankzij-focus-op-onafhankelijke-journalistiek-en-doorgedreven-digitalisering/>

⁶⁸ <https://nos.nl/artikel/2311959-ongehoord-nederland-na-1-dag-op-18-000-leden-50-000-nodig-zou-ongehoord-zijn>

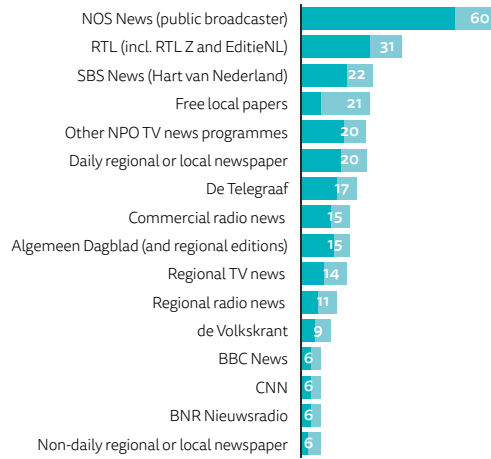
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

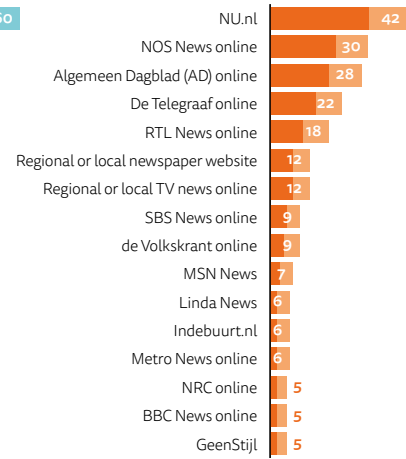
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TV, RADIO AND PRINT



ONLINE

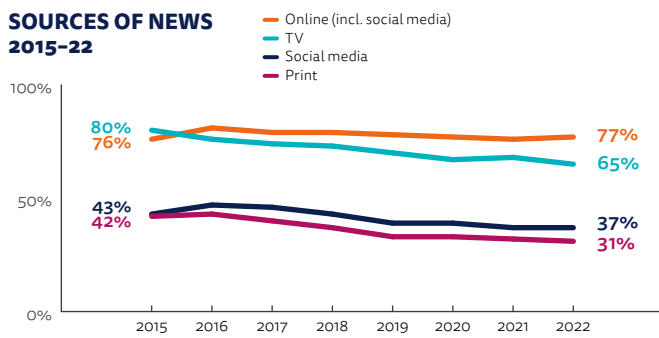


CHANGING MEDIA

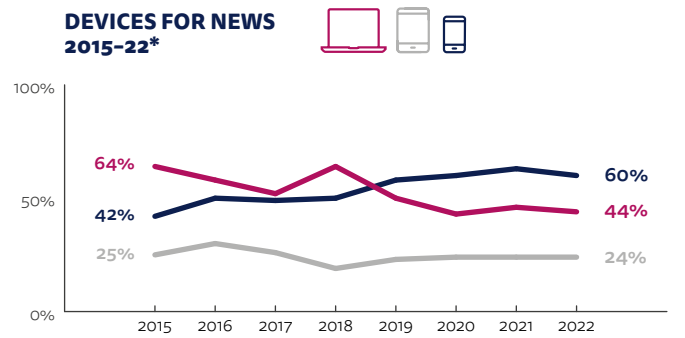
Sources and devices for news remain stable with public broadcaster NOS and free, ad-driven Nu.nl still dominant, respectively, in offline and online news use. Our data show that nearly one-third of people listened to a podcast in the past month.



SOURCES OF NEWS 2015-22



DEVICES FOR NEWS 2015-22*

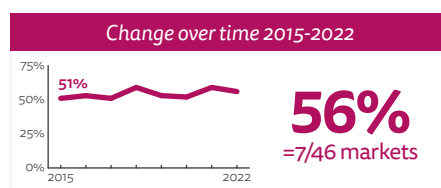


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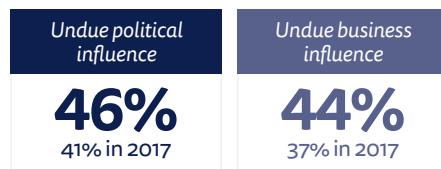
TRUST

Although the percentage of people who think media are independent from undue political or government influence (+ five percentage points, pp) or undue business or commercial influence (+7pp) has risen since 2017, trust is down slightly in 2022. Public broadcaster NOS still has the highest trust score (77%), along with regional and local newspaper brands (74%).

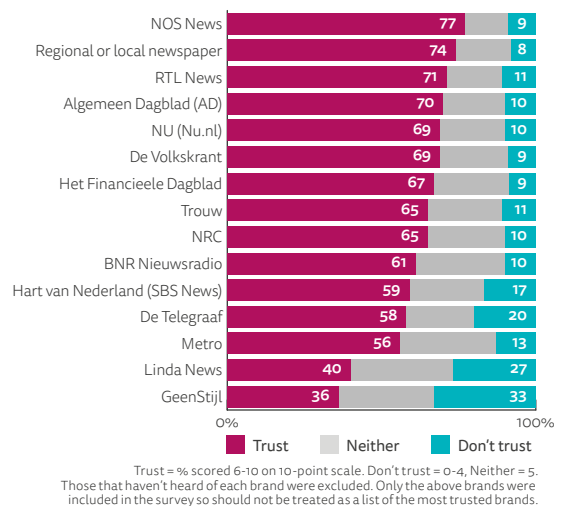
OVERALL TRUST SCORE



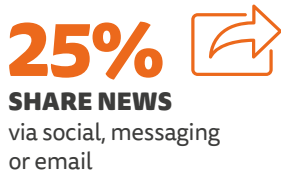
MEDIA IS FREE FROM ...



BRAND TRUST SCORES



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TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	27% (+1)	61%	4	Instagram	10% (-)	34%
2	WhatsApp	19% (-3)	75%	5	Twitter	7% (-1)	14%
3	YouTube	14% (-1)	50%	6	LinkedIn	5% (-)	20%

NORWAY

The Norwegian media landscape combines strong national publishers and public service media with a reputation for innovation in content and business models. In the wake of the pandemic, Norwegian media still lead the field in payment for news online, despite some decline in use of and trust in news.

Norway remains the country with the highest number of consumers (41%) willing to pay for online news, but with evidence from our survey (down four percentage points, pp) and in some industry data that growth may have reached a saturation point.⁶⁹ The national titles that our paying respondents cited most often were VG, *Aftenposten*, and *Dagbladet*, but over half (53%) of them are paying for local titles. Given Norway's strong tradition of reading print newspapers, the transition to digital subscriptions has been promoted with hybrid solutions that typically bundle paper and digital content. This, and the absence of freesheets, helps explain why Norway has established the lead in our survey in paying for online news. A related issue for the success of subscription strategies is the willingness to register or set up an account to access news. Almost four in ten have done so, which is the third highest in our survey, and 26% have registered with more than one provider. Many more respondents (44%) trust news websites to use their personal data responsibly than trust social media to guard privacy in this regard (34%).

The smartphone is by far the most used device for news, and as many as 43% reach for their phones to get the first news in the morning (up from 32% in 2019), compared to just 5% who go to print. This shows not only a digitally savvy market, but in light of willingness to pay, brand use, and trust measures, it illustrates how legacy brands have managed to reinvent their journalism for a new medium and succeeded surprisingly well in bringing paying users with them.

In contrast to many countries, Norwegian established news media fared well economically through the pandemic and avoided layoffs. Swift public emergency

subsidies during the pandemic helped – and in some cases ended up being returned as news providers experienced less damage than expected. Ad revenues have been fluctuating, but by early 2022, ad agencies reported substantial increases in digital sales, expecting the ad market to have bounced back after the pandemic downturn. As evidence of a generally optimistic outlook for journalism, key news providers have continued the shift to digital-only, and by early 2022, Schibsted (which owns VG and *Aftenposten*, for instance) claimed to be 'digitally sustainable', meaning it is no longer reliant on print news income.

Public service broadcaster NRK kept its leading position in television and radio news and remains a much used and highly trusted brand online – beaten only by Schibsted's VG online. While both NRK and VG see slight decrease in reach, the group of most used brands, and their ranking, remains stable. On the back of a government-initiated review of the NRK's contributions to media diversity, the long-lasting debate about the public service broadcaster's online activities resurfaced this year, with stronger calls from commercial media to restrict NRK's online provision.

This year we saw a continued professionalisation and promotion of podcasts in Norway, with commercial brands acquiring established podcast stars, and the NRK more actively pushing their audio programming as podcasts. Usage of podcasts has continued to grow: 42% of Norwegians have listened to a podcast during the last month (up 6pp since 2020), and among the under 35s, the increase is as much as 9pp. The increase is particularly notable for podcasts on specialist issues, such as business, science, and health.



Population	5.4m
Internet penetration	98%

Among the recent and ongoing global crises that news focuses on, the climate crisis is still getting attention among Norwegians. Seven in ten say they pay attention to this issue, with documentaries standing out as a preferred source. Still, two out of ten state they don't pay attention to climate change and a plurality agrees that news should reflect a range of views on the issue, rather than taking a clear position.

Hallvard Moe
University of Bergen

⁶⁹ https://www.mediebedriftene.no/siteassets/bilder/rapportbente/mbl_betalingfornyheter_rapport_2021.pdf and https://www.mediebedriftene.no/siteassets/dokumenter/tall-og-fakta/mbl_rapport_betalingfornyheter_2020_del1_endelig.pdf

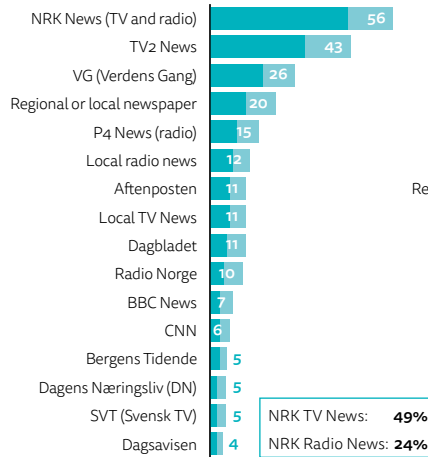
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

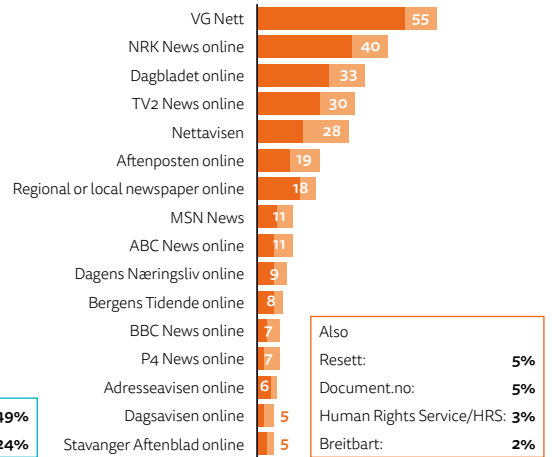
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TV, RADIO AND PRINT



ONLINE

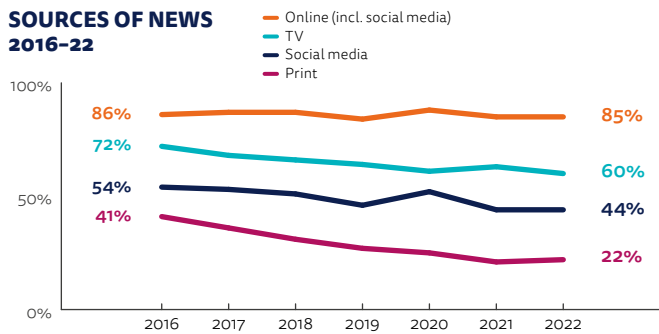


CHANGING MEDIA

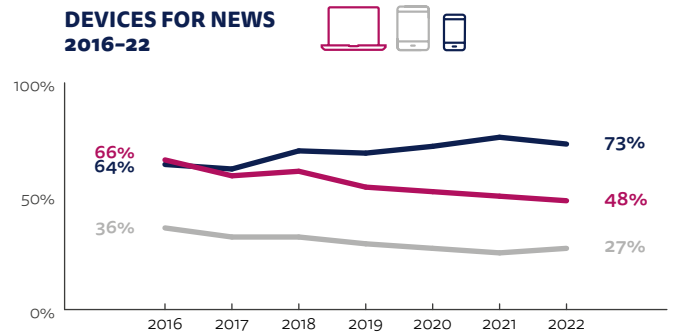
After two years of COVID-19, consumption amongst the main news brands has levelled off. TV has seen a small drop since 2021 (-3pp), but online, social media and print seem to be plateauing - meaning the decline in print appears to have halted.



SOURCES OF NEWS 2016-22



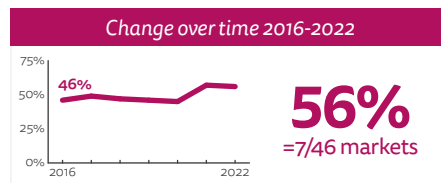
DEVICES FOR NEWS 2016-22



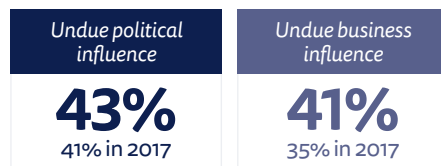
TRUST

Norway regularly scores highly on trust and in 2022 records low levels of news polarisation and cynicism. Trust in news overall is only marginally down (-1pp) after the bump during the height of the COVID-19 pandemic. All major news brands have seen some decrease in trust levels, while so-called alternative news sites (Document and Resett) saw a marginal increase.

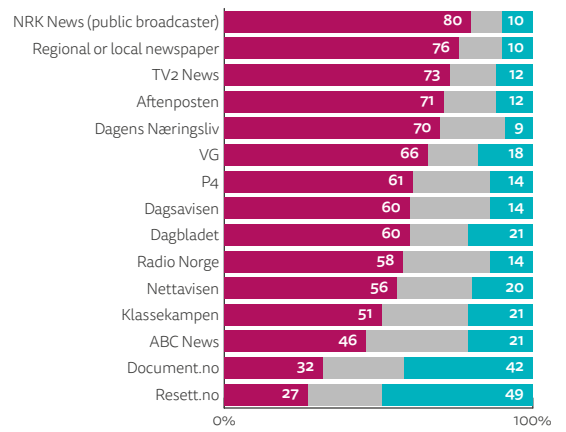
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



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SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News (%)	For All (%)
1	Facebook	31%	73%
2	YouTube	12%	55%
3	Snapchat	11%	50%

Rank	Brand	For News (%)	For All (%)
4	Facebook Messenger	11%	56%
5	Instagram	9%	48%
6	Twitter	5%	15%

POLAND

The war in Ukraine and the accompanying refugee crisis has led to a surge in news consumption across TV and digital channels. Before the conflict it was a different story, with declining interest in news and increased government pressure on independent media outlets.

The Ukraine crisis has dominated TV screens ever since Russia's invasion of Poland's neighbour. Harrowing images of executed civilians lying on the streets of Bucha with their hands tied caused shock among Poles who took over 3 million refugees into their homes. But the current crisis is unlikely to obscure the deep divisions in Polish society and politicisation of previously independent media. The purchase of *Polska Press* from its previous German owners by the state-owned oil company Orlen means Orlen is the largest publisher of regional dailies in Poland. Alongside a name change to *Orlen Press*, one of the most dramatic impacts was a management clearout. By May 2021, less than five months after the deal, 15 out of 16 editors had been dismissed, with replacements often recruited from pro-government media outlets, like *Gazeta Polska*, or the public service broadcaster, TVP. In some cases, the fall in editorial standards was immediately evident. An editorial in the regional newspaper *Dziennik Zachodni* contained 39 typos, including one in the editor's surname.

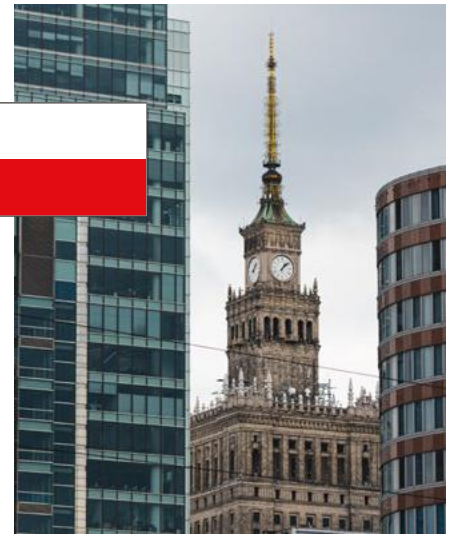
The take-over was the first major step in the 'repolonisation' of media promised by the ruling party. It was followed by proposals by some ruling party MPs, designed to bar companies from outside the European Economic Area (EEA) from owning more than a 49% stake in Polish media, in an attempt to oust US-based Discovery Communications from Poland. The target was TVN, the second commercial TV broadcaster which is wholly owned by Discovery. The bill was ultimately vetoed by the Polish president, but had it passed Discovery would have faced the forced sale of 51% of its stake in TVN, valued roughly at \$1bn⁷⁰ or meant that TVN and TVN24 – the most watched news channels and those

most critical of the government – would have lost their licences. Since the bill was submitted to the Parliament while TVN24 was awaiting a licence renewal which was delayed by the regulator, the National Broadcasting Council, the owners faced great uncertainty and pressure to sell. They applied for a satellite licence for TVN24 in the Netherlands before their Polish licence was finally renewed.

Dubbed by the Polish media 'Lex TVN', the bill sparked street protests. Even after the presidential veto, the regulator repeatedly delayed the licence renewal for another TVN subsidiary, TVN7, with a positive decision just days before its expiry, in February 2022.

There was a similar standoff between the government and a foreign owner with Radio Zet, Poland's second-largest commercial broadcaster. The antitrust authority barred Agora, which owns the liberal daily *Gazeta Wyborcza*, from buying the radio network. The regulator objected that the merger would create a duopoly that could limit competition in the radio market. Agora said the decision 'protects its competitors, not competition'.⁷¹ When the deal was first proposed in 2020, the government criticised it as a threat to Polish media pluralism because of George Soros' indirect ownership of 11.5% of the shares in Agora through his Media Development Investment Fund.

Newspapers suffered as their paid circulation dwindled and the price of paper skyrocketed. That cut margins and drove consolidation. After nearly three decades of operation, Swiss publishing house Edipresse sold their Polish media assets to Burda Media. Legal pressures added to financial ones. According to the NGO the Journalism Society (Towarzystwo Dziennikarskie), 187 lawsuits or SLAPPs (strategic lawsuit against public



Population	38m
Internet penetration	78%

participation) were filed against independent media and journalists by individuals or entities associated with the state from 2015 to 2021. Additionally, in September 2021, the government limited access to the Belarus border on grounds of a state of national emergency following the migrant crisis. Those who continued reporting from there were arrested and charged with breaching the state of emergency.⁷²

Deepening conflict between the government and media pushed Poland further down in the World Press Freedom Index compiled by Reporters Without Borders (RSF) and fuelled polarisation.

While legacy media were struggling with the pandemic's economic impact and growing political pressure, their users shifted their attention to digital entertainment. According to 'Digital Consumer Trends 2021' by Deloitte, 66% of Polish consumers pay for video content online (compared to 55% in 2020). The percentage will probably increase in 2022 as Amazon Prime and Warner Media have already launched in Poland, and Disney+ is expected to follow soon.

Vadim Makarenko

Director of Research Digital at Statista GmbH, former journalist at *Gazeta Wyborcza* and former Reuters Institute Journalist Fellow

⁷⁰ <https://variety.com/2021/tv/global/discovery-poland-tvn-sale-media-1235136768/>

⁷¹ <https://notesfrompoland.com/2021/01/08/polands-antitrust-authority-stops-radio-group-merger-over-competition-concerns/>

⁷² <https://cpj.org/2021/09/polish-authorities-charge-2-journalists-with-violating-state-of-emergency-in-coverage-of-belarus-border-area/>

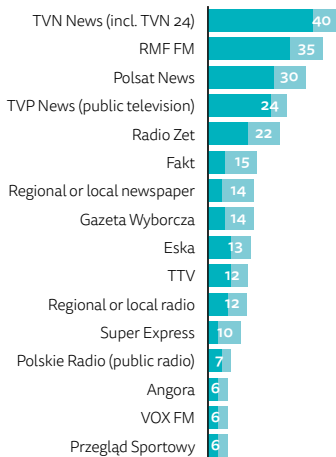
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

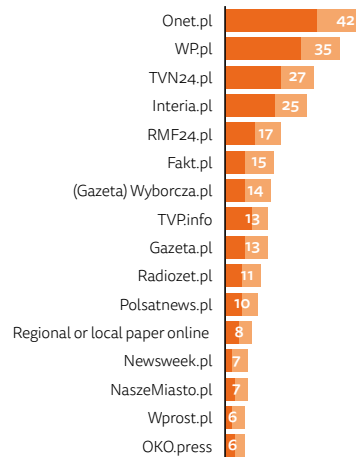
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TV, RADIO AND PRINT



ONLINE

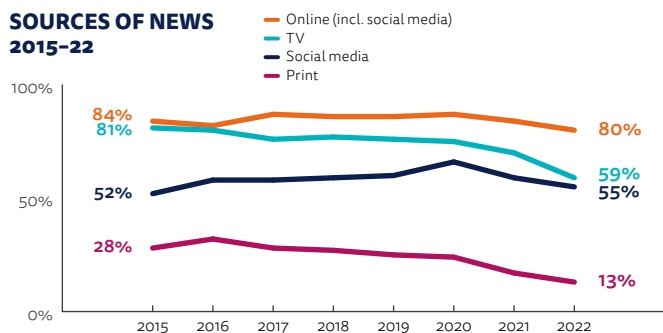


CHANGING MEDIA

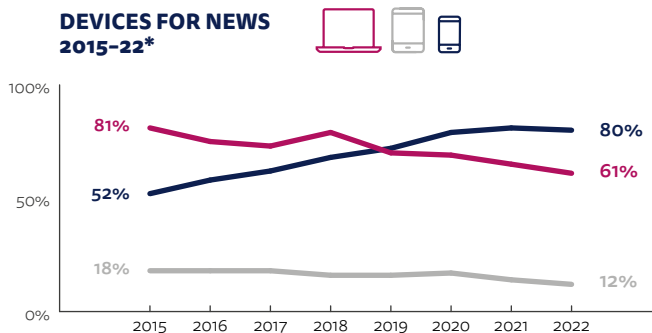
News interest continued to fall at the time of our main survey with declines in all news sources. That partly explains the lower percentage of people paying for online news. The smartphone remains the main device for accessing news.



SOURCES OF NEWS 2015-22



DEVICES FOR NEWS 2015-22*

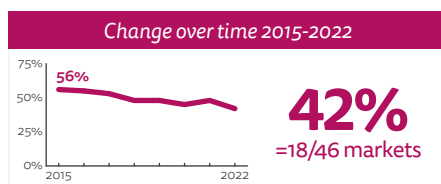


* 2018 figures for computer use were likely overstated due to an error in polling

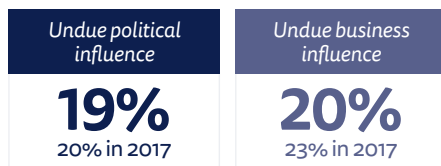
TRUST

Only around 20% see media as independent from political or commercial pressures. Brand-level trust has fallen since 2021, though with stark differences between trust in independent media compared to the state-controlled public broadcaster TVP which has twice as many people distrusting (49%) than trusting it (24%). Pro-government Gazeta Polska and tabloids (Fakt and Super Express) are also near the bottom.

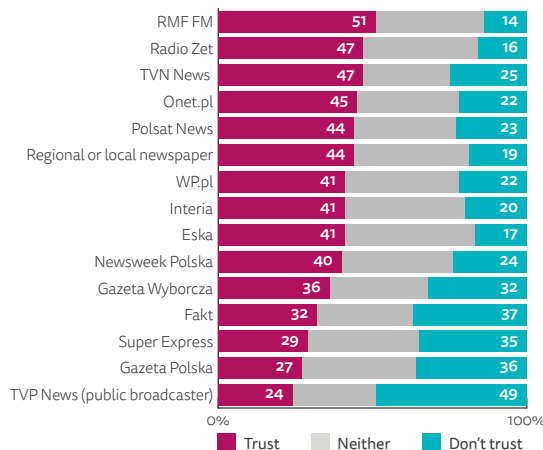
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



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34%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
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2	YouTube	33% (-2)	70%	5	Instagram	12% (-1)	33%
3	Facebook Messenger	21% (-4)	61%	6	TikTok	7% (+3)	18%

PORTUGAL

In the aftermath of the pandemic, and with trust in news still high (2nd in 46 markets), overall interest in news fell significantly. Meanwhile, the rebranding of Media Capital-owned TVI24 news channel into CNN Portugal has changed competitive dynamics in a very packed market for TV news channels.

As media companies were still trying to come to terms with the impacts of the pandemic and the necessary changes to business models, 2022 started with damaging cyberattacks on several Portuguese media, including brands such as SIC, SIC Notícias, and *Expresso*. On the revenue side, however, despite the continuing decline in print income, Grupo Cofina, owner of *Correio da Manhã* daily newspaper and the *Correio da Manhã* TV news channel, reported profits for 2021 up by 165% (or €4.2m) on 2020. Grupo Globalmedia (*Diário de Notícias* daily and the TSF radio station) reported sales up by roughly 9% on 2020.

In the radio sector, Renascença Multimédia (Rádio Renascença and RFM radios) launched a new podcasting platform (Popcasts), both for their own podcasts and with the aim of attracting other publishers. Rádio Comercial, one of the market's biggest players (24% weekly reach), launched Rádio Comercial Ucrânia, a bilingual digital radio aimed at refugees from the Russian-Ukrainian war living in Portugal.

In the TV market, Grupo Media Capital underwent structural changes which included the rebranding of the TVI24 news channel as CNN Portugal. Despite concerns that this might damage Media Capital's position in the very competitive TV news market, in early 2022, in the wake of coverage of the Russian invasion of Ukraine, CNN Portugal overtook its main competitor, Grupo Impresa's SIC Notícias, to become the most watched TV news channel. During 2021, Media Capital also completed the sale of its radio network (Rádio Comercial, M80, Cidade, Smooth, and Vodafone) to the German media group Bauer for nearly €70m.

At the end of 2021, Google unveiled their Google News Showcase initiative in Portugal, in a partnership with about 30 media companies, including many of the biggest brands such as *Jornal de Notícias*, *Observador*, *Público*, *Visão*, and an assortment of regional outlets. Brands that were left out were unhappy and, as elsewhere, the initiative has fuelled discussion around news monetisation models in the age of platforms and the power big players have as massive distributors of content.

Legacy print brands have tried to come up with strategies to meet the demands of audiences in the digital age. The 2019 Nonio initiative brought together all the major Portuguese news brands to create a single login system and might be one of the explanations for our data showing Portugal with a high proportion of people signing into news sites. But payment for news online remains relatively low at 12% (though the main publications report an increase in their digital paid circulation).

Digital piracy is another challenge. In November 2021, a Portuguese court ordered the shutdown of 17 Telegram channels due to illegal sharing of PDF newspapers, magazines, and audiovisual content – which together involved about 10m users. Alongside legal redress, the industry is running campaigns highlighting the impact of these practices on media companies and, indeed, journalism.

A big drop in interest in news also marked this year's trends (down 18 percentage points, pp, from 2021) possibly due to what some saw as the excessive focus of news agendas on yet another COVID-19 wave over December 2021–January 2022. Researchers have found that COVID-related news saturation can shift audiences towards



Population	10.3m
Internet penetration	78%

lighter content, either other kinds of news or entertainment (de Bruin et al. 2021).

With disinformation remaining topical, a new law came into force in May 2021, creating a Portuguese Charter on Human Rights in the Digital Age. Alongside ensuring basic rights, freedoms, and guarantees for citizens in the online environment, the legislation establishes that the state must protect citizens from people who produce, reproduce, and disseminate misinformation, in line with the European Action Plan against Disinformation. The law also provides citizens with a right to take complaints about misinformation to the media regulator. A controversial Charter of Digital Rights was criticised by experts, journalists, and some political parties, with some saying it marked a 'return to censorship'.

Ana Pinto-Martinho, Miguel Paisana, and Gustavo Cardoso

ISCTE-IUL University Institute of Lisbon

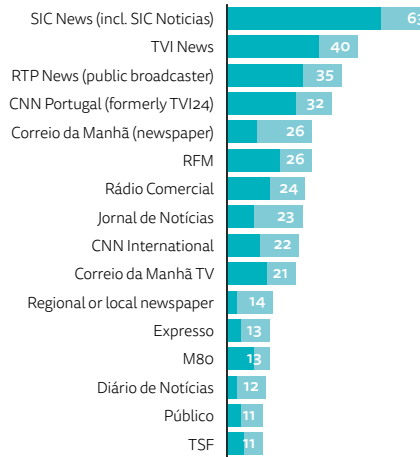
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

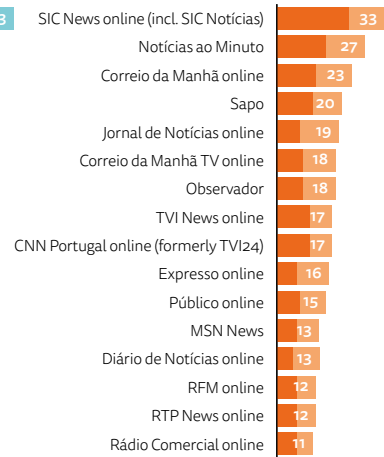
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

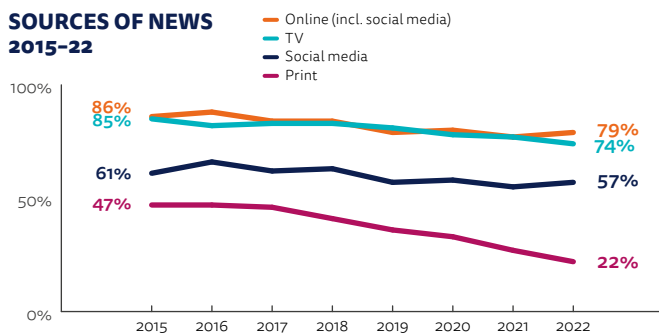


CHANGING MEDIA

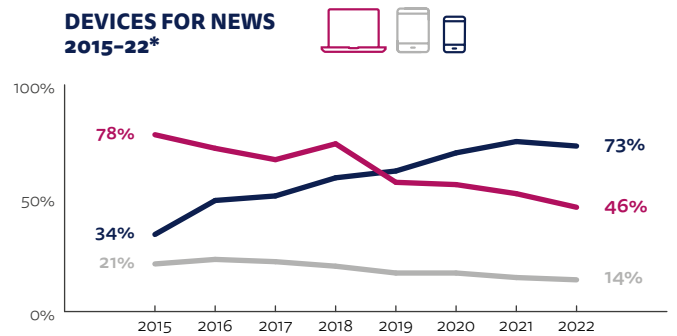
Television declined as a source of news in the past year (down 5pp) as online (including social) has overtaken it. Print's continuous decline means the percentage using it today is half of what it was in 2015.



SOURCES OF NEWS 2015-22



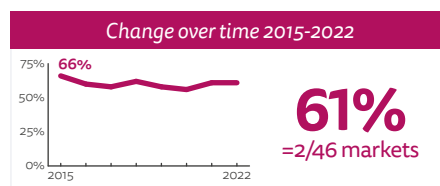
DEVICES FOR NEWS 2015-22*



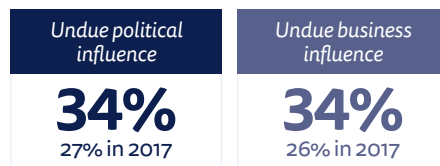
TRUST

Trust figures remain high, as in previous years, with public broadcaster RTP the most trusted brand. However, only about a third of respondents believe media are independent from external influence, whether commercial or political. The Portuguese remain very concerned about what is real and fake online (71%), with COVID-19 still the topic where people encounter misinformation most often online.

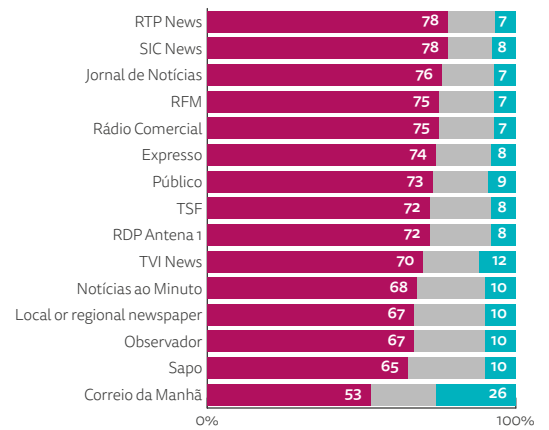
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

48%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	49% (+1)	76%	4	Instagram	20% (+6)	53%
2	YouTube	24% (+4)	68%	5	Facebook Messenger	15% (+1)	51%
3	WhatsApp	24% (+3)	67%	6	Twitter	7% (-4)	15%

ROMANIA

Lawsuits used to prevent public interest stories, political propaganda money used to buy media goodwill, a media blacklist published by a party, and public broadcasters under interim management: clearly, 2021 was not a good year for journalism in Romania. The collapse in media trust and in interest in news, way below pre-pandemic levels, also demonstrate that media legitimacy was affected.

Media freedom was a more than usually politicised issue in 2021, as the parties decided to end the 2020 pandemic political truce. Public figures agreed to support media freedom if journalists were telling the truth: their truth.

Meanwhile the re-emergence of politics led to the collapse of the governing coalition in September 2021 and the main ruling Liberal party invited its traditional rival, the Social Democrats, to join it in government. One of the opposition parties, the Alliance for the Union of Romanians (AUR), with a right-wing, populist platform, tried to gain political capital by campaigning against vaccination, received negative coverage and decided to compile and publish their own media blacklist on Facebook.

Other parties used public money to buy media goodwill. Radio Free Europe revealed that €12.2m were paid in 2021 alone by the main two political parties for ‘media and propaganda’, even though there were no elections. These funds come from subsidies for parliamentary parties but were spent with zero transparency about how contracts were granted or to whom.

If goodwill could not be bought, parties used other methods. Journalists from *Libertatea*, for example (7th amongst our offline brands), were sued in a series of strategic lawsuits against public participation (SLAPP) type of trials. SLAPPs were increasingly adopted as the *modus operandi* for politicians, when trying to stop public interest news from being published. There were other forms of intimidation too – from public shaming and online trolling to death threats. In September 2021, two journalists and a media activist who were documenting illegal deforestation were beaten, robbed, and threatened with torture.

The traditionally highly politicised Romanian public service media (PSM) also faced a turbulent year. In May, the Parliament discussed and rejected the annual reports for the public television, TVR, and the public radio, Radio România, for 2017–19. The chief executives and management boards were dismissed and replaced with temporary leaders in a procedure found illegal by the Constitutional Court. From May until November, when new management was finally appointed, these PSMs were managed by interim leaders with limited powers, and, for a while, had no management at all.

The news market is largely dominated by companies with either Romanian, Czech, or Turkish ownership, as Western media companies gradually withdrew. *Libertatea*, a title of the Swiss media company Ringier, remains the only example in our brand list of Western investment. Pro TV, our leading brand, is owned by Central European Media Enterprises, a Czech-owned company. While ownership *per se* does not imply good or bad journalism, some local owners of leading brands had close political links and occasionally ended up in court – the most recent case being a corruption lawsuit from 2021, against Cristian Burci, the owner of *Adevărul* newspaper and website. There are Romanian owners who try to navigate the turbulent economic and political times and safeguard the integrity of their reporting, as is the case with HotNews, 4th among our online brands.

The commercial media picture improved as people returned slowly from working at home and the economic recovery started. The 2021 figure for media revenues is the highest since before the 2008–9 financial crisis – an achievement of a kind.⁷³



Population	19.5m
Internet penetration	74%

The only mainstream media organisation with a paywall is the financial newspaper, *Ziarul Financiar*.

There has been an encouraging development with the emergence of niche outlets, including some specialising in investigative reporting. Several of these digital-born brands, such as Recorder, Rise Project (which reach 11% and 7% respectively) along with PressOne, which blends investigative and narrative journalism, are donation funded. These newsrooms play an important role in contributing to the quality of the Romanian public sphere in the face of extreme pressure and enjoy considerable support, both moral and financial, from their audiences.

Raluca-Nicoleta Radu

University of Bucharest & European University Institute

⁷³ Advertising revenues in 2021 are estimated at about €510m, of which 64% for TV and 24% for digital. See Initiative Media, Media Fact Book Romania 2021. www.mediafactbook.ro.

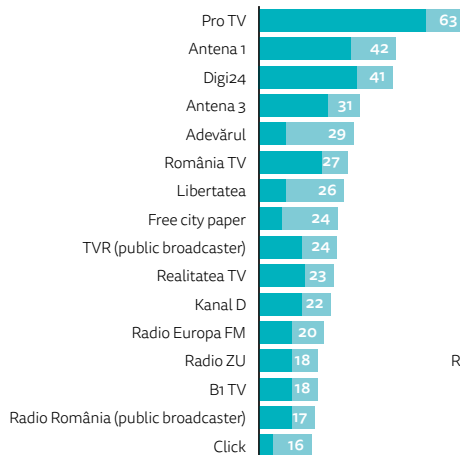
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

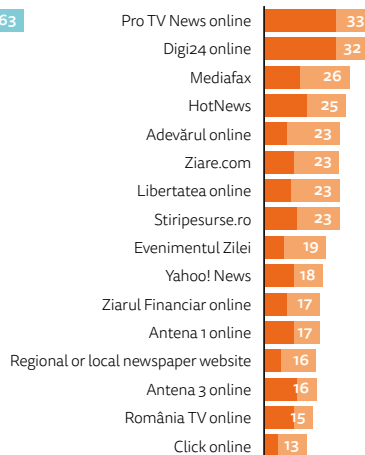
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

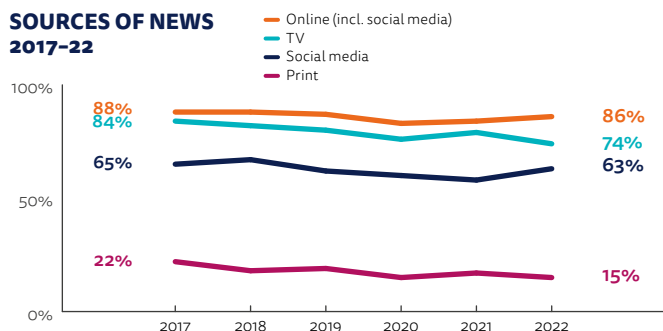


CHANGING MEDIA

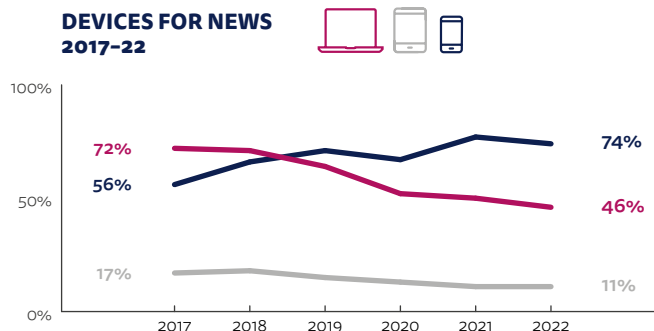
Mainstream news consumption, online and offline, declined below pre-pandemic levels, and use of social media as a source has increased. The 24-hour TV news channel Digi 24 dropped six percentage points (pp) in brand usage compared with last year.



SOURCES OF NEWS 2017-22



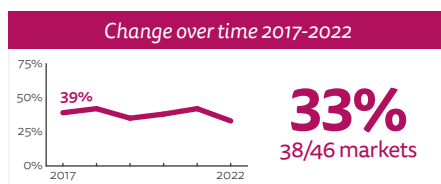
DEVICES FOR NEWS 2017-22



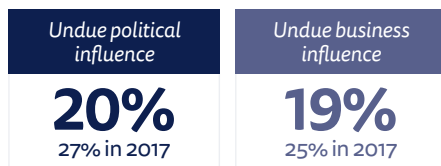
TRUST

Trust in news overall dropped by 9pp to 33%. Trust also fell for most brands, whether public media or privately owned. Further declines in the proportion thinking media were independent of political or business interests may have been driven by revelations about public money being used to buy media goodwill and by legal actions to put pressure on journalists.

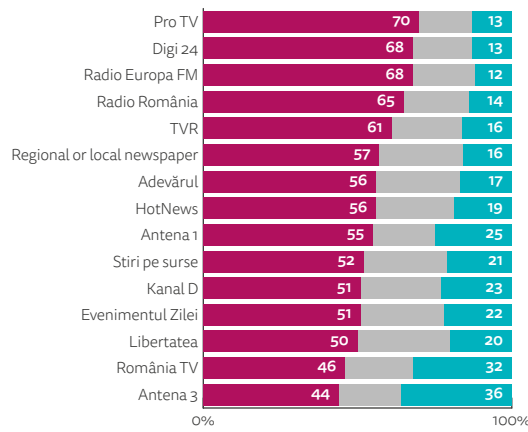
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	63% (+3)	81%
2	YouTube	36% (-2)	75%
3	WhatsApp	31% (+3)	72%

Rank	Brand	For News	For All
4	Facebook Messenger	20% (+1)	53%
5	Instagram	14% (+1)	39%
6	TikTok	10% (+3)	30%

SLOVAKIA

With press freedom and protection of reporters under close scrutiny at home and abroad, the centre-right coalition government struggled to enact its legislative programme to increase media ownership transparency and combat disinformation and online abuse. Trust in the media hit a new low, and Slovaks turned away from television as a news source.

The replacement of Prime Minister Igor Matovič by his party colleague Eduard Heger in April 2021 has prompted changes in some areas of media policy, whereas others stayed on track. One minor casualty was the quiet abandonment of Mr Matovič's much criticised proposal for a monthly government newspaper. But the Ministry of Culture persevered with important legislative changes. First to be adopted (in February 2022) was a law on publishers and publications, replacing the Press Code and including online media. This means that journalists working for digital pure-players will have the same right to protect sources as their print and broadcast counterparts. The new law requires all media to register as public sector partners, to declare their real financial owners, and publish a list of investors and donors contributing more than €1,200 annually. These measures are partly intended to force 'disinformation media' to reveal their sources of finance and represent an important step towards greater transparency.

Parliament is also discussing a new platform-neutral law on media services. This will replace the current broadcasting law, improve ownership transparency, and bring Slovak legislation in line with EU norms. It will regulate video-sharing sites like YouTube, a step intended to help tackle hate speech dissemination and improve child safety online, although any country's ability to solve these problems unilaterally is limited.

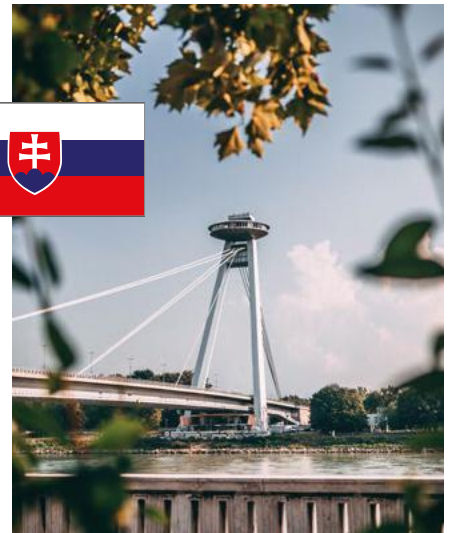
A proposed new law on RTVS (Slovakia's public service broadcaster), intended to improve public oversight, has been eviscerated in Parliament. In particular, MPs failed to approve changes to the appointment procedure for the Director General, so the new DG will again be

elected by Parliament this summer. The Culture Minister had proposed transferring responsibility to the board of governors to depoliticise the choice.

RTVS managers and editors alike complain about underfunding. The licence fee has been frozen since 2004 and is half what Czechs pay while Slovakia's neighbour has twice the population. RTVS reacted to the war in Ukraine by launching a temporary 24-hour news service on 28 February, with indications it may advance plans to start a permanent rolling news channel during 2023. The PSB had been criticised for its tardiness in adapting its programme schedule on Day 1 of the invasion and for previously giving airtime to defenders of a Russian worldview in pursuit of 'balance', criticism that provoked the departure of its head of news.

There were signs of greater regional market integration in the commercial TV sector. Markíza launched a joint streaming service with Czech TV Nova. Both belong to Czech-owned Central European Media Enterprises. The platform, called Voyo, had 300,000 subscribers by January 2022.⁷⁴ In the same month, local multimillionaire Ivan Kmotrík sold rolling news channel TA3 to the owner of the Czech news website *Parlamentní listy* (Parliament papers).

In 2021 financial group Penta sold its stake in *Petit Press*, publisher of the daily newspaper and leading online site *SME*. Penta's entry had provoked a staff walk-out in 2014, when the former editor-in-chief and around 30 journalists left to found *Denník N*. *SME* marked Penta's departure with a front/home-page displaying the hashtag #neustupiliSME (WE stood our ground).⁷⁵ Penta, whose co-owner Jaroslav Haščák was arrested in December 2020 on suspicion of political corruption before the charges were



Population	5.5m
Internet penetration	85%

dropped last year, remains a dominant force in Slovak publishing through its subsidiary News and Media Holding, which owns *Trend*, *Plus 7 dní*, and *Plus 1 Deň*.

Soon after the outbreak of war in Ukraine, Slovakia amended its cybersecurity law, empowering the National Security Office to block websites publishing harmful content, and it immediately blocked three news websites including *Hlavné správy*, a conservative news site with a pro-Russian stance and often criticised for spreading fake news. Concerns about disinformation and the susceptibility of Slovak public opinion to pro-Russian propaganda are longstanding but human rights and journalistic organisations criticised the vagueness of the definition of harm and the risks to free speech. Similar concerns were expressed by RSF (Reporters Without Borders) about December's proposed amendment to the criminal code which would punish the dissemination of fake news with long jail terms.⁷⁶

Andrea Chlebcová Hečková

Constantine the Philosopher University, Nitra

Simon Smith *Charles University, Prague*

⁷⁴ <https://forbes.cz/hleda-se-ceska-hra-na-olihen-se-sefem-cme-o-nove-kellnerovi-i-vyjimecne-sanci/>

⁷⁵ <https://novinky.sme.sk/c/22643923/sme-meni-akcionarsku-strukturu.html>

⁷⁶ <https://rsf.org/en/news/slovakia-must-be-more-ambitious-its-support-media-independence-rsf-says>

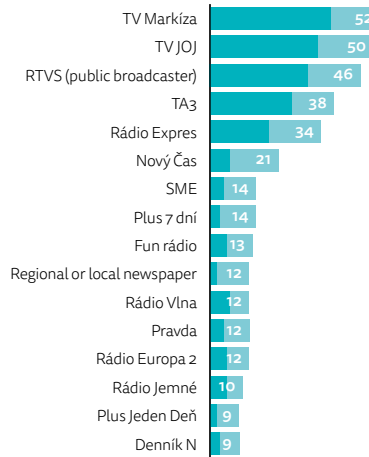
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

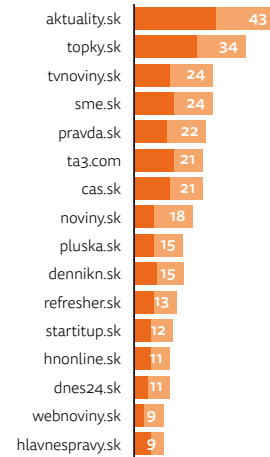
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

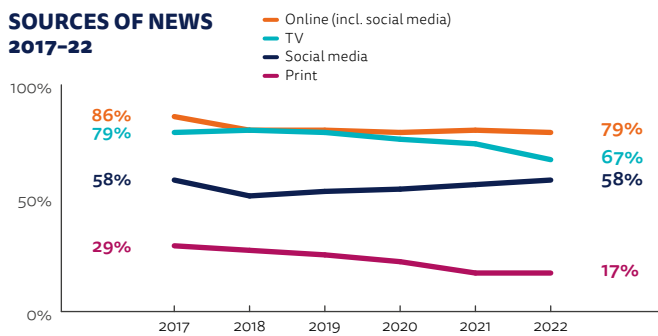


CHANGING MEDIA

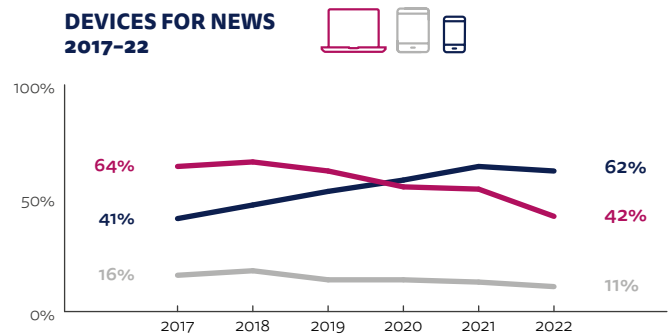
Most Slovak news providers had fewer regular users than a year ago, with TV news down seven percentage points. Social media were the only channel to increase in usage, with Facebook and YouTube still dominant, especially for news, but Instagram rivals their reach among 18–24-year-olds.



SOURCES OF NEWS 2017–22



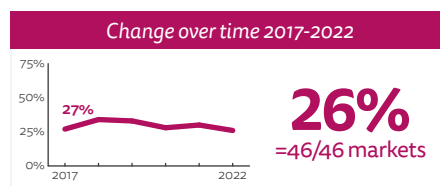
DEVICES FOR NEWS 2017–22



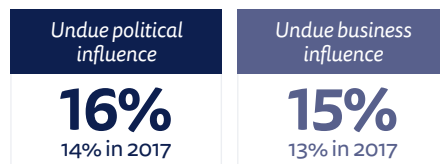
TRUST

Overall trust fell to 26%, placing Slovakia equal lowest of our 46 countries. Low trust reflects decades of interference by powerful business leaders and politicians, seen in the low proportion judging Slovak media as free from political (16%) or business (15%) influence. Brand trust scores also fell significantly, with the exception of local and regional newspapers, whose trust held steady.

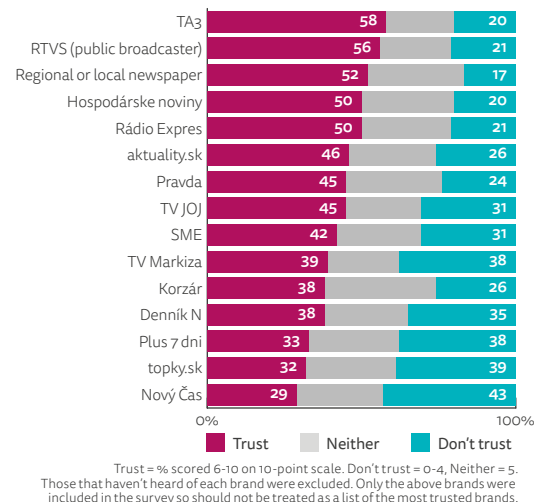
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



35%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	54% (-1)	74%	4	Instagram	15% (+1)	35%
2	YouTube	27% (+1)	67%	5	WhatsApp	9% (-)	34%
3	Facebook Messenger	17% (-2)	53%	6	TikTok	4% (+2)	14%

SPAIN

Spain has a dynamic news market where well-established print and broadcast brands, both nationally and at the regional level, vie for attention with highly competitive digital-born organisations. Public broadcaster RTVE struggles to remain relevant in the face of vigorous competition from the leading commercial groups Atresmedia and Mediaset.

RTVE, the national public broadcaster, had a mixed record in 2021, with impressive innovation in the face of falling audiences. The group successfully launched an improved streaming service, RTVE Play, the RTVE Noticias YouTube channel reached 1 million subscribers within two years, and Playz, its platform for younger audiences, won an Ondas award for quality entertainment. Nevertheless, our data showed RTVE's weekly news audiences declined by three percentage points (pp) both offline and online. Audiences remained quite low for RTVE's TV news bulletins, *Telediarios*, despite their respected international news coverage. RTVE's response includes La Gran Consulta, a series of online surveys alongside a nationwide broadcast roadshow, to gather views from 120,000 respondents about their expectations of RTVE in the new environment.

Spanish publishers are looking for a new relationship with tech platforms after the country changed its online copyright laws in line with new EU rules. An insistence in 2014 on the idea that a fee should be paid to the whole media industry in the shape of a 'link tax', led to Google closing down its news service, but the new law allows deals to be negotiated with individual publishers as seen elsewhere. These are expected to lead to better promotion within Google's popular apps and websites, such as News Showcase, with payments to publishers.

Publishers have made good progress in boosting online revenues, after the widespread adoption of digital subscription models in 2019 and 2020. According to self-declared industry data, Spanish media currently have more than 750,000 digital subscribers,⁷⁷ up 90% since 2020. Among the leading legacy print titles are *El País*

(180,000, of which 143,000 are digital only), *El Mundo* (90,000), *La Vanguardia* (67,000), *Ara* (41,200), *Expansión* (40,000), *ABC* (27,000, and the whole Vocento group, 103,000), *La Voz de Galicia* (20,000), and *El Correo* (18,000). Among the pure-players, titles such as *elDiario.es* (62,000), *El Confidencial* (35,000), *El Español* (25,000), *Vilaweb* (14,000), and *Infolibre* (13,000) have the highest subscriber numbers. Despite this growth, print revenues are still 20 times digital subscription income for traditional newspapers, according to PWC.⁷⁸

Online measurement in general has had a shake-up with a new provider (GfK) taking over in January 2022, with a 15,000-strong panel and fortnightly data focused on consumption per user (rather than per device), thereby giving more importance to reader time and loyalty in an attempt to penalise clickbait. Early results confirmed *El País* in top position, in line with our own Digital News Report survey (18%), which also shows digital-born brands led by the right-wing *OKdiario* (with a staff of 90 and turnover of nearly €10m in 2021), *El Confidencial*, and *elDiario.es*, drawing very significant audiences, 13%, 12%, and 12%, respectively. Readers may be attracted by their critical coverage of national politics and business, including stories on underreported subjects such as wrongdoings by major corporations or even the former King of Spain.⁷⁹

Meanwhile, the Atresmedia broadcasting group (Antena 3 and laSexta) retained its leading position among offline brands while Mediaset's (Telecinco and Cuatro) traditionally successful formula, based on gossip and reality TV, began to look tired and lose audience.

In 2021 there were some launches or relaunches targeting a national audience.



Population	46m
Internet penetration	93%

Major regional and local publisher Prensa Ibérica put together its first nationwide weekday daily title *El Periódico de España* to showcase the group's coverage. The former editor-in-chief of the conservative leaning *ABC* now leads *El Debate*, a new Catholic news site with a staff of 70, and digital-born *The Objective* has expanded to become a daily news site with a newsroom of 50.

Podcast use (41%) is one of the highest in our survey, with YouTube (30%) and Spotify (26%) growing among podcast users while Spanish providers *iVoox* (19%) and *Podium Podcast* (4%) remain stable. *Prisa Media* group is investing in audio and video with a new audio division bringing together activities such as its stations in Spain and Latin America, including *Cadena SER*, its platform and production company *Podium Podcast*, as well as podcasts from its newspapers *El País* and *As*. The group also hired a former RTVE executive to lead their new video division, and appointed *Pepa Bueno* (also formerly of RTVE and *Cadena SER*) as editor-in-chief of *El País*.

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University of Navarra

⁷⁷ <https://dircomfidencial.com/medios/los-medios-digitales-ante-el-reto-de-seguir-sumando-suscriptores-tras-el-boom-de-la-pandemia-20220401-0405/>

⁷⁸ <https://www.pwc.es/es/publicaciones/entretenimiento-y-medios/assets/gemo-espana-2021-2025.pdf>

⁷⁹ <https://dircomfidencial.com/medios/gfk-dam-consolida-el-liderazgo-destacado-de-el-pais-y-el-mundo-en-la-prensa-digital-espanola-20220315-1613/>

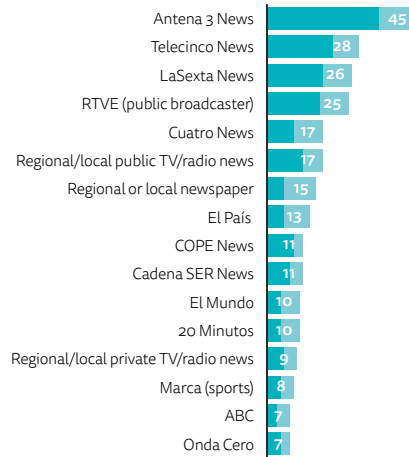
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
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TV, RADIO AND PRINT



ONLINE

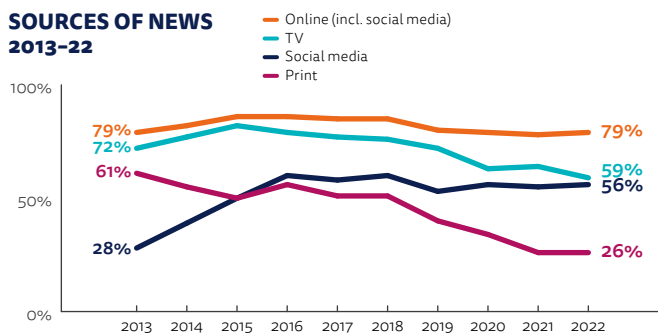


CHANGING MEDIA

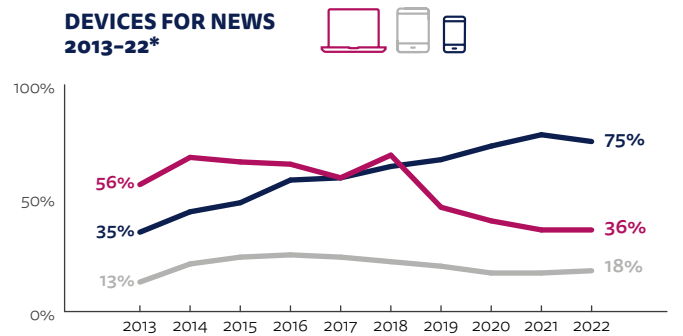
TV news consumption continues to fall, especially among younger viewers, and print's reach has halved since 2013. Spain has one of the highest levels of smartphone news use (75%) in our survey, twice the proportion that access via computer.



SOURCES OF NEWS 2013-22



DEVICES FOR NEWS 2013-22*

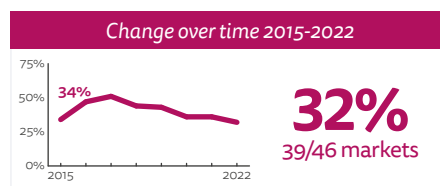


* 2018 figures for computer use were likely overstated due to an error in polling

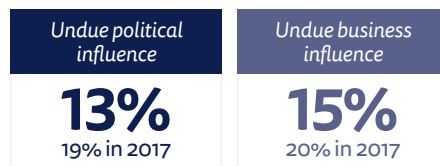
TRUST

Trust in media has been declining since 2017, and for the first time there are more sceptics (39%, +3pp) than people who trust the news (32%, -4pp). This affects all media brands, and none is trusted by more than 50%. Explanations include COVID fatigue and political and media polarisation, intensified by three nationally significant snap regional elections.

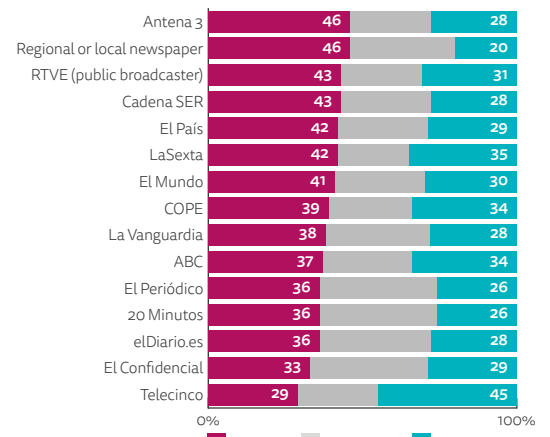
OVERALL TRUST SCORE



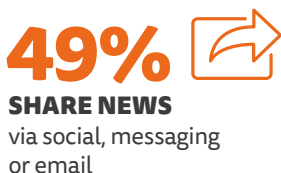
MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News (%)	For All (%)	Rank	Brand	For News (%)	For All (%)
1	Facebook	35% (-4)	64%	4	YouTube	18% (-3)	67%
2	WhatsApp	32% (-3)	84%	5	Instagram	17% (-)	56%
3	Twitter	19% (-)	32%	6	Telegram	7% (-1)	28%

SWEDEN

Sweden is characterised by a mix of public service media (PSM) alongside few national and many local commercial news media. Commercial news publishers nowadays mostly rely on reader revenues, with Sweden our second-highest country for paying for news online.

The PSM and commercial news publishers operate in a country with near universal broadband access. Swedes use digital services throughout daily life, from public transport to communication with companies and authorities, along with streaming services for music, books, and video. Social media platforms as well as alternative news media have gained a strong foothold.

Swedish Television (SVT) and Swedish Radio (SR) operate across broadcast and online and seek to retain legitimacy through the diversity of their content and maintaining reach. As part of that strategy, they have built up their presence on platforms such as Facebook, Spotify, Twitter, and Instagram to attract hard-to-reach audiences, and particularly the young who use public media sites less. SVT has developed mobile-friendly video content, and the proportion of 20–29-year-olds for whom SVT is their number one destination has increased from 9% in 2017 to 26% today.⁸⁰

Commercial media continue their struggle to attract younger audiences, and some are using video content as one way to do this. Bonnier News, for instance, has invested in video for *Expressen*, *Dagens Industri*, and local news. They have also used video to build up their social media presence. However, in recent years Swedish news media companies have generally become more cautious about distributing their content on social media platforms. They are worried that digital intermediaries benefit from the data generated and reap much of the value from publishers and they want to reduce their dependence on platforms.

Swedish commercial news media have reported relatively good financial results for 2021, providing signs of a successful shift to a reader-revenue dominated business

model. Swedes have a long tradition of subscribing to quality newspapers in print, both local and national. This may help explain why Swedes score very high (33%) in comparison to other countries when it comes to Digital News Report survey results for paying for online news. The four national newspapers, *Aftonbladet*, *Expressen*, *Dagens Nyheter*, and *Svenska Dagbladet*, have been particularly successful with online subscriptions, but many local news publishers have also attracted growing numbers of online subscribers. *Aftonbladet* and *DN* stand out as the biggest in the *Digital News Report* data. Notwithstanding this, these figures are influenced by special offers for trial subscriptions, and short-term subscribers have proven to be less engaged with the news than regular long-term subscribers (Wadbring and Bergström 2021).

As COVID hit news publishers hard in 2020, Swedish authorities provided one-off COVID subsidies worth €14.2m.⁸¹ The pandemic continued through 2021, with the greatest restrictions at the beginning and end of the year, but in 2021 these COVID subsidies made up a smaller proportion of total news media subsidies amounting to €92.8m. Swedish advertising also recovered fast in 2021, with expenditure increasing by €730m in 2020 to €4.64bn, exceeding the pre-pandemic all-time high seen in 2019.

The major Swedish news publishers reported positive financial figures for 2021 thanks to a mix of increased advertising, subscription growth, and the usual subsidies boosted by additional COVID support. For example, local news conglomerate Stampen reported online advertising and reader payments up by a third. Schibsted reported increasing digital advertising and subscription revenues, for *Aftonbladet* in particular. Bonnier News made €20.8m profit in 2021, which, after



Population	10.1m
Internet penetration	96%

setting aside the extra subsidy support granted in 2020, amounted to a €10.6m increase in profits. In 2021 there was also an overall 5% decline in newspaper print subscriptions which, even after a 13% increase in digital reader revenues, left a 2% decline in consumer revenue. The fact that success with online subscriptions so far has not replaced the loss in print subscriptions is critical, since after reducing their dependence on advertising revenues, news publishers now rely on reader revenues for most of their profits (Olsen et al. 2021).

Faced with these challenges, publishers are investing in digital and new mergers and strategic partnerships, in an already concentrated market dominated by a few big conglomerates. For example, Bonnier's local news division (40 titles) made two further acquisitions in 2021 and Bonnier News (40 newspapers) and Gota Media (14 newspapers) concluded a strategic partnership, which was approved in early 2022. But some publishers who seem to be performing relatively well depend on subsidy support. For instance, Bonnier News Local received €25m in support in 2021 and their commentary on their 2021 financial results states that many of their newspaper titles would not have survived without subsidies.

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Oslo Metropolitan University and University of Gothenburg

⁸⁰ <https://www.ebu.ch/publications/strategic/loginonly/report/news-report---whats-next-public-service-journalism-in-the-age-of-distraction-opinion-and-information-abundance>

⁸¹ Currency conversion at 10 SEK = €1.

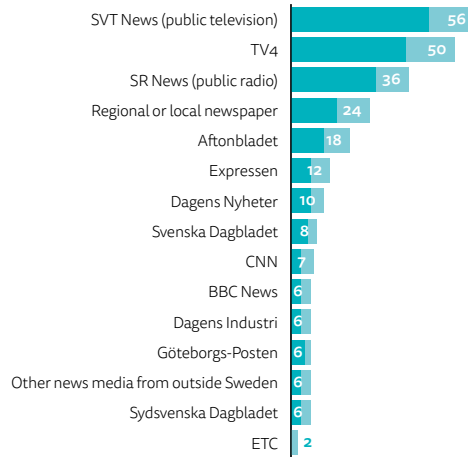
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

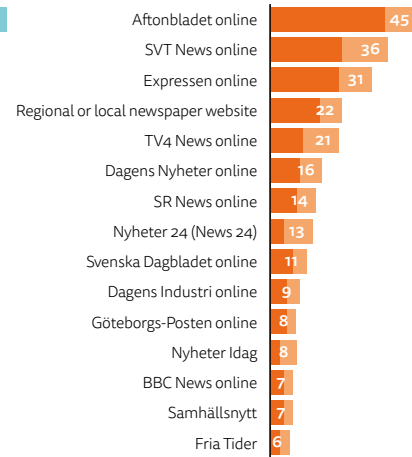
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

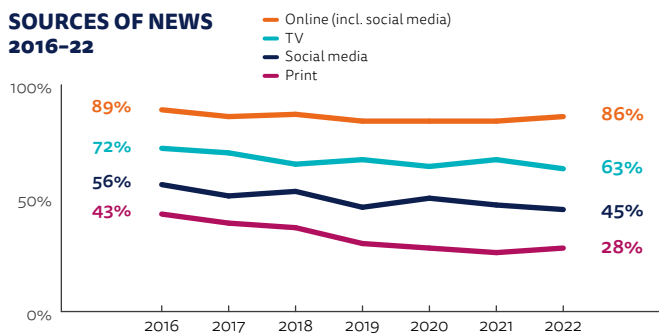


CHANGING MEDIA

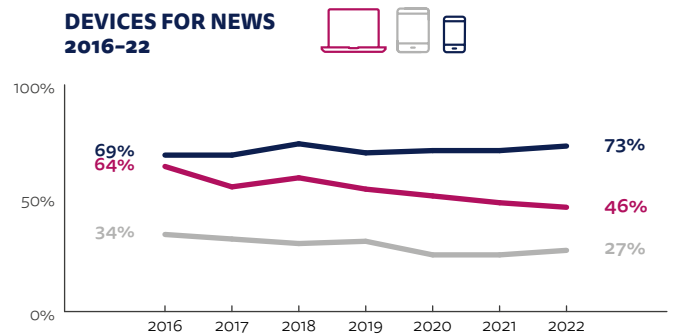
Swedes first and foremost gravitate to online news, then television and print. For online news they maintain their overall high use of smartphones for news, followed by computers or tablets. Since 2019, smartphones have gradually increased in popularity.



SOURCES OF NEWS 2016-22



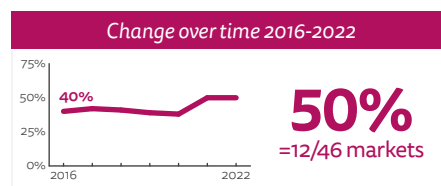
DEVICES FOR NEWS 2016-22



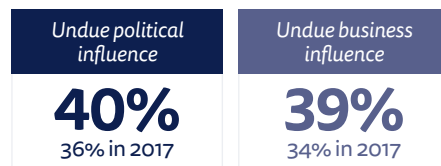
TRUST

As in the previous year, 50% of Swedes say they trust the news overall, and 56% trust the news they use. PSM and regional/local newspapers get highest trust scores, whereas alternative news media sites receive the least overall trust.

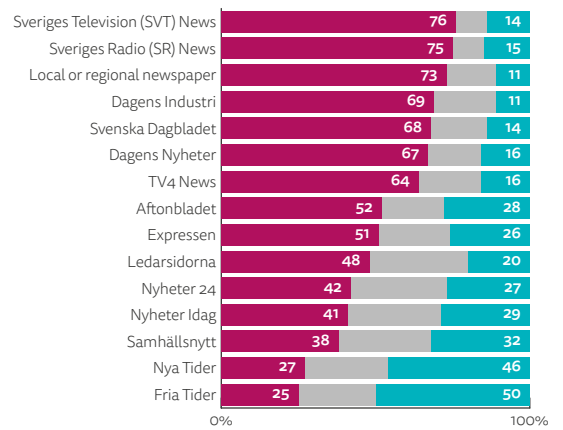
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	29% (-)	72%
2	YouTube	16% (+2)	66%
3	Instagram	12% (+3)	55%
4	Facebook Messenger	11% (+1)	54%
5	Twitter	7% (-)	17%
6	WhatsApp	5% (+1)	26%

SWITZERLAND

In Switzerland's linguistically distinct and relatively small markets, the business of news remains challenging – and seems likely to remain so, after the defeat in a February 2022 referendum of proposals to increase state subsidies for private media.

With this latest referendum, the state of the Swiss news media was once again centre stage, although media attention and turnout were not nearly as high as in 2018 when a referendum on abolition of public broadcast licence fees was defeated.⁸² The February referendum saw the new media law rejected by 55% of voters after an often-heated debate, with opposition led by media owners linked to right-wing parties. The law included plans to more than double indirect subsidies for print (from 50m Swiss Francs per annum to 120m), some increase in subsidies for small regional private broadcasters (81m to 109m per annum), and 30m Swiss Francs per annum in new direct subsidies focused mainly on smaller online media firms. The debate reflected divisions in public opinion and the limited understanding of the economic situation of the news media – as highlighted in last year's survey data.⁸³ This might partially be because of the different position of news operations compared to media companies in general. On the one hand, declining advertising revenues are driving increased media concentration and centralisation of news production. On the other hand, the best-known media companies remain profitable, in many cases thanks to revenues from non-journalistic activities such as online marketplaces and cost-cutting measures in journalism (e.g. TX Group, formerly Tamedia, merging its two papers in Switzerland's capital Bern).

Publishers are now pressing for policies to make platforms pay copyright fees for link previews and snippets, a proposal which the government seems receptive to. This is a touchy subject in a country where the platforms have a significant physical presence, with Facebook developing virtual reality products in Zurich and Google expanding its Zurich base (its largest development centre outside the US) to work on Google Maps, YouTube, and other services.

Possibly encouraged by the outcome of the media law referendum, a committee of right-wing politicians and business associations has started working towards another referendum targeting Switzerland's public broadcaster SRG SSR. This proposal, seeking a halving in the licence fee, is expected to have a better chance of succeeding than the 2018 plan for its abolition. SRG SSR is criticised for losing important sports rights and dropping some well-known radio and TV cultural programmes as part of its 'digitalisation strategy 2024'. Meanwhile its news programmes remain the most trusted sources with the highest reach offline and considerable reach online.

Amidst the difficult digital transformation, some major private media companies are pursuing greater cooperation. The largest two, Ringier, the publisher of the tabloid *Blick*, and TX Group with brands such as *20 Minuten*, formed a joint venture in 2021, merging their online marketplaces. They are also leading the joint industry project 'OneLog', to provide users with a single login for online news content – both free and paid – from multiple providers, while companies hope to get better data for advertising. The gradual introduction of the login system might explain why 31% of Swiss respondents (amongst the highest figure in the *Digital News Report* countries) say that they have registered with news outlets.

Swiss publishers are also betting on subscription strategies, with many of them offering freemium models online. The percentage paying for news (18%), which is up by seven percentage points (pp) since 2019, already places Switzerland alongside the higher ranking countries in our sample. The prestigious German-language paper *NZZ*, now has roughly 200,000 subscribers, with an increasing number paying for annual instead of short-term subscriptions.



Population	8.6m
Internet penetration	94%

New digital-born outlets generally offer cost-free tabloid journalism to attract advertisers (e.g. *Blick* in German- and *Watson* in French-speaking Switzerland) or operate in 'niches' in the larger cities (e.g. *Bajour* in Basel). One exception is *Republik*, which started with crowdfunding in 2018 and now has c.29,000 subscribers with a budget of around 6m Swiss Francs per annum; it focuses on slow news and offers a few articles a day. While these launches demonstrate a readiness to innovate, they also indicate the continuing struggle to produce sustainable comprehensive quality journalism online.

Format-wise, Swiss media's move towards more audio (podcasts) and audiovisual formats remains limited. However, *20 Minuten*, Switzerland's dominant cost-free print and online brand, is shifting towards a 'social media first' strategy with new formats. On its news app, it is also experimenting with automated translations in languages used by migrant minorities (e.g. Portuguese, Albanian, English).

Linards Udriš and Mark Eisenegger
 Research Center for the Public Sphere & Society (fög), Department of Communication and Media Research (IKMZ) / University of Zurich

⁸² https://www.foeg.uzh.ch/dam/jcr:05f25cf1-569f-4df8-ba02-141ce4d47d5c/Abstimmungsmonitor_Februar_2022.pdf

⁸³ <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2021/how-do-people-think-about-financing-commercial-news-media>

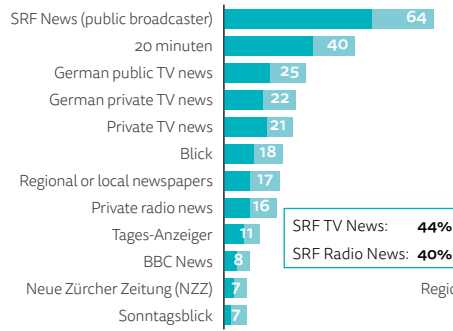
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

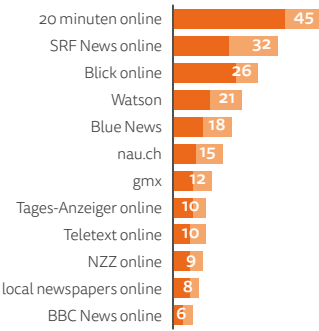
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT (GERMAN)



ONLINE (GERMAN)



18%



pay for **ONLINE NEWS**

German 16% | French 22%

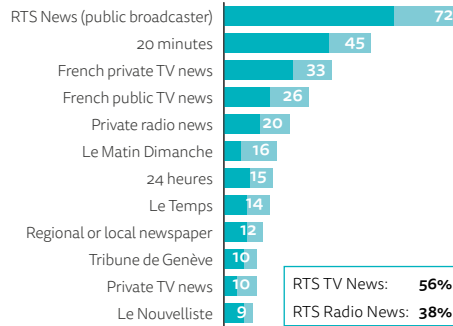
35%



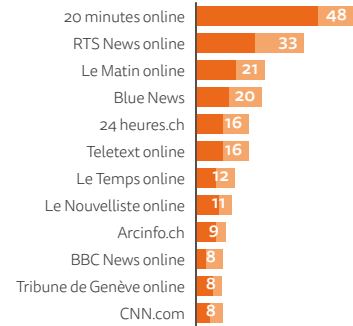
listen to **PODCASTS** in the last month

German 37% | French 34%

TV, RADIO AND PRINT (FRENCH)

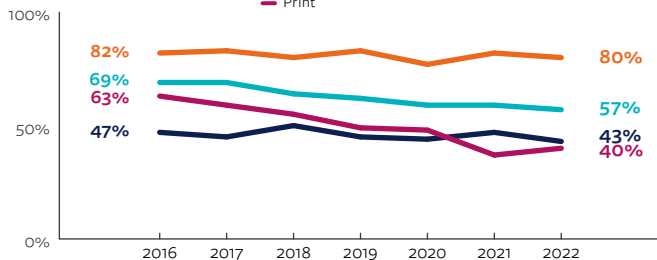


ONLINE (FRENCH)

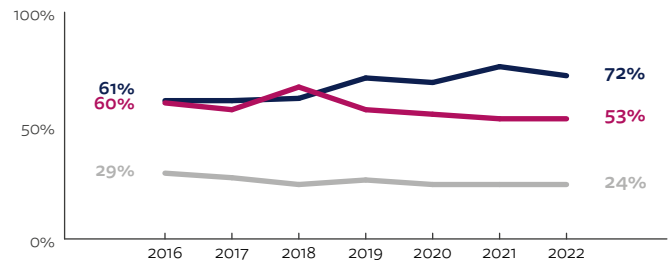


SOURCES OF NEWS 2016-22

- Online (incl. social media)
- TV
- Social media
- Print



DEVICES FOR NEWS 2016-22*

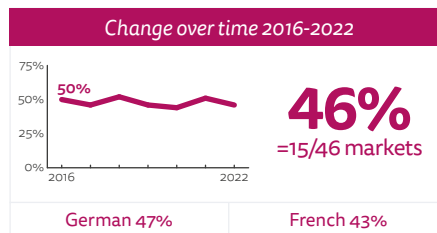


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Overall, news trust is down after last year's COVID bump. In terms of brands, public broadcasters are the most trusted in both German- and French-speaking areas, followed by local newspapers and quality newspapers. Tabloids and digital-born brands tend to be less well-trusted.

OVERALL TRUST SCORE

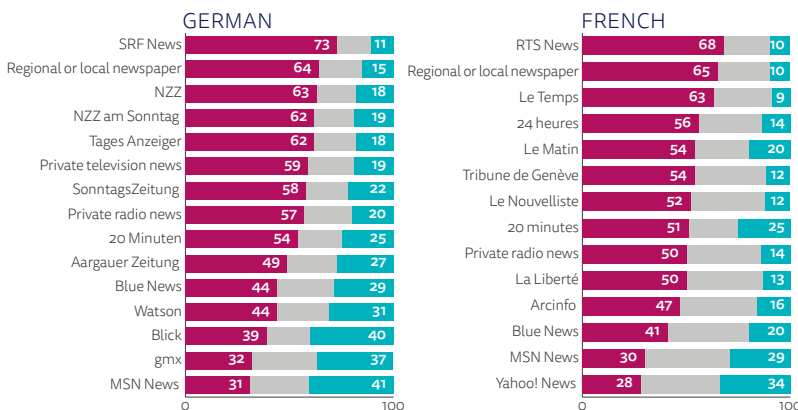


MEDIA IS FREE FROM ...

	Undue political influence	Undue business influence
	37% 38% in 2017	34% 35% in 2017
German	38%	35%
French	38%	35%

BRAND TRUST SCORES

- Trust
- Neither
- Don't trust



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	WhatsApp	30% (-)	76%
2	Facebook	27% (-)	54%
3	YouTube	24% (-)	63%
4	Instagram	15% (+2)	42%
5	Facebook Messenger	8% (-)	27%
6	LinkedIn	7% (+1)	21%

Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

TURKEY

With devaluation fuelling a 20-year high in inflation, Turkish media are facing significant business pressures. Independent journalists who already work under difficult political conditions are also increasingly worried for their financial security.

The Turkish lira has fallen almost 50% against the US dollar over the past year, and these challenging economic conditions have hit newspapers already reeling from a 14% decline in print consumption since 2020. Faced with falling revenues and increased paper and other costs, many newspapers are struggling to survive.

In a move to ease public concerns about inflation, President Erdoğan abolished the 2% tax on electricity bills previously used to fund TRT, the state broadcaster. Anti-government and alternative media are more vulnerable to the economic crisis than pro-government ones. This is because government organisations advertise almost exclusively in pro-government outlets and also because outlets that are critical of the AKP government, such as Fox TV News, Tele 1, and Halk TV, are repeatedly fined by RTÜK, the broadcasting regulator. According to a recent report, these fines amounted to nearly \$2m in 2021, leaving independent media outlets in an even more difficult position.⁸⁴

Political censorship places additional pressures on independent media. Online news outlets continue to be occasionally blocked or asked to remove content deemed inappropriate or offensive. For example, stories about abuses of government contracts are either blocked or removed by rapid court decisions.⁸⁵ While independent outlets regularly cover the impact of inflation, pro-government outlets focus on more positive news, such as the increase in pensions. Further, prominent independent journalists are constantly detained or face lawsuits for reporting on issues not approved by the government.⁸⁶ For instance, the Banking Regulation and Supervision Agency of Turkey, along with other organisations, lodged criminal complaints

against 26 individuals, including several journalists, who had criticised the state of the Turkish economy on social media. Even more concerning is the increasing physical violence against journalists. Several journalists were physically attacked because of their reporting. In February, the owner of a local newspaper which reported on local corruption was murdered in his office.

International news outlets have also come under increasing political pressure. BBC News online is the only one that registers on our top brands list with 16% weekly use this year compared to 20% last. The regulator RTÜK required the Turkish services of Euronews, Deutsche Welle, and Voice of America to obtain broadcasting licences for their websites. Euronews removed video content from its website to avoid the need for a licence whilst DW and VoA's appeals are due to be decided in court. Given all these attempts to affect citizens' rights to access news in Turkey, it is unsurprising that only 23% of respondents think that media are independent of political influence.

News consumption via social media continues to grow and is important for independent media. Instagram and YouTube are proving to be particularly useful for visual content and generating traffic for social and economic issues, such as women's rights, which are largely ignored by the pro-government media. Mainstream opposition outlets such as *Sözcü*, and the Turkish-language services of international providers such as BBC *Türkçe*, have large followings on Instagram, and share stories and posts with links to their YouTube channels or websites.

However, false and misleading information online remains a widespread concern (62%) and our respondents report mainly having seen false information on politics (53%) and



Population	83m
Internet penetration	83%

Coronavirus (46%). Social media platforms continue to work with fact-checkers in Turkey. TikTok, which is increasingly popular in Turkey (21% report using TikTok for general purposes), started collaborating with Teyit, a Turkish fact-checking organisation which also works with other platforms, such as Facebook and WhatsApp. Some outlets, such as *Hürriyet*, have also ventured into TikTok but the popularity of news content on this platform remains to be seen.

Amongst the major brands, Fox TV News continues to be both the most popular and trusted news source in Turkey. *Sözcü*, an anti-government newspaper, and CNN Türk, the Turkish-language franchise of CNN, are also popular. Online news consumption follows a similar pattern to offline consumption, with prominent mainstream and opposition brands leading the way.

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⁸⁴ <https://m.bianet.org/bianet/medya/255485-rtuk-2021-de-cezalari-hep-ayni-kanallara-kesti>

⁸⁵ <https://www.birgun.net/haber/medyaya-sansur-talimati-erdogan-in-sozleri-buyuk-zamdan-sonra-buhar-oldu-382445>

⁸⁶ <https://www.mlsaturkey.com/tr/t3-vakfinin-cigdem-tokere-actigi-tazminat-davasinda-tarik-balyali-tanik-olarak-dinlendi/>

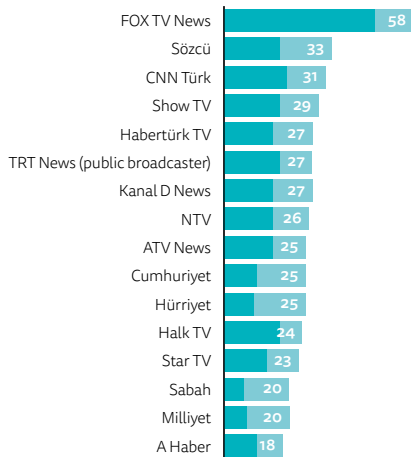
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

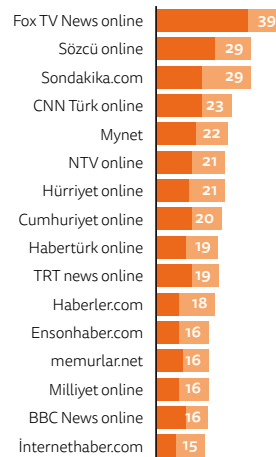
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



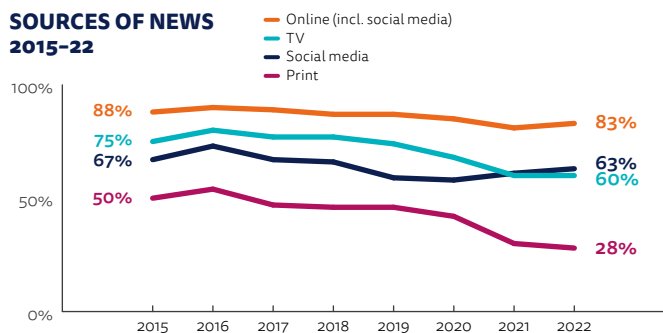
ONLINE



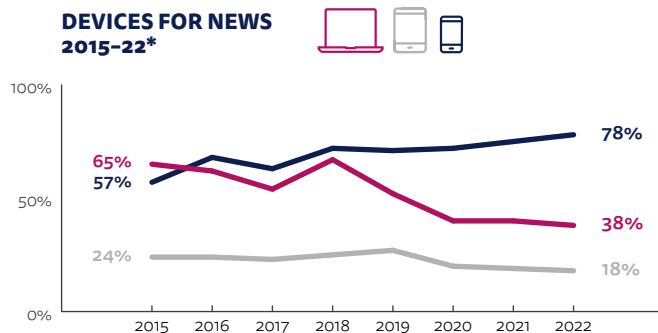
CHANGING MEDIA

Social media have replaced TV as the most widely used source of news for the first time, indicating the decline of traditional media sources with our urban-based sample. The further rise of YouTube (43%) and Instagram (40%) for news presents both an opportunity and challenge for the independent news media in Turkey.

SOURCES OF NEWS 2015-22



DEVICES FOR NEWS 2015-22*

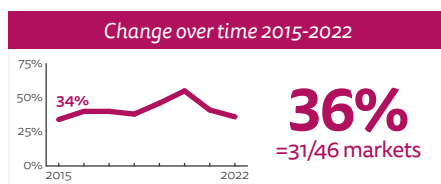


* 2018 figures for computer use were likely overstated due to an error in polling

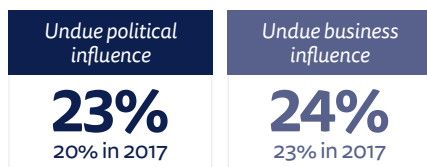
TRUST

Overall news trust is down by five percentage points in the last year at 36%. Fox TV News and brands such as Sözcü and Cumhuriyet, which are among the few remaining outlets that are not pro-government, are most trusted by our respondents. Most brands have lost trust since last year.

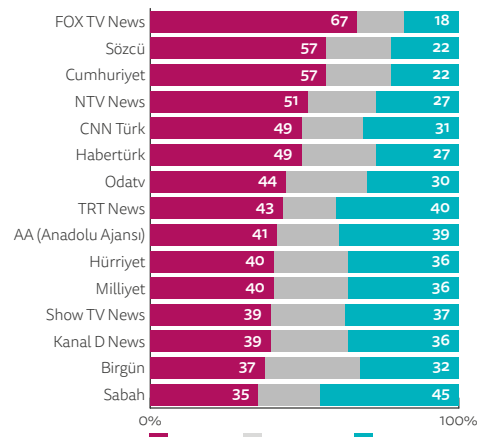
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

50%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	YouTube	43% (+3)	73%	4	Facebook	32% (+2)	55%
2	Instagram	40% (+6)	69%	5	WhatsApp	31% (+1)	72%
3	Twitter	35% (+1)	48%	6	Telegram	10% (-3)	26%

3



SECTION 3

Analysis by Country and Market

Americas

AMERICAS

3.25	United States	112
3.26	Argentina	114
3.27	Brazil	116
3.28	Canada	118
3.29	Chile	120
3.30	Colombia	122
3.31	Mexico	124
3.32	Peru	126

USA

A new presidential administration in its first full year, and continuing disruption caused by the ongoing pandemic, presented challenges and opportunities for US news organisations. Remote work has become standard, health reporting is increasingly recognised as a vital public service, and many outlets have launched new products – from newsletters to podcasts to video to virtual events – to keep audiences informed.

Fielded before the Russian invasion of Ukraine, our US survey showed a drop in overall levels of news usage, with about two-thirds of respondents saying they access news in any form at least once a day – down four percentage points (pp) from 2021. The share who report being ‘extremely’ or ‘very’ interested in news also fell for the second consecutive year, to under half of respondents, while nearly one-fifth now say they are not interested in news. Early signs suggest that attention to news rose initially with Russia’s war in Ukraine – in particular, 24-hour cable news outlets saw viewership surge in March – but longer term trends continue to point to exhaustion from a demanding news cycle.

Trust in the news media also continued to decline. The share of Americans who trust news generally fell 3pp, to 26%, while only 41% now say they trust the news they themselves use. These trends coincide with shrinking confidence even in highly regarded institutions, such as science, medicine, and the military. A Pew Research poll fielded in late 2021 found that only 29% of US adults reported ‘a great deal of confidence in medical scientists to act in the best interests of the public’. The decline was most pronounced for Republicans, just 15% of whom had high confidence in medical scientists. Highly politicised debates over masking, vaccines, and other public health measures help to explain these low figures.

In this highly charged environment, journalists have struggled to respond to disinformation campaigns related to the COVID-19 vaccine. Coverage of the networks that spread hoaxes and conspiracy theories – sometimes called the ‘misinformation beat’ – is increasingly common in major print and broadcast newsrooms. Public controversies like the furore over Joe

Rogan’s immensely popular Spotify podcast, where a succession of guests aired bogus and dangerous medical claims related to COVID, have also focused attention on the issue. However, Tow Center research suggests this truth-telling has uncertain effects in a highly polarised climate.⁸⁷

The resources newsrooms need to counter these trends are significant, yet it is still a minority who pay for online news (19%). Some large brands continue to see growth, such as the *New York Times*, which had surpassed 8 million digital subscriptions by the end of 2021, mostly to its news products, but helped by non-news products such as cooking content and games (the company also purchased the popular Wordle game in January 2022), as well as the *Boston Globe* and the *Los Angeles Times*. Even local newspaper chains have seen gains in digital subscriptions, and Axios continues to expand its local newsletter model into additional cities.

Closures, furloughs, and layoffs in the news sector have accelerated. Gannett, the country’s largest newspaper chain with more than 230 newspapers in 46 states, announced company-wide layoffs at multiple points during the pandemic. According to the Tow Center’s Journalism Crisis Project,⁸⁸ more than 50 newspapers have closed around the country in the wake of the pandemic, leading to additional calls for public funding strategies, including a proposed payroll tax credit as part of the Biden administration’s Build Back Better Bill.

Unionisation efforts have also gained steam. In 2021, journalists at organisations ranging from TV news stations to newspapers to magazines and digital outlets announced union efforts, including more than 1,500 journalists from 26 workplaces who



Population	331m
Internet penetration	90%

joined the NewsGuild in 2021, the largest journalist-representing union in the US.

Meanwhile, a Tow Center survey of small-market newspapers in 44 states found high interest in new tools like podcasting and video; a remarkable 20% of respondents had already launched podcasts.⁸⁹ Local news organisations are also stepping up efforts to challenge the large platform companies with which they have been competing for digital revenues for years, with more than 200 newspapers around the country filing antitrust lawsuits against Google and Facebook with the aim ‘to recover past damages to newspapers’.⁹⁰ In October, whistleblower Frances Haugen leaked thousands of documents – dubbed The Facebook Papers – showing discrepancies between CEO Mark Zuckerberg’s public comments and the company’s internal policies, such as the handling of misinformation and calls to violence in regard to the 2020 presidential election; a lack of focus on hate speech, misinformation, and disinformation efforts outside the US; and an emphasis on user engagement over user well-being, particularly among young people.

Joy Jenkins

University of Tennessee, Knoxville

Lucas Graves

University of Wisconsin-Madison

⁸⁷ https://www.cjr.org/tow_center_reports/polarization-covid-conservative.php

⁸⁸ https://www.cjr.org/business_of_news/five-findings.php

⁸⁹ https://www.cjr.org/tow_center_reports/life-at-local-newspapers-in-a-turbulent-era-findings-from-a-survey-of-more-than-300-newsroom-employees-in-the-united-states.php

⁹⁰ <https://www.axios.com/1-local-newspapers-lawsuits-facebook-google-3c3dee3a-cce3-49ef-b0a2-7a98c2e15c91.html>

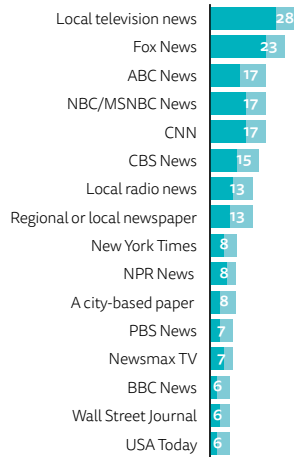
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

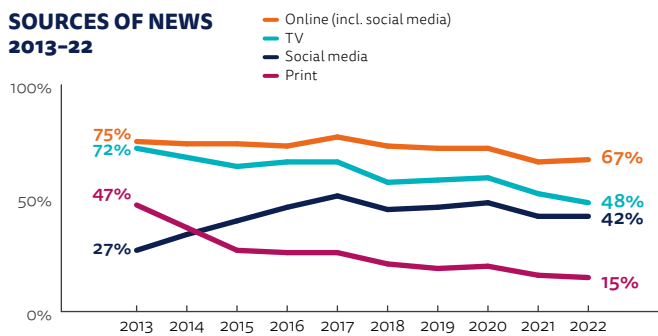


CHANGING MEDIA

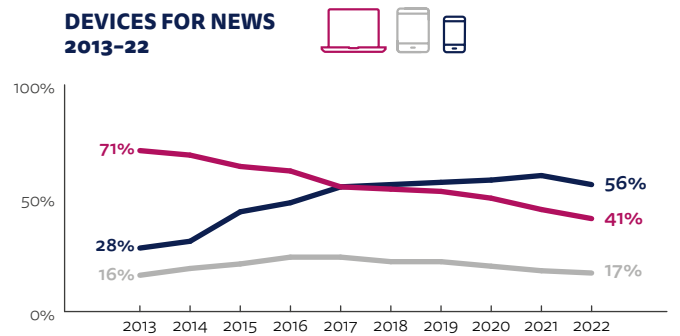
Long-term trends show a decline in traditional forms of news, such as TV and print, with online consumption flat. Local TV remains an important but declining source of news for many Americans. Both the *Washington Post* and the *New York Times* reach more people online than in print.



SOURCES OF NEWS 2013-22



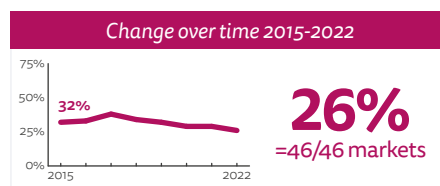
DEVICES FOR NEWS 2013-22



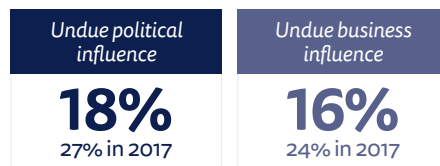
TRUST

Overall trust in the news media (26%) has fallen by 12pp since 2017 and is the lowest in our survey for the second year running. Local television news remains well trusted, but most other brands have a polarised reputation, especially cable news channels such as Fox News and CNN. Digital brands such as Yahoo! and BuzzFeed struggle to build credibility with all audiences in an increasingly competitive marketplace.

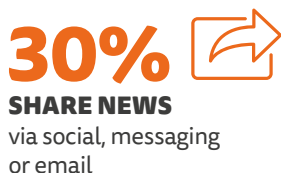
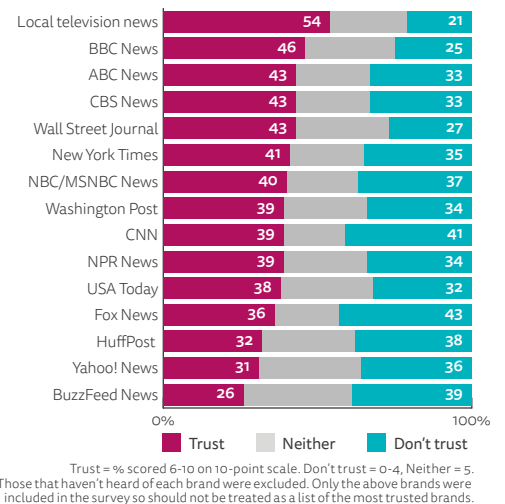
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All		
1	Facebook	28%	(-)	58%	4	Facebook Messenger	8%	(-1)	39%
2	YouTube	19%	(-4)	58%	5	Instagram	7%	(-1)	30%
3	Twitter	11%	(-2)	20%	6	Reddit	4%	(-1)	12%

ARGENTINA

Argentina has a strong and concentrated private media system, comparatively weaker public media organisations, and a high degree of political polarisation in the media which echoes that among the population. As the pandemic receded, circulation of print newspapers has continued to fall, making discussions over sustainability of news media ever more pressing.

As life in Argentina went slowly back to normal after the pandemic, news consumption was flat or declined, and trust in news also has declined slightly after last year's gains. It may be that audiences are getting tired of following day-to-day news about COVID-19.

One of the key effects of the pandemic on the media has been an acceleration in the decline of printed newspapers. Circulation fell by 21% since 2020, forcing more publishers to focus on digital subscriptions, which are among the highest in Latin America, but still earn them much less – a monthly digital subscription is much cheaper than what it would cost to buy a print paper every day.⁹¹

Clarín, the top-selling print newspaper in Argentina, lost 24% in circulation between the third quarter of 2020 and the third quarter of 2021, but increased its digital subscription base by 55%, to 414,400. Its main competitor, *La Nación*, had 348,000 subscriptions by the end of 2021. Other news outlets, including *Perfil* and *La Voz*, maintained their paywalls, while some, such as print-based *Página/12* and online-only *Cenital* and *EldiarioAR*, relied on a membership system to generate revenue.

The two top online news sites in terms of audience according to our figures were *Infobae*, which 40% of survey respondents said they had accessed in the previous week, and the online website and apps of cable news channel *TN* (29%). Neither has a paywall or membership system.

Television ratings were stable but low, with total average ratings of 20% for all free-to-air television stations in the Greater Buenos Aires area, where audiences are measured more consistently. Moreover, although there are six news cable stations, only one (*TN*) had an average of more than 2% of the audience share.⁹²

Newspapers and TV news tend to reflect the country's political polarisation. Ownership of news cable channels and major print newspapers is largely concentrated in the hands of corporations with marked political preferences and relationships. For instance, *TN*, which is part of Grupo *Clarín*, the country's largest multimedia company, has been critical of President Alberto Fernández's administration. Conversely, *C5N*, which was purchased in 2012 by businessman Cristóbal López, who has ties to the Kirchnerists – tactically allied to the current administration – has been supportive of the government and critical of the previous president. *La Televisión Pública*, the public broadcaster, has relatively low audience share, is perceived as pro-government, and struggles to be an effective alternative to privately owned media.

In this apparently bleak scenario, there were innovations beyond traditional media, and some of these seem to be finding an audience. For instance, our data show Twitch use increasingly significant with young (male) audiences, driven by gaming and sports, and use of Instagram for news reached 31% of the population, up from 25% in 2021. Argentina has one of the highest levels of use of social media in the world, a result perhaps of the importance of maintaining social bonds in Argentine culture.

Podcast listening too has increased significantly – from 29% to 34% – in the last year. *Posta*, the leading podcast producer in Argentina, has been making *Esto pasó Posta* (This really happened) since 2020, and *Diario la Nación* operates a daily two-minute podcast with the news 'you have to know'. Traditional news operations such as *La Nación* and *Clarín*, new entrants such as *Eldiario.ar* and *Cenital*, and individual journalists too are publishing newsletters on topics



Population	46m
Internet penetration	91%

including politics, business, gender issues, technology, the environment, and books. They provide another source of revenue, whether from subscriptions or donations.

News partnerships with Google News Showcase – a programme which displays partner publishers' content in a bespoke project and then monetises their content – increased from 31 media companies in 2021 to more than 80 in 2022. Media partners describe the partnership favourably, both because of the economic benefits and also because of the opportunity to connect with wider audiences.

Overall, the media in Argentina appear to be in transition, probably accelerated by the pandemic. Business models, formats, and devices are still being evaluated by audiences, whose scepticism towards news remains high.

Eugenia Mitchelstein and Pablo J. Boczkowski

Center for the Study of Media and Society, Argentina (MESO)

⁹¹ Anuario ADEPA, *Industria Periodística 2021*. <https://adepa.org.ar/wp-content/uploads/2021/12/anuario-adepe-2021.pdf>

⁹² Data from Kantar IBOPE media, Argentina.

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

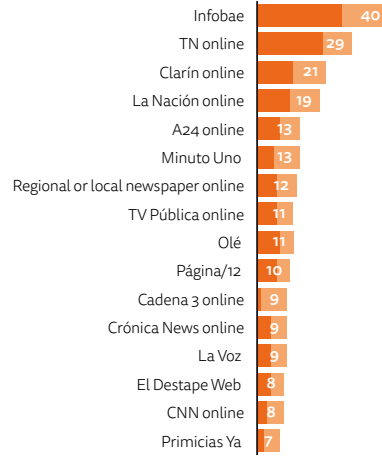
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

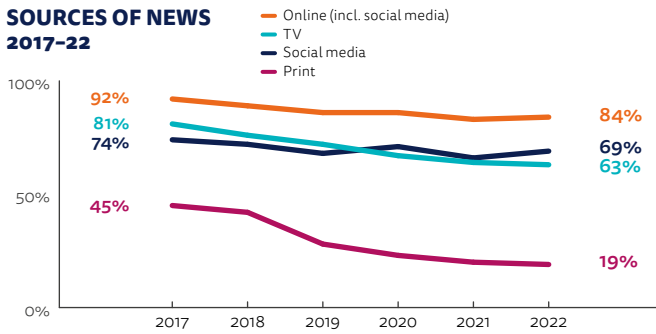


CHANGING MEDIA

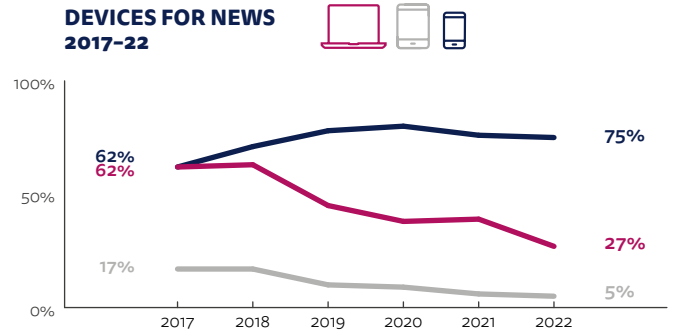
TV and print consumption have both fallen considerably over the last five years with online and social media largely flat. Market leaders in broadcast and online respectively, Telefé and Infobae, have maintained their audiences, each reaching more than a third of our sample.



SOURCES OF NEWS 2017-22



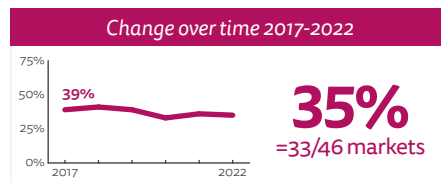
DEVICES FOR NEWS 2017-22



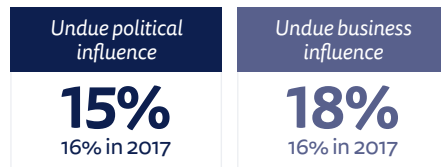
TRUST

Trust has decreased slightly for news in general, and, more significantly, for trust in news the respondent uses themselves (-5pp). Telefé continues to be the most trusted brand but a significant number of brands have high levels of distrust (score 0-4), including C5N and public broadcaster TV Pública. This illustrates the high level of media polarisation in Argentina.

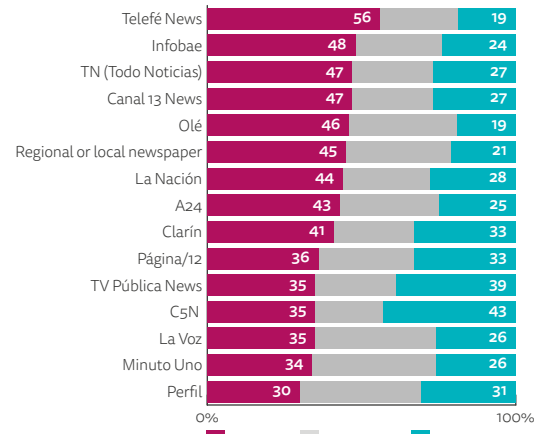
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	56% (-)	77%	4	YouTube	27% (+3)	72%
2	WhatsApp	35% (-1)	81%	5	Twitter	13% (+1)	23%
3	Instagram	31% (+6)	61%	6	Facebook Messenger	7% (-)	29%

BRAZIL

Media ownership remains highly concentrated in what is South America's biggest market. Big conglomerates dominate in broadcast and print, but face greater competition online and via social media. President Jair Bolsonaro, meanwhile, continues to attack the press routinely amid evidence of rising news fatigue.

Selective news avoidance has reached a new high in Brazil, with over half of survey respondents (54%) saying they often or sometimes take a break from the news. This is the third-highest proportion of all the markets surveyed. This strong upwards trend – news avoidance was at 34% in 2019 – seems to reflect a sort of 'bad news fatigue': inflation hit a six-year high in 2021,⁹³ while the pandemic remained a prominent topic in the media.

The COVID-19 death toll in the country more than doubled in 2021 compared to the previous year, reaching 412,880, as reported by CNN Brasil. More than half of Brazilians rated President Bolsonaro's handling of it as 'poor' or worse,⁹⁴ and in September his approval rating reached a record low. Since 2020, the Coronavirus has caused at least 303 deaths among Brazilian media workers and former journalists, the most significant number across all the 95 countries listed by the Press Emblem Campaign (PEC).

Political tension mounted at several moments as the president continued to defy Brazilian political norms and challenge checks and balances. In August 2021, he urged the Senate to impeach a Supreme Court justice, Alexandre de Moraes. A few weeks later the president attacked the court again during speeches in São Paulo and Brasília in front of thousands of supporters who had taken to the streets in protest.

In March, the aforementioned judge ordered a nationwide suspension of Telegram's services, saying that the messaging app had repeatedly refused to comply with judicial orders. He revoked the suspension order a few days later. Moraes had previously ruled that Telegram should remove messages found to contain falsehoods and provide the information requested by Brazilian judicial authorities. With more than

1 million followers on Telegram, President Bolsonaro complained that the ban had 'no legal support'.

The president's troubled relationship with mainstream media shows no signs of improvement. Fact-checking agency Lupa reported that he attacked the press in 42 of the 49 live broadcasts he hosted on social media in 2021.

Almost two-thirds of Brazilians (64%) now get their news from social networks each week using a wide array of networks. Facebook itself has been losing ground, and has been overtaken by YouTube as the most popular social network for news consumption. There has also been a strong rise in the use of newer visual networks such as Instagram (35%) and TikTok (12%) for news, while messaging apps WhatsApp (41%) and Telegram (9%) remain important ways to discuss and share news.

TV remains dominant in terms of media expenditure in Brazil, but it is losing ground to online media. Free-to-air television's share of advertising money decreased from 51.9% to 45.4%, according to the data gathered by Cenp-Meios from 2020 and 2021, respectively. In comparison, the magazines' advertising share fell by one-third. One of the country's top-selling news magazines, *Época*, announced in May that it was ending its print edition after 23 years of publication. Part of the magazine's content was migrated to the pages and website of the newspaper *O Globo*, part of the same media group.

The average daily paid circulation of the ten best-selling newspapers totalled 1.51 million copies last year, a drop of nearly 3.5% since 2020. But digitalisation is advancing fast. In the first two months of 2021, digital subscriptions, which include



Population	214m
Internet penetration	75%

PDF and website access, accounted for 59% of the circulation of Brazil's ten best-selling newspapers; by the end of the year, this figure was 67%.⁹⁵

This year's election is expected to be a further demonstration of the country's political polarisation. And yet figures indicate that Brazilians perceive the media environment as relatively homogeneous in terms of political positioning. Only 23% of respondents perceive the news organisations in their country as politically 'far apart'. While in other countries there's a perception that journalists should stick to reporting the news when using social media, a majority of people in Brazil (60%) think that these professionals should be able to express personal opinions as well as report the news.

Rodrigo Carro

Financial journalist and former Reuters Institute Journalist Fellow

⁹³ <https://www.reuters.com/world/americas/brazil-2021-inflation-highest-since-2015-central-bank-vows-tighter-policy-2022-01-11/>

⁹⁴ Poll Institute Datafolha, July 2021.

⁹⁵ Source: Instituto Verificador de Comunicação (IVC).

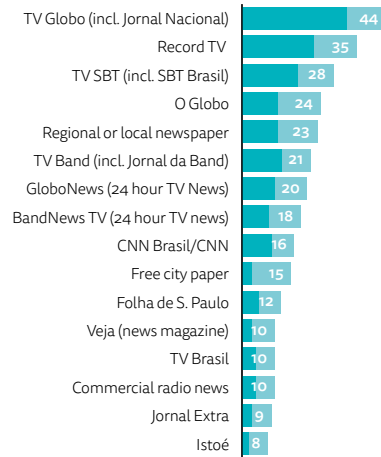
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

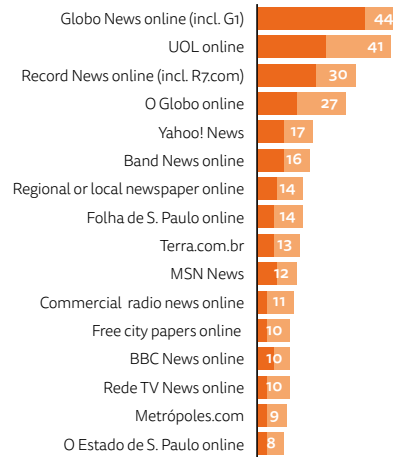
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

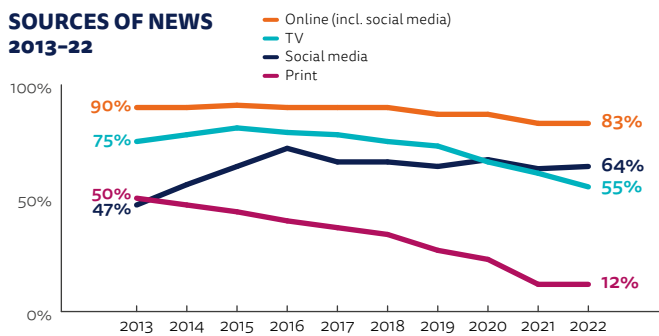


CHANGING MEDIA

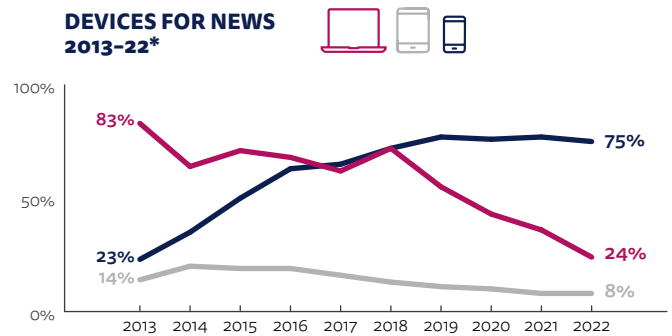
Audiences for traditional media such as TV and print have declined significantly in the last decade, while traffic to online and social media sites has remained relatively flat. Smartphones' use for news has rapidly increased with Brazil now having more smart devices than people.⁹⁶



SOURCES OF NEWS 2013-22



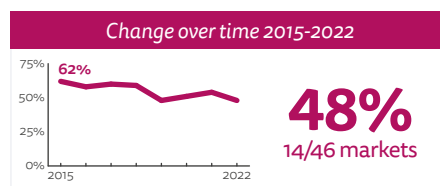
DEVICES FOR NEWS 2013-22*



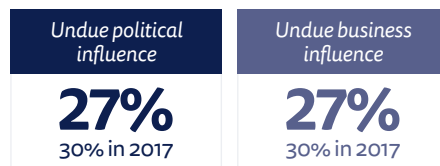
TRUST

Trust in news took a steep downturn, offsetting the recovery experienced in the last two years. Overall trust in news fell by six percentage points to 48%, amidst the anticipation of a highly polarised presidential campaign in the 2022 elections. As a result, the country has slipped seven places from last year and now ranks 14th among the 46 markets surveyed.

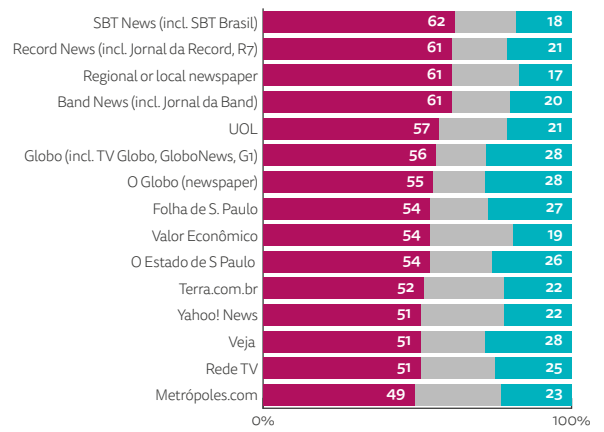
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

46%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	YouTube	43% (+4)	77%	4	Instagram	35% (+5)	64%
2	WhatsApp	41% (-2)	78%	5	Twitter	13% (+1)	24%
3	Facebook	40% (-7)	67%	6	TikTok	12% (+5)	29%

⁹⁶ <https://eaesp.fgv.br/sites/eaesp.fgv.br/files/u68/fgvcia2021pesti-relatorio.pdf>

CANADA

Protests in which truckers besieged the national capital in an anti-vaccination blockade highlighted growing divisions in Canadian society and declining trust in the news media. Meanwhile, news organisations have been innovating in order to engage hard-to-reach users and to build more sustainable businesses.

Pandemic fatigue and growing opposition to restrictions culminated in the convoy movement in February 2022, with dozens of trucks occupying downtown Ottawa near the Parliament buildings. Journalists, who had experienced increased online harassment since the first wave of COVID-19, were intimidated and even attacked in the streets while covering the protests. News organisations hired extra security and the CTV network even removed its logos from its vans as a measure of protection. Data from the crowdfunding site GiveSendGo, obtained through illegal hacking and released publicly, indicated that more than half of the support for the movement came from south of the border. The convoy was covered intensively by the US media, with personalities on Fox News and other conservative sources voicing support for the movement.

These events are perhaps the most extreme expression of the decline in overall trust in news over the past four years, from 58% to 42%, including a three-point fall this year. Canada still remains among the countries with relatively higher trust levels, but this position is not as reassuring as in previous years.

At the same time, somewhat ironically, the Canadian media has been doing better economically, in part thanks to government support and a boost in advertising revenue during the pandemic. Government support programmes have been criticised but they have allowed Canadian media some breathing space. Many organisations, such as the *Toronto Star*, the *National Post*, and *Journal de Montréal* are reinvesting in their newsrooms, and several are experimenting with new forms of collaboration. The *Globe and Mail* reports that its dynamic, personalised paywall increased subscriptions by 50%. *La Presse* reported a surplus of \$14 million.

Although local journalism remains a concern, there are also signs of renewal and growth. Overstory Media Group (OMG), a start-up focusing on newsletters and local brands in British Columbia, announced plans to hire 250 journalists and to launch 50 new outlets by 2023 and acquired a celebrated alternative weekly in Nova Scotia, *The Coast*. In the francophone Quebec market, which has particular challenges of scale, a group of regional dailies owned by local cooperatives completed its first year with an unexpected surplus.

The national Postmedia Network acquired the regional group Brunswick News, which owns almost all newspapers in New Brunswick, from the Irving family. Postmedia also created a partnership with Wise Publishing for personal finance content, and launched its own parcel delivery service. Torstar announced partnerships with digital publisher Curiosity, Enthusiast Gaming (AFK platform) and start-up incubator MaRS. The *Toronto Star* and the group's regional dailies were also redesigned.

The largest francophone media group, Quebecor Media, consolidated all the digital news and entertainment content of its multiple entities on a single app named QUB. *La Presse* partnered with Optable, a data connectivity platform designed to protect privacy, for targeted local advertising solutions. *The Globe and Mail* launched The Globe Women's Collective, with content and events focusing on gender inequities for women in business. Pattison Media, a broadcasting and digital media company with 48 radio stations in Western Canada, acquired part of Everything Podcasts based in Vancouver.

The Aboriginal Peoples Television Network (APTN) and the national public broadcaster, CBC/Radio-Canada, signed an agreement to collaborate on the development



Population	38m
Internet penetration	94%

and promotion of indigenous content. Meanwhile, the Canadian government committed additional funding of \$400m over four years for the public broadcaster to reduce its reliance on advertising on traditional and digital platforms, including sponsored content.

Tech platforms Google and Meta entered agreements with several of the biggest Canadian news organisations, raising concerns over lack of transparency and lack of support for smaller media outlets. A Canadian version of the Australian bargaining code, forcing digital platforms to share part of their revenues with news producers, has been tabled. A report by the Public Policy Forum recommended that this system use the same eligibility criteria as the Canadian journalism tax credit programme. The report also called for an expansion of a subsidy for local journalists.

Finally, news organisations in Canada are facing different challenges, such as hiring and retaining journalists in a context of labour shortage, as well as the transition from mostly remote to hybrid working practices. Reducing or redesigning office space is one way to adapt to this new reality. The use of videoconferencing apps for television interviews, adopted during the pandemic, provided some efficiency gains during the 2021 election campaign and may well become routine.

Colette Brin

Director, Centre d'études sur les médias, Université Laval

Sébastien Charlton

Coordinator, Centre d'études sur les médias

Professor Brin is chairperson of the Independent Advisory Board for Canada's journalism tax credit programme and is a member of the Steering Committee for the Department of Canadian Heritage's Digital Citizen Initiative.

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT (ENGLISH)



ONLINE (ENGLISH)



15%

pay for ONLINE NEWS

English 15% | French 16%

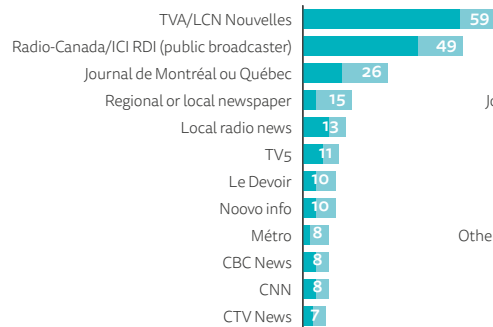
36%

listen to PODCASTS in the last month

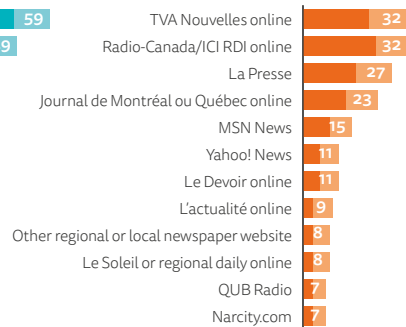
English 41% | French 29%



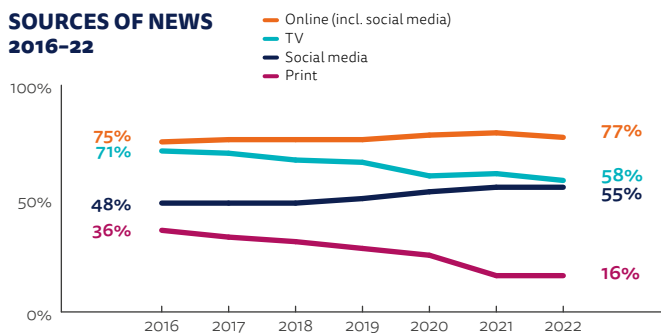
TV, RADIO AND PRINT (FRENCH)



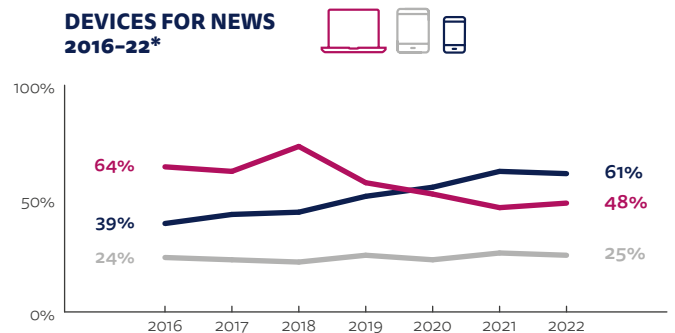
ONLINE (FRENCH)



SOURCES OF NEWS 2016-22



DEVICES FOR NEWS 2016-22*

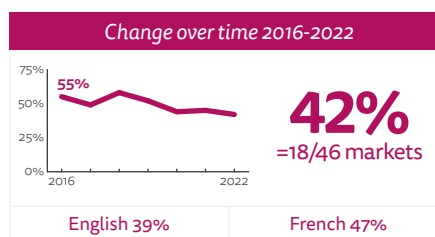


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Trust in news overall didn't benefit from the global 'pandemic boost' last year and fell three percentage points this year, reaching, at 42%, its lowest score yet. Growing dissatisfaction towards government and pandemic fatigue may have led to negative attitudes toward the media and perceptions that they are not critical enough of official sources such as public health authorities.

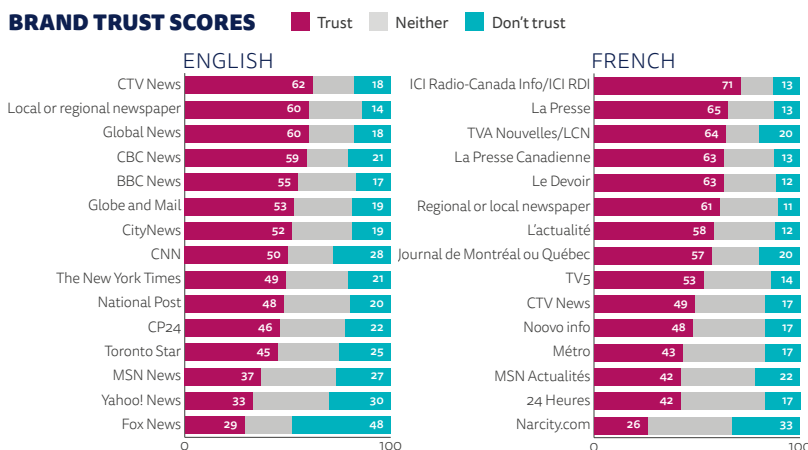
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...

Undue political influence	Undue business influence
29% 39% in 2017	27% 36% in 2017
English 27%	English 25%
French 38%	French 37%

BRAND TRUST SCORES



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	Change	For All
1	Facebook	40%	(-1)	68%
2	YouTube	32%	(+5)	68%
3	Facebook Messenger	18%	(-)	51%
4	Instagram	12%	(-1)	36%
5	Twitter	11%	(-)	23%
6	WhatsApp	9%	(+1)	25%

Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

CHILE

Presidential elections and the writing of a new constitution have taken centre stage amid controversy and some misinformation. The media has at times struggled to come to terms with these increasingly polarised national debates.

In a referendum in 2020, Chileans decided they wanted a new constitution and in the past year they have been choosing representatives to agree on the content, write the document, and find consensus. The ensuing media coverage has had ups and downs. One highlight, for those who believe in the press's watchdog role, came when the *La Tercera* newspaper uncovered that an independent representative, who had made electoral capital out of being an indebted cancer patient, had actually faked the disease. He resigned.

The imperative to explain the constitutional process has led newsrooms to introduce reporting teams dedicated to the subject. Some publishers have developed formats, such as newsletters and entire TV shows, to summarise and explain the week's events. It is not straightforward; the subject is complex, and there are many vested interests. At one point, sanctions were proposed for elected representatives who spread misinformation about the new constitution. The body overseeing the process hired a communications manager at the end of 2021 but they resigned soon after in frustration at the lack of resources and the unwillingness of elected representatives to take part in a communication strategy.

While this was going on in 2021, there were also multiple elections, including for the president. Neither of the two candidates came from the traditional coalitions which have governed Chile for the past 30 years, and with a heated level of debate there was concern over misinformation here too. The left-wing candidate Gabriel Boric, who was later elected president, called for live fact-checking during the debates. No media organisation had the capability to do this, but some newsrooms and independent projects did it later.

Twitter remains a preferred platform for discussion of politics, though it can sometimes become more of a collection of polarised bubbles of haters, entrenched positions, and misinformation. As political debates have raged, YouTube and Instagram have grown as platforms for mainstream news outlets to stream their shows, as well as places for highlights and clips.

Chile has two big newspaper groups. *La Tercera*, owned by conglomerate Copesa, is betting on a digital future; *El Mercurio*, considered the nation's paper of record, is focusing more on its core print output. For both, print readership is increasingly concentrated at the weekends.

There is one public television broadcaster, TVN, though this also takes advertisements and is dependent on the support of business. TVN has had better times; our survey shows that its news channel, 24 Horas, has lower trust ratings than private channels such as CNN Chile, CHV Noticias (CHV), Mega, and La Red. However, it is the third-most watched, and its website is the second-most visited. It has been criticised for its anchors being partial in their questioning, but public TV remains important for providing information across the country – it is the only channel with local news centres – and for having an international channel for Chileans living abroad.

The ownership of the private stations became an issue as several powerful voices vied for position in trying to make themselves heard. Some rich businesspeople tried – as yet unsuccessfully – to buy stations.

TV seems to be rising to the occasion, part of a trend seen last year as the media appeared to be attempting to rebuild trust.



Population	19m
Internet penetration	92%

One station, La Red, shifted from entertainment to a more serious agenda. Under a new executive director, the station adopted political programming and hired renowned investigative journalists, turning them into analysts and hosts. The station also announced it would no longer use online ratings to measure their audiences, to avoid its content being influenced.

Analysis, editorials, and opinion columns have become more prominent, for example on weekend morning TV news programmes with opinionated anchors who have the freedom to improvise. One notable case is Mega, which chose a sports journalist to host its programme. He was quickly noticed for his passionate editorials about current events and the station saw positive audience growth in that time slot.

There's been a notable increase in podcast consumption. Independent projects such as *Relato Nacional* and *Las Raras*, which produce narrative stories, coexist with audio initiatives by media houses like *La Tercera*, *Radio Cooperativa*, and *Emisor Podcasting* (Canal 13).

Francisco J. Fernández
Pontificia Universidad Católica de Chile
Enrique Núñez-Mussa
Michigan State University

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

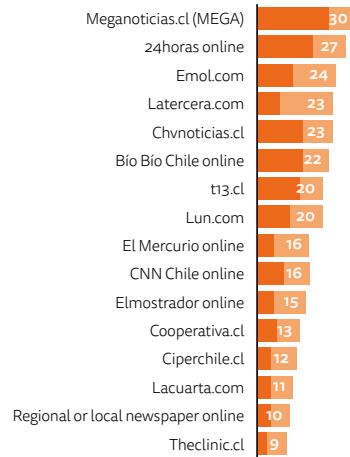
% Weekly usage

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- More than 3 days per week TV, radio & print
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TV, RADIO AND PRINT



ONLINE

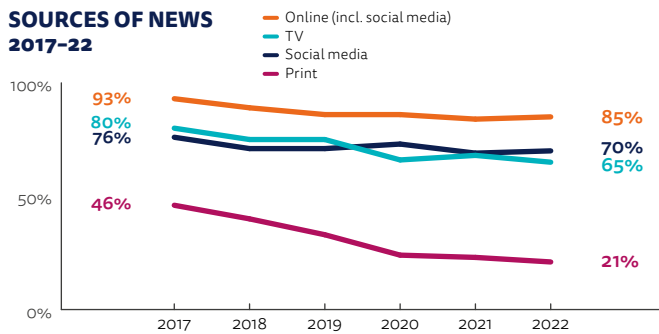


CHANGING MEDIA

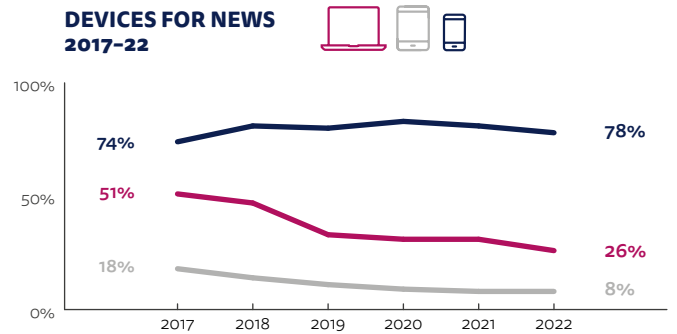
Instagram (36%) and YouTube (28%) have grown rapidly as platforms for news consumption, while traditional platforms like TV and newspapers continue to decline. Print readership has more than halved in the last seven years.



SOURCES OF NEWS 2017-22



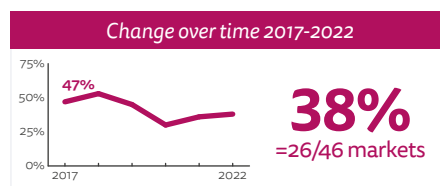
DEVICES FOR NEWS 2017-22



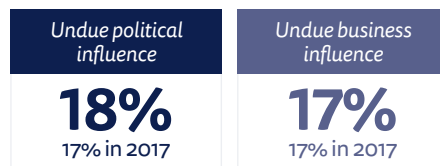
TRUST

Trust in media is low in the country (38%), and it is consistent with data showing that audiences largely do not think that media are independent of political and economic influence (at 18% and 17%, respectively).

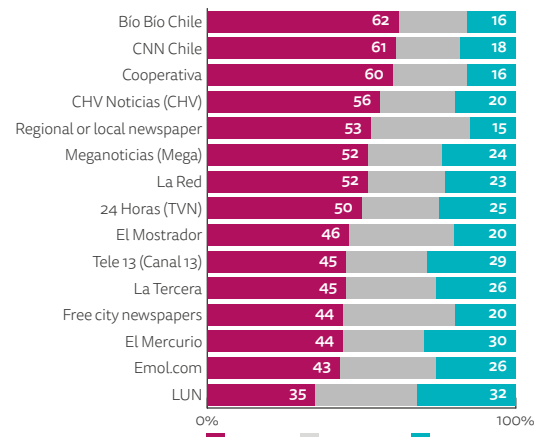
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	53% (-1)	75%	4	YouTube	28% (+4)	74%
2	Instagram	36% (+9)	64%	5	Twitter	19% (-)	30%
3	WhatsApp	31% (-5)	79%	6	Facebook Messenger	10% (+1)	35%

COLOMBIA

Presidential and congressional elections have dominated media coverage this year amid widespread concern about misinformation. High social media and smartphone usage in Colombia is pushing more big players to invest in digital, including the most widely read newspaper *El Tiempo*.

Media ownership in Colombia has historically been concentrated among a handful of private groups with links to economic and political elites. Colombians have traditionally turned to TV as their main source of information, but even the big free-to-air players such as Caracol News TV, part of privately owned Grupo Valorem, and RCN News TV, part of Ardila Lülle Organisation, and telenovela specialists RCN, have seen losses in audiences after the peaks of the pandemic.

Alternative TV news media are growing, and one, a nightly investigative strand called *Noticias Uno*, makes its debut in our survey in third position. It made its name as an investigative programme on the state-owned Channel 1, was critical of the former and current administrations, but later lost its slot on that channel, and was saved by a crowdfunding drive which raised enough for it to continue online. It is now shown on a pay cable channel and is thriving, thanks in part to consumers' appetite for independent and more critical coverage.

The fortunes of the print sector have risen slightly as the pandemic has eased. Titles that moved either to PDF versions or turned digital-only such as *ADN*, *Publimetro*, and *La Opinión* resumed their print operation, which had stopped during the pandemic. Higher paper costs due to a low offer of providers and devaluation are the current threats.

Cambio magazine, owned in the 1990s by Nobel laureate Gabriel Garcia Marquez, has been relaunched online. This seems to be part of an effort to counter the influential *Semana* magazine which, having been acquired by a group belonging to billionaire banker Jaime Gilinski, turned to the right.

Colombia has two national newspapers, *El Tiempo* and *El Espectador*, both now paywalled online, and both trying to fight back against print's long-term decline by innovating with editorial strategies in the hope of attracting online subscribers.

El Tiempo is reported to have more than 100,000 digital-only subscriptions, by some accounts the third biggest base in South America. It is winning subscribers by offering corporate discounts, and by partnering with Meta and the *Times of India* to use AI to predict which articles will generate the most subscriptions. *El Espectador* is hoping a return to core journalistic values, investing in product innovation, appealing to underserved audiences, and recommending relevant content to users automatically will boost its fortunes.

Colombia has seen the emergence of a number of important digital-first news brands such as *Las2Orillas* and *Pulzo*, which challenge mainstream media. The key to their approach is bringing users into their editorial processes. News aggregator *Pulzo* invites digital content creators and influencers to publish on their platform and share revenues. *Las2Orillas* strengthened its invitation to citizens to submit opinions and local news.

Presidential elections took place in May (and June), following massive popular protests in 2019–21 which placed the left in sight of the presidency for the first time in the country's history. The media are reflecting these shifts in society becoming more polarised, but our data have highlighted the increasing number of people who are disengaging from news: 74% of respondents said they often, sometimes, or occasionally try to avoid the news – one of the higher levels recorded in our survey.



Population	51m
Internet penetration	75%

Memes have become a popular form of political expression on social media, using satire and popular culture to undermine the credibility of candidates and political parties. But misinformation online and through social media and messaging apps continues to be an issue, with more than six in ten (61%) people saying they are concerned about what is real or fake online. Alleged interference in the Colombian electoral process by foreign governments, including Russia and Venezuela, has also been a recurrent news topic.

Colombian journalists have long faced intimidation from a variety of sources including rebel groups during the years of conflict. Paramilitaries-turned-drug traffickers directly attack journalists. Reporters Without Borders ranked the country at its lowest point in the World Press Freedom index for a decade, in spite of the 2017 peace accord which ended the conflict with the FARC guerrillas.

And while life as a reporter is difficult, high consumption of content through social and digital platforms has given journalists scope to develop personal followings. Colombians have the third-highest affinity towards paying attention to specific journalists over news brands, according to our data, which raises the question of whether a stronger connection with brands or journalists will lead to greater financial stability.

Víctor García-Perdomo

Associate Professor - Director of the Research Center for Digital Technology & Society, Universidad de La Sabana

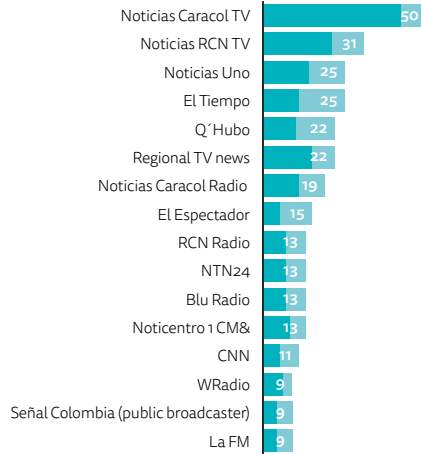
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

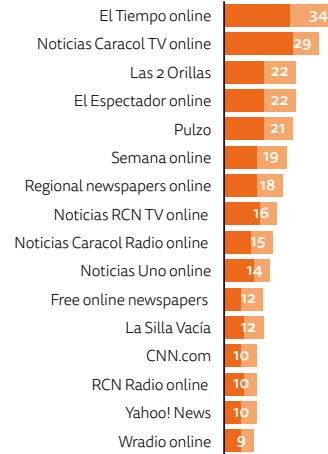
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TV, RADIO AND PRINT



ONLINE

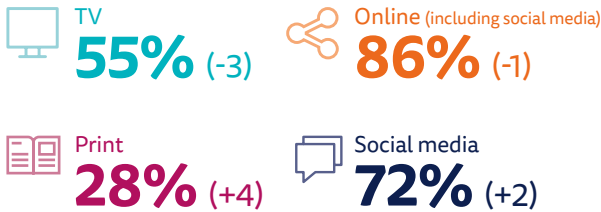


CHANGING MEDIA

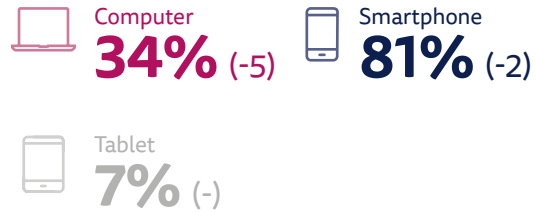
There is very high rate of mobile phone use, and Colombians in our more urban-based sample get their news more frequently online (86% including social media in our data) than from TV (55%) or print (28%). TikTok saw a particular rise, part of a wider trend with younger people across South America.



SOURCES OF NEWS



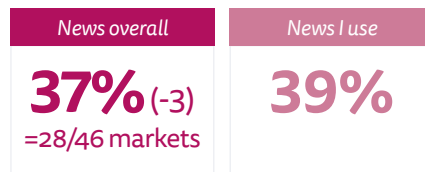
DEVICES FOR NEWS



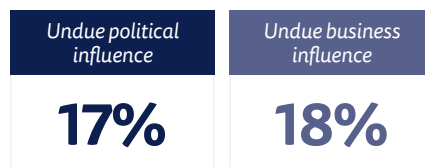
TRUST

Overall news trust is down by three percentage points (pp), from 40% last year. Additionally, trust in news that consumers specifically use went down 6pp from 45%, most likely linked to the increasing polarisation of news media due to congressional and presidential elections. Trust figures may also be affected by respondents' perceptions that the news media is subject to undue political or business influence.

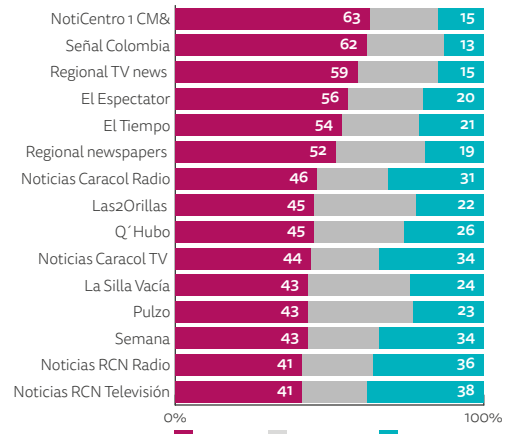
OVERALL TRUST SCORES



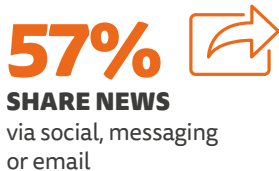
MEDIA IS FREE FROM ...



BRAND TRUST SCORES



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TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	65% (-2)	81%	4	Instagram	29% (+1)	58%
2	WhatsApp	40% (-5)	77%	5	Twitter	18% (-)	30%
3	YouTube	34% (-)	74%	6	Facebook Messenger	13% (-1)	34%

MEXICO

In some ways the Mexican news industry is like any other – it faces challenges of new platforms, big conglomerates, and changing consumption habits. But in other ways, it is very different; the industry has to contend with the president’s daily attacks on its credibility. Journalists continue to be murdered.

President Andrés Manuel López Obrador, known as ‘AMLO’, has had huge popular support since he was elected in 2018, helped by his direct communication with the public through social media, in particular his daily morning news briefings, known as the *mañaneras*. These have long been hostile to parts of the media, but in July 2021 they became more pointed when he added a ‘Who’s Who’ segment in which he singles out journalists and publications for running stories he says are untrue.

The president usually classifies the media into two groups: the ‘good’, those who favour his policies of transformation and report uncritically on his administration, and the ‘bad’, those he considers to be neoliberal and who, in his eyes, represent a corrupt past. In this latter group are broadsheets *El Universal* and *Reforma*, multimedia conglomerate Grupo Imagen, and news portal Latinus. They are joined by veteran TV news anchor Ciro Gómez-Leiva and talk show host Joaquín López Dóriga.

Also facing repeated criticism is columnist Carlos Loret de Mola, an outspoken critic of the administration. In February, the attacks against him led a group of journalists, politicians, media firms, and opinion leaders to take part in a Twitter Space, a streamed audio conversation, which had the hashtag #TodosSomosLoret (#We are all Loret). More than 60,000 people listened in as participants expressed their disagreement and concern about the government’s attitude to the media.

But the president remains unswayed. A resolution by the European Parliament⁹⁷ called on the president to tone down his rhetoric against the media to ‘ensure that human rights defenders and journalists

can continue their activities without fear of reprisal’. The Mexican government’s response was to decry the Parliament’s ‘uninformed’ attitude, telling the European legislators: ‘It’s unfortunate that like sheep you join the reactionary and coup-like strategy of the corrupt group that opposes [the administration].’⁹⁸

The rising death toll of journalists – 145 between 2000 and 2021 according to human rights group Article 19 – shows no sign of stopping. In 2021, seven journalists were murdered; another eight have been killed during the first three months of 2022. Most of those murdered have been covering security and political sources and were the victims of organised crime. Some received warnings before being killed – one, Lourdes Maldonado Lopez, who was killed in January, had even used a presidential *mañanera* in 2019 to appeal for the government’s help with protection.

Most of the national news brands are trying to adapt to younger audiences’ tastes, and are actively putting content on Instagram, TikTok, podcasts, and apps, as well as exploring a range of other new formats. The *El Financiero* newspaper distributes PDF versions of its print editions and has had some success in developing specialist financial email newsletters which are offered for free and which have become required reading for those interested in economics, politics, and finance. The TV station ADN40, part of the Azteca Noticias group, has started making its content available on Amazon Prime.

In 2021 a milestone in the history of commercial television in Mexico was reached with the merger of Grupo Televisa, one of the biggest players in information



Population	132m
Internet penetration	67%

and entertainment TV, with US-based Spanish-language network Univision. The new company, TelevisaUnivision, hopes to have the scale to compete globally in the Hispanic market through its streaming video platform, aiming to compete with Netflix, Disney+, and Amazon Prime.

The merger was one of the responses to global competitors, which the established media must count alongside audience polarisation, declining advertising revenues, and digital-born competition as key threats. UnoTV, which had begun life sending news by text messages and which grew into an influential news website through which it streams its news video programming, remains one of the top online news brands, behind *El Universal* and *TV Azteca*. However, despite all the challenges, traditional TV and radio are still the most popular and receive the most advertising revenue. At the start of the pandemic, some operators such as *El Economista* and *Milenio* dropped their paywalls, offering their digital content for free. None have yet put their paywalls back up.

María Elena Gutiérrez-Rentería
Universidad Panamericana

⁹⁷ European Parliament, ‘Mexico: The EP Calls for the Protection of Journalists and Activists to be Guaranteed.’ 10 March 2022. <https://www.europarl.europa.eu/news/es/press-room/20220304IPR24806/mexico-el-pe-pide-que-se-guarantece-la-proteccion-de-journalistas-y-activistas>

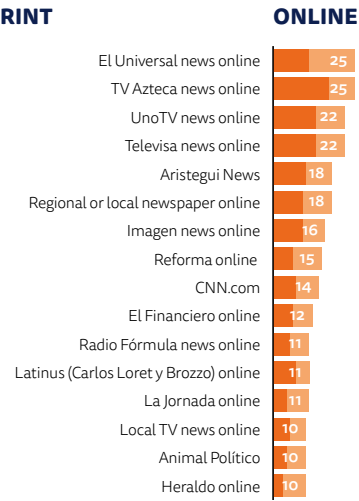
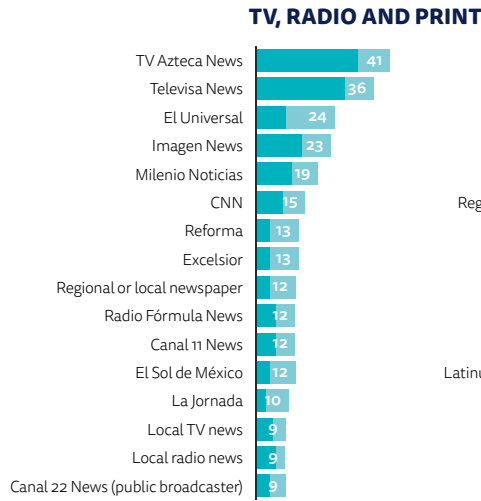
⁹⁸ Government of Mexico, ‘Statement from the Government of the Republic to the European Parliament.’ 10 March 2022. <https://www.gob.mx/presidencia/prensa/comunicado-del-gobierno-de-la-republica-al-parlamento-europeo?state=published>

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

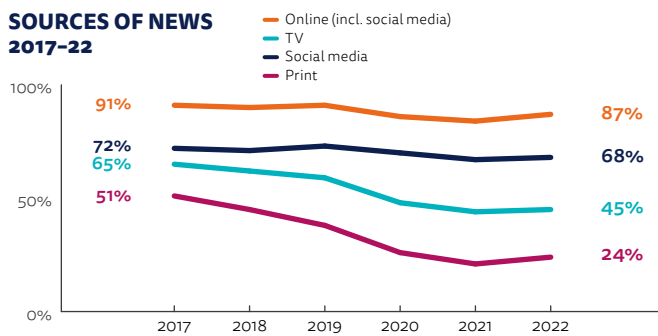


CHANGING MEDIA

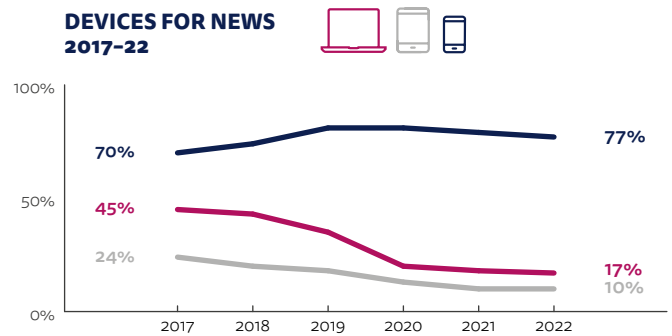
TV and print have become gradually less important since 2017 for our online sample, with social media widely used across age groups. Mexicans have some of the highest levels of accessing news on social media in our survey with Facebook, YouTube, and WhatsApp the most popular networks.



SOURCES OF NEWS 2017-22



DEVICES FOR NEWS 2017-22

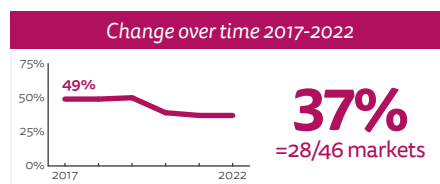


TRUST

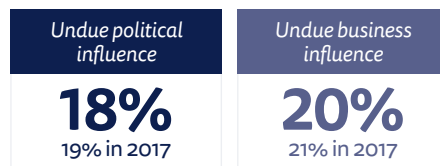
The general level of trust in the Mexican news industry remains relatively low at just 37% but trust in particular brands is up a few percentage points in most cases.

The companies with the highest level of trust are CNN and Milenio Noticias. Televisa Noticias saw the biggest increase (+ eight percentage points, pp) with TV Azteca Noticias registering an increase of 3pp in 2022, compared to the previous year.

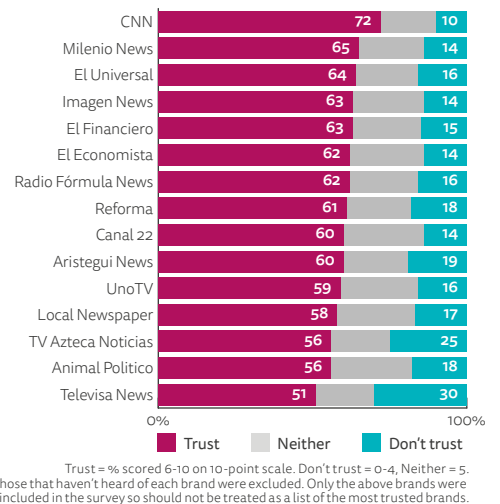
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	61% (+1)	79%	4	Twitter	16% (-1)	30%
2	YouTube	37% (-)	74%	5	Instagram	14% (+1)	42%
3	WhatsApp	30% (-5)	72%	6	Facebook Messenger	11% (-4)	41%

PERU

Partisan election coverage and rising hostility against the press contributed to a decline in trust in the media in a year in which Peru became the country with the world's highest COVID-19 death rate.

Presidential elections have dominated Peru's media activity in the past year. It's not been pretty. In April, two candidates – Keiko Fujimori and Pedro Castillo – were selected for the presidential run-off. Fujimori's Fuerza Popular party represented the conservative right and won support from centrists and far-right groups. Castillo's party, Perú Libre, is from the conservative left and obtained backing from the progressive left as well. On 6 June Castillo won the election by a razor-thin margin (44,058 votes).

The victory came despite parts of the mainstream media heavily backing Fujimori – notably El Comercio Group, which owns 80% of the print media and 70% of shares in América TV and Canal N.⁹⁹ Castillo and his party were portrayed negatively by these outlets, denounced as communists, and accused of having close connections with terrorist groups. An EU election monitoring group found the elections had been conducted with transparency and had met all regulations,¹⁰⁰ but said coverage was unbalanced and admonished the media for depriving the population of their right to objective and fair information.

Before the run-off, the news director of América TV and Canal N was fired after announcing that the stations would cover both campaigns fairly. Two more reporters were fired for complaining of bias and eight others resigned, condemning the stations' refusal to cover Castillo's closing rally while choosing to broadcast all of Fujimori's. The Ethics Court of the Peruvian Press Council found 'information bias in matters of public interest' by TV stations and said they had violated their own ethics guidelines.¹⁰¹

Audiences were not unaware of what was happening. A survey in late June revealed that 70% believed there was unequal coverage; among those, 84% believed the media favoured Fujimori.¹⁰² This probably goes a long way to explaining the loss in trust for most of the brands in this year's report, with the state-run media – daily newspaper *El Peruano* and TVPerú Noticias – registering the biggest losses (by seven and eight percentage points, pp, respectively). In addition, most of the top TV news stations also lost audiences, while regional and local newspapers and foreign media registered large gains. Consumers seemed to be actively seeking more diversity in their media choices.

Regional media covered Castillo's rallies which had massive attendances, especially in Andean areas such as Puno where the candidate won 89% of the votes. The regional press also won plaudits because, for the first time, debates were held outside Lima. Local reporters' expertise and familiarity with regional politics were crucial in understanding voters.

Castillo, a schoolteacher, led a consequential national strike in 2017, and ran his election campaign focusing on rallies. He was characterised as not trusting mainstream media, and rarely gave interviews. Since taking office, several of his ministers and associates nominated for senior roles in the government have been criticised by the media for not having the right credentials or experience for their roles. Some had criminal records or had outstanding accusations against them – including Castillo's third prime minister who lasted only seven days in office after police reports surfaced that alleged he

had beaten up his wife and daughter. Castillo and his party have been hostile towards the press and have threatened to remove state advertising from media that do not favour them.¹⁰³

But hostility against the press doesn't come just from the government. The National Association of Journalists (ANP) reported a total of 206 attacks against journalists in 2021. Almost half came from civilians; some even came from candidates. Far-right protesters, bolstered by some conservative candidates, have picketed reporters' homes. Journalists working for digital media received the largest number of attacks (84) perhaps being perceived as the most independent. They also have growing audience figures. In addition to investigative site Ojo Público, other rising digital natives are La Encerrona (9%) – a news service created at the beginning of the pandemic – and Epicentro TV (5%) – a digital video offering founded by journalists who had been fired or had resigned from market leader América TV, while older and more established IDL Reporteros, La Mula, and Wayka each registered around 7–8% of the online audience.

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San Diego State University



Population	33m
Internet penetration	82%

⁹⁹ <https://revistaideele.com/ideele/content/grupo-el-comercio-un-pulpo-de-los-medios-de-comunicaci%C3%B3n>

¹⁰⁰ https://www.eeas.europa.eu/eeas/reinforced-election-expert-mission-deployed-european-union-hands-over-today-its-final-report-o_en

¹⁰¹ <https://tribunaldeetica.org/caso/caso-n-006-2021-grupo-la-republica-cpr-america-tv-y-ppi-canal-n/>

¹⁰² <https://iep.org.pe/wp-content/uploads/2021/06/Informe-IEP-OP-junio-II-2021-completo.pdf>

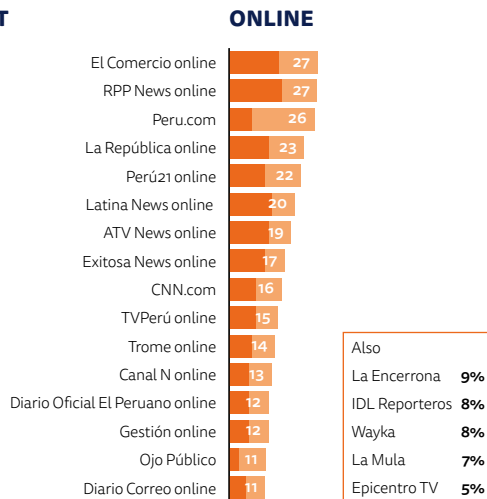
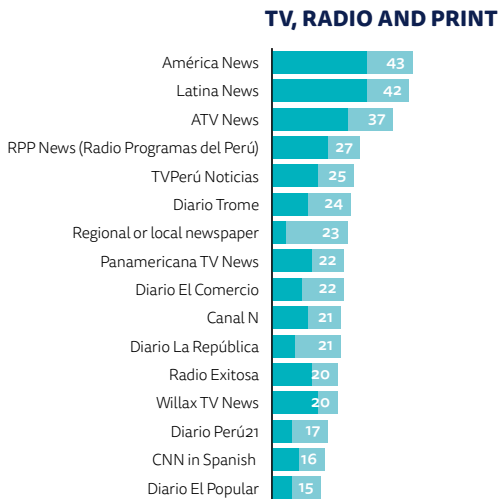
¹⁰³ <https://latamjournalismreview.org/news/peruvian-president-threatens-to-remove-state-publicity-from-media-that-misrepresents-reality/>

WEEKLY REACH OFFLINE AND ONLINE

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% Weekly usage

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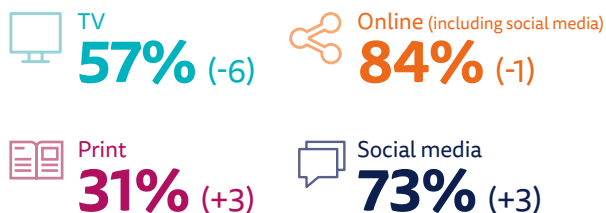


CHANGING MEDIA

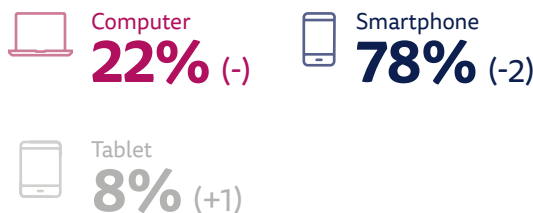
Television is an important source of news but most of the top broadcasters registered losses this year, in line with wider trends. Peruvians are heavy users of social media, with Facebook, YouTube, and WhatsApp most widely used for news.



SOURCES OF NEWS



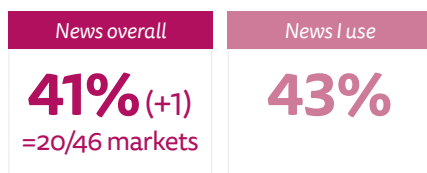
DEVICES FOR NEWS



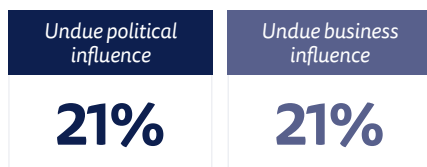
TRUST

Overall trust in news remained largely stable over the last year, however, losses in trust in specific brands have happened across the board with state-run media, *El Peruano* (newspaper) and TVPerú Noticias registering the biggest losses (by 7pp and 8pp respectively).

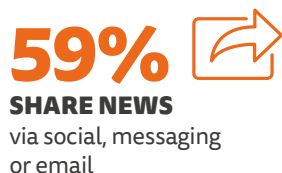
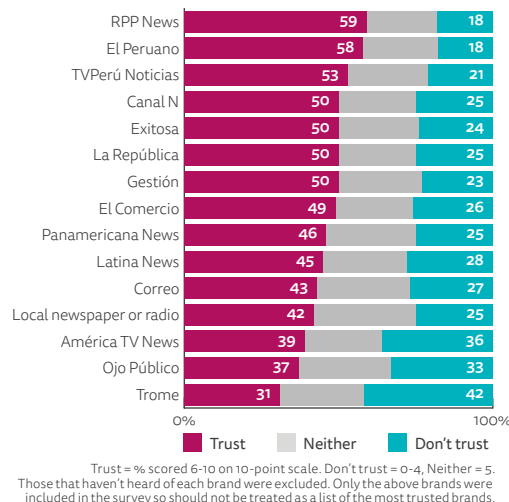
OVERALL TRUST SCORES



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	67% (-2)	81%	4	Instagram	22% (+4)	47%
2	YouTube	39% (+4)	74%	5	TikTok	16% (+9)	37%
3	WhatsApp	34% (-8)	70%	6	Twitter	15% (+2)	26%

3



SECTION 3

Analysis by Country and Market

Asia Pacific

ASIA PACIFIC

3.33	Australia	130
3.34	Hong Kong	132
3.35	India	134
3.36	Indonesia	136
3.37	Japan	138
3.38	Malaysia	140
3.39	Philippines	142
3.40	Singapore	144
3.41	South Korea	146
3.42	Taiwan	148
3.43	Thailand	150

AUSTRALIA

Emerging from one of the worst years in media history, Australia saw signs of recovery in 2021. The advertising market grew, numbers paying for news online increased, and support systems for regional journalism are being developed. At the same time, a new regulatory framework has eased the power imbalance between news publishers and tech giants.

After months of tense negotiation between the government and the major platforms, including Facebook withdrawing from the Australian news market for a few days, the News Media and Digital Platforms Mandatory Bargaining Code came into effect in March 2021. This mandatory code of conduct governs commercial relationships between news businesses and designated digital platforms where there is a significant bargaining power imbalance. The threat alone of such designation by government has led the major platforms – Meta and Google – to strike commercial deals with news outlets through three- to five-year voluntary content agreements, with funds flowing into the news sector. The Chair of the Australian Competition and Consumer Commission has hailed a successful outcome citing ‘over AU\$200m per annum going into journalism’ and ‘just about every major media organisation’ having a deal with Meta and Google.¹⁰³ Many companies, including Nine Entertainment Co., News Corp. Australia, Australian Community Media, the *Guardian*, and the ABC, have benefited, but others have missed out, including public broadcaster SBS. The Code has been criticised for not including small media companies, and lacking transparency. But there are some promising signs of extra funds being spent on public interest journalism, with the ABC for example recruiting 55 new regional-based journalists.

The second major media policy initiative sought to modernise television regulation. After a year-long consultation, in March 2022 the Australian government released a Media Policy Statement outlining a range of reforms to the sector. They include support for Australian content faced with competition from global streaming services,

where service providers will be forced to spend up to 5% of their gross local revenues on Australian content. The government also promised an AU\$10 million regional journalism fund to support new recruits in the region and to reskill the workforce.

Australia has a highly concentrated media market. News Corp Australia (59%) and Nine Entertainment Co. (23%) own more than 80% of the metropolitan and national print media markets. The top four media companies control 95% of revenue among daily newspapers, over 75% of total revenue in free-to-air television, and about 70% of radio revenue (Brevini and Ward 2021; Stanford 2021).

Advertising revenues are slowly bouncing back from the COVID-19 downturn. Lockdowns and working from home have created record levels of audience reach and advertising for traditional free-to-air broadcasters and streaming services. Australian subscription VOD penetration increased from 43% of households in 2018 to 70% in 2021¹⁰⁴ and Netflix, with over 5 million subscribers in Australia, reported revenues up by 17% in 2021.

Australian audiences, as elsewhere, prioritise streaming services and music over news subscriptions, but our 2021 data do show a five percentage point (pp) increase in those paying for news online to 18%. Other developments suggest an uneven recovery. Newspaper revenues have declined by 37% between 2014 (AU\$3.90bn) and 2020 (AU\$2.46bn) and are projected to decline even further.

According to the Public Interest Journalism Initiative, more than 230 Australian newsrooms have downsized since January 2019, of which 70% were in the regions. A major regional newspaper company,



Population	26m
Internet penetration	84%

Australian Community Media, closed over 20 regional newspaper titles in 2021 while overall in the regions, 37 newspapers closed or contracted and 30 emerged.

The Code of Practice on Disinformation and Misinformation was launched in February 2021. Signatories committed to measures to reduce the spread of online dis- and misinformation, notably labelling or demoting content deemed to be false. In March the Australian Communications and Media Authority reported to government on the adequacy of the platforms’ actions, suggesting more could be done and agreeing to oversee the self-regulatory scheme. The 2022 federal election is likely to test whether these measures help news audiences navigate the flow of political information on social media.

Sora Park

News and Media Research Centre, University of Canberra

¹⁰³ Interview with Rod Sims, March 2022. <https://www.youtube.com/watch?v=VB1FobBJXMo>

¹⁰⁴ Media Consumer Survey 2021. <https://www2.deloitte.com/au/en/pages/technology-media-and-telecommunications/articles/media-consumer-survey.html>

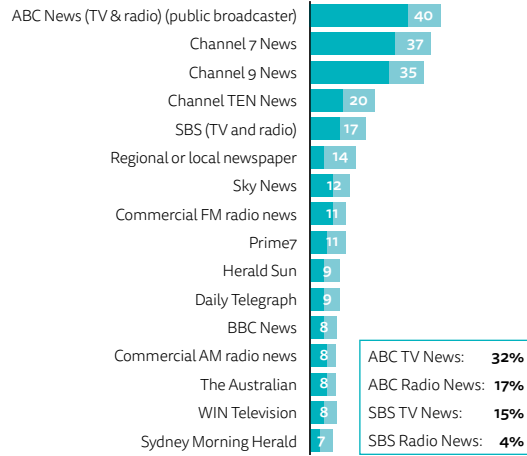
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

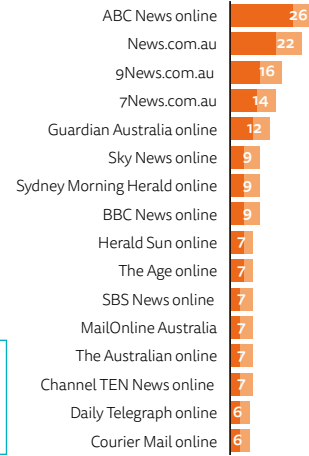
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

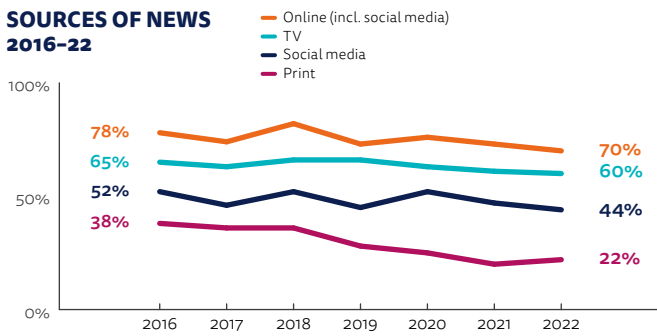


CHANGING MEDIA

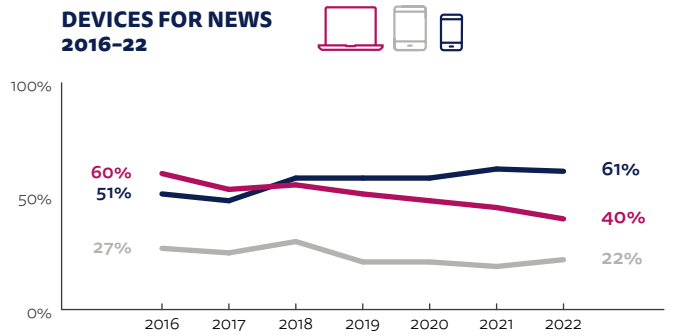
News access continue to decline with a slight recovery in newspaper consumption (+2pp), which was hit hard in 2021. News access on smartphones remains stable (61%), but computer access to news continues to decline at a rapid pace (-5pp).



SOURCES OF NEWS 2016-22



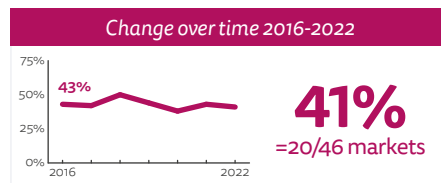
DEVICES FOR NEWS 2016-22



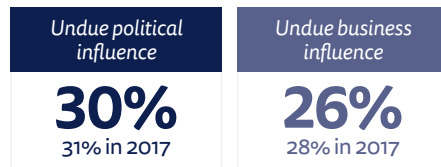
TRUST

Trust in news (41%) is slightly down, placing Australia in the mid-range among the 46 countries. Trust in news brands has also declined across the board with commercial broadcasters suffering most. Amidst crises such as COVID-19 and major flooding, accurate, up-to-date local news is critical to audiences' trust. Local or regional newspapers are ranked third, after the two public broadcasters.

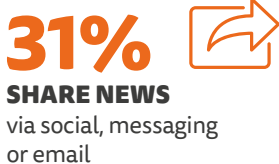
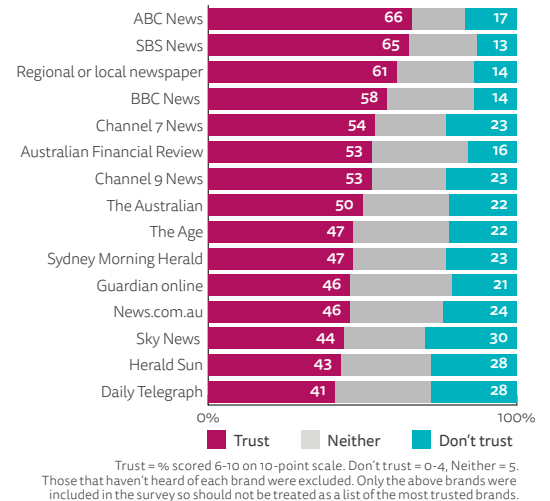
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	31% (-2)	67%	4	Facebook Messenger	11% (-)	51%
2	YouTube	19% (-1)	57%	5	Twitter	11% (+2)	18%
3	Instagram	11% (+1)	35%	6	WhatsApp	6% (-3)	26%

HONG KONG

Press freedom faces unprecedented strain in Hong Kong as news outlets critical of the Hong Kong and Chinese governments have been shut down and senior executives arrested following the enactment of the National Security Law. Meanwhile, further waves of COVID-19 infection have continued to adversely affect the finances of media companies.

Initial concerns that the National Security Law enacted in 2020 would suppress critical news coverage became reality as the Hong Kong Police used its sweeping powers to raid the offices of the newspaper *Apple Daily* and digital outlet Stand News and arrested editors and executives for 'collusion with a foreign country or with external elements to endanger national security' and 'conspiring to publish seditious material', respectively. While the former involves the use of the new National Security Law, the latter involves the use of an old and rarely employed section of the Crimes Ordinance. Both outlets, which have featured prominently in the *Digital News Report's* list of top news outlets since 2017, eventually shut down as the police froze their assets. *Apple Daily* printed 1 million copies of its final edition, compared to its usual 80,000 print-run, and they were sold out throughout newsstands in Hong Kong.

Following the closure of Stand News, other independent digital news outlets decided to cease operations. The most notable was Citizen News, as editors and journalists feared that their reporting could result in their arrest due to the broad and vague scope of the National Security Law. Another digital outlet Initium, which has over 60,000 subscribers, relocated its headquarters to Singapore, while several public figures in Hong Kong withdrew their opinion columns from the established dailies. Some had their columns axed. Other media outlets, such as the liberal-leaning *Ming Pao*, added disclaimers to their opinion section, stating that the articles have 'no intention to incite others'.

The closures of the three outlets resulted in the loss of over 1,000 media-related jobs as well as questions among local and foreign journalists on how they can do their work

under the new rules. A survey of journalists by the Foreign Correspondents' Club, Hong Kong (FCC) showed that over 80% of respondents thought that the working environment has 'changed for the worse' and over half have, slightly or considerably, engaged in self-censorship of content.¹⁰⁵ The release of the survey results drew an immediate rebuke from China's Foreign Ministry office in Hong Kong, which accused the FCC of 'smearing of Hong Kong's press freedom' and playing up the extent of interference in Hong Kong's affairs.¹⁰⁶ Meanwhile, overseas journalists continued to have their visa applications or renewals rejected without explanation.

The editorial independence of Radio Television Hong Kong (RTHK) continues to deteriorate as the government increasingly asserts its authority over the public broadcaster that was perceived by pro-government supporters to have provided favourable coverage towards protesters during the anti-extradition protests in 2019. Along with the purging of its social media accounts and online content archives, it has cancelled several well-known current affairs programmes, such as *City Forum*, a live debate format that had been broadcast for over four decades. A new set of editorial policies and guidelines has emphasised the need for its staff to 'identify itself with national interests'.¹⁰⁷

In addition to the national security law, news media organisations and journalists may soon also have to contend with a fake news law that has been touted by government officials as essential to stop the spread of misinformation. This could entail prosecuting those who spread misinformation and requiring news organisations to remove content.



Population	7.6m
Internet penetration	89%

On the business side, Hong Kong's staunch adherence to a zero-COVID strategy since 2020 and the adverse economic impact of this meant that advertising revenue for many media outlets experienced sharp declines. A few media companies addressed this shortfall by adding new revenue streams, most notably in e-commerce such as the establishment of an online store by the *Ming Pao* newspaper and the acquisition of an e-commerce retailer by TVB. Meanwhile, the closing down of the critical news outlets might have implications for Hong Kong citizens' willingness to pay for online news. After the 2019 protests, many supporters of the pro-democracy movement had been donating to outlets such as Stand News, but there is less opportunity to financially back independent journalism now.

Michael Chan, Francis Lee, and Hsuan-Ting Chen
Chinese University of Hong Kong

¹⁰⁵ 'The Foreign Correspondents' Club, Hong Kong, Membership Survey on Press Freedom'. <https://www.fcchk.org/membership-survey-on-press-freedom/>

¹⁰⁶ 'Commissioner's Office Urges FCC to Stop Vilifying Hong Kong's Rule of Law under the Cover of Press Freedom'. http://hk.ocmf.gov.cn/eng/fyrth/202111/t20211105_10444672.htm

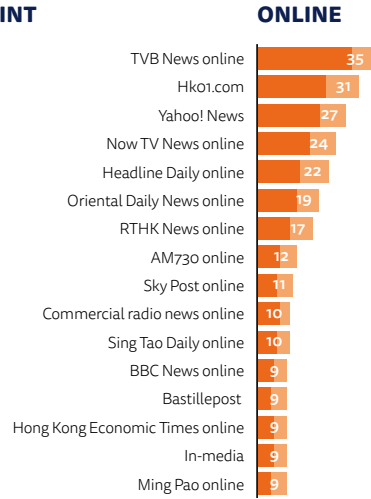
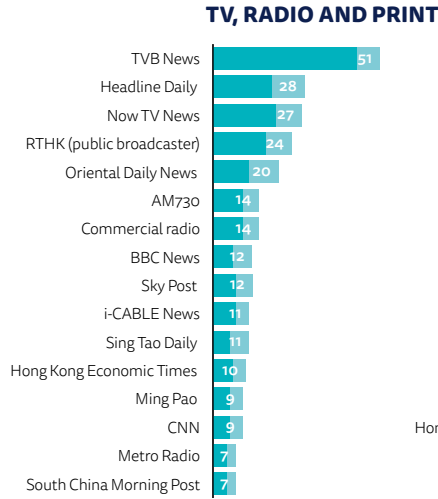
¹⁰⁷ 'Editorial Policies and Processes of Radio Television Hong Kong'. http://rthk9.rthk.hk/about/pdf/epp_eng.pdf

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

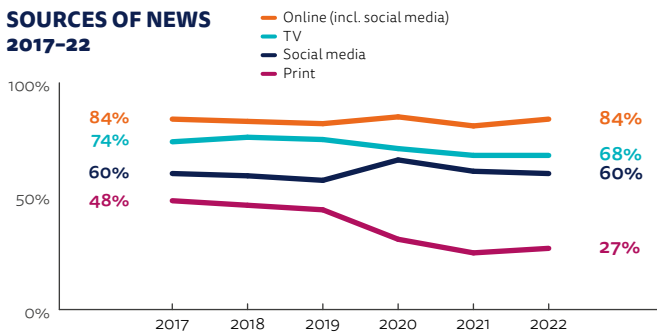


CHANGING MEDIA

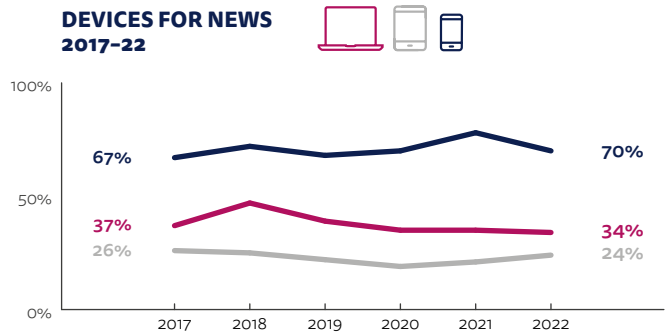
The proportion of respondents consuming the most popular online outlets generally did not increase significantly after the closing down of critical outlets *Apple Daily* and *Stand News*, but the reach of independent news site *inmediahk.net* increased from 4% to 9%.



SOURCES OF NEWS 2017-22



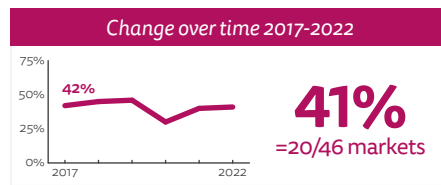
DEVICES FOR NEWS 2017-22



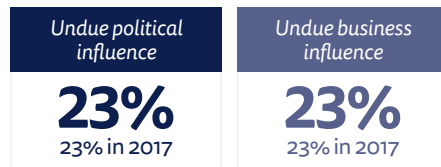
TRUST

The proportion of respondents who trust the news in general has remained stable. Trust in most specific brands has increased somewhat, with the exception of the public broadcaster Radio Television Hong Kong (down six percentage points), which experienced a change in leadership and a substantial adjustment in its public affairs programming during 2021.

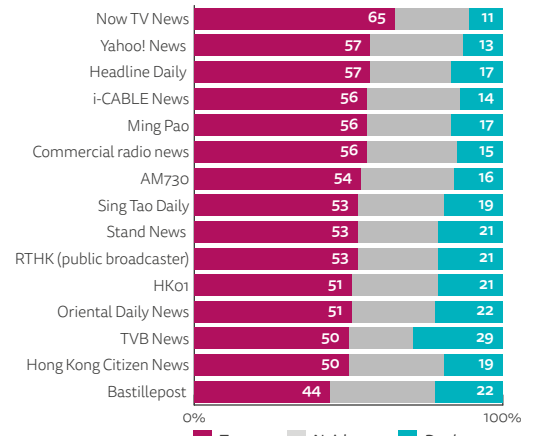
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

49%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	46% (-3)	72%	4	Instagram	17% (+3)	41%
2	YouTube	36% (-)	69%	5	WeChat	12% (-1)	43%
3	WhatsApp	33% (-3)	78%	6	Facebook Messenger	7% (-)	26%

INDIA

Indian media are diverse, with numerous outlets operating in English and multiple regional languages. The sector has been hard hit by the pandemic, with falling advertising revenues and widespread journalistic layoffs. Despite a devastating second COVID wave, which also claimed the lives of several journalists, the sector is showing signs of recovery.

Television brands NDTV 24x7, India Today TV, and BBC News are the most popular offline brands with our mostly English-language internet-using survey respondents, along with national newspapers such as the *Times of India*, *Hindustan Times*, and *The Hindu*. Print and broadcast television channels are self-regulated in India, with several television channels infamous for sensationalising news and conducting polarised debates. Print media recovered from the pandemic slump with an overall reported revenue growth of 20% in 2021,¹⁰⁸ including a strong bump from advertisements.

But legacy media platforms are facing stiff competition online from vibrant, digital-born brands that pursue independent journalism. Many rely on non-profit revenue models, such as grants and reader donations to supplement advertisements. Other digital-born brands such as NewsLaundry are entirely driven by subscriptions and donations. The Wire takes strong editorial positions that are anti-establishment and investigative in nature, while NewsLaundry eschews editorial positions altogether and believes in portraying diverse viewpoints from the ground. The News Minute caters specifically to news from South India while The Quint aims to build community partnerships through its citizen journalism initiatives and fact-checking services, in addition to regular news. The digital market saw an overall growth of 29% in 2021, with advertising and subscription revenues growing at 29% each.¹⁰⁹

India is a strongly mobile-focused market, with 72% accessing news through smartphones and just 35% via computers. News aggregator platforms and apps such as Google News (53%), Daily Hunt (25%), InShorts (19%), and NewsPoint (17%) have become an important way to access news and are valued for convenience.

Social media are popular in India, with a significant number in our surveyed audience using YouTube (53%) and WhatsApp (51%) for accessing news. Short-form video app TikTok was banned in 2020 for security reasons, along with several other Chinese apps, but is being replaced by home-grown apps like Moj, Roposo, and Josh, along with platform-based features like Instagram Reels.

The popularity of social media is a concern for policy-makers as these platforms are also rife with misinformation, as well as incessant trolling and abuse. Independent reporting suggests such behaviour is sometimes coordinated by actors close to major political parties.¹¹⁰ In April this year, the government banned several YouTube news channels for spreading misinformation that harmed the 'national security' and 'foreign relations' of the country.¹¹¹ The ban was carried out under the recent IT rules framed in February 2021 that have been challenged by social media platforms and news publishers alike. In a further development, Facebook came under intense scrutiny after media investigations revealed the platform had pushed polarising content and misinformation in the form of advertisements, favouring the ruling party BJP, during the election seasons in 2019 and 2020.¹¹²



Population	1393m
Internet penetration	54%

Meanwhile, the Competition Commission of India (CCI), has launched an investigation into complaints that Google has allegedly abused its dominant position in the online news market. As in other countries, publishers claim they are not being compensated fairly for the content accessed via third-party digital platforms.¹¹³

India is ranked 150th in the World Press Freedom Index 2022, dropping eight places from the previous year, indicating challenging times for press freedom in the country. The independent Kashmir Press Club (KPC) was forcibly taken over in January by members allegedly close to the local administration in the presence of armed police – a move the Editors Guild of India described as part of 'the continuing trend to smother press freedom'.¹¹⁴ Meanwhile new accreditation rules have been introduced for journalists by the Ministry of Information and Broadcasting which state, among other conditions, that accreditation could be suspended if work is deemed to harm the larger interests and sovereignty of the nation.¹¹⁵ In a move to address concerns of the right to privacy and freedom of expression of its citizens, the Supreme Court of India set up a committee to probe allegations of the use of Pegasus spyware on journalists, activists, students, and civil society members in the country.¹¹⁶

Anjana Krishnan
Research Associate, Asian College
of Journalism, Chennai

¹⁰⁸ The numbers are as per FICCI's *Tuning into Consumer* report published in March 2022. The print media grew from Rs. 189.9bn (\$2.5bn) in 2020 to Rs. 227.2bn (\$2.9bn) in 2021. The figures are for the media and entertainment industry as a whole, in which news media are included.

¹⁰⁹ https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/topics/media-and-entertainment/2022/ey-ficci-m-and-e-report-tuning-into-consumer.pdf

¹¹⁰ <https://thewire.in/teknog/en/1.html>

¹¹¹ <https://theprint.in/india/india-bans-22-youtube-channels-for-peddling-lies-about-security-foreign-policies/903342/>

¹¹² <https://www.aljazeera.com/economy/2022/3/14/how-a-reliance-funded-company-boosts-bjps-campaigns-on-facebook>

¹¹³ <https://www.telegraphindia.com/india/competition-commission-of-indias-glare-on-googles-online-news-revenue/cid/1858036>

¹¹⁴ <https://twitter.com/IndEditorsGuild/status/1482645879760715776/photo/1>

¹¹⁵ <https://www.thehindu.com/news/national/govt-issues-new-media-accreditation-guidelines/article38394463.ece>

¹¹⁶ <https://www.thehindu.com/news/national/supreme-court-judgment-on-pegasus/article37184269.ece>

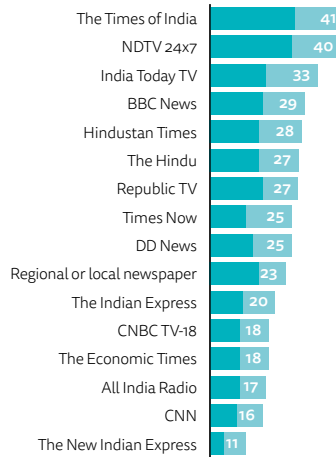
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

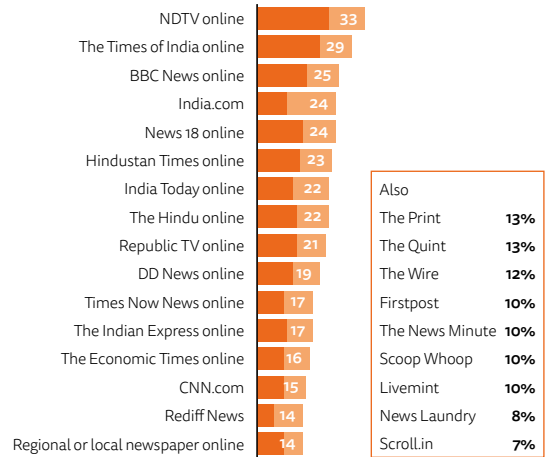
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE



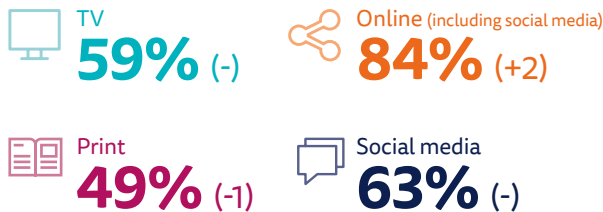
Brand	Weekly use	More than 3 days per week
Also		
The Print	13%	
The Quint	13%	
The Wire	12%	
Firstpost	10%	
The News Minute	10%	
Scoop Whoop	10%	
Livemint	10%	
News Laundry	8%	
Scroll.in	7%	

METHODOLOGY NOTE

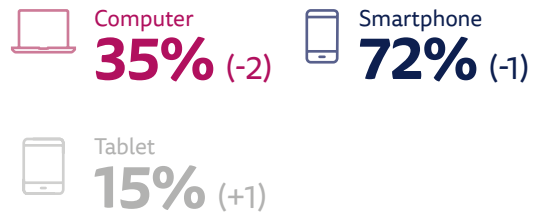
These data are based on a survey of mainly English-speaking, online news users in India – a small subset of a larger, more diverse, media market. Respondents are generally more affluent, younger, have higher levels of formal education, and are more likely to live in cities than the wider Indian population. Findings should not be taken to be nationally representative.

CHANGING MEDIA

SOURCES OF NEWS



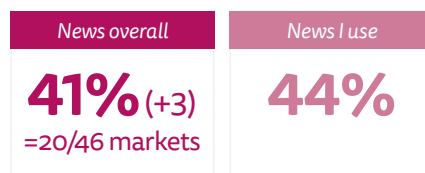
DEVICES FOR NEWS



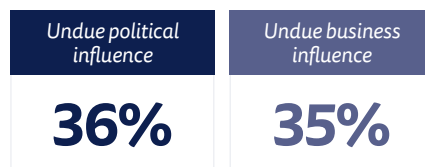
TRUST

India registered a small increase in news trust, improving its overall position among the 46 markets. Legacy print brands and public broadcasters, such as DD News and All India Radio, continue to enjoy high trust among the survey respondents, while 24-hour television news channels are less well trusted – along with newer digital-born brands like The Print and The Wire.

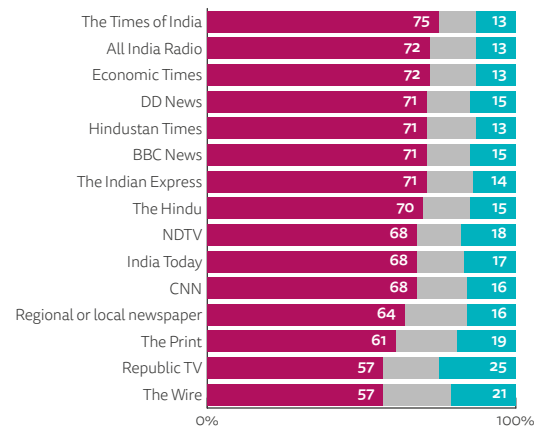
OVERALL TRUST SCORES



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

60%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	YouTube	53% (-)	76%	4	Instagram	32% (+5)	55%
2	WhatsApp	51% (-2)	76%	5	Twitter	22% (+3)	35%
3	Facebook	43% (-)	62%	6	Telegram	21% (+3)	41%

INDONESIA

Although Indonesia has had a well-deserved regional reputation for press freedom since the fall of Soeharto in 1998 and the subsequent passage of the 1999 Press Law, the implementation of laws on electronic communications have threatened to undermine the independence of the digital media sector.

Indonesia's media environment is diverse, and independent outlets express a wide variety of views. With the government no longer the primary source of censorship, powerful media companies owned by tycoons have come to dominate the media landscape.

The Ministry of Communication and Information Technology and the Indonesian Broadcasting Commission (KPI) licence broadcast media, and there are few restrictions on news production and distribution for Indonesians. Foreign ownership of broadcast media is banned under the 2002 Broadcast Act.

Although the independent Press Council is supposed to adjudicate all media disputes, authorities continue to bring defamation charges to the courts. Defamation is an offence covered by more than 40 provisions of the Criminal Code.

Despite the generally positive outlook for independent media, the last few years have seen disturbing encroachments on digital expression. The 2008 Electronic Information and Transactions Law (ITE) contains criminal penalties for those found guilty of distributing, transmitting, and/or making electronic information containing libel accessible to the public. Although the law was intended to regulate e-commerce, it contains a number of vague and imprecise offences with penalties including arrest and detention. Any kind of electronic communication – including social media – is fair game under the law, as are all manner of 'insults', including blasphemy.

In November, Muhammad Asrul, a reporter for the Berita News website who investigated alleged local corruption in South Sulawesi, was convicted of criminal defamation under the ITE Law and sentenced to three months

in jail.¹¹⁷ Although the Press Council issued a statement condemning the local court's decision, its competence in this case was denied by the prosecutor's office, which claimed that Berita News was not registered as a media outlet when Asrul's articles were published and that this therefore justified them treating the matter as a criminal case.

Equally worrying to civil society groups and advocates for press freedom is Ministerial Regulation 5 (MR5), which was quietly introduced in late November 2020 by the Ministry of Communication and Information Technology. The regulation governs the functioning of private 'electronic systems operators' (ESOs) accessible in Indonesia, which includes social media, search engines, e-commerce platforms, games, and communications services. It applies both to Indonesian services and platforms and multinational companies such as Facebook, Twitter, Google, TikTok, and others.

Granting the government authority to regulate private ESO activity, MR5 gives authorities access to user data, and provides for sweeping notice and takedown orders. According to the international human rights organisation Article 19, the regulation 'introduces excessive penalties for noncompliance, from fines to full shutdown of services in Indonesia.'¹¹⁸

Coronavirus has affected the overall Indonesian economy, and media have suffered primarily through a loss of advertising revenue. The venerable newspaper *Suara Pembaruan* stopped its print edition in February 2021. Other legacy print publications, such as *Tempo* magazine, *Kompas* newspaper, and *The Jakarta Post*, have strengthened their paywalls and experimented with a membership model, offering daily newsletters to subscribers.



Population	276m
Internet penetration	77%

Social media sites such as WhatsApp, YouTube, Facebook, and Instagram are extremely popular among users in Indonesia, with 68% of Indonesians reporting getting their news from social platforms – an increase of 4% over last year. Most Indonesians (83%) report using their smartphones to obtain news, and the use of laptops for this purpose has diminished by 8%.

Our data show TikTok is used by nearly half (45%) of 18–24-year-olds – in December, millions of users saw videos of a volcanic eruption on the island of Java, with images of villagers fleeing smoke, ash, and hot mud.¹¹⁹

Because of the growing popularity of social media as a source of news, much attention has been directed at its role in spreading disinformation, political propaganda, 'hoaxes', and hate speech. COVID-19 in particular has led to a flood of misinformation, and it is widely acknowledged that many politicians and party organisations use automated accounts and paid commenters, known locally as 'buzzers', to promote their interests.¹²⁰

In response to concerns about the prevalence of disinformation on social media, Indonesia is home to Mafindo (the Indonesian Anti-Hoax Community), a multi-stakeholder NGO that boasts of having more than 15,000 members. Along with Cek Fakta, a collaborative organisation devoted to fact-checking, Mafindo offers citizens a means of stopping dissemination of disinformation on social media.

Janet Steele

Professor of Media and Public Affairs and International Affairs, George Washington University

¹¹⁷ <https://rsf.org/en/news/jail-sentence-indonesian-reporter-who-covered-corruption-o>

¹¹⁸ <https://www.article19.org/wp-content/uploads/2021/09/Legal-Analysis-Indonesia-Ministerial-Regulation-5.pdf>

¹¹⁹ <https://www.vice.com/en/article/3abb39/mount-semeru-eruption-indonesia-tiktok>

¹²⁰ <https://www.thejakartapost.com/academia/2021/06/02/commentary-bigger-threat-than-ite-law-political-buzzers-crowding-our-cyberspace.html>

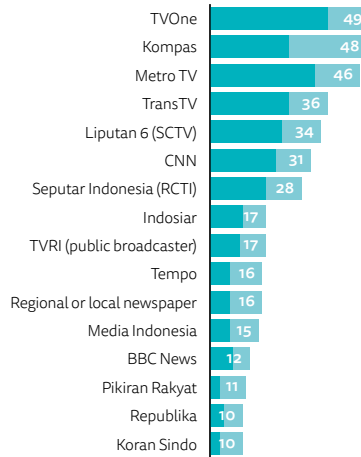
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

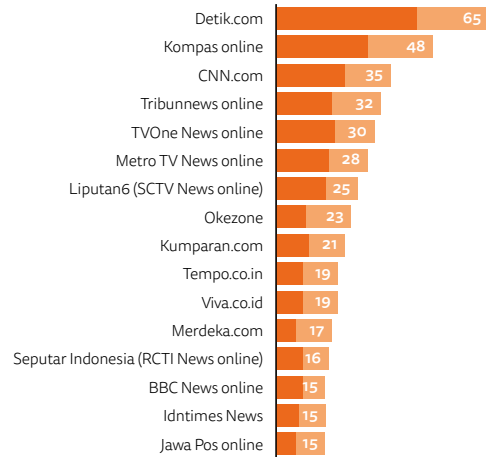
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE



CHANGING MEDIA

Online and social media remain the most popular sources of news in Indonesia with our more urban sample, but TV and radio remain important for the millions of people who are not online. The majority of internet news access is via smartphones (83%).



SOURCES OF NEWS



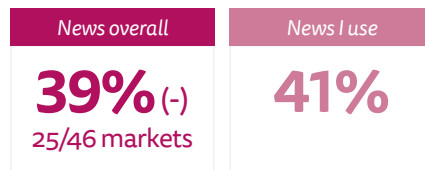
DEVICES FOR NEWS



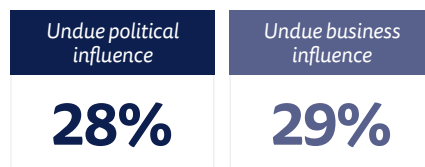
TRUST

Overall trust in news remains low at 39%. CNN continues to garner the most trust at 66%, followed closely by Kompas (65%). TVOne, which ranks as one of the top two news brands, is at the same time distrusted by a large percentage of respondents (16%), something that might be attributed in part to its sensational style of reporting.

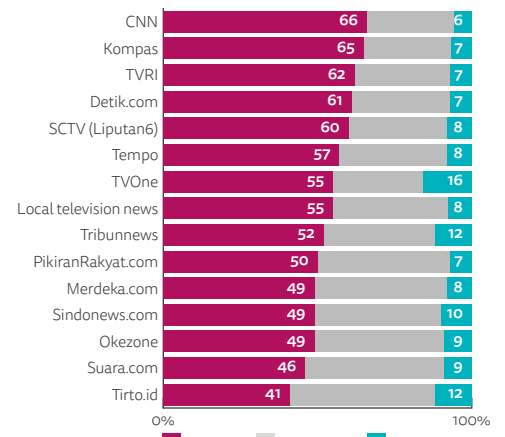
OVERALL TRUST SCORES



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	WhatsApp	54% (-6)	84%	4	Instagram	37% (-1)	64%
2	YouTube	46% (-)	77%	5	Twitter	20% (-2)	33%
3	Facebook	44% (+2)	65%	6	TikTok	16% (+5)	32%

JAPAN

News consumption in Japan is characterised by high-circulation print newspapers and five nationwide TV networks, including the public broadcaster NHK. The continued strength of traditional media has reduced the urgency of digital transformation but the pandemic has accelerated change.

Japan's once enormous circulation of print dailies shrank further last year. Data from the Japan Newspaper Publishers and Editors Association show total circulation at 33m or 0.57 copies per household, down by 6% from the previous year and by 38% from 2011.¹²¹ During the same period, the number of newspaper reporters declined by 16% to 17,148. Gender balance and diversity remain a significant industry problem, with newsrooms still dominated by men (76% male/24% female).

Some of the largest Japanese media companies continue to pursue radically different digital strategies. Nikkei, which also owns the *Financial Times*, has been focusing on building online subscriptions for its *Japan Economic Daily*, reaching 797,362 paid subscribers – up 4.9% in a year.¹²² By contrast, the largest publisher, the *Yomiuri Shimbun* newspaper, still refuses to offer an online-only subscription, to defend its 7.4m circulation from cannibalisation. They do, however, provide a limited amount of free content online, in part to attract new subscribers. The *Asahi Shimbun* newspaper, another digital pioneer, operates a subscription model for its national daily, but separately operates more than 20 advertising-supported verticals covering lifestyle subjects such as college sports and pets. Finally, the *Mainichi Shimbun* newspaper attracts digital audiences with long-format analysis by academics and experts, in a section named 'Premiere' published exclusively online. Local newspapers have also been accelerating digital subscription strategies, following a galvanising 'Innovation Report' by *Shizuoka Shimbun* in 2020.

Efforts to monetise online content in Japan have been hampered by the popularity of free sites such as Yahoo! News, SmartNews, and Gunosy that aggregate online content from multiple publishers.

Newspaper reporters are increasingly turning to audio and video channels to engage audiences, explain news, and share behind-the-scenes stories. *Asahi's* former international correspondent Daisuke Kanda has become a host at Asahi Podcasts (or Asa-Poki), including a series with news-related raps by hip-hop singers, named Journa-Rhythm. *Mainichi's* political correspondent Kenta Miyahara has been developing a YouTube channel with 5,000 subscribers, providing analysis and live conversations. Our *Digital News Report* data show that YouTube remains by far the most popular social network for news, used by around one in five of our sample (22%), ahead of Twitter (18%) and Line (16%). The growing trend towards consuming video-based news online partly prompted three national dailies, *Asahi Shimbun*, *Mainichi Shimbun*, and *Sankei Shimbun*, to launch NewsVideo, a joint website and app to showcase video clips produced by their journalists. Three local newspapers later joined the service.

Television viewing in Japan strengthened through the second year of the pandemic, as the government introduced a series of emergency measures – not least during the Tokyo Olympics. Government data show live television viewing, which started to decline in 2017, bouncing back strongly.¹²³ But as elsewhere, the popularity of on-demand streaming and catch-up services is disrupting traditional models. TVer, an on-demand service set up by five commercial



Population	126m
Internet penetration	95%

broadcasters in 2015, partly to compete with streamers like Netflix, saw its monthly viewing figures double in a year, surpassing 200m in October 2021.

However, the biggest winner was the internet, with users spending an average of 168.4 minutes on weekdays,¹²⁴ overtaking TV real-time viewing for the first time. Internet advertising has also eclipsed the combined total for TV, print, and radio.¹²⁵ The impact of these changes is shown in commercial broadcasters' operating income, which plunged by 11.3% in 2020, and is yet to return to pre-COVID levels.

As the Japanese spend more time online, there have been urgent calls to address the impact of cyberbullying and harmful content. In October 2021, Yahoo! News, Japan's largest news site, introduced a feature that uses artificial intelligence (AI) to automatically remove comments from its news site if the algorithm judged them to be harmful or defamatory. These moves came as the government toughened penalties for insults to deter online libel and cyberbullying, leading some academics and NGOs to voice concern that this may lead to censorship.

Yasuomi Sawa

Journalist and Professor at the Department of Journalism, Senshu University

Reiko Saisho

NHK, Broadcasting Culture Research Institute

¹²¹ The Japan Newspaper Publishers and Editors Association, *Circulation and Households*. <https://www.pressnet.or.jp/english/data/circulation/circulation01.php>

¹²² Number of digital subscribers as of December 2021. Total of digital and print = 2,611,735. More at <https://www.nikkei.com/topic/20220117.html>

¹²³ Ministry of Internal Affairs and Communications, *Survey Report on Usage Time of Information and Communications Media and Information Behavior*. https://www.soumu.go.jp/main_content/000765135.pdf

¹²⁴ Ibid. The survey on internet usage includes time spent on reading emails, accessing social media and watching video.

¹²⁵ Dentsu, *2021 Advertising Expenditures in Japan*. <https://dentsu-ho.com/articles/8090>

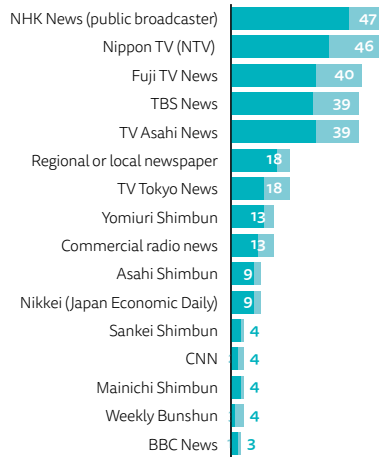
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

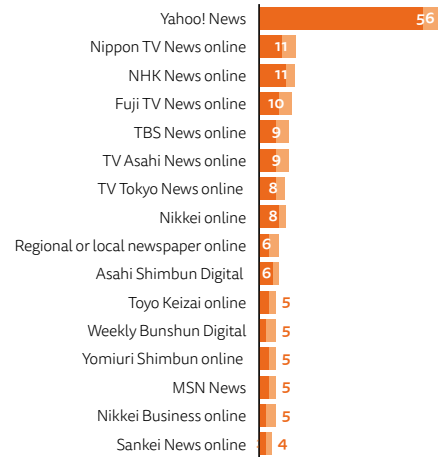
% Weekly usage

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- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

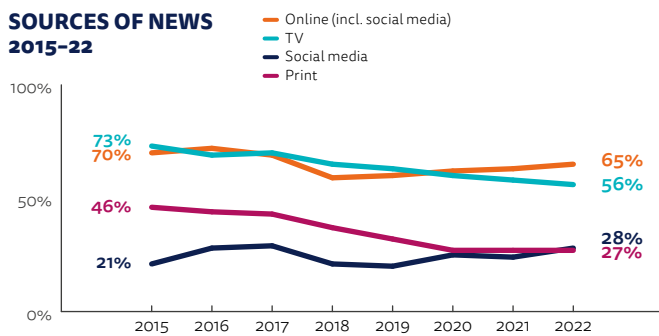


CHANGING MEDIA

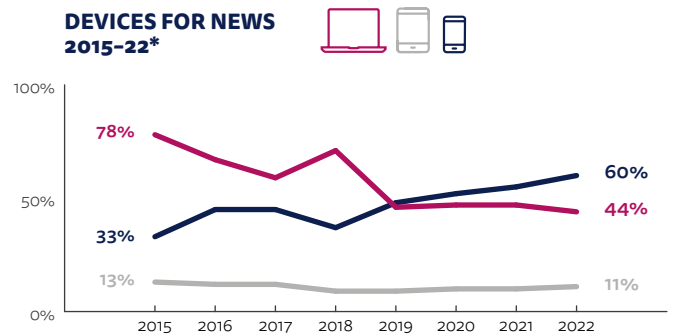
Online and social media news consumption together have overtaken television in the last few years, putting pressure on traditional models. The smartphone is now the dominant way of accessing news in Japan, with the COVID-19 pandemic appearing to accelerate the rate of change.



SOURCES OF NEWS 2015-22



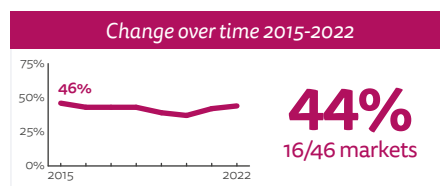
DEVICES FOR NEWS 2015-22*



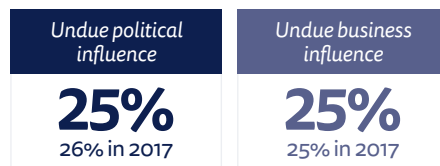
TRUST

Overall trust in the news (44%) has risen by seven percentage points in the last two years, perhaps reflecting the important role the media have played during the pandemic. Public broadcaster NHK remains the most trusted news brand, followed by Nikkei and the other big commercial broadcasters and then the national dailies. Weekly magazines such as *Weekly Shincho* and *Weekly Bunshun* tend to be less trusted.

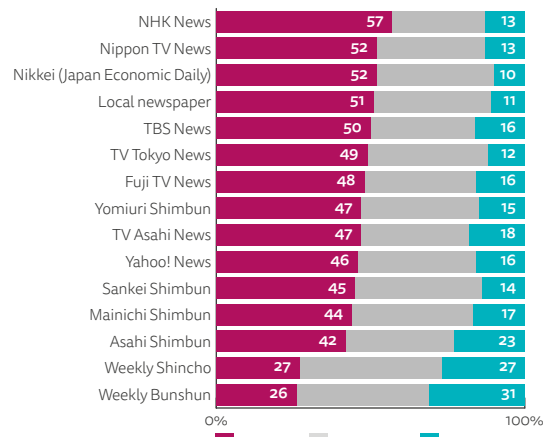
OVERALL TRUST SCORE



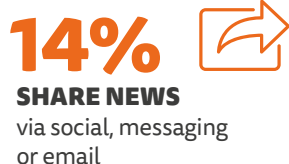
MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	YouTube	22% (-2)	60%	4	Facebook	5% (-1)	19%
2	Twitter	18% (+2)	34%	5	Instagram	4% (-)	25%
3	Line	16% (-2)	41%	6	Niconico	2% (-)	9%

MALAYSIA

Consumption of digital media and digital news has continued to rise over the past year, coupled with increasing scepticism over official explanations, especially over the pandemic. Aggressive attempts at consolidating control over the online news media also continued.

Two years after experiencing numerous lockdowns following the worldwide COVID-19 pandemic, alongside the political turmoil brought about by the collapse of the duly elected Pakatan Harapan (PH) coalition government in February 2020, Malaysia – together with its major institutions, including its media – is still going through an extended period of upheaval. The country has had three prime ministers over two years, only one being a result of a positive choice from the ballot box. With another general election due by mid-2023, it is likely that the uncertainty will continue.

The initial support and positive reports by the media of government handling of the pandemic changed quite substantially as the numbers of deaths rose and political expediency became evident. On social media, critiques of government efforts were supplemented by the increasing push for alternative treatment and medicines, even by registered doctors. Much of this was never reported in the print and broadcast media and even the online news portals. As social media narratives gathered momentum, the health authorities countered with reports of international studies proving the success and safety of vaccines and the questionable results of alternatives, like the heavily promoted Ivermectin.

Just as the country overall has been gingerly moving ahead over the past year, so have the news media, both digital and non-digital. This is reflected in this year's Digital News Report survey and our own research conducted over a nine-month period in 2021 on the state of the Malaysian media.¹²⁶ In the digital news environment, while independent portal, Malaysiakini, was still going strong, there have been moves in this period by the old political actors and elites to move into this

environment through attempted (and partly successful) buy-up of online news portals, most notably The Malaysian Insight.

This activity was largely spearheaded by the five major Malaysian media companies – Media Prima, Utusan Melayu, Star Media Group, Astro, and Media Chinese International Limited – all of whom reflect the continuing politics-media nexus in Malaysia. It is a connection that expanded from the 1980s onwards, with the emergence and growth of government-linked companies (GLCs) and government-linked investment companies (GLICs).¹²⁷ And these five are aligned to the political parties that have been in power for decades, the 2018–20 period notwithstanding.

Economically, the year has seen a further consolidation of media ownership and the apparent trimming down of brands and outlets. Media Prima, which has a large variety of media platforms in its stable, ceased printing *The Malaysian Reserve*, a limited circulation newspaper that was started up in 2007. In announcing its closure, managing director Mohamad Azlan Jaafar was highly critical of Malaysian corporations for spending the bulk of their advertising budgets on US-based social media and search companies: 'They are more supportive of these tech giants than local legitimate media organisations which have contributed to their business' success.'¹²⁸

The nationwide Emergency that was declared from January until August last year saw the temporary halt to parliamentary and state assembly sittings, and the introduction of ordinances detailing the laws regarding 'fake news'. Despite the ending of the Emergency, comments and reports on various digital platforms



Population	33m
Internet penetration	89%

(Facebook, Twitter, Instagram) continue to be monitored and punished by the authorities using earlier legislation such as the Communications and Multimedia Act 1998 and the Sedition Act 1948 (amended 2015). Apart from the ongoing police probes into the postings of satirist Fahmi Reza, throughout April 2022 Uthaya Sankar, a writer, and Dr Michael Jeyakumar, the head of the Socialist Party of Malaysia (PSM), were detained by the police for their social media posts.

Sponsored content and government advertising in digital media have also increased during this period, the latter largely because of the pandemic. This trend, however, has caused self-censorship in newsrooms as practitioners do not want to offend government advertisers and risk the loss of advertising revenue.¹²⁹

Podcasting has become a staple among digital radio and television stations. Popular city-based business radio station, BFM, has become one of the major movers of podcasting, certainly over the past year.

Zaharom Nain

University of Nottingham in Malaysia

¹²⁶ Zaharom Nain et al., 'Rising from the Ashes? Malaysia's Media Coming out of a Pandemic', MARI Project MAL1444 Final Report (October 2021, unpublished).

¹²⁷ Ibid., 7–8.

¹²⁸ 'The Malaysian Reserve to Cease Print Publication'. *The New Straits Times*, 22 April 2022.

¹²⁹ Nain et al., 'Rising from the Ashes?', 74.

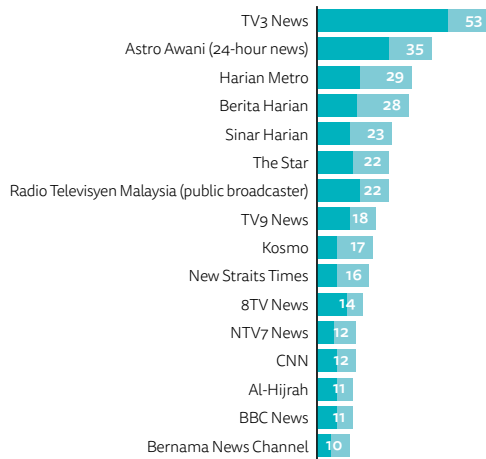
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

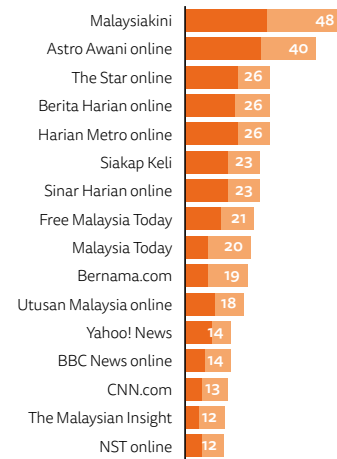
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

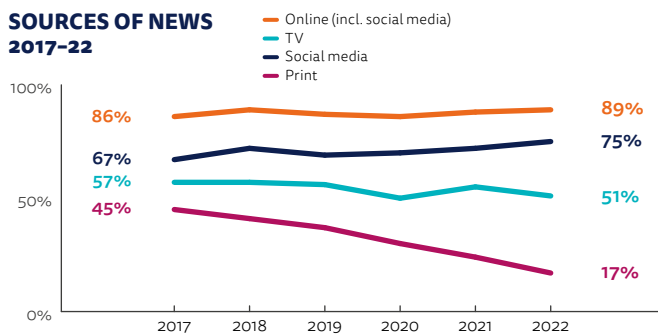


CHANGING MEDIA

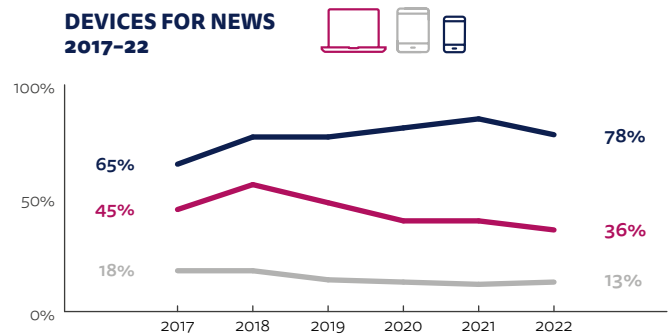
Online news and social media remain the main sources of news in Malaysia. Print continues its downward spiral (from 45% in 2017 to 17% this year). Access using smartphones surprisingly dropped seven percentage points over the year, down to 78%.



SOURCES OF NEWS 2017-22



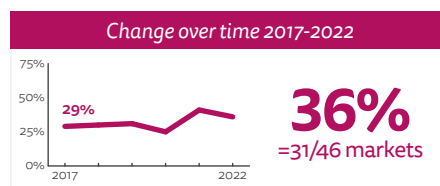
DEVICES FOR NEWS 2017-22



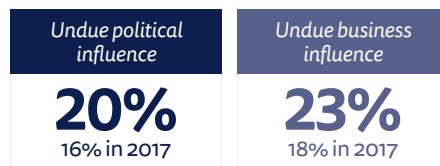
TRUST

National-language and vernacular newspapers have long been recognised as often being politically owned and aligned. Digitalisation has resulted in their dominant position being challenged. Formerly proud newspapers now languish at the bottom of the trust list. Astro Awani and Malaysiakini remain at the top largely because of the balanced yet critical approach of the former and the independence of the latter.

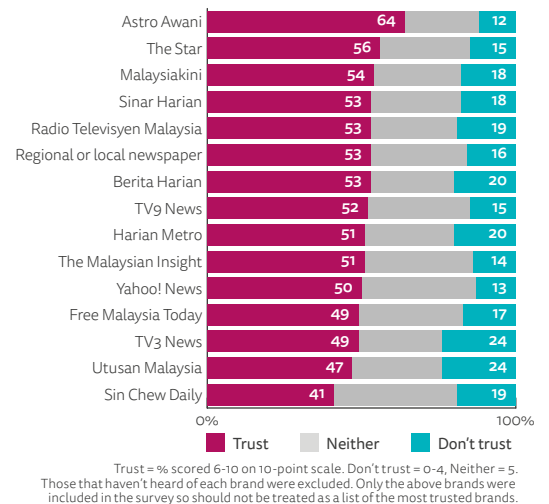
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	52% (-4)	72%	4	Instagram	24% (+2)	50%
2	WhatsApp	47% (-7)	79%	5	Twitter	22% (+6)	33%
3	YouTube	39% (+3)	75%	6	Telegram	19% (-1)	45%

PHILIPPINES

The loosening of pandemic restrictions in March followed by a hard-fought presidential election campaign have further helped news organisations recoup advertising and other revenues lost during the prolonged lockdown. But concerns over press freedom have grown as incoming president Ferdinand Marcos Jr., the namesake and son of the late dictator, held professional journalists in low regard throughout his campaign.

Political advertisements started making their presence felt, especially on television, by the third quarter of 2021 ahead of the 8 October deadline for declarations of candidacy. They further picked up in early 2022 as the national and local campaigns got into full swing.

Across the whole population, television remains the most popular medium in the Philippines, but this year's *Digital News Report* confirmed a steady growth of online news consumption including heavy news use on a range of social platforms. Facebook remains the most widely used (73% for news weekly) but the biggest leap comes from TikTok, used by mere 2% for news in 2020 and now by 15%. News organisations correspondingly moved into the platform, especially in time for the elections. Besides being the largest radio and television network, GMA Network is now the country's largest news creator on TikTok, which it also partnered with for an election campaign series. Other brands that have attracted a loyal following are ABS-CBN, News5, *The Philippine Star*, *Manila Bulletin*, DZRH, and Rappler.

With the country awash with disinformation in the lead-up to the elections, media combined forces with academia and civil society to fact-check untruthful election narratives that mostly lionised Marcos and demonised his rival, Vice President Leni Robredo. Two fact-checking collaboratives took the lead: TsekPH, formed during the 2019 midterm elections and relaunched with 34 partners, and FactsFirstPH, a new initiative with 18 fact-checking partners.

However, journalists and fact-checkers alike continue to come under attack, a grim reality further highlighted when Rappler CEO Maria Ressa, who faces at least seven lawsuits, was conferred the Nobel Peace Prize for

Journalism in December 2021. Ahead of the elections, Marcos barred professional journalists from covering his campaign events, snubbed media-hosted debates, and gave preferential treatment to friendly social media influencers and a partisan TV station that repeatedly lambasted mainstream media. Journalists and fact-checkers have been vilified not only by online trolls but also by public officials. A presidential communications official in February warned the government's anticommunist task force intended to take legal action against Rappler for allegedly spreading disinformation, as well as against Facebook for allowing Rappler and Vera Files 'to abuse the immense powers' of their designation as the platform's third-party fact-checkers.¹³⁰

Big and small news organisations were targets of what seemed to be coordinated distributed denial-of-service (DDoS) attacks that crippled their websites for hours, even days. Apart from Rappler and Vera Files, ABS-CBN, GMA News, CNN Philippines, Interaksyon, PressOnePH, and *Mindanao GoldStar Daily* were attacked; so were alternative news sites Bulatlat and Pinoy Media Center. Months earlier, the attacks against Bulatlat and another alternative site were traced to an IP address assigned to the Philippine Army.¹³¹ The country's ranking in the World Press Freedom Index slipped further, by nine spots to 147th out of 180 countries.

Investments by media houses have been channelled mainly to growing their digital presence as Filipinos increasingly turn online for news. ABS-CBN Corp., for example, in January raised nearly US\$10m from the sale of its shares and depositary receipts to fund digital initiatives and content production.



Population	111m
Internet penetration	82%

These have kept the network afloat since mid-2020 when its free-to-air radio and TV stations closed after Congress refused to renew its franchise.

ABS-CBN's move preceded the government's decision to assign its highly coveted frequencies to three companies, two of them owned by allies of Ferdinand Marcos Jr. and outgoing President Rodrigo Duterte. Swara Sug Media Corp., owned by Duterte's spiritual adviser Apollo Quiboloy, who is wanted in the United States for sex trafficking,¹³² received the frequency formerly used for ABS-CBN's digital terrestrial television. The network's two other frequencies, including Channel 2, were awarded to Advanced Media Broadcasting System bought only in 2021 by Manuel Villar, former Senate president and the country's richest man.

While most online news sites still rely on advertising, revenue from paid online e-papers grew by 25% in 2021, outperforming those from Thailand, Indonesia, Singapore, and Malaysia.¹³³ Revenue growth of e-magazines reached 19.5%. Around 70 titles, including leading newspapers, rely largely on PressReader to distribute their digital versions. The *Philippine Daily Inquirer* also sells digital subscriptions through the online shopping platform Lazada. Besides its basic plan, *Inquirer* is bundled with a choice of any of 10 local papers it has partnered with, or with 30 other publications, including *Jakarta Post* of Indonesia and *The Star* of Malaysia.

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University of the Philippines

¹³⁰ <https://www.facebook.com/lorraine.badoy/posts/10159683907769834>

¹³¹ <https://interaksyon.philstar.com/trends-spotlights/2021/09/23/200795/dict-unit-findings-bare-cyberattacks-vs-alternative-media-outlets-traced-to-philippine-army/>

¹³² <https://www.fbi.gov/wanted/human-trafficking/apollo-carreon-quiboloy>

¹³³ <https://www.statista.com/outlook/dmo/digital-media/epublishing/philippines>

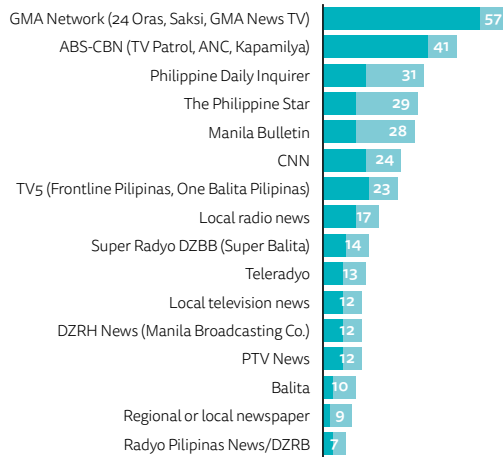
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

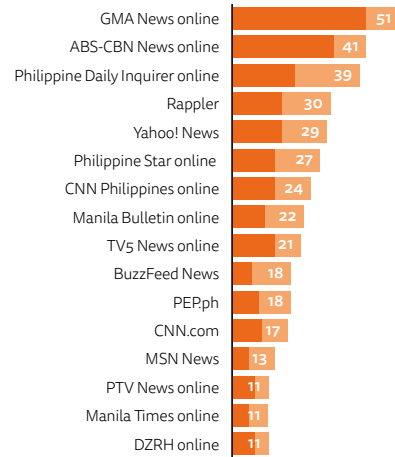
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE



CHANGING MEDIA

Television news' reach continued its decline, from 66% in 2020 to 60% this year. The shift to social media and online sites of traditional media continues while the use of smartphones to access news has reached 80% of our sample.



SOURCES OF NEWS



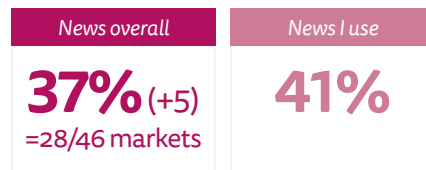
DEVICES FOR NEWS



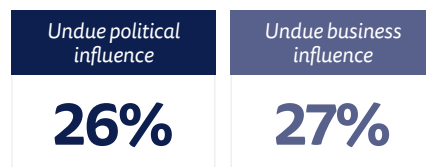
TRUST

Overall trust in news rose as Filipinos turned to media amid a surge of COVID-19 cases around the time the survey was conducted. However, trust in brands slid, with the exception of DZBB, Teleradyo, Rappler, and the tabloid *Abante*. Independent outlets respected for their reporting on those in positions of power are often actively distrusted by supporters of the politicians in question.

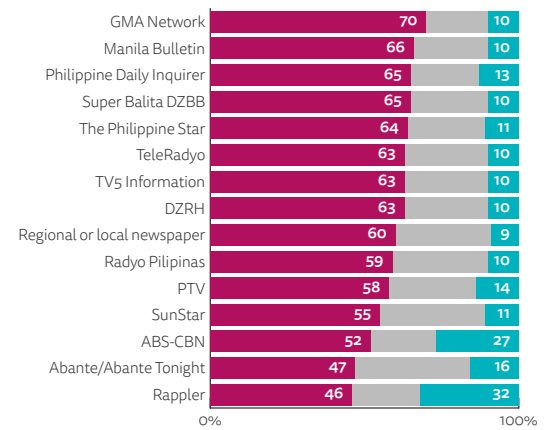
OVERALL TRUST SCORES



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	73% (-)	84%
2	YouTube	57% (+4)	81%
3	Facebook Messenger	35% (-1)	68%

Rank	Brand	For News	For All
4	Twitter	16% (-3)	27%
5	TikTok	15% (+9)	33%
6	Instagram	15% (+3)	37%

SINGAPORE

Singapore's online news landscape is changing, with messaging app Telegram and video sharing platform YouTube becoming major sources of news for an increasing number of users, as trust in the news slightly decreases after peaking in 2021.

Trust in the news in Singapore (43%) slightly dipped this year, although it remains higher than levels seen prior to the pandemic. Mainstream news outlets remain the most trusted, but while their traditional and online platforms remain widely used in the city-state, they face a growing challenge from digital-native media.

The Straits Times, Singapore's newspaper of record, remains the most popular traditional news brand, used weekly by 37%. It also has a strong presence online, with its website ranking third in terms of frequency of use. *The Straits Times* is owned by the SPH Media Trust (SMT), which publishes most of Singapore's local newspapers, including Chinese-language *Lianhe Zaobao*, Malay-language *Berita Harian*, and Tamil-language *Tamil Murasu*. These newspapers used to be owned by Singapore Press Holdings (SPH), but in May 2021, SPH announced that it would transition its media business into a not-for-profit company.¹³⁴ In December 2021, SMT was established as a not-for-profit entity. This comes after SPH recorded in 2020 its first-ever financial loss and many see the restructuring as paving the way for other revenue streams, such as private donations and government support in the face of shrinking advertising revenues; for others, this may mean stronger government influence on the press in Singapore.¹³⁵

The government, through its investment company Temasek Holdings, also owns Mediacorp, which operates all the local television stations and most radio stations in Singapore. Mediacorp operates the popular 24-hour news network Channel News Asia (36%), the most trusted news brand in Singapore and whose website is

also one of the most frequently used online news source. Mediacorp operates free to air channels catering to each of the linguistic groups in the country, such as the Chinese-language Channel 8 (used weekly by 29%) and the English-language Channel 5 (25%).

Singapore has an extensive regulatory system that covers offline and online news platforms on the island. The Newspaper and Printing Presses Act governs the licensing of newspaper companies while the Broadcasting Act regulates the licensing of broadcasting services as well as internet content providers, including online news sites. Since 2013, the government has required individual licensing for online news sites that publish regular articles on Singapore news and current affairs and have large numbers of monthly visitors.¹³⁶

It is in the online space where the news media in Singapore seem to be evolving, as media start-up Mothership.sg, which started operating only in 2014, has now become one of the most frequently used news websites (used weekly by 46%), sharing the top spot with Channel News Asia's website. Mothership.sg is known for its bite-sized articles, many of which are sourced from viral social media posts. It has since amassed a large following and been recognised as a registered news media outlet in Singapore, although the government suspended its press accreditation in February this year after it prematurely published on Facebook an infographic related to the 2022 budget before the official announcement.¹³⁷ During the temporary suspension, to last until August 2022, Mothership.sg would be unable to attend government press briefings.¹³⁸



Population	5.9m
Internet penetration	88%

While it has risen to become among the most frequently used news sites in Singapore, Mothership.sg (53%) still ranks significantly lower in brand trust than the more established brands from SPH and Mediacorp, which have been operating for much longer.

In 2021 there was a slight decrease in the number of news outlets: SPH merged its Chinese-language afternoon newspaper *Lianhe Wanbao* with its other Chinese-language afternoon newspaper *Shin Min Daily News* in December 2021.¹³⁹ Alternative media site The Online Citizen also took down its website and social media pages in September 2021 after the government suspended its class licence for refusing to declare its funding sources.¹⁴⁰

On the social media front, news consumption patterns seem to be changing, with those saying they use WhatsApp (39%) and Facebook (39%) for news largely stable, while those who use Telegram (18%) and Instagram (17%) for news are increasing. Telegram is particularly noteworthy, as it is becoming popular in Singapore but is now confronted by the spread of 'fake news' via chatgroups that attract thousands of followers.¹⁴¹

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¹³⁴ <https://www.straitstimes.com/singapore/sph-to-restructure-media-business-into-not-for-profit-entity>

¹³⁵ <https://mothership.sg/2021/05/sph-restructuring-clg-explainer/>

¹³⁶ <https://www.gov.sg/factually/content/what-is-the-licensing-framework-for-online-news-sites-all-about>

¹³⁷ <https://mothership.sg/2022/03/mothership-press-accreditation-suspension/>

¹³⁸ <https://mothership.sg/2022/02/mothership-press-accreditation/>

¹³⁹ <https://mothership.sg/2021/09/lianhe-wanbao-shin-min-daily-news-merge/>

¹⁴⁰ <https://www.todayonline.com/singapore/online-citizen-complies-imda-directive-taking-down-website-social-media-pages>

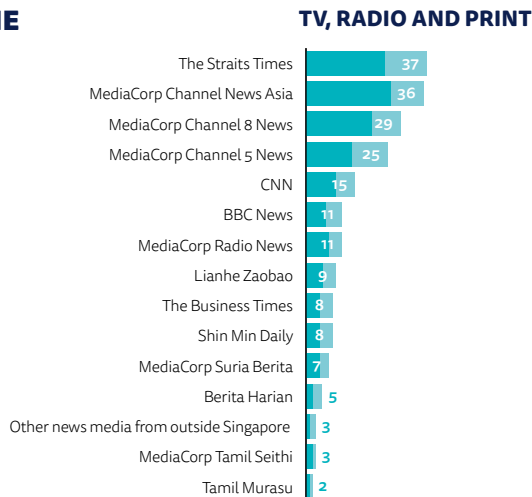
¹⁴¹ <https://www.straitstimes.com/tech/st-explains-telegram-popularity-perils-and-precautions>

WEEKLY REACH OFFLINE AND ONLINE

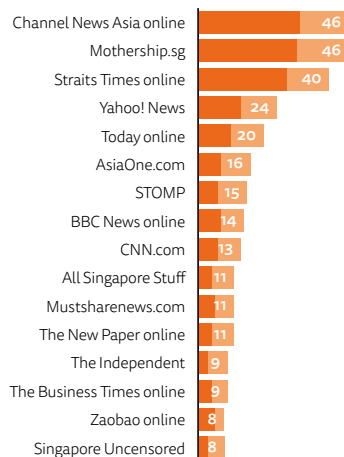
TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



ONLINE



CHANGING MEDIA

Singaporeans still get their news primarily from online sources including heavy use of a wide range of different social networks and messaging apps. TV news consumption remains relatively stable while weekly print consumption is now half the level (23%) it was in 2017.

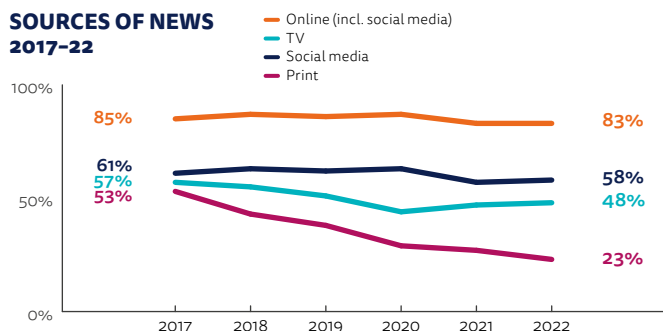
17% pay for **ONLINE NEWS**



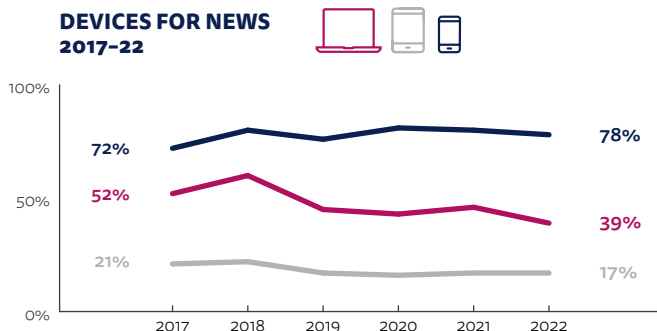
33% listen to **PODCASTS** in the last month



SOURCES OF NEWS 2017-22



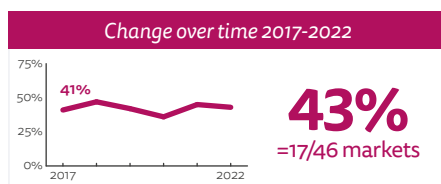
DEVICES FOR NEWS 2017-22



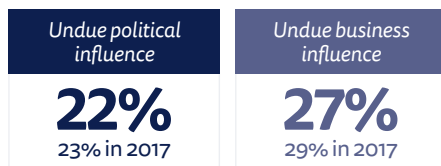
TRUST

Trust in the news in Singapore dipped slightly this year to 43%, after COVID-inspired increases in 2021. MediCorp's round-the-clock news network Channel News Asia (CNA) remains the most trusted traditional news brand, followed by MediCorp's free TV English channel and the newspaper *The Straits Times*.

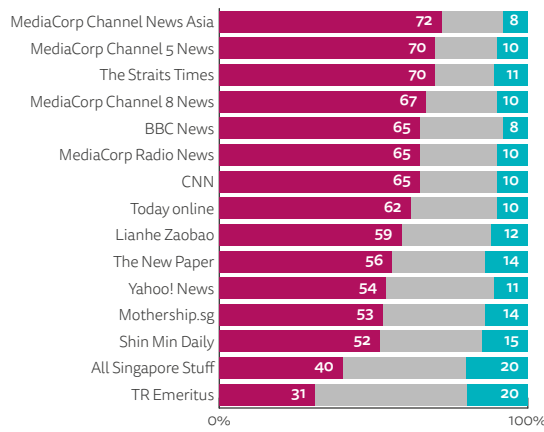
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

40%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	WhatsApp	39% (-1)	83%	4	Telegram	18% (+4)	42%
2	Facebook	39% (-1)	67%	5	Instagram	17% (+4)	49%
3	YouTube	28% (+3)	74%	6	Twitter	7% (-)	18%

SOUTH KOREA

The media environment in South Korea is characterised by strong broadcasters, a newspaper sector struggling to adapt to digital change, along with powerful Korean-owned online portals, social networks, and messaging apps. Some news organisations have started to introduce digital subscriptions in the last year but worry about the dominant role of platforms and their algorithms.

The COVID-19 pandemic has accelerated concerns about sustainability of domestic news outlets. In a survey by the Korea Press Foundation conducted from July to August 2021, nine out of ten media companies (91%) responded that their business troubles were at a critical level.¹⁴² Total advertising expenditure for print media tumbled by 19 percentage points (pp) in 2020 and has been largely flat ever since, in contrast to TV and digital media, both of which fared relatively well.¹⁴³ Print and digital advertising accounts for 64% of the total revenue of newspaper companies,¹⁴⁴ and the government has injected emergency public funds into the embattled small and regional media for two years in a row – \$8.2 million in 2020 and \$5.8 million in 2021.

Media firms continue to experiment with new business models including subscription. Two major dailies, *Chosun Ilbo* and *JoongAng Ilbo*, introduced online registration in May and August 2021, respectively, an initial step towards a paywall. They offered exclusive content available only for logged-in readers and held promotional events with prizes to entice more online subscribers. *Hankyoreh*, a newspaper that has maintained a public ownership system based on individual shareholders for more than 30 years, introduced a membership model in May 2021. Although such attempts are yet to produce tangible results, media firms know they need to find new sources of funding quickly beyond advertising.

One notable trend is a renewed focus on email newsletters as a way to better communicate with readers and drive more frequent usage. In the past three years, several media outlets, including *Chosun Ilbo*, *JoongAng Ilbo*, *Maeil Business*

Newspaper, and SBS, either launched or overhauled their newsletter services, mainly targeting younger readers. This has been partly inspired by the email-driven success of local start-ups UPPITY and NEWNEEK. The latter attracted more than 400,000 subscribers. Meanwhile, *Chosun Ilbo* kicked off a paid newsletter service named Startup in March 2021. Even so, *Digital News Report* data show that the proportion of respondents who have used paid online news services (14%) remains lower than the average of other countries.

Major online portals Naver and Daum (run by Kakao), which aggregate multiple news sources via their webpages and apps, dominate the online news market in South Korea. A majority (69%) say they prefer to access news via these aggregators or via search engines, compared to just 5% who say they prefer to start their news journey directly with a specific news site or app – the lowest figure in our international survey.

One important point of contention between platforms and Korean media has been the fairness and transparency of algorithms that decide which news sources and stories to display. Kakao announced it would be ending this algorithm-based news layout system as well as the similar ranking-based news service for Daum, but the dependence on the platforms for audience reach remains. This outside influence was further illustrated when a major news provider, Yonhap News, had its news articles suspended from both Naver and Daum in August 2021 – after a dispute over the use of advertorials – causing their traffic to plummet. The service was restored after a court ruling but relations between publishers and platforms remain tense.



Population	51m
Internet penetration	96%

Our survey this year coincided with the run-up to a closely fought presidential election. With rampant mudslinging and corruption charges over the candidates and their family members, media firms came under fire for concentrating on these allegations rather than election pledges and related policies. Amid deepening political polarisation, the use of social media has increased, with YouTube (44%) becoming a much more important source of news¹⁴⁵ as online users increasingly prefer to get information that matches their political allegiances. 3PRO TV, an economic YouTube channel, interviewed presidential candidates in a series that gained explosive popularity and positive reviews – providing voters with an opportunity to hear and compare the economic policies and ideas of major presidential contenders.

Jin-Ho Choi

Senior Researcher, Korea Press Foundation

¹⁴² Korea Press Foundation, *Survey of Media Industry to Help Overcome COVID-19 Crisis* (2021).

¹⁴³ Ministry of Science and ICT & Korea Broadcast Advertising Corporation, *Korea Advertising Expenditure Research* (2021). <https://www.kobaco.co.kr/site/adstat/file/download/uu/2e6dc98097d74d15868898a3eacff35>

¹⁴⁴ Korea Press Foundation, *Newspaper Industry in Korea 2021*. <https://www.kpf.or.kr/synap/skin/doc.html?fn=1648104585768.pdf&rs=/synap/result/research>

¹⁴⁵ YouTube news use has grown from 16% in 2016, to 38% in 2019, and 44% in 2022, *Digital News Report*.

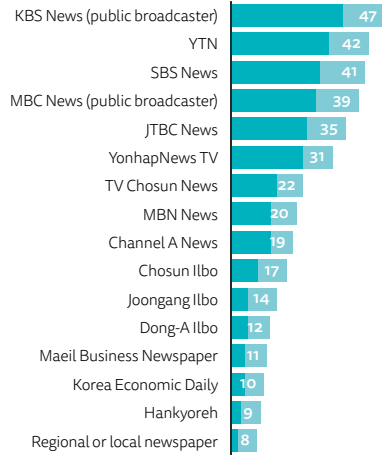
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

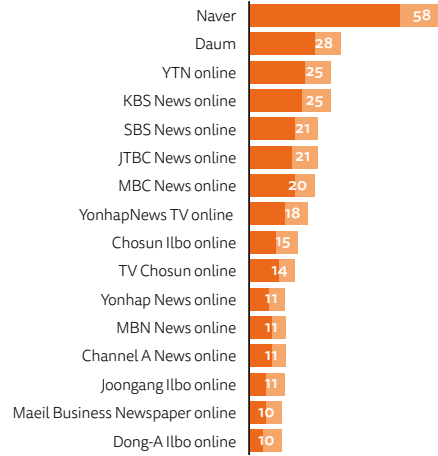
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

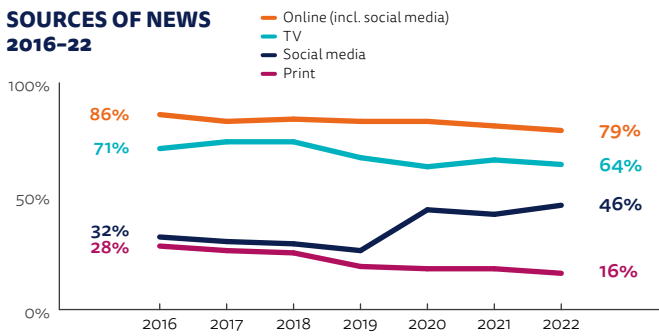


CHANGING MEDIA

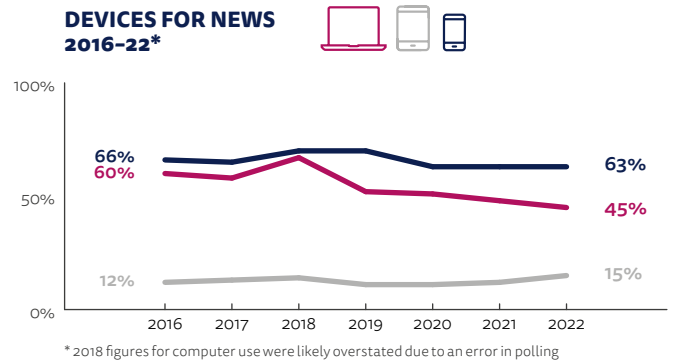
South Korea's 2022 presidential election was held amid the continued spread of COVID-19. During the period, news consumption via social media went up (+4pp), while the figure for TV and print media both went down.



SOURCES OF NEWS 2016-22



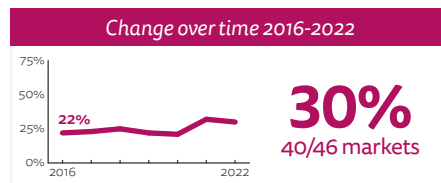
DEVICES FOR NEWS 2016-22*



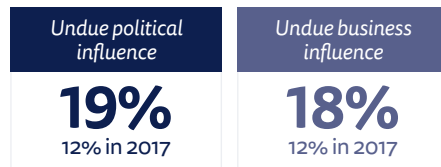
TRUST

Trust in the news in general edged down (-2pp) in line with the average drop across the 46 surveyed markets. The most trusted media was YTN, a cable news channel, which has ranked first for two straight years. Trust in broadcasters is mostly higher than that of newspapers, but the relatively high levels of distrust for specific news brands point to a media that is deeply politically polarised.

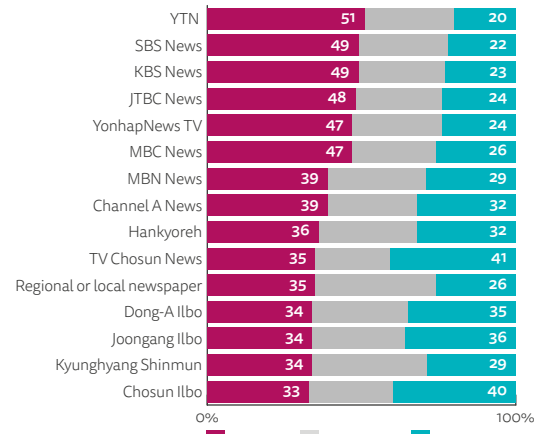
OVERALL TRUST SCORE



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All		
1	YouTube	44%	(-)	72%	4	Instagram	11%	(-)	39%
2	KakaoTalk	24%	(-3)	70%	5	Twitter	6%	(-1)	15%
3	Facebook	14%	(-2)	34%	6	KakaoStory	5%	(-)	18%

TAIWAN

The media environment in Taiwan is one of the freest and most competitive in Asia. Though mainland China continues to exert economic and political pressure on some outlets, Taiwan has been building up democratic defence mechanisms. Meanwhile, local news publishers are looking for government help in negotiations over money with global tech platforms.

Taiwan's deregulated media landscape is noted for high competition in cable TV news – there are currently 18 round-the-clock news channels, with more planned as tycoons seek greater political and economic influence. They are all privately owned and commercially operated with the exception of the public Chinese Television System (CTS) (offline use 17%).

The media remain vulnerable to Chinese influence. The owners and shareholders of some news channels, including TVBS (45%) and China TV News (23%), have business interests in China and adopt pro-Chinese Communist Party positions. Additionally, as cable TV advertising revenues have fallen (by 9.4% in 2020), there have been worries that some stations might receive subsidies from Beijing, especially during elections.

Claiming to safeguard Taiwan's democracy, the government has taken measures to combat these possible Chinese influences. In 2020, the legislature passed the Anti-Infiltration Act, which prohibited the spreading of disinformation which would interfere with elections at the instigation of, or with financial support from, hostile external forces. An application from Mirror Media for a licence for a new channel was approved with the condition that it must not accept direct or indirect instructions, investments, or sponsorships from any foreign influence.

While TV news is competitive, legacy newspapers in Taiwan had more trouble navigating the digital environment. Newspaper advertising revenues fell by up to half in 2020. Partly because of that, and partly because of pressures from China, *Apple Daily* ceased its print version in May 2022. With the exception of *United Daily Online* (18% weekly reach), most web versions of legacy newspapers are now free

to access. They are up against digital-native news sites such as ETtoday online (38%), which offer a free diet of infotainment on subjects such as pets, celebrities, and travel.

News aggregators such as Yahoo! are widely used, along with social media sites. Line (49%), Facebook (45%), and YouTube (40%) are the most widely used networks for news, meaning publishers have become dependent on these platforms to distribute their content. To protect their income, they have been urging the government to take action similar to laws recently passed in Australia, saying that it is not fair for Google and Facebook to receive more than 70% of digital advertising revenues without having to pay the media for content. While the publishers argued for financial compensation, media academics argue this would benefit mainly the bigger publishers who have more bargaining power. A tax model which would collect a levy from the platforms and which could be directed towards a fund for supporting public sector journalism would be more effective, they said, to strengthen democracy and public accountability.¹⁴⁶

In response, the Taiwan executive announced initiatives to make the platforms more accountable, including requiring them to produce regular transparency reports about content moderation, algorithmic curation, and their support for quality journalism. The draft of the Act will be published and open to public consultation this year.

Two business news magazines have made progress on trust this year (*CommonWealth* at 51% in 2021 and 57% in 2022, *Business Weekly* with 51% in 2021 and 56% in 2022). These magazines covered not only economics but also pressing social issues such as the cost of housing, the problem of



Population	24m
Internet penetration	92%

elderly care, and also international security. Both magazines have adopted digital-first strategies, with multimedia storytelling on subjects such as China's military operations near Taiwan. *CommonWealth* is becoming sustainable financially through subscriptions and high user engagement, and in August 2021, its founder Yun-Peng Yin put her majority shareholding into a trust which will reinvest its profits into the magazine.

Taiwan's major public broadcaster, the Public Television Service (PTS), the most trusted news brand in previous years in our survey, has fallen to fourth this year, despite still making award-winning content. Political disagreements have blocked its digital transformation, and a caretaker board of directors is not empowered to make the kind of bold innovations the service needs. A young graduate student influencer, who had seen PTS from the inside, used social media to publish observations about its inefficiency, bureaucracy, and low morale. His essays were read by nearly 96,000 readers.

Lihyun Lin
National Taiwan University

¹⁴⁶ <https://taipeitimes.com/News/taiwan/archives/2021/09/03/2003763729>

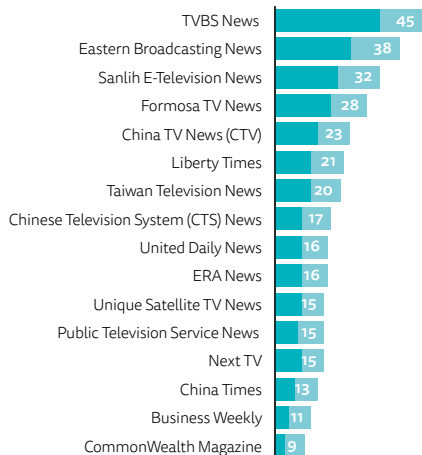
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

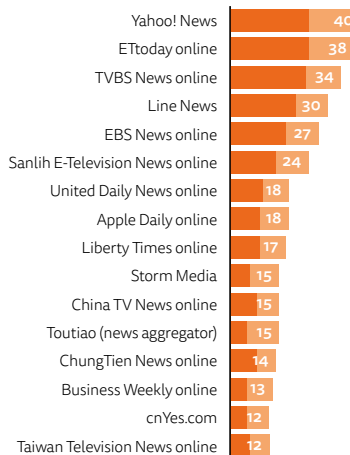
% Weekly usage

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- More than 3 days per week TV, radio & print
- Weekly use online brands
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TV, RADIO AND PRINT



ONLINE

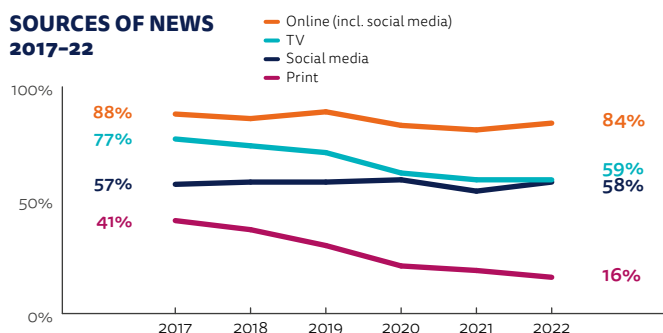


CHANGING MEDIA

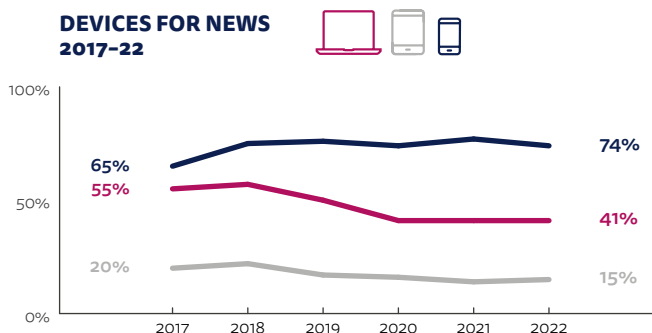
Traditional media sources such as television and print are becoming less important, while digital and social media have become more widely used. Aggregators Yahoo! News (40% weekly reach) and Line News (30%) are popular online via web portals and apps.



SOURCES OF NEWS 2017-22



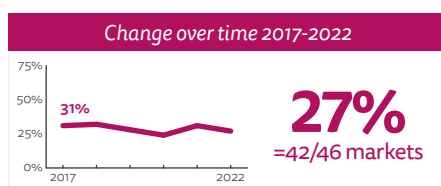
DEVICES FOR NEWS 2017-22



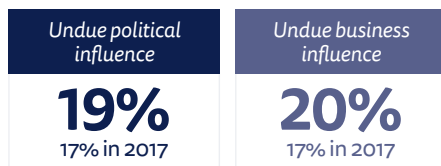
TRUST

Trust in news (27%) has fallen back after last year's COVID-19 boost, and remains amongst the lowest in our multi-market survey. In a deeply polarised media landscape, many brands are trusted by one group but distrusted by another. Notable exceptions are business publications *CommonWealth* and *Business Weekly*, which have increased their trust levels, bucking overall trends.

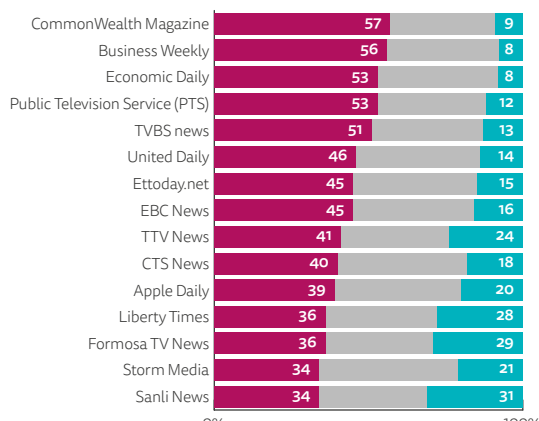
OVERALL TRUST SCORE



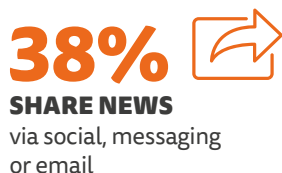
MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Line	49% (+2)	70%	4	Instagram	9% (+2)	31%
2	Facebook	45% (+4)	67%	5	PTT (bulletin board)	7% (-)	16%
3	YouTube	40% (+2)	69%	6	Facebook Messenger	6% (-1)	28%

THAILAND

The COVID-19 pandemic has acted as an accelerator of change for the Thai media industry. Social distancing and virtual events have been widely adopted and are now part of the 'new normal' for consumers. Meanwhile, the fragmentation of consumption is leading media companies to engage more deeply with social media and news aggregators.

Freedom of the press remains a key theme in Thai journalism with self-censorship still widely practised in traditional mainstream media. Student-led pro-democracy protests in 2020 and 2021 had helped open up media that have long been reluctant to criticise the authorities. This involved the development of an alternative media system that built substantial audiences via social platforms, with content that openly criticised both the government and the monarchy – something that was previously rarely heard in this strongly deferential country.¹⁴⁷ Despite this, the past year has been relatively quiet in terms of civil unrest, though upcoming local elections in Bangkok and across all parts of the country are expected to raise the political temperature online.

Our survey illustrates the continued importance of television for the mass of the Thai population, with news services of Channel 3 HD, Channel 7 HD, and Thai Rath TV 32 taking top spots. Radio remains a popular medium in Thailand with the new leader, the News Family Station 106.5. The auction of more than 70 FM radio frequencies in early March 2022 by the National Broadcasting and Telecommunications Commission (NBTC) will not only generate 500m baht for the government but also lead to new types of programming.

The print media, which are largely privately run, include a handful of Thai-language dailies, including *Thai Rath Daily*, *Khaosod*, *Daily News*, and *Matichon*. Two other daily publications, *Post Today* and *The Nation*, transitioned to online-only in 2019 to reduce costs and try to engage a wider audience. Newspapers do not charge subscriptions for online news in Thailand, relying instead on advertising income or from cross-subsidies from television if they are part of a bigger media brand.

The pressures on printed newspapers are reinforced by longstanding preferences to watch rather than read the news in general. Though reading news *online* remains majority behaviour, our survey this year shows that around almost a fifth (16%) of Thais prefer video over text. YouTube is a key channel for news programming, with over half of our sample (55%) saying they use it weekly for news.

Cheaper Android smartphones are widely used in Thailand and mobile portals that aggregate news from different providers have become a popular way to access news. Google News (39%), Line Today (31%), and Sanook.com (25%) are valued for convenience. Another feature of the market is the easy availability, via any smartphone, of free live TV channels via OTT providers AIS (AIS Play) and True (True ID), which further encourages watching of television news rather than text-based websites when on the move.

Thai journalism is often characterised by a sensationalist and negative tone. Stories that involve insults, death, lottery wins, or personal dramas such as villagers quarrelling, tend to attract bigger audiences. These are often spiced up with emojis and other visual accompaniments. News coverage about the death of a leading actress in suspicious circumstances recently went viral on social media, eclipsing more important stories like the pandemic and Russia-Ukraine war. Public participation in sensational news is more evident than in the past, with 'concerned citizens' often carrying out their own investigations online using techniques once only available to journalists. These social media investigators, dubbed 'Naksueb Social', have broken a number of stories which are often followed up by the mainstream media. High social media usage may also explain concern



Population	70m
Internet penetration	84%

(62%) about being able to distinguish between authentic and fake news on the internet, with topics like COVID-19, health, and politics most frequently mentioned, according to our survey.

TikTok has grown rapidly in the last year, with around four in ten (42%) using it for any purpose and almost a quarter (22%) for news – the highest of all 46 countries in the survey. Thais particularly embraced the platform during the COVID-19 lockdowns as a place to relax and have fun, but also because of its community features such as LIVE Event, GO LIVE Together, and LIVE Q&A. News on TikTok tends to focus on lighter, entertainment-based content, and is often not considered to be reliable. Meanwhile, podcasts and social audio apps like Clubhouse also became attractive platforms for older and better educated news consumers during the pandemic.

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Dhanaraj Kheokao
Potsdam University, Germany

¹⁴⁷ <https://reutersinstitute.politics.ox.ac.uk/risj-review/how-activists-and-digital-publishers-are-redefining-media-freedoms-thailand>

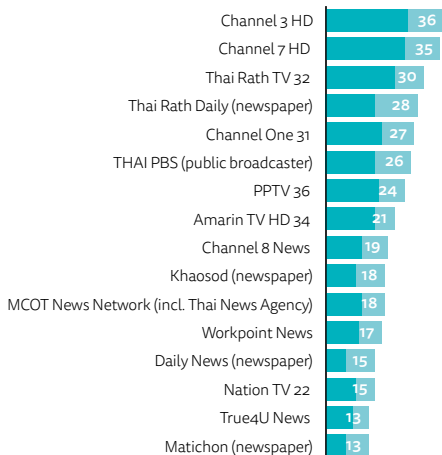
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

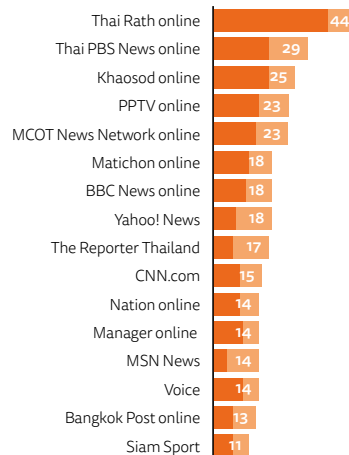
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TV, RADIO AND PRINT



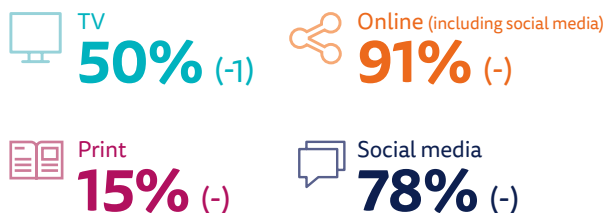
ONLINE



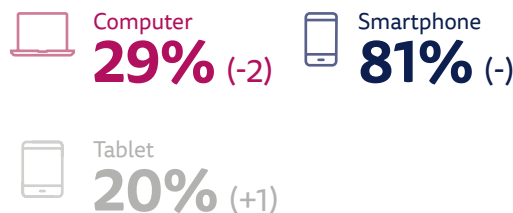
CHANGING MEDIA

Thais rely heavily on online and social media sources for news, and access content mainly or exclusively via the smartphone (81%). The most important social media platforms for news include Facebook, YouTube, and Line.

SOURCES OF NEWS



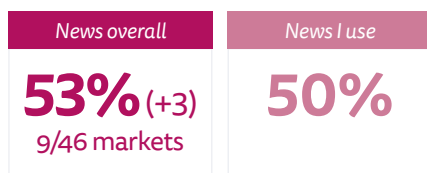
DEVICES FOR NEWS



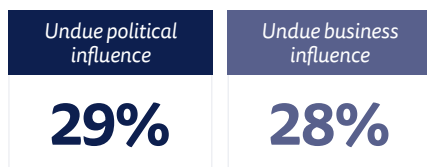
TRUST

Trust in the media (53%) has increased slightly compared with last year and ranks relatively highly by both regional and global standards. Trust in most mainstream media brands remains steady, with Thai PBS, Channel 7HD, and Thai Rath having highest levels of trust. *Nation* was the only brand to increase its level compared to last year after organisational changes and a shift in its editorial stance.

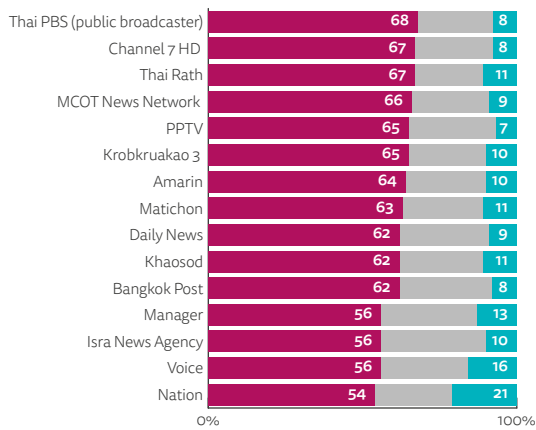
OVERALL TRUST SCORES



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

48%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	66% (-)	80%	4	Facebook Messenger	23% (-4)	48%
2	YouTube	55% (+2)	80%	5	TikTok	22% (+8)	42%
3	Line	51% (-5)	77%	6	Twitter	21% (-)	34%

3



SECTION 3

Analysis by Country and Market Africa

AFRICA

3.44	Kenya	154
3.45	Nigeria	156
3.46	South Africa	158



KENYA

The introduction of the digital tax in 2021 and enhanced measures to curb the spread of online hate speech as the country heads to an August election have impacted the media. The digital tax, charged on subscription-based media including news, magazines, and journals, is expected to double to 3% by July 2022, affecting media companies that have been looking to charge for online content to make up for falling advertising revenues.

The major print outlets – from the Nation and Standard groups – now operate daily or article-by-article paywalls for premium content and articles older than seven days, which are no longer considered ‘news’. Micropayments – many of them made through the ubiquitous Mpesa mobile payment platform – make it possible for people to pay for a daily pass when they can afford it. They can also pay for a monthly, six-monthly, or annual pass. The ease of payment has helped boost subscriptions and readership with the Nation, for example, increasing its paying online readership from 130,000 to almost 500,000. It is important to note that approximately 80% of subscribers buy the daily pass, which is heavily discounted and only costs KES10 shillings (£0.07 or \$0.09) so this is unlikely to replace advertising any time soon.

In recent years, many large media organisations have diversified their portfolios, introducing over the top (OTT) services like video streaming and podcasts and digital marketplaces. Many of these will now be affected by a 15% increase in tax for gambling, alcohol, and gaming advertising. Despite these challenges, media organisations have revoked pay cuts of between 30% and 50% initiated during the pandemic to manage costs and stay in business. Journalists’ salaries have been reinstated to their pre-pandemic levels even as newsrooms attempt to deliver more output and enhanced election coverage with the same number of staff.

Kenyan media are still considered to be relatively independent by regional standards, but press freedom has been deteriorating since 2017 when the government started using its advertising budgets to compel news organisations to toe the line. A culture of self-censorship,

brought about by the deteriorating media business combined with a regulatory environment that allows politicians to own and control media, blunts its autonomy. Such ownership, particularly of local-language television and radio stations owned by some of the major news groups allows the spread of propaganda and political divisions.

Facebook and WhatsApp are still among the most popular social media platforms. However, TikTok has been growing in popularity, especially during the COVID-19 lockdown when people would share funny or exciting updates or events in their neighbourhood. More politically nuanced content – some satirical but a lot of it mis- and disinformation – has been prevalent more and more ahead of the August elections. Tech-savvy youth (mainly urban) are more likely to engage on Telegram than on WhatsApp or Facebook, which are increasingly becoming the preserve of those over 35 years and the rural population.

Misinformation has continued to thrive as platforms fail to learn from past mistakes (2017 elections)¹⁴⁸ and are still unable or unwilling to commit to a roadmap on how they intend to address the problem in Kenya specifically and generally in the continent. Their algorithms for fighting hate speech and fact-checking content shared in Sheng, ‘Kenglish’ (Kenyan English), or Kiswahili are still undeveloped and the mistreatment of their Africa content moderators has not helped build confidence.¹⁴⁹ Journalists, fact-checking and news organisations, and civil society groups have come together in a collaborative journalism project, Fumbua, to unearth and investigate misinformation around the elections.¹⁵⁰



Population	55m
Internet penetration	85%

Kenya continues to lead the region in internet connectivity, mobile phone use, and social media engagement and this, in turn, has made the country a pioneer in digital innovation. One of the most popular new apps is Opera News (53%), an AI-driven personalised app that gives people more of what they like, from trending topics to funny videos. It also enables users to save mobile data by compressing certain data types through its servers before sending them on to the user. Most of the cheap android smartphones available in Kenya come preloaded with the Opera News app and users can receive free daily data up to a limit of 50MB/day. The free daily data cover browsing only.

Online sources (including social media) are the most widely accessed (92%) by our more urban and educated sample. Across the wider population, free-to-air digital terrestrial TV remains most popular – with radio also reaching a significant proportion of the population via more than 150 licensed stations in multiple languages. Television news bulletins and programmes present audiences with a whole gamut of entertaining political information, ranging from comedy to tragedy.

Catherine Gicheru

ICFJ Fellow and director of the Africa Women Journalism Project

¹⁴⁸ <https://foundation.mozilla.org/en/blog/fellow-research-inside-the-shadowy-world-of-disinformation-for-hire-in-kenya/>

¹⁴⁹ <https://time.com/6147458/facebook-africa-content-moderation-employee-treatment/>

¹⁵⁰ <https://fumbua.ke/about/>

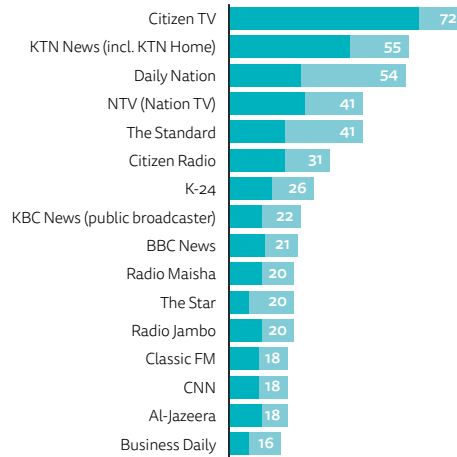
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

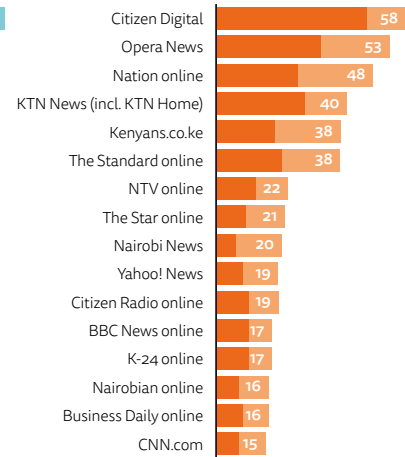
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

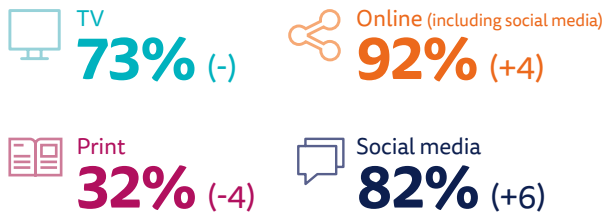


METHODOLOGY NOTE

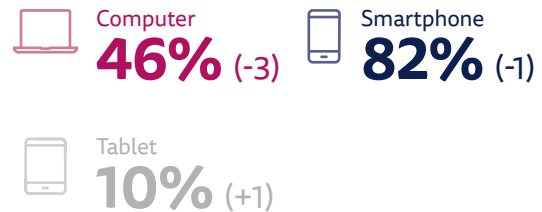
These data are based on an online survey of mainly English-speaking, online news users in Kenya – a subset of a larger, more diverse, media market. Respondents were generally more affluent, younger (18–50 only), have higher levels of formal education, and are more likely to live in cities than the overall Kenyan population. Findings should not be taken to be nationally representative.

CHANGING MEDIA

SOURCES OF NEWS



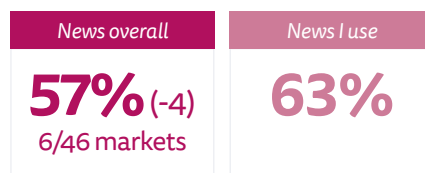
DEVICES FOR NEWS



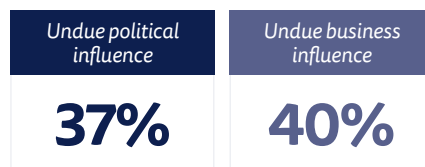
TRUST

Trust in news overall (57%) remains high compared with other countries in our survey. Commercial TV outlets, such as from the biggest media companies, tend to be the most trusted news sources alongside the *Daily Nation* newspaper and its associated website. By comparison, the state-owned broadcaster KBC has lower levels of trust, just ahead of popular papers such as *The Star* and *The Nairobiian*.

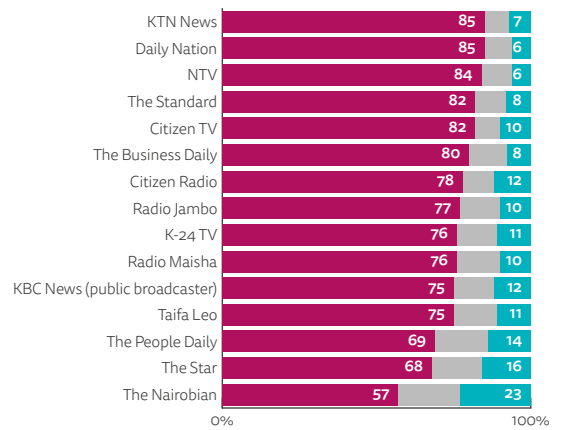
OVERALL TRUST SCORES



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

60%

SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	64% (+2)	78%	4	Twitter	36% (+2)	51%
2	WhatsApp	61% (-3)	88%	5	Instagram	29% (+7)	56%
3	YouTube	52% (+5)	82%	6	Telegram	20% (+3)	41%

NIGERIA

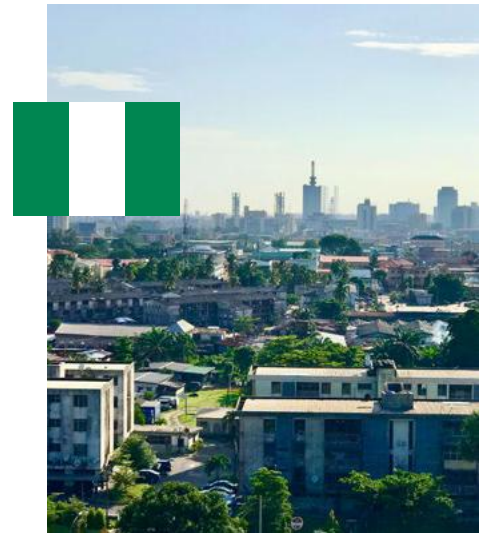
Nigeria's media scene is characterised by state and private broadcasters, popular international brands like the BBC and CNN, and more than 100 national and local print titles. The enormous popularity of social media has brought greater diversity but also an explosion of misinformation.

Media outlets are tapping into the growing vibrancy of Nigerian digital communities, with blogs, podcasts, and social media apps gaining prominence. Our Digital News Report survey shows that the vast majority (95%) of our educated English-speaking sample access news weekly via digital and social platforms, well ahead of TV (61%) and print (33%). Across the whole population, however, TV and radio remain the most important sources of news, although internet access is growing fast and it is estimated that there were around 33m social media users as of January 2022.¹⁵¹ Facebook (62%) and WhatsApp (60%) are still the dominant social networks used for news, but Telegram (26%) is gaining in popularity, with adoption in Nigeria leading the list of countries surveyed. The short video sharing platform TikTok is also seeing take-up among both mainstream and new media outlets, with Pulse Nigeria and Channels TV having over 804,000 and 26,400 TikTok followers respectively. Despite the integration of news organisations in social media, closed messaging apps like Telegram and WhatsApp have also been contributing to the burgeoning circulation of misinformation and disinformation on politics, elections, and COVID-19.

The government has become increasingly worried about digital platforms' influence in airing grievances, such as the recent #EndSars anti-police violence campaign. Twitter, the fifth most important social network for news in Nigeria, was banned for more than six months after it deleted a tweet by President Muhammadu Buhari. The authorities said the suspension – widely criticised by human rights organisations – was part of a wider response to the 'use of the platform for activities ... capable of undermining Nigeria's corporate existence'.¹⁵²

Following the lifting of the Twitter ban in January 2022, the government has pushed to regulate social media through the proposed National Broadcasting Commission (NBC) Act amendment bill. The plan has received significant backlash because of its potential for infringing on media freedom.¹⁵³ Other legislation being considered includes a data protection bill, a bill expanding criminal penalties for online speech, and one that extends the NBC's mandate to online content hosts.¹⁵⁴

Print media have responded to the shift of advertising revenue to the big platforms by exploring digital subscriptions as a way to sustain operations. *Daily Trust*, a widely read newspaper, launched Trust Plus, an online subscription service, in September 2021. Publishers with already existing membership programmes include *Premium Times* (including access to The Brief monthly newsletter), *Business Day*, and *Steers Business*. The impact of declining revenues and changing audience consumption patterns have also resulted in changes to how frequently some news organisations publish. *Daily Times* now publishes three times a week (previously daily), with *Champion* only publishing occasionally. Print publishers have also been asking for more direct government help, such as lowering the cost of production by subsidising printing materials. It is worth noting that the Federal Government of Nigeria has halted plans to subsidise TV's Digital Switch Over (DSO), as the country is on the verge of transitioning television broadcasting from analogue to digital.



Population	211m
Internet penetration	73%

There is an increase in the number of new digital media start-ups emerging, with some of these owned or managed by former employees of traditional media organisations, who were laid off at the pandemic's peak. Start-ups such as AllWomen and TraceReporter usually operate without a physical office and have adopted a model of aggregating news from other traditional newsrooms like *The Punch*, *The Vanguard*, and *The Nation*.

Media organisations are alarmed about the heightened insecurity in the country that has resulted in journalists being attacked, spied on, and arrested, with RSF's 2021 World Press Freedom Index (which saw Nigeria drop five places to 120) describing the country as 'one of West Africa's most dangerous and difficult countries for journalists'. The International Press Centre (IPC) and media organisations have called on Nigeria's security agencies to investigate the attacks and prosecute perpetrators.¹⁵⁵

While the shifting media business landscape has the potential to impact how news is covered, traditional media still enjoy a much higher trust rating than social media and new digital media products and are perceived as a vital pillar of democratic freedoms. The key issue going forward is how government regulations will adapt in relation to the ever-evolving digital environment.

Tolulope Adeyemo
with contributions by **Chris Roper**
Code for Africa

¹⁵¹ DataReportal – Nigeria Digital Data 2022. <https://datareportal.com/reports/digital-2022-nigeria>

¹⁵² <https://www.bloomberg.com/news/articles/2021-06-07/nigerian-regulator-drafts-new-rules-for-twitter-after-ban>

¹⁵³ <https://www.thecable.ng/exclusive-lai-moves-to-relaunch-bid-for-social-media-regulation-through-nbc-act>

¹⁵⁴ <https://freedomhouse.org/country/nigeria/freedom-net/2021>

¹⁵⁵ <https://www.mfwa.org/partner-highlights/IPC-decries-attacks-on-punch-newspapers-journalists-calls-for-immediate-investigations/>

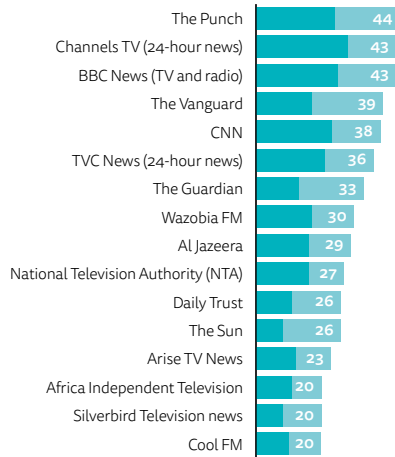
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

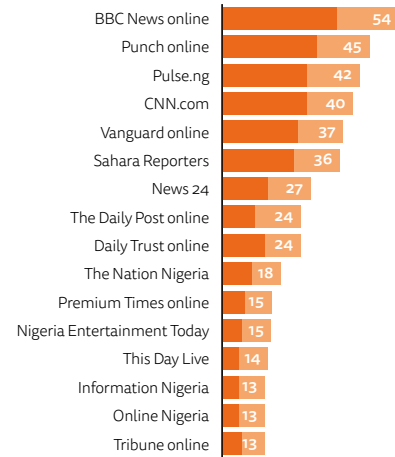
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

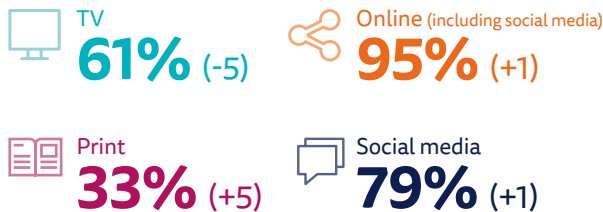


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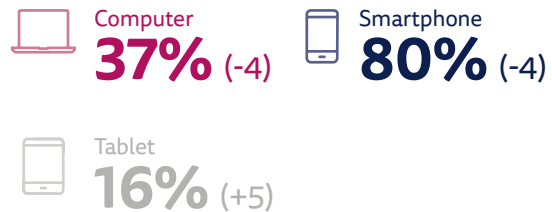
These data are based on a survey of English-speaking, online news users in Nigeria – a subset of a larger, more diverse, media market. Respondents are generally more affluent, younger (18–50 only), have higher levels of formal education, and are more likely to live in cities than the wider Nigerian population. Findings should not be taken to be nationally representative.

CHANGING MEDIA

SOURCES OF NEWS



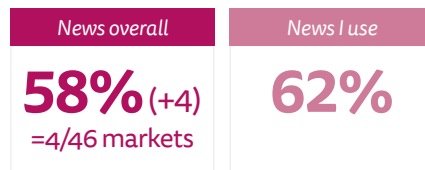
DEVICES FOR NEWS



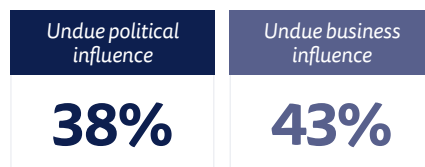
TRUST

Although overall trust in news increased to 58%, this could shift with 2023's upcoming elections, given that only 38% of respondents say they think media are independent of undue political or government influence. It is notable that privately owned local media as well as BBC News ranked higher in terms of trust than state-sponsored media such as the Nigerian Television Authority (NTA) and the News Agency of Nigeria (NAN).

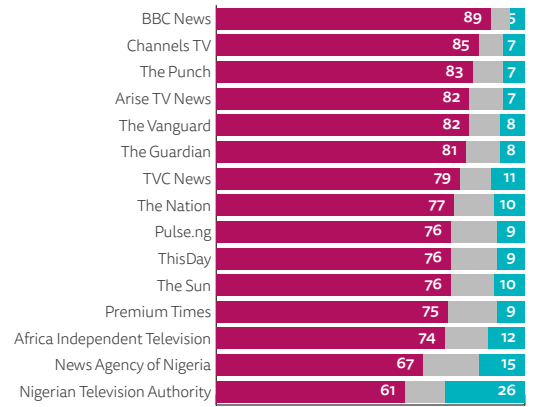
OVERALL TRUST SCORES



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

66%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	62% (-1)	76%	4	Instagram	40% (+6)	63%
2	WhatsApp	60% (-5)	83%	5	Twitter	38% (-6)	51%
3	YouTube	41% (+7)	71%	6	Telegram	26% (+3)	52%

SOUTH AFRICA

Trust in news has increased significantly over the last four years, but at the same time, the media environment is becoming an increasingly toxic terrain of mis/disinformation, of media titles being co-opted into political and corporate propaganda, and of coordinated attacks on the credibility of individual journalists. While the majority of media can still be characterised as free, ethical, and trustworthy, it would be remiss not to be wary of attempts to erode this.

Between 2019 and 2022, trust in news grew from 49% to 61% and South Africa now ranks 2nd out of 46 countries in our survey. Almost all the news brands included in the SA survey have also grown their rating, with News24 the most trusted brand in all four years surveyed (jointly with BBC in 2021). *City Press*, *Sowetan*, and *Daily Sun* have grown by as much as six or seven percentage points (pp) this year.

Trust is increasingly the currency foregrounded by South African news sites. Its most benign iteration is as a journalistic brand value, but in more invidious manifestations this has become a way of driving ideological partisanship. As an example of the former, News24, the country's largest news site, has changed its almost 24-year-old slogan from 'Breaking News. First' to 'Trusted News. First'. The change followed the introduction of a subscription model in 2020 for its premium investigative journalism, opinion, and analysis – gaining around 40,000 subscribers within the first year or so.

Other news organisations are actively contributing to an erosion in trust. In June 2021, Independent Media's *Pretoria News* published a concocted story about a woman giving birth to decuplets. The media group was not able to provide any evidence of this being true. Its own internal ombudsman found that the story was a 'hoax', saying 'in the haste to publish the story ... the trust factor in media has been seriously compromised'.¹⁵⁶ Flagrantly disregarding this finding, the media group's owner doubled down, publishing a series of video 'investigations' purporting to show the involvement of government and foreign nationals in a child trafficking scheme.

This example illuminates what journalism professor Anton Harber described as 'the problems of a media system that allows essential institutions of transparency, accountability and democracy to fall into the hands of rogues and charlatans'.¹⁵⁷ But it also showed that trust deficits introduced in one country can have an impact in others, with even the BBC having to publish corrections after uncritically regurgitating the original story.

Trust in the International News Media Association's (INMA) Global Media Awards was also compromised when judges, unaware of the context, shortlisted Independent's video investigations in the category Best Use of Social Media. Following complaints by the South African National Editors' Forum (SANEF), the entry was later removed.

South Africa is showing positive growth in diversity in newsrooms. A recent State of the Newsroom report indicated that in 2021 there was 'a slight increase in the number of black and coloured editors at newspapers, and fewer white editors are being employed'. The numbers, however, do not yet reflect the country's demographics, where about 10% of the population is white. In the 2022 Reuters Institute *Women and Leadership in the News Media* factsheet, South Africa ranked high (80%) in the category of percentage of online news users who say they get news from one or more major outlets with a woman as the top editor.¹⁵⁸

The State of the Newsroom report also revealed that advertising revenue dropped drastically across most media due to the pandemic, from 'anywhere between 40% and a complete absence of ad placements



Population	60m
Internet penetration	58%

for the period', and that 'journalists across the board were forced to take pay cuts – some as high as 45% – while freelancers said they lost as much as 80% of their income'. Underscoring the seriousness of the business threat to journalism, for the first time in its 23-year history the annual Nat Nakasa award for media integrity was given to a CEO/publisher, the Daily Maverick's Styli Charalambous, and not to a journalist.

The national broadcaster, SABC, dismissed its head of news, Phathiswa Magopeni, for what it said was 'a breakdown in the trust relationship'.¹⁵⁹ Magopeni alleged that her dismissal was politically motivated, coming as it did before the convening of a panel to address her grievances against editorial interference by management before the 2021 municipal elections.

Facebook (52%) and WhatsApp (43%) are still the most popular platforms as a source of news for South Africans, but are showing declines. TikTok (15%) is now on a par with Instagram, and increasingly being used by news organisations as a conduit for news.

Chris Roper
Deputy CEO, Code for Africa

¹⁵⁶ <https://www.news24.com/news24/southafrica/news/tembisa-10-independent-media-internal-ombud-brands-story-as-hoax-wants-titles-to-publish-apology-20211029>

¹⁵⁷ <https://www.news24.com/news24/opinions/fridaybriefing/anton-harber-tembisa-10-a-chain-of-bad-journalism-20210617>

¹⁵⁸ <https://reutersinstitute.politics.ox.ac.uk/women-and-leadership-news-media-2022-evidence-12-markets>

¹⁵⁹ <https://www.news24.com/news24/southafrica/news/just-in-sabc-fires-head-of-news-phathiswa-magopeni-20220128>

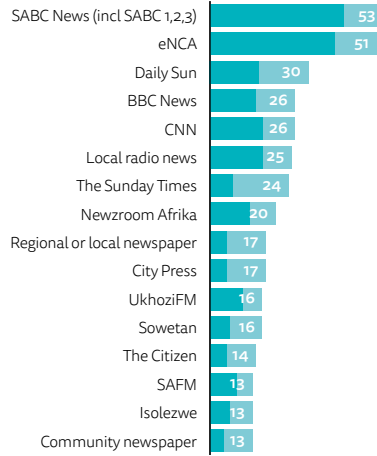
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

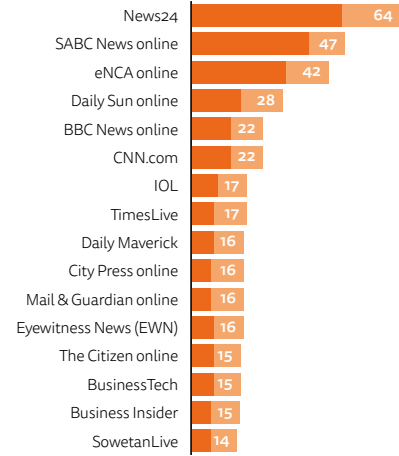
% Weekly usage

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TV, RADIO AND PRINT



ONLINE

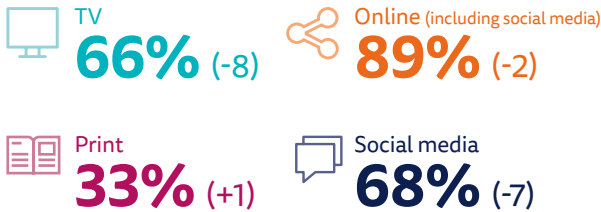


METHODOLOGY NOTE

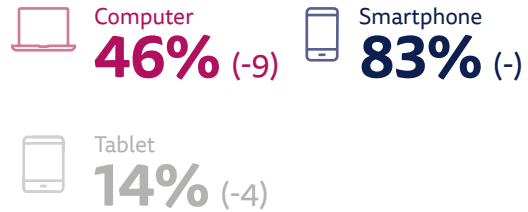
These data are based on a survey of English-speaking, online news users in South Africa – an important part of a larger, more diverse, media market. Respondents are generally more affluent, younger, have higher levels of formal education, and are more likely to live in cities than the wider South African population. Findings should not be taken to be nationally representative.

CHANGING MEDIA

SOURCES OF NEWS



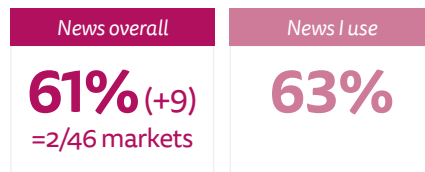
DEVICES FOR NEWS



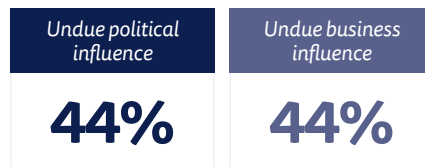
TRUST

The overall growth and high level (2nd out of 46) of trust in media in South Africa is mirrored in the individual brands surveyed, with a growth in trust in the majority of brands surveyed. This could indicate a growing polarisation, with audiences cleaving to the brands that map to their personal belief systems.

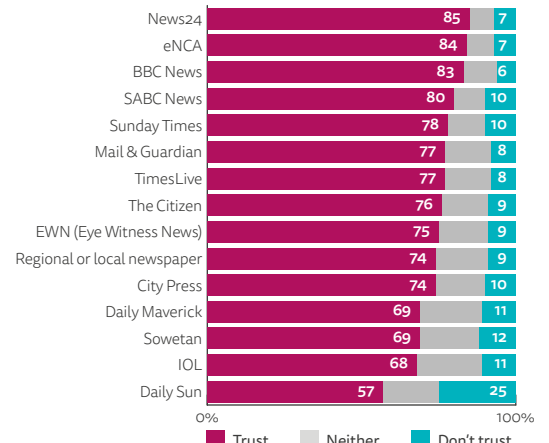
OVERALL TRUST SCORES



MEDIA IS FREE FROM ...



BRAND TRUST SCORES



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65%

SHARE NEWS via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	52% (-3)	71%	4	Twitter	28% (-)	39%
2	WhatsApp	43% (-9)	78%	5	Instagram	16% (-1)	44%
3	YouTube	39% (-)	71%	6	TikTok	15% (+7)	41%

4



SECTION 4

References

The authors welcome feedback on this report and suggestions on how to improve our work via reuters.institute@politics.ox.ac.uk as well as potential partnerships and support for our ongoing work.



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