Reuters Institute Digital News Report 2023



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Reuters Institute Digital News Report 2023

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

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Foreword

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

This year's *Reuters Institute Digital News Report* provides further evidence that, even as much of the news industry globally has struggled in the face of the first waves of the move to a digital, mobile, and platform-dominated media environment, it now faces a much more fundamental change driven by generations who have grown up with and rely almost entirely on various digital media.

Whether or not legacy media feel they have completed their initial *digital transformation* from print- or broadcast-focused to digitally focused brands with a compelling news website and app, they now face a continual *transformation of digital* as generations come of age who eschew direct discovery for all but the most appealing brands, have little interest in many conventional news offers oriented towards older generations' habits, interests, and values, and instead embrace the more participatory, personable, and personalised options offered via platforms, often looking beyond legacy platforms to new entrants (many of whom drive few referrals to news and do not prioritise news).

While there are important differences between countries and within generations, and no single uniform pattern of behaviour and preferences, it is important to underline that we have every reason to expect this to be a one-way change: people's information needs and interests evolve in the course of their life, but their platform preferences rarely regress. Those born in the 1980s did not suddenly come to prefer landline phones over mobiles when they became parents or bought a house, nor did those born in the 1960s return to black-and-white television when they entered middle age. There are no reasonable grounds for expecting that those born in the 2000s will suddenly come to prefer old-fashioned websites, let alone broadcast and print, simply because they grow older.

The public is voting with its attention and money, and – despite the very real reservations over uneven trustworthiness, the risks of harassment and misinformation, and sometimes problematic business and data protection practices – they are overwhelmingly, everywhere, voting for digital media. That is the media environment the public embraces, and the 'new normal' where journalists and news media have to carve out their places if they want to connect with the public.

The 46 markets we analyse in the *Digital News Report* account for more than half the world's population, and can perhaps illuminate trends elsewhere. 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 reutersinstitute.politics.ox.ac.uk 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 (now the Coimisiún na Meán), the Dutch Media Authority (CvdM), the Media Industry Research Foundation of Finland, the Fritt Ord Foundation, the Korea Press Foundation, Edelman UK, NHK, and the Reuters News Agency, as well as our academic sponsors at the Leibniz Institute for Media Research/ Hans Bredow Institute, the University of Navarra, the University of Canberra, the Centre d'études sur les médias, Québec, Canada, and Roskilde University, Denmark. Fundación Gabo continues to support the translation of the report into Spanish. We are delighted that Code for Africa has joined our network of sponsors to enable us to continue and in the future hopefully expand our work in Sub-Saharan Africa.

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 2023.

- Samples were assembled using nationally representative quotas for age, gender, and region in every market. Education quotas were also applied in all markets except Kenya, India, Indonesia, Malaysia, Nigeria, Philippines, South Africa, and Thailand. We also apply political quotas based on vote choice in the most recent national election in around a third of our markets, including the United States, Australia, and much of Western Europe. 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 to 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 (60%), where internet penetration is lower, the differences between the online population and the national population will be large, meaning we need to be cautious when comparing between markets.
- The use of a non-probability sampling approach means that it is not possible to compute a conventional 'margin of error' for individual data points. However, differences of +/- 2 percentage points (pp) or less are very unlikely to be statistically significant and should be interpreted with a very high degree of caution. We typically do not regard differences of +/- 2pp as meaningful, and as a general rule we do not refer to them in the text. The same applies to small changes over time.
- Surveys capture people's self-reported behaviour, which does not always reflect people's actual behaviour due to biases and imperfect recall. They are useful for capturing people's opinions, but these are subjective and aggregates reflect public opinion rather than objective reality.[2] Even with relatively large sample sizes it is not possible to meaningfully analyse many minority groups. Some of our survey-based results will not match industry data, which are often based on different methodologies, such as web-tracking.
- 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 reutersinstitute.politics.ox.ac.uk.

Market	Sample size	Population	Internet penetration
Europe			
UK	2,107	68.5m	95%
Austria	2,029	9.1m	88%
Belgium	2,025	11.7m	92%
Bulgaria	2,027	6.9m	70%
Croatia	2,024	4m	93%
Czech Republic	2,047	10.7m	87%
Denmark	2,033	5.8m	98%
Finland	2,027	5.6m	94%
France	2,078	65.5m	92%
Germany	2,002	84m	94%
Greece	2,023	10.3m	79%
Hungary	2,000	9.6m	89%
Ireland*	2,035	5m	92%
Italy	2,106	60.3m	91%
Netherlands	2,022	17.2m	95%
Norway	2,022	5.5m	98%
Poland	2,030	37.9m	92%
Portugal	2,010	10.1m	88%
Romania	2,107	19m	78%
Slovakia	2,093	5.5m	90%
Spain	2,031	46.8m	93%
Sweden	2,034	10.2m	97%
Switzerland	2,037	8.8m	96%
Turkey	2,016	85.8m	85%
Americas			
USA	2,081	331m	90%
Argentina	2,014	45.9m	91%
Brazil	2,047	215m	83%
Canada*	2,150	37.7m	94%
Chile	2,013	19.4m	97%
Colombia	2,036	51.8m	83%
Mexico	2,029	132.3m	67%
Peru	2,010	33.7m	87%
Asia-Pacific			
Australia	2,025	26m	90%
Hong Kong	2,023	7.6m	92%
India	2,016	1,414m	60%
Indonesia	2,012	278.3m	76%
Japan	2,009	127.2m	93%
Malaysia	2,015	33m	94%
Philippines	2,284	112m	91%
Singapore	2,025	5.9m	92%
South Korea	2,003	51.3m	97%
Taiwan	2,037	23.9m	95%
Thailand	2,028	70.1m	88%
Africa			
Kenya	2,025	55.8m	85%
Nigeria	2,025	211.4m	73%
South Africa	2,013	60m	58%

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

*In Ireland and Canada we conducted a repoll of brand reach numbers offline in late March 2023 due to missing a brand in the original poll in each case. We only used the repoll to deliver a number for the missing brand. All other numbers are taken from the January/February poll unless stated.

[1] Respondents in India could choose to complete the survey in Hindi and respondents in Kenya could chose 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 Director of Research at the Reuters Institute for the Study of Journalism. 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 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, and the role of identity in each.



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.



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 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, David Eastbury, Tibet Quinn, and Iyanu Taiwo.

SECTION 1



SECTION 1

Executive Summary and Key Findings

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



This year's report comes against the backdrop of a global cost-of-living crisis, a continuing war in the heart of Europe, and further climate instability across the world. In this context, a strong supply of accurate, well-funded, independent journalism remains critical, but in many of the countries covered in our survey, we find these conditions challenged by low levels of trust, declining engagement, and an uncertain business environment.

Our report aims to bring new insights on these issues at what is a particularly difficult time for the industry as well as for many ordinary people. We look in more detail what is *behind* low engagement and selective news avoidance – and we explore public appetites for approaches that might combat this. More specifically, we look at the sources people use to inform themselves about their personal finances and the extent to which different groups find this type of information easy or difficult to understand.

In the light of the squeeze on household spending, we find that many people have been rethinking how much they can afford to spend on news media. We have conducted detailed qualitative research in the UK, US, and Germany with consumers who have cancelled, maintained, and started subscriptions in the last year to understand the underlying motivations for signing up – as well as key barriers. In our country and market pages, which combine industry developments with local data, we see how different media companies are managing the economic downturn with many accelerating their path to digital by shifting resources further away from broadcast or print.

Perhaps the most striking findings in this year's report relate to the changing nature of social media, partly characterised by declining engagement with traditional networks such as Facebook and the rise of TikTok and a range of other video-led networks. Yet despite this growing fragmentation of channels, and despite evidence that public disquiet about misinformation and algorithms is at near record highs, our dependence on these intermediaries continues to grow. Our data show, more clearly than ever, how this shift is strongly influenced by habits of the youngest generations, who have grown up with social media and nowadays often pay more attention to influencers or celebrities than they do to journalists, even when it comes to news.

In our extra analysis chapters this year, we've identified the most popular news podcasts in around a dozen countries along with the platforms that are most used to access this content. We also explore increasing levels of criticism of the news media, often driven by politicians and facilitated by social media. We also devote a section to the particular case of public service media that have been at the forefront of this criticism and face particular challenges in delivering their universal mission in a fractious and fragmented media environment.

This twelfth edition of our *Digital News Report*, which is based on data from six continents and 46 markets, reminds us of the different conditions in which journalism operates in many parts of the world, but also about the common challenges faced by publishers around weak audience engagement and low trust in an age of abundant digital and social media. 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.

A SUMMARY OF SOME OF THE MOST IMPORTANT FINDINGS FROM OUR 2023 RESEARCH.

- Our data show how the various shocks of the last few years, including the Ukraine war and the Coronavirus pandemic, have accelerated structural shifts towards more digital, mobile, and platform-dominated media environments, with further implications for the business models and formats of journalism.
- Across markets, only around a fifth of respondents (22%) now say they prefer to start their news journeys with a website or app – that's down 10 percentage points since 2018. Publishers in a few smaller Northern European markets have managed to buck this trend, but younger groups everywhere are showing a weaker connection with news brands' own websites and apps than previous cohorts – preferring to access news via side-door routes such as social media, search, or mobile aggregators.
- Facebook remains one of the most-used social networks overall, but its influence on journalism is declining as it shifts its focus away from news. It also faces new challenges from established networks such as YouTube and vibrant youth-focused networks such as TikTok. The Chinese-owned social network reaches 44% of 18–24s across markets and 20% for news. It is growing fastest in parts of Asia-Pacific, Africa, and Latin America.
- When it comes to news, audiences say they pay more attention to celebrities, influencers, and social media personalities than journalists in networks like TikTok, Instagram, and Snapchat. This contrasts sharply with Facebook and Twitter, where news media and journalists are still central to the conversation.
- Much of the public is sceptical of the algorithms used to select what they see via search engines, social media, and other platforms. Less than a third (30%) say that having stories selected for me on the basis of previous consumption is a good way to get news, 6 percentage points lower than when we last asked the question in 2016. Despite this, on average, users still slightly prefer news selected this way to that chosen by editors or journalists (27%), suggesting that worries about algorithms are part of a wider concern about news and how it is selected.
- Despite hopes that the internet could widen democratic debate, we find fewer people are now participating in online news than in the recent past. Aggregated across markets, only around a fifth (22%) are now active participators, with around half (47%) not participating in news at all. In the UK and United States, the proportion of active participators has fallen by more than 10 percentage points since 2016. Across countries we find that this group tends to be male, better educated, and more partisan in their political views.
- Trust in the news has fallen, across markets, by a further 2 percentage points in the last year, reversing in many countries the gains made at the height of the Coronavirus pandemic. On average, four in ten of our total sample (40%) say they trust most news most of the time. Finland remains the country with the highest levels of overall trust (69%), while Greece (19%) has the lowest after a year characterised by heated arguments about press freedom and the independence of the media.
- Public media brands are amongst those with the highest levels of trust in many Northern European countries, but reach has

been declining with younger audiences. This is important because we find that those that use these services most frequently are more likely to see them as important *personally* and *for society*. These findings suggest that maintaining the breadth of public service reach remains critical for future legitimacy and especially with younger groups.

- Consumption of traditional media, such as TV and print, continues to fall in most markets, with online and social consumption not making up the gap. Our data show that online consumers are accessing news less frequently than in the past and are also becoming less interested. Despite the political and economic threats facing many people, fewer than half (48%) of our aggregate sample now say they are very or extremely interested in news, down from 63% in 2017.
- Meanwhile, the proportion of news consumers who say they avoid news, often or sometimes, remains close to all-time highs at 36% across markets. We find that this group splits between (a) those who are trying to periodically avoid *all sources* of news and (b) those that are trying to specifically restrict their news usage *at particular times* or *for certain topics*. News avoiders are more likely to say they are interested in positive or solutions-based journalism and less interested in the big stories of the day.
- With household budgets under pressure and a significant part of the public satisfied with the news they can access for free, there are signs that the growth in online news payment may be levelling off. Across a basket of 20 richer countries, 17% paid for any online news – the same figure as last year. Norway (39%) has the highest proportion of those paying, with Japan (9%) and the United Kingdom (9%) amongst the lowest. Amongst those cancelling their subscription in the last year, the cost of living or the high price was cited most often as a reason. In the United States, Germany, and the United Kingdom, about half of non-subscribers say that *nothing* could persuade them to pay for online news, with lack of interest or perceived value remaining fundamental obstacles.
- As in previous years, we find that a large proportion of digital subscriptions go to just a few upmarket national brands – reinforcing the *winner takes most* dynamics that are often associated with digital media. But in a number of countries, including the United States, we are now seeing the majority of those paying taking out *more than one* subscription. This reflects the increased supply of discounted offers as well as the introduction of *all-access* bundles in some markets.
- Across countries the majority of online users say they still prefer to read the news rather than watch or listen to it. Text provides more speed and control in accessing information, but in a few countries, such as the Philippines and Thailand, respondents now say they prefer video to text. Video news consumption has been growing steadily across markets, with most video content now accessed via third-party platforms such as YouTube and Facebook.
- News podcasting continues to resonate with educated and younger audiences but remains a minority activity overall. Around a third (34%) access a podcast monthly, with 12% accessing a show relating to news and current affairs. Our research finds that deep dive podcasts, inspired by The Daily from the *New York Times*, along with extended chat shows, such as The Joe Rogan Experience, are the most widely consumed across markets. We also identify the growing popularity of video-led or hybrid news podcasts.

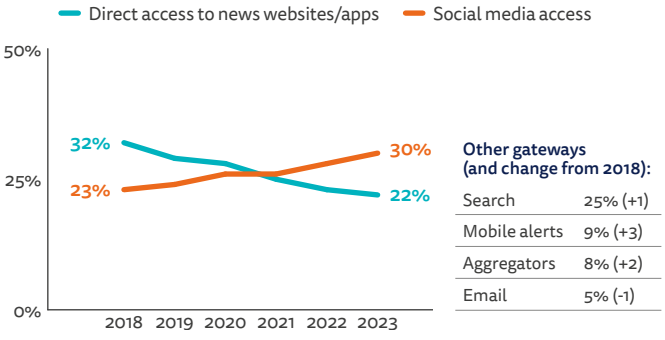
CHANGING PLATFORMS AND THE IMPLICATIONS FOR PUBLISHERS

A running sore for news publishers over the last decade or more has been the increasing influence of tech platforms and other intermediaries on the way news is accessed and monetised. Although search and social media play different roles, news access has for some time been dominated by two giant companies: Google and Facebook (now Meta), who at their height accounted for just under half of online traffic to news sites.[3] Although the so-called 'duopoly' remains hugely consequential, our report this year shows how this platform position is becoming a little *less* concentrated in many markets, with more providers competing. The growing popularity of digital audio and video is bringing new platforms into play while some consumers have adopted less toxic and more private messaging networks for communication. In some sense these changes represent a 'new normal' where publishers need to navigate an even more complex platform environment in which attention is fragmented, where trust is low, and where participation is even less open and representative.

Gateways to content over time

We continue to monitor the main access points to online news and examine the impact on consumption with different groups. Every year, we see direct access to apps and websites becoming less important and social media becoming more important due to their ubiquity and convenience. At an aggregate level, we reached a tipping point in the last few years, with social media preference (30%) now stretching its lead over direct access (22%).

PROPORTION THAT SAY EACH IS THEIR MAIN WAY OF GETTING NEWS ONLINE (2018–2023) – ALL MARKETS

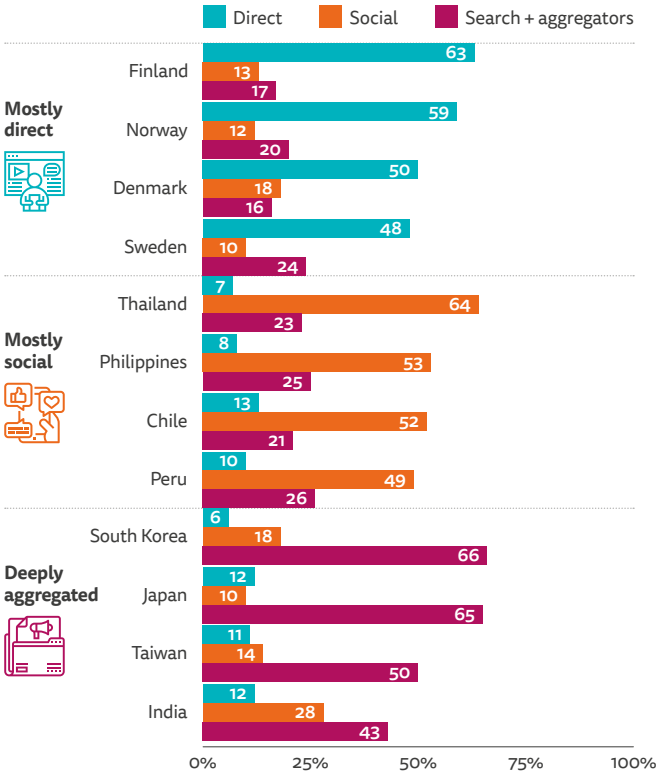


Q10a_new2017_rc. Which of these was the main way in which you came across news in the last week? *Base: All who used a news gateway in the last week in each market-year ≈ 2000. Note: Number of markets grew from 36 in 2018 to 46 from 2021 onwards. Markets listed in online methodology.*

But these are averages, and there remain substantial differences across countries. News brands in some Northern European markets still have strong direct connections with consumers when it comes to online news, even though platforms are still almost universally used in these markets for a range of other purposes. By contrast, in parts of Asia, Latin America, and Africa, social media is by far the most important gateway, leaving news brands much more dependent on third-party traffic. In other Asia-Pacific markets – such as Japan and Korea – home-grown portals such as Naver and Yahoo! are the primary access points to content, while in India and Indonesia, mobile news aggregators play an important gateway role.

[3] According to the online measurement site Parse.ly, which tracked aggregate data on referral traffic based on publishers in their network.

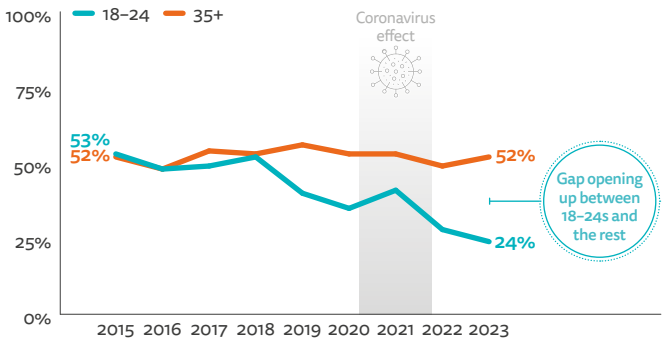
PROPORTION THAT SAY EACH IS THEIR MAIN WAY OF GETTING NEWS ONLINE – SELECTED MARKETS



Q10a_new2017_rc. Which of these was the main way in which you came across news in the last week? *Base: All who used a news gateway in the last week in each market ≈ 2000.*

Leaving aside market differences, we also find substantial differences by age group. In almost every case, we find that younger users are less likely to go directly to a news site or app and more likely to use social media or other intermediaries. In analysing this further we find that the annual changes we see in direct vs. social seem to be driven less by older individuals changing their behaviours and more by emerging behaviours of younger groups. The following chart for the UK shows that over-35s (orange line) have hardly changed their access preferences over time, but that the 18–24 group (blue line) has become significantly less likely to use a news website or app. This represents an influx into our survey of more 'social natives' who grew up in the age of social and messaging apps, and seem to be displaying very different behaviours as a result.

PROPORTION THAT ACCESSED ONLINE NEWS BY GOING DIRECT TO A NEWS WEBSITE OR APP IN THE LAST WEEK (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: 18–24s/35+ in each year ≈ 200/1400.*

This reduced dependence on direct access is mirrored by increased use of social media for news. In the UK 41% of 18–24s say social media is now their main source of news (43% across markets), up from 18% in 2015. These changes are not confined to these so-called 'social natives', with some young millennials showing increased dependence on platforms and social media. The problems publishers face in engaging young audiences is only going to get harder over time.

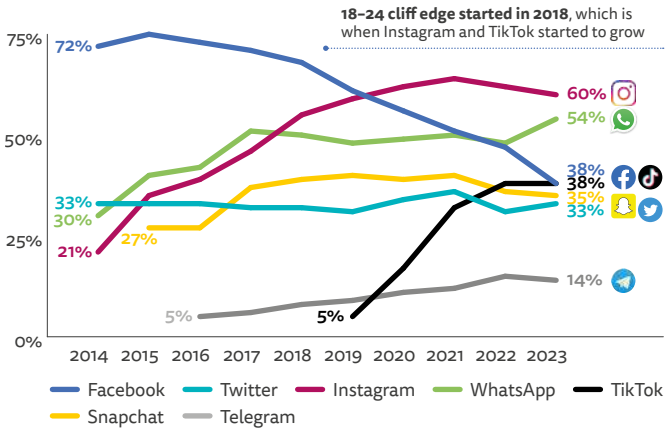
Social network fragmentation

Dependence on social media may be growing, but it is not necessarily the same old networks. Turning to the 12 countries we have been tracking since 2014 we find that in aggregate, Facebook usage for any purpose (57%) is down 8pp since 2017. Instagram (+2pp), TikTok (+3pp), and Telegram (+5pp) are the only networks to have grown in the last year, with much of this coming from younger groups.

Despite Elon Musk's idiosyncratic stewardship of Twitter, the network's overall weekly reach remained stable at 22% when our survey was in the field, even if engagement levels may have dipped. There has been no mass exodus to Mastodon, which does not even register in most markets and is used by just 2% in the United States and Germany.

But there have been much more dramatic shifts in the networks used by younger audiences in the last few years. In the following chart, we illustrate how interest in Facebook has waned much faster for under-25s, with attention shifting first to Instagram and Snapchat and now to TikTok. The controversial Chinese-owned app has overtaken Twitter and Snapchat with this group and now has a similar reach to Facebook itself. Other networks such as Discord (15%) and Twitch (12%) are also more widely used by this demographic.

PROPORTION OF 18–24S THAT USE EACH SOCIAL NETWORK FOR ANY PURPOSE IN THE LAST WEEK (2014–2023) – AVERAGE OF SELECTED COUNTRIES

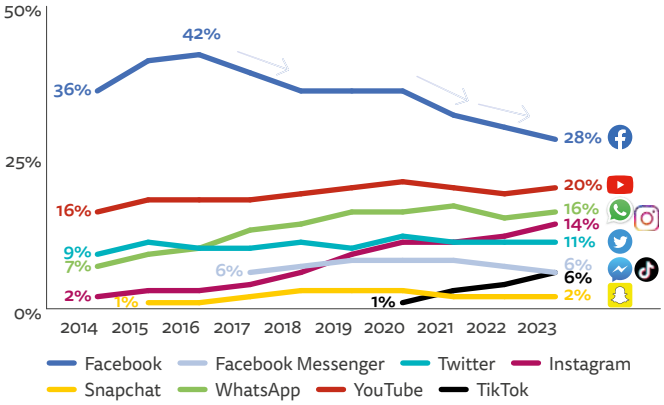


Q12A. Which, if any, of the following have you used for any purpose in the last week? *Base: 18–24s in each country-year in UK, USA, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia, Brazil, and Ireland ≈ 200. Note: No data from Australia or Ireland in 2014.*

This chart illustrates how attention has shifted, from a few big networks that drove substantial traffic to news websites to a much wider range of apps that require more investment in bespoke content and offer fewer opportunities to post links.

Turning to *news usage* specifically across all ages, Facebook remains the most important network (aggregated across 12 countries) at 28%, but is now 14 points lower than its 2016 peak (42%). Facebook has been distancing itself from news for some time, reducing the percentage of news stories people see in their feed (3% according to the company's latest figures from March 2023),[4] but in the last year it has also been scaling back on direct payments to publishers and other schemes that supported journalism. The growth of YouTube as a news source is often less noticed, but together with the rise of TikTok demonstrates the shift towards video-led networks.

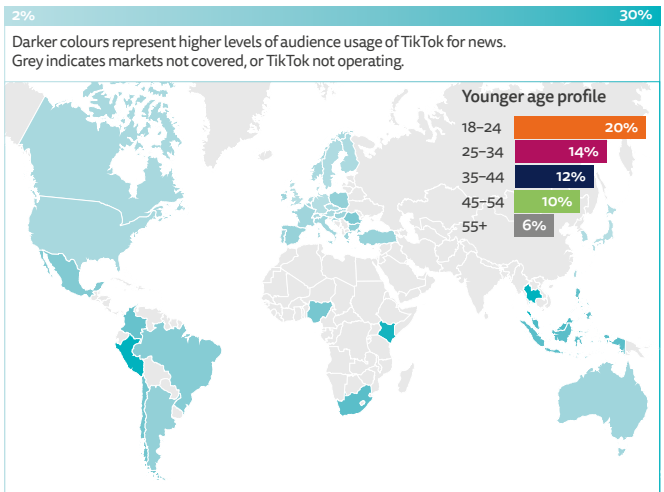
PROPORTION THAT USED EACH SOCIAL NETWORK FOR NEWS IN THE LAST WEEK (2014–2023) – AVERAGE OF SELECTED COUNTRIES



Q12B. Which, if any, of the following have you used for news in the last week? *Base: Total sample in each country-year in UK, USA, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia, Brazil, and Ireland ≈ 2000. Note: No data from Australia or Ireland in 2014.*

Although the averages for TikTok are relatively low, usage is much higher with younger groups and in some Asia-Pacific, Latin American, and African countries. It has played a role in spreading both information and misinformation in recent elections in Kenya[5] and Brazil[6] and has grown strongly in parts of Eastern Europe, where the Ukrainian conflict increased its profile.

PROPORTION THAT USED TIKTOK FOR NEWS IN THE LAST WEEK



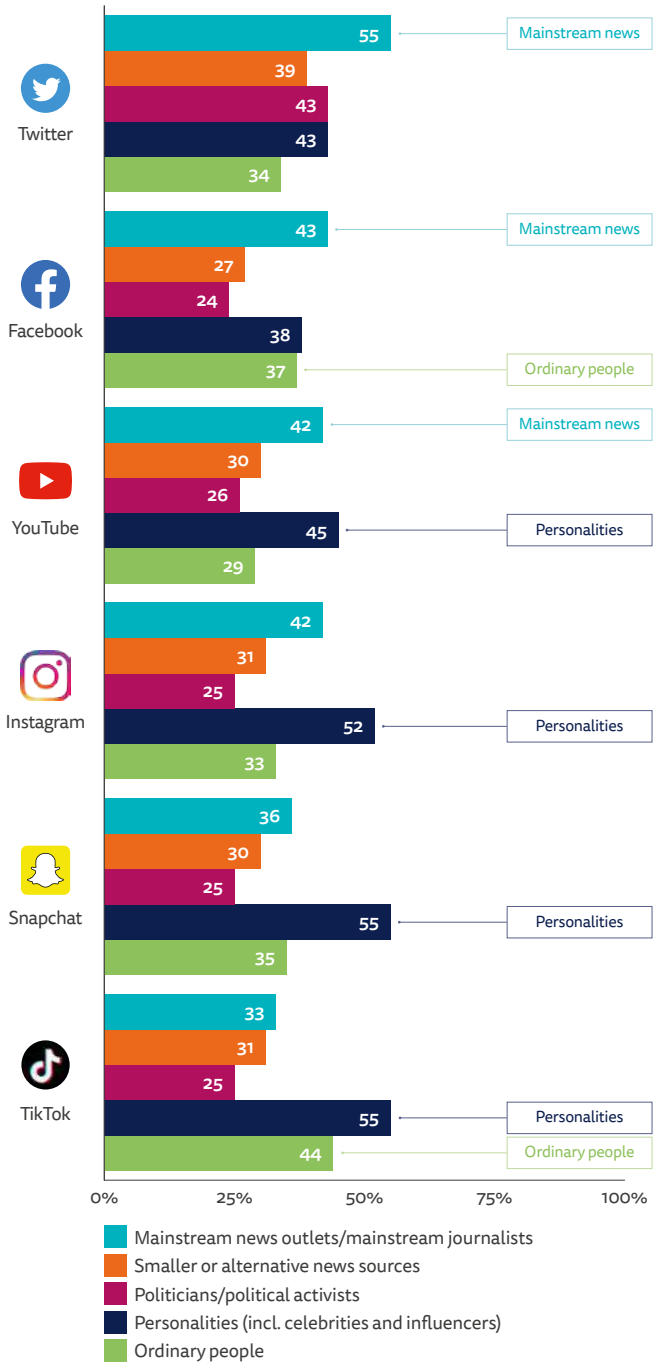
Highest adoption for news/any purpose				Lowest adoption	
Peru	30% / 48%	Malaysia	24% / 42%	Denmark	2% / 11%
Thailand	30% / 51%	South Africa	22% / 50%	Japan	3% / 9%
Kenya	29% / 54%	Philippines	21% / 42%	Germany	3% / 12%

Q12B. Which, if any, of the following have you used for news in the last week? *Base: Total sample in each market ≈ 2000. Note: TikTok has been banned in India and does not operate in Hong Kong.*

The role of news and journalists in different networks

This year we have returned to questions we asked first in 2021 to understand more about where audiences pay attention when using different networks.[7] We find that, while mainstream journalists often lead conversations around news in Twitter and Facebook, they struggle to get attention in newer networks like Instagram, Snapchat, and TikTok, where personalities, influencers, and ordinary people are often more prominent, even when it comes to conversations around news.

PROPORTION THAT PAY ATTENTION TO EACH SOURCE FOR NEWS (BY SOCIAL NETWORK) – ALL MARKETS

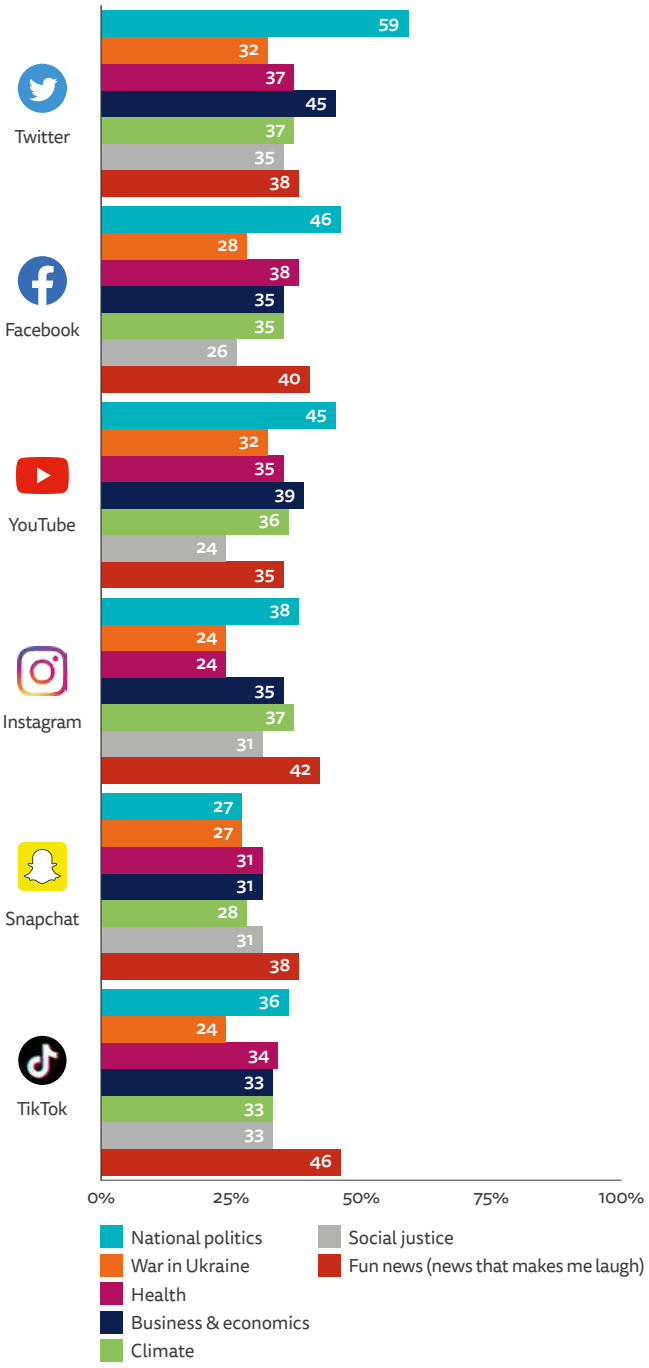


Q12_Social_sources. You said that you use <social network> for news ... When it comes to news on <social network>, which of these sources do you generally pay most attention to? Please select all that apply. *Base: Randomly selected news users of Facebook = 24,711, Twitter = 6046, YouTube = 16,543, Instagram = 8023, Snapchat = 932, TikTok = 4322.*

4 https://about.fb.com/news/2023/03/news-industry-reaps-considerable-economic-benefit-from-facebook/
5 https://www.aljazeera.com/news/2022/6/10/tiktok-videos-stoke-tensions-ahead-of-kenya-vote-says-report
6 https://www.codastory.com/disinformation/eletion-disinformation-brazil-tiktok/
7 In 2021 we only gave respondents one option but in 2023 we allowed multiple options to be selected so the data are not directly comparable.

Publishers have been unsure whether and how to adapt their storytelling to these new platforms. As a recent Reuters Institute report on the subject showed (Newman 2022), about half of top publishers are now creating content for TikTok, even as others are holding back over concerns about Chinese government influence – as well as the lack of monetisation. But fears about the unchecked spread of misinformation on the platform, and the potential for connecting with hard-to-reach younger audiences, have convinced some news organisations to stake a presence despite the risks.

PROPORTION THAT PAY ATTENTION TO EACH NEWS TOPIC (BY SOCIAL NETWORK) – ALL MARKETS

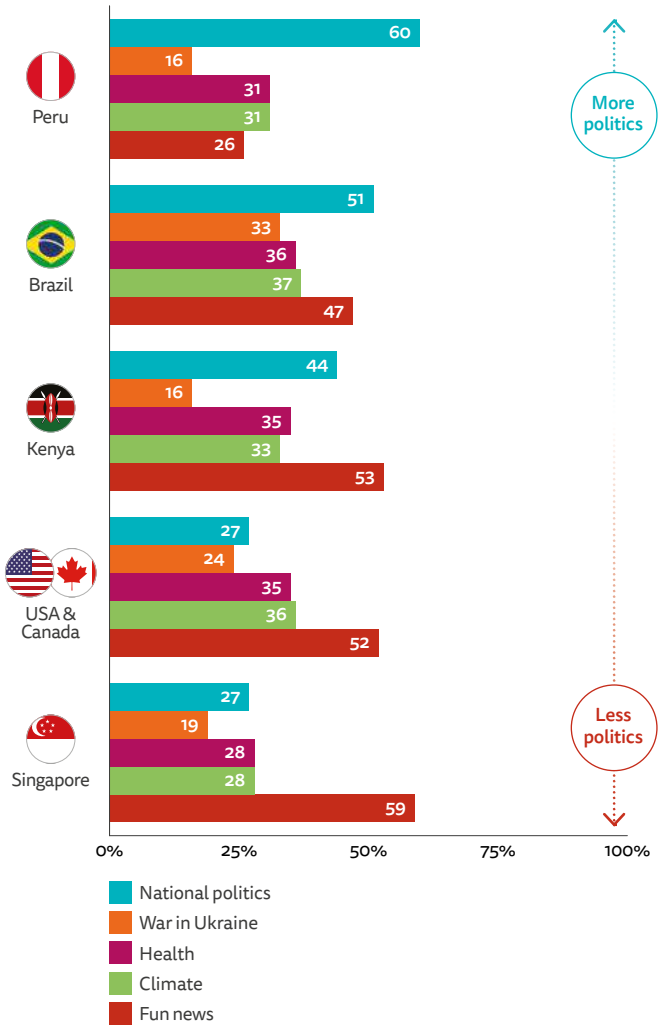


Q12_Social_subjects. You said that you use <social network> for news ... When it comes to news on <social network>, what types of content do you mostly pay attention to? Please select all that apply. *Base: Randomly selected news users of Facebook = 24,711, Twitter = 6046, YouTube = 16,543, Instagram = 8023, Snapchat = 932, TikTok = 4322.*

We've also explored for the first time the *news topics* that resonate in different networks. Again, we find big differences here in terms of audience expectations and interests (see chart left). Twitter users are more likely to pay attention to hard news subjects such as politics and business news than users of other networks, whereas TikTok, Instagram, and Facebook users are slightly more likely to consume fun posts (or satire) that relate to news. It is also striking to note the ambivalence, and possibly fatigue, over the war in Ukraine across all networks. Despite the topic's importance, we find lower levels of attention when compared with fun news, national politics, or even news about business and economics. It is not clear if this relates to falling interest in general, algorithmic biases, or a mix of the two.

Digging further into the data, we find interesting country and regional differences. TikTok is used much more for political news in Peru, where it has been used by students to organise political protests, as well as in Kenya and Brazil, than it is in the United States, Canada, or Singapore.

PROPORTION THAT PAY ATTENTION TO EACH NEWS TOPIC ON TIKTOK – SELECTED COUNTRIES



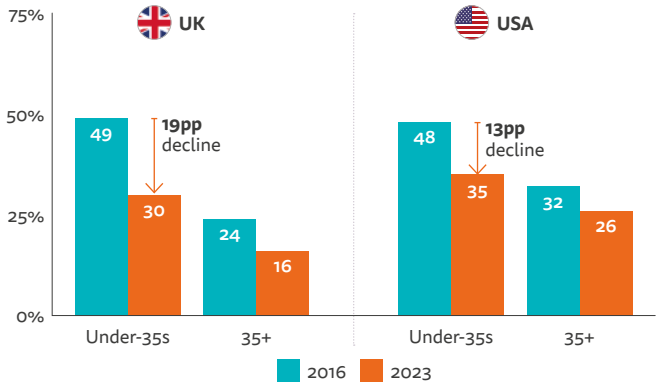
Q12_Social_subjects_TikTok. You said that you use TikTok for news ... When it comes to news on TikTok, what types of content do you mostly pay attention to? Please select all that apply. *Base: Randomly selected TikTok news users in Peru = 274, Brazil = 117, Kenya = 205, USA & Canada = 112, Singapore = 105. Note: Differences of less than +/-10pp should be treated with caution due to small base sizes.*

Growing scepticism towards algorithms when it comes to news

TikTok's powerful personalised content feed has refocused attention on the way algorithms can affect our media diets – especially those that deliver 'more of what you have consumed in the past'. We last looked at public perceptions of such technologies in 2016 when Facebook's then novel approach to surfacing popular news stories was at its peak.

Since then, we find that people in many countries are less happy about the selection of content both from algorithms and from journalists. These changes are not significant in all markets, but there has been a bigger fall in satisfaction in content-based algorithms amongst younger users (who rely the most on them).

PROPORTION THAT AGREE THAT HAVING STORIES AUTOMATICALLY SELECTED FOR THEM BASED ON 'WHAT I HAVE CONSUMED IN THE PAST' IS A GOOD WAY TO GET NEWS – UK AND USA

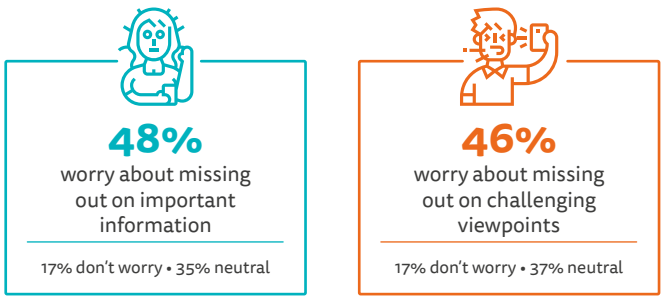


Q10D_2016a_2. To what extent do you agree with the following statement? Having stories automatically selected for me on the basis of what I have consumed in the past is a good way to get news. *Base: U35s/35+ in each year in UK ≈ 449/1658, USA ≈ 603/1478.*

Across ages, the proportion who agree that algorithmically selected news is a good way to get news has shrunk compared to 2016, while the proportion who disagree has stayed roughly the same – meaning that more people now select the neutral middle option. This suggests that for some people a generally positive view of algorithmic news selection has shifted towards ambivalence over time.

The reasons for this change are not entirely clear. We know from last year's qualitative research that many young people feel overwhelmed by the negative nature of news in their social media feeds. We also know that the imposition of algorithmic instead of pure reverse chronology feeds has caused disquiet amongst a section of the most-heavy social media users in Facebook and more recently in Twitter. In interviews, respondents also frequently express fears that social media may be pushing them down rabbit holes, though this could be related to increased commentary about these issues as much as actual experience. Either way, in this year's data we find continued high levels of concern that 'overly personalised' news could lead to missing out on important information or being exposed to fewer challenging viewpoints (similar to 2016).

PROPORTION THAT WORRY ABOUT MISSING OUT DUE TO PERSONALISATION – AVERAGE OF SELECTED MARKETS

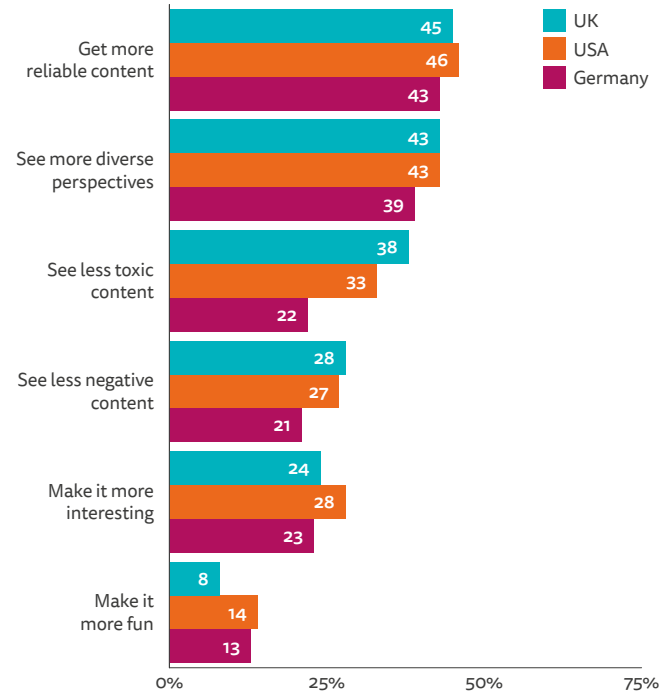


Q10D_2016b_1/2. To what extent do you agree with the following statement? I worry that more personalised news may mean that I miss out on important information/challenging viewpoints. *Base: Total samples in USA, UK, Germany, France, Italy, Spain, Portugal, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Hungary, Czech Republic, Poland, Greece, Turkey, Japan, South Korea, Australia, Canada, Brazil = 53,039.*

Given lower satisfaction with some algorithmic selection, it is not surprising to find that around 65% of younger users (under-35s) and 55% of older ones (35+) have tried to influence story selection by following or unfollowing, muting or blocking, or changing other settings.

For most people – across ages and countries – the key objective is not to make the feed more fun or more interesting but rather to make it more reliable, less toxic, and with greater diversity of views (see chart below). Yet, despite these clearly stated preferences, social media companies competing for attention and advertising continue to optimise for engagement, with less attention to increasing quality, reliability, or diversity.

PROPORTION THAT SAY THEY ARE TRYING TO ACHIEVE EACH WHEN CHANGING WHAT NEWS AND INFORMATION THEY SEE ON ONLINE PLATFORMS – SELECTED COUNTRIES



Q2_Algorithms_2023. You said that you try to change what news and information you see on online platforms. What are you trying to achieve? Please select all that apply. *Base: All those that tried to change what news they see via algorithms in UK = 910, USA = 1205, Germany = 996.*

None of this means that audiences prefer news selected by journalists and editors, perhaps because many see these traditional sources as also laden with agendas and biases. Indeed, for all the criticism of algorithms, it is notable that content based on previous reading/watching history is still preferred, on average, when compared with selection by journalists across all ages and segments.

Overall, these data highlight general audience dissatisfaction with how content is selected for them – and perhaps an opportunity for publishers to create something better. Many news organisations are now exploring how to mix their editorial judgement and values with algorithms in a way that delivers more relevant, reliable, and valuable content for consumers.

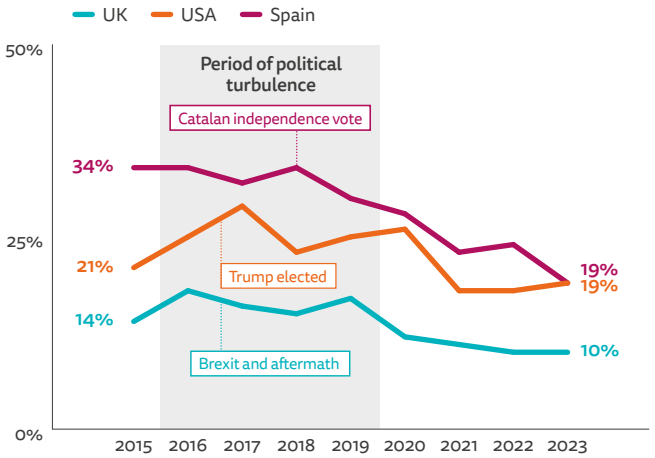
For further analysis see Section 2.1: Attitudes to Algorithms and their Impact on News

Participation in open networks is declining and becoming less representative

This year we have also explored changes in participation over time in the light of the ongoing reduction in the prominence of news on Facebook and suggestions that engagement may also be reducing in Twitter. Participation was hailed as one of the defining features of Web 2.0 (the social web), breaking with 'we-publish-you-read' approaches to journalism – part of protest movements such as the Arab Spring, #MeToo, and #BlackLivesMatter, amongst others.

We find that many measures of open participation, such as sharing and commenting, have declined across countries, with a minority of active users making most of the noise. Looking back, we can detect a period of peak sharing in some markets between 2016 and 2019, primarily driven by Facebook and by divisive events such as the election of Donald Trump in the United States, the Brexit referendum in the United Kingdom, and the vote on Catalan independence in Spain. But since then, online participation has shifted to some extent into closed networks such as WhatsApp, Signal, Telegram, and Discord, where people can have private or semi-private conversations with trusted friends in a less toxic atmosphere.

PROPORTION THAT SHARE A NEWS STORY ON SOCIAL MEDIA IN AN AVERAGE WEEK (2015-2023) – SELECTED COUNTRIES



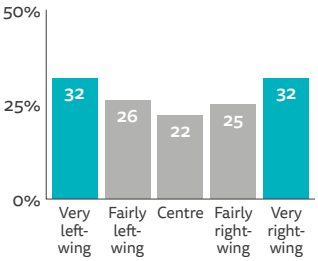
Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. *Base: Total sample in each country-year ≈ 2000.*

A further aspect of participation uncovered by our analysis is that a relatively small group of engaged users has a disproportionate influence over political and cultural debates – and that this group has become smaller and more concentrated over time. We have segmented our entire sample into those who *actively participate* in news by posting and commenting, those who mostly *reactively participate* by liking and sharing, and those who don't participate at all, a group that we call *passive consumers*.

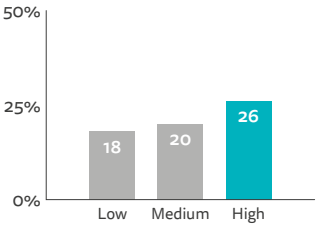
Across markets, only around a fifth (22%) are now active participators, with around half (47%) not participating in news at all. The proportion of active participators has fallen by about 10 percentage points in countries like the UK and United States since 2016. In the UK only around one in ten now actively participates in online news, but their activities often seem to heavily influence the mainstream media agenda and shape wider debates. Across countries we find that this group tends to be male, better educated, and more partisan in their political views in almost every country – the same, unrepresentative demographic profile many news media cater to.

PROFILE OF ACTIVE PARTICIPATORS – ALL MARKETS

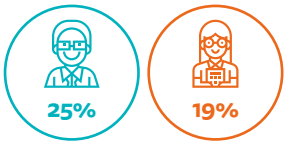
More **politically motivated**



Higher levels of **education**



More likely to be **men**



Countries with **more** active participators

Thailand	36%
Philippines	34%
India	34%

Countries with **fewer** active participators

Germany	11%
UK	10%
Japan	6%

Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. **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? **Education.** What is your highest level of education? *Base: Men/Women = 45,938/47,957; Very left-wing/Fairly left-wing/Centre/Fairly right-wing/Very right-wing = 4447/10,497/46,542/8974/3499; Low/Medium/High education = 12,522/34,950/34,182. Note: Active participators are those that comment on a news story in a social network or comment on a news story on a news website.*

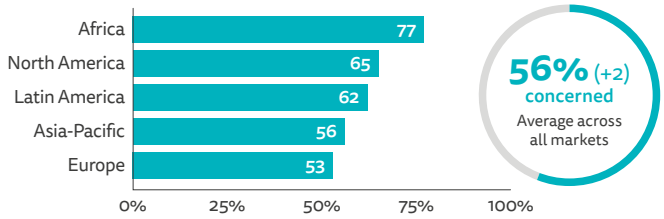
The group that participates in news has always been different from the general population, but these data suggest that online participation may have become more influenced by unrepresentative politically committed groups over the last few years as mainstream users disconnect or move some of their discussions to more private spaces. Publishers need to be aware of these changes and find ways to broaden and deepen engagement with the more passive or reactive majority.

For further analysis see Section 2.2: Unpacking News Participation and Online Engagement over Time

Misinformation and disinformation

The platform changes we have described, including the switch of attention to new networks, do not seem to be lessening public fears about misinformation and disinformation. Across markets, well over half (56%) say they worry about identifying the difference between what is real and fake on the internet when it comes to news – up 2 percentage points on last year. Those who say they *mainly* use social media as a source of news are much more worried (64%) than people who don't use it at all (50%) while many countries with the highest levels of concern also tend to have high levels of social media news use. This is not to say that social media use *causes* misinformation, but documented problems on these platforms and greater exposure to a wider range of sources does seem to have an impact on how confident people feel about the information they come across.

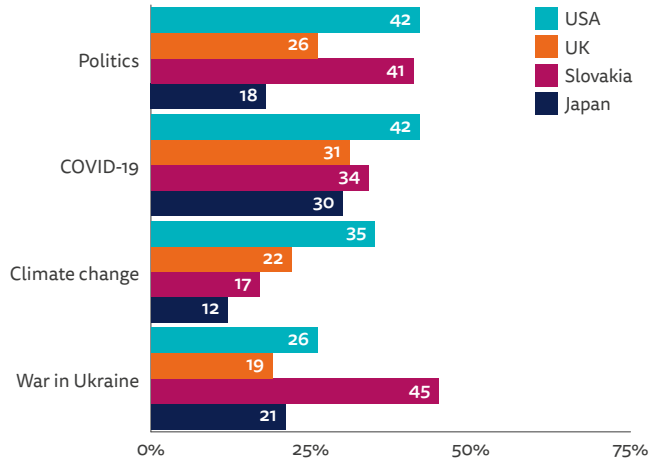
PROPORTION CONCERNED ABOUT WHAT IS REAL AND WHAT IS FAKE ON THE INTERNET WHEN IT COMES TO NEWS – SELECTED REGIONS



Q_FAKE_NEWS_1. Please indicate your level of agreement with the following statement. Thinking about online news, I am concerned about what is real and what is fake on the internet. *Base: Total sample in Africa = 6063, North America = 4231, Latin America = 12,149, Asia-Pacific = 22,477, Europe = 48,975.*

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 still widespread, along with false or misleading information about politics. In Slovakia, one of the countries bordering Ukraine, almost half of our sample said they had seen misinformation about the Ukraine conflict in the previous week, around twice the proportion that said this in the UK, United States, or Japan.

PROPORTION THAT SAY THEY SAW FALSE OR MISLEADING INFORMATION ABOUT EACH IN THE LAST WEEK – SELECTED COUNTRIES



Q_FAKE_NEWS_2021a. Have you seen false or misleading information about any of the following topics, in the last week? Please select all that apply. *Base: Total sample in each country ≈ 2000.*

Levels of perceived misinformation around climate change are around three times higher in the United States (35%) than they are in Japan (12%). Some prominent politicians, opinion writers in the media, and groups aligned with fossil fuel interests continue to disregard the scientific consensus and belittle green policies. Environmental groups say climate change denialism has been making a 'stark comeback' on social media, with misleading advertisements on Facebook and other networks and viral hashtags such as #climatescam on Twitter, which critics say has been failing to properly moderate harmful content since the takeover by Elon Musk.[8]

Platform shifts summarised

Taken together, what are we to make of these changes in the platform environment? Our reliance on social media continues to grow, but a growing variety of different platforms now competes to serve different purposes in our lives, with news often becoming less central to how they work. At the same time, we seem to be less happy about the way news content is surfaced (algorithms), the accuracy of the content (misinformation), and the quality of debate (participation). Newer platforms like Instagram and TikTok, with more visual content, are optimised better for younger users, but they often require more bespoke investment from publishers with little return in terms of traffic or revenue. With further innovation on the way, fuelled by artificial intelligence (AI) and automation, publishers will need to be more focused than ever on defining how these intermediaries can help drive new users and deeper connections whilst contributing to their core businesses.

BUSINESS PRESSURES GROW AMID DOWNTURN, SUBSCRIPTIONS STALL

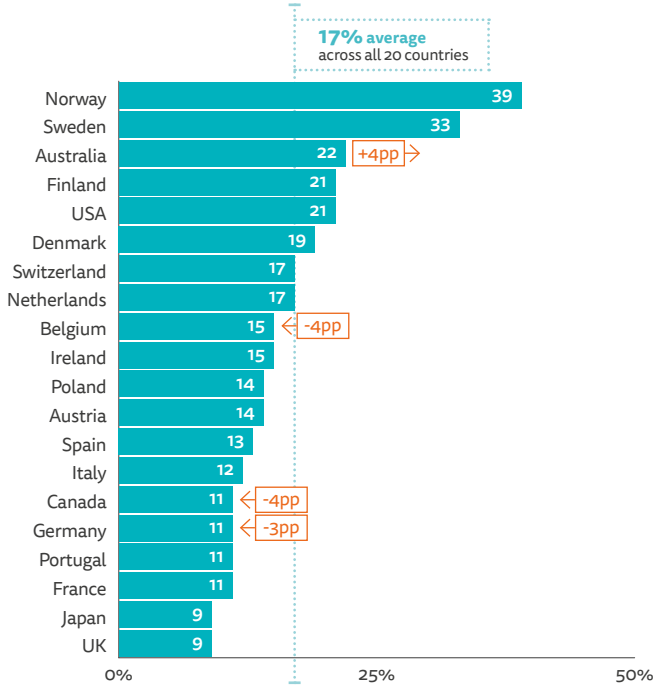
Our country pages this year (Section 3) are full of stories of industry cost-cutting, journalistic layoffs and the slimming down (or closure) of print editions due to a combination of rising costs and lower than expected advertising revenues. These pressures – along with the decline in traffic from social networks such as Facebook and Twitter – have also affected digital born brands, with the closure of BuzzFeed News and Vice Media filing for bankruptcy. These companies had pioneered a model of ad-supported, socially optimised news that had at one stage threatened to upend the industry.

Against this background, it is not surprising that many traditional publishers have been trying to refocus on recurring reader revenue models such as subscription and membership. These approaches have been a rare industry bright spot over the last few years, with upmarket newspaper brands such as the *New York Times* now attracting more than 6 million digital-only subscribers to its news products alone.[9]

The *Digital News Report* has been tracking the proportion paying for online news for almost a decade in the richer, newspaper-centric countries that have been leading this trend. We do not report subscription numbers in African countries, India, or a few other markets where we feel the sample is not sufficiently representative. As in previous years, we have focused our reporting on a basket of 20 countries where publishers have been most active and where the concept of paying for online news is well understood.

[8] https://www.theverge.com/2023/1/19/23562269/climate-change-denial-social-media-meta-facebook-instagram-twitter
[9] 6.3m news subscribers in 4th quarter of 2022. https://www.statista.com/statistics/315041/new-york-times-company-digital-subscribers/

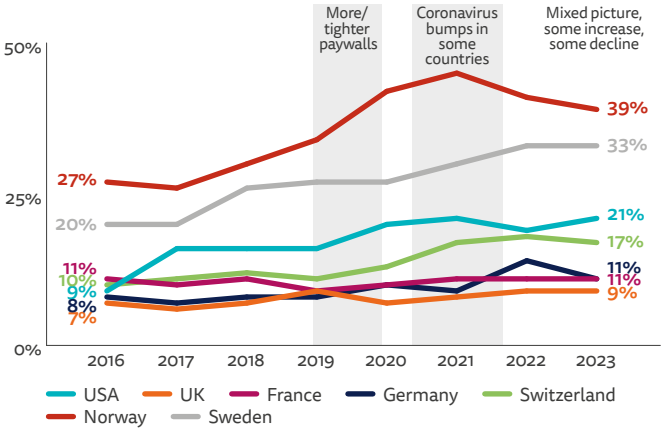
PROPORTION THAT PAID FOR ONLINE NEWS IN THE LAST YEAR – SELECTED COUNTRIES



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

In these markets, the average proportion making any online news payment has remained at 17% for the second year in a row – raising questions about whether we may have, for now, reached the peak of the subscription trend, at least for current subscription offers. There are statistically significant falls in Belgium (-4) and Canada (-4) and a rise in Australia (+4) but otherwise there is little movement in headline rates compared with last year, and our over-time chart (below) seems to confirm a levelling off process underway. The countries with the biggest proportion paying for news, with the exception of the United States, tend to be smaller markets with a high concentration of publishers, most of which introduced paywalls around the same time.

PROPORTION THAT PAID FOR ONLINE NEWS IN THE LAST YEAR (2016-2023) – SELECTED COUNTRIES



Q7a. Have you paid for online news content, or accessed a paid-for online news service in the last year? (This could be a digital subscription, combined digital/print subscription, a donation, or one-off payment for an article or app or e-edition). *Base: Total sample in each country-year ≈ 2000. Please note the question may under-represent newspaper purchase in any high-subscription countries, as many of those who pay quarterly/annually probably would have answered no. Year-on-year comparisons should be valid.*

As in previous years, a *winner takes most* dynamic persists in many markets. In Finland half of all ongoing online news subscribers (53%) pay for *Helsingin Sanomat*, the country's paper of record. In the United States, the *New York Times* (36% of ongoing subscribers) has stretched its lead over the *Washington Post* and the *Wall Street Journal* and is building a significant subscription base in other English-speaking markets such as Canada and Ireland. Elsewhere we find subscriptions are primarily national and tend to be widely spread across a range of publications.

PROFILE OF ONGOING DIGITAL NEWS SUBSCRIBERS – SELECTED MARKETS

Country *Top national titles*	% paying	Median number of subscriptions	% subscribe to regional/ local titles	% subscribe to foreign titles
Norway *VG, Aftenposten, Dagbladet*	**39**	**1**	50	4
Sweden *Aftonbladet, Dagens Nyheter, Expressen*	**33**	**1**	40	6
Australia *Australian, Guardian Australia, Herald Sun, SMH*	**22**	**2**	54	11
USA *New York Times, Washington Post*	**21**	**2**	19	22
Finland *Helsingin Sanomat, Iltalehti Plus*	**21**	**1**	40	3
Denmark *Berlingske, Politiken, Ekstrabladet*	**19**	**1**	19	4
Switzerland *Tages-Anzeiger, NZZ*	**17**	**1**	43	15
Netherlands *De Telegraaf, AD, Volkskrant*	**17**	**1**	53	3
Belgium *Het Laatste Nieuws, Le Soir, De Morgen*	**15**	**1**	20	4
Ireland *Irish Times, Irish Independent, New York Times*	**15**	**1**	6	48
Austria *Die Presse, Kronen Zeitung, Der Standard*	**14**	**1**	15	6
Spain *El País, El Mundo, La Vanguardia, Marca*	**13**	**2**	9	6
Italy *Corriere della Sera, La Repubblica*	**12**	**1**	17	8
Canada *Globe & Mail, Toronto Star, New York Times*	**11**	**1**	12	39
Germany *Bild, Die Welt, Der Spiegel, FAZ, SZ*	**11**	**1**	25	11
Portugal *Público, Expresso, Correio da Manhã, Observador*	**11**	**1**	8	10
France *Le Monde, Le Figaro, Mediapart*	**11**	**2**	19	5
Japan *Nikkei, Asahi Shimbun Digital*	**9**	**1**	n/a	n/a
UK *Telegraph, Times of London, Guardian*	**9**	**1**	10	4

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? Please select all that apply. *Base: Ongoing online news subscribers ranging from Norway = 589 to UK = 153.*

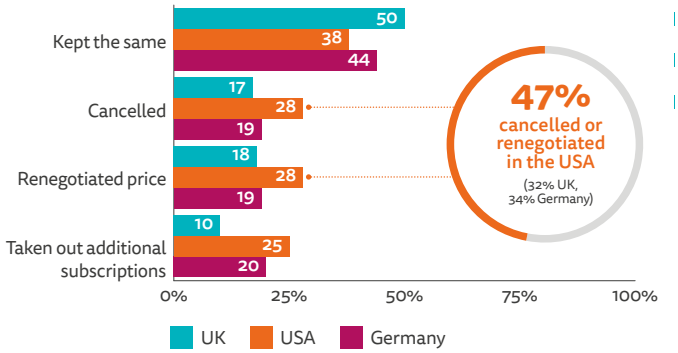
In most countries, the majority of subscribers only pay for one publication, but in the United States around half (56%) pay for two or more – often a national and local paper combination. Other second subscriptions include political and cultural magazines such as the *Atlantic* and the *New Yorker*, partisan digital outlets such as the Epoch Times and passion-based titles such as the Athletic. We also see growing levels of payment for platform-based news subscription products such as Apple News+ (18% of US subscribers). We have started to see more second subscriptions in other markets including Australia, Spain, and France, perhaps due to the greater availability of low-price trial offers.

In the United States 8% of subscribers pay for a newsletter written by an individual journalist or influencer and 5% pay for a podcaster or YouTuber. This trend is still largely confined to the US.

The impact of the cost-of-living crisis on news subscriptions

Although headline levels are largely unchanged, we find a large amount of underlying change, much of it driven by cost pressures. Around one in five news subscribers (23% on average) say they have cancelled at least one of their ongoing news publications, while a similar number say they have negotiated a cheaper price (23%) At the same time, others have taken up new subscriptions, often using a cheap trial offer. Given the relatively small number of respondents these findings are based on, and the very real variation from publisher to publisher and market to market, the findings cannot necessarily be generalised, but they clearly show that, while the headline number of subscribers have stayed the same, there is often a considerable amount of churn at a title level.

PROPORTION OF ONGOING ONLINE NEWS SUBSCRIBERS THAT HAVE DONE EACH IN THE LAST YEAR – SELECTED COUNTRIES



Q2_Pay_2023_sub. Still thinking about paying for online news ... and thinking specifically about ongoing online news subscriptions ... which, if any, of the following have you done in the last year? Please select all that apply. *Base: Ongoing online news subscribers in Germany = 155, USA = 382, UK = 155.*

In qualitative responses, the cost-of-living crisis emerged as the main stated reason for cancellation.

> ***I was spending too much on online subscriptions. I wanted to cut some cost; mainly I just couldn't afford it anymore.***
>
> *F, 24, USA*

> ***With the cost-of-living crises, I cannot afford more than one subscription.***
>
> *F, 33, UK*

Across countries, however, the underlying reason for cancelling was that people simply weren't using the subscription enough to justify the cost or they didn't have enough time. At a fundamental level, news media that struggle to get people to pay attention to them will have an even harder time convincing people to pay.

> ***I had more subscriptions than I had time to read so I cut the most expensive (NY Times) – I didn't think I needed as many as I had.***
>
> *F, 61, USA*

As with TV streaming subscriptions, we found widespread juggling of trials and special offers to reduce outgoings. But for many the jump from a trial to a full-price subscription was a critical time to reflect on the value.

> ***The deal ended, so it became more expensive to me, so I decided to cut the cost. I also wasn't really using it as much since I get so much for free on Twitter.***
>
> *M, 27, USA*

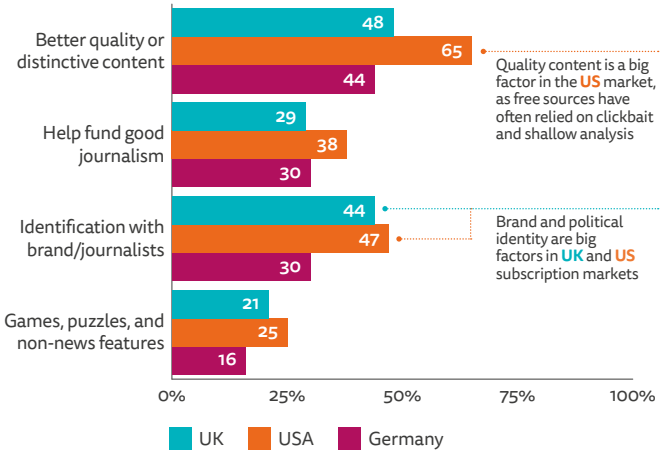
> ***My free trial ran out, but I resubscribed when I could find another free trial.***
>
> *M, 39, USA*

According to our data, around half of subscribers are *maintained subscribers*, who are confident about value and are unlikely to churn. These tend to be older and less price-sensitive customers. But that leaves a significant proportion of *price-sensitive subscribers* who are shopping around for deals and regularly reassessing value. This suggests that churn is likely to be a major problem this year and beyond.

Reasons to subscribe to a news publication

Across markets, the most important stated reason to subscribe is to get access to better quality or more distinctive journalism (51% on average, 65% in the US) than can be obtained for free. A second reason, which is particularly prevalent in the United States, is to help fund good journalism, perhaps because European consumers feel they have already paid for this though their taxes or public media licence fees. Identification with the brand and its politics is a very important reason to subscribe in the UK and US, but much less important in Germany. Finally, games and member benefits are important factors for some, along with a good user experience for the website and app.

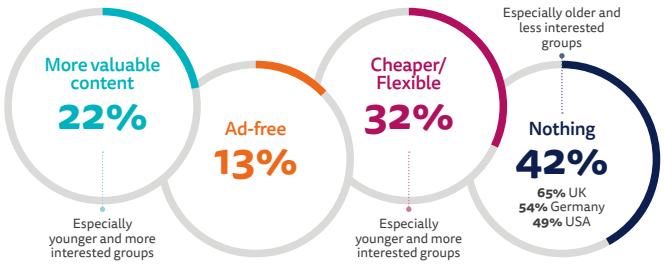
PROPORTION THAT SAY EACH ARE THE MOST IMPORTANT REASONS WHY THEY PAID FOR ONLINE NEWS IN THE LAST YEAR – SELECTED COUNTRIES



Q1_Pay_2023. You said that you have paid for access to online news in the last year ... What are the most important reasons for this? Please select all that apply. *Base: Ongoing online news subscribers in Germany = 155, USA = 382, UK = 155.*

This year we wanted to explore more about those who do not currently pay for online news across our 20 markets to see if there was anything that could persuade them to do so. Encouragingly, some said they might pay if the content was more distinctive (22%), if there was an ad-free option (13%) or if the price was cheaper or provided more flexibility (32%). On the other hand, many more people (42%) said that nothing would persuade them to pay – as many as 65% of current non-payers in the UK and 54% in Germany.

PROPORTION OF NON-SUBSCRIBERS THAT SAY EACH WOULD MOST ENCOURAGE THEM TO PAY – AVERAGE OF SELECTED COUNTRIES



Q4_Pay_2023. You say you don't currently subscribe or donate to an online newspaper or other news service. Which of the following, if any, would most encourage you to pay? Please select all that apply. *Base: Those that don't subscribe to online news in USA, UK, Germany, France, Italy, Spain, Portugal, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Poland, Japan, South Korea, Australia, and Canada = 33,460.*

Overall, the biggest opportunity to attract new subscribers lies in reducing the price, for example with special offer trials, or differential pricing, but this also carries significant risks around long-term profitability.

More flexibility is another theme that came out strongly in our qualitative work as well as our survey. Many potential subscribers, especially younger people, do not want to be 'tied down' by one subscription. Instead, they want to access multiple brands with little or no friction for a fair price.

> ***I prefer to choose which services I want and not be limited to a particular brand.***
>
> *F, 55+, UK, lapsed subscriber*

Schibsted in Norway now offers six national and local newspapers, 44 magazines, and exclusive podcasts in its all-access package, which costs just a bit more than a single publication subscription. Amedia offers more than one hundred titles including local, premium sports and podcasts in its +Alt subscription (below). It is early days, but this bundle has been taken up by 4% of ongoing subscribers in Norway, according to our latest data, and we see emerging examples in other Nordic and Benelux markets.

+alt

All-access subscriptions are proving popular



The New York Times

The New York Times is bundling games with news

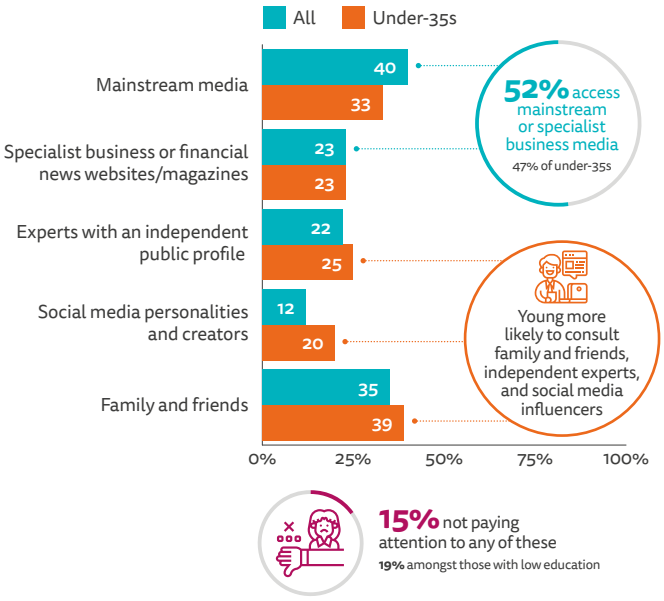
Our detailed research this year across markets highlights how important news subscriptions are to some, but also how fragile the arrangement is for others. In countries such as the UK and US, many people subscribe based on either a long-standing relationship, or the sense that the outlet speaks *to* them and speaks *for* them. This brand identification is closely linked to the content itself, raising questions about whether paid models may encourage more partisan editorial approaches.

Beyond this, respondents need to believe they are getting value for money, especially in the current economic climate. They also need to be sure that the content is exclusive, curated, and that it is unavailable for free. But they do not want to pay over the odds. Larger, more expensive bundles appeal to those already interested in news, but may be less attractive to many casual news users.

Economic downturn and the role of the media

The current economic crisis, which has brought rampant inflation, job insecurity, and rising levels of poverty, has affected the vast majority. Across markets, three-quarters (77%) of people say they have been affected a great deal or somewhat by the cost-of-living crisis, with only a fifth (20%) saying they have been largely unaffected. Our data show that over half (52%) turn to mainstream media or specialist sources for information about personal finances and/or the economy, with social media personalities and creators (12%) playing a relatively minor role. This reinforces previous data showing that traditional media play a more important role when times get tough.

PROPORTION THAT SAY THEY PAY A LOT OF ATTENTION TO EACH FOR NEWS ABOUT PERSONAL FINANCES AND/OR THE WIDER ECONOMY (BY AGE) – AVERAGE OF SELECTED MARKETS



Q2_Finance_2023m. Thinking about news or information related to your personal finances and/or the wider economy ... which of the following sources, if any, do you pay a lot of attention to? Please select all that apply. *Base: Total sample/U35s in all markets except Malaysia, Chile, Mexico, South Africa, Kenya, Philippines, Colombia, Indonesia, Nigeria, Peru, and Thailand = 71,405/18,398.*

But as with other media topics we have explored in the past, we find that younger groups are much more likely to rely on social media and influencers compared with over-55s. They are less likely to pay attention to mainstream media on finance topics. Family and friends are also seen as a key source of information by young and old.

In some countries, personal finance experts who often run their own websites or channels are building significant followings. In the UK, for example, the founder of moneysavingexpert.com, Martin Lewis, has become a household name – dispensing practical advice on how to make money go further as well as lobbying the government for policy changes. But it is important to note that, as a result of his engaging personality, he has been commissioned to present mainstream shows on television and radio as well as his own podcasts and newsletters. The following pictures highlight some of the other (mainly male) independent experts who have built a personal following across channels including social media.

PROPORTION THAT PAY ATTENTION TO INDEPENDENT FINANCE EXPERTS THAT NAMED EACH – SELECTED COUNTRIES



77% mention **Martin Lewis** in the UK



6% mention **Dave Ramsey** in the US



4% mention **Charles Gave** in France

Finance_Open_2023. You say that you pay a lot of attention to experts with an independent public profile (e.g. their own social channels or TV shows) for news or information related to your personal finances and the wider economy. Who do you pay attention to? *Base: All that say they pay attention to experts in UK = 510, USA = 425, France = 349. Note: Open-ended question. Respondents could type in up to three names.*

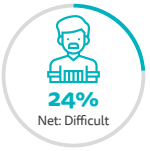
Although people rely greatly on mainstream media for finance and economic news, a significant proportion say they find it difficult to understand. This is especially true for people who need the information most. Overall, around a third (30%) found it difficult, with those most affected by the cost-of-living crisis, women, and those with lower income and education levels finding the news more difficult both to understand and to apply in their daily lives.

PROFILE OF THOSE THAT FIND NEWS ABOUT FINANCE AND THE ECONOMY DIFFICULT TO UNDERSTAND – ALL MARKETS



30% find news about finance **difficult to understand**

Gender

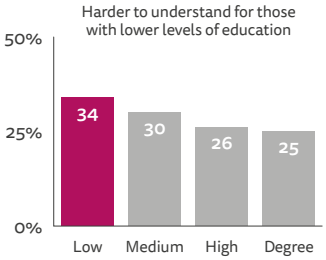


24% Net: Difficult

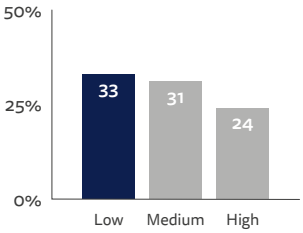


35% Net: Difficult

Education



Income



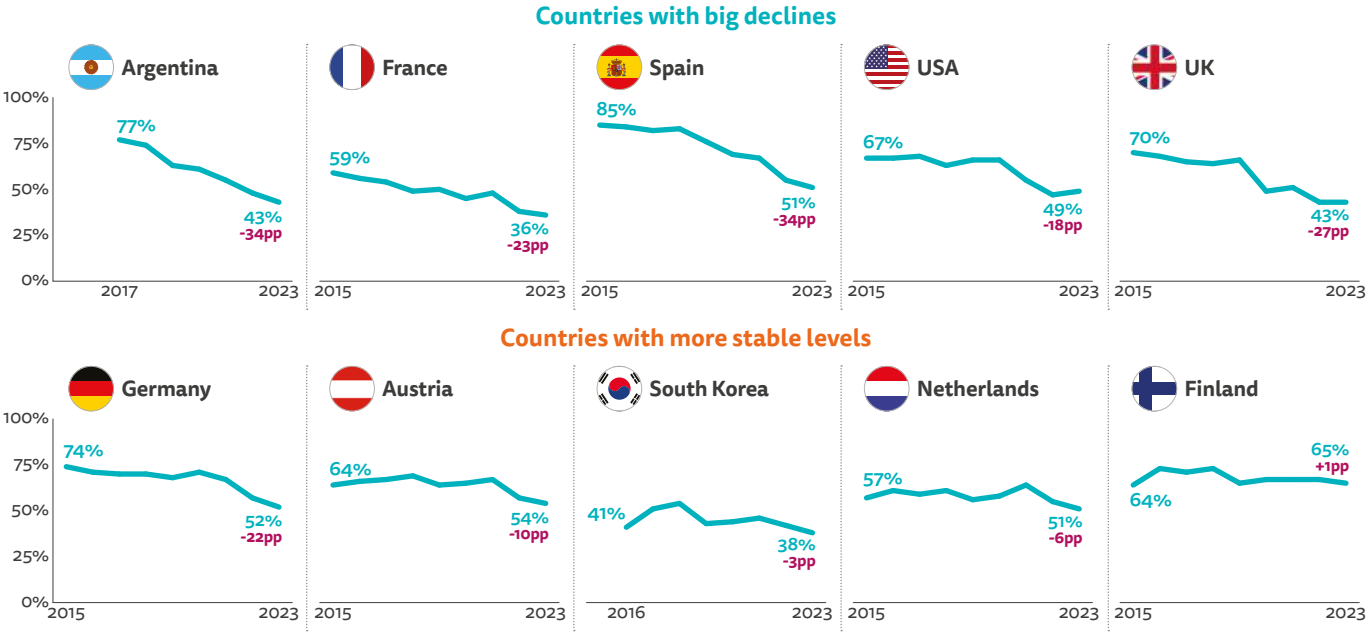
Q3_Finance_2023_1. How easy or difficult do you find it to understand news about finance and the economy? **Education.** What is your highest level of education? **Income.** What is your gross household income? *Base: Total sample = 67,344, Men/Women = 32,711/34,633, Low/Medium/High education = 12,671/29,722/24,951, Low/Medium/High household income = 15,343/26,649/16,470 in all markets except Malaysia, Brazil, Argentina, Chile, Mexico, South Africa, Kenya, Philippines, Colombia, Indonesia, Nigeria, Peru, and Thailand.*

INTEREST IN NEWS CONTINUES TO DECLINE, FUELLING DISENGAGEMENT AND SELECTIVE NEWS AVOIDANCE

Unlike the COVID-19 pandemic, neither the cost-of-living crisis nor the ongoing Ukraine war has led to a sustained upsurge of news consumption. Across a large group of countries, our survey data show a decline in weekly consumption across different news sources over the last year and lower interest in the news overall (see chart below).

Self-declared interest in news is lower amongst women and younger people, with the falls often greatest in countries characterised by high levels of political polarisation. Some markets, with stable, well-funded media and high trust in institutions, such as Finland and the Netherlands, seem to have largely bucked the trend, while previously stable markets such as Austria and Germany are starting to be affected.

PROPORTION THAT SAY THEY ARE VERY OR EXTREMELY INTERESTED IN NEWS (OVER TIME) – SELECTED COUNTRIES



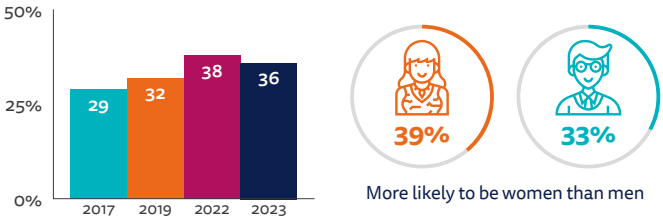
Q1c. How interested, if at all, would you say you are in news? *Base: Total sample in each country-year ≈ 2000. Finland in 2015 = 1509.*

These declines in news interest are reflected in lower consumption of both traditional and online media sources in most cases. The proportion that say they did not consume *any* news in the last week from traditional or online sources (TV, radio, print, online, or social media) has increased again this year across countries. The highest proportion of 'disconnected' users can be found in Japan (17%), the United States (12%), Germany and the UK (9% each). But in countries like Finland (2%) a much smaller proportion are disengaged.

Addressing selective news avoidance

Last year's report highlighted the problem of selective news avoidance, especially with some hard-to-reach groups. Publishers have spoken openly about falling web traffic and the difficulty of engaging audiences with subjects such as the war in Ukraine and climate change.[10] Our data provoked much debate about the precise nature of news avoidance and this year we have explored this further, as well as looking at what can be done to address it. In this year's data we find continued high levels of selective avoidance (people who say they actively do it sometimes or often), with the headline rate at 36%, 7 percentage points above the figure in 2017 but two points lower than last year. It was down in the UK and Brazil but up some other countries, such as Greece, Bulgaria, and Poland.

PROPORTION THAT SAY THEY SOMETIMES OR OFTEN ACTIVELY TRY TO AVOID THE NEWS (2017-2023) – ALL MARKETS



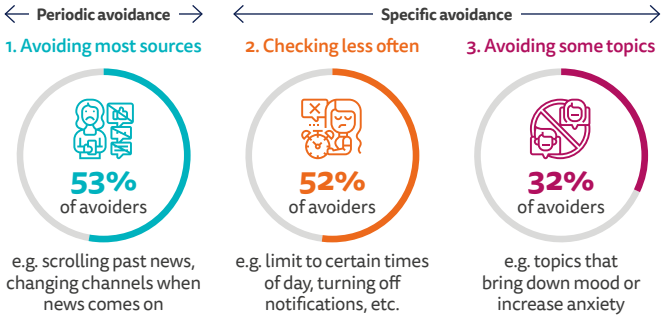
Highest levels		Lowest levels	
Greece	57% (+6)	Finland	21%
Bulgaria	57% (+10)	South Korea	20% (-6)
Argentina	46%	Denmark	19%
Poland	44% (+3)	Taiwan	17% (-5)
UK	41% (-5)	Japan	11% (-3)

Q1di_2017. Do you find yourself actively trying to avoid news these days? *Base: Total sample in each country-year ≈ 2000, Men/Women in 2023 = 45,938/47,957. Note: Number of markets grew from 36 in 2018 to 46 from 2021 onwards. Markets listed in online methodology.*

This year, for the first time, we asked about the *different ways* that people avoid the news and found that around half of avoiders (53%) were trying to do so in a *broad-brush* or *periodic* way – for example, by turning off the radio when the news came on, or by scrolling past the news in social media. This group includes many younger people and those with lower levels of education.

A second group tends to avoid news by taking more *specific actions*. This may involve checking the news less often (52% of avoiders), for example by turning off mobile notifications, or not checking the news last thing at night, or by avoiding certain news topics (32% of avoiders) such as the war in Ukraine or news about national politics.

PROPORTION OF NEWS AVOIDERS THAT SAY THEY DO EACH – ALL MARKETS



Avoidance_behaviours_2023. You said that you try to actively avoid news. Which of the following, if any, do you do? Please select all that apply. *Base: Those who sometimes or often avoid the news in all markets = 33,469.*

In our qualitative study this year we've heard more evidence about the circumstances that give rise to this selective news avoidance, even by those who are otherwise very interested. Certain news stories that are repeated excessively or are felt to be 'emotionally draining' are often passed over in favour of something more uplifting.

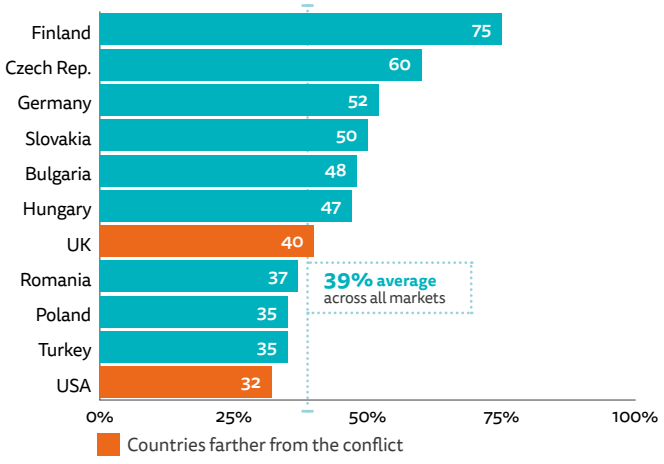
> ***I try to avoid stories relating to the UK economy currently as it is just depressing. I'm probably choosing to read more light-hearted stories than I used to at the moment.***
> *M, 51, UK*

> ***Turning my back on news is the only way I feel I can cope sometimes. I have to consciously make the effort to turn away for the sake of my own mental health.***
> *F, 42, UK*

Avoidance of the war in Ukraine is widespread

Amongst avoiders, almost four in ten (39%) said they had avoided news on the war in Ukraine, followed by national politics (38%), issues around social justice (31%), news about crime (30%), and celebrity news (28%). Selective avoidance of Ukraine news was highest in many of the countries closest to the conflict, reinforcing findings from our additional survey last year, soon after the war had begun.[11]

PROPORTION OF NEWS AVOIDERS THAT SAY THEY AVOID NEWS ABOUT THE WAR IN UKRAINE – SELECTED MARKETS



Avoidance_topics_2023. You said that you try to actively avoid specific news topics. Which of the following news topics are you trying to avoid? Please select all that apply. *Base: Those who sometimes or often avoid news and avoid specific news topics in UK = 260, USA = 231, Germany = 210, Finland = 203, Poland = 320, Czech Republic = 243, Hungary = 228, Romania = 226, Slovakia = 226, Bulgaria = 360, Turkey = 292.*

[10] 72% of industry executives said they were worried or very worried about avoidance in *Journalism, Media, and Technology Trends and Predictions 2023* (Newman 2023).
[11] https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2022/perceptions-media-coverage-war-Ukraine

Our data may not suggest a lack of interest in Ukraine from nearby countries but rather a desire to manage time or protect mental health from the very real horrors of war. It may also be that consumers in these countries already consider themselves to be well-enough informed on Ukraine, with extensive and detailed coverage across all channels, including via social media.

DIFFICULT IMAGES FROM UKRAINE ARE TURNING SOME AWAY FROM NEWS



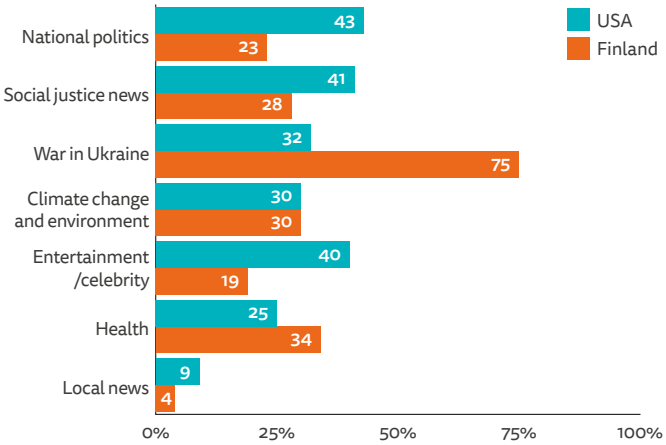
Destruction of Mariupol in the first few months of the war.

Bitter political debates are another key factor driving avoidance

Comparing Finland with a politically polarised country such as the United States (see next chart) that is less affected by the war, we find a very different pattern of topic avoidance. In the United States, we find that consumers are more likely to avoid subjects such as national politics and social justice, where debates over issues such as gender, sexuality, and race have become highly politicised. By contrast, there is very little active avoidance of local news in either country.

> ***American politics are pretty toxic these days. I find sometimes that I have to disconnect from stories that just make me angry.***
>
> *F, 61, United States*

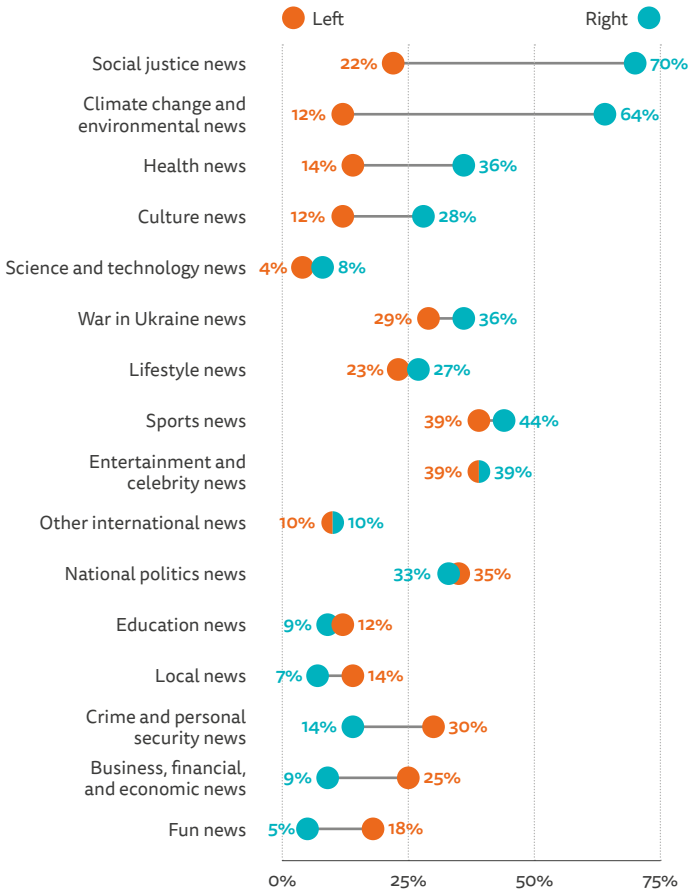
PROPORTION OF NEWS AVOIDERS THAT SAY THEY AVOID NEWS ABOUT EACH TOPIC – USA AND FINLAND



Avoidance_topics_2023. You said that you try to actively avoid specific news topics. Which of the following news topics are you trying to avoid? Please select all that apply. *Base: Those who sometimes or often avoid news and avoid specific news topics in USA = 231, Finland = 203.*

For some people, bitter and divisive political debates are a reason to turn off news altogether, but for some political partisans, avoidance is often about blocking out perspectives you don't want to hear. When splitting topic-based avoidance by political orientation, we find those on the right in the United States are five times more likely to actively avoid news about climate change than those on the left and three times more likely to avoid news about social justice issues such as gender and race. Those on the left are more likely than those on the right to avoid news about crime or business and finance.

PROPORTION OF NEWS AVOIDERS THAT SAY THEY AVOID NEWS ABOUT EACH TOPIC – USA



Avoidance_topics_2023. You said that you try to actively avoid specific news topics. Which of the following news topics are you trying to avoid? Please select all that apply. *Base: Those who sometimes or often avoid news and avoid specific news topics on the Left = 103, Right = 76. Note: Differences of less than +/-10pp should be treated with caution due to small base sizes.*

Addressing news avoidance

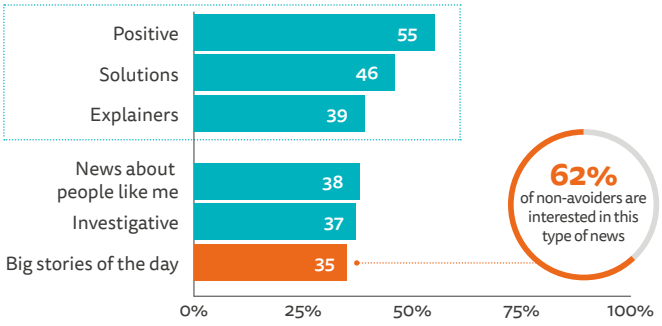
Evidence that some people are turning away from important news subjects, like the war in Ukraine, national politics, and even climate change is extremely challenging for the news industry and for those who believe the news media have a critical role in informing the public as part of a healthy democracy.

Many news organisations are looking to tackle both periodic and specific avoidance in a variety of ways. Some are looking to make news more accessible for hard-to-reach groups, broadening the news agenda, commissioning more inspiring or positive news, or embracing constructive or solutions journalism that give people a sense of hope or personal agency. In our survey this year, we asked respondents about their interest in these different approaches.

At a headline level, we find that avoiders are much less interested in the latest twists and turns of the big news stories of the day (35%), compared with those that never avoid (62%). This explains why stories like Ukraine or national politics perform well with news regulars but can at the same time turn less interested users away. Selective avoiders are less interested in all types of news than non-avoiders but in relative terms they do seem to be more interested in positive or solutions-based news. Having said that, it is not clear that audiences think much about publisher definitions of terms such as positive or solutions journalism. Rather we can interpret this as an oft-stated desire for the news to be a bit less depressing and a bit easier to understand.

> ***Generally, I want a lighter tone. It's good for my soul and makes me less anxious.***
>
> *M, 55, Germany*

PROPORTION OF NEWS AVOIDERS THAT SAY THEY ARE INTERESTED IN EACH TYPE OF NEWS – AVERAGE OF SELECTED MARKETS



News_interest_2023. How interested are you, if at all, in the following types of news? *Base: Those who sometimes or often avoid the news in all markets except Turkey, Malaysia, Argentina, Chile, Mexico, South Africa, Kenya, Philippines, Colombia, Indonesia, Nigeria, Peru, and Thailand = 22,467.*

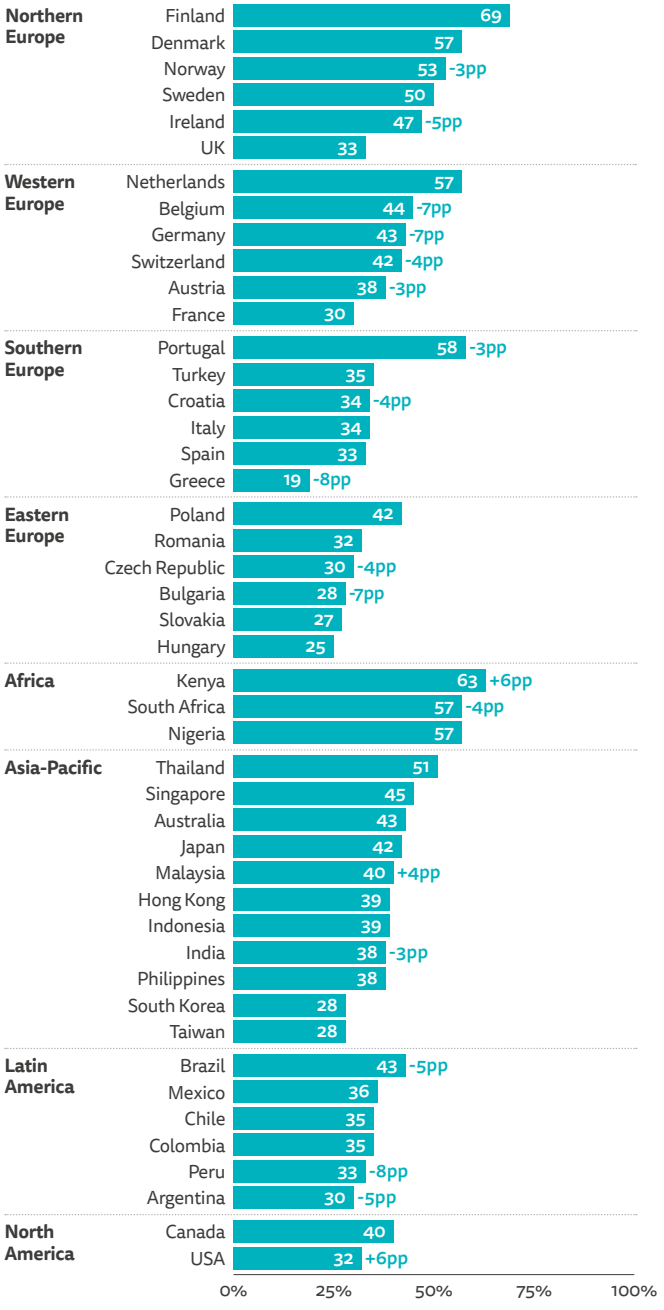
There are no simple solutions to what is a multifaceted story of disconnection and low engagement in a high-choice digital environment, but our data suggest that less sensationalist, less negative, and more explanatory approaches might help, especially with those who have low interest in news. Of course, what people *say* doesn't always match what they *do*, and other research reminds us that in practice we are often drawn towards more negative and emotionally triggering news (Robertson et al. 2023). This may be true in the moment, but over time it seems to be leaving many people empty and less satisfied, which may be undermining our connection with and trust in the news.

Trust in the news continues on a downward path with notable exceptions

Across markets, overall trust in news (40%) and trust in the sources people use themselves (46%) are down by a further 2 percentage points this year. As in previous years, we find the highest trust levels in countries such as Finland (69%) and Portugal (58%), with lower trust levels in countries with higher degrees of political polarisation such as the United States (32%), Argentina (30%), Hungary (25%), and Greece (19%).

However, the United States has seen a 6pp increase in news trust in the last year as politics has become a bit less divisive under Joe Biden's presidency. Meanwhile, trust in Greece is now the lowest in our survey amid heated discussions about press freedom and a wiretapping scandal involving prominent politicians, businessmen, and journalists.

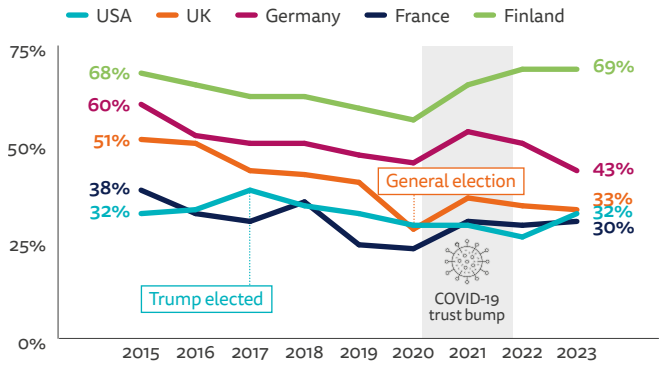
PROPORTION THAT TRUST MOST NEWS MOST OF THE TIME – ALL MARKETS



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).*

Germany has also seen a significant fall in trust in the news (-7pp) in the wake of a new government, concerns about energy security, and the war in Ukraine, though a closer examination shows the number essentially returning to pre-COVID-19 levels. Indeed, through the rear-view mirror, the COVID-19 trust bump is clearly visible in the following chart, though the direction of travel afterwards has been mixed. In some cases (e.g. Finland), the trust increase has been maintained, while in others the upturn looks more like a blip in a story of continued long-term decline. As always, it is important to underline that our data are based on people's perceptions of how trustworthy the media, or individual news brands, are. These scores are aggregates of subjective opinions, not an objective measure of underlying trustworthiness, and changes are often at least as much about political and social factors as narrowly about the news itself.

PROPORTION THAT TRUSTS MOST NEWS MOST OF THE TIME (2015–2023) – SELECTED COUNTRIES



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 country-year ≈ 2000. Finland in 2015 = 1509.*

Media criticism and its impact on trust

One potential contributing factor to low trust has been widespread and forthright criticism of the news media from a range of different sources. Digital and social media have provided much-needed accountability for news media, with articles and commentaries scrutinised for accuracy, hypocrisy, and bias. But other criticisms are less fair, coloured by political agendas and often forthrightly expressed by activists or special interest groups. Political polarisation hasn't helped, and many of our country pages (Section 3) carry examples of verbal abuse, co-ordinated harassment of individual journalists and independent media, and, in some cases, physical attacks against journalists. Looking across our entire dataset, we find a correlation between low trust and media criticism. Some of the highest reported levels of media criticism are found in countries with highest levels of distrust, such as Greece, the Philippines, the United States, France, and the United Kingdom. The lowest levels of media criticism are often in those with higher levels of trust, such as Finland, Norway, Denmark, and Japan.

On average, politicians are most often cited by respondents for their criticisms of the media, followed by ordinary people. This is particularly the case in the United States (58%), where some leading politicians regularly deploy phrases like 'fake news media' to deflect accountability reporting and mobilise loyalists. Commentators on politically polarised cable TV outlets also routinely attack other news organisations with media-critical segments.

Politicians and activists are seen as a main source of media criticism in the Philippines (46%), where journalists critical of the government are routinely branded communists or terrorists. In Mexico, President López Obrador, known as AMLO, carries a section in his morning news conferences where he routinely exposes so-called 'fake stories' published by the mainstream press.

For further information see Section 3, relevant country pages: Philippines, Mexico

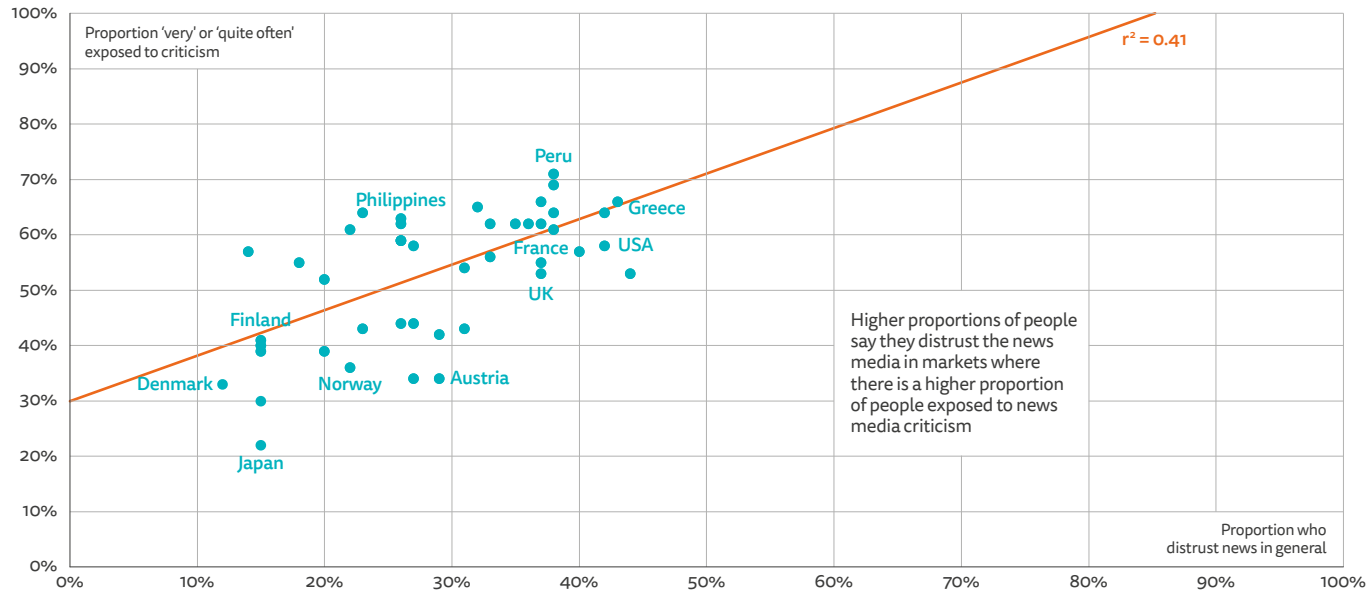


Attacks on journalists are on the rise in the Philippines.

In terms of where people see or hear media criticism, we find social media (49%) cited most often, followed by chats with people offline (36%) and then other media outlets (35%) such as television and radio. The bad-mouthing of journalists is not new, but attacks can now be amplified more quickly than ever before through a variety of digital and social channels in ways that are often closely co-ordinated, sometimes paid for, and lacking in transparency. Media criticism has become a key part of the political playbook, a way to deflect criticism and intimidate investigations – and these tactics often land on fertile ground.

For further analysis see Section 2.3: Sources and Drivers of News Media Criticism

CORRELATION BETWEEN EXPOSURE TO NEWS MEDIA CRITICISM AND DISTRUST IN NEWS – ALL MARKETS



Q1_Criticism_2023. How often, if at all, do you see or hear people criticising journalists or the news media in <market>? **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 ≈ 2000.*

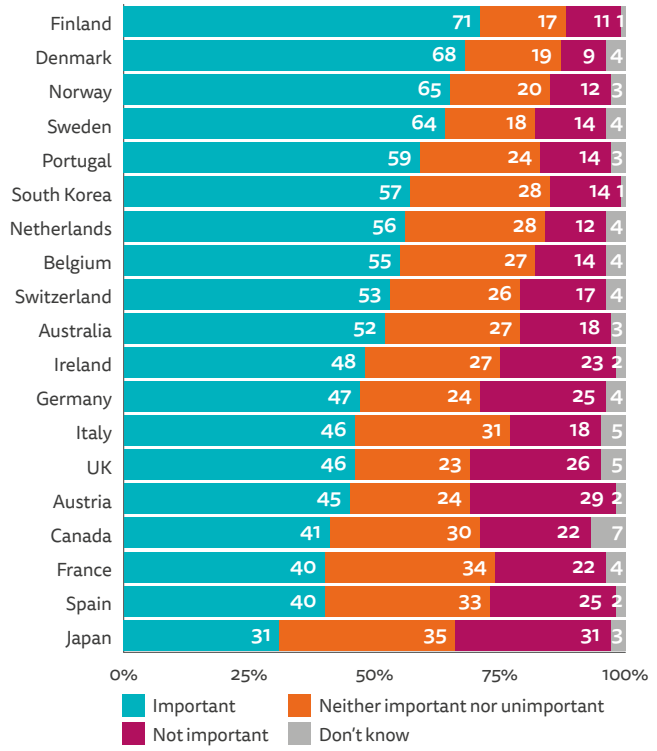
Public service news media under pressure

In recent years, public service media (PSM) have been one of the objects of media criticism, often from politicians, activists, and alternative media on the right, but also from commercial media who feel they provide unfair competition in the digital world. Increasingly polarised debates have made it harder to deliver news services that are seen to be impartial by all parts of society, while falling reach for traditional broadcast services has increased pressure on funding models whose justification is the provision of universal services.

In the last year, Austria's public broadcaster, ORF, has been ordered to cut over €300m by 2026 as the government looks set to change its funding model. In the UK, the BBC has merged its global and national 24-hour news channels after a licence fee freeze and has faced a new crisis over impartiality. A corruption scandal in Germany has undermined confidence in public media there, and the Swiss public broadcaster, SRG SSR, is due to face a new referendum which will propose major funding reductions. Against this background, we wanted to get a sense of how important audiences still feel public media news is for them and for society. We have focused on around 20 public media organisations in Western Europe and Asia-Pacific that are generally seen as being relatively independent of government.

In almost every country covered, more people say public service media are important than unimportant. It is little surprise that the perceived importance is highest in Nordic countries, small territories with a unique language and culture to protect, and public service media that many observers regard as among the best at delivering on their remit in a changing media environment. Public news broadcasters are seen as less important in Southern Europe, though their importance to society is rated a few points higher in every country.

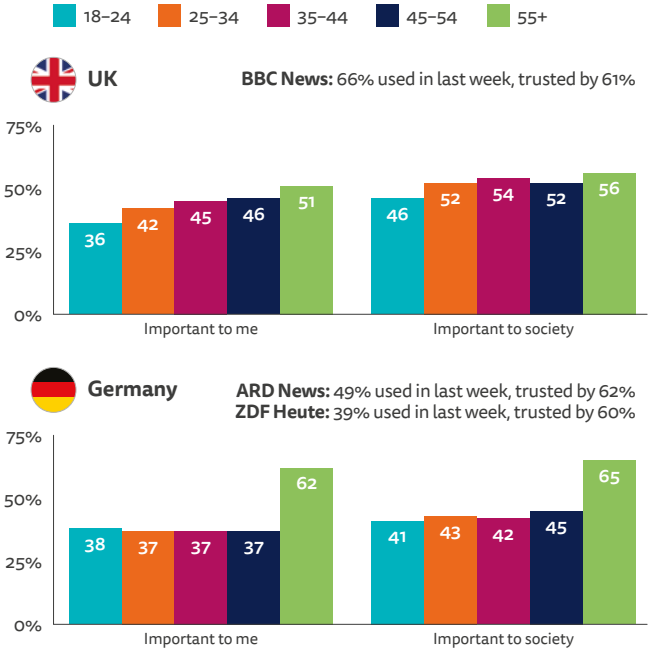
PROPORTION THAT SAY PUBLIC SERVICE MEDIA ARE IMPORTANT TO THEM PERSONALLY – SELECTED COUNTRIES



Q1_PSM_2023g_1. 'How important, or not, are publicly funded news services such as <brand> to you personally? *Base: Total sample in each country ≈ 2000.*

Our research suggests that the experience of using public service media is a powerful driver of how important people think they are. Independent public media are still often the first port of call for all age groups when looking for reliable news around stories such as the Ukraine conflict or COVID-19 but in almost all cases online reach is still much lower than that achieved through television and radio. In Germany and the UK, younger audiences are less likely than older ones to use public broadcasters and this is reflected in our scores around importance. In Germany, over-55s find news from public service media (ARD and ZDF) much more important than all other age groups. In the UK, this sense of importance is a bit more evenly spread across age groups.

PROPORTION THAT SAY PUBLIC SERVICE MEDIA ARE IMPORTANT – UK AND GERMANY



Q1_PSM_2023g_1/2. 'How important, or not, are publicly funded news services such as <brand> to you personally/to society? *Base: 18–24s/25–34s/35–44s/45–54s/55+ in UK = 198/251/327/334/997 and Germany = 184/305/301/375/847.*

We find similar gaps elsewhere, with a weaker sense of importance among those with lower levels of education, despite an explicit remit around providing for underserved audiences. Those who self-identify on the political right are also, in most cases, much less inclined to rate public media important compared with those on the left – making it easier for opponents to make the case that these organisations are part of a 'liberal elite'.

Further detailed analysis, where we also control for usage, suggests that education and political orientation remain significant predictors of people's perception of public service media news, but this is not the case with age. These findings suggest that lower perceived importance of public service media among younger people is related more to the fact that many younger people have grown up preferring digital and social media, and have little or no experience of using these services. This underlines how important it is for their long-term legitimacy that public service media find better ways to reach young people with relevant content and formats.

For further analysis see Section 2.4: The Importance of Public Service Media for Individuals and for Society

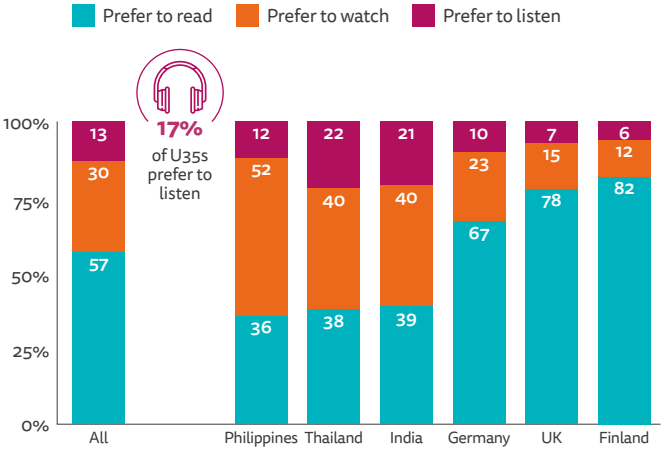
The growing importance of multimedia formats in online news

This year we asked respondents about their preferences for text, audio and video when consuming news online. On average, we find that the majority still prefer to read the news (57%), rather than watch (30%) or listen to it (13%), but younger people (under-35s) are more likely to listen (17%) than older groups. In the past, young and old have told us that they find reading the quickest and easiest way to access information, but the opportunity to multitask by listening to news seems to be particularly appealing to those brought up with smartphones and headphones.

Behind the averages we find significant and surprising country differences. In markets with a strong reading tradition, such as Finland and the United Kingdom, around eight in ten still prefer to read online news, but in India and Thailand, around four in ten (40%) say they prefer to watch news online, and in the Philippines that proportion is over half (52%). It is worth bearing in mind that less representative samples in these countries may be a factor in these differences.

In many Asian countries, populations tend to be younger, mobile data tend to be relatively cheap, and video news is widely available via platforms such as YouTube and TikTok. In Thailand, for example, greater opportunities for freedom of expression online have led to the creation of a spate of independent TV-style online shows that are widely consumed on mobile phones.

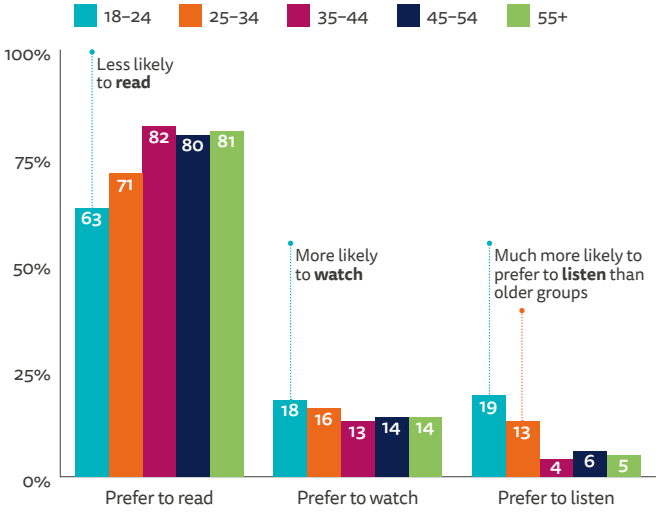
PROPORTION THAT SAY THEY PREFER TO CONSUME NEWS ONLINE IN EACH WAY – SELECTED COUNTRIES



OPTQ11D_2020. In thinking about your online habits around news and current affairs, which of the following statements applies best to you? Please select one. *Base: Total sample in each country ≈ 2000. Note: Don't know responses excluded.*

But even in countries with strong reading preferences, we find different patterns with younger generations. In the UK, a majority of 18–24s still prefer text, but they are much less likely to want to read online news compared with older groups, and have a stronger preference to watch as well as listen, suggesting future online news habits may look very different in the next decade.

PROPORTION THAT SAY THEY PREFER TO CONSUME NEWS IN EACH WAY (BY AGE) – UK

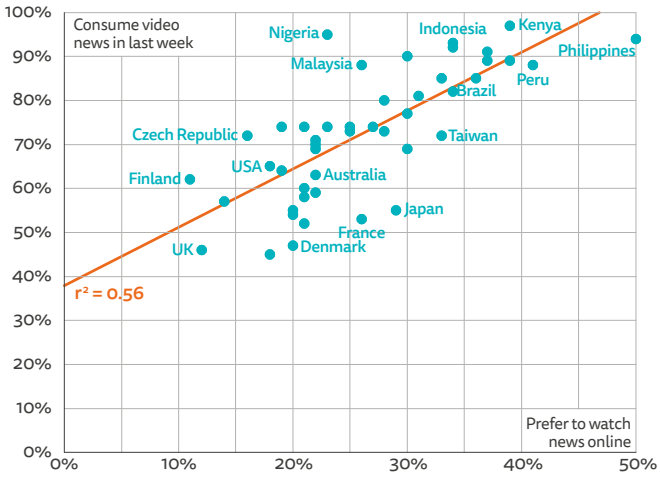


OPTQ11D_2020. In thinking about your online habits around news and current affairs, which of the following statements applies best to you? Please select one. *Base: 18–24s = 198, 25–34s = 251, 35–44s = 327, 45–54s = 334, 55+ = 997. Note: Don't know responses excluded.*

Video consumption has been growing across markets

Overall, we find that weekly consumption maps strongly onto these underlying preferences. In Kenya (97%), the Philippines (94%), and Thailand (91%), for example, respondents are twice as likely to consume news video weekly as those in the UK (46%) or Germany (45%).

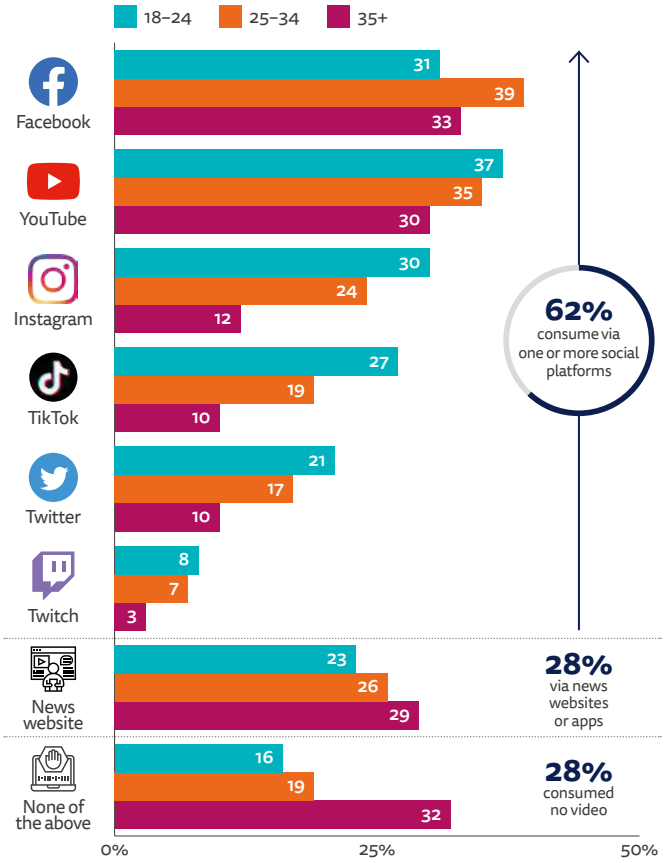
CORRELATION BETWEEN WATCHING ONLINE NEWS VIDEO AND PREFERENCE FOR WATCHING NEWS ONLINE – ALL MARKETS



Q11_VIDEO_2018a. Thinking about when you used online news-related video (a short clip, a live stream, or a full episode) over the last week, which of the following did you do? **OPTQ11D.** In thinking about your online habits around news and current affairs, which of the following statements applies best to you? *Base: Total sample in each market ≈ 2000.*

Across all markets, almost two-thirds (62%) consumed video via social media in the previous week and just 28% when browsing a news website or app. Facebook and YouTube remain the biggest outlets for online video, but with under-35s TikTok is now not far behind (see chart overleaf).

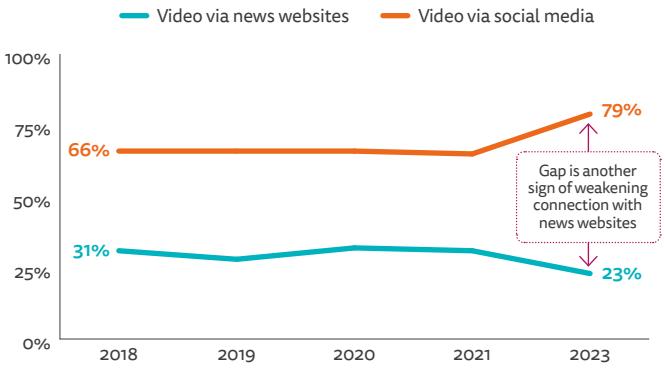
PROPORTION THAT WATCHED ONLINE NEWS VIDEO ON EACH IN THE LAST WEEK – ALL MARKETS



Q11_VIDEO_2018a. Thinking about when you used online news-related video (a short clip, a live stream, or a full episode) over the last week, which of the following did you do? Please select all that apply. *Base: 18–24s = 11,192, 25–34s = 16,918, 35+ = 65,785.*

Younger groups consume disproportionately more news video via social networks, but are less likely to access video via news websites or apps. The next chart illustrates how 18–24s have leaned into social media consumption in the last few years, a period that has coincided with the rise of short TikTok videos, Instagram Reels, and YouTube Shorts.

PROPORTION OF 18–24S THAT WATCHED ONLINE NEWS VIDEO VIA SOCIAL/NEWS WEBSITES IN THE LAST WEEK (2018–2023) – ALL MARKETS

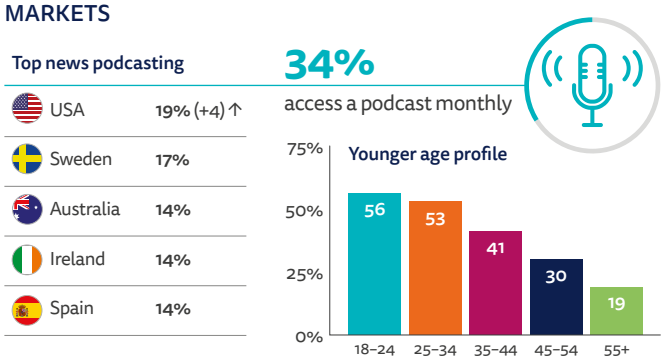


Q11_VIDEO_2018a. Thinking about when you used online news-related video (a short clip, a live stream, or a full episode) over the last week, which of the following did you do? Please select all that apply. *Base: 18–24s in each market-year ≈ 200. Note: Question not asked in 2022. TikTok and Twitch response options added in 2023.*

Podcast reach remains stable with a loyal audience

Audio news consumption has been growing in recent years driven by changing underlying audience preferences, higher quality content, and better monetisation. Publishers have been investing in podcasts because they are relatively low cost, help build loyal relationships, and are good at attracting younger audiences. Public broadcasters and leading newspaper publishers such as the New York Times and Schibsted in the Nordic region have invested in original shows – as well as building their own platforms for distribution. Overall, our data show that around a third (34%) access a podcast monthly across a basket of 20 countries where the term podcast is well understood. Around a third of these (12%) access a news podcast regularly, with the strongest growth in the United States and Australia. Just under a third (29%) say they have spent more time listening to podcasts this year, with 19% saying they have listened less.

PROFILE OF PODCAST LISTENERS – AVERAGE OF SELECTED MARKETS



Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Please select all that apply. *Base: Total sample = 40,902, 18-24/25-34/35-44/45-54/55+ = 3914/6449/6883/6845/16,811 in UK, Japan, Germany, France, Italy, Belgium, Netherlands, Finland, Austria, Denmark, Australia, Singapore, Argentina, Switzerland, Canada, USA, Spain, Norway, Sweden, Ireland.*

News makes up a relatively small proportion of podcasts in most markets, but plays a bigger role in the United States (19%). By contrast, only around 8% listen to news podcasts monthly in the UK. This year, we asked respondents in 12 countries to tell us *which* news podcasts they listened to, using an open survey field, and this has enabled us to build a good picture of the different types as well as their relative popularity.

In the United States, we find the *New York Times* explanatory podcast The Daily to be the most widely listened-to show, and the format has been widely copied around the world. The Danish equivalent, Genstart, was mentioned by 24% of news podcast listeners there, with public broadcaster DR accounting for over half of all named podcasts – and it is a similar story in Norway. In other countries, however, there are no clear winners, with a large number of podcasts each attracting a relatively small audience.

Extended talk formats such as The Joe Rogan Experience, which is exclusive to Spotify, are also popular with news podcast users across the world, even though shows can last up to several hours. In the UK, the BBC's Newscast faces stiff competition from Global Radio's The News Agents and political talk show The Rest Is Politics. The production of podcasts is also becoming more complex, we find, with many shows now filmed to enable wider distribution via video platforms such as YouTube, as well as more impactful promotion via social media.

For further analysis see Section 2.5: News Podcasts: Who is Listening, and What Formats are Working?

CONCLUSIONS

While some individual news brands have been very successful at building online reach or even convincing people to subscribe, this year's data show how fragile these advances are in the face of economic and political uncertainty, fragmenting audiences, and a new wave of platform disruption. Even as a few winners are doing well in a challenging environment, many publishers are struggling to convince people that their news is worth paying attention to, let alone paying for.

In the short term, growth is severely challenged by the combined impact of rising costs and falling revenues, as well as increasingly unpredictable traffic from legacy social networks like Facebook and Twitter. In the longer term, our data suggest that significant shifts in audience behaviour, driven by younger demographics, are likely to kick in, including a preference for more accessible, informal, and entertaining news formats, often delivered by influencers rather than journalists, and consumed *within* platforms like YouTube, Instagram, and TikTok. Visual and audio formats won't replace text online, but they are set to become a more important part of the mix over the next decade. But across formats, we still see the convenience and aggregating power of platforms trumping direct access, even if some smaller countries with strong publishers and high levels of trust have been able to buck these trends.

With an abundance of channels and options now available to consumers, it's perhaps not surprising that we find that news consumers are increasingly overwhelmed and confused, with many turning away temporarily or permanently. Selective news avoidance and news fatigue has been exacerbated by the tough times that we are living through. The 'public connection' between journalism and much of the audience continues to fray.

In this context is clear than most consumers are looking not for *more* news, but news that feels *more relevant*, and helps them *make sense* of the complex issues facing us all. New technological disruption from Artificial Intelligence (AI) is just around the corner, threatening to release a further wave of personalised, but potentially unreliable content.

Against this background, it will be more important than ever for journalism to stand out in terms of its accuracy, its utility, and its humanity. We can see from our data this year that audiences are ambivalent about algorithms but they are still not convinced that journalists and news organisations can do any better in curating or summarising the most important developments. The challenge ahead is, more than ever, about restoring relevance and trust through meeting the needs of specific audiences. Building relationships and communities won't be all about pushing people to websites and apps, even though that remains important for business models, but it will also mean reaching out through other platforms and channels with trusted information that provides real value to consumers – in return for attribution and hopefully financial return.

The war in Ukraine and the consequent economic shocks have encouraged publishers to further accelerate their transition to digital, embracing new business models, different types of storytelling, and new forms of distribution too. There will be many different paths but innovation, flexibility, and a relentless audience focus will be some of the key ingredients for success.

SECTION 2



SECTION 2

Further Analysis and International Comparison

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2.1 Attitudes to Algorithms and their Impact on News

Richard Fletcher

The vast majority of those aged under 35 now say that using social media, search engines, or news aggregators is their main way of getting news online. Even though the use of social media as a source of news has seen little growth in recent years, the centrality of social media, search engines, news aggregators, and other platforms that use algorithms to select news continues to grow as direct access to news websites and apps increasingly becomes confined to older and more interested consumers.

The rapid growth of these 'distributed' platforms in the first part of the twenty-first century was initially accompanied by excitement and enthusiasm, but over time this transformed into concerns about possible negative effects – first expressed in the speculative notion of 'echo chambers', some years later, 'filter bubbles', and more recently, the spread of misinformation. There has been extensive research into whether algorithmically driven platforms really do overexpose people to like-minded views, while filtering out information they are likely to disagree with, creating feedback loops that ultimately reshape their worldview. At least when it comes to news exposure in recent years, this does not appear to be happening (Ross Arguedas et al. 2022). For now, platform use appears to increase the diversity of people's news repertoires – but platforms change, the debate continues, and the overall effect on people's attitudes and beliefs is less well understood.

We also know little about people's attitudes and beliefs about algorithmic news selection itself. But these matter because many of the worst fears about echo chambers and filter bubbles are predicated on a view of audiences as passive, credulous, and unreflective recipients of information.

Surveys can help us see whether these assumptions are correct. In this chapter we use data from the *Digital News Report* to explore how people feel about news selected by algorithms, while comparing it with selection by editors and journalists. We also look at what drives people's views on news selection, how it varies by country, and how it has changed over time.

PEOPLE ARE SCEPTICAL ABOUT ALGORITHMIC NEWS SELECTION

To measure people's attitudes towards algorithmic news selection we asked respondents whether they agree that 'having stories automatically selected for me on the basis of "what I have consumed in the past" or "what my friends have consumed" is a good way to get news?'. To help interpret the results, we also asked respondents a similarly worded question about news selected by 'editors and journalists'.[12]

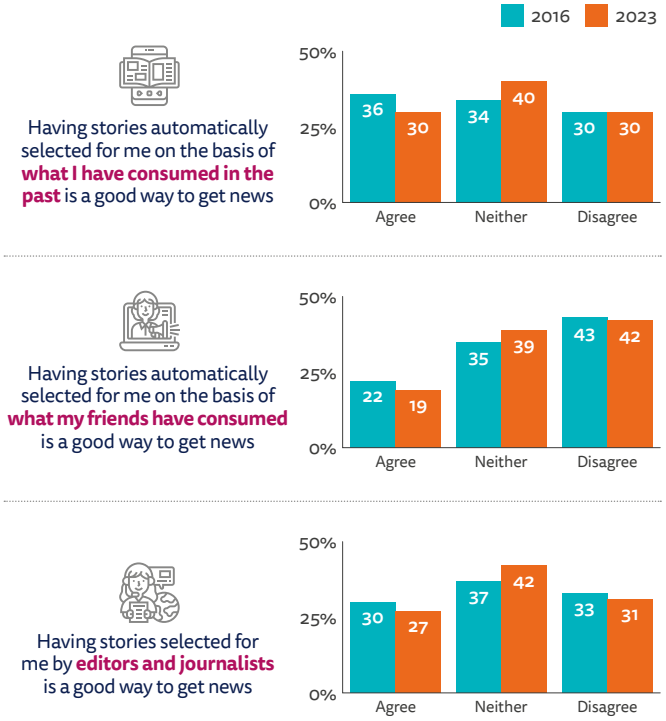
The headline results reveal that audiences are quite sceptical about all these ways of selecting news. Just 19% across all countries where we asked these questions[13] agree that having stories automatically selected for them on the basis of what their friends have consumed is a good way to get news, with 42% disagreeing. People have a more positive view of automatic selection based on past consumption, but just three in ten (30%) agree it's a good way to get news – with equal numbers disagreeing.

Perhaps surprisingly, this is slightly more positive than people's views of news selection by editors and journalists (27%). People are clearly quite sceptical of *all* forms of news selection, whether done by humans or by algorithms – something we have referred to in the past as 'generalised scepticism' (Fletcher and Nielsen 2018). Part of the reason we refer to this scepticism as 'generalised' is because people's views on all these methods of news selection are fairly strongly correlated ($r \approx 0.5$ for each comparison), meaning that people tend to have a similar view on all three. If someone thinks that editorial selection is a good way to get news, they usually think the same about algorithmic selection – and vice versa. Journalists, academics, and industry observers, often with good reason, tend to see these selection methods as being antithetical to one another – but it is important to recognise that audiences do not think about the issue in this way.

[12] To help respondents understand the question, we included a preamble which read: 'Every news website, mobile app or social network makes decisions about what content to show to you. These decisions can be made by editors and journalists or by computer algorithms analysing information about what other content you have used, or on the basis of what you and your friends share and interact with on social media.'

[13] So that we could compare over time, we asked the questions on algorithmic selection in all countries included in the 2016 *Digital News Report* (when we first fielded this battery of questions). The countries are listed in the second figure in this chapter.

PROPORTION THAT AGREE THAT EACH IS A GOOD WAY TO GET NEWS – AVERAGE OF SELECTED COUNTRIES



Q10D_2016a_1/2/3. Please indicate your level of agreement with the following statements. Having stories selected for me by editors and journalists/automatically selected for me on the basis of what I have consumed in the past/automatically selected for me on the basis of what my friends have consumed is a good way to get news. *Base: Total samples in 2016 = 53,330, 2023 = 53,039. Note: Questions asked in USA, UK, Germany, France, Italy, Spain, Portugal, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Hungary, Czech Republic, Poland, Greece, Turkey, Japan, South Korea, Australia, Canada, Brazil.*

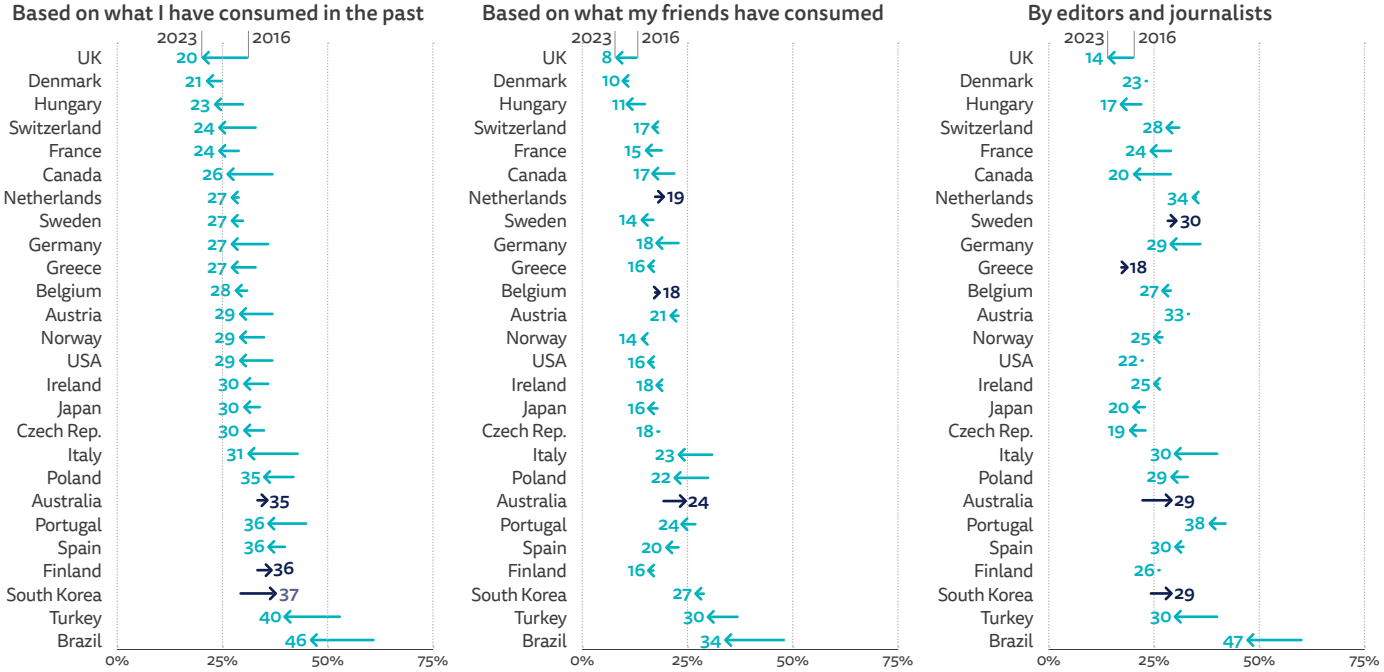
PEOPLE'S SCEPTICISM HAS CHANGED LITTLE OVER TIME

If we compare these results with those from the same questions in 2016, we can see that people's views on the issue have not changed very much in the last seven years – at least at the headline level. Averaging the data across the same set of countries, we see there has been a 6 percentage point fall in the proportion that think their past consumption is a good basis for automated news selection, and a smaller 3pp fall in approval of editorial selection and social recommendations. It is important to note that the proportion who do not think these are good ways to get news has remained stable, with 4–6pp increases in the middle 'neither agree nor disagree' category. This suggests that approval has morphed into ambivalence – but ultimately these are small changes, especially considering the seven-year gap and everything that has happened in between.

As ever these averages mask variation at the country level. The chart below shows that the UK, Denmark, and Hungary have the lowest levels of approval for both types of algorithmic news selection, whereas in Spain, South Korea, and Brazil approval is almost twice as high. Although it's not immediately clear from the chart below, there are a small number of high-trust, newspaper-centric countries in Northern and Western Europe – such as Austria (33%), Sweden (30%), and the Netherlands (34%) – where the figures for editorial selection, though still low, are slightly higher than those for both types of algorithmic selection.

The chart also shows how, in most countries, approval for all three modes of selection has fallen since 2016. Australia is something of an outlier as the only country where approval has risen across the board. In some countries, such as Canada, Brazil, and the UK, the changes from 2016 are relatively large – especially for news selected by algorithms on the basis of past consumption. However, although the downward trends are fairly consistent, in many cases the falls are of 3pp or less, and not statistically significant. And we should remember again that in most cases approval has been replaced with ambivalence.

PROPORTION THAT AGREE THAT EACH IS A GOOD WAY TO GET NEWS (2016–2023) – SELECTED COUNTRIES



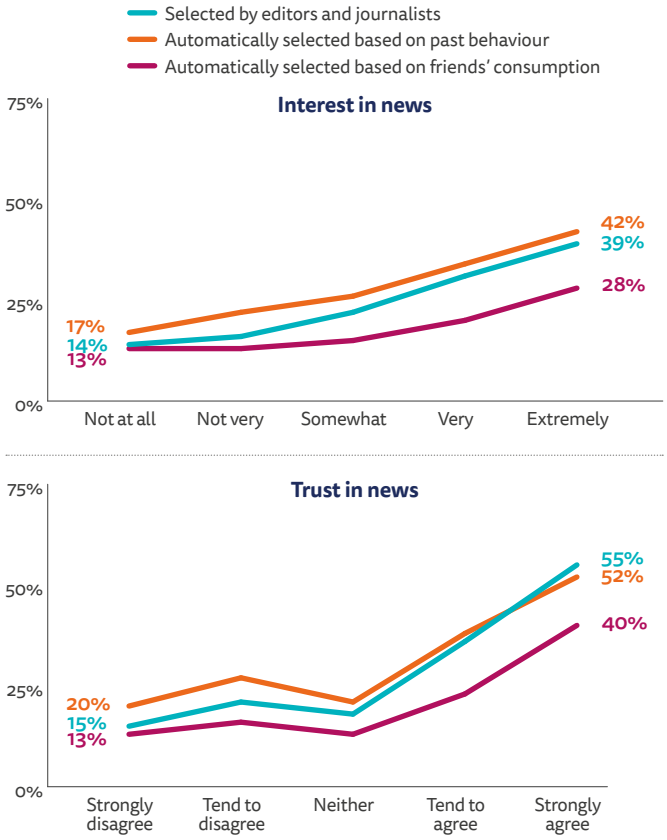
Q10D_2016a_1/2/3. Please indicate your level of agreement with the following statements. Having stories selected for me by editors and journalists/automatically selected for me on the basis of what I have consumed in the past/automatically selected for me on the basis of what my friends have consumed is a good way to get news. *Base: Total sample in each country-year ≈ 2000.*

INTEREST AND TRUST IN NEWS INCREASES APPROVAL OF NEWS SELECTION METHODS

Returning to the data from 2023, we see that approval for each method of news selection varies by interest in news. Those that say they are 'very' or 'extremely' interested in news are considerably more likely to agree that each is a good way of getting the news – not just when it comes to editorial selection, but also for both methods of algorithmic news selection. Approval for automatic selection based on past behaviour and selection by editors and journalists increases more with interest than automatic selection based on friends' consumption – but the increase is still clear.

Similarly, when we look at the results by different levels of trust in news, we see that approval for both algorithmic news selection and editorial news selection is significantly higher for those with higher levels of trust – with around half of those who 'strongly agree' that they can trust most news most of the time agreeing that automatic selection based on past behaviour (52%) and selection by editors and journalists (55%) are good ways to get the news.[14] Again, the parallel increases in approval for all three methods of news selection suggest that people do not have diverging views on algorithmic news selection versus editorial news selection.

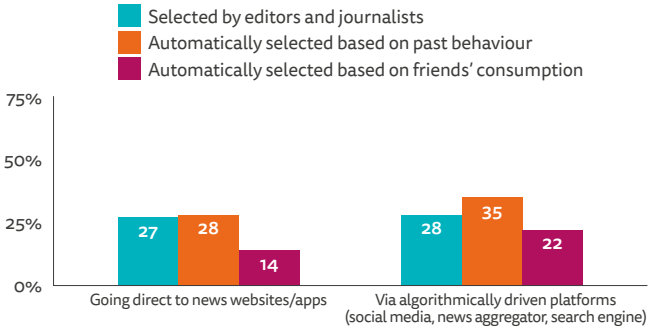
PROPORTION THAT AGREE THAT EACH IS A GOOD WAY TO GET NEWS (BY INTEREST AND TRUST IN NEWS) – AVERAGE OF SELECTED COUNTRIES



Q10D_2016a_1/2/3. Please indicate your level of agreement with the following statements. Having stories selected for me by editors and journalists/automatically selected for me on the basis of what I have consumed in the past/automatically selected for me on the basis of what my friends have consumed is a good way to get news. **Q1c.** How interested, if at all, would you say you are in news? **Q6_2016_1.** Please indicate your level of agreement with the following statements. I think you can trust most news most of the time. *Base: Not at all/Not very/Somewhat/Very/Extremely interested = 1,767/4,875/19,602/17,966/8,053, Strongly disagree/Tend to disagree/Neither/Tend to agree/Strongly agree they trust most news most of the time = 4,724/10,364/16,047/18,932/2,972. Note: Questions asked in USA, UK, Germany, France, Italy, Spain, Portugal, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Hungary, Czech Republic, Poland, Greece, Turkey, Japan, South Korea, Australia, Canada, Brazil.*

We can also explore the link between different types of news selection and what people say is their main way of getting news online. Although we might expect large differences between those who say their main way of getting news online is by going direct to news websites and apps and those who say their main way is to use a platform that relies on algorithmic selection (via social media, a news aggregator, or using a search engine to search for a news topic), in fact, the numbers and patterns stay broadly the same. It is true that people who say their main way of getting news online is via algorithmically driven platforms are a little more likely to approve of news automatically selected based on past behaviour (+7pp) and based on friends' consumption (+8pp) – but it is not the case that people with a preference for direct access and people with a preference for platform access have contrasting views on editorial and algorithmic news selection.

PROPORTION THAT AGREE THAT EACH IS A GOOD WAY TO GET NEWS (BY MAIN WAY OF GETTING NEWS ONLINE) – AVERAGE OF SELECTED COUNTRIES



Q10D_2016a_1/2/3. Please indicate your level of agreement with the following statements. Having stories selected for me by editors and journalists/automatically selected for me on the basis of what I have consumed in the past/automatically selected for me on the basis of what my friends have consumed is a good way to get news. **Q10a_new2017_rc.** Which of these was the main way in which you came across news in the last week? *Base: Those that say their main way of getting news online was via algorithmically driven platform = 18,806, going direct to news websites/apps = 13,251. Note: Questions asked in USA, UK, Germany, France, Italy, Spain, Portugal, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Hungary, Czech Republic, Poland, Greece, Turkey, Japan, South Korea, Australia, Canada, Brazil.*

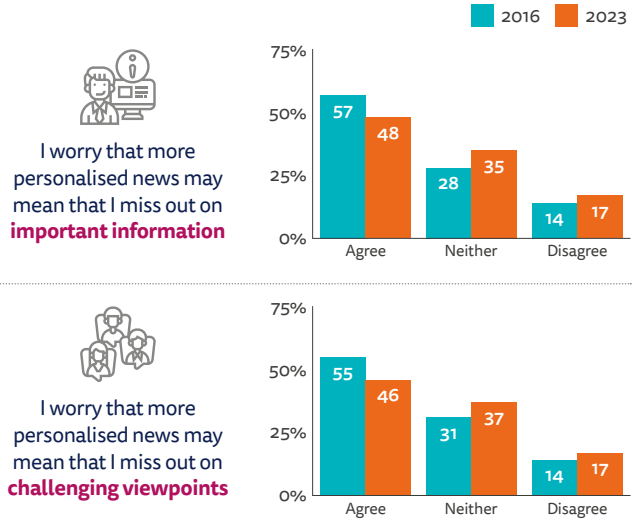
PEOPLE WORRY ABOUT OVER-PERSONALISATION

We also used the survey to ask people how they feel about some of the risks commonly associated with algorithmically selected news – more specifically, the risk that more personalisation might mean they are not shown certain types of information. Across all countries where we asked these questions, nearly half agree that they 'worry that more personalised news may mean that I miss out on important information' (48%) and 'challenging viewpoints' (46%). Figures for both are higher among those with higher levels of interest and trust in the news, and at the country level, concern about both is highest in the UK, USA, Australia, and Norway.

The average figures are slightly down from 2016, where just over half (57% and 55% respectively) say they 'tend to agree' or 'strongly agree' with these statements. Although there was a slight increase in the proportion that disagree (+3pp), the numbers for 'neither agree nor disagree' increased by 6–7pp – again highlighting an increase in ambivalence. Nonetheless, there is still considerable public concern about the potential effects of over-personalisation, even as algorithmically driven news access via search, social, and aggregators becomes more important in many parts of the world.

[14] Other research, based on independent analysis of the 2016 data, found similar associations between interest and trust in news and each selection method, as well as negative associations for education and age. Although the direction of the association did not vary by selection method, the strength of the association did vary for some variables (Thurman et al. 2019).

PROPORTION THAT AGREE THEY ARE WORRIED ABOUT EACH (2016–2023) – AVERAGE OF SELECTED COUNTRIES



Q10D_2016b_1/2. Please indicate your level of agreement with the following statements. I worry that more personalised news may mean that I miss out on important information/ challenging viewpoints. *Base: Total samples in 2016 = 53,330, 2023 = 53,039. Note: Questions asked in USA, UK, Germany, France, Italy, Spain, Portugal, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Hungary, Czech Republic, Poland, Greece, Turkey, Japan, South Korea, Australia, Canada, Brazil.*

GENERALISED SCEPTICISM

People's attitudes towards news selection – whether it's done by algorithms or by editors and journalists – can be characterised by 'generalised scepticism'. People are clearly sceptical about whether automatic news selection based on past behaviour or friends' consumption is a good way to get news, and they worry about missing out due to overpersonalisation – but they are equally wary of how editors and journalists select news. Furthermore, people's views on algorithmic and editorial selection are often closely aligned. If they are sceptical of one (and they often are), they are likely to be sceptical of the other, too. Few people, for example, have a positive view of editorial selection while holding a negative view of algorithmic selection based on past behaviour.

These views have changed little since 2016 – though there's some evidence that people have become a little more ambivalent over time. This may be because we are past the peak of concerns about echo chambers and filter bubbles (even as concern over misinformation is as high as ever), or it could be because most people are now using more social networks – each using algorithmic news selection in different ways – making it harder for people to have a consistent positive or negative view.

We might take some comfort from the apparent scepticism surrounding algorithmic selection, as it suggests that people interpret what they see on platforms quite cautiously. Despite becoming increasingly important for how people get news, most people are far from enthusiastic about how platforms select news for them. Platforms, then, rather than seeing their increased importance as a ringing endorsement of users' news experience, should perhaps remember that this is partly due to declining levels of interest in news, and associated falls in direct access to news websites and apps, which have made platforms relatively more important. Most people do not come to platforms for news specifically but come across it when they are there for other reasons.

Publishers should perhaps keep in mind that most people do not see their selection processes as markedly different from those employed by platforms. In most countries people think that the automatic assessment of their past behaviour will deliver better results for them than the considered judgement of editors and journalists. This suggests that publishers have some work to do to convince audiences of the value they add as experts in news selection, while also pointing to the limits of simply asserting the value of that expertise when trying to win back trust. Algorithmic news selection is far from perfect, but editorial selection isn't perfect either – and people seem to know it.

2.2 Unpacking News Participation and Online Engagement over Time

Kirsten Eddy

The digital age, and particularly the rise of social media, was initially associated with a utopian vision of global media access and participation. While internet users *do* have more means of digital participation than ever before, it has been less clear whether people in practice use it to actively participate in their news environments.

Now, as publishers and journalists increasingly worry about news avoidance and disengagement, they are also grappling with a 'new normal' of more online but often less openly participatory news users. Smaller proportions of the public are participating with news actively (22% via posting and commenting), while growing numbers either participate reactively (31% via reading, liking, or sharing) or simply do not participate with news at all (47%). Online and offline participation is not an either/or proposition, as talking face to face about news (while also falling over time) even in an increasingly digital media environment remains, on average, the most widely reported form of news participation, at 32%.

Participation in public life and debate is often considered a central element of civic engagement in democratic societies. It matters, then, both how (and how much) people are participating in these debates as well as who is shaping them. In this chapter, we offer a deeper dive into news participation and online engagement. How do people participate with news, and how have these trends changed over time? And in what public discourse often depicts as a toxic or divisive digital environment, and where a significant number of users face very serious harassment, hate speech, and worse, how does the general public actually feel about engaging with news or talking about politics?

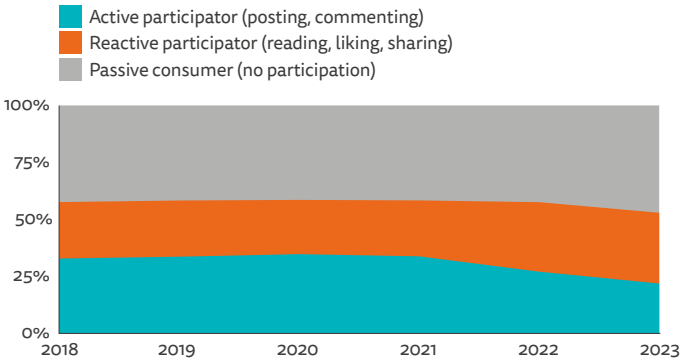
While negative online news experiences – and the very real, and often unequal, problems they are a result of – are important, we find they are not *most* respondents' experience. Yet many nonetheless feel they must be wary of what they say as online and offline discourse become increasingly constrained.

CHANGING NEWS PARTICIPATION AND THE RISE OF THE PASSIVE CONSUMER

For many years, we have tracked how people share or participate in news coverage during an average week. Looking at segmentations of those who engage with online news actively (by posting or commenting), reactively (by reading, liking, or sharing), and passively (by consuming news but not participating at all), in recent years we can see the rise of the passive news consumer (up 5 percentage points, on average, from 42% in 2018 to 47% in 2023) and reactive participator (up 6pp, from 25% to 31%) alongside a substantial fall in active participation (down 11pp, from 33% to 22%).

As we describe in the Executive Summary, *active participators* are now more likely to be men, higher educated, more politically partisan, and more interested in news – so while this group has declined to less than a quarter of news users, it increasingly looks like the (unrepresentative) traditional news audience.

PROPORTION IN EACH NEWS PARTICIPATION SEGMENT (2018–2023) – ALL MARKETS



Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. *Base: Total sample in each market-year ≈ 2000. Note: Number of markets grew from 36 in 2018 to 46 from 2021 onwards. Markets listed in online methodology.*

Why do we see falls in open and active sharing alongside rises in passive consumption? There are a number of possible reasons. In part, it may be due to broader changes in *which* social networks people around the world are using for news – for example, falling Facebook use in general and particularly among younger audiences alongside Meta's shift in focus away from news, and the increasing popularity of private messaging apps especially in Latin American, Asia-Pacific, and Eastern European markets. Other factors, including less optimism about or novelty surrounding the participatory opportunities of social media, may also be at play.

Of course, news participation varies considerably across countries and regions. For instance, we find higher overall trends of participation in African, South East Asian, and Latin American markets, and much lower participatory trends in markets in Central and Northern Europe, North America, and East Asia. It is important to note here that data from India and African markets are representative of younger, more educated English speakers – and thus, participation may be higher among these groups than the national population. However, it is likely that these trends reflect both sample differences as well as media environments with high reliance on and adoption of social networks. For instance, a third of people are active participators in Thailand (36%), where social media is by far the most important gateway to news, versus one in ten in Denmark (10%), where direct brand connections remain much stronger.

When we focus on individual forms of news participation, we find steady decreases over time for most forms of public participation with news, both online (e.g. liking, sharing, and commenting on news on social media) as well as offline (e.g. talking about the news with friends and colleagues). In the social media age, 'shareability' has become central to how digital news is produced, consumed, and (re)distributed. However, it is often unclear to what extent online news users actually embrace these forms of participation.

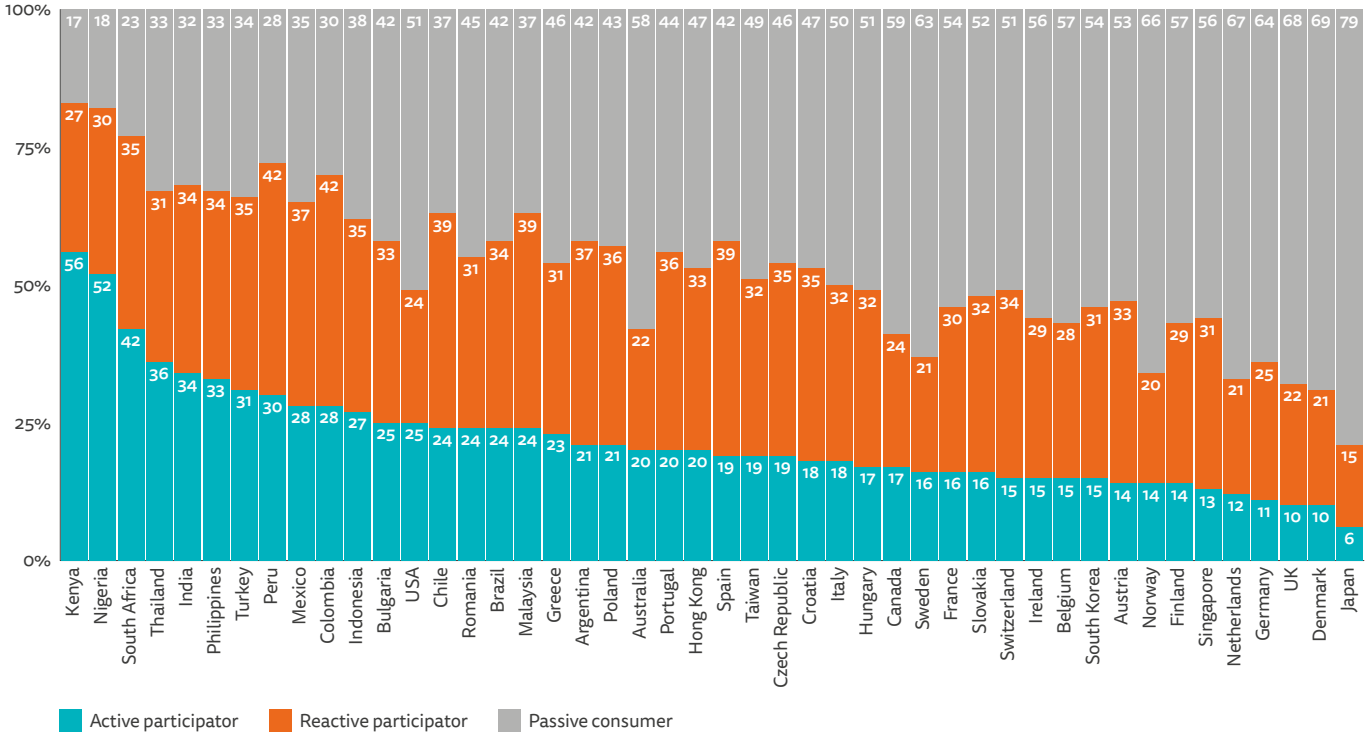
Our data on news sharing over time also show one closed form of sharing – via private messaging apps – growing, even amid steady declines in open forms of sharing and commenting as well as other closed forms of sharing. Across all markets since 2018, sharing news stories via social networks has steadily decreased, on average, from 26% to 19%, and sharing via email is down from 12% to 7%. Meanwhile, sharing news stories via messaging apps has increased, on average, from 17% to 22%. This is particularly pronounced in markets in Latin America, South East Asia, and Southern Europe with higher overall use of private messaging apps – such as Colombia (35%), Malaysia (33%), and Spain (30%), where nearly a third of people regularly share stories via instant messengers. It also maps onto broader rises across all markets in people's overall use of messaging apps such as WhatsApp (+9pp) or Telegram (+12pp) during the same time frame.

PROPORTION THAT SHARE OR COMMENT ON NEWS IN AN AVERAGE WEEK (2018–2023) – ALL MARKETS

Type of news participation	2018–2023	pp change
Share via social network	26% → 19%	↓ -7
Share via email	12% → 7%	↓ -5
Comment in a social network	20% → 18%	-2
Comment on a news website	10% → 9%	-1
Share via instant messenger	17% → 22%	↑ +5

Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. *Base: Total sample in each market-year ≈ 2000. Note: Number of markets grew from 36 in 2018 to 46 from 2021 onwards. Markets listed in online methodology.*

PROPORTION IN EACH NEWS PARTICIPATION SEGMENT – ALL MARKETS



Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. *Base: Total sample in each market ≈ 2000.*

But are those who share news privately distinct from those who share publicly? Four in ten (41%) of those who say they share publicly on social media *also* say they share privately on messaging apps – so while there is substantial overlap, a majority of those sharing via messaging apps are drawn specifically to this form of private sharing, or perhaps drawn away from public sharing.

It is difficult to fully explain these trends, but research suggests segments of the public may now avoid publicly sharing or participating in news because they perceive online debates as toxic (Mathews et al. 2022). This may be worsening as relatively smaller numbers of (often more male, more partisan, and more motivated) people take up most of the active news participation, and many in the middle appear to be increasingly wary of publicly engaging with news and politics online. While offline participation is not immune to over-time declines, it is telling that talking offline with friends and colleagues about news remains the most popular form of news participation among, on average, a third of news users (32%, down 7pp from 2018).

'DON'T READ THE COMMENTS': HOW PEOPLE FEEL ABOUT ENGAGING WITH NEWS ONLINE

Whether fairly or not, the comments sections of media sites and social platforms are largely portrayed in public discourse to be a hellscape of toxic, uncivil content and online trolls. In qualitative research we conducted this year, a 64-year-old woman in the UK expressed, 'I am shocked, however, by the vitriolic comments that were left on a recent article … I rarely identify with the commentators. They could of course be trolls.'

However, compared with other forms of news participation, *reading* comments online is among the most common activities the public does regularly. This year, we added two new types of news participation to our survey, asking respondents if they read the comments on social media posts as well as on news websites. On average across all markets, 31% of people say they read comments on social media news posts during an average week, and a quarter (25%) read comments on news websites. This compares to around one in five, on average, who share (19%) or comment on (18%) news stories in a social network, and one in ten who comment on a story on a news site (9%).

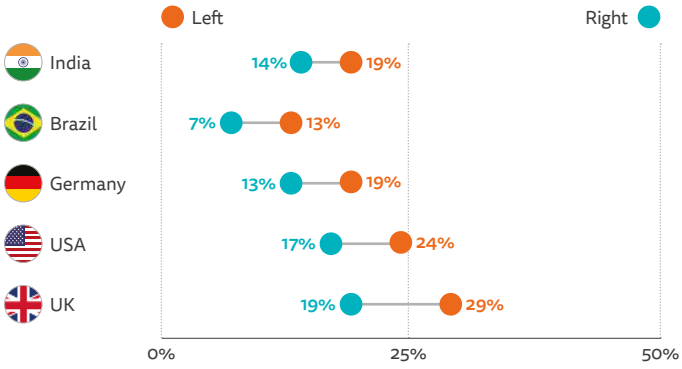
We also asked respondents how positive or negative their experience is engaging with news online or on social media, including reading or posting comments and talking to people about news. We find that while many have reason to be wary of online participation, across all markets, people are nearly three times more likely to say their experience engaging with news online is positive (33%) than negative (13%), with the largest swath of the public describing their experience as neither positive nor negative (40%).

Given the public discourse around online engagement, it may be surprising that a large majority of people do not feel negatively about these experiences – but this may be, in part, because many are simply not engaging with news much online. We see some evidence of this when we look specifically at passive consumers (those who aren't participating with news), who are far more likely to express ambivalence about engaging with online news (43%) than to say they feel positive (18%) or negative (15%).

It is clear that these perceptions have important ties to people's broader news participation. Across all markets, people are, on average, twice as likely to actively participate with news when their overall perception of engaging with news online is positive (36%) than negative (18%). Further, those with negative online experiences (21%) are nearly four times as likely as those with positive online experiences (6%) to not participate *at all* with news. At the same time, those with negative experiences are still just as likely to talk face to face with friends or colleagues about news (36%) as those with positive online news experiences (37%) – which illustrates that how people perceive their online news experiences clearly affects online news participation but may not curb how they interact with news *offline*. (Of course, the direction of this relationship could also be the other way around, with participation influencing people's online experiences.)

However, perceptions of online news experiences vary drastically among specific demographic groups, with important consequences for their participation with news. In some cases, the gender gap is very clear (7pp in the US), and in certain markets, politics plays a critical role in these perceptions as well. On average across all markets, people who are interested in politics are twice as likely to have positive online news experiences (48%) as those who are not interested (23%). While there is little difference between the left and right overall, in some countries – including the UK (10pp), US (7pp), Brazil (6pp), Germany (6pp), and India (5pp) – we find those on the political left are far more likely than those on the political right to say their online news experiences are negative.

PROPORTION THAT HAVE A NEGATIVE EXPERIENCE ENGAGING WITH NEWS ONLINE (BY POLITICAL LEANING) – SELECTED MARKETS



Q1_Participation_2023. How positive or negative is your experience of engagement with news online or on social media (e.g. reading or posting comments, talking to people about news, etc.)? **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/Right in India = 490/249, Brazil = 492/529, Germany = 237/127, US = 535/447, UK = 409/274.*

Further, in markets like Portugal, Germany, France, and Brazil, the youngest cohort of 18–24s are significantly more likely than any other age group to say they have negative online news experiences. It may be that younger audiences are more likely to be politically left-leaning, or that they see more discourse about the internet – and, specifically, about online comment sections – being negative environments. It could also be that these age groups are often more present online and participate more frequently on digital platforms that tend to be overwhelming, either in terms of toxicity or the expectations they set on users. However, these trends are less present in markets such as the US, the UK, and Spain.

People's perceptions of their online news experiences also play a role in how and why they take measures to change what they see on online platforms. On average across all markets, those with negative online experiences are slightly more likely than those with positive experiences to actively try to change their news feeds specifically to see less negative (28% vs. 24%, respectively) or toxic (33% vs. 29%, respectively) content.

PROPORTION WITH NEGATIVE ONLINE NEWS EXPERIENCES THAT ARE TRYING TO ACHIEVE EACH WHEN CHANGING WHAT THEY SEE ON ONLINE PLATFORMS – AVERAGE OF SELECTED MARKETS



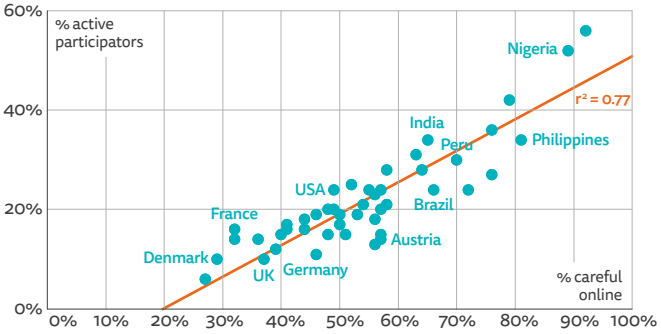
Q2_Algorithms_2023. You said that you try to change what news and information you see on online platforms. What are you trying to achieve? Please select all that apply. **Q1_Participation_2023.** How positive or negative is your experience of engagement with news online or on social media (e.g. reading or posting comments, talking to people about news, etc.)? *Base: Those with negative online news experiences who try to change what they see via their algorithm = 1994. Note: Question asked in USA, UK, Germany, Spain, Belgium, Netherlands, Turkey, Japan, South Korea, Hong Kong, and Brazil.*

PARTICIPATION IN POLITICAL CONVERSATIONS ONLINE AND OFFLINE

Broadly, there is some sense that public debate is becoming more constrained, particularly when it comes to online debates about news and politics. This year, we also asked about how careful people feel they must be about what they say when they talk about politics online (via social networks, messaging groups, etc.) or offline (face to face, on the phone, etc.). On average across 46 markets, majorities of people express being wary of what they say in political conversations both online (54%) and offline (52%).

Perceptions of not needing to be careful about what one says remain consistently low across markets when it comes to online political conversation. However, we find much more nuance when it comes to offline political conversation. For instance, in less politically contentious European markets such as Finland (52%), Denmark (49%), and Germany (44%), nearly half of people feel they do not need to be careful about what they say offline. On the other hand, in markets like the US (28%), Australia (25%), or Brazil (16%), where political debates are often more polarised, this is not the case – with around a quarter or less of respondents feeling comfortable expressing their political opinions offline.

CORRELATION BETWEEN PROPORTION WHO FEEL THEY MUST BE CAREFUL WHEN TALKING ABOUT POLITICS ONLINE AND PROPORTION OF ACTIVE PARTICIPATORS – ALL MARKETS



Q2_Participation_2023. When talking about politics with people online (e.g. via social networks or messaging groups), how careful do you feel you have to be with what you say? **Q13.** During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. *Base: Total sample in each market ≈ 2000.*

Overall, comparing responses within markets, people are generally just as likely to feel they must be careful about what they say online as they do offline. There are clearly chilling effects, but it is not always clear they are specific to digital media. In around half of all markets, majorities of respondents feel they must be careful about what they say when talking about politics online and offline. These concerns are more prominent among political partisans, the highly educated, and those who are more interested in politics, regardless of medium. Notably, in many cases, the markets where people are more concerned about discussing politics online are also often those with more active participators. (And some of them have mixed or low media freedom rankings, according to the Reporters Without Borders (RSF) World Press Freedom Index.) These perceptions are particularly high among respondents in countries such as the Philippines (81% online, 78% offline) and Peru (70% online, 67% offline), where citizens may feel the chilling effects of political unrest, online intimidation tactics, or other threats to free expression.

CONCLUSION

The changing patterns we reveal here for participation with news suggest, in many markets, less – and perhaps more constrained – public debate overall, despite the idealistic hopes with which we entered the digital age. The group of people who make up a large swathe of what the public sees as open participation with the news and information cycle continues to shrink. While people are still more likely to discuss news face to face than other forms of news participation and are more likely to feel positive or simply ambivalent about their experience engaging with news online, many still say they are wary of how they express themselves in both online and offline settings.

Why this is happening is less clear, but the changing nature of social platforms and the changing role of news within them, the dominance of an unrepresentative but vocal minority actively engaging online, and public discourse portraying the news as depressing, as well as the internet (and, specifically, comments sections on news sites and social media) as a uniquely toxic environment likely do not help.

These trends raise new questions surrounding what participation and engagement mean in an increasingly online but less openly participatory news environment. It may be less that participation has decreased than that the nature of participation is changing, as many publishers move away from open features of news participation like online comments sections and as social media platforms downrank or limit users' interactions with news.

It remains to be seen how publishers seeking to build, maintain, and connect with their audiences will try to adjust to this 'new normal' of online participation. However, our findings illustrate a critical link between how people perceive their experiences engaging with news online and their willingness to actively participate in it. For both publishers and platform companies focused on better audience experiences, this speaks to the clear importance of fostering healthy digital spaces – including through practices like content moderation – as one means of promoting online participation, particularly when it comes to the large segment of the public that is increasingly wary of engaging online.

2.3 Sources and Drivers of News Media Criticism

Craig T. Robertson

The news media, as an institution, are integral to much of politics and public life. With this role often comes public criticism. Journalists do not always get the story right and sometimes omit important voices and points of view. In such cases, criticism can be fair and help those interested in fixing mistakes and improving coverage. Given the influence that many news outlets have, criticism can also be about members of the public holding power to account. On the other hand, this criticism is sometimes unfair and hostile, and can veer into dangerous rhetoric aimed at undermining the free press. This hostile rhetoric often disproportionately affects women and journalists from minority and underprivileged backgrounds. That is especially worrying when cheered on by powerful politicians and driven by organised campaigns seeking to silence individual journalists or independent news media.

Such varied forms of criticism are an integral part of public life, and often especially visible on social media. In our survey, we asked how often people are exposed to criticism of the news media, and, in this chapter, we examine differences in who sees criticism, as well as differences across markets. We also look at the sources of criticism people say they are exposed to and on what platforms they come across it.

At the outset, it is also important to underline that our findings are based on survey data, which, while useful for the purposes we use them for here, (a) rely on respondents' own definitions of what constitutes criticism, (b) are not able to capture which specific media or journalists people have seen criticism of, (c) do not provide a basis for distinguishing between fair and unfair – or outright dangerous – criticism, and (d) do not tell us what effects exposure to criticism, fair or unfair, might have on people's views or attitudes.

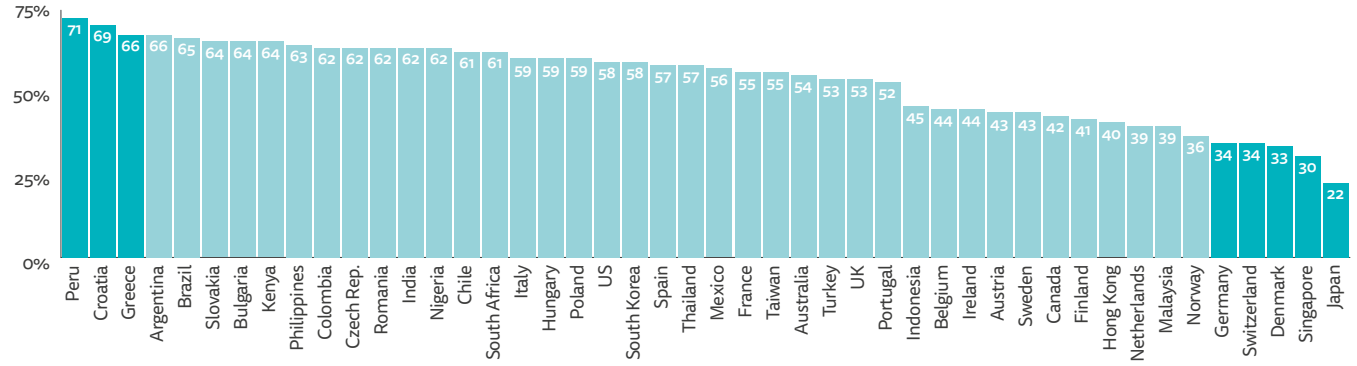
EXPOSURE TO NEWS MEDIA CRITICISM

We asked respondents in every market how often, if at all, they saw or heard people criticising journalists or the news media where they lived.[15] On average, across all markets, half of people (53%) say they are 'very' or 'quite often' exposed to news media criticism.

It is important to note at the outset, however, that there is a large amount of variation in reported exposure to news media criticism across markets. At the higher end of exposure are many Latin American and Southern/Eastern European countries, where as many as two-thirds of people say they very or quite often see news media criticism. Highest of all is Peru, at 71%. At the lower end are markets such as Singapore, Denmark, Germany, and Switzerland, where only one-third of people say they regularly see such criticism. Lowest of all is Japan, at just 22%. Across all markets, political partisans are more likely to report that they 'very often' see news media criticism.

[15] The question we asked was broad, intended to capture exposure to both legitimate and unfair forms of criticism, which can look similar depending on the perspective of the individual exposed.

PROPORTION THAT QUITE OFTEN OR VERY OFTEN HEAR PEOPLE CRITICISING JOURNALISTS OR THE NEWS MEDIA – ALL MARKETS



Q1_Criticism_2023. How often, if at all, do you see or hear people criticising journalists or the news media in <country>? *Base: Total sample in each market ≈ 2000.*

In the Executive Summary, we noted the link between higher levels of exposure to news media criticism and greater levels of media distrust. In Eastern European markets such as Bulgaria, Slovakia, and Hungary, this link is particularly strong. These countries have seen continued pressure and attacks on journalists from politicians (Slovakia), state capture of mainstream media and the vilifying of independent news outlets (Hungary), and ideological struggles between media outlets with different national visions (Bulgaria). But it's difficult to say in many cases which direction this trust–criticism relationship goes: it may be that more exposure to criticism influences people's views, leading them to trust the news media less. At the same time, those with low trust in news may notice or seek out more criticism, precisely because of their low trust.

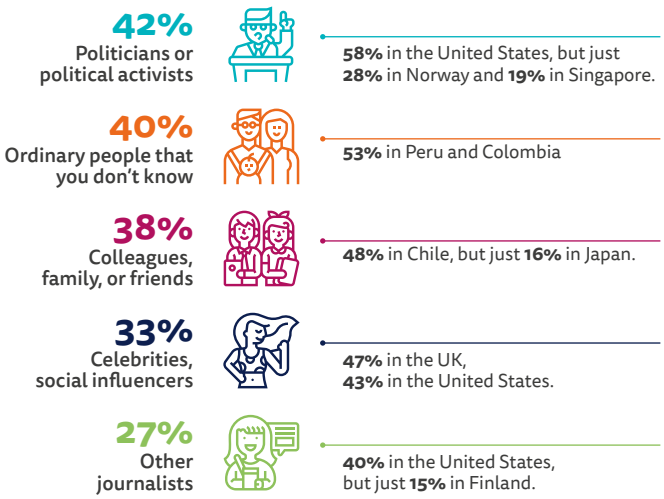
For further information on news media criticism, see relevant country pages (e.g. Hungary, Slovakia, and Bulgaria) in Section 3

SOURCES OF NEWS MEDIA CRITICISM: THE ROLE OF POLITICIANS AND OTHER PUBLIC FIGURES

In the aggregate, across all markets, politicians and political activists are the most frequently cited source of news media criticism among those reporting any level of exposure in general, with 42% saying this is who they have seen or heard criticism from in the last year. This is followed closely by exposure to criticism from 'ordinary people who you don't know' (40%) and friends/family (38%). Lowest among the sources of news media criticism that people report being exposed to is criticism from other media outlets (27%). Many partisan and alternative news outlets often criticise other media, but these brands tend to be used by smaller sections of the public.

There are, of course, big differences across markets. Countries such as the United States (58%), Turkey (53%), and Hungary (53%) rank among the highest in reported exposure to criticism from politicians or political activists. In the polarised US context, reported exposure to news media criticism from politicians among people on the left and the right is high (64% and 68%, respectively, of those reporting exposure to criticism, compared with 55% of centrists). Democratic politicians have been vocal in their criticisms of Fox News in recent times,[16] while members of the Republican Party have long decried the so-called 'liberal media'. Meanwhile, President Erdoğan in Turkey and Prime Minister Orbán in Hungary continue in their long campaigns against independent journalists. There is less reported exposure to criticism from politicians in markets like Norway (28%), the Netherlands (31%), and Denmark (35%).

PROPORTION OF THOSE THAT HAVE HEARD PEOPLE CRITICISING JOURNALISTS OR THE NEWS MEDIA THAT HAVE HEARD CRITICISM FROM EACH – ALL MARKETS



Q2_Criticism_2023. Which of the following, if any, have you seen or heard criticising journalists or the news media in your country in the last year? Please select all that apply. **Q1_Criticism_2023.** How often, if at all, do you see or hear people criticising journalists or the news media in <country>? *Base: Those who quite often or very often hear criticism of journalists or the news media = 77,363.*

Across markets, those reporting greater exposure to news media criticism from politicians are older (46% of those aged over 45, compared with 37% of those under 45) and more interested in politics (55% of those extremely/very interested in politics, compared with 29% of those not interested). They are also slightly more politically partisan (45% of those on the left and 48% on the right, compared with 43% of those in the centre).

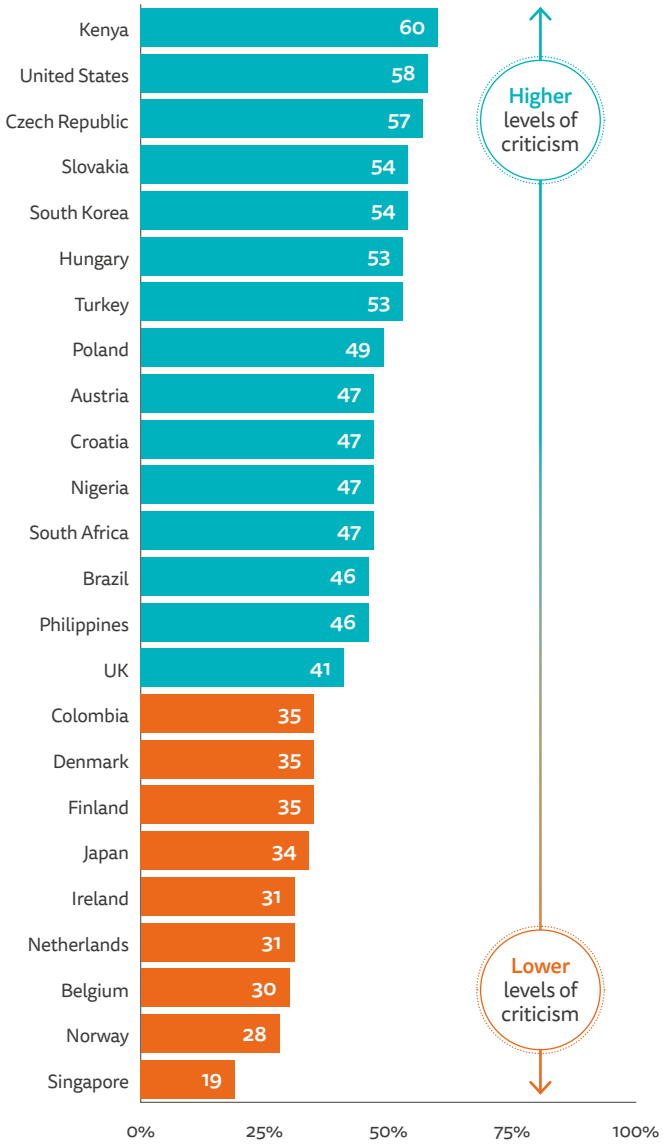


Prime Minister of Hungary, **Viktor Orbán** (left), and President of Turkey, **Recep Tayyip Erdoğan** (right).

[16] https://www.washingtonpost.com/opinions/2023/03/02/fox-news-texts-rupert-murdoch-democrats/

Politicians or political activists are the most frequently cited source of news media criticism in a third of all markets (16 out of 46), with reported exposure from politicians being considerably more prevalent in Eastern Europe and markets such as Kenya, Turkey, Hungary, and the United States. This is a reminder that some of the most prominent and consistent criticism of journalism tends to come from those in political power – at times from those with an axe to grind against the free press. This criticism can sometimes become vitriolic, stoking the ire of partisans who follow these political leaders. Given what we know from decades of research on the role of elite cues in how people form opinions (e.g. Fawzi 2019), it is also likely to be among the most consequential forms of criticism in terms of undermining trust in news or encouraging people to turn against the media.

PROPORTION OF THOSE THAT HAVE HEARD PEOPLE CRITICISING JOURNALISTS OR THE NEWS MEDIA THAT HAVE HEARD CRITICISM FROM POLITICIANS OR POLITICAL ACTIVISTS – SELECTED MARKETS



Q2_Criticism_2023. Which of the following, if any, have you seen or heard criticising journalists or the news media in your country in the last year? Please select all that apply. **Q1_Criticism_2023.** How often, if at all, do you see or hear people criticising journalists or the news media in <country>? *Base: Those who quite often or very often hear criticism of journalists or the news media ranging from Philippines = 2073 to Denmark = 1412.*

Meanwhile, in the UK, celebrities, comedians, and social media personalities rank as the primary source of exposure to news media criticism (with 47% of those exposed to media criticism in the UK reporting these as a source, followed by politicians at 41% and family/friends at 40%). The UK has the highest reported exposure to celebrities as a source of media criticism among the markets we survey, where figures like film star Hugh Grant, who has publicly fronted the Hacked Off campaign to draw attention to press accountability and the protection of people from harmful and unethical journalistic practices, and Prince Harry, who has highlighted the media's treatment of himself and Meghan Markle, feature as prominent critics of the press.



Hugh Grant (left) and **Prince Harry** (right) have been prominent critics of the UK news media.

The US also ranks high (4th) in reported exposure to criticism from celebrities, at 43%, and high (3rd) in reported exposure to media criticism from other media (at 40%), with the latter likely being driven by the increasingly antagonistic relationship between politically polarised news outlets.

Across markets, reported exposure to news media criticism from celebrities is slightly higher among younger people (36% of those aged under 45, compared with 31% of those over 45), likely because of their more frequent use of social media and the higher attention they pay in general to these individuals for news and information.

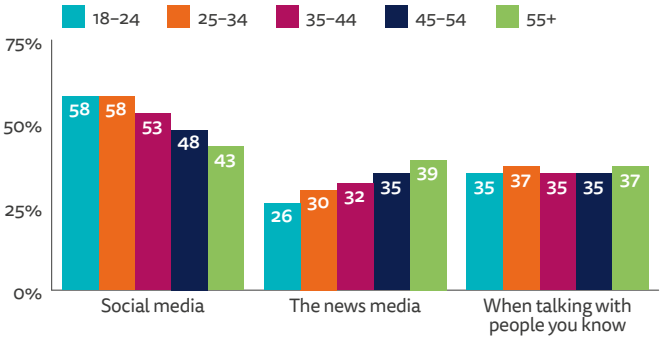
THE ROLES OF SOCIAL MEDIA AND THE PUBLIC IN DISSEMINATING NEWS MEDIA CRITICISM

Turning from *sources* of criticism to *platforms* for criticism, we also asked people in 12 markets[17] where they mainly saw or heard criticism of journalists or the news media. Social media is by far the most common way people say they are exposed to criticism, with 49% of those reporting exposure to criticism across markets saying this is where they see or hear it, followed by discussions with people they know (36%) and the news media themselves (35%). Most of those who see criticism have seen it on two or more platforms (including offline) but, across the markets surveyed, a quarter of people (25%) say they have *only* seen it via social media.

These numbers are perhaps not surprising since, on social media, there is much more opportunity to see news media criticism from all types of sources, whether they are politicians, celebrities, or everyday people. Younger people are more likely to report seeing news media criticism on social media, while a higher proportion of those in older age groups report seeing criticism via the news media.

[17] These 12 markets were: US, UK, Germany, Belgium, Netherlands, Slovakia, Croatia, Japan, South Korea, Taiwan, Hong Kong, and Singapore.

PROPORTION OF THOSE THAT HAVE HEARD PEOPLE CRITICISING JOURNALISTS OR THE NEWS MEDIA THAT HAVE HEARD CRITICISM FROM EACH – AVERAGE OF SELECTED MARKETS



Q3_Criticism_2023. Where do you mainly see or hear criticism of journalists or the news media in <market>? Please select all that apply. **Q1_Criticism_2023.** How often, if at all, do you see or hear people criticising journalists or the news media in <market>? *Base: Those who quite often or very often hear criticism of journalists or the news media aged 18–24 = 1,827, 25–34 = 3,039, 35–44 = 3,234, 45–54 = 3,345, 55+ = 7,948. Note: Question asked in USA, UK, Germany, Belgium, Netherlands, Slovakia, Croatia, Japan, South Korea, Taiwan, Hong Kong, and Singapore.*

Exposure to criticism from friends/family and people in the general public is particularly high in Latin American countries such as Chile, where the actions of journalists in recent times have attracted sharp criticism on social media (48% of those exposed to criticism in Chile report exposure from family/friends, 50% from the general public). In Colombia – a market also high in reported exposure to criticism from the general public (53%) and family/friends (47%) – President Gustavo Petro has been lashing out at the press on Twitter, stoking concerns that citizens may interpret his messages as permitting attacks on journalists. In Peru, a country which has been marked by recent political turmoil and which sees high levels of exposure to criticism from the general public (53%), there are rising concerns about threats and attacks against journalists. In these countries, we are reminded of how certain members of the public can take cues from political leaders and amplify sometimes forceful criticism of the press on social media platforms. It is also clear that such criticism sometimes takes the form of campaigns orchestrated by political actors with influencers and PR companies working on their behalf (see e.g. Ong and Cabañes 2019).

For further information on news media criticism, see relevant country pages (e.g. Chile, Colombia, Peru) in Section 3

FINDING THE LINE BETWEEN FAIR AND UNFAIR CRITICISM

As this chapter shows, criticism of the news media is pervasive, coming from a range of sources. In some markets, criticism is particularly prevalent from politicians (e.g. US, Turkey, Hungary), while in others it can come more often from other public figures (e.g. UK) or everyday people (e.g. Chile, Colombia, Peru). The sources and drivers of news media criticism vary from market to market.

It is important to note again that not all criticism is bad, and that a large amount of criticism does not necessarily mean that journalists are doing a poor job. As often powerful entities which also deal out their fair share of criticism – of politicians, businesspeople, celebrities, and others – this criticism sometimes comes with the territory, and some of the criticism is fair. At the same time, there are cases where a large share of criticism is driven by powerful actors systematically trying to undermine independent media, or spread by highly motivated networks of partisans attacking the media for political purposes.

In the UK, which has long had robust protections for the press, allowing journalists to engage in fierce criticism of public figures, criticisms in kind are often necessary. Criticism can make the media more accountable to the public they profess to serve and improve journalism in the process. Frequent jibes at the press from politicians, celebrities, and members of the public – which may be debated as fair or unfair, depending on the perspective – are part of public discourse. When the news media has been shown to have caused harm – such as in the wake of the phone-hacking scandal and subsequent Leveson Inquiry in the UK – criticism is important for instigating reform, just as it can be a necessary part of reckoning with how the news media have dealt with issues including, for example, climate, gender, race, and sexuality.

But in markets with less robust press protections or declining press freedoms, criticism can take on a different character. On the back of anti-media rhetoric from populist politicians and hardline leaders, coordinated harassment campaigns can become super-charged by partisans on social media, and be dangerous and harmful for those at the receiving end. The often unfair and vitriolic form of criticism which comes from this, and which is intended to silence independent voices, can overwhelm individual journalists and sometimes lead to real-world violence against them. It is in these circumstances where criticism becomes something altogether different – and more dangerous for independent journalism and news media.

2.4 The Importance of Public Service Media for Individuals and for Society

Rasmus Kleis Nielsen and **Richard Fletcher**

Public service media are in principle meant to serve the whole public. As the BBC's mission states, the UK's largest public service media organisation's purpose is 'to act in the public interest, serving all audiences through the provision of impartial, high-quality and distinctive output and services which inform, educate and entertain'.

Public service media continue to face critical scrutiny and scepticism – whether from private sector competitors, some politicians, or parts of the public – and where they exist, they are also often by far the biggest direct government intervention in the media market. In the UK, for example, Ofcom estimates that publicly funded channels account for just over 10% of total television sector revenues, online audiovisual included (down from about 25% in 2013).[18]

Even where the public service mission is accompanied by significant public funding, however, reaching the whole public, and serving everybody, is a challenging remit. Our data can help shed light on one aspect of how this is going, by documenting how important citizens feel the news side is of what public service media do – (1) for them personally, and (2) for society. This is a significant aspect of the 'public connection' that these institutions are based on, and a key part of the political legitimacy they rely on. These are subjective judgements, and not an objective assessment of how well they are delivering on their remit, or how much public value they create, but still important to understand in their own right.

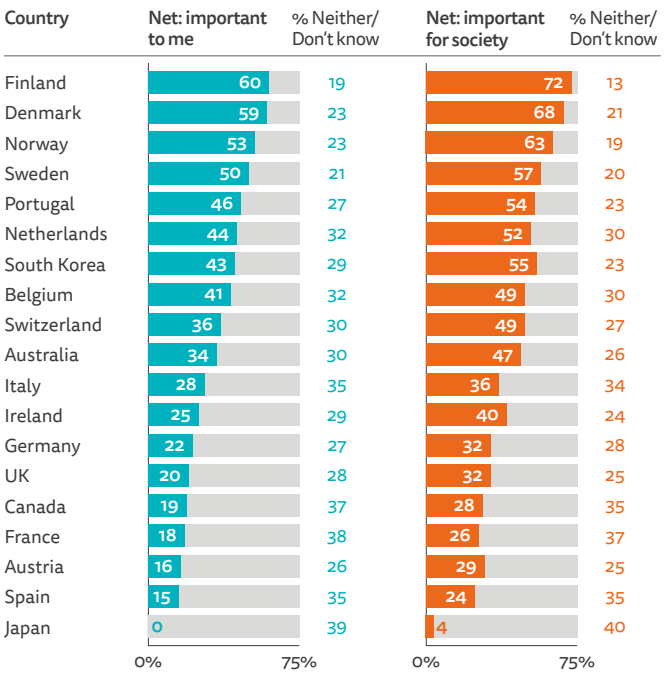
DOES THE PUBLIC THINK PUBLIC SERVICE NEWS IS IMPORTANT?

As part of this year's *Digital News Report*, we have collected online survey data on these two questions from respondents in a subset of countries home to public service media that are generally seen as being relatively independent of government.

Across these countries, the balance of public opinion overall, between those who say that public service news services are very important or quite important minus those who find these services quite unimportant or very unimportant, is shown below. (The percentage who answered 'neither important nor unimportant' or 'don't know' is reported next to the bar for each country.)

DIFFERENCE BETWEEN PROPORTION THAT THINK PUBLIC SERVICE MEDIA NEWS IS IMPORTANT VS. UNIMPORTANT – SELECTED COUNTRIES

Net importance is the proportion that said public service media is important minus the proportion that said it is unimportant.



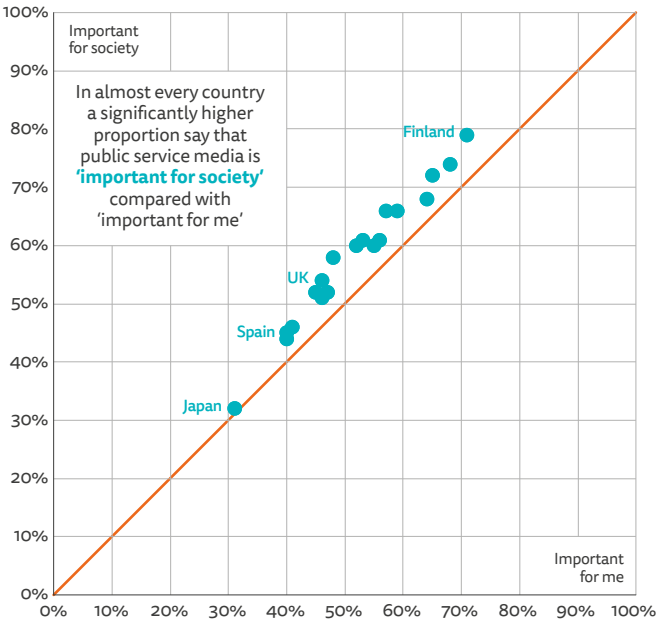
Q1_PSM_2023g_1/2. How important, or not, are publicly funded news services such as <brand> to you personally/for society? *Base: Total sample in each country ≈ 2000.*

[18] https://www.ofcom.org.uk/research-and-data/multi-sector-research/cmr/the-communications-market-2022/communications-market-report-2022-interactive-data

In about 80% of the countries covered, a majority of respondents say that public service media are important for society, and in all 19 countries, more people say important for society than unimportant. In more than half the countries, a majority of respondents say that public service media are important for them personally, and in 18 of the 19 countries, more people say important for them personally than unimportant (in Japan, the latter numbers are equal).

Respondents' views on the importance of public service media news services for them personally, and for society, are strongly related. But notably, in almost every country covered, a significantly *higher* proportion say that public service media news services are 'important for society' than say they are important for them personally. It seems that the *public* value is often clearer than the *private* value – some people see public service media as something that is good for other people even if they aren't necessarily personally all that reliant on them. But it is also clear that the number of people who believe public service media are important for others while not important for themselves is just a few percent.

PROPORTION THAT THINK PUBLIC SERVICE MEDIA NEWS IS IMPORTANT – SELECTED COUNTRIES



Q1_PSM_2023g_1/2. How important, or not, are publicly funded news services such as <brand> to you personally/for society? *Base: Total sample in each country ≈ 2000.*

WHO CONSIDERS PUBLIC SERVICE MEDIA IMPORTANT?

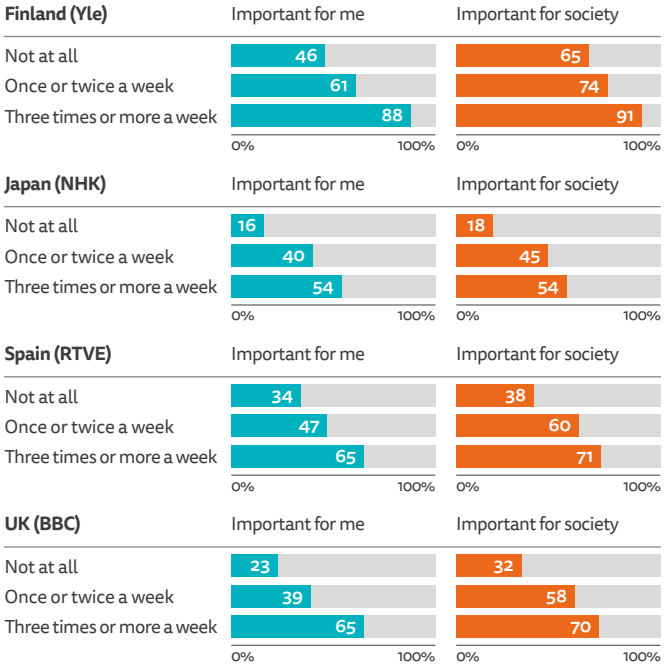
The data we have collected also allow us both to look more closely at *who* considers public service media news important and to examine, considering a sample of different countries, the relations between people's perception of the importance of public service and other factors, including (a) their experience of using public service news, (b) their social background or political orientation, or (c) their use of other sources of news.

Take using public service media first: all kinds of media content are what economists call 'experience goods', products where the value and quality can only be ascertained by actually using the good in question. This means that those who use public service news – especially those who use it regularly – may well have a different perspective on it than those who do not.

And indeed, this is what we find. If we compare across three groups – first, those who say they have not used the main public service news provider in their country in the last week, second, those who say they have used it once or twice, and, third, those who say they have used it three times or more – the differences are clear and striking.

It is not only the case that those who use public service media news services are more likely to say they are important *for them personally* (this makes sense, and the causality could go both ways). It is also the case that those who use these services – in particular those who use them frequently – are much more likely to see these services as important *for society*, perhaps in part based on the content they see. These findings clearly suggest that the breadth of public service news reach and frequency of use are important drivers of people's experience and perception of both their personal and societal importance and potentially, by extension, their political legitimacy.

PROPORTION THAT SAY PUBLIC SERVICE MEDIA NEWS IS IMPORTANT BY FREQUENCY OF PUBLIC SERVICE MEDIA NEWS USE – SELECTED COUNTRIES



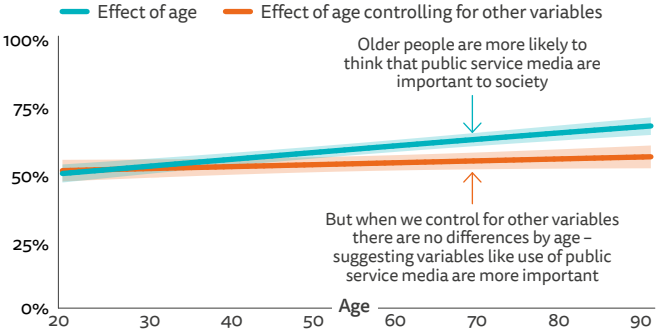
Q1_PSM_2023g_1/2. How important, or not, are publicly funded news services such as <brand> to you personally/for society? **Q5AI/BI.** You said you have used the following brands to access news offline/online in the last week ... Which of these, if any, did you use on 3 days or more? Please select all that apply. *Base: Those that used public service media news Not at all/Once or twice a week/Three times or more a week in Finland = 615/266/1,146, Japan = 1,098/194/717, Spain = 1,455/206/307, UK = 681/224/1,202.*

This is an important finding because recognising the relationship between people's experience of using public service news services and their perception of societal importance helps inform our understanding of other factors that might influence their opinion, for example, their age, level of education, or political orientation.

At a first glance, the data would suggest that, for example, younger people, those with lower levels of formal education, and those who are politically on the right are less likely than others to think that public service news services are important for society. Do these correlations hold up when also considering use? Statistical analysis suggests that only some of them do.

Age, for example, is not a significant variable when controlling for use, whereas level of education and political orientation remain significant. This means that lower perceived importance of public service media news services among younger people likely have nothing to do with age *per se*, and more to do with the fact that many younger people, who have grown up preferring digital, mobile, and platform media, have little or no experience of using these services. Young people who actually use them are no less likely than older people to see them as important. This underlines how important it is for their long-term legitimacy that public service media reach young people and serve them better.

PREDICTED EFFECT OF AGE ON LIKELIHOOD OF THINKING PUBLIC SERVICE MEDIA NEWS IS IMPORTANT FOR SOCIETY – SELECTED COUNTRIES



Note: Predictions based on binomial logistic regression model. Variables included are age, political leaning, education, and public service media use. Data from total samples in Finland, Japan, Spain, and the UK are pooled with fixed effects for country. Shaded areas show 95% confidence intervals.

Education, in contrast, is still a significant predictor of people's perception of public service media news, also when we take frequency of use into account. Those with higher levels of education are more likely to say they think public service media news services are important for society. It is not clear what the underlying causal mechanism is here, but given discussions of the relative lack of diversity in public service news media, also in terms of class, it is possible that less privileged parts of the public are less likely to see themselves and their sensibilities reflected, represented, and respected by public service media news than white-collar professionals with university degrees are. (It is probable that similar dynamics exist around lack of diversity and representation when it comes to, for example, ethnicity and religion, but our data are not detailed enough, and our sample size not large enough, to allow us to address this.)

Finally, political orientation too remains a significant predictor, also when we take frequency of use into account. Respondents who place themselves on the political left are more likely to say that public service news media are important for society than those who place themselves in the centre, those who place themselves on the right, or those who are more politically disengaged. Several different factors could contribute to this. One possibility is ideological conviction – those on the political right might be less positive about government intervention in the media market, as they might be of government intervention in any market. Another is variable trust – in several, but not all, countries, those on the left trust public service news more than others. Elite cues could also play a role, as right-wing politicians often attack public service media and those who support these politicians may take a lead from them.

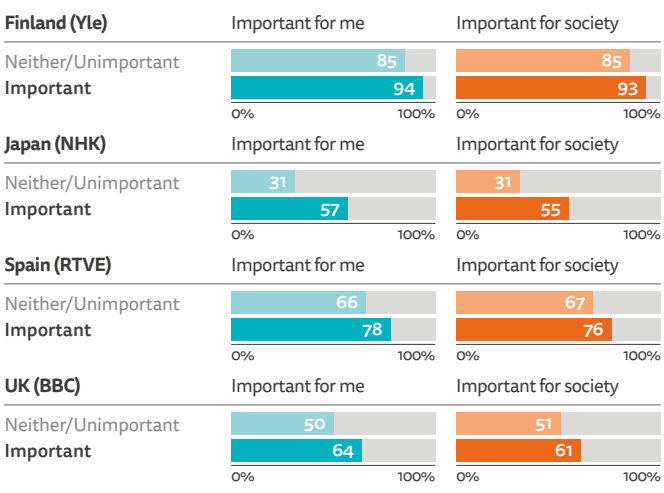
This kind of closer statistical analysis is useful both in dispelling the idea that age in itself matters and confirming that other social and political factors, including education and political orientation, do play a role. It also finds that use – personal experience of public service news – is the strongest and most consistent predictor of whether people believe public service media news services are important for society.

WHAT IS THE RELATION BETWEEN PERCEIVED IMPORTANCE OF PUBLIC SERVICE AND USING OTHER MEDIA?

An additional issue our data can help illuminate is the relationship between public service media news services and private sector competitors. For-profit news publishers often fear that public service providers will crowd them out of the market, whereas public service media often argue that their services contribute to what is sometimes called 'market conditioning', effectively increasing demand by stimulating interest and serving as a gateway to other providers. To our knowledge, no peer-reviewed academic research has found support for the crowding-out effect when it comes to news (Sehl et al. 2020), but it remains a real enough concern – and is loudly enough proclaimed – that it merits continual consideration.

One way to shed further light on this issue is to consider the relationship between people's perception of whether public service media news services are important for society and their use of other news sources, specifically the offline and online offers of newspaper publishers, who often are most concerned about crowding out. Looking again at a subset of the markets covered, we consistently find that respondents who think public service media are important for society are also slightly more likely to have used a newspaper brand offline or online in the past week. It seems that the sense of direct antagonism and zero-sum trade-offs between private provision and public service that some newspaper editorials express is not a view shared by many of their own readers. Instead, belief in the importance of public service media seems to go hand in hand with newspaper readership.

PROPORTION THAT USED A PRINT BRAND ONLINE OR OFFLINE IN THE LAST WEEK BY PERCEIVED IMPORTANCE OF PUBLIC SERVICE MEDIA NEWS – SELECTED COUNTRIES



Q5A/B. Which of the following brands have you used to access news offline/online in the last week? Please select all that apply. **Q1_PSM_2023g_1/2.** How important, or not, are publicly funded news services such as <brand> to you personally/for society? *Base: Neither or Unimportant/Important for me in Finland = 563/1,430, Japan = 1,311/622, Spain = 1,139/842, UK = 1,004/1,009 and Neither or Unimportant/ Important for society in Finland = 384/1,607, Japan = 1,277/649, Spain = 1,024/945, UK = 843/11,57.*

THE BREADTH OF PUBLIC SERVICE NEWS REACH IS CENTRAL FOR PUBLIC PERCEPTION OF ITS IMPORTANCE

In summary, a closer analysis of whether – and which – respondents feel that public service media news services are important for them personally, and/or for society, demonstrates that the experience of actually using these services is by far the strongest predictor of people's assessment of their importance. When taking use into account, other factors like age are no longer statistically significant, and factors that are – including level of education and political orientation – are still less important than use. Those with limited levels of formal education and those who are politically on the right (or disconnected) still tend to value public service if they use it, and across all groups, a belief in the importance of public service media news services often goes hand in hand with use of other sources of news in our analysis of newspaper brands (whether offline or online).

These findings have important strategic implications. If public service media at least in part base their political legitimacy on the public's experience of and belief in their importance, then the most important groups to convince are younger people, those with lower levels of formal education, and those on the political right as well as the politically disengaged. And the thing that may change their view is the experience of using public service news. In contrast, a narrower 'market failure' remit that limits public service media to specific tasks that often draw little public attention, or other incentives and forms of governance that orient them towards primarily catering to the needs and interests of older, highly educated people and those on their political left, will probably further erode public support.

2.5 News Podcasts: Who is Listening and What Formats are Working?

Nic Newman

Over the last few years, much has been written about a so-called golden age of podcasting, which many date from the launch of the true crime show Serial (2014) and a subsequent wave of 'deep dive' news podcasts such as The Daily from the *New York Times* (2017). But outside a few top shows, we still know very little about which podcasts are being consumed across countries, who uses them, or even how engaging they are for consumers.

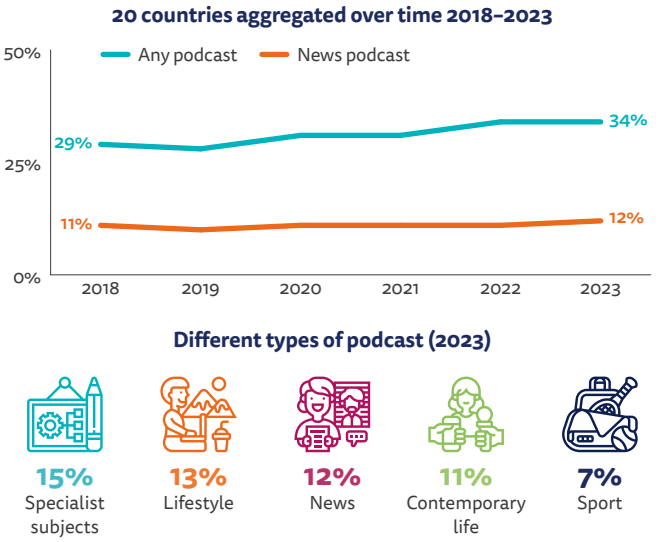
This is partly because of the lack of mature, publicly available measurement systems, with consumption fragmented across proprietary platforms such as Apple, Spotify, and YouTube. In some countries, such as Australia, the United States, and Denmark, there are published lists of top news podcasts, but these depend on active participation from news organisations and often do not provide a complete picture.

In this chapter, we rely on online survey methodologies to understand how news podcasts fit into the wider ecosystem and to identify some of the most popular news podcasts across a number of countries.

NEWS PODCAST USE STABLE AS OVERALL PODCAST MARKET GROWS

Since 2018, our survey has tracked monthly podcast use in 20 countries[19] with a well-developed podcast industry. Across these markets, overall usage has grown from just over a quarter of our sample to about a third (34%), but news podcasts have grown more slowly despite a significant increase in supply identified in multiple studies (Newman and Gallo 2019). News jostles for attention with lifestyle and specialist shows, many of which also deal with news-related subjects such as business, technology, and health.

PROPORTION THAT LISTENED TO A PODCAST IN THE LAST MONTH (2018–2023) – SELECTED MARKETS



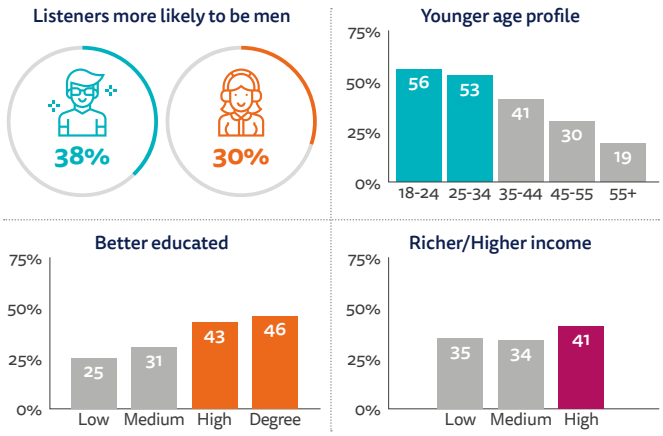
Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Please select all that apply. *Base: Total sample in each country-year ≈ 2000. Note: Question asked in UK, USA, Germany, France, Italy, Spain, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Japan, Singapore, Australia, Canada, and Argentina (since 2019).*

Podcasting may not yet be a mass market medium, but its audience profile is extremely interesting to publishers and to advertisers. Listeners tend to be richer, better educated, and crucially much younger (see chart on next page). As we showed in the Executive Summary, younger people in most countries are more likely to say they prefer to listen to news content when compared with older groups – partly because they spend so much time with mobile phones. But people of all ages find podcasts a convenient format when commuting, walking the dog, in the gym, or doing mundane tasks at home such as cleaning.

[19] The countries are UK, USA, Germany, France, Italy, Spain, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Japan, Singapore, Australia, Canada, plus Argentina (since 2019).

PROFILE OF THOSE THAT LISTENED TO A PODCAST IN THE LAST MONTH – AVERAGE OF SELECTED COUNTRIES

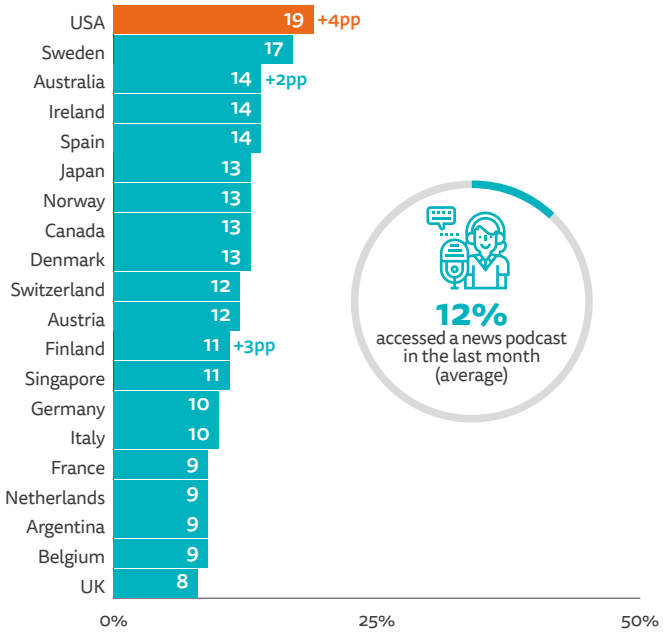
Podcast listeners are younger, richer, received more education



Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe or listen to. Which of the following types of podcast have you listened to in the last month? *Base: Men/Women = 19,751/21,151, 18-24/25-34/35-44/45-54/55+ = 3914/6449/6883/6845/16,811, Low/Medium/High/Degree education = 8447/16,894/15,561/11,467, Low/Medium/High income = 9074/15,875,9296 in UK, Japan, Germany, France, Italy, Belgium, Netherlands, Finland, Austria, Denmark, Australia, Singapore, Argentina, Switzerland, Canada, USA, Spain, Norway, Sweden, Ireland.*

Overall consumption of news podcasts is highest in the United States (19%), but lower in many European countries such as France (9%) and the UK (8%). This difference reflects the vibrancy and range of news podcast production and monetisation in the United States, which in turn has driven public awareness and strong consumption. In many European countries, the existence of high-quality output from commercial and public service radio may have made it harder for an independent podcasting sector to gain traction.

PROPORTION THAT LISTENED TO A NEWS PODCAST IN THE LAST MONTH – SELECTED COUNTRIES



Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcasts have you listened to in the last month? Please select all that apply. *Base: Total sample in each country ≈ 2000.*

DIFFERENT TYPES OF NEWS PODCASTS AND COUNTRY COMPARISONS

In addition to exploring levels of consumption, we asked survey respondents in 12 countries to name the news shows they used most often and coded these responses by publisher, type, and origin country. Typically, between 200 and 700 shows were mentioned in each country, but it is important to note that we left the definition of news and current affairs podcast open to respondents, so it is likely that some popular shows were missed. Recall methodologies will inevitably produce different results from industry data.

In categorising these shows, we extended a typology first developed for our 2019 report *News Podcasts and the Opportunities for Publishers* (Newman and Gallo 2019; also in Newman and Gallo 2020), which identified four podcast groups in ascending length order: news round-ups, deep dive podcasts, narrative documentaries, and extended chat.

NEWS PODCAST TYPOLOGY WITH EXAMPLES OF EACH

1 News round-ups
(typically 1–10 minutes)

Podcasts that update audiences briefly with multiple stories.



2 Deep dive/explanatory
(typically 20 minutes)

Examine one or two subjects in detail, narrative style with sound design.



3 Documentary
(30–40 minute episodes)

Narrative style series, same subject over multiple episodes.



4 Extended chat
(up to 4 hours)

Round-table discussions, informal style, personality-led.



Across countries, we find that personality-led 'extended chat' programmes like The Joe Rogan Experience are mentioned most often, along with 'deep dives' such as The Daily from the *New York Times*. Short news rounds-ups like Tagesschau's News in 100 Seconds from German public service broadcaster (PSB) ARD or 5 Things from CNN are also popular, often forming part of morning routines. By contrast, longer documentary series such as the investigation by ITV News into lockdown parties in Downing Street (Partygate: The Inside Story) are mentioned more rarely. In some countries, we find uneven distribution, with a few big shows dominating and a very long tail, but in others listening is more evenly spread. There is considerable cross-border listening – around 50% in some English-speaking markets.

TOP TEN NEWS PODCASTS – USA



Michael Barbaro
The Daily, New York Times



Joe Rogan
Spotify

	Podcast name	Producer	Type	Avg. episode length
1	The Daily	New York Times	Deep dive	24m
2	Joe Rogan Experience	Joe Rogan/Spotify	Extended chat	3hr 10m
3	Pod Save America	Crooked Media	Extended chat	1hr 15m
4	Up First	NPR	News round-up	13m
5	Ben Shapiro Show	Daily Wire	Extended chat	1hr 8m
6	Rachel Maddow Show	MSNBC	Extended chat	45m
7	Dan Bongino Show	Cumulus Podcast Network	Extended chat	55m
8	Morning Wire	Daily Wire	News round-up	14m
9	NPR Politics Podcast	NPR	News round-up	15m
10	Apple News Today	Apple News	News round-up	10m







TOP TEN NEWS PODCASTS – UK



Alistair Campbell & Rory Stewart
Goalhanger Podcasts

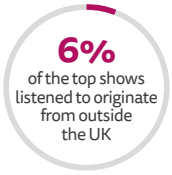


Adam Fleming
Newscast, BBC News

	Podcast name	Producer	Type	Avg. episode length
1=	The Rest is Politics	Goalhanger Podcasts	Extended chat	43m
1=	Newscast	BBC News	Extended chat	31m
1=	The News Agents	Global Media	Extended chat	35m
4	Americast	BBC News	Extended chat	42m
5	Today in Focus	The Guardian	Deep dive	29m
6	Ukrainecast	BBC News	Extended chat	32m
7	The NS Podcast	New Statesman	Extended chat	24m
8	Joe Rogan Experience	Joe Rogan/Spotify	Extended chat	3hr 10m
9	The Trawl	Jemma Forte & Marina Purkiss	Extended chat	35m
10	Oh God, What Now?	Podmasters	Extended chat	1hr 6m







Q2_Podcasts_2023. You say that you have listened to a news podcast in the last month ... which news podcasts do you listen to regularly? *Base: Those that listened to a news podcast in the last month. USA = 418, UK = 161. Note: Open-ended question. Respondents could type in up to three podcasts.*

In the United States podcasting is dominated by male hosts, most often from the right (e.g. Ben Shapiro, Dan Bongino), but sometimes from the left (e.g. Rachel Maddow). By contrast news round-ups (e.g. Up First, Apple News Today) and deep dives (e.g. The Daily) tend to have a more neutral tone. Hosting duties are often shared between men and women.[20]

In the UK, the top three podcasts are politically focused extended chat shows, two of which are daily. The BBC has created a number of original podcasts, such as Newscast and Ukrainecast, as well as repackaging versions of popular radio shows, but is facing competition from commercial broadcasters, newspapers, and other disrupters. The Rest is Politics is hosted by a former Conservative politician and a former Labour spin doctor, while The News Agents (Global Radio) is presented by three former BBC correspondents who were lured from the Corporation with big money deals and the opportunity to express more of their personal opinions. The bulk of shows in the list are created and produced in the UK.

We find a slightly different position in Australia, another country where publishers have invested heavily in original podcasts in the last few years. Here, deep dive, explanatory podcasts make up the bulk of the top-ten listings, including Full Story from the *Guardian*, ABC News Daily, and 7am from independent media company Schwartz Media. A wide range of US and British podcasts make this a particularly crowded market, with 46% of the most-listened-to shows originating from outside Australia. National broadcaster ABC News makes up around a quarter of the mentioned podcasts, ahead of the BBC (in second place).

TOP TEN NEWS PODCASTS – AUSTRALIA



Various Presenters
Guardian Australia



Samantha Hawley
ABC News Daily

	Podcast name	Producer	Type	Avg. episode length
1	Full Story/Today in Focus	Guardian Australia	Deep dive	23m
2	Joe Rogan Experience	Joe Rogan/Spotify	Extended chat	3hr 10m
3	ABC News Daily	ABC News	Deep dive	13m
4	7am	Schwartz Media	Deep dive	21m
5	The Quicky	Mamamia	Deep dive	21m
6	Sky News Daily	Sky News	News round-up	20m
7	The Daily	New York Times	Deep dive	24m
8	The Front	The Australian	Deep dive	12m
9	Jordan B. Peterson	Daily Wire	Extended chat	1hr 34m
10	Global News Podcast	BBC News	Extended chat	31m







Q2_Podcasts_2023. You say that you have listened to a news podcast in the last month ... which news podcasts do you listen to regularly? *Base: Those that listened to a news podcast in the last month = 293. Note: Open-ended question. Respondents could type in up to three podcasts.*

[20] Many programmes have dual male/female hosts, but for the purpose of this exercise we identified the first voice heard on each podcast on a particular day and categorised accordingly.

Other English-speaking markets we analysed show a similar profile, with a mix of deep dive and extended chat podcasts as well as a strong male bias in hosting. In Canada and Ireland, we find that the percentage of consumption from outside the country is even higher (about 50% in each case). In Canada, the two most mentioned podcasts were The Joe Rogan Experience and The Daily, despite domestic deep dive alternatives such as Frontburner and Ça s'explique from public broadcasters CBC and Radio-Canada.

DOMESTIC PODCASTS OUTPERFORMED BY MANY US-BASED RIVALS IN CANADA



NON-ENGLISH-SPEAKING MARKETS

News podcasts in France are dominated by public and commercial radio networks such as France Inter and RTL, along with 24-hour news networks France Info and BFM. Many of these adapt existing news programming, but there have been some notable podcast-first disruptions. La Story from financial newspaper *Les Echos* was one of the first to adopt the explanatory single-story format, and *Le Monde* has started an explanatory podcast with funding from Spotify. However, in terms of raw numbers, both of these were eclipsed in our data by journalist and YouTuber Hugo Décrypte, who produces Actus du Jour, a ten-minute podcast in audio and video that explains the news of the day for a younger audience.

NATIVE PODCASTS IN FRANCE ARE OFTEN ECLIPSED BY RADIO OUTPUT



News round-up | Deep dive | Deep dive

55% of top podcasts are repurposed shows from public service and commercial broadcasters

We find a similar situation in Spain, where many radio shows have been repackaged as chat-based podcasts. The most well-known newspapers, *El País* and *El Mundo*, have developed deep dive podcasts similar to The Daily, along with digital-born outlets such as elDiario. Younger journalists are also making an impact with hybrid audio/video shows. The Wild Project, an extended chat show presented by YouTuber Jordi Wild (11 million subscribers) covers news, sports, science, and philosophy, with episodes lasting up to four and a half hours.

EMERGING NATIVE PODCASTS IN SPAIN ARE OFTEN ECLIPSED BY RADIO OUTPUT



Deep dive | Deep dive | Extended chat

48% of top podcasts are repurposed shows from public service and commercial broadcasters

The large German market is developing in interesting ways. Public broadcasters such as ARD dominate with repurposed radio as well as native news podcasts. T-Mobile has a successful news briefing show aimed partly at smart speakers. Former print publishers such as *Die Zeit* have developed a range of podcasts, including interview show Alles GeSegt (All Is Said), which only finishes when there is nothing left to say. One interview lasted for eight and a half hours.

SMALLER COUNTRIES MAY TAKE A DIFFERENT PATH

Some of the highest levels of podcast listening in Europe are taking place in Norway, Sweden, Finland, and Denmark. In all these countries strong public broadcasters have led the charge, creating successful native podcasts in addition to reworking radio output. Danish public broadcaster DR's deep dive Genstart, launched just before the Coronavirus lockdowns, stands head and shoulders above any other, with 24% of news podcast mentions compared with 5% for the next most popular show. Overall, DR podcasts account for half (51%) of all cited news shows and are bringing a significantly younger audience. Broadcaster TV2 and commercial publishers Berlingske and Politiken compete for upmarket news audiences, while *BT* and tabloid *Ekstra Bladet* are also engaging audiences with true crime and entertainment podcasts.

TOP FIVE NEWS PODCASTS – DENMARK

	Podcast name	Producer	Type	Avg. episode length
1	Genstart	DR (public broadcaster)	Deep dive	15m
2	Orientering	DR	Deep dive	30m
3	Dato	TV2	Deep dive	15m
4	Tiden	DR	News round-up	30m
5	Det, Vi Taler Om	BT	Extended chat	55m

91% of named news podcasts are Danish, just 9% from other countries

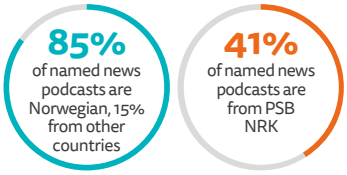
51% of named news podcasts are from PSB DR

Q2_Podcasts_2023. You say that you have listened to a news podcast in the last month ... which news podcasts do you listen to regularly? *Base: Those that listened to a news podcast in the last month = 260. Note: Open-ended question. Respondents could type in up to three podcasts.*

In Norway, public broadcaster NRK holds the top spot with its daily news podcast Oppdatert but faces competition from commercial publishers. Three of the top ten podcasts come from Schibsted brands, including Forklart (Explained), produced by upmarket *Aftenposten*, and Krimpodden, a true crime series from the tabloid *Verdens Gang (VG)*. Schibsted recently bought a podcast platform, PodMe, while another large publisher, Amedia, has invested in a podcast production company. Both have started to bundle podcasts with subscription products, with data suggesting that audio is particularly effective in building loyalty. NRK has also started to restrict access from open platforms, encouraging more people to consume via its NRK Radio app.

TOP FIVE NEWS PODCASTS – NORWAY

	Podcast name	Producer	Type	Avg. episode length
1	Oppdatert	NRK (public broadcaster)	Deep dive	15m
2	Forklart	Aftenposten	Deep dive	15m
3	Aftenpodden	Aftenposten	Extended chat	1hr 15m
4	Dagsnytt 18	NRK	Extended chat	59m
5	Urix	NRK	Deep dive	30m

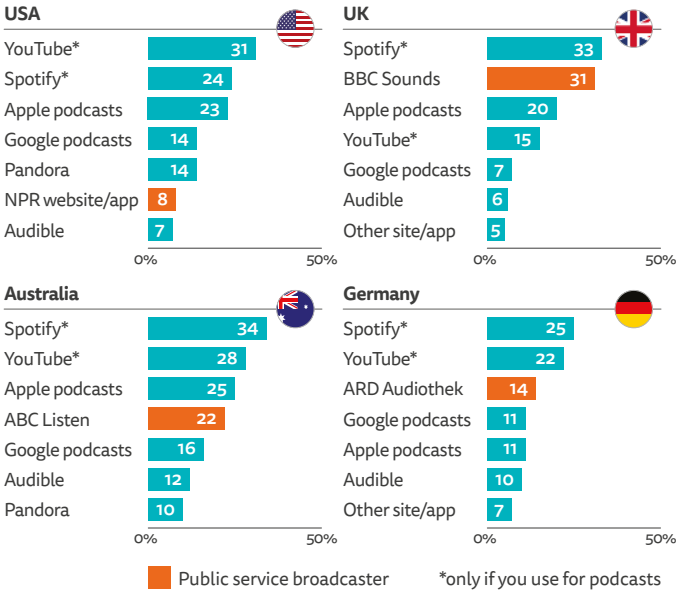


Q2_Podcasts_2023. You say that you have listened to a news podcast in the last month ... which news podcasts do you listen to regularly? *Base: Those that listened to a news podcast in the last month = 289. Note: Open-ended question. Respondents could type in up to three podcasts.*

PLATFORM ACCESS FOR NEWS PODCASTS AND THE RISE OF VIDEO PODCASTING

In larger countries, it is proving harder for publishers to compete with tech platforms as they struggle to offer the comprehensive range of content or the level of user experience desired by consumers. One exception is BBC Sounds in the UK, which has a similar reach to Spotify for podcasts, partly due to very strong promotion via its other channels. Spotify may be pulling back from some of its eyewatering investments in content[21] but has already established itself as the dominant platform in most countries, but not in the United States, where YouTube is number one. This reflects the growing importance of video podcasts – partly due to the extra reach and revenue that YouTube provides, though also because video promotion tends to be more effective in attracting attention via social media. In the United States, cable talk shows are routinely repackaged as podcasts, while the BBC's Newscast is now filmed for television and digital distribution.

PROPORTION OF PODCAST LISTENERS THAT USE EACH PLATFORM FOR PODCASTS – SELECTED COUNTRIES



POD2. Which of the following apps or websites do you mainly use to find and play podcasts? Please select all that apply. *Base: Those that listened to a podcast in the last month in USA = 891, UK = 607, Australia = 773, Germany = 574.*

CONCLUSION

Categorising the variety of news podcasts across countries is a complex and imperfect task, but it gives us some sense of the relative state of news podcasting. In the United States, Australia, the UK, and Nordic countries, we find that most consumption is of high-quality 'native' podcasts, while elsewhere, repackaged radio output tends to dominate and there is much less investment in original content.

Across markets, 'extended chat' formats seem to attract most audience attention and are attractive to publishers because they are relatively cheap to produce. In a few countries, 'deep dive' podcasts – such as The Daily from the *New York Times* and Genstart from Danish Radio – are attracting significant reach, partly due to early mover advantage and/or sustained investment – but these are very much exceptions. In most cases, attention is highly fragmented, with a relatively small audience for any one news podcast or publisher. This, in turn, makes podcasts hard to monetise through direct advertising, especially in smaller markets, leaving all but the biggest providers dependent on large platforms such as Spotify or YouTube. In some English-language markets, such as Canada and Ireland, domestic providers face further competition for attention from better-resourced US or UK podcasters. In this context, it is not surprising to see some publishers focusing less on immediate financial return and more on using podcasts as a way to attract younger audiences or deepen relationships with subscribers.

In most countries, public or commercial broadcasters continue to lead the way, but their market share is challenged by legacy print organisations, digital-born outlets, alternative media, former comedians (e.g. Joe Rogan) and academics (e.g. Jordan Peterson). Low barriers to entry in podcasting have also enabled younger voices to be heard, bringing a fresh, more informal tone, and often adding video to the mix.

Our data capture the vibrancy of the podcasting scene across countries, but current levels of audience growth are unlikely to match the amount of content now being produced, let alone the new shows in the pipeline. In this context, it is vital that news podcasts stand out – with high-quality content, strong formats, and engaging hosts still being the most important ingredients for success.

[21] https://techcrunch.com/2022/10/06/spotify-cancels-11-original-podcasts-lays-off-under-5-of-staff/

SECTION 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 different sources of news over time, the role of different social networks, and levels of payment for online news. Information is drawn from the 2023 Digital News Report survey using the methodology outlined on page 6, with the exception of population and internet levels which are drawn from the latest edition of *Internet World Statistics*[22] and press freedom scores from Reporters Without Borders.[23]

Data from India, Kenya, Nigeria, and South Africa are representative of younger English speakers rather than the national population. 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 to 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 they meet 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 ask certain questions (such as on paying for news and podcasts) because we feel these could lead to misunderstandings or misleading comparisons. We have also signalled important details about samples in a short note on the country page, where relevant.

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 UK at the start of the Europe section and the United States at the start of the Americas.

We have not published data on devices this year, because after trialling a new question we felt the data in some countries were flawed. We continue to try to provide the most accurate data possible and will reintroduce device data in 2024.

EUROPE

3.01	United Kingdom	58
3.02	Austria	60
3.03	Belgium	62
3.04	Bulgaria	64
3.05	Croatia	66
3.06	Czech Republic	68
3.07	Denmark	70
3.08	Finland	72
3.09	France	74
3.10	Germany	76
3.11	Greece	78
3.12	Hungary	80
3.13	Ireland	82
3.14	Italy	84
3.15	Netherlands	86
3.16	Norway	88
3.17	Poland	90
3.18	Portugal	92
3.19	Romania	94
3.20	Slovakia	96
3.21	Spain	98
3.22	Sweden	100
3.23	Switzerland	102
3.24	Turkey	104

AMERICAS

3.25	United States	108
3.26	Argentina	110
3.27	Brazil	112
3.28	Canada	114
3.29	Chile	116
3.30	Colombia	118
3.31	Mexico	120
3.32	Peru	122

ASIA-PACIFIC

3.33	Australia	126
3.34	Hong Kong	128
3.35	India	130
3.36	Indonesia	132
3.37	Japan	134
3.38	Malaysia	136
3.39	Philippines	138
3.40	Singapore	140
3.41	South Korea	142
3.42	Taiwan	144
3.43	Thailand	146

AFRICA

3.44	Kenya	150
3.45	Nigeria	152
3.46	South Africa	154

[22] https://www.internetworldstats.com/
[23] https://rsf.org/

SECTION 3



SECTION 3

Analysis by Country and Market
Europe

EUROPE					
3.01	United Kingdom	58	3.13	Ireland	82
3.02	Austria	60	3.14	Italy	84
3.03	Belgium	62	3.15	Netherlands	86
3.04	Bulgaria	64	3.16	Norway	88
3.05	Croatia	66	3.17	Poland	90
3.06	Czech Republic	68	3.18	Portugal	92
3.07	Denmark	70	3.19	Romania	94
3.08	Finland	72	3.20	Slovakia	96
3.09	France	74	3.21	Spain	98
3.10	Germany	76	3.22	Sweden	100
3.11	Greece	78	3.23	Switzerland	102
3.12	Hungary	80	3.24	Turkey	104



Population	**69m**
Internet penetration	**95%**

UNITED KINGDOM



The UK media scene is characterised by strong public and commercial broadcasters and a competitive and outspoken national press. But both sectors are under pressure from changing audience behaviour, falling revenue, and rising costs. The BBC's coverage of Queen Elizabeth's death was mostly sure-footed, but the corporation has been faced by rows over service cuts and impartiality.

The Queen's death and its aftermath proved a potential minefield for the BBC in a country where the majority support the monarchy but where its role is being questioned by a new, less deferential generation.[24] But the BBC's coverage on the day was mostly praised by government ministers and media critics, and watched by more than 22m in the UK via the BBC's television and streaming services. National newspapers also saw a temporary uplift in sales around royal events including the slimmed-down coronation of King Charles. But relations between the media and some members of the royal family remain difficult following a history of intrusion and underhand practices – and more recent accusations by the Duke and Duchess of Sussex (Harry and Meghan) that the press contributed to driving them out of the UK. Prince Harry is among a number of high-profile figures suing both the Mirror Group and Associated Newspapers, owners of the *Mail* and *Mail on Sunday*, over allegations that they were the victims of phone-hacking and other privacy breaches.

Newspaper groups continue to suffer from the economic downturn with the loss of hundreds of jobs. Print circulation for the biggest paid-for national titles is down by between 8% (the *i* newspaper) and 23% (the *Sunday People*), with daily local newspapers down 19% year-on-year. Reach plc (owners of the *Daily Mirror*, *Express*, and *Star*, along with around 200 local titles) announced more content sharing between its national titles and further cuts in its local operations after profits fell by 27%, hit by multiple factors including a £25m rise in print costs. Free city newspapers such as *Metro* and the *Standard*, which are distributed at major transport hubs, have been affected by the recent switch to home working – the latter lost 30% of its circulation in the last year.[25]

Some national newspapers are responding to these pressures by continuing to place a greater focus on membership and subscription-based business models, albeit within a market with a relatively low rate of paying for news online (9%). *The Times* and *Sunday Times*, part of Rupert Murdoch's newspaper stable, doubled profits to £73.2m, with 438,000 digital-only subscribers. New editorial leadership saw Tony Gallagher take over at *The Times* and Ben Taylor at the *Sunday Times*, with Emma Tucker moving to the Murdoch-owned *Wall Street Journal* in New York. The *Telegraph*, which is pursuing a subscription-first strategy, reached 586,867 paying readers in December 2022 while the *Guardian* has over 1 million recurring digital supporters.

A series of award-winning scoops from the *Daily Mirror* and ITV News about the extent of lockdown parties in Downing Street, in contravention of the government's own COVID rules, contributed to the downfall of Prime Minister Boris Johnson. He lost the confidence of his own MPs after accusations that he repeatedly misled the House of Commons over this and other issues. Later, ITV News turned the story into a true crime style podcast series, Partygate: The Inside Story, part of a wider industry trend.

Political chaos has also affected media policy, with multiple changes of Culture Secretary, further delays to the Online Safety Bill, and the watering down of its social media take-down provisions, after extensive lobbying and concerns about free speech. A controversial proposal to privatise Channel 4 has been quietly dropped under Rishi Sunak's government after industry opposition.

Meanwhile, at the BBC high inflation and soaring costs have led to the need to save £500m annually after last year's cash-flat licence fee settlement. This has led to merging the previously separate domestic and world-focused TV news channels, with a net loss of 50 jobs. At BBC World Service, hundreds of jobs are also going, along with radio output in ten languages, including Arabic.

Perceptions of the BBC's independence from government took a knock after it emerged that Chairman Richard Sharp had played a role in helping Boris Johnson's personal finances at the same time as he was seeking to secure the BBC job. Sharp was eventually forced to resign but critics unfavourably contrasted a lack of accountability for a friend of the Prime Minister with the treatment of popular sport presenter Gary Lineker who was suspended over his use of social media to criticise government refugee policy. After a public outcry, Lineker was reinstated and the BBC is to look again at impartiality guidelines for non-news staff and freelances when it comes to personal and official social media accounts.

Nic Newman
Senior Research Associate, Reuters Institute

[24] https://www.bbc.co.uk/news/uk-65326467
[25] https://pressgazette.co.uk/media-audience-and-business-data/media_metrics/most-popular-newspapers-uk-abc-monthly-circulation-figures-2/

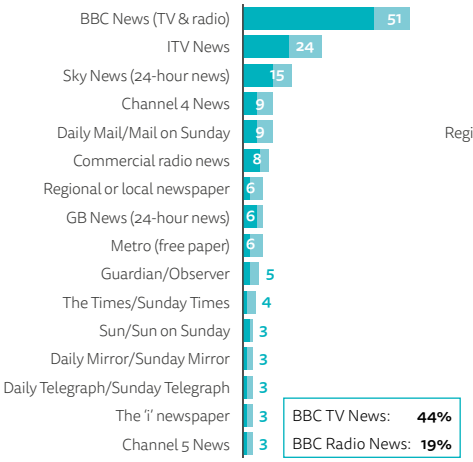
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

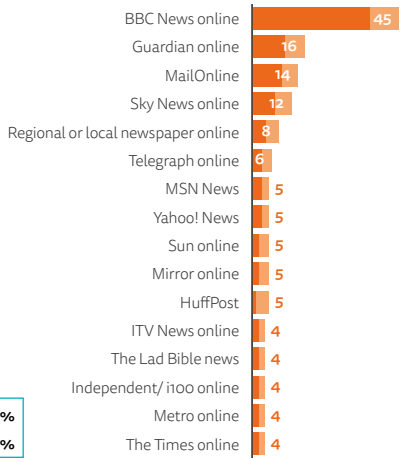
% Weekly usage

- **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



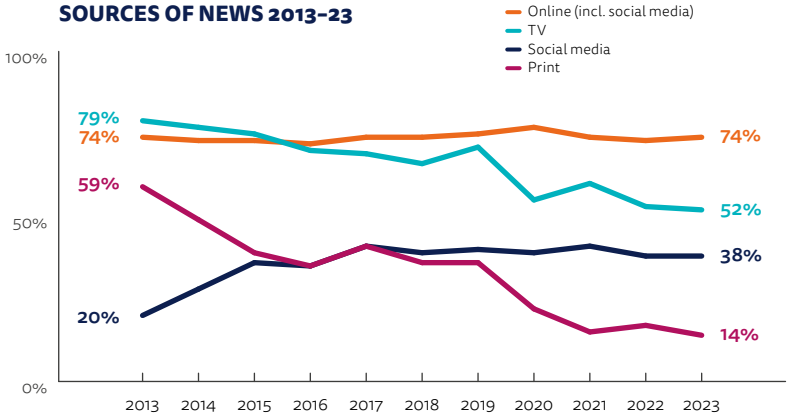
CHANGING MEDIA

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. News consumption has remained broadly stable in the last 12 months, with the exception of newspapers (-3pp).

9% pay for **ONLINE NEWS**

30% listen to **PODCASTS** in the last month

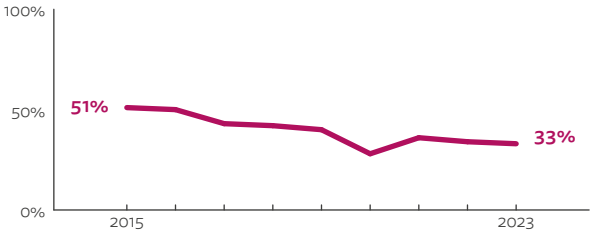
SOURCES OF NEWS 2013-23



TRUST

Public broadcasters such as the BBC, Channel 4, and ITV that are required to meet strict impartiality standards remain the most trusted news brands. Along with national broadsheet titles, all of these increased their trust levels in the last year – perhaps reflecting the less confrontational nature of politics after the resignation of Boris Johnson. More opinionated and tabloid outlets tend to have lower trust levels in our survey.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

33%
OVERALL TRUST
=33/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **78.51** **26**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
BBC News	61%	17%	21%
Channel 4 News	59%	26%	15%
Daily Mail/MailOnline	25%	24%	51%
Daily Mirror	23%	28%	48%
Daily Telegraph	41%	32%	27%
Financial Times	57%	29%	14%
GB News	28%	31%	41%
Guardian	51%	27%	22%
Independent	46%	35%	20%
ITV News	58%	26%	16%
Regional or local newspaper	53%	30%	17%
Sky News	51%	27%	21%
Sun	13%	21%	66%
TalkTV	20%	43%	37%
The Times	48%	31%	22%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

20%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	17%	(-2)	59%
2	Twitter	13%	(-)	27%
3	YouTube	10%	(+1)	54%
4	WhatsApp	9%	(-1)	65%
5	Instagram	6%	(-)	36%
6	Facebook Messenger	3%	(-1)	40%

Population	**9.1m**
Internet penetration	**88%**

AUSTRIA



The last year has been marked by several incidents indicating undue interference by politicians into news media, along with new policy measures to increase support to the industry and improve transparency over public sector advertising contracts.

In 2022, evidence of murky relationships between politicians and news media leaders emerged. Matthias Schrom, the Head of TV News at the public service media ORF, resigned after the Corruption Prosecutor's Office (WKStA) released WhatsApp chats demonstrating his willingness to accommodate complaints from former Vice Chancellor Strache about unfavourable coverage. Around the same time, an investigation into alleged bribery and corruption involving Thomas Schmid, a former Austrian People's Party (ÖVP) top official in the Finance Ministry, revealed conversations with Rainer Nowak, the former editor-in-chief, publisher, and managing director of the newspaper *Die Presse*. In these conversations, Schmid expressed gratitude and support for Nowak's ambitions to become ORF's Director General.

In the event, the ORF appointed a different Director General, Roland Weißmann, viewed by critics as a highly politicised choice, although the governing parties are entitled to appoint the majority of the board, who then appoint the director. ORF's funding system is set to be changed by January 2024, following a decision by the constitutional court. The current TV licence fee, based on the presence of a TV or radio set in a household, will be replaced by a household levy similar to the German and Swiss models. Additionally, ORF has to cut costs, by €300m, before 2026.

The government has also been reviewing its wider media policy as it applies to the press. After recent scandals, there are new rules aiming at increasing transparency about how advertising by public institutions (worth €225m in 2021) is allocated to different publishers, following suggestions that political parties and leaders can influence coverage by leveraging advertising spend. Politicians' constant attempts at influencing the press were cited in the 2023 Press Freedom Index from RSF, where Austria was ranked 29th, far from the 11th place it had in 2018.

The media policy package supplements existing subsidies of around €8m pa with an extra €20–25m pa aimed at supporting quality journalism, linked to factors such as the number of journalists and foreign correspondents, and effective gender equality plans. The package also seeks to promote content diversity by supporting greater reporting of regional events, along with EU and international topics. A new subsidy of €70m was created for digital transformation projects at news companies. The scheme may continue, although the amount of future funding remains unclear.

Austria still has a high level of readership of print (40% in our survey) but as print declines, some brands are placing their hopes on digital subscriptions. A minority (14%) of our survey respondents report paying for news online, with the main titles mentioned being *Die Presse*, *Kronen Zeitung*, and *Der Standard*. Data from the Austrian Circulation Control (ÖAK) office show *Die Presse* with nearly 60,000 subscribers, of which just over 40% are digital, *Kronen Zeitung* with 523,000 subscribers, 6% of which are digital, and *Der Standard* with 46,000 subscribers, of which 24% are digital. However, among our respondents paying for online news, 30% say they get a reduced or free rate.

The overall picture for newspapers is difficult, faced with rising paper and energy costs and a 5% drop in 2022 in subscription sales for the top ten dailies. The impact was evident in April 2023, when two prominent cases of struggling newspapers emerged: *Kurier* announced the layoff of about 10% of its 200 staff, while *Kleine Zeitung* offered voluntary redundancy to all editorial staff.[26]

Red Bull, which owns the television channel Servus TV, ranked third for weekly use in our survey, is now estimated to have a brand value of nearly €6 billion, making it the most valuable brand in Austria. However, the company lost its founder and main owner when Dietrich Mateschitz died in October 2022.

An April 2022 Gallup survey of 1,000 respondents found that, while 63% had a very or quite high-level trust in Austrian media's reporting on the war in Ukraine, only 45% considered it independent of the government's position; with 31% either not trusting (14%) or sceptical (17%) of the reporting. Reporting of COVID-19 has also been contentious, with similar levels of distrust both of the vaccine and the reporting. One right-leaning digital-born site wochenblick.at was criticised by the Press Council for multiple ethics violations in its reporting on COVID-19, including an article arguing that the immune systems of billions of people were at risk from the vaccines.

Sergio Sparviero and **Josef Trappel**, with additional research by **Stefan Gadringer** and **Pauline Reichenberger**
University of Salzburg

[26] https://www.derstandard.at/story/2000145455253/kurier-verlag-streicht-20-jobs-redaktion-kritisiert-strukturelle-versaeumnisse

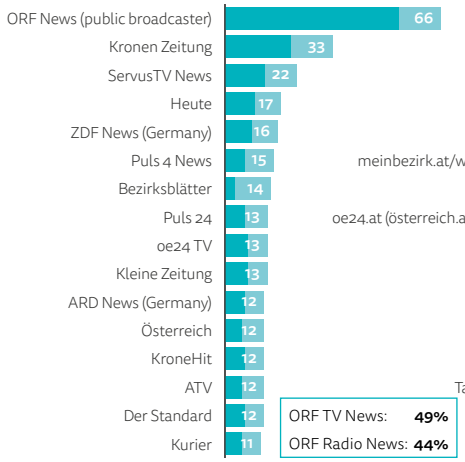
WEEKLY REACH OFFLINE AND ONLINE

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



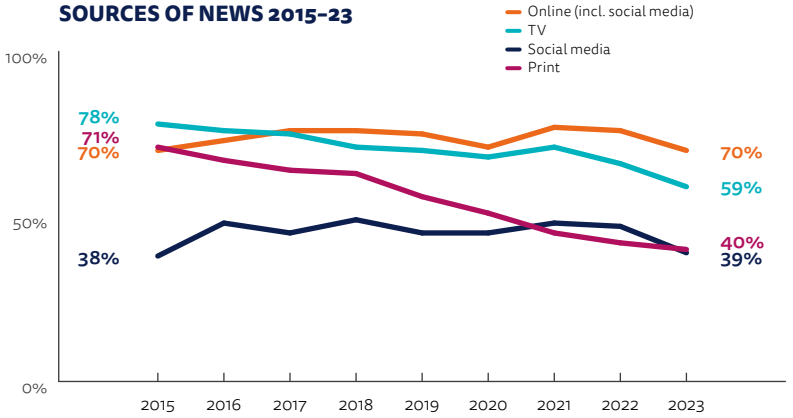
CHANGING MEDIA

Austrians still have one of highest rates of daily newspaper readership in the world, but the proportion accessing weekly has fallen by 30pp since 2015. TV audiences are also down significantly, particularly with younger people.

14% pay for **ONLINE NEWS**

34% listen to **PODCASTS** in the last month

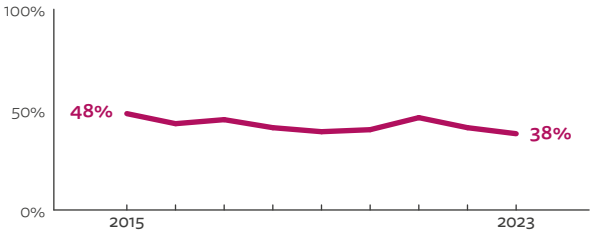
SOURCES OF NEWS 2015-23



TRUST

Trust in media has seen an 8pp drop since the 2021 COVID-19 peak, probably hit by the recent scandals involving politicians and prominent media personalities. But this only brings trust levels back close to the 2019 figure. Trust levels by brand are very similar to last year, with public broadcaster ORF News the most trusted brand, closely followed by *Der Standard* and *Die Presse*.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

38% **OVERALL TRUST =24/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **77.3** **29**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
ATV News	40%	27%	33%
Der Standard	58%	18%	24%
Die Presse	56%	21%	24%
Heute	31%	22%	47%
Kleine Zeitung	45%	27%	28%
Kronen Zeitung	43%	20%	38%
Kurier	49%	23%	28%
NEWS	40%	29%	30%
oe24	35%	23%	42%
OÖ News	46%	27%	27%
ORF News	61%	16%	24%
Puls 4 News	45%	26%	29%
Regional or local newspaper	53%	26%	21%
Salzburger News	51%	25%	24%
Servus TV News	52%	20%	28%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

25% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	24%	(-3)	52%
2	YouTube	21%	(-1)	59%
3	WhatsApp	20%	(-4)	72%
4	Instagram	13%	(-2)	35%
5	TikTok	6%	(+2)	15%
6	Twitter	5%	(-)	11%

Population	**11.7m**
Internet penetration	**92%**

BELGIUM



Belgium has two distinct media markets: French-speaking Wallonia and Flemish-speaking Flanders. Publishers' pivot to digital subscriptions seems to be paying off, even if online audience growth and paying for news may have hit their peak.

In Belgium, the slowing interest in news after the COVID-19 bump persists. The constant need for information about the energy crisis and war in Ukraine is less acute than during the pandemic. Industry figures from the Centre of Information on the Media (CIM) show, taking newspapers' combined audience across print and digital together, that their audience declined by 2.7%. The picture differs by region. In Flanders, all newspaper brands except *De Tijd* see their combined reach decline. In Wallonia, 'quality' newspapers, particularly *La Libre*, *Le Soir*, and *L'Echo*, are on the rise – although this is likely to be caused by a better representation of respondents from Brussels in CIM's updated methodology. Overall, however, we are simply seeing combined online and offline reach for newspaper and news magazine brands returning to pre-COVID levels.[27]

Surprisingly, this drop in readership has not led to a fall in turnover. Major media groups like Mediahuis, DPG Media, and Roularta remain profitable in the face of challenges. Mediahuis, for example, had slowing subscription growth and increasing costs last year, but still managed to increase turnover due to its expansion strategy; more foreign acquisitions, sharing back-office costs across subsidiaries, and increased subscription income meant a reduced but healthy profit margin. Clearly, relying on higher subscription revenues alone is not enough, and might not be in the future as, according to this year's *Digital News Report* data, paying for news is declining slightly – with 16% of Flemish and 14% of Wallonian news users paying for news in the last year, down from 18% in both regions in 2022. The top brands Digital News Report survey respondents mention paying for online are *Het Laatste Nieuws*, *Le Soir*, and *De Morgen*.

News organisations are also responding to the popularity of Instagram and TikTok by starting their own channels. VRT and HLN led the way last year, and now the 'quality' news brand *De Standaard* has entered the TikTok arena. The challenge is that, unlike Facebook, these platforms do not send traffic direct to news sites, so it is unclear how this bet will turn out. The same is true for podcasts. At a time when our survey shows podcast use for news stagnating in Belgium, some key news brands are arriving late to the podcast party. *De Tijd* and VRT with their respective daily current affairs podcasts De 7 and Het Kwartier are just a couple of striking examples.

Meanwhile, the Flemish government is taking steps to support digitalisation, with its innovative use of EU COVID recovery funding to grant €35m to make the Flemish media sector more resistant to big tech. Project calls cover the better use of data, combating disinformation, and transforming local broadcasters.[28] One planned project is a partnership between the CIM and multiple media companies for a cross-media audience metrics system.

These forms of digital support coincide with questioning of the much larger print subsidies. After years of criticism led by online-only news organisations, the government has commissioned an audit of its support scheme for the distribution of printed newspapers. This follows a scandal about the awarding of these contracts. The government's recent decision to cut this print subsidy from €170m to €120m demonstrates that the policy has passed its sell-by date.

While new support schemes aim to secure the future of the media sector in a 'post-truth' and 'fiercely digital' world, several newsrooms are under pressure. French-language public broadcaster RTBF itself hit the headlines in February 2023 after a former RTBF journalist took his life. The event triggered an outcry with employees and journalism organisations denouncing management for an uncaring push to digital first. This coincided with results from an independent study reporting that 38% of RTBF's employees said they were completely exhausted.[29] Similar stories emerged at the news division of Flemish public broadcaster VRT NWS, where journalists asked for more attention to wellbeing at work, a reduced workload, and increased resources.

Ike Picone
Associate Professor of Journalism and Media Studies, Vrije Universiteit Brussel

[27] P. Laloux, 'Le Belge lit moins de journaux, sauf "Le Soir"', *Le Soir*, 13 Oct. 2022.
[28] Department of Culture, Youth and Media of the Flemish Government. https://www.vlaanderen.be/cjm/nl/nieuws/35-miljoen-voor-relanceplan-mediasector
[29] J. Baloni, 'La grande fatigue de la RTBF après le suicide d'un journaliste', *L'Echo*, 18 Feb. 2023.

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

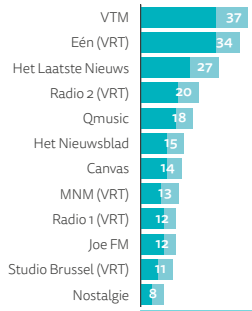
15% pay for **ONLINE NEWS**

Flemish 16% | French 14%

27% listen to **PODCASTS** in the last month

Flemish 27% | French 28%

TV, RADIO AND PRINT (FLEMISH SPEAKING)

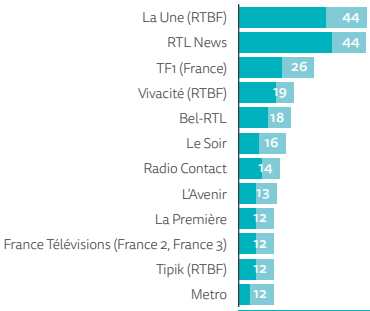


VRT (Public broadcaster) total reach: **60%**

ONLINE (FLEMISH SPEAKING)

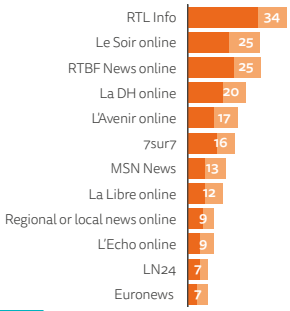


TV, RADIO AND PRINT (FRENCH SPEAKING)



RTBF (Public broadcaster) total reach: **64%**

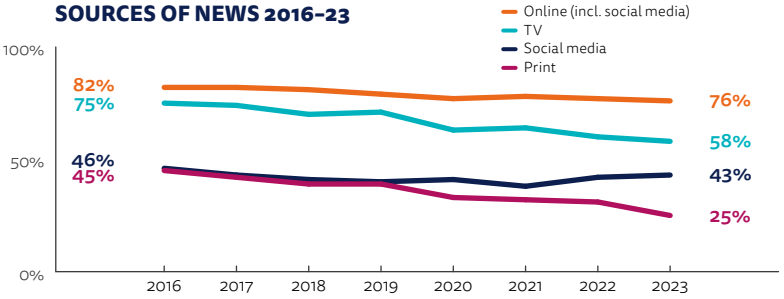
ONLINE (FRENCH SPEAKING)



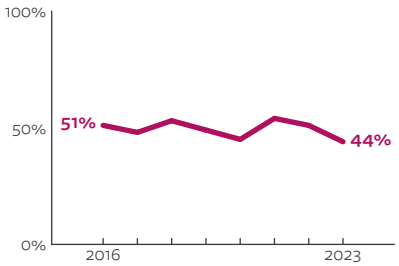
TRUST

The COVID-19 trust bump has now completely evaporated, with overall trust in news back to its pre-pandemic levels. Flemish-speaking Flanders (51%) and French-speaking Wallonia (36%) continue to feature a significant trust gap. In both markets, the respective public broadcasters VRT and RTBF remain the most trusted news sources, even though various commercial organisations feature similarly high trust scores.

SOURCES OF NEWS 2016–23



TRUST IN NEWS 2016–23



44%
13/46 markets
Flemish 51%
French 36%

Proportion that trusts 'most news most of the time'

BRAND TRUST SCORES

Only the below brands were included in the survey so it should not be treated as a list of the most or least trusted brands as it is not exhaustive.

FLEMISH

Brand	Trust	Neither	Don't Trust
De Morgen	65%	25%	10%
De Standaard	70%	22%	7%
De Tijd	69%	23%	9%
Gazet van Antwerpen	62%	26%	11%
Het Belang van Limburg	62%	27%	11%
Het Laatste Nieuws	64%	22%	14%
Het Nieuwsblad	66%	23%	11%
Joe FM	60%	28%	12%
Knack	64%	24%	11%
Qmusic	62%	26%	12%
Radio 1	72%	20%	9%
Radio 2	71%	20%	9%
Regional or local newspaper	67%	23%	10%
VRT Nieuws	76%	16%	9%
VTM Nieuws	71%	18%	11%

FRENCH

Brand	Trust	Neither	Don't Trust
7sur7	45%	37%	17%
Bel-RTL	57%	27%	16%
France 2	57%	30%	13%
La Dernière Heure	52%	32%	16%
La Libre	56%	32%	12%
La Première	60%	28%	11%
L'Avenir	53%	35%	13%
Le Soir	63%	27%	11%
Metro	45%	41%	15%
Radio Contact	49%	34%	16%
Regional or local newspaper	55%	32%	14%
RTBF News	68%	20%	12%
RTL	60%	22%	18%
TF1	58%	26%	16%
Vivacité	58%	30%	12%

Q6_brand 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'. Details: 6-10 coded as 'Trust', 5 coded as 'Neither', 0-4 coded as 'Don't Trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	38%	(-1)	70%
2	YouTube	17%	(-2)	54%
3	WhatsApp	15%	(-1)	58%
4	Instagram	14%	(+2)	41%
5	Facebook Messenger	12%	(-2)	54%
6	TikTok	7%	(+1)	18%

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **76.47** **31**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

Population	**6.9m**
Internet penetration	**70%**

BULGARIA



The election of the centrist pro-Western government of Kiril Petkov's 'We continue the Change' party in November 2021 had seemed to herald a definitive end to the often corrupt 12-year rule of authoritarian Boyko Borisov. But the Ukraine war has polarised politics between pro-Western and pro-Russian groups.

Petkov's government collapsed after less than eight months and was succeeded by multiple caretaker governments. In the 2 April elections – the fifth in two years – Borisov's centre-right party emerged ahead of the pro-Western coalition and he may be set to return to power. Bulgaria has been an EU member for over 15 years but remains among the poorest and most corrupt countries in the Union and the Ukraine war has exacerbated the sometimes ambivalent relations between the two.

As the EU became more hostile to Russia and vocal in its support for Ukraine, pro-Russian elements in Bulgaria voiced their concerns. The Ukraine war and successive election campaigns have also fuelled internal divisions. Young and urban Bulgarians have reaffirmed their pro-Western stance and demanded increased Bulgarian support for Ukraine. Meanwhile, pro-Russian sentiment among largely elderly and rural Bulgarians has deepened.

Economically, Bulgaria is unusual in the EU in having benefited from the war – with 3% growth in 2022. Growth has largely been driven by massive arms sales for Ukraine – but initially this was not officially acknowledged – and the weapons and Soviet-era ammunition were sold via intermediaries in Poland and Romania rather than being sent direct to Ukraine.[30]

Economic growth has not addressed the long-standing fragility of the media sector, now made worse by increased paper costs. Over the past year, a couple of smaller newspapers have closed, unable to adapt to digital. Most domestic media feel the need to stay close to power. The public broadcasters BNR and BNT had long been accustomed to doing so. Commercial firms often want to secure state-supported advertising. The two leading offline brands, NovaTV and BTV, are foreign owned by United Group and Central European Media Enterprises (CME) respectively. Nova has benefited from the greater editorial independence made possible by foreign ownership while BTV prioritises maintaining good relations with whichever government is in power. RSF reports that investigative journalists are regularly victims of abusive legal procedures, and corporate pressures persist. A recent court case brought by a major insurance company against the site Mediapool.bg claimed record damages for an article criticising its business practices. The €510,000 sought – more than double the firm's annual revenue – is likely to deter others from similar investigations.

Most media outlets have adopted largely pro-EU and pro-Western positions in the past year. But polls suggest that public opinion is quite balanced. Whereas an autumn 2022 Eurobarometer poll found that 74% of all EU citizens approved of EU support for Ukraine, in Bulgaria the figure was only 48%, placing the country equal lowest with Greece. Opinion on Bulgaria joining the euro seems quite volatile. In April 2021 Eurobarometer recorded 54% in favour and 44% against but this had switched to 44% in favour and 54% against by April 2022. A more recent November 2022 poll on the issue[31] for the Ministry of Finance showed Bulgarians polarised, with support from 33% of the population (compared with two-thirds of businesses) and opposed by 50%, but the policy is supported by most media and will be accompanied by a €5m government advertising campaign.

Bulgarians seem reluctant to pay for online news. But there are plenty of other digital innovations. Legacy media have recognised the interest from viewers and advertisers in user-generated content created by YouTubers, podcasters, and TikTokers and several newspapers, news sites, and radio stations are playing catch-up, launching their own virtual studios. The most significant digital moves are from TV stations. BTV launched podcasts hosted by its most popular journalists together with a business news platform. Nova is developing its own platform Vbox7 – a Bulgarian alternative to YouTube – providing a platform and tools for multiple individual creators and then selling advertisements against the content and traffic they generate.

Direct messaging social media networks such as Viber and Telegram have been growing in popularity, in part because they facilitate avoiding legal restrictions or Facebook's community standards. For example, while it is illegal in Bulgaria to publish exit poll results on election day, communicating them via direct messaging is allowed. But many have also voiced concerns about the role of social media – as the preferred Russian medium for influence – in the spread of disinformation in Bulgaria.[32]

Stefan Antonov
Business Journalist and former Reuters Institute Journalist Fellow

[30] https://www.euractiv.com/section/elections/news/guns-and-roses-bulgaria-arms-trade-booms-on-ukraine-war/
[31] https://sofiaglobe.com/2022/12/19/bulgarians-polarised-about-euro-adoption-alpha-research-poll/
[32] https://www.politico.eu/article/bulgaria-ukraine-russia-war-nato-fault/

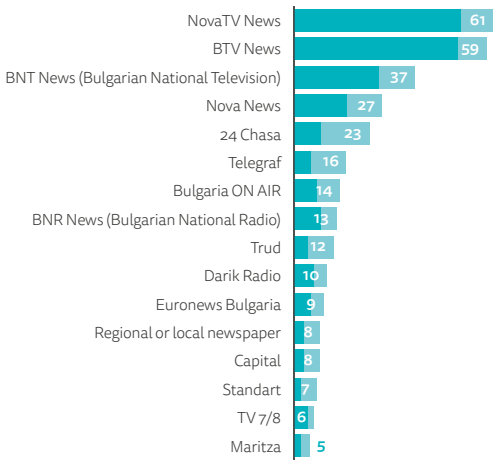
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

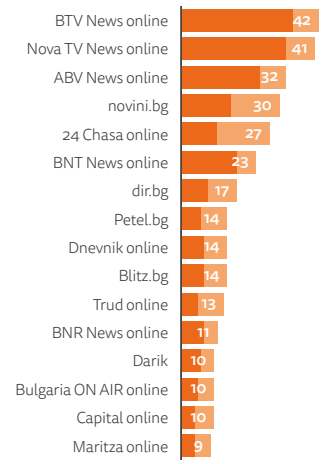
% Weekly usage

- 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



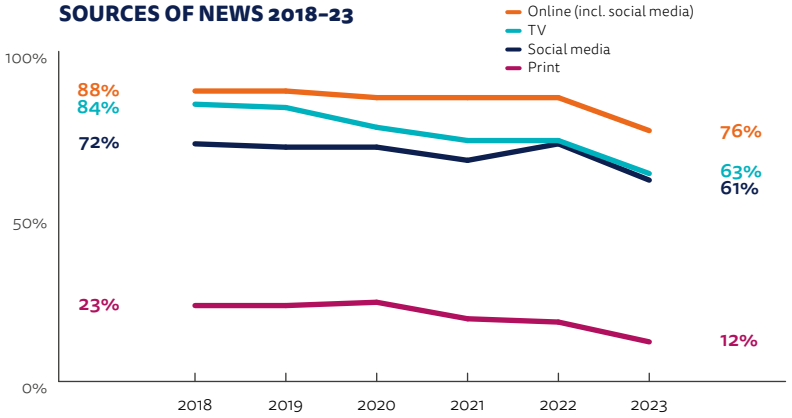
METHODOLOGY NOTE

We introduced education quotas for the first time in Bulgaria as part of our efforts to make data as representative as possible of national populations. As a result, 2023 data will be more accurate but not always directly comparable with previous years.

11% PAY

pay for
ONLINE NEWS

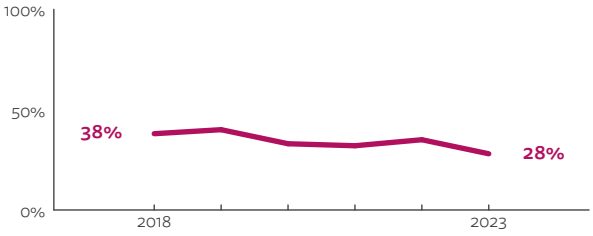
SOURCES OF NEWS 2018–23



TRUST

Overall trust in news is low, with Bulgaria now equal 41st out of 46 markets. TV and radio brands – including both the public service and top two commercial stations – are the most trusted. Euronews Bulgaria TV was surveyed for the first time this year and its high-quality journalism and brand value may explain its relatively high trust rating (50%).

OVERALL TRUST SCORE 2018–23



Proportion that trusts 'most news most of the time'

28%
OVERALL TRUST
=41/46 markets

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2023** Score: **62.98** **71**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
24 Chasa	44%	30%	26%
ABV News	38%	35%	27%
Bivol	40%	29%	30%
BTV News	53%	21%	26%
Bulgarian National Radio	59%	23%	18%
Bulgarian National Television	59%	21%	20%
Capital	43%	28%	28%
Darik	53%	26%	20%
Dir	40%	32%	28%
Dnevnik	42%	31%	27%
Euronews Bulgaria	50%	29%	21%
Nova TV News	56%	22%	23%
Novini	47%	31%	22%
Regional or local newspaper	44%	30%	26%
Trud	42%	30%	28%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

35% SHARE

SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	64%	(-5)	77%
2	YouTube	31%	(-3)	64%
3	Viber	21%	(+3)	60%
4	Facebook Messenger	18%	(+1)	56%
5	Instagram	13%	(-)	35%
6	TikTok	12%	(+4)	30%

Population	4m
Internet penetration	93%

CROATIA



The Russian invasion of Ukraine was the most important news topic in 2022 and early 2023. But COVID-19's impact is reflected in a turn to entertainment programmes, with some uptick in advertising revenues but with most growth going to online. The structure of the news industry remains largely the same – with offline use dominated by two foreign-owned TV news channels together with the public broadcaster.

Croatian publishers are continuing to suffer from the impact of COVID, given their heavy reliance on advertising. While the overall advertising market saw some increase in the past year, up from €200m in 2021 to €239m in 2022, €110m went to online advertising with 21% growth in 2022 and a forecast of a further 12% increase in 2023. The largest share (41%) was display advertising, with 30% going to social networks (Facebook and Instagram account for over 90%) and 20% to search engines.[33] In terms of the division between media outlets, TV holds the lion's share of advertising while print continues to decline.[34] The proportion of our survey respondents paying for online news remains persistently low at 8%, so it seems increased efforts to increase subscriptions have not been very successful.

The major commercial TV companies have been foreign-owned for over two decades, with the United Group operating the cable news channel N1 and the top ranked free-to-air station, Nova. Meanwhile the Czech-based CME has owned RTL TV for the past year. When it comes to print, Austrian and German companies dominate the market. The tabloid *24 Sata* owned by the Austria Styria group is the best-selling newspaper and also attracts large numbers of people online.

The public broadcaster HRT has stable and independent financing through a compulsory licence fee, but also has some advertising income. However, the recent annual report to parliament by the newly appointed Director General of HRT highlighted the need to focus on cutting costs to secure the company's future viability. While HRT claims it is editorially independent as required by law, it is less trusted than the leading commercial operators, and many industry and academic experts highlight its continuing pro-government bias.

The past year saw increased competition for prime-time news audiences between the three national TV channels since they all now broadcast their main evening news at 19.00. According to the routine monitoring figures from the regulator, the Agency for Electronic Media (AEM), while NovaTV news took the lead in the first week of the change, HTV evening news was among the ten most watched programmes in February 2023. HTV 1 had the largest all-day audience during February (18.1%), followed by two foreign-owned commercial stations, NovaTV (14.5%) and RTL TV (14%). In prime time the order is reversed with RTL TV in the lead.

There are though some signs of a weariness with news in the past year. The Russian invasion of Ukraine revived memories of the trauma of Croatia's battle to break from Yugoslavia in the 1990s, and following COVID and now Ukraine there may be a turn to entertainment. The most watched television programme in February 2023 was the Croatian Eurovision Song Contest competition, and the past year was marked by the Croatian football team's bronze medal in the World Cup.

Journalism continues to be a difficult profession in Croatia and the economic pressures imposed by the pandemic on the news industry only added to the lack of job security faced by many. While physical attacks on journalists are unusual, threats and verbal attacks continue, especially against those with opposition or liberal viewpoints as well as investigative journalists. According to the Croatian Journalists Association, there were more than 900 lawsuits for damages to reputation or honour still active in the past year and these add to the pressures on freedom of expression.[35] Even if most of those eventually fail in court this can take years. And since large amounts of damages are usually sought against individual journalists or the publishers (often online portals) they have a chilling effect on freedom of expression and contribute to self-censorship.

Following widespread coverage of corruption cases linked to governing party HDZ officials, the government plans a clampdown on leaks to journalists. The measure would target leaks by officials to the media of similar content from high-profile corruption investigations. Unsurprisingly, the plans have been met with protests from the public and journalists.

Zrinjka Peruško
Centre for Media and Communication Research, University of Zagreb

[33] https://seenews.com/news/online-media-adex-in-croatia-to-rise-12-in-2023-research-817514
[34] https://hura.hr/istrazivanja/medijska-potrosnja-u-hr/
[35] https://www.hnd.hr/zovko-slapp-tuzbe-su-novi-oblik-zlostavljanja-novinara

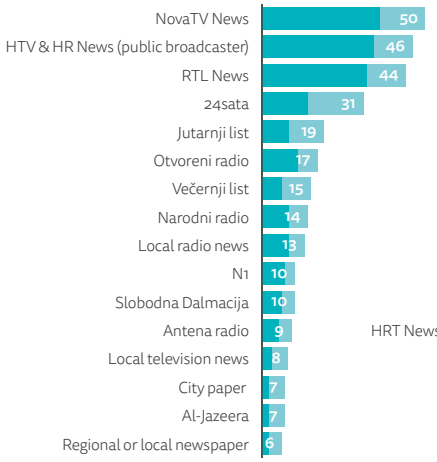
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

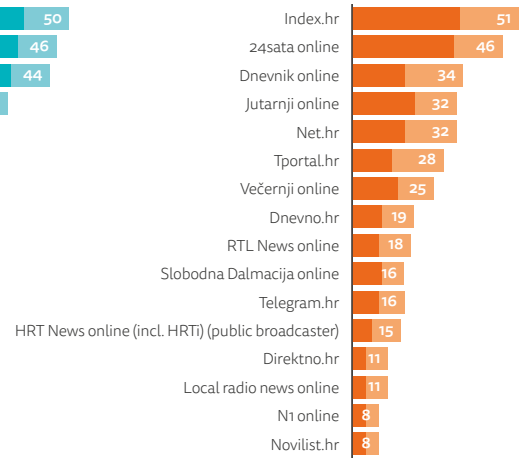
% Weekly usage

- 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

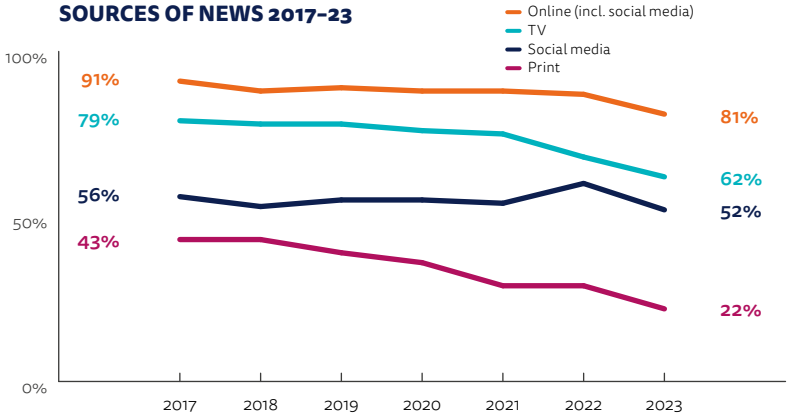
We introduced education quotas for the first time in Croatia as part of our efforts to make data as representative as possible of national populations. As a result, 2023 data will be more accurate but not always directly comparable with previous years.

8%



pay for
ONLINE NEWS

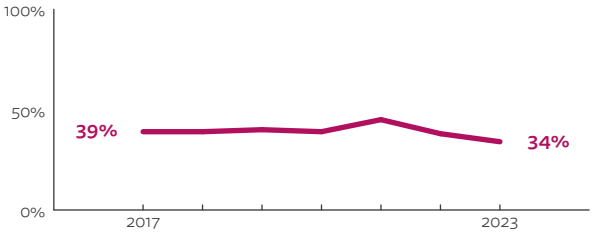
SOURCES OF NEWS 2017–23



TRUST

Overall trust in news is at a similar level (34%) to that seen in many other Southern and Eastern European countries. This year's fall reflects a further decline after the pronounced COVID-19 bump seen in 2021. Trust is highest among legacy broadcast brands such as NovaTV (63%) and RTL (58%).

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

34%
OVERALL TRUST
=31/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023

Score: **71.95**

42/ 180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
24 sata	43%	31%	26%
Dnevno.hr	42%	33%	25%
HTV News (public television)	49%	26%	25%
Index.hr	43%	26%	30%
Jutarnji list	49%	29%	22%
N1	47%	33%	20%
Net.hr	42%	35%	23%
NovaTV	63%	23%	14%
Otvoreni radio	53%	33%	14%
Regional or local newspaper	50%	33%	17%
RTL News	58%	25%	16%
Slobodna Dalmacija	42%	36%	22%
Telegram	40%	35%	25%
Tportal.hr	42%	35%	22%
Večernji list	49%	31%	20%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

28%



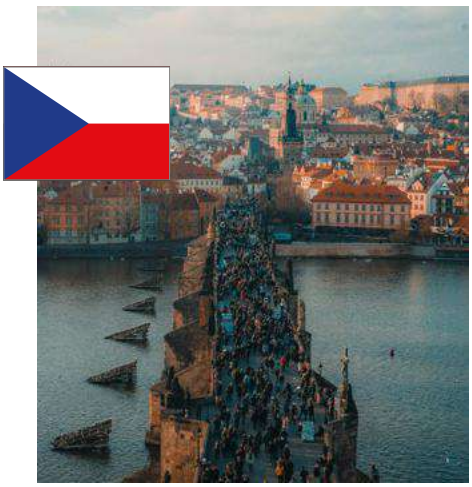
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	53%	(-4)	71%
2	YouTube	27%	(-3)	70%
3	WhatsApp	19%	(-1)	64%
4	Instagram	14%	(-)	42%
5	Viber	13%	(-2)	49%
6	Facebook Messenger	11%	(-1)	46%

Population	11m
Internet penetration	87%

CZECH REPUBLIC



Just as the media market started showing signs of recovery after the pandemic, it had to cope with the energy crisis and rising inflation. The war in Ukraine also tested the country's resilience against disinformation, and there are intensified calls for more systemic measures to counter this.

The advertising market continued its return to the pre-COVID levels of growth in the first half of 2022, but the rebound stopped towards the end of the year, following the country's plunge into economic recession and the second-highest inflation rate in Czech history (+15%). Dramatic cost increases have hit newspaper publishers hard, with many cutting budgets and journalists. In addition, a dozen outlets ceased publishing, mostly blaming the rising cost of paper. However, the largest Czech digital company, Seznam, was also hit, reportedly cutting staffing on its news website Seznamzpravy.cz by 11%,[36] and closing its television station TV Seznam.

On the other hand, parts of the digital media market have enjoyed further growth, especially online video on demand. Following the arrival of Disney+ in June 2022, another global streaming platform – SkyShowtime – launched its services for Czech customers in February 2023, and the leading Czech commercial TV network Prima added its own platform Prima+ as well. The popularity of news podcasts has also been increasing. In a search for new revenue sources, Seznam launched the Seznam Medium blogging platform in late 2022. Modelled on Medium.com, it allows users the opportunity for their blogs to appear on the Seznam.cz homepage (once the article receives 100,000 views), and to earn up to half of the advertising revenue generated.

In November 2022 – just a year after its launch – Google added to the sector's woes in announcing the end of its News Showcase programme, which had provided eight Czech newsrooms with an extra source of revenue. Furthermore, both Google and Meta have stopped displaying snippets from Czech news websites on their platforms, hitting traffic and consequently advertising income. This was in reaction to an amendment to the Copyright Law (transposing the provisions of the EU's DSM Directive into the Czech legislation), implementing very stringent rules for the digital platforms' compliance, including a penalty of up to 1% of global annual turnover in case of a breach.[37] Many commentators argue that the legislation has done more harm than good, unintentionally denying publishers their customary revenues, instead of strengthening their hand vis-à-vis the global platforms, as originally intended.

Commercial media, however, are not the only ones under economic pressures. The public service Czech Radio announced 60 redundancies in 2022, with another wave planned for 2023. Czech Television revealed its plan to sack 250 employees by 2024, together with other cost-saving measures, including a halt on investment. Both broadcasters have blamed these moves on the unsustainable financial situation caused by the continuing freeze on the licence fee, which has not been increased since 2008 (for Czech Television) and 2005 (for Czech Radio). Promises from the centre-right government elected in late 2021 to safeguard the financial sustainability of public service media have not been realised. Similarly, planned reforms to reinforce independence of the regulatory bodies – the media councils – by reforming the appointments system have stalled, faced with obstruction by the parliamentary opposition. Both the continuing uncertainty regarding the licence fee and the protracted impasse concerning the system of media councils means PSBs remain exposed to potential political pressure.

There were renewed policy initiatives in 2022 to strengthen protection against disinformation, particularly in the wake of the Russian invasion of Ukraine. The Czech Republic was one of the few EU countries to end broadcasts by the Russian propaganda channels Sputnik and RT and temporarily block several prominent domestic disinformation and conspiracy websites. The perceived arbitrariness of this action by the Czech association of internet service providers, following a request by the army, highlighted the need for a legal framework backing the fight against disinformation. However, the proposed law has been repeatedly delayed, raising concerns about the government's commitment to this cause. Concerns increased in late 2022 when the draft action plan to combat disinformation was leaked, including proposals for the centralisation of state advertising and systematic financial support for independent media. The draft plan attracted vigorous criticism from the Union of Publishers. The government responded in February 2023 by suddenly abolishing the post of the Media and Disinformation Commissioner (established only a year previously),[38] thereby effectively ending the preparations of the action plan and leaving the future of state policies for countering disinformation in doubt.

Václav Štětka
Loughborough University, UK

[36] https://www.e15.cz/byznys/media-prechod-do-digitalu-nezvladla-krize-jim-zasadi-smrtelnou-ranu-1395646
[37] https://www.kuceralegal.cz/amendment-to-the-copyright-act-publishers-versus-platforms-will-the-media-get-any-money/
[38] https://english.rozanek.cz/czech-government-media-commissioner-michal-klima-removed/

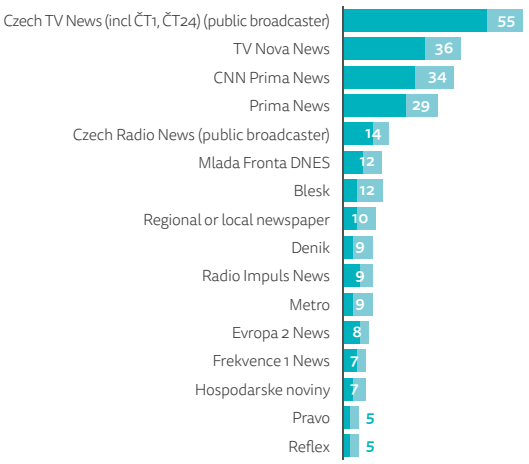
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

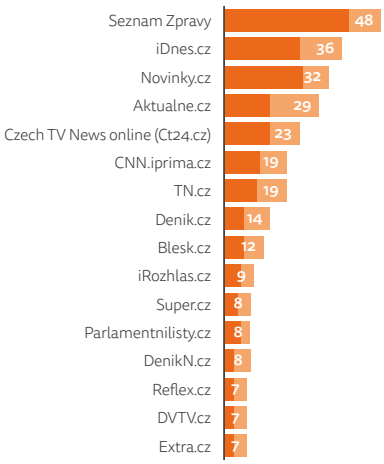
% Weekly usage

- 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



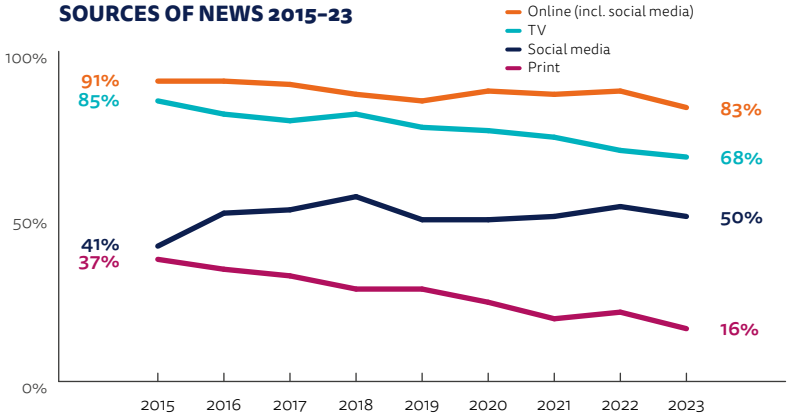
CHANGING MEDIA

The percentage of people getting their news from print is now the lowest since the survey began, down by over half since 2015. Local web portal Seznam has a dominant position online, running dozens of web services including the leading news site.

14% PAY

pay for **ONLINE NEWS**

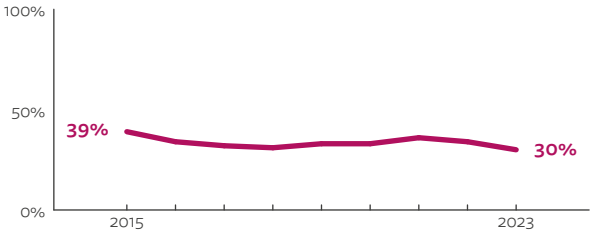
SOURCES OF NEWS 2015-23



TRUST

Overall trust has reached a record low, possibly because of the cost-of-living crisis and the war in Ukraine, but potentially also reflecting the presidential election campaign in January 2023, which was marked by polarisation and spreading of disinformation. Trust in specific news brands has remained largely the same, with public service media retaining their lead.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

30%
OVERALL TRUST
=38/46 markets

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2023** Score: **83.58** **14**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Aktualne.cz	51%	29%	19%
Blesk	16%	22%	62%
CNN Prima News	52%	25%	23%
Czech Radio News (public broadcaster)	59%	25%	16%
Czech TV News (public broadcaster)	57%	19%	23%
Deník	48%	33%	19%
Frekvence 1	46%	34%	20%
Hospodářské noviny	55%	29%	17%
Lidové noviny	45%	34%	21%
Mlada Fronta DNES	44%	31%	26%
Novinky.cz	48%	29%	23%
Právo	41%	34%	24%
Radio Impuls	45%	35%	21%
Seznam Zpravy	54%	25%	21%
TV Nova	40%	27%	32%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

31%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	45%	(-)	73%
2	YouTube	24%	(+1)	66%
3	WhatsApp	15%	(+1)	53%
4	Facebook Messenger	13%	(-)	48%
5	Instagram	12%	(+3)	34%
6	Twitter	7%	(-)	14%

Population	**5.8m**
Internet penetration	**98%**

DENMARK



The Danish media market has two strong public broadcasters (DR and TV2) and several successful commercial brands which receive an annual public subsidy. Commercial news organisations are facing increasing prices for newsprint, falls in print subscribers and advertising revenue, growing inflation, and new pay deals with journalist and other staff unions (March 2023) and have responded by cutting costs and laying off staff.

The gathering financial pressures on commercial media have taken their toll in the past year. The national tabloid paper *BT*, founded in 1916, closed its print version in January 2023. This reflected increased newsprint costs and falling print revenues and followed an unsuccessful attempt at opening local online news services in four provincial cities, leading to the loss of 32 journalistic jobs. *BT*'s online business model combines advertising with data gathered from user registrations. The other leading tabloid, *Ekstra Bladet*, went through a major upheaval in 2022, replacing all the top editors. But with the closure of *BT*'s paper it has faced less competition in print and has seen its lead over BT online increase (from 4 to 6 percentage points), according to our survey respondents.

Most commercial news websites have paywalls with only limited content freely available and our survey respondents reported a relatively high rate of paying for news online (19%). Digital subscription prices for broadsheet sites were already quite high. However, increasing costs mean some news organisations are reluctantly increasing subscription rates by 5–10% in early 2023.

Observers were underwhelmed by the media policy deal agreed in May 2022 by the social-democratic government, accusing it of being pretty much business-as-usual and lacking in a vision to address the wider digital challenges. The most dramatic change was to the Danish subsidy system on which many titles depend for survival: in 2022 state subsidies totalled €54m awarded to 76 recipients. The new system will impose a ceiling on the amount received by the big conglomerates – which will hit JP/Politiken (*Jylands-Posten*, *Politiken*, *Ekstra Bladet*) and Berlingske (*Berlingske*, *Weekendavisen*, *BT*) hardest – alongside a commitment to increase subsidies to local and regional newspapers.

From the perspective of commercial operators, the proposed 6% levy on streaming services' annual turnover looks more positive but it is unclear how this will be implemented. The Alliance of Danish Press Organisations, which started collective negotiations with tech giants about payment for news content in 2021, has landed two deals, with Microsoft and the Upday news app.

The digital activities of publicly funded broadcaster DR are set for a radical turn following its new 2025 Strategy, which redirects significant funding from its flagship linear channel DR1 to the digital news platform dr.dk, the audio platform DR Lyd, and the cross-media youth platform DR Ung. Similarly, the commercial public service operator TV2 has closed its youth-targeted linear channel TV2 ZULU, in order to revamp its online offers to 20–30-year-olds under the Echo brand across platforms. The 24/7 news channel TV2 News will become the new hub for all TV2's news services across platforms.

Public broadcasters' digital developments have exacerbated tensions with commercial operators, and the Association of Danish Media has filed a complaint to the European Commission, accusing DR of unfair competition, because of its free offer of the dr.dk news service and the DR news app.

Streaming has already overtaken broadcast TV in terms of numbers watching. Danes subscribe on average to four streaming services. DR and TV2 are responding by investing in their own streaming services. It seems to be paying off. Netflix tops the list (58% say they have used it at least once in the last year), but DR.TV (52%) and TV2 Play (40%) are not far behind.

Facebook is losing ground. TikTok experienced a breakthrough during the general election campaign, when some politicians' memes and humorous campaign videos succeeded with teen audiences. TV2 Echo, *Ekstra Bladet*, and Zetland all publish news videos on TikTok.

It was a breakthrough year for podcasts in Denmark in 2022. Commercial operators are rushing to invest, with many (Bauer Media; regional publishing conglomerate JFM) expanding their podcast portfolios. TV2 has a daily news podcast and two weekly themed podcasts, and DR is increasing its already substantial offering in the hope of building greater listener loyalty. Our survey shows public broadcaster DR produced more than half (51%) of the news-related podcasts mentioned by respondents. It also produces the most successful news podcast, Genstart, a narrative-driven, single-subject deep dive modelled on The Daily from the *New York Times* (see more in Section 2.5: News Podcasts: Who is Listening and What Formats are Working?).

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

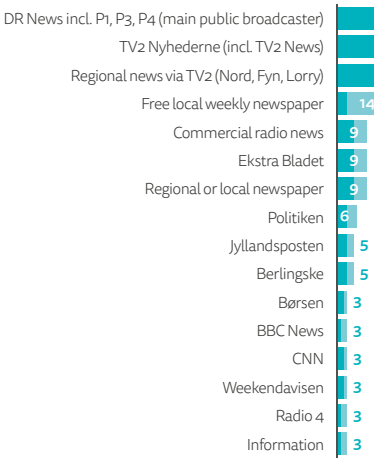
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

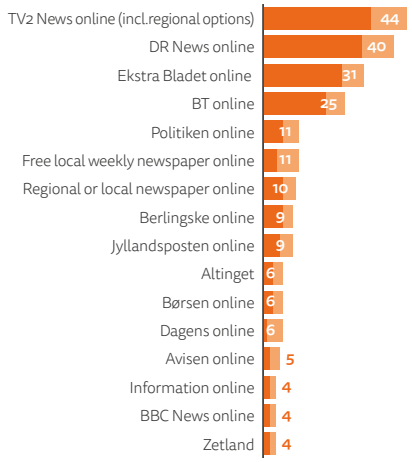
% Weekly usage

- 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



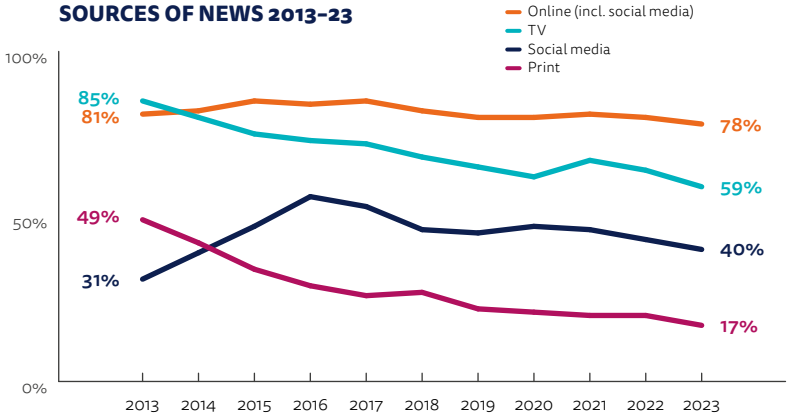
ONLINE



CHANGING MEDIA

Changes in news sources' offline and online reach are very small this year, although regional TV has dropped by 6pp, with the tabloid *Ekstra Bladet* gaining 3pp. TV and print sources, and news from social media, continue their slow decline.

SOURCES OF NEWS 2013-23



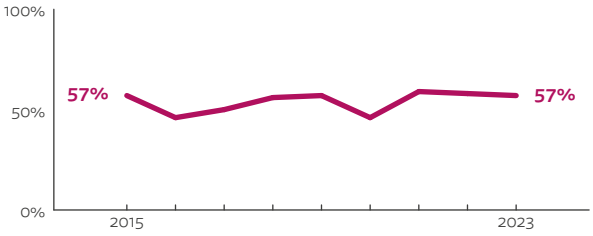
19% pay for **ONLINE NEWS**

34% listen to **PODCASTS** in the last month

TRUST

Trust in news media remains relatively high in Denmark at 57%. Brand trust scores remain at similar levels to previous years, with the exception of digital-born Zetland (+8pp), presumably due to increasing brand knowledge among news users. Public service news brands score high, while tabloids *BT* and *Ekstra Bladet* remain lower.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

57% **OVERALL TRUST =4/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **89.48** **3**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Altinget.dk	57%	30%	13%
Avisen	45%	37%	18%
Berlingske	68%	23%	9%
Børsen	72%	21%	7%
BT	43%	26%	31%
Dagens.dk	36%	35%	28%
DR News (main public broadcaster)	83%	12%	6%
Ekstra Bladet	36%	24%	40%
Information	66%	24%	10%
Jyllands Posten	70%	21%	9%
Kristeligt Dagblad	58%	29%	13%
Politiken	69%	22%	9%
Regional or local newspaper	69%	24%	7%
TV2 Nyhederne (incl. TV2 News)	79%	13%	7%
Zetland	58%	29%	13%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

15% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	31%	(-4)	71%
2	Facebook Messenger	8%	(-)	56%
3	Instagram	7%	(-)	42%
4	YouTube	7%	(-)	47%
5	LinkedIn	5%	(+1)	23%
6	Twitter	5%	(+1)	11%

Population	**5.6m**
Internet penetration	**94%**

FINLAND



Finland's news media environment features a strong regional press, a strong PSB (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 (21%) of paying for online news and Finnish news remains the most highly trusted among the countries surveyed.

Finnish news media's recovery from the hit caused by Coronavirus looked less assured in the second half of 2022 as energy and paper costs increased and accelerating inflation hit spending. Newspaper advertising (print and online, free city papers included) decreased 3.3% from 2021 to 2022 after an increase of 8.6% from 2020 to 2021 and a COVID-linked decline of 21% from 2019 to 2020.

The economic uncertainty has some of its roots in the war of Ukraine, which stayed in the headlines, along with the process of Finland and Sweden joining NATO. Some Finnish news media had their own reporters on site and used Ukrainian correspondents to describe people's everyday life and attitudes under the war. *Helsingin Sanomat* also regularly publishes reports by Meduza, an independent Latvian-based news service specialising in Russia.

One of the smaller TV news channels, AlfaTV, that had been strengthening its audience position in the last few years, was also very active in reporting on the Ukraine war, with plenty of on-site reporting. However, its parent company went bankrupt and closed the channel at the end of November 2022. Even though AlfaTV had less than 2% share of television viewing,[39] its volume of current affairs programmes was comparable to that of Yle. AlfaTV had secured additional investment in 2021 but didn't win enough advertising revenue to survive. The channel had a rather conservative slant and had sought to broaden the range of perspectives on Finnish TV.

Yle, for its part, was obliged to limit its online news in text after a change in the law came into force in August 2022. The origins of this lie in the Finnish Media 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. It seems though that the restrictions have not had much impact on Yle's online offering. The change in regulation may turn out to be just another incentive for increasing and developing audiovisual content online, which Yle and its commercial competitors might have done anyway.

Yle also faced new threats when the then main opposition parties (National Coalition Party and Finns Party) proposed cuts of roughly a quarter in Yle's funding. Both parties emerged in the lead in April 2023 elections and may become members of the next government. Yle's half-billion-euro budget is funded mainly by annual Yle-tax of up to €163 collected from Finnish taxpayers. In our Digital News Report survey, 71% of Finnish respondents said that publicly funded news services, such as Yle news, are important to them personally and 79% said they are important to society. These figures are high compared with those of other countries. The proposed cuts may reflect increased criticism by private media companies who blame the PSB for unfair competition in the digital world, combined with a more politically driven right-wing criticism targeted at Yle's news.

Government plans for a long-term direct subsidy mechanism for news media have not proceeded. The current system still depends almost solely on the indirect subsidy provided by a reduced 10% VAT rate for newspapers, books, and magazines, both online and print. However, in 2023 there will also be a one-off direct subsidy of €7m for journalists' salaries. The aims are to prevent so-called local news deserts, support the plurality of news content, and promote informed public debate. The industry welcomed these aims even though it would have preferred a more comprehensive, generous, and long-term media policy programme.[40]

In January 2023, two *Helsingin Sanomat* journalists were sentenced for a 2017 article which revealed classified information about a Finnish military signals facility, used to gather intelligence.[41] The court could have imposed a four-year prison sentence, but was more lenient, requiring the lead author to pay an income-related fine (less than one month's net earnings), with no action taken against the other journalist. The case generated debate about the limits on journalists' right to publish on issues related to national security and the verdict may be appealed.

Esa Reunanen
Tampere University, Finland

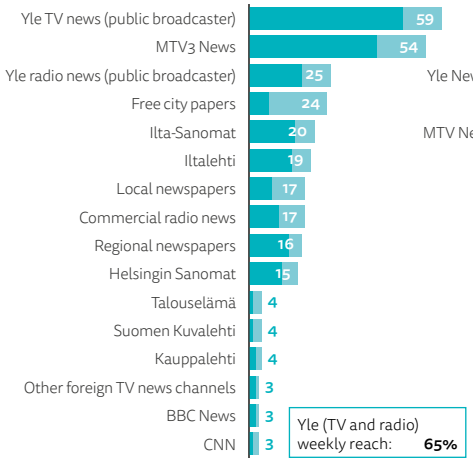
[39] Finnpanel. https://www.finnpanel.fi/en/tulokset/tv_reportlist.php
[40] The Finnish Media Federation. https://www.medialiitto.fi/uutiset/yksittaisen-mediatuen-sijaan-tarvitaan-laajempaa-mediapolitiikkaa/
[41] Yle News. https://yle.fi/a/74-20015097

WEEKLY REACH OFFLINE AND ONLINE

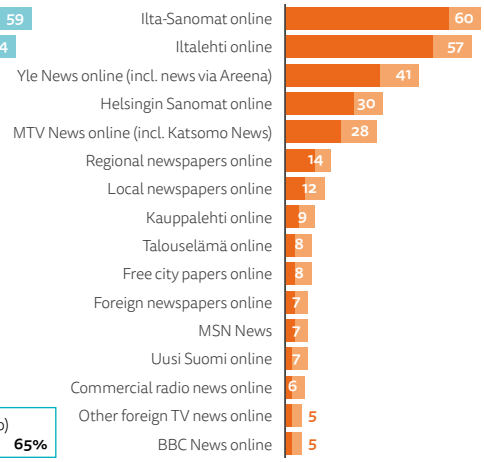
TOP BRANDS
% Weekly usage

- 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



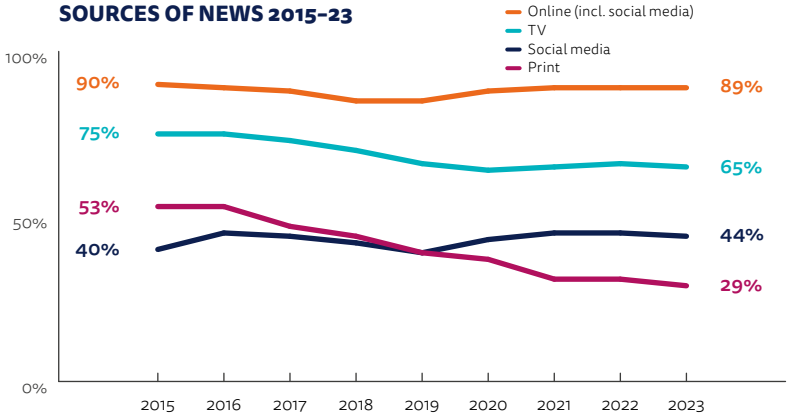
CHANGING MEDIA

The use of online news sources and television news remains largely unchanged. The printed press, however, continues its slow decline, with the exception of the evening tabloids, which increased their readership slightly this year.

21% pay for **ONLINE NEWS**

31% listen to **PODCASTS** in the last month

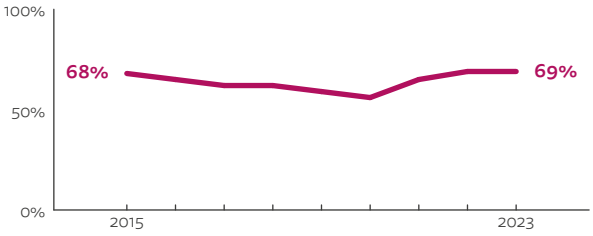
SOURCES OF NEWS 2015–23



TRUST

Contrasting with most other countries surveyed, Finland has maintained its trust levels after the COVID-19 bump, and brand-level trust shows a small increase for the television news channels and the evening tabloids. The Ukraine war and the process of Finland joining NATO may have increased the majority's trust in experts, institutions, and indeed the news media.

OVERALL TRUST SCORE 2015–23



Proportion that trusts 'most news most of the time'

69%
OVERALL TRUST
1/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 — Score: **87.94** — **5**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Commercial radio news	69%	19%	12%
Free city papers	60%	24%	16%
Helsingin Sanomat	81%	10%	9%
Hufvudstadsbladet	70%	21%	9%
Iltalehti	65%	15%	21%
Ilta-Sanomat	66%	15%	19%
Kauppalehti	80%	14%	7%
Local newspaper	81%	13%	7%
Maaseudun Tulevaisuus	72%	19%	9%
MTV News	81%	10%	9%
Regional newspaper	77%	16%	7%
Suomen Kuvalehti	78%	15%	8%
Talouselämä	79%	15%	6%
Uusi Suomi	63%	24%	14%
Yle News (public broadcaster)	87%	6%	8%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

30%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	32%	(+1)	69%
2	YouTube	15%	(+3)	65%
3	WhatsApp	15%	(+1)	73%
4	Instagram	10%	(+2)	50%
5	Twitter	8%	(+2)	17%
6	TikTok	5%	(+3)	20%

Population	**66m**
Internet penetration	**92%**

FRANCE



Widespread criticism, distrust, and avoidance – red flags are everywhere concerning the state of news in France. French media companies face a drastic drop in interest, along with one of the highest percentages of disconnection from news. However, some key existing players are reporting increased digital subscription numbers and new digital initiatives on investigative and environmental journalism are emerging.

This year, only 36% say they are very interested in news, compared with 59% in 2015. The same proportion (36%) say they sometimes and often 'actively' avoid the news. They have developed various strategies online, including ignoring or scrolling when they see news on screen (24%), and on mobiles they unsubscribe from notifications (13%). There are also selective avoiders who choose to avoid specific subjects: the war in Ukraine is the topic mentioned most often, with politics second, and COVID-19 third, revealing a new aversion to hard news. It's a dramatic change from last year when the Ukraine crisis sparked a renewed interest in news.

There's been no increase in the low level (11%) of paying for news in France. However, some brands' pay models are succeeding and our French survey respondents are unusual in paying for an average of two – rather than one – online news sources. *Le Monde* with its 547 journalists has the highest level of digital-only subscribers at almost 500,000 this year, an impressive increase of 25% on last year. *Le Figaro* with 500 journalists has 275,000 digital-only subscribers compared with 250,000 last year and the pure-player Mediapart, with its 73 journalists, reports 210,000 subscribers. Despite these success stories nearly half (47%) of French non-payers say nothing could encourage them to pay for news online, and 29% say they might reconsider if the cost was lower. In practice publishers are tending rather to increase prices to cover costs and emphasise the 'premium' nature of their content.

The proposed merger of the M6 and TF1 TV groups has been halted by the French competition authority on the ground that the merged group would be dominant within the TV advertising market. As a result, their attempt at creating a 'French Netflix' called Salto ended in March 2023.

Media policy has been quiet, in part because while President Macron was re-elected in 2022 he lost his parliamentary majority shortly afterwards and has since been engaged in an – at times bitter – fight to push through his pension reform. Nevertheless, his election promise to abolish the annual TV licence fee (€138) has been implemented and will be replaced by a direct government grant. The public broadcaster France TV is changing its line-up and from September will remove national TV news from its regional France 3 channels, in favour of more regionally managed news and features and more content online. By the Autumn the government is organising an event called the 'Estates General of the Right to Information' to address issues including press independence and news in the age of social media.

Social media remains one of the main access points to online news while direct access to news apps and websites is declining. In France, TikTok's use for news is growing (8%), with nearly twice that level (15%) for 18–24-year-olds. Among those producing social videos tailored for TikTok are individuals such as Hugo Décrypte (with his explainer videos), digital start-ups, and mainstream operators such as 20minutes, BFM TV, and even TF1.

All major media organisations have committed to a charter[42] to improve journalism in the face of the climate emergency. France TV now has a major TV environmental programme in prime time. There are also new digital-born initiatives focused on environmental journalism such as Vakita, which is also active on TikTok.

Another start-up focused on investigative journalism is L'Informé, which launched in October 2022. It employs 15 journalists, has 50,000 paid subscriptions, and is advertising-free, but also has some well-known investors, including Xavier Niel, owner of the telecoms company Free and a part owner of *Le Monde*.

Podcast use is stable, with 28% saying they had listened to a podcast in the last month – and of these almost half (45%) spent the same amount of time listening as last year. Hard news podcasts are less attractive than personal development and entertaining podcasts. However, Radio France is performing well, with a 30% increase in the past year in audiences on its own podcast platform, which it established to reduce dependence on third parties such as Spotify and Apple.

Alice Antheaume
Executive Dean, Sciences Po Journalism School

[42] https://chartejournalismeecologie.fr/upgrading-journalistic-practices-to-tackle-the-ecological-emergency-a-charter/

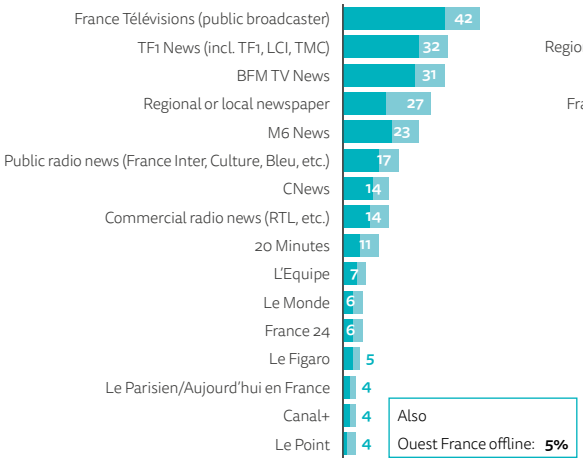
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

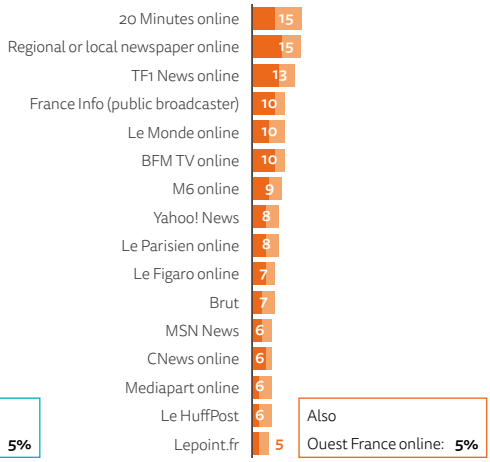
% Weekly usage

- **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



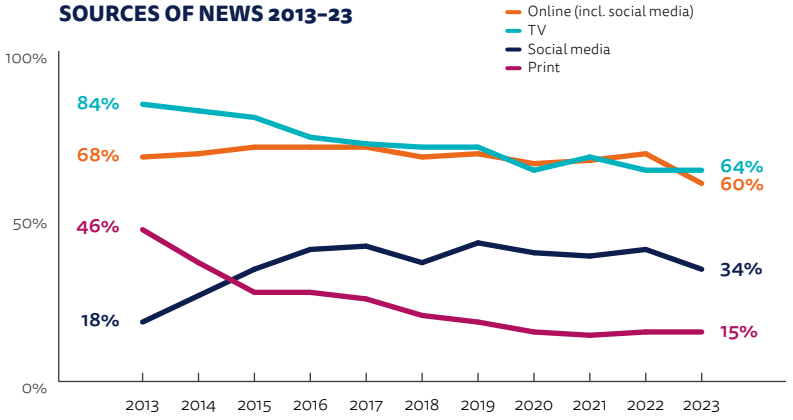
ONLINE



CHANGING MEDIA

TV and online remain the top two sources, with TV slightly ahead this year. Printed newspapers have been in long-term decline but have remained steady around 15% since 2020.

SOURCES OF NEWS 2013-23



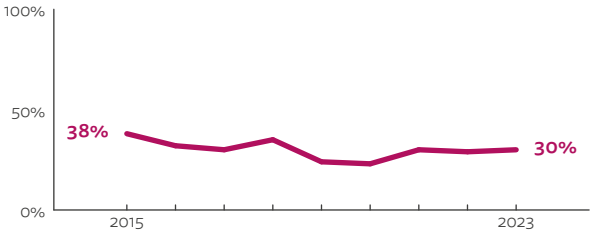
11% pay for **ONLINE NEWS**

28% listen to **PODCASTS** in the last month

TRUST

France still ranks low for overall trust in news by international standards at 30%. Most brands have increased their trust levels, with regional or local papers being most trusted, followed by public service brands and *Le Monde*, the leading quality newspaper brand. Commercial TV brands tend to have lower trust levels.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

30%
OVERALL TRUST
=38/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **78.72** **24**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
20 Minutes	44%	38%	18%
BFM TV news	40%	24%	36%
CNews	38%	30%	32%
France Bleu	48%	38%	14%
France Info	55%	29%	15%
France Inter	51%	33%	16%
France Télévisions News	57%	26%	17%
Le Figaro	42%	39%	18%
Le HuffPost	36%	42%	21%
Le Monde	52%	31%	17%
Le Parisien/Aujourd'hui en France	41%	42%	17%
M6 News	43%	37%	20%
Mediapart	44%	33%	23%
Regional or local newspaper	61%	28%	12%
TF1 News	46%	32%	22%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

27%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	36%	(-3)	59%
2	YouTube	23%	(-2)	51%
3	Instagram	16%	(+3)	34%
4	WhatsApp	15%	(+2)	41%
5	Facebook Messenger	14%	(-)	37%
6	Twitter	8%	(-1)	15%

Population	**84m**
Internet penetration	**94%**

GERMANY



Germany has seen interest in news, frequency of use, and trust all decline slightly in the past year. Commercial players are experiencing tough times with print sales falling, a major publisher being dismantled, titles being closed, and staff laid off. PSBs remain the most used news services, even after falls in reach this year, but they have been hit by a self-inflicted scandal which is prompting major changes to their future remit and organisation.

Commercial news providers have had a turbulent year. After RTL's purchase of the Hamburg-based magazine publisher Gruner + Jahr (from Bertelsmann) last year, RTL has closed multiple titles and laid off several hundred employees. Up to 700 jobs will be lost in Hamburg alone. A few famous titles, such as *Stern*, will be retained and the rest sold. Declining advertising revenues are cited as the main reason. The remaining titles are now to be increasingly focused on the digital business.

Axel Springer, the owners of Germany's most successful tabloid, *Bild*, has also announced plans to cut jobs while investing to become a purely digital media company. *Bild*'s move into TV has been scaled back and its main live bulletins *Bild Live* and *Bild am Abend* have been cancelled because of low ratings. In April 2023, Axel-Springer CEO Mathias Döpfner came under pressure as leaked messages contained controversial comments about East Germany and climate change, among other things, and seemed to be attempting to exert political influence over the editorial team.[43]

Sales of printed newspapers and magazines both fell in the fourth quarter of 2022. The German Audit Bureau of Circulation (IVW), blamed high inflation in part for the fall in paid circulation of daily newspapers, including Sundays, of 9.41% to an average of 12.3m copies daily in Q4 2022 compared with 13.54m a year earlier.

The fall affected quality papers and tabloids alike. Well-known titles such as the *Frankfurter Allgemeine Zeitung* (FAZ) and the *Süddeutsche Zeitung* (SZ) each saw total paid circulation decline by between 5 and 6% in Q4 2022 compared with the same period in 2021. Meanwhile tabloid *Bild*[44] also saw sales fall, by 7.63% in the same period to 1.099m. *Bild*'s digital subscriptions increased, but not by enough to compensate for falling print sales.

Of our survey respondents 11% pay for online news. Titles mentioned most frequently include *Bild*, *Der Spiegel*, *FAZ*, and *SZ*. In general, daily papers saw digital subscriptions grow by 5% but *FAZ* and *SZ*'s growth was rather slower (*FAZ* up from 59,170 to 62,478 and *SZ* up from 96,616 to 98, 817) and this also failed to compensate – either numerically or financially – for the decline in print. With weeklies things were brighter with an overall increase of nearly 50% in digital subscriptions; titles such as *Der Spiegel* and *Die Zeit* saw slower digital growth but nevertheless sufficient to drive overall increases in paid circulation.

The delivery of printed daily newspapers was partially discontinued for some brands on the grounds of cost, especially in rural areas. Under the coalition agreement between the governing parties, financial support for newspaper delivery was promised but has not yet happened.

In the dispute between Google and the collecting society Corint Media, representing about one-third of the German press, the official Arbitration Board has proposed that Google should provisionally pay €5.8m for the use of press content. The payment would be for the period from 7 June 2021 and is under consideration by Corint Media, which had originally demanded a payment of €420m from Google.

The debate about public service broadcasting in Germany has flared up again, prompted by a scandal in late 2022 at Rundfunk Berlin-Brandenburg (RBB), one of the stations that is part of the ARD network. The scandal involved accusations of nepotism, waste, and improper award of contracts against the former director of the RBB. RBB's director and chairman were both fired after a committee of inquiry and investigations by the Public Prosecutor's Office, but reforms have also been made to the supervisory committees of all PSBs. The affair has led to changes in the Interstate Treaty on Broadcasting, coming into force in 2025, including a tighter remit for German PSBs together with measures to increase transparency and oversight. This may affect numbers of PSB TV channels or what moves to the internet or is stopped altogether. A scandal at one ARD station is going to have far-reaching consequences for the shape of German PSBs over the coming years.

Sascha Hölig
Leibniz-Institute for Media Research | Hans Bredow Institute, Hamburg

[43] https://www.theguardian.com/world/2023/apr/13/axel-springer-ceo-mathias-dopfner-leaked-messages-reported
[44] *Bild*'s figures are reported together with Berlin's *B.Z.* paper.

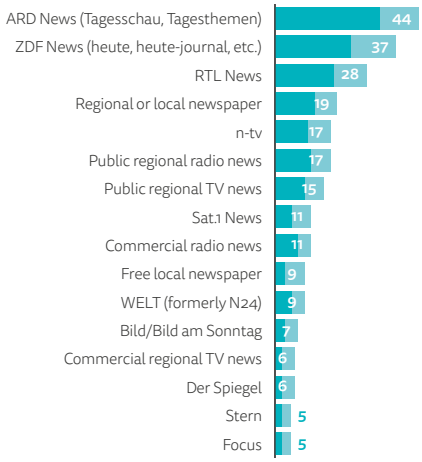
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

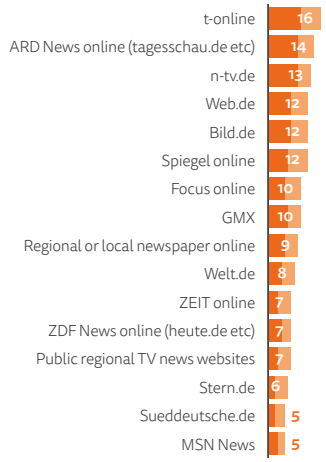
% Weekly usage

- 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



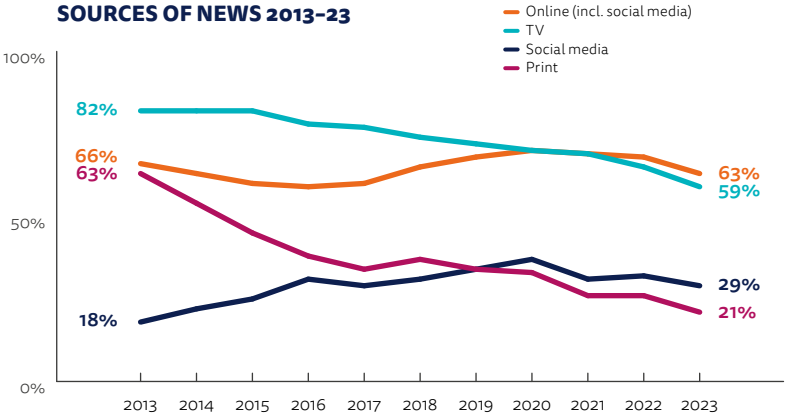
CHANGING MEDIA

Use of all sources declined. This may partially reflect increasing general news avoidance. However, the public broadcast channels ARD and ZDF have seen a greater decline in their weekly use for news than RTL, the leading commercial channel.

11% pay for **ONLINE NEWS**

28% listen to **PODCASTS** in the last month

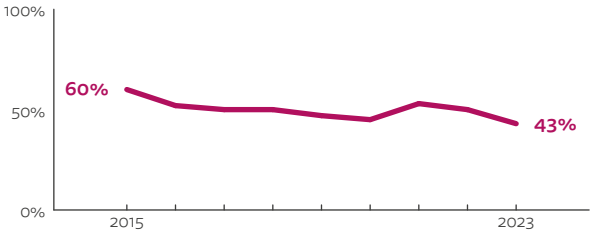
SOURCES OF NEWS 2013–23



TRUST

Trust in news overall has fallen to a level below that seen before the COVID bump. This is reflected in falling trust for almost every brand too. Scandals like those at public broadcaster RBB do not help improve the overall picture but the two main PSB news brands still have the highest level of trust and *Bild* the lowest.

OVERALL TRUST SCORE 2015–23



Proportion that trusts 'most news most of the time'

43% **OVERALL TRUST =14/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **81.91** **21**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
ARD Tagesschau	62%	19%	19%
Bild	22%	23%	54%
Der Spiegel	53%	27%	20%
Die ZEIT	54%	28%	18%
FAZ	52%	29%	19%
Focus	50%	29%	20%
n-tv	55%	27%	18%
Regional or local newspaper	59%	25%	16%
RTL aktuell	44%	28%	28%
Stern	49%	29%	23%
Süddeutsche Zeitung	54%	28%	18%
t-online	40%	36%	24%
web.de	34%	40%	26%
WELT	51%	29%	20%
ZDF heute	60%	21%	20%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

21% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	YouTube	16%	(+2)	47%
2	WhatsApp	14%	(-1)	62%
3	Facebook	14%	(-3)	36%
4	Instagram	8%	(-)	26%
5	Twitter	5%	(+1)	10%
6	Telegram	4%	(-)	10%

Population	10m
Internet penetration	79%

GREECE



Trust in news in Greece saw a large decline this year, partly due to perceptions of undue political and business influence on journalism. The media market in Greece is further characterised by digital fragmentation and high use of social media for news.

The past year has been characterised by heated discussions about press freedom and media pluralism in Greece among politicians and the public.[45] These are reflected in the large decline in the share of respondents who trust news (a decrease of 8 percentage points). Greece now has the lowest proportion (19%) of respondents trusting news in the 46-market sample.

The discussion surrounding press freedom intensified in May 2022, after the annual press freedom index by Reporters Without Borders (RSF) placed Greece in 108th position (down 38 positions from 2021), below many non-democratic countries. The opposition responded by accusing the government of restricting media freedom, citing the state-run news agency's failure to mention Greece's position in their article covering the RSF report. Meanwhile, the government criticised the report, with the Prime Minister publicly calling it 'crap', causing a fierce reaction from RSF.[46] When the Prime Minister was asked by Members of the European Parliament in Strasbourg to comment, he physically pointed to the front pages of anti-government newspapers as evidence that there was no shortage of media pluralism in Greece. The 2023 RSF report puts Greece in a similar position to last year (107th position).

The decision of a special court to convict the minister of digital policy, telecommunications, and media of the previous government for illegal interference in the TV licensing auction in 2016 – along with a businessman who participated in the process – exacerbated existing perceptions of undue political and business influence in Greek media.

In addition, the period following the deadly Tempi train crash in March 2023 (after our survey was completed) was also characterised by public outrage and rallies against the parties that had governed throughout the past decades. Vocal criticism was directed at some commercial broadcasters and famous TV journalists who were perceived to be biased in favour of the government when attributing responsibility for the train crash and for not previously sounding the alarm about railway safety.

The digital media market in Greece remains extremely fragmented, with our Greek survey respondents using a very large number of news sources per week, compared with other countries. The fragmentation of attention online is partly due to the large number of digital news media outlets operating, but also due to the high number of Greeks online using social media like Facebook for news, meaning news consumption is more casual and incidental. Other than Facebook, young Greeks are increasingly using Instagram and TikTok to get news updates from news organisations, or political influencers/activists. However, the fragmentation of the Greek news media ecosystem extends way beyond digital media. For instance, TV audiences are split between nine commercial and public national broadcasters, with the vast majority of news bulletins and programmes struggling to stand out in the Nielsen ratings. Similarly with print, despite the tiny market for print news, there are still at least 20 national daily newspapers and seven national sports newspapers in circulation; the majority of them have very small audiences and are loss-making.

The scoop of the year was the revelation that a large number of Greek prominent figures, including high-level politicians, investigative journalists, army leaders, and businesspeople, had their mobile phones monitored either by illegal surveillance software and/or by the National Intelligence Service.

The reporting that led to these revelations started from April 2022, led by journalists Eliza Triantafillou and Tassos Telloglou from the digital-born, subscription-based Inside Story.[47] Despite their multiple stories on the topic it took months before mainstream news media outlets in Greece followed up with their own reporting in July 2022, after a European Parliament investigation showed that the phone of the MEP and leader of the Greek socialist party had been hacked by the illegal surveillance software. The scandal led to the resignations of both the chief of the National Intelligence Service and the Prime Minister's general secretary on 5 August 2022, with the latter filing defamation claims for hundreds of thousands of euros against investigative journalists and media outlets. The government denies being behind the wiretapping.

One lesson from this incident is that, despite the structural weaknesses of Greek investigative reporting (lack of resources, lack of editorial freedom, partisan motives), consistent and thorough reporting by small niche outlets was effective in uncovering a major scandal with political repercussions.

Antonis Kalogeropoulos
Free University Brussels (VUB)

[45] This profile went to press before the Greek elections due in May 2023 and again in June 2023.
[46] https://rsf.org/en/world-press-freedom-index-greek-government-spokesman-responds-poor-ranking-counterfactual-claims
[47] https://insidestory.gr/article/who-was-tracking-mobile-phone-journalist-thanasis-koukakis

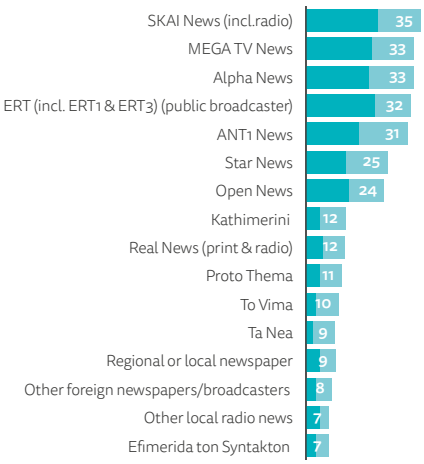
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

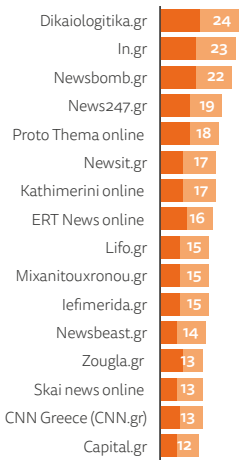
% Weekly usage

- 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



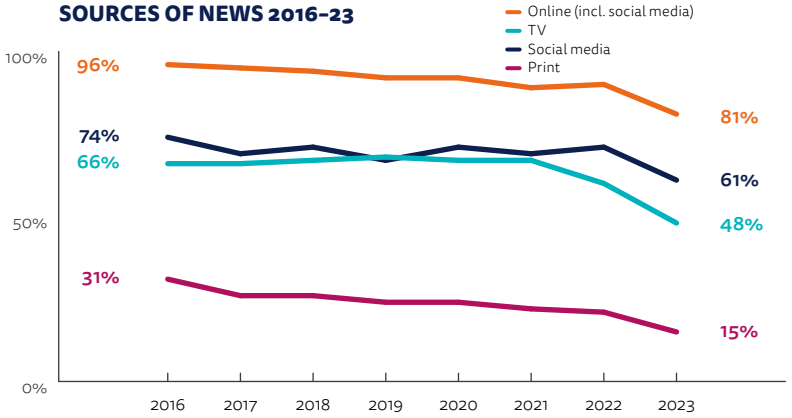
METHODOLOGY NOTE

We introduced education quotas for the first time in Greece as part of our efforts to make data as representative as possible of national populations. As a result, 2023 data will be more accurate but not always directly comparable with previous years.

10% PAY

pay for
ONLINE NEWS

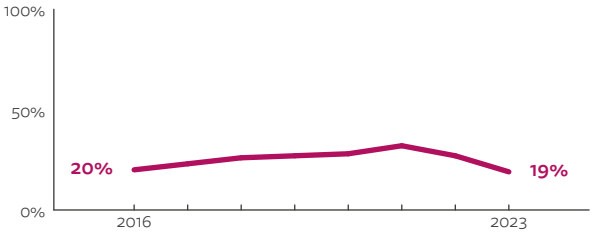
SOURCES OF NEWS 2016–23



TRUST

Trust in news fell by 8pp, partly due to heated debate about political and business influence on news media. This fall was largely reflected at the brand level, although trust in public broadcaster ERT increased by 3pp this year. Generally local news outlets have high trust, while partisan commercial national broadcasters and tabloid newspapers or tabloid-style digital-born news websites are least trusted.

OVERALL TRUST SCORE 2016–23



Proportion that trusts 'most news most of the time'

19%
OVERALL TRUST
46/46 markets

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2023** Score: **55.2** **107**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Alpha News	42%	30%	28%
Ant1 News	41%	29%	30%
Dikaiologitika.gr	50%	30%	20%
Efimerida ton Syntakton	43%	29%	28%
ERT News (public broadcaster)	49%	25%	25%
in.gr	43%	31%	26%
Kathimerini	47%	29%	24%
MEGA	40%	29%	31%
news247.gr	42%	35%	23%
Newsbomb.gr	37%	32%	31%
Proto Thema	40%	30%	30%
Real News	41%	30%	28%
Regional or local newspaper	51%	31%	19%
SKAI News	36%	22%	42%
Ta Nea	41%	32%	26%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

34% SHARE

SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	46%	(-7)	70%
2	YouTube	30%	(-6)	67%
3	Viber	20%	(-4)	60%
4	Facebook Messenger	19%	(-4)	55%
5	Instagram	18%	(-3)	51%
6	Twitter	10%	(-5)	19%

Population	**9.6m**
Internet penetration	**89%**

HUNGARY



Following the landslide victory of the ruling Fidesz party in April 2022, leading to a fourth consecutive term for Viktor Orbán as Prime Minister, many media outlets have started downsizing, with some major titles ceasing print publication.

In the Hungarian media market 2022 was a turbulent year. With runaway inflation, cost-cutting measures were introduced by many media companies. Following the elections, pro-government media conglomerate KESMA, the owner of over 400 titles, closed some of its smaller publications, downsized staffing at several others, and ended the print publication of major titles including long-running finance daily *Világgazdaság*, the weekly *Figyelő*, launched in 1958, and 'patriotic tabloid' *Ripost*. It sold 'Viktor Orbán's favourite newspaper', sports daily *Nemzeti Sport*, to the state and in early 2023 merged its opinion portal 888.hu with Origo.hu. Pro-government broadsheet *Magyar Hírlap*, published since 1968, went online only, while government-friendly television channel Pesti TV folded. Several media outlets not clearly aligned with the government have also cut costs. Weekly *168 Óra* and free *Pesti Hírlap* ceased print publication, and news portal Azonnali.hu, owned by an opposition MP, closed. On the plus side, RTL and TV2 both launched new online streaming platforms, RTL+ and TV2 Play Premium, respectively, with exclusive content for subscribers.

The closure of media outlets just after the elections suggests a view of the media as a political instrument. It also signals a shift towards social media, used by 61% in Hungary, in Fidesz's media strategy. Megafon Centre, a conservative social media incubator that trains pro-government influencers and promotes their posts, has been pushing the government's narratives to Hungarian Facebook users' feeds. Megafon was also one of the biggest spenders on political ads on Facebook in the election campaign,[48] urging citizens to vote for Fidesz. It claims to be funded by private donors.

Yet traditional media are also seen as playing an important role in the 2022 Fidesz election victory. The OSCE's Office for Democratic Institutions and Human Rights election monitoring mission reported that 'the pervasive bias in the news and current-affairs programs of the majority of broadcasters monitored … combined with extensive government advertising campaigns provided the ruling party with an undue advantage.'[49]

State advertising continues to distort the media market, channelling public funds to pro-government media and starving independent outlets of advertising revenue. Four independent weeklies are planning to sue the government over discriminatory ad purchasing.

In July the European Commission took the government to court over the Media Council's 2021 decision to force one of the last independent radio stations, Klubrádió, off the air. Hungary's oldest community radio Tilos Rádió nearly faced the same fate when the authority refused to renew its licence. After a three-week hiatus, Tilos Rádió was back on air in September. The Commission also referred Hungary to court over the 2021 law that bans content 'promoting' homosexuality to minors.

Media ownership and funding were dominant topics in public debate. Following revelations that the opposition parties may have received campaign funds from abroad, government politicians, the pro-government media, and influencers launched smear campaigns against independent media outlets that have received foreign funding. These media outlets, including Telex and Átlátszó, are labelled 'dollar media' and are accused of serving 'foreign interests'.

Reporting on Russia's war in Ukraine has been controversial, with many seeing Hungary as 'the EU capital of Russian disinformation'.[50] Although the media authority found that major television channels reported on the war objectively, the Hungarian Civil Liberties Union and think tank Political Capital filed a complaint with the European Commission, claiming that the public media kept citing Russian propaganda channels RT and Sputnik even after they were banned in the EU.

With public discussions of the 'dollar media' and Russian disinformation, it is not surprising that trust in news has decreased to just 25%. Hungary now ranks 45th out of the 46 countries in the *Digital News Report*. Not only has trust decreased, but a drop was registered in most media outlets' reach (though some of it may be related to a change in survey methodology). Once-independent, now pro-government Index.hu and independent 24.hu remain the top online news sources, now followed by pro-government Origo.hu. In its second full year of operation, independent Telex is the fourth most often used online news source. For offline, independent RTL's reach fell but it remains the most frequently used news source (41%), with TV2 trailing far behind (27%).

Judit Szakács and **Éva Bognár**
Central European University

[48] https://telex.hu/belfold/2022/04/08/kampany-a-facebookon-50-nap-3-milliard-forint
[49] https://www.osce.org/files/f/documents/2/6/523568.pdf
[50] https://www.politico.eu/article/russia-war-narrative-hungary-disinformation/

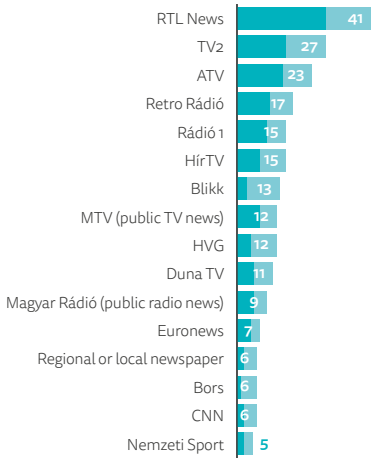
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

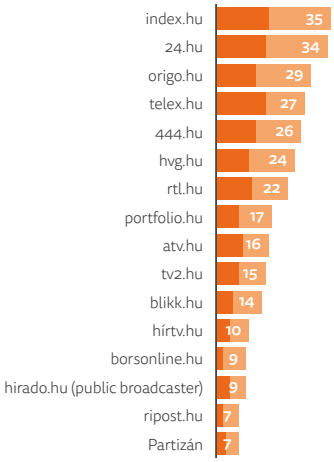
% Weekly usage

- 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

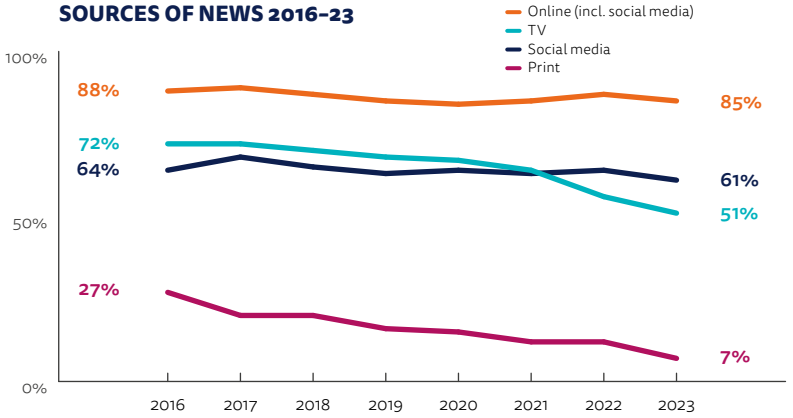


METHODOLOGY NOTE

We introduced education quotas for the first time in Hungary as part of our efforts to make data as representative as possible of national populations. As a result, 2023 data will be more accurate but not always directly comparable with previous years.

9% pay for **ONLINE NEWS**

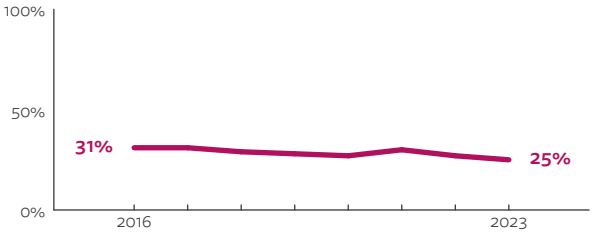
SOURCES OF NEWS 2016–23



TRUST

Overall trust in news is very low. Right-wing respondents tend to trust the news more than those on the left (36% and 28%, respectively). The independent outlets HVG and RTL remain most trusted, and distrust at the brand level is quite high. Almost half the respondents said they did not trust the PSB MTV.

OVERALL TRUST SCORE 2016–23



Proportion that trusts 'most news most of the time'

25% **OVERALL TRUST 45/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **62.96** **72**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
24.hu	42%	33%	26%
444.hu	38%	30%	32%
ATV	43%	28%	29%
Blikk	20%	29%	51%
HírTV	32%	26%	42%
HVG	51%	27%	22%
Index.hu	38%	31%	31%
Magyar Nemzet	30%	33%	37%
MTV (public television)	29%	22%	49%
Népszava	32%	34%	34%
Origo.hu	32%	28%	40%
Regional or local newspaper	34%	33%	33%
RTL	50%	24%	26%
telex.hu	44%	31%	25%
TV2	29%	22%	49%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

32% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	53%	(-7)	76%
2	YouTube	28%	(+1)	72%
3	Facebook Messenger	12%	(-2)	65%
4	TikTok	9%	(+4)	28%
5	Instagram	7%	(-1)	34%
6	Twitter	5%	(+2)	12%

Population	5m
Internet penetration	92%

IRELAND



The Irish media landscape is somewhat nervous in 2023: in particular, global job losses at tech companies have major implications for Ireland as Dublin is the European headquarters of many of them, including Meta, Twitter, and Microsoft. The high cost of print, allied with the general cost-of-living crisis is also testing the sustainability of print production.

The *Future of Media Commission Report* was finally published in July 2022 after a long delay during which the government deliberated about whether to implement its main recommendation to replace the RTÉ licence fee with direct state funding. In the end the government decided to retain the current RTÉ funding system but subject it to ongoing review.

Meanwhile the commission, which was set up to find ways of boosting the media industry in straitened times, had all its other 49 recommendations accepted by the government. The industry overall, which serves a vital public service of providing information trusted by many – as witnessed during the COVID-19 crisis – faces multiple problems: the rising cost of living and the ever-increasing competition for ad-spend by companies such as Google, Facebook, and TikTok.

One major recommendation, which came into being in January 2023, was the immediate reduction of VAT on newspapers – both in print and online – from 9% to 0%. This was designed to help traditional media transition to digital content, especially at a time of ballooning newsprint costs. It is hoped this financial advantage won't just be passed on to shareholders but will improve digital content and newsgathering and help preserve or grow journalism jobs. In October Peter Vandermeersch, chief executive of Mediahuis Ireland, publisher of titles including *The Independent*, told the Business Post, 'Somewhere in the future, there won't be print editions during the week'.[51]

Pundits and reporters were generally happy with the report's recommendations, in particular with plans for a new Media Fund to foster public service journalism. The fund's first action was to announce a focus on investing in local democracy and court reporting. The resources given to improved and wider court reporting were particularly welcome, and schemes will be rolled out across 2023.

Despite this good news for journalism, the economic downturn has seen a number of job losses across the sector. In August there were redundancies at *Times Ireland* and the Irish section of the *Sunday Times*.[52] This led to the termination of the *Times Ireland* digital weekday editions; digital-first stories are now published ahead of the *Sunday Times* newspaper. The *Irish Mirror* and the *Irish Daily Star*, two titles owned by UK company Reach, announced job cuts in January due to falls in advertising and digital revenues. In March, Mediahuis also announced an 'extensive' round of job cuts.

It is not just the traditional media facing layoffs: significant job cuts were also announced across the year by multinational tech firms, including Meta (Facebook), Alphabet (Google), Twitter, Amazon, HubSpot, Stripe, Dell, and Microsoft. According to the Central Bank, so far 2,300 people have lost jobs in Ireland, but this is expected to rise. The *Irish Times*[53] commented that, if this is largely a readjustment following growth during COVID, 'then the sector may return to growth before too long'.

In March a new Media Commission was established, Coimisiún na Meán, which replaces the former Broadcasting Authority of Ireland. Among other things, this new body will regulate broadcasting and audiovisual online safety content under relevant EU directives. It will also impose a levy on providers of audiovisual media services to fund production of European media. Another scheme will provide funds to community broadcasting to support good journalistic practice.

This year's survey data suggest a slight tightening of belts in terms of payment for online news media in Ireland, down 1 percentage point from last year to 15% of those surveyed. The top titles named by our respondents were the *Irish Times*, the *Irish Independent*, the *Guardian*, and the *New York Times*. The percentage who say they listen to podcasts is down 2pp at 44% but similarly two of the most cited podcasts are from publishers based abroad, reflecting the permeability of the Irish market (see Section 2.5: News Podcasts: Who is Listening and What Formats are Working?).

Professor Colleen Murrell
Dublin City University

[51] Emmet Ryan, 'Mediahuis Chief: The Money we Get from the Vat Reduction will Go into Developing New Platforms', Business Post, 1 Oct. 2022. https://www.businesspost.ie/post-plus/mediahuis-chief-the-money-we-get-from-the-vat-reduction-will-go-into-developing-new-platforms/
[52] Donal MacNamee, 'Staff at Sunday Times and Times Ireland Offered Voluntary Redundancy in Overhaul', Business Post, 29 June 2022. https://www.businesspost.ie/news/staff-at-sunday-times-and-times-ireland-offered-voluntary-redundancy-in-overhaul/
[53] Editorial, 'The Irish Times View on Job Losses in Tech: A Warning Signal', *Irish Times*, 23 Jan. 2023. https://www.irishtimes.com/opinion/editorials/2023/01/23/the-irish-times-view-on-job-losses-in-tech-a-warning-signal

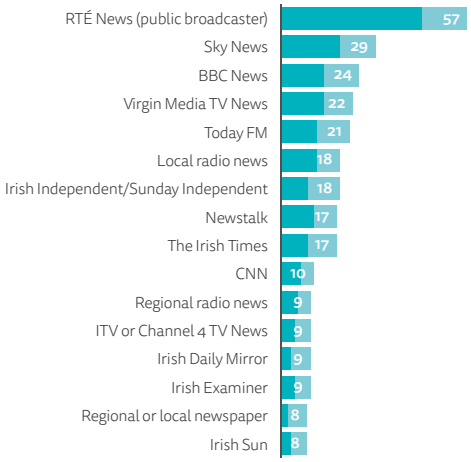
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

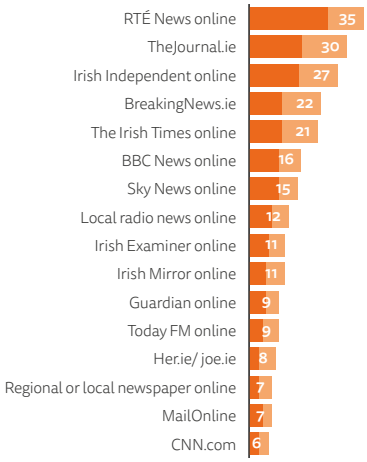
% Weekly usage

- 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



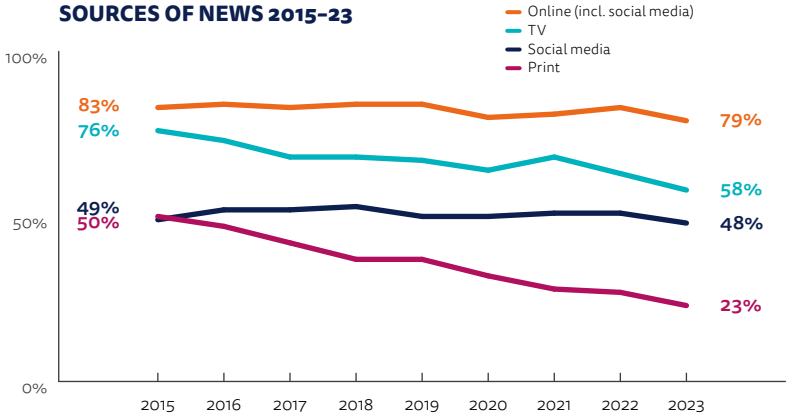
ONLINE



CHANGING MEDIA

The decline of TV and print as news sources has accelerated over the past eight years, while online has remained steady with no signs of it making up the gap.

SOURCES OF NEWS 2015–23



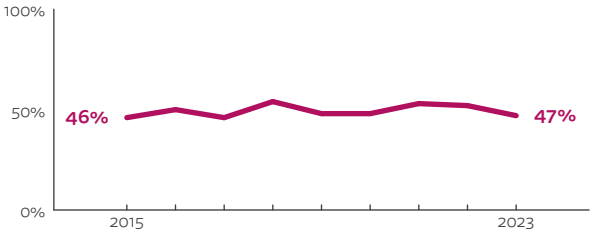
15% pay for **ONLINE NEWS**

44% listen to **PODCASTS** in the last month

TRUST

Trust in news in general remains relatively high in Ireland and the 5pp fall to 47% from 52% last year seems to reflect a return to the levels seen in 2017 and 2019 pre-COVID. At the brand level many scores have declined slightly but RTÉ remains the most trusted brand, closely followed by local or regional radio and the *Irish Times*.

OVERALL TRUST SCORE 2015–23



Proportion that trusts 'most news most of the time'

47%
OVERALL TRUST
11/46 markets

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2023** Score: **89.91** **2**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
BBC News	68%	17%	15%
Breakingnews.ie	55%	28%	17%
Irish Daily Mail	42%	25%	33%
Irish Daily Mirror	40%	26%	34%
Irish Examiner	63%	23%	14%
Irish Independent	67%	20%	13%
Newstalk	64%	22%	14%
Regional/local newspaper	68%	21%	11%
Regional/local radio	70%	20%	10%
RTÉ News	71%	15%	14%
Sky News	65%	18%	16%
The Irish Times	70%	18%	12%
TheJournal.ie	58%	26%	16%
Today FM	64%	24%	12%
Virgin Media News	64%	22%	14%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

29%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	30%	(-3)	61%
2	WhatsApp	21%	(-1)	72%
3	YouTube	19%	(-1)	59%
4	Twitter	15%	(+1)	26%
5	Instagram	15%	(+1)	43%
6	TikTok	9%	(+4)	24%

Population	**60m**
Internet penetration	**91%**

ITALY



The Italian media system is being rocked by successive waves of digital transformation. Publishers are selling traditional outlets and acquiring digital companies focused on social media to target young audiences. Digital advertising overtook traditional offline advertising but is challenging, and the percentage paying for online news remains low, so legacy media brands are restructuring their newsrooms.

Major Italian publishing groups are continuing to offload some of their traditional news outlets to smaller publishers. Following on from its previous sales of major magazines such as *Panorama* and *Donna Moderna*, the Mondadori Group, owned by Silvio Berlusconi's family, is now selling its main newspaper, *Il Giornale*, to the Angelucci group, which already owns other centre-right outlets such as *Libero* and *Il Tempo*. A new strategic focus on young audiences is clear from Mondadori's December 2022 purchase of Webboh, an online outlet specialised in gossip and insights on the world of social media content creators.

In 2022 the GEDI group, which publishes major newspapers such as *La Repubblica* and *La Stampa*, sold the renowned investigative magazine *L'Espresso* and several local newspapers. In February 2023, faced with the possibility of further sales of local newspapers, journalists at *La Repubblica* went on strike. This followed resignations by several journalists in protest at the new editorial line of the newspaper, which they say changed with GEDI's new owners – whom they blamed for softening the paper's traditional centre-left stance to broaden its appeal. Meanwhile GEDI also prioritised social media content distribution and monetisation, with its July 2022 purchase of 30% of Stardust, an innovative and fast-growing influencer-focused marketing company.

Takeovers are not limited to traditional publishers. In 2022 the recently established podcast company Chora Media bought the digital-born outlet Will Media. While both players mainly distribute their content on third-party platforms such as Spotify (for Chora Media's podcasts) and Instagram (for Will's videos), the newly acquired outlet contributes with its popularity among young audiences. Our data show that Will Media's general online reach is still quite limited (2%), but it does much better among 18–24-year-olds (8%).

Online advertising revenues overtook TV advertising revenues for the first time in 2019, and by 2021 accounted for over half (54%) of overall advertising revenues.[54] There has been a clear trend towards implementing paywall solutions since 2017 but the percentage of our survey respondents paying for online news today – at 12% – is the same as it was five years ago. *Il Corriere della Sera*, the first among the top Italian newspapers to introduce pay solutions, has recently celebrated reaching 508,000 digital subscribers.

Most Italian news organisations still mainly rely on online advertising to fund digital operations. However, publishers' share of online advertising revenues is limited, with platforms such as Google and Facebook/Meta taking the lion's share (85% in 2021).[55] This is particularly worrying as traditional advertising revenues shrink. From 2017 to 2021, the overall revenues in the television and print sectors decreased by 10%, and this led to a reduction of 2,400 employees (-17%) just in the newspaper and magazine industry.[56]

The online reach of Italian news brands is relatively unchanged. The websites with the widest reach are those of the main commercial TV broadcasters (Mediaset's TgCom24 and SkyTg24), the Italian PSB RAI (Rainews.it), the Italian news agency ANSA, and the leading newspapers (*La Repubblica*, *Il Corriere della Sera*, and *Il Fatto Quotidiano*). The digital-born outlet Fanpage, which has a strong social media presence, retains its position among the top Italian news outlets. Il Post is another digital-born outlet achieving reasonable results (6%). These sites are particularly popular among young audiences, with Fanpage reaching 26% and Il Post reaching 13% of online under-35s.

In January 2022, HuffPost Italia introduced a freemium model with part of its content only accessible to paying users; this generated 5,000 subscribers in the first six months, but its online reach – which was 9% in our last 2022 survey – has fallen to 5%. *Il Corriere della Sera's* publisher (Cairo/RCS) reported that the group's digital revenues accounted for 25% of the total in 2022. *Il Corriere della Sera* has recently announced an editorial reorganisation to strengthen its digital operations. Along with a reduced number of pages in the print edition, these changes include an earlier start for the newsroom to ensure that online users can access a more complete and enhanced online news offer from early in the morning.

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Dublin City University

[54] https://www.agcom.it/relazioni-annuali
[55] https://www.agcom.it/relazioni-annuali
[56] https://www.agcom.it/focus

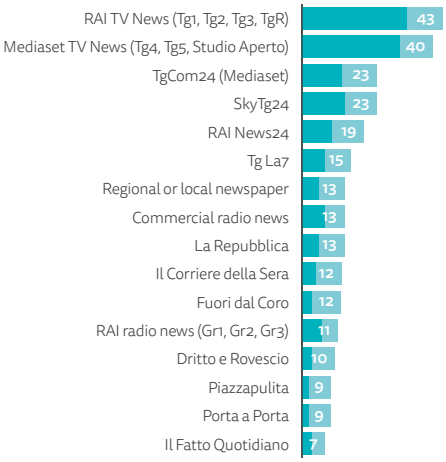
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

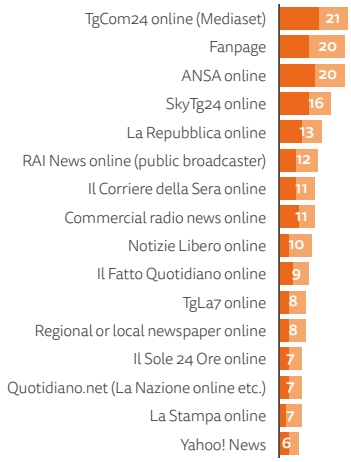
% Weekly usage

- 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



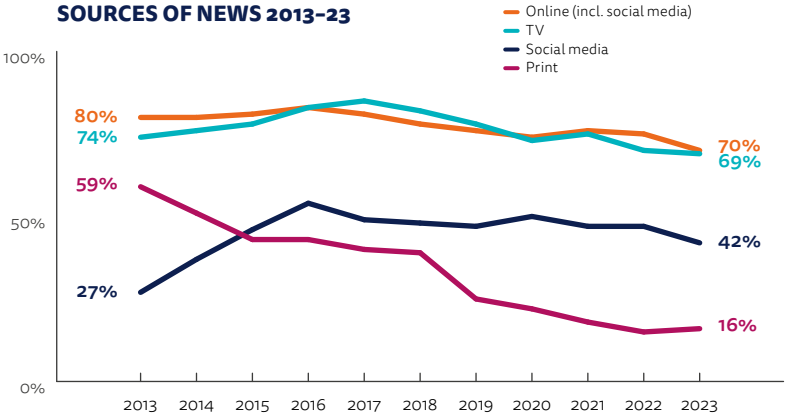
ONLINE



CHANGING MEDIA

Social media use for news has declined in recent years, but is still more than double that of print and, together with online, is slightly more used than television.

SOURCES OF NEWS 2013–23



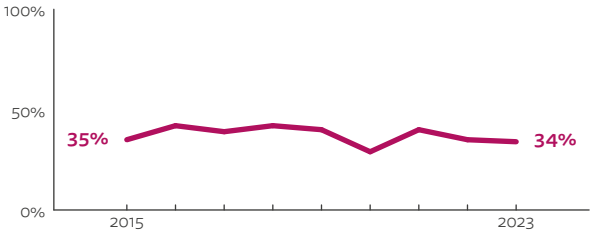
12% pay for **ONLINE NEWS**

30% listen to **PODCASTS** in the last month

TRUST

Overall news trust remains very low (34%) but there are relatively high levels of trust in some specific news brands, especially those known for lower levels of political partisanship. The least trusted outlets are those with a more pronounced political bias and also the digital-born outlet Fanpage.

OVERALL TRUST SCORE 2015–23



Proportion that trusts 'most news most of the time'

34% **OVERALL TRUST =31/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **72.05** **41**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
ANSA	78%	15%	7%
Fanpage	42%	31%	28%
Il Corriere della Sera	63%	24%	13%
Il Fatto Quotidiano	55%	27%	18%
Il Giornale	51%	27%	22%
Il Sole 24 Ore	69%	21%	10%
La Repubblica	59%	23%	18%
La Stampa	57%	26%	17%
Libero Quotidiano	47%	26%	27%
Mediaset News	58%	23%	20%
Porta a Porta	53%	24%	23%
RAI News (public broadcaster)	63%	19%	18%
Regional or local newspaper	66%	23%	11%
SkyTG24	71%	19%	9%
Tg La7	63%	22%	15%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

34% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	44%	(-1)	68%
2	WhatsApp	27%	(+1)	83%
3	Instagram	20%	(+2)	53%
4	YouTube	19%	(-2)	58%
5	Telegram	9%	(-)	29%
6	TikTok	8%	(+3)	23%

Population	17m
Internet penetration	95%

NETHERLANDS



A strong PSB and a high degree of media concentration continue to characterise the Dutch media landscape, but regulators have put a stop to further market consolidation. After previous reports of sexual misconduct at commercial broadcasters in 2022, a toxic workplace culture was also exposed within the PSB.

Alongside the popular public service news organisation NOS, the Belgian-owned commercial publishers DPG Media and Mediahuis continue to dominate both the offline and online news market. However, 2022 was the year when financial pressures seemed to accelerate the move to digital in the commercial sector. Both commercial publishers faced increasing delivery and production costs and increasing cancellations of print subscriptions, and the CEO of Mediahuis proclaimed that 'the end of the print newspaper is nearer than we thought'.[57] However, Mediahuis (+13%) and DPG Media (+14%) each reported a growth in digital subscribers in 2022. DPG Media (owner of *Algemeen Dagblad [AD]*, *De Volkskrant*, *Trouw*, *Het Parool*, and regional titles) removed its paywalls for subscribers to one of their titles, granting them digital access to the premium content across all their titles.

In a rare attempt at collaboration, the five major Dutch players (NPO, RTL, Talpa, DPG Media, Mediahuis) joined forces in a new initiative – Datakluis (Data Vault). Datakluis would create a new data infrastructure allowing Dutch users to store their personal digital data locally and control access. The companies hope this will reduce their dependence on Google and Meta and get a larger share of advertising revenues through increased personalisation. The plan is currently at the research stage and has applied for a €50m government grant. Commercial media companies also joined forces to negotiate with tech giants about compensation for usage of their news content.

In a break with the trend towards market consolidation, the Netherlands Competition Authority (ACM) blocked the acquisition of Talpa Network (which includes SBS TV) by RTL Nederland, who together dominate the commercial TV market. ACM argued that the merger would make RTL too powerful and able to set TV advertising prices.

Like other public broadcasters, NOS is working hard to attract and retain younger viewers and its brand NOS op 3 within NOS News is at the forefront of those efforts. Having succeeded in building audiences on Instagram, YouTube, and TikTok, NOS op 3 has now started to experiment with the livestream platform Twitch. In its weekly livestream, it summarises the week's news and holds a Q&A session with the audience.

Several media companies are launching podcasts as one way to appeal to younger audiences – most Dutch podcast listeners are under 35. Around a quarter (28%) of our sample say they have consumed a podcast in the last month.

Aspirant PSB Ongehoord Nederland (ON) (Unheard Netherlands) continues its controversy-riddled run. ON claims to give a voice to people who feel unrepresented by existing broadcasters and seeks to add a 'critical voice' on issues such as globalisation, immigration, and climate policy. The Dutch PSB system allows any player that differs from existing PSBs and gathers 50,000 paying members to become an aspirant broadcaster, with guaranteed public funding and airtime.

In the last year ON has been fined twice (€84,000 and €56,000) by NPO – the umbrella administrative body for all public broadcasting services in the Netherlands – for breaches of the journalistic code by spreading disinformation, or bringing the PSB into disrepute. In November 2022, the NPO Ombudsman determined ON was in breach for continuing to spread disinformation, thereby risking a third fine. While the Media Law provides for a license to be revoked after just two fines, that didn't happen; ON is still operating as of spring 2023. The Secretary of Culture and Media did install an Advisory Board on Public Service Broadcasting to advise her on admission and accountability criteria for public broadcasters.

The past year has also seen two high-profile scandals involving different forms of workplace bullying at the PSB. The first centred on a talkshow host whose alleged 'extreme outbursts of anger and public humiliation' led dozens of employees to be given sick leave. The host resigned and the Minister told the PSB to produce an action plan to prevent such behaviour. Then in March 2023, another story broke about bullying, (sexual) intimidation, and discrimination at the sports division of the PSB news channel NOS Nieuws. The editorial board for NOS Sport resigned and NOS has announced an organisation-wide investigation into its workplace culture.

Tim Groot Kormelink and
Irene Costera Meijer
Vrije Universiteit Amsterdam

[57] https://www.tijd.be/ondernemen/media-marketing/ceo-mediahuis-het-einde-van-de-papieren-krant-is-dichterbij-dan-we-dachten/10450316.html

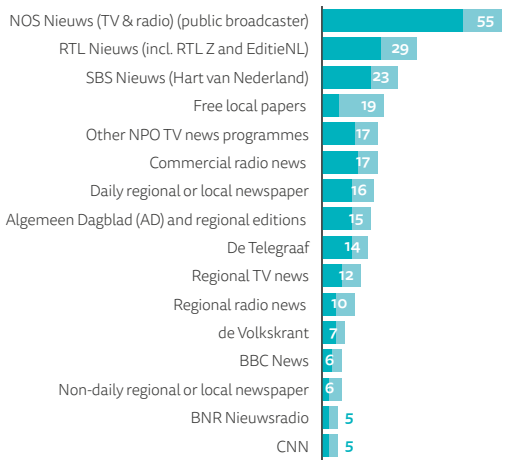
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

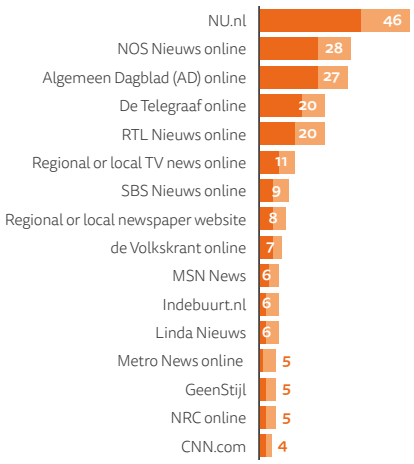
% Weekly usage

- 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



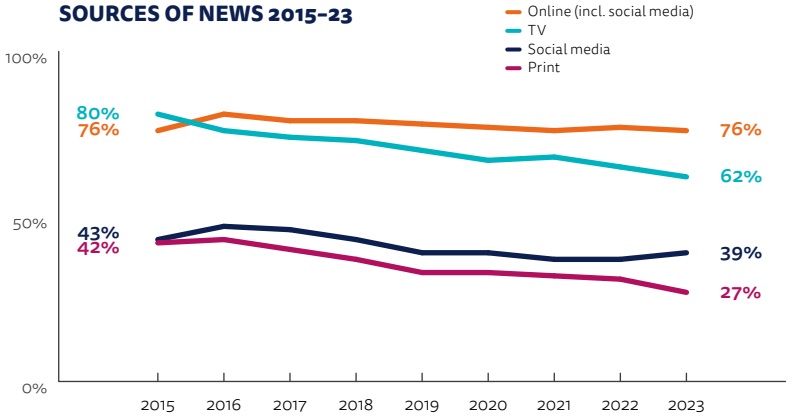
CHANGING MEDIA

Public broadcaster NOS and free, ad-driven NU.nl continue to dominate, respectively, offline and online news use. Traditional sources for news (TV, print) are down by around 5pp over the past two years, but online news remains stable overall.

17% PAY
pay for **ONLINE NEWS**

28%
listen to **PODCASTS** in the last month

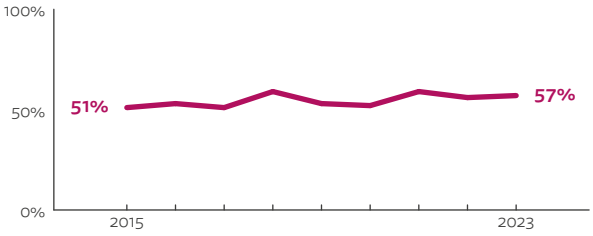
SOURCES OF NEWS 2015-23



TRUST

Dutch news continues to enjoy high trust levels, ranking equal 4th out of 46 countries. Public broadcaster NOS still is the most trusted brand, closely followed by commercial counterpart RTL Nieuws and local and regional newspapers. More partisan media and tabloid media tend to be less well trusted.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

57%
OVERALL TRUST =4/46 markets

REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2023	Score: 87	6/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Algemeen Dagblad (AD)	72%	20%	9%
BNR Nieuwsradio	61%	28%	11%
De Telegraaf	59%	23%	18%
De Volkskrant	68%	21%	10%
GeenStijl	31%	30%	39%
Hart van Nederland (SBS News)	62%	23%	15%
Het Financieele Dagblad	67%	24%	9%
Linda News	38%	35%	27%
Metro	57%	30%	13%
NOS News	80%	12%	8%
NRC	67%	23%	10%
NU (Nu.nl)	73%	18%	9%
Regional or local newspaper	75%	18%	7%
RTL News	75%	16%	9%
Trouw	66%	23%	10%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

23% SHARE
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	27%	(-)	60%
2	WhatsApp	17%	(-2)	76%
3	YouTube	14%	(-)	51%
4	Instagram	11%	(+1)	38%
5	Twitter	7%	(-)	14%
6	LinkedIn	5%	(-)	22%

Population	**5.5m**
Internet penetration	**98%**

NORWAY



The Norwegian media landscape combines strong national legacy brands and public service media with a reputation for innovation in content and business models. Norwegian media still do comparatively well but have also been affected by rising costs.

Norwegian consumers are again those most willing to pay for news across all 46 markets surveyed this year. With a strong newspaper reading tradition, combined with early investment in building up online subscriptions, 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 to explain the relative success of online news payment with national titles *VG*, *Aftenposten*, and *Dagbladet* cited most frequently. Continuing a trend from last year, evidence from our survey shows a marginal decrease in the percentage saying they had paid for news online (39%, down 2 percentage points), after the peak seen during the COVID pandemic. The decrease is greatest among low-income households (down 8pp), probably due to the rising cost of living.

Illustrating the pivot to podcasts and new subscription models, local newspaper owner Amedia acquired a stake in podcast production company Moderne Media last year, and included podcasts in its innovative all-access online news subscription package +Alt, which provides access to more than 90 titles across the country. Among all who subscribed in our survey, 4% identified as +Alt subscribers. This comes on top of the 50% of subscribers who already pay directly for one or more local or regional titles, which underlines how Norway is far from being a winner-takes-all market.

Financially, Norwegian news providers overall remain comparatively well-off. That said, rising costs in 2022 led to several regional newspapers scaling back on print, and Schibsted's national quality brand *Aftenposten* announced the end of its Sunday print publication. Entering 2023, Amedia announced a temporary hiring freeze, and Schibsted unveiled a plan for a €50m cut to its news division over the coming two years, citing increasing print costs. This follows Schibsted's earlier launch of its own all-access online news subscription package giving access to six newspapers, 44 magazines, and a series of podcasts.

Like last year, we see a continued professionalisation and promotion of podcasts for news and current affairs in Norway. Major news companies keep pushing original content, and are adding podcast content to online news subscription bundles to try to attract new customers. The two top podcasts are both deep dives: Schibsted's Aftenposten Forklart or 'Explained' (similar to the *New York Times* The Daily) and public broadcaster NRK's Oppdatert.

Everyday access to online news via social media remains a challenge for publishers. While the overall use by Norwegians of social media for news is low, use of TikTok is increasing fast, albeit from a low base (doubling 3pp to 6% since last year), with the increase unsurprisingly concentrated among younger users; a quarter of our respondents under 24 years old now say they use TikTok for news, compared with 57% overall use in that age group.

So-called news avoidance appears as a relatively minor issue in our survey, with the most-avoided topics being the war in Ukraine and climate change and environmental news.

As a NATO member, and a small country bordering Russia, the war in Ukraine has been prominent in Norwegian news. Main topics include humanitarian and military support, and deteriorating relations with Russia, evident from a succession of possible espionage incidents – ranging from suspected drone operations to the arrest of a suspected Russian spy.

A report from a high-profile government-appointed commission on free speech praised conditions for public debate, citing the ample opportunities for citizens to speak out and with reliable and diverse information sources widely available. The commission focused on hate speech and harassment of politicians and people in public life, especially representatives of minority groups. That topic has featured in Norwegian media during the last year, particularly following a terrorist attack during Oslo Pride in June. The recurring discussions of the role of publicly funded NRK also surfaced in the report, which suggested that NRK's substantial contribution to an informed public debate should be balanced against commercial media companies' ability to compete. In the subsequent debate, the Norwegian Media Businesses' Association highlighted this point.

Controversial so-called alternative news site Resett, known for right-wing critique of immigrant policy and mainstream media, had a turbulent year with its high-profile editor being dismissed, and successive ownership changes, before the site was bought back by the former editor and merged with new brand iNyheter.

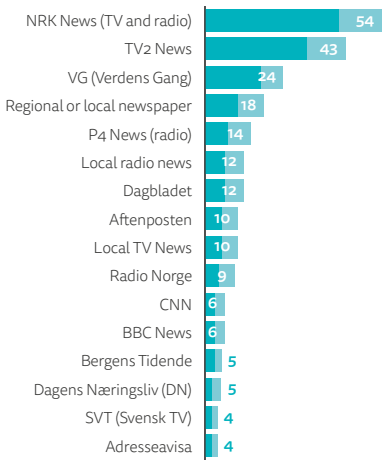
Hallvard Moe
University of Bergen

WEEKLY REACH OFFLINE AND ONLINE

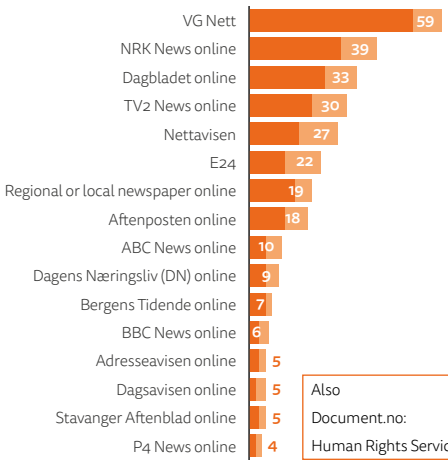
TOP BRANDS
% Weekly usage

- 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



Also
Document.no: **4%**
Human Rights Service/HRS: **2%**

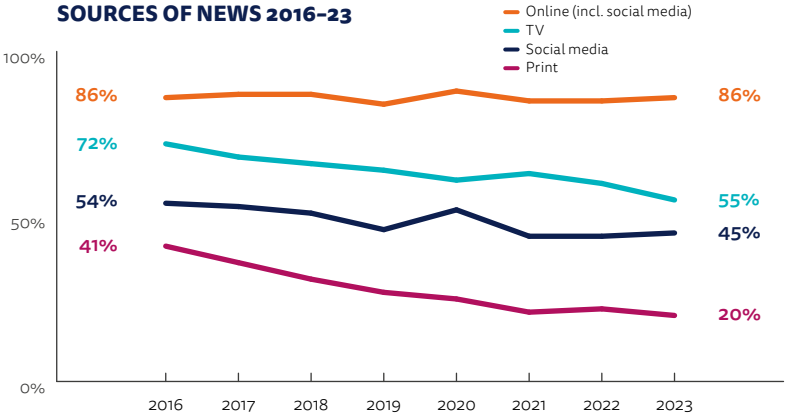
CHANGING MEDIA

PSBs NRK and TV2 keep their strong positions in offline news this year. Online, Schibsted-owned *VG* is first again, followed by NRK and other established brands. Among online business news providers, digital-born E24 – also owned by Schibsted – ranks clearly above legacy brand *Dagens Næringsliv* (DN).

39% PAY
pay for **ONLINE NEWS**

39%
listen to **PODCASTS** in the last month

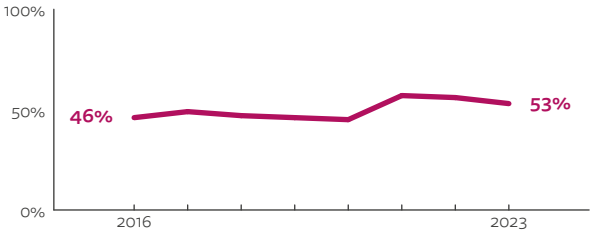
SOURCES OF NEWS 2016–23



TRUST

Overall trust in news remains comparatively high, with a slight decline to pre-COVID levels (53%, -3pp), with little polarisation. By brand, trust levels and rankings remain stable, with PSBs and local newspapers at the top. Tabloid news brands and so-called alternative news sites such as Document tend to be less trusted.

OVERALL TRUST SCORE 2016–23



Proportion that trusts 'most news most of the time'

53%
OVERALL TRUST
8/46 markets

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
ABC News	44%	33%	23%
Aftenposten	70%	18%	11%
Dagbladet	54%	22%	24%
Dagens Næringsliv	68%	22%	9%
Dagsavisen	56%	29%	15%
Document.no	28%	32%	40%
Klassekampen	48%	30%	22%
Nettavisen	54%	27%	19%
NRK News (public broadcaster)	80%	10%	9%
P4	60%	26%	15%
Radio Norge	56%	30%	14%
Regional or local newspaper	75%	16%	9%
TV2 News	74%	14%	12%
VG	65%	17%	18%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2023** Score: **95.18** **1**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

20%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	29%	(-2)	72%
2	YouTube	13%	(+1)	54%
3	Snapchat	11%	(-)	54%
4	Instagram	9%	(-)	50%
5	Facebook Messenger	9%	(-2)	54%
6	TikTok	6%	(+3)	21%

Population	**38m**
Internet penetration	**92%**

POLAND



Frightening headlines about Ukraine and the worsening economic climate have led Poles to avoid news and instead turn to entertainment. Combined with the post-pandemic headwinds and government pressure, this has deepened the long-standing crisis in independent news outlets.

The initial spike in news consumption caused by the war in Ukraine waned, and newsrooms had to face the harsh reality. Print media suffered as costs of paper skyrocketed and advertisers cut spending. Publishers responded by raising cover prices, laying off staff, and closing titles. Ringier Axel Springer Poland, Agora, Burda Media Poland, and Bauer all laid off hundreds of employees. Many publications were discontinued or shrunk, with Burda closing down 20 magazines, and Axel Springer terminating the print version of *Auto Świat* magazine and reducing the number of editions of the sports daily *Przegląd Sporotwy* to two a week.

Television, which is usually less vulnerable to the cyclical changes of the advertising market, had to face another problem. Big broadcasters saw their audience shrinking, faced with competition from all the major streaming players in Poland. In 2022, for the second year in a row, no show crossed the 5 million viewer threshold, compared with 2020, when there were six such shows, and 32 shows in 2019.

As people gravitated towards entertainment, France's Canal+ bought a 70% stake in SPI International, the owner of several TV channels and the new streaming platform Dizi.[58] Smaller legacy outlets had to shut down their business. Motor-Presse Polska, the publisher of magazines such as *Men's Health*, *Women's Health*, and *Runner's World*, filed for bankruptcy.

However, even small-scale media sympathetic to the government could count on steady streams of cash from state enterprises. Almost half of the 128 million zloty (€27.5m) spent in magazines in 2021 went to government-friendly opinion weeklies, while total ad spending by government ministries and agencies increased by 40% compared with 2020. PSB TVP had no reason to complain as parliament increased the annual grant for public service broadcasting from 2 billion (€425m) to 2.7 billion zloty (€576.6m).

TVP is widely criticised for its skewed, pro-government news coverage, with its trust scores among the lowest in our survey. In December, Poland's largest opposition party, the centrist Civic Platform (PO), submitted a bill that would abolish the public broadcaster news channel, TVP Info, which PO says has become a 'propaganda' outlet for the national-conservative ruling Law and Justice (PiS) party.[59]

The government supported TVP by effectively undercutting its competitors' reach and creating uncertainties around their business. The Electronic Communications Office (UKE) used the switchover to the new digital terrestrial television standard (DVB-T2) – which required some consumers to replace their TV sets or buy new set-top boxes – as an opportunity. Private TV stations had to switch to DVB-T2 in 2022, while TVP was allowed to stick to the old standard (DVB-T) until the end of 2023.[60] Meanwhile, the National Broadcasting Council (KRRiT) increased pressure on the largest commercial television station, TVN – which ranks top in weekly reach – owned by Warner Bros Discovery, by calling for the company's ownership structure to be investigated by an international auditor when applying for a licence renewal for one of its channels, which expires in June 2023.

Another tool for exerting pressure on independent media has been the state-owned oil company Orlen, the owner of Orlen Press, the largest group of regional dailies in Poland – employing 800 journalists – and Ruch, the second largest newspaper distributor. Daniel Obajtek, the controversial chairman of Orlen, has attracted criticism for his decision to remove the weekly magazine *Nie* featuring an image of Pope John Paul II on its cover from Orlen and Ruch sales points. The cover, which he regarded as blasphemous, was prompted by a documentary focusing on Pope John Paul II's alleged knowledge of paedophilia and sexual abuse within the Catholic Church in Poland. Obajtek's decision has been seen as further evidence of him acting as an instrument of the ruling party.

The only major launch for the Polish media market last year was I.pl – a news portal launched by Orlen Press with a staff of 44 journalists. The new outlet reached its target of 5 million unique users. However, a year after the takeover of the publishing business now known as Orlen Press, the state oil giant had to write down 33 million zlotys (€7m) from its 100% stake.

Vadim Makarenko
Director of Research Digital, Statista GmbH; former journalist, Gazeta Wyborcza and former Reuters Institute Journalist Fellow

[58] https://tbivision.com/2021/09/21/canal-buys-filmbox-kino-polska-owner-spi-international/
[59] https://notesfrompoland.com/2022/12/19/polish-opposition-submit-bill-to-abolish-state-tvs-propaganda-news-channel/
[60] https://www.broadbandtvnews.com/2022/03/29/poland-starts-dvb-t2-transition-amid-controversy/

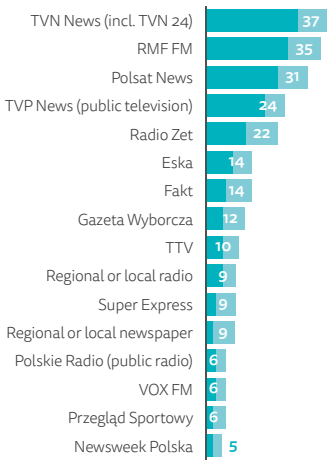
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

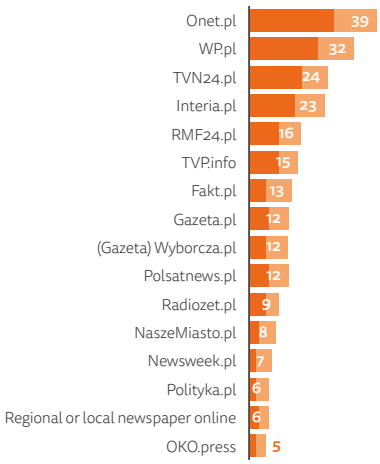
% Weekly usage

- 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



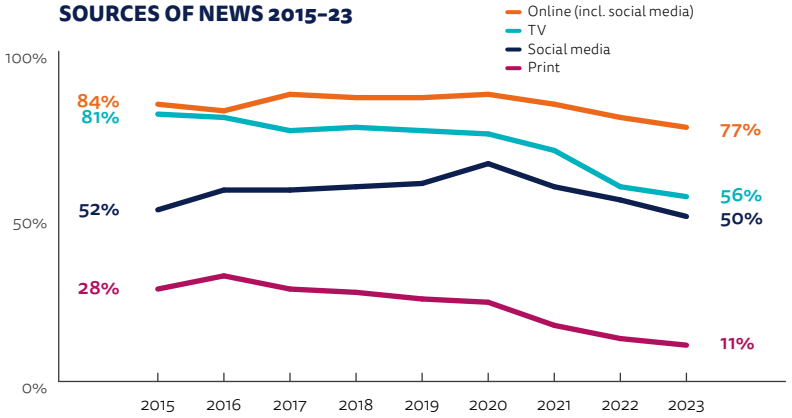
ONLINE



CHANGING MEDIA

Use of all sources of news is down and this is reflected in declining reach for major news websites. Among the top ten online news brands, only the PSB (TVP.info) saw an increase in reach of 2pp.

SOURCES OF NEWS 2015-23

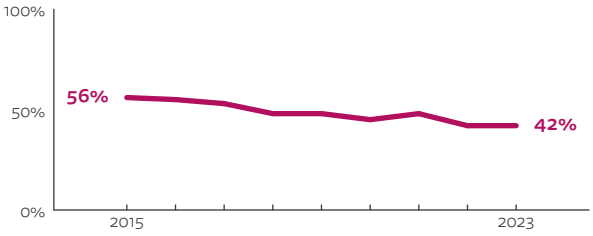


14% pay for **ONLINE NEWS**

TRUST

Trust in news in general (42%) has remained stable, though some brands such as Onet and Polsat News have experienced strong gains of 7pp. Traditionally, independent media tend to have higher trust ratings than state-controlled public broadcaster TVP, which holds the lowest trust ratings: 47% distrust it and only 28% trust it.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

42% **OVERALL TRUST =17/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **67.66** **57** / 180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Eska	44%	39%	17%
Fakt	33%	30%	37%
Gazeta Polska	31%	34%	35%
Gazeta Wyborcza	41%	28%	32%
Interia	44%	35%	21%
Newsweek Polska	44%	33%	23%
Onet.pl	46%	31%	23%
Polsat News	51%	29%	20%
Radio Zet	49%	34%	17%
Regional or local newspaper	45%	37%	19%
RMF FM	55%	31%	15%
Super Express	30%	34%	36%
TVN News	47%	27%	26%
TVP News (public broadcaster)	28%	25%	47%
WP.pl	44%	35%	21%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

35% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	48%	(-1)	71%
2	YouTube	30%	(-3)	65%
3	Facebook Messenger	19%	(-2)	54%
4	WhatsApp	12%	(-1)	36%
5	Instagram	12%	(-)	33%
6	TikTok	11%	(+4)	28%

Population	**10.3m**
Internet penetration	**88%**

PORTUGAL



The favourable impression created by continuing high trust in Portuguese news media only provides a partial picture of the situation. Journalists are up in arms about working conditions and wages falling behind inflation. At the same time, media companies are struggling for successful business models in a market where consumers are extremely resistant to pay for digital news.

As the rising cost of living hits consumers, the news business is also feeling the impact of structural economic changes. Many are still clinging to traditional business models, but declining print circulation and revenue are making the shift towards sustainable digital strategies ever more urgent. Portugal remains one of the markets with the lowest rates of paying for digital news (11%); consumers prefer to rely on free sources and, although some brands have developed paywalls, most are failing to win large numbers of subscribers.

Portuguese journalists have long suffered from low wages and poor job security. In the past year journalists have been active in demanding better working conditions, highlighting the relationship between job security and decent salaries and their ability to produce quality journalism. Localised strikes and protests have taken place with the support of the Portuguese Journalists Union, whose president has raised the possibility of a general strike.

According to APCT, the official body responsible for tracking circulation, falling print circulation and revenue is affecting all major national outlets. Modest rises in paid digital subscriptions cannot compensate for the losses in print sales and the huge reliance on print advertising. In 2022, Impresa's weekly *Expresso* led the market in terms of paid print circulation, followed closely by Cofina's *Correio da Manhã*. *Expresso* and *Público* both also have impressive digital subscription numbers (47,450 and 46,560 respectively) – *Correio da Manhã* is behind with 23,932. *Expresso* and *Público's* success is built on their early transition towards digital revenue and the gradual introduction of paywalled content online, even in a market where resistance to paying for online news is an issue. The digital landscape also includes a rich offer from advertising-funded sites Sapo portal and Notícias ao Minuto, which have considerable reach on the web and social media.

Audio and particularly podcasting are a key focus of investment for many organisations and some audio content now has more reach in podcast form than as a linear TV or radio show. Legacy print brands such as *Expresso* and *Público* now have an extensive range of podcasts, available for free, outside the digital subscription offer, and big legacy advertisers such as the banking, telecoms, or automotive sectors are starting to buy ad-space on the most-listened-to podcasts. Digital-native outlets such as Observador continue to rely heavily on podcasts to distribute their content.

Concerns over media concentration are rising again, as rumours circulate of a possible buyout of Cofina Group by another leading company, Media Capital Group. Cofina is the market leader in newspapers, with the best-selling daily paper *Correio da Manhã* and the successful TV news channel Correio da Manhã TV. Meanwhile, Media Capital is strong in TV with two 24-hour news channels (TVI and CNN Portugal). This explains why on 3 March 2023 the stock market regulator suspended trading in both companies until further information on the acquisition was made public.

In 2022, the media regulator ERC and the government agreed on the need to reform the press law, to help stakeholders adapt to the challenges of the digital age. Many hope that a new legal framework will provide clearer guidelines as to how journalism can address issues such as economic pressure from online platforms, the threat of disinformation, and new forms of revenue, such as sponsored or branded content.

The government has also announced plans to increase existing support for the ailing regional and local press. The Minister for Culture has recognised the need and pledged a 12.5% increase, since this funding has been frozen since 2015. The regional and local press see this increased support as essential to their future.

The current configuration of digital news brands seems unlikely to replace the democratic role played by existing regional and local media. A recent digital media map of Portugal[61] shows that they are mostly located on the coastal, heavily populated areas of the country. In January 2021, 27% of municipalities have become what are known as 'news deserts', having no digital news brand headquartered in their territory; about a quarter of all outlets are based in Lisbon.

Ana Pinto-Martinho, **Miguel Paisana**, and **Gustavo Cardoso**
ISCTE-IUL University Institute of Lisbon

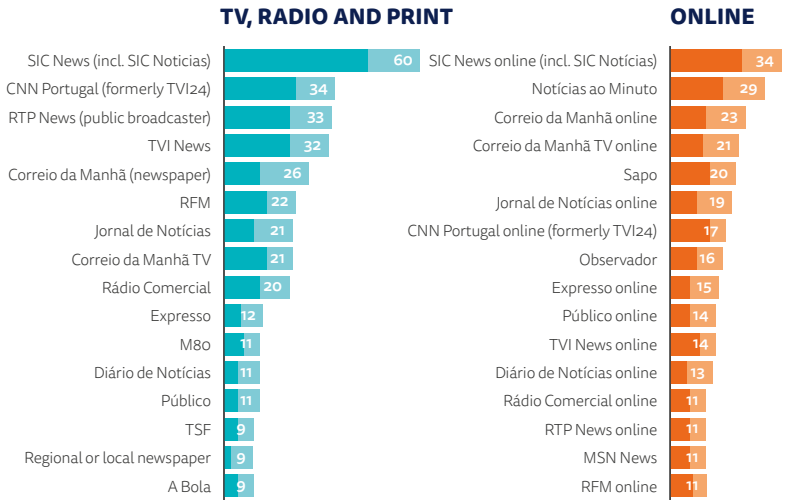
[61] Iberian Digital Media Map. https://map.iberifier.eu/

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



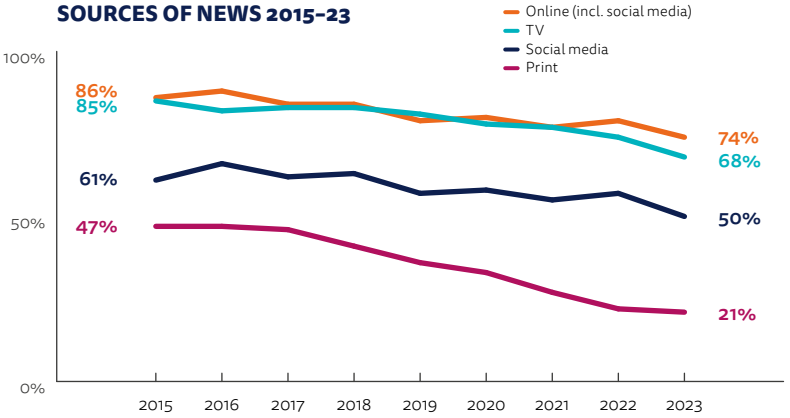
CHANGING MEDIA

Despite high reach offline, legacy TV brands face a more competitive scene in the online arena, where print and digital-born brands are increasing and diversifying their offer. TV remains central but online, mainly social, keeps getting traction among younger Portuguese.

11% pay for **ONLINE NEWS**

38% listen to **PODCASTS** in the last month

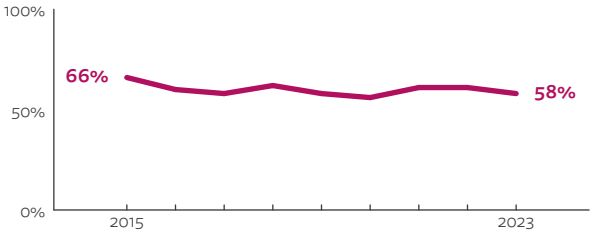
SOURCES OF NEWS 2015-23



TRUST

Portugal remains one of the highest-ranking markets for trust in news (3rd/46), due to low political polarisation and a generalised sense of the press as free (9th/180 according to the 2023 World Press Freedom Index). In a trust-enabled news ecosystem, most brands have high trust, with the public broadcaster RTP again the most trusted brand.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

58%
OVERALL TRUST
3/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **84.6** **9**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Agência Lusa	73%	20%	7%
Correio da Manhã	56%	21%	23%
Expresso	77%	16%	6%
Jornal de Notícias	77%	16%	7%
Notícias ao Minuto	70%	21%	9%
Observador	70%	21%	9%
Público	75%	18%	7%
Rádio Comercial	76%	18%	6%
Rádio Renascença	73%	19%	7%
RDP Antena 1	71%	21%	8%
Regional or local newspaper	66%	26%	9%
RTP News	78%	15%	6%
SIC News	78%	15%	7%
TSF	73%	20%	7%
TVI News	72%	17%	11%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

42%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	40%	(-9)	69%
2	WhatsApp	24%	(-)	68%
3	YouTube	23%	(-1)	64%
4	Instagram	23%	(+3)	54%
5	Facebook Messenger	14%	(-1)	49%
6	TikTok	9%	(+4)	26%

Population	19m
Internet penetration	78%

ROMANIA



There seems to be a major disconnection of digital audiences from news and public affairs in Romania, including coverage of the Ukraine war. Low trust, in general and for most media brands, has several chronic causes: party propaganda on public money, blocked investigations, smear campaigns against journalists, and difficult access to public interest information.

In an otherwise relatively stable media market, 2022 saw new channel launches from both the Romanian PSB, TVR, and Euronews. Then, in March 2023, Aleph TV, a 24-hour TV news channel founded in 2020, announced its insolvency. Euronews established a Romanian-language channel in a partnership with Politehnica University of Bucharest. TVR relaunched its 24-hour news channel, TVR info, and a cultural channel. Both were closed a decade ago, purportedly to stabilise the organisation's finances, just two months after TVR Info broadcast detailed coverage of a scandal about the then prime minister from the ruling PSD party, involving plagiarism in his Ph.D. thesis. Romanian public service TV and radio channels consistently appear in the most used weekly brands. Since 2017 their funding has come directly from the state budget and one consequence has been to make it harder for their journalists to cover contentious issues or scrutinise government decisions, with damaging consequences for public debate.

The commercial media brand leaders, offline and online, remained virtually the same. ProTV is the most used and most trusted brand in Romania, for offline and online news consumption. It is owned by CME, operating in six countries in the region. The next media brand, in offline usage, is Antena 1, a Romanian-owned general TV station, followed by Digi24, a 24-hour TV news channel with leading positions both offline and online, also Romanian-owned.

Independent investigative teams complain that public interest subjects are blocked by propaganda money and by difficulties using freedom of information laws. These subjects range from publicly funded residential homes to security legislation and can potentially annoy members of the ruling PNL (right)–PSD (left) coalition. The issue of public money used by politicians and public officials to buy the silence of central and local newsrooms remains unresolved and the situation has deteriorated: at least €10m were spent by the two coalition parties for positive coverage, according to Free Europe Romania (RFE/RL).[62] An attempt to remove legal protection for whistle-blowers was stopped by the European Union. Troublesome journalists and newsrooms are attacked. Investigative journalist Emilia Şercan was targeted by two smear campaigns, of which at least one was orchestrated by the PNL, according to a Council of Europe report.[63]

Yet investors are once again interested in online and TV. Last year, Romania's first digital-born newsroom, HotNews, was bought by a company whose owner already has some other news sites. This could help strengthen independent investigative journalism, since HotNews as an online daily, specialised in data journalism, will join the same group as Recorder, a website focused on investigative journalism and video storytelling, largely funded by reader donations.

Advertising is a growing source of media income – with an estimated 20% increase in digital revenues in 2022. Online media now claim more than one in every three euros, from an estimated total advertising market of €640m.[64]

TVR Info and Euronews as new arrivals have modest market shares but join an already crowded market for TV news channels, with five brands in our permanent list of TV, radio, and print news sources (Digi 24, România TV, Realitatea Plus, Antena 3 CNN, and B1TV). The 24-hour TV news channel Antena 3 announced a partnership with CNN International and changed its name to Antena 3 CNN, to try to increase brand recognition – but to the apparent confusion of supporters and critics.

Romanian news users, in common with those surveyed in neighbouring countries, often cited news about the war in Ukraine as one factor leading them to avoid the news. Nevertheless, with the Ukraine war on their borders, all newsrooms and all journalists have a publicly stated commitment to covering it well and particularly in verification and identifying fake news. Still, on several occasions, interviewees were asked to comment on clips from video games, presented as real war scenes. These mistakes may have further eroded trust in news, in general.

Raluca-Nicoleta Radu
University of Bucharest

[62] C. Andrei, '"Coaliția lu' Nicu și Marcel": Momente cheie ale politicii românești în 2022 și care sunt pericolele noului an', Europa Liberă România. https://romania.europalibera.org/a/pericolul-anului-2023/32189451.html.
[63] Council of Europe, 'Romanian Journalist Emilia Şercan Victim of Smear Campaign', Safety of Journalists Platform, 2023. https://fom.coe.int/en/alerte/detail/107637394
[64] Media Factbook. Romania 2022. https://www.mediafactbook.ro/

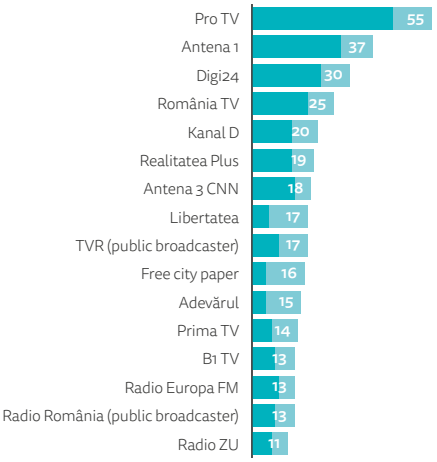
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

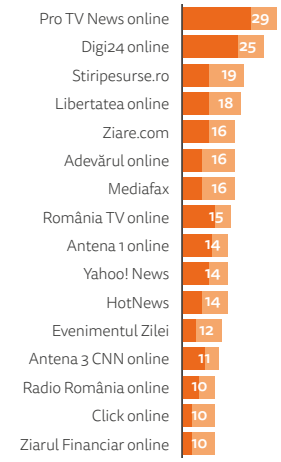
% Weekly usage

- 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



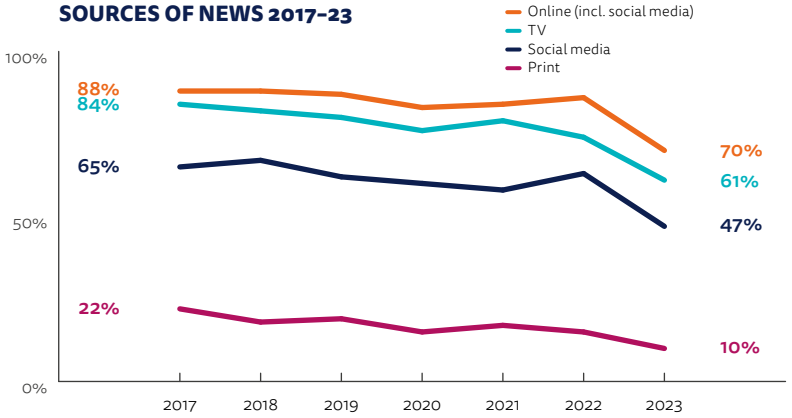
ONLINE



METHODOLOGY NOTE

We introduced education quotas for the first time in Romania as part of our programme to make data more representative of national populations. As a result, 2023 data will be more accurate but not always directly comparable with previous years. For example, the source chart shows a significant drop in all sources of news this year. Some of this drop will be related to the fact that there are more people with lower levels of education in our sample now, who typically have lower interest in news.

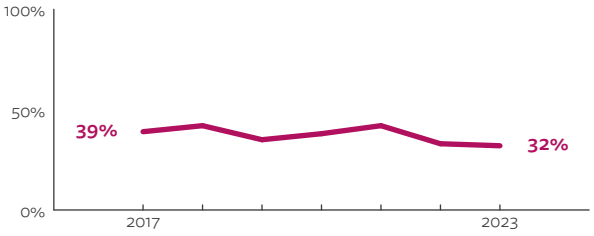
SOURCES OF NEWS 2017–23



TRUST

Only one in three members of the digital public (32%) trusts media in general. With trust again at an all-time low, Romania serves as a case study of how propaganda money, directed towards key newsrooms, and smear campaigns against investigative journalists affect trust in media, media usage, and professional pride, for the entire industry.

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

32%
OVERALL TRUST
=36/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **69.04** **53**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Adevărul	54%	26%	20%
Antena 1	57%	21%	22%
Antena 3 CNN	50%	23%	27%
Digi 24	62%	21%	17%
Evenimentul Zilei	52%	27%	22%
HotNews	50%	27%	22%
Kanal D	53%	25%	22%
Libertatea	52%	27%	21%
Pro TV	67%	17%	16%
Radio Europa FM	63%	22%	15%
Radio România News	62%	21%	17%
Regional or local newspaper	53%	28%	19%
România TV	48%	22%	30%
Știri pe surse	51%	26%	23%
TVR	60%	22%	19%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

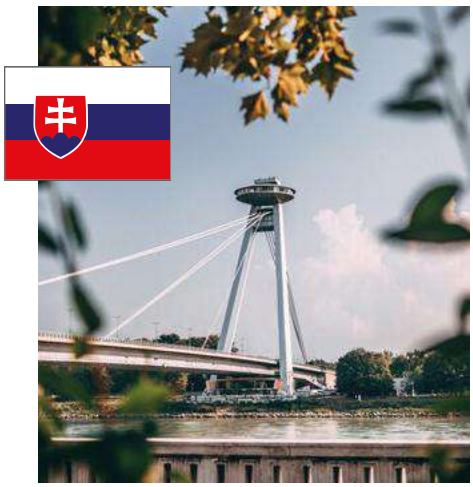
29%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	55%	(-8)	71%
2	YouTube	34%	(-2)	65%
3	WhatsApp	24%	(-7)	61%
4	Facebook Messenger	16%	(-4)	44%
5	TikTok	16%	(+6)	35%
6	Instagram	13%	(-1)	32%

Population	5.5m
Internet penetration	90%

SLOVAKIA



In a year that saw the collapse of the centre-right coalition government elected in 2020 and the scheduling of a new poll for September, the media scene is equally turbulent, including continued attacks on journalists by politicians, incidents of professional and ethical failings, and even espionage.

The long-awaited systematic reform of Slovakia's media legislation was finally completed in 2022. Along with the adoption of the law on publishers and publications which improves ownership transparency, parliament approved a platform-neutral law on media services to replace the existing broadcasting law. Designed to adapt the state's regulatory instruments to a digital media ecosystem, it obliges anyone who uses content-sharing platforms for profit-making purposes, including influencers, to apply to a new Council for Media Services for authorisation.

The blocking of the controversial, pro-Russia news website Hlavné správy under the powers of the amended cybersecurity law shortly after the outbreak of war in Ukraine was lifted in July 2022. While it was blocked, Denník N published video footage from 2021 showing a Hlavné správy journalist receiving a bribe from a Russian embassy employee to set up a spy network. Having pleaded guilty in court, he was given a three-year suspended sentence and a €15,000 fine. Hlavné správy reacted to the verdict by accusing several NGOs of being 'foreign agents' indirectly financed by the US government.

More than 30 years after the fall of communism, Slovakia's PSB RTVS still struggles to balance critical political reporting with its duty to inform people about political institutions.

Parliament elected Ľuboš Machaj as RTVS's new Director General in summer 2022. Machaj's appointment was seen as a fresh start after the era of Jaroslav Rezník, which coincided with the difficult period following the murder of investigative journalist Ján Kuciak and complaints by RTVS journalists that management didn't protect them from political pressures. His first months in charge, however, have also been hit by controversies.

On the anniversary of 1989's 'gentle revolution' RTVS broadcast former Prime Minister Robert Fico's party conference speech live and uninterrupted, which many interpreted as an act of propaganda. Machaj reacted by dismissing the head of news and current affairs and several other managers. Then the presenter of a political discussion programme 'Under the lid', investigative journalist Marek Vagovič quit RTVS just months into a production contract when TV bosses wanted to remove the programme from the main channel. They deny this was in response to political pressure. In 2023 there is a new state-funded system of financing for RTVS after the liberal SAS party succeeded in abolishing the licence fee. Opposed by RTVS management and its supervisory council, the move only adds to fears about independence from political interests.[65]

Verbal attacks on journalists by politicians from opposition and government parties continue. While some politicians defend press freedom, journalists and media organisations have been compared with organised crime syndicates and accused of corruption, media criticism has been likened to the Nazi propaganda machine, and female reporters are labelled prostitutes. Early this year the female presenter of an RTVS political discussion programme received credible death threats following verbal attacks against her by a leading politician.[66]

Media coverage of a double murder outside a Bratislava gay bar,[67] which Slovak police (for the first time ever) classified as a terrorist crime, revealed ethical shortcomings. The tabloid *Plus jeden deň* was found in breach of the Journalists' Ethical Code by the Press and Digital Council when it placed images of the victims' bodies on its front page.

The report by the Council for Media Services concluded that journalists sometimes lack the experience or skills to communicate effectively about such incidents and highlighted serious problems with the monitoring and moderation of online content by digital platforms: it accused Twitter and Facebook of failing to promptly remove inaccurate and hateful posts after the attack.

In response to the war in Ukraine and the resettlement of about 110,000 refugees during the first year of conflict, many Slovak media launched or expanded Ukrainian news services. RTVS already provided minority-language programming for the Ukrainian-speaking community (concentrated in eastern Slovakia) but it added a special information service for refugees during the first months of the crisis. TA3 runs a weekly ten-minute news service in Ukrainian and the newspaper *SME* has a Ukrainian version of its news portal. Denník N produced a special print edition in Ukrainian and ran a podcast about Ukrainian culture and history and ties with Slovakia.

Andrea Chlebcová Hečková
Constantine the Philosopher University, Nitra
Simon Smith
Charles University, Prague

[65] https://www.publicmediaalliance.org/slovakia-licence-fee-axing/
[66] https://spectator.sme.sk/c/23021323/journalists-reject-matovics-attacks.html
[67] https://www.bbc.co.uk/news/world-europe-63267451

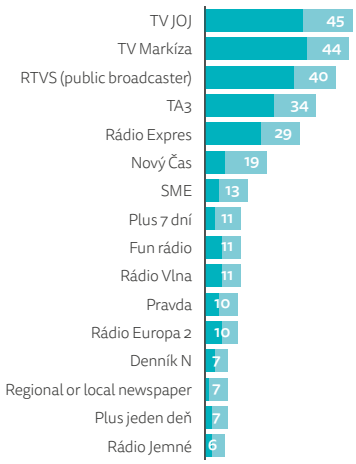
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

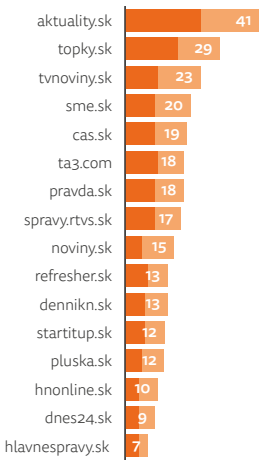
% Weekly usage

- 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

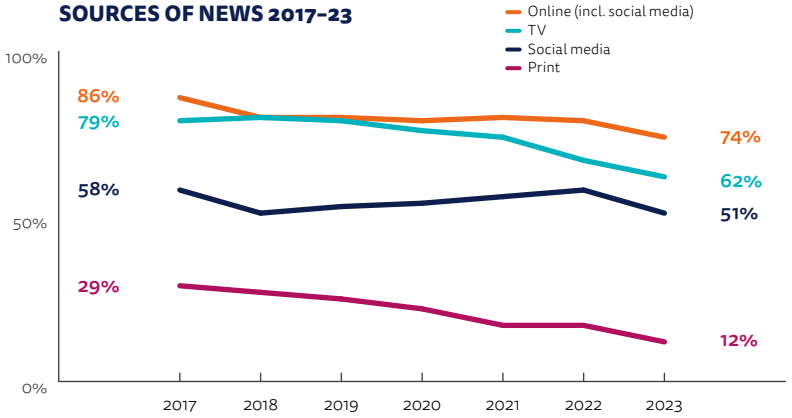


CHANGING MEDIA

The list of top brands is relatively stable. Among those who say they actively avoid news (37%), Ukraine, health (including COVID-19), and race or gender issues are (probably for very different reasons) the biggest turn-offs.

12% pay for **ONLINE NEWS**

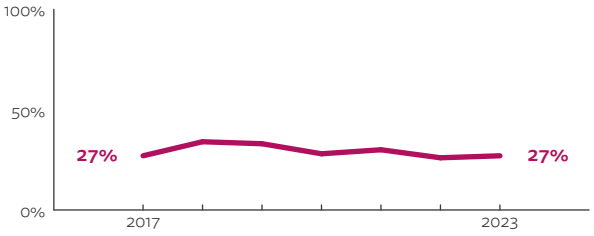
SOURCES OF NEWS 2017–23



TRUST

Very low trust (27%) in news in general reflects decades of interference by business and political leaders. TV stations, including the public broadcaster RTVS, tend to enjoy relatively high levels of trust, whereas digital-only brands are less trusted, even when they have high reach (e.g. Topky). However, one digital-only brand, Aktuality, stands out for its high reach and relatively high trust.

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

27% **OVERALL TRUST 44/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **83.22** **17** / 180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Aktuality	47%	25%	28%
Denník N	37%	26%	37%
Hospodárske noviny	48%	28%	24%
Nový Čas	30%	26%	44%
Plus*	34%	28%	38%
Pravda	42%	29%	28%
Rádio Expres	49%	27%	24%
Refresher	31%	34%	36%
Regional or local newspaper	48%	31%	22%
RTVS (public broadcaster)	54%	20%	25%
SME	41%	27%	32%
TA3	56%	22%	23%
Topky	30%	28%	42%
TV JOJ	46%	24%	30%
TV Markiza	42%	21%	36%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

* Last year we asked about Plus 7 dní not the wider Plus brand

28% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	48%	(-6)	71%
2	YouTube	25%	(-2)	63%
3	Facebook Messenger	15%	(-2)	49%
4	Instagram	11%	(-4)	32%
5	WhatsApp	9%	(-)	33%
6	Telegram	5%	(+2)	11%

Population	**47m**
Internet penetration	**93%**

SPAIN



Spain has a lively commercial news market with particularly intense competition in the online arena. The leading newspaper brands, *El País* and *El Mundo*, are succeeding with digital subscriptions, but are challenged by free news sites, such as 20 Minutos. Digital-born publications are achieving critical mass despite fragmented news consumption by increasingly distrustful and news-wary users.

One of the most significant changes was that, for the first time, a greater number of Spaniards accessed the internet (84.3%) than watched television (83.3%), according to the Association for Media Research (AIMC). In 2022, the number of minutes per day spent watching TV reached a 30-year low.

The decline of the print media sector continued, and the total number of newspaper readers fell below 6 million. According to AIMC, the sector has lost 60% of its readers over the last decade. Since 2019, the main Spanish news outlets have sought new revenues by charging for news online. According to self-reported figures, *El País* leads in numbers of digital subscribers (with 300,000, of whom 264,000 are digital-only subscribers), followed by *El Mundo* (115,000), *La Vanguardia* (77,000), and the digital-born elDiario.es (61,000). While the number of subscribers has increased (and particularly dramatically so in the case of *El País*), the main Spanish news brands are still heavily reliant on advertising revenue. Also, in late 2022, monthly audiences for three digital-born brands launched or relaunched in 2021 (El Debate, The Objective, and El Periódico de España) increased significantly into the millions, to the point of coming close to the well-established websites in our ranking.

Financial pressures have forced most publishing groups to respond, either by strengthening their digital subscription strategies, as with the Vocento group or the *Ara* newspaper, or by redesigning their digital and print editions such as *El Mundo* or 20 Minutos, which both upgraded their websites to adopt a more serious look. Vocento group also launched Relevo, a new digital sports newspaper, aimed at younger audiences.

The audiovisual sector underwent significant legal and market changes. The provisions of the new Audiovisual Communication Law (LGCA) extend the scope of those covered by regulation far beyond broadcast TV. For the first time, video streaming and sharing platforms and the most significant influencers such as vloggers are subject to regulation. This will require them to be registered with the government as suppliers of audiovisual services, assume new obligations to protect minors, add age ratings to content, and label advertisements correctly.

The new legislation changes the financing of PSB RTVE. As with the 2009 law, free-to-air commercial operators (mainly Atresmedia and Mediaset) hand over 3% of their gross revenue, with a total cap now set at 15% of RTVE's forecast revenue. Now video-on-demand over-the-top (OTT) services like Netflix, HBO, or Amazon Prime, and video exchange services such as YouTube, Instagram, and Twitch, will also contribute, with 1.5% of their gross revenue in Spain, as traditional pay TV services have done since 2009, with an overall cap of 20% of RTVE's predicted income.[68] Under the previous law, telecommunications operators also used to fund RTVE with a 0.9% tax on their gross revenues, which resulted in €125–140m annually since 2009.[69] Now their only contribution to RTVE will be based on their subscription TV and streaming video business.

RTVE has been lagging behind commercial competitors, such as Antena 3 and Telecinco on TV, and COPE, SER, and Onda Cero in news and talk radio, and it has gained a big increase in public funding and new leadership to improve its performance. RTVE has been allocated €530 million in the 2023 state budget, the largest amount since 2011. Elena Sánchez was appointed to replace José Manuel Pérez Tornero as president, with the challenge of improving its audience ratings, and the PSB is recruiting for over a thousand new permanent positions across the company. This expansion has already been reflected in strengthened international coverage, such as reporting on the war in Ukraine and live specials on elections in Brazil, France, and Italy.

The Spanish media market in 2022 saw trials with streaming content during the Qatar World Cup, with mixed results for Twitch experiments. *El País* and El Confidencial launched video channels on free ad-supported streaming television platforms. The former leader of left-wing populist political party Podemos and now influential commentator Pablo Iglesias, with support from media mogul Jaume Roures, launched his daily programme La Base on *Público*'s site and YouTube channel, where he criticised journalists and announced his planned online television channel, Canal Red.

Alfonso Vara-Miguel, **Samuel Negredo**, **Elsa Moreno**, **Jürg Kaufmann**, and **Avelino Amoedo**
University of Navarra

[68] https://www.boe.es/buscar/act.php?id=BOE-A-2022-11311
[69] https://www.lainformacion.com/espana/tribunal-constitucional-cierra-puerta-telecos-tasa-rtve-voto-particular/2876955/ https://www.huffingtonpost.es/-15.html; https://www.elmundo.es/economia/empresas/2021/05/07/609572b6fc6c83837a8b45e6.html

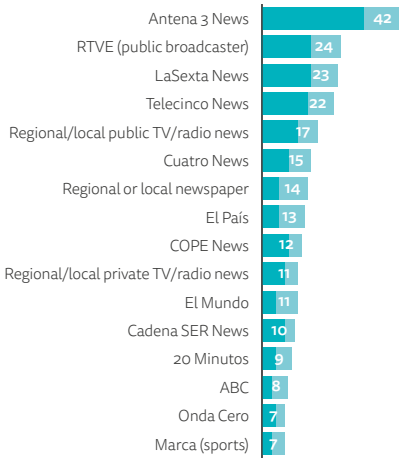
WEEKLY REACH OFFLINE AND ONLINE

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



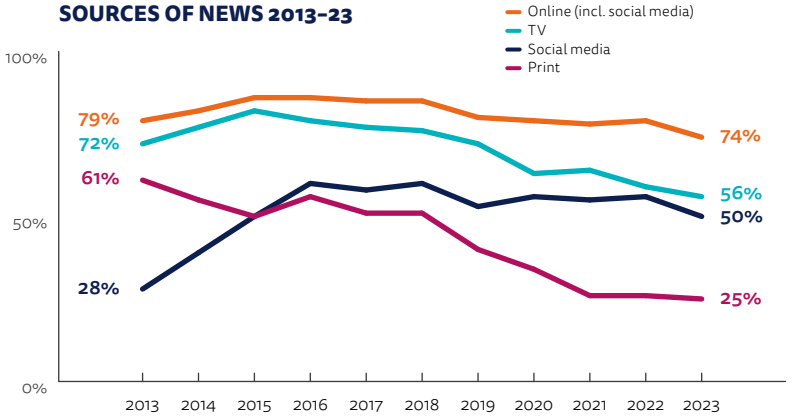
CHANGING MEDIA

The leading online site 20 Minutos, which was acquired by former regional group Henneo in 2015, has a growing readership that is well balanced in all socio-demographic criteria (gender, age, income, and education). It has also kept daily print editions in the four largest cities.

13% pay for **ONLINE NEWS**

45% listen to **PODCASTS** in the last month

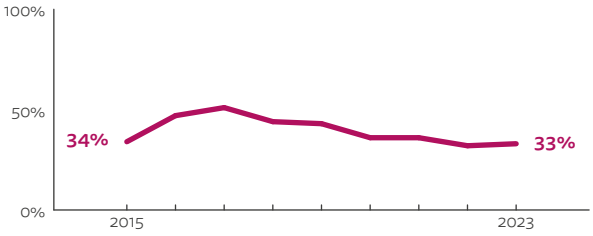
SOURCES OF NEWS 2013-23



TRUST

Mixed results: although the loss of trust in news in general has halted (at 33%) for the first time since 2017, distrust has reached its highest figure (40%) in the nine years covered by our survey, especially high among under-45s. At the same time, however, trust in many of the main news brands has increased significantly, by around 4–5pp, year-on-year.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

33%
OVERALL TRUST
=33/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **75.37** **36**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
20 Minutos	40%	35%	25%
ABC	41%	29%	30%
Antena 3	51%	25%	24%
Cadena SER	47%	27%	26%
COPE	45%	25%	30%
El Mundo	44%	28%	28%
El País	46%	28%	26%
ElConfidencial.com	37%	37%	25%
elDiario.es	39%	35%	26%
La Vanguardia	42%	32%	26%
LaSexta	42%	25%	33%
OKdiario.com	33%	30%	37%
Regional or local newspaper	52%	31%	17%
RTVE (public broadcaster)	48%	26%	26%
Telecinco	32%	25%	43%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

41%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	30%	(-5)	58%
2	WhatsApp	27%	(-5)	79%
3	Instagram	21%	(+4)	55%
4	YouTube	21%	(+3)	63%
5	Twitter	18%	(-1)	30%
6	TikTok	10%	(+5)	30%

Population	**10.2m**
Internet penetration	**97%**

SWEDEN



Swedish commercial news publishers have seen advertising revenues diminish over the years. They mostly rely on reader revenues, with Swedes being relatively positive about paying for news online. The relative importance of social media for distribution has declined.

Sweden is marked by near universal broadband access and extensive mobile internet penetration. Digital media have become an integral part of Swedes' everyday life, and this includes, but is not limited to, turning to internet-enabled devices such as smartphones and laptops to enjoy media content such as music, books, and video, and to get informed about the news, as well as communicating and carrying out tasks. In addition, so-called alternative news media – news sites that see themselves, or are perceived, as offering a corrective to the mainstream news media[70] have become influential among a substantial portion of the population.

Commercial news publishers as well as PSM institutions Swedish Television (SVT) and Swedish Radio (SR) have focused on their online presence, as well as cross-promoting some of their news and content on social media platforms. SVT has succeeded in securing a strong position in online news and has taken the plunge in shifting a lot of news investment out of broadcast into digital content. SR has developed native podcasts and SVT new video formats aimed at young people. Commercial publishers such as Aftonbladet, Expressen, Dagens Industri are also investing in podcasts and new audio formats.

Sharing news online is reported by 23%. Facebook is still the biggest social network overall but has become less important for news – down 5 percentage points this year to 24%. Publishers vary in their approaches to platforms, some being cautious about spending efforts that make them dependent on platforms non-proprietary to them, whereas others are keener on building presence on a diverse set of platforms.

A major reason why publishers have developed a platform presence has to do with their efforts to reach out to the young and young adults. The relationship between publishers and platforms is complex. On the one hand platforms can help publishers extend reach. But publishers are concerned about platforms benefiting from the data generated by their users and reaping much of the value from publishers, and thus want to reduce their dependence on them.

Publishers have increasingly turned to developing reader revenue strategies, and the *Digital News Report* findings show that 33% of Swedes pay for news, one of the highest figures in the survey. Overall, the most successful in terms of reader revenues are the evening tabloids *Aftonbladet* and *Expressen*, and the subscription-based *Dagens Nyheter* and *Svenska Dagbladet*, all of which have national coverage. Some brands like *Aftonbladet* try to mix free and premium content to maintain reach (47% online weekly) but also bring in subscribers using premium news and other content such as health, fitness, and weight management. Importantly, the loyalty of online news subscriptions differs from print subscriptions insofar as there are often special offers for trial subscriptions, and subscribers may well try these out for a relatively short period of time. From 2021 to 2022 the overall revenues for digital subscriptions for Swedish news publishers (excluding evening tabloids) increased by 15%. Importantly, digital subscriptions totalled €132m, whereas print subscription revenues were €418m. Overall, digital subscriptions thus account for around one quarter of all reader revenues.[71]

In 2021 69% of all Swedish advertising spend went to digital advertising. However, 72% of that digital investment went to search engines and social media platforms. In 2021 overall advertising expenditure increased to €4.64bn, meaning that publishers generally broke even on their own after years in which they were very dependent on subsidies, especially during the pandemic. Throughout 2022 the Swedish newspaper association has reported continuous growth in advertising revenues.[72] In spite of this, over the longer term publishers have struggled financially and in recent years have repeatedly shrunk their operations in efforts to reduce costs. As so much advertising revenue goes to the platform companies, many Swedish commercial news publishers are still dependent on subsidies and other support from the authorities. Swedish authorities are currently exploring how to design a reformed subsidy programme that can sustain news across the whole country, and that is better matched with a news industry increasingly focused on reader revenues.

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[70] K. Holt, T. U. Figenschou, L. Frischlich. 2019. 'Key Dimensions of Alternative News Media', *Digital Journalism* 7(7), 860–9.
[71] Swedish Newspaper Association/Tidningsutgivarna: email correspondence with Kajsa Holm, 3 Apr. 2023.
[72] https://dagspress.se/aktuellt/q3-2022-morgonpressens-annonsintakter-starktes-av-valet/

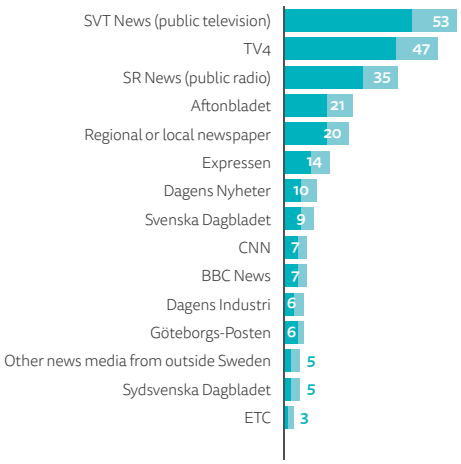
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

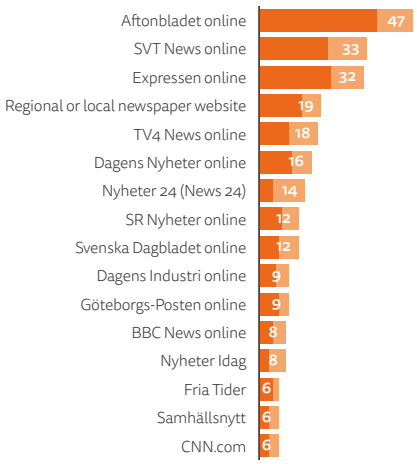
% Weekly usage

- 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



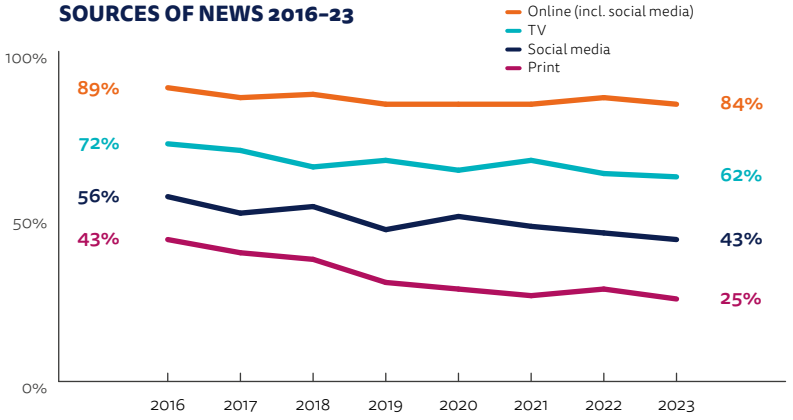
CHANGING MEDIA

Sweden is a digitally developed country. Online, including social media, is the leading source of news, but social media use for news has declined 10pp since 2018. Public service organisations (SVT and SR) and commercial news companies have significant user reach online.

33% pay for **ONLINE NEWS**

44% listen to **PODCASTS** in the last month

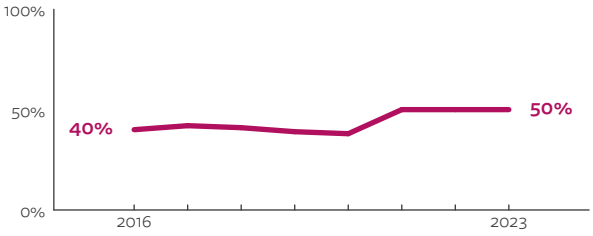
SOURCES OF NEWS 2016–23



TRUST

Overall trust in news remains at 50%. Trust increased markedly after 2020, probably due to COVID-19, but Sweden sustained that increase whereas elsewhere it generally fell back. Three out of four Swedes express trust in public broadcasters SVT and SR. There is also relatively high trust in local newspapers, which still play an important part in the Swedish media landscape.

OVERALL TRUST SCORE 2016–23



Proportion that trusts 'most news most of the time'

50% **OVERALL TRUST 10/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **88.15** **4**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Aftonbladet	54%	19%	27%
Dagens Industri	69%	20%	11%
Dagens Nyheter	67%	19%	15%
Expressen	53%	22%	25%
Fria Tider	28%	21%	51%
Ledarsidorna	48%	31%	21%
Local or regional newspaper	72%	17%	12%
Nya Tider	27%	23%	50%
Nyheter 24	42%	29%	28%
Nyheter Idag	40%	30%	30%
Samhällsnytt	37%	29%	33%
Svenska Dagbladet	67%	21%	12%
Sveriges Radio (SR) News	75%	12%	13%
Sveriges Television (SVT) News	75%	11%	14%
TV4 News	63%	20%	16%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

23% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	24%	(-5)	68%
2	YouTube	15%	(-1)	60%
3	Instagram	12%	(-)	56%
4	Facebook Messenger	9%	(-2)	51%
5	Twitter	8%	(+1)	18%
6	WhatsApp	5%	(-)	25%

Population	**8.8m**
Internet penetration	**96%**

SWITZERLAND



News media in Switzerland operate in linguistically distinct and relatively small markets. The public broadcaster remains strong but is under attack on several fronts. Meanwhile co-operation and concentration between and within commercial media companies are becoming increasingly important features of Switzerland's media system.

A move to centralised newsrooms producing content shared across multiple, previously separate distinct regional outlets, has become the norm at Tamedia (publishing brands like *Tages-Anzeiger*) and CH Media (with brands like *Aargauer Zeitung*). While this undoubtedly leads to more efficient use of resources, many worry about the impact of these moves on the quality and distinctiveness of the regional press and its repercussions for informed participation in Switzerland's vitally important direct democracy.

Swiss publishers are also hoping to increase efficiency through greater co-operation. The four largest media companies are expanding their joint industry project OneLog to provide users with a single login for online news content – both free and paid – from multiple providers. Switzerland's public broadcaster SRG SSR is co-operating with this commercial media initiative. The publishers hope that OneLog might help them gather their own user data, thereby compensating for the impact of privacy-inspired moves to limit third-party cookies and allowing them to compete better with platforms for attention and advertising.

The public broadcaster SRG SSR, whose SRF and RTS brands continue to be the most used and most trusted brands, is facing renewed pressure on multiple fronts. It has lost important sports rights to private competitors. A referendum on halving the public broadcast licence fee is looming, with right-wing politicians currently collecting signatures to trigger one. If this more limited referendum occurs – which would not happen until 2025 – the proposal seems likely to gather greater support than the complete abolition of the licence fee, which was rejected in the 2018 referendum.

The federal government is also expected to change the broadcaster's remit, possibly in response to pressure from private media and politicians who want the SRG SSR to reduce its sports and entertainment section and text-based news on its websites.

Faced with stagnating levels of paying for online news (17% in 2023) commercial media companies are looking for new revenue sources and have been lobbying for policies to make platforms pay copyright fees for link previews and news snippets. The government seems receptive to these calls, but action could take two to three years. Meanwhile, the political situation makes public subsidies for commercial media extremely unlikely. Swiss citizens rejected a package of support measures in a referendum in early 2022, and shortly afterwards parliament voted down even limited indirect subsidies to technological infrastructure for online news media.

Media companies have been in the spotlight in other ways as well. First, a 'leaks affair' dominated the headlines in early 2023. A CH Media-owned news outlet published leaked material which allegedly showed that a press officer working for a government minister (currently Switzerland's president) had repeatedly leaked sensitive information on COVID-related measures to the CEO of the media company Ringier – a touchy subject in a country where consensus and confidentiality among the members of the coalition government is considered essential.

Second, media companies and some of their high-level editors and journalists are increasingly criticised for creating toxic working environments. While it is unclear which types of misconduct actually occurred, these cases are often accompanied by labels such as #metoo or #mediatoo and thus perceived as issues of sexual harassment and abuse. Whether or not as a direct result from these scandals, both Tamedia (TX Group) and Ringier have recently shaken up their senior editorial teams.

Publishers are pursuing different digital strategies in terms of channels and formats. CH Media, for instance, is focused more on an on-site strategy, bundling its previously distinct regional newspaper, radio, and TV programmes into cross-media online brands. By contrast, 20 Minuten, Switzerland's largest brand online, is adapting more to the platforms, replacing its 'video first' strategy with a 'social media first' one. 20 Minuten and the public broadcaster have both built up substantial audiences not only on Facebook but also increasingly on newer platforms such as Instagram and TikTok.

Some forms of artificial intelligence (AI) have entered journalism, such as the personalisation of the news site blick.ch or the 20 Minuten app offering automatic translations into nine languages, including those of immigrant communities. Use of truly generative AI is limited to a few players. However, with the advent of ChatGPT in particular, AI is firmly on the agenda and media managers and journalists expect it to profoundly reshape journalism in the years to come.

Linards Udris and **Mark Eisenegger**
Research Center for the Public Sphere & Society (fög), Department of Communication and Media Research (IKMZ)/University of Zurich

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

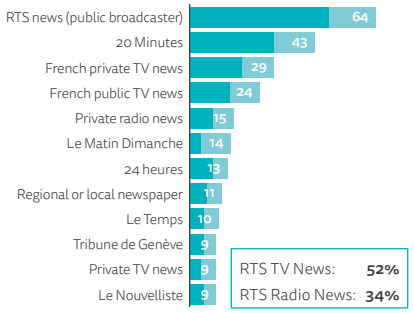
17% pay for **ONLINE NEWS**

French 20% | German 16%

36% listen to **PODCASTS** in the last month

French 35% | German 37%

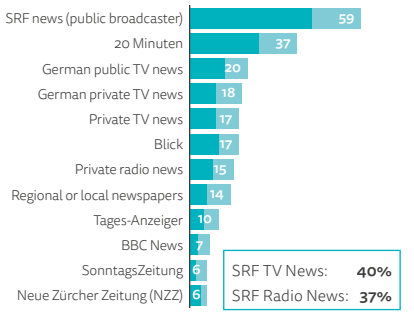
TV, RADIO AND PRINT (FRENCH SPEAKING)



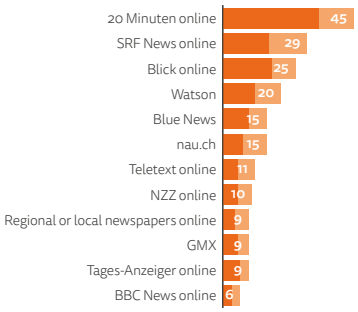
ONLINE (FRENCH SPEAKING)



TV, RADIO AND PRINT (GERMAN SPEAKING)



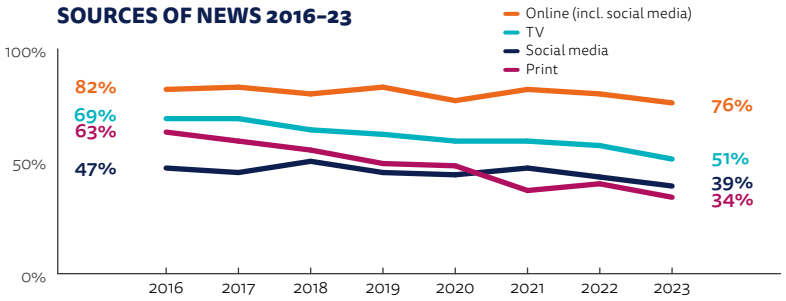
ONLINE (GERMAN SPEAKING)



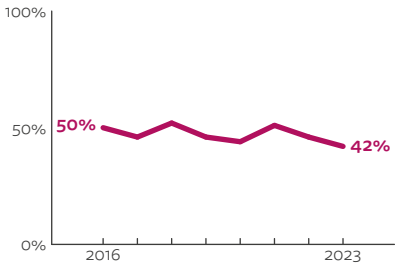
TRUST

Overall trust levels have moved up and down in recent years and have now fallen by 4pp. Brands from the public broadcaster remain the most trusted in both German-speaking and French-speaking Switzerland, followed by subscription-based newspaper brands. Less trust is placed in tabloids, digital-born brands, and news from email providers (Bluewin, MSN, Yahoo, gmx).

SOURCES OF NEWS 2016–23



TRUST IN NEWS 2016–23



42%
=17/46 markets
French 41%
German 43%

Proportion that trusts 'most news most of the time'

BRAND TRUST SCORES

Only the below brands were included in the survey so it should not be treated as a list of the most or least trusted brands as it is not exhaustive.

FRENCH

Brand	Trust	Neither	Don't Trust
20 Minutes	54%	23%	23%
24 heures	59%	29%	13%
Arcinfo	47%	38%	15%
Blue News	41%	39%	20%
La Liberté	51%	36%	13%
Le Matin	56%	26%	19%
Le Nouvelliste	50%	36%	14%
Le Temps	63%	26%	11%
MSN	28%	37%	34%
Private radio news	50%	35%	15%
Private TV news	52%	33%	15%
Regional or local newspaper	67%	23%	10%
RTS News	71%	20%	10%
Tribune de Genève	56%	32%	11%
Yahoo! News	26%	39%	35%

GERMAN

Brand	Trust	Neither	Don't Trust
20 Minuten	50%	23%	28%
Aargauer Zeitung	57%	26%	17%
Blick	38%	23%	40%
Blue News	47%	31%	21%
gmx	35%	37%	28%
MSN News	37%	32%	31%
NZZ	66%	20%	14%
NZZ am Sonntag	65%	21%	14%
Private radio news	58%	26%	16%
Private television news (e.g. Tele Züri)	61%	22%	17%
Regional or local newspaper	67%	21%	12%
SonntagsZeitung	60%	23%	17%
SRF News	73%	15%	12%
Tages Anzeiger	66%	20%	14%
Watson	45%	27%	27%

Q6_brand 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'. Details: 6-10 coded as 'Trust', 5 coded as 'Neither', 0-4 coded as 'Don't Trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	WhatsApp	26%	(-4)	75%
2	YouTube	24%	(-)	61%
3	Facebook	22%	(-5)	51%
4	Instagram	15%	(-)	42%
5	Twitter	7%	(+1)	13%
6	TikTok	6%	(+1)	17%

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **84.4** **12**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

Population	**86m**
Internet penetration	**85%**

TURKEY



After toughly fought elections, Turkey's strongman Recep Tayyip Erdoğan came out narrowly on top as president, despite concerns about soaring inflation and his government's handling of the aftermath of devastating earthquakes. The media, which is largely controlled by the president and his supporters, played a key role in his re-election, with access to critical voices on digital and social media also regularly restricted.

In the run-up to elections, the country was still coming to terms with the impact of February's devastating earthquakes that claimed more than 50,000 lives. Social media and messaging apps have played a crucial role in making the cries for help of the earthquake victims – as well as their friends and families – heard both from beneath the rubble and in the ensuing recovery period.

In 2023, Reporters Without Borders (RSF) described the government as pursuing a policy of 'near systematic censorship on the internet', and following the earthquake, internet users were subject to major access restrictions which were also criticised for interfering with rescue operations and relief efforts. On the third day of the earthquake, Twitter was temporarily blocked while many survivors trapped under the rubble were still actively tweeting details about their location, health condition, and urgent needs. The Deputy Transportation and Infrastructure Minister tweeted from his account to report on a formal meeting with Twitter to remind the platform of its responsibilities and to request co-operation in tackling disinformation and fake accounts, and preventing what he termed threats to public order from the circulation of sensitive content and information about earthquake casualties and survivors.

The second ban, introduced on 21 February 2023 and which remains in effect (in April 2023), targeted Ekşi Sözlük, a popular online discussion forum that relies on user contributions on user-initiated topics, allegedly for entries about the earthquake.[73]

These bans related to the earthquake follow existing clampdowns. In June 2022, when Voice of America and Deutsche Welle's Turkish-language websites were blocked on the grounds they had not applied for broadcast licences as requested by the Radio and Television Supreme Council (RTÜK), RTÜK suggested in a public statement that they would request the termination of the website blocks once the brands complied with Turkish laws; Deutsche Welle representatives reported considering the licensing as a form of government censorship on their editorial content.[74]

In the first half of 2022, government proposed measures against so-called disinformation provoked vigorous debates on their implications for internet users' freedom of expression. Then, in October 2022, the parliament ratified the 'Disinformation Bill' which defines 'publicly spreading disinformation' as a criminal offence, despite concerns openly expressed by the critics, press freedom watchdogs, and the Council of Europe.[75] The controversial law is very broadly drawn and suggests that those who intentionally publish fake news or misleading information that spreads panic or endangers security forces or the overall health of the Turkish society could be jailed for up to three years. In addition, prescribed maximum sentences can be increased by up to 50% if the alleged act of disinformation is carried out using an anonymous account or as part of an organisation's activities.

In the month after the law coming into force, a bomb explosion killing six people in the historic İstiklal Street in İstanbul was followed by an immediate government broadcast ban, making it very difficult for mass media outlets to share up-to-date details about the incident. As anonymous footage with graphic content from the scene (along with some from other unconnected incidents) had already started to circulate on social media platforms and messaging apps, the government limited the bandwidth of internet within two hours of the attack, which made it difficult for citizens to access sources other than those from the already restricted mass media.

With the country ranked 165th out of 180 countries reviewed by RSF in 2023, and with 90% of the national media reported to be under government control, the public has turned increasingly to critical or independent media outlets according to RSF. These include traditional media brands such as Fox TV, Halk TV, *Cumhuriyet*, and *Sözcü*, as well as international websites. Recently, broadcasts by Halk TV, Fox TV, and TELE1 received up to 5% administrative fines by RTÜK for reasons ranging from 'praising a criminal', for displaying a book by Selahattin Demirtaş, the former co-chair of People's Democratic Party (HDP) who has been under arrest since 2016, to 'failing to be objective' or 'making humiliating remarks' in covering the post-quake response efforts.[76]

Nic Newman
Senior Research Associate, Reuters Institute

[73] https://m.bianet.org/english/freedom-of-expression/274868-this-is-censorship-eksi-sozluk-ceo-slams-access-ban-vows-to-take-legal-action
[74] https://www.rtuk.gov.tr/kamuoyunun-dikkatine-/4346
[75] https://www.theguardian.com/world/2022/oct/13/turkey-new-disinformation-law-could-jail-journalists-for-3-years
[76] https://m.bianet.org/english/media/276147-five-major-tv-outlets-fined-by-rtuk

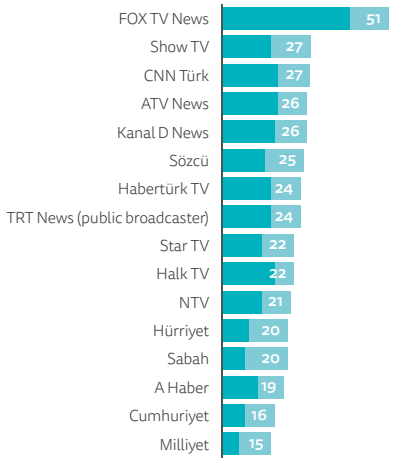
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

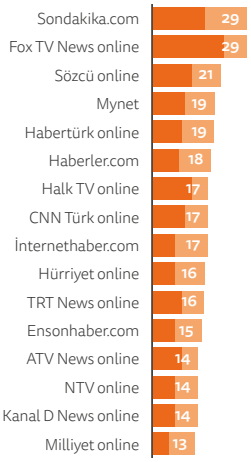
% Weekly usage

- 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



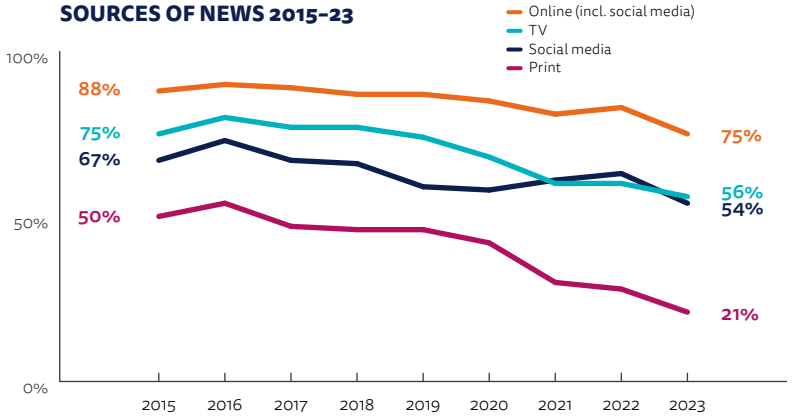
ONLINE



CHANGING MEDIA

While online and social media sources combined are preferred for news, print and television news continue to decline. YouTube (45%) and Instagram (40%) are the main social networks for news and Twitter (26%) lags behind Facebook (33%) and WhatsApp (28%).

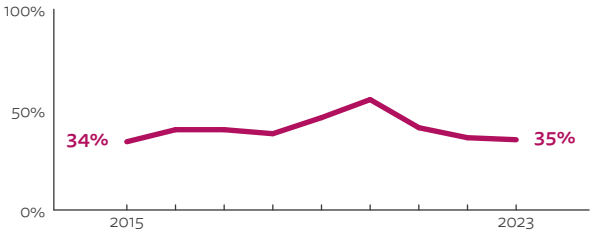
SOURCES OF NEWS 2015–23



TRUST

Overall trust in news remains stable at 35%. With most of the media estimated by RSF to be under government control, brand-level trust is heavily influenced by political orientation. Fox TV, with the largest offline reach, is the most trusted brand according to our respondents and another brand known for its oppositional stance, *Cumhuriyet*, scores high on trust.

OVERALL TRUST SCORE 2015–23



Proportion that trusts 'most news most of the time'

35%
OVERALL TRUST
=28/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023

Score: **33.97**

165/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
A Haber	36%	18%	46%
ATV	37%	20%	44%
CNN Türk	49%	22%	29%
Cumhuriyet	51%	24%	25%
FOX TV News	58%	19%	24%
Habertürk	48%	27%	26%
Halk TV	49%	23%	29%
Hürriyet	40%	27%	33%
Kanal D News	41%	27%	32%
Milliyet	39%	28%	33%
NTV News	49%	26%	25%
Sabah	37%	24%	39%
Show TV News	39%	27%	34%
Sözcü	48%	25%	27%
TRT News	48%	18%	34%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

43%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	YouTube	45% (+2)	70%
2	Instagram	40% (-)	65%
3	Facebook	33% (+1)	54%
4	WhatsApp	28% (-3)	68%
5	Twitter	26% (-9)	37%
6	TikTok	10% (+2)	22%

SECTION 3



SECTION 3

Analysis by Country and Market
Americas

AMERICAS		
3.25	United States	108
3.26	Argentina	110
3.27	Brazil	112
3.28	Canada	114
3.29	Chile	116
3.30	Colombia	118
3.31	Mexico	120
3.32	Peru	122



Population	**331m**
Internet penetration	**90%**

UNITED STATES



A string of major stories dominated headlines and drove news interest in the United States over the last year, including the war in Ukraine, the landmark Supreme Court decision overturning the constitutional right to abortion, and the 2022 midterm elections. Meanwhile, US news organisations have faced another wave of layoffs and downsizing.

Tentative evidence suggests that both news interest and news trust are rebounding in the US after significant drops last year. Our 2023 US survey finds that 73% of respondents report accessing news at least once per day, up 6 percentage points from the previous year, while interest in news has recovered slightly, and trust rebounded by 6pp after last year's lows. Although news engagement remains well below peaks at the height of the COVID pandemic and the 2020 election, recent increases hint at a recovery from the wave of 'tuning out' that followed the Trump presidency.

Despite this, the news industry continues to reel from economic woes following the pandemic, with multiple rounds of large-scale layoffs. In December 2022, Gannett, the largest newspaper chain in the country, announced that it would cut 6% of its company's US media division, around 200 jobs, including employees at *USA Today*, *The Indianapolis Star*, and *The Detroit Free Press*.

This move followed the elimination of 400 jobs at Gannett publications the previous August. It also reflects continued challenges facing the local-news sector. According to the *State of Local News 2022* report from Northwestern University, more than 360 newspapers closed in the US between late 2019 and May 2022, and all but 24 were weekly newspapers serving small to mid-size communities. Efforts to preserve local news are multiplying, however. These include non-profit and diversified commercial business models, start-up labs, local and national funding opportunities, and moves back to local ownership.

The national picture is similarly grim. CNN has announced layoffs affecting hundreds of employees, as well as the end of live programming on HLN, CNN's sister channel. National Public Radio cut 10% of its staff and discontinued production on four popular podcasts in an effort to address a $30m budget deficit. Vox Media, the umbrella company for brands such as Vox.com, SB Nation, *New York Magazine*, Vulture, and NowThis, laid off 7% of its workforce in December 2022, a total of about 130 jobs. And then, in April 2023, BuzzFeed closed its entire news division, citing lack of support from big platforms, marking the end of an era for a model of digital-born journalism that had once attracted significant investor backing for its promises to upend the industry.

In April 2023 Rupert Murdoch's Fox News agreed to pay $787.5m in an out-of-court settlement of a defamation lawsuit from the voting machine company, Dominion. The company argued that its business had been harmed by the network spreading false claims that the 2020 presidential vote had been rigged against Donald Trump. A few days later Fox dispensed with the services of star prime-time host Tucker Carlson, while over at CNN anchor Don Lemon was fired after a string of controversies over on-air comments and treatment of female colleagues. Amid falling ratings, cable TV news is looking to reposition itself after the controversy-fuelled highs of the Trump years.

Meanwhile, unionisation efforts remain a notable trend in US newsrooms, from local newspapers to national magazines to TV stations to digital natives. Pew Research reported in August 2022 that one in six US journalists is a union member and more suggested they would join a union if it were available.[77] Interest and membership in unions is more prevalent among younger journalists (ages 18–29) as well as among women and journalists of colour.

The news industry has also seen many bright spots. Poynter reported that, although pageviews and unique visitors for local newspaper sites fell 20% in 2022, subscriptions rose among small, medium, and large newspapers. Data from the Medill Subscriber Engagement Index showed increases in subscriptions from September 2021 to August 2022 for eight large metropolitan daily newspapers, including the *Philadelphia Inquirer*, the *Boston Globe*, and the *Minneapolis Star-Tribune*. The *New York Times* also continues to see digital growth, adding more than 1 million digital-only subscribers in 2022, bringing its total number to 9.6 million. Subscription gains are not universal, however, as some publishers, including the *Washington Post*, have seen stagnation and even declines.

Big tech companies have faced their own woes this year; Facebook has laid off more than a quarter of its workforce as its pivot to the metaverse falters, while TikTok has been blocked by public institutions across the country as many lawmakers call for it to be banned outright as a national security risk. Meanwhile, journalists and researchers continue to debate the challenges and opportunities of AI for journalism, with BuzzFeed's lifestyle verticals using it to create travel guides and quizzes – and Bloomberg launching its own GPT tool. Tech news outlet CNET published corrections on a series of AI-generated stories after Futurism.com pointed out errors.

Joy Jenkins
University of Tennessee, Knoxville
Lucas Graves
University of Wisconsin-Madison

[77] https://www.pewresearch.org/short-reads/2022/08/04/about-one-in-six-u-s-journalists-at-news-outlets-are-part-of-a-union-many-more-would-join-one-if-they-could/

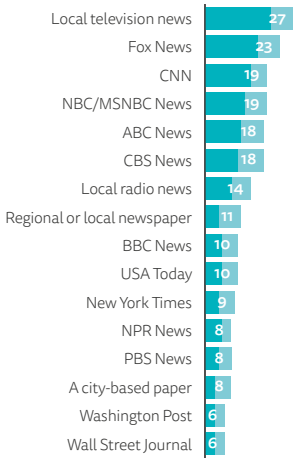
WEEKLY REACH OFFLINE AND ONLINE

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



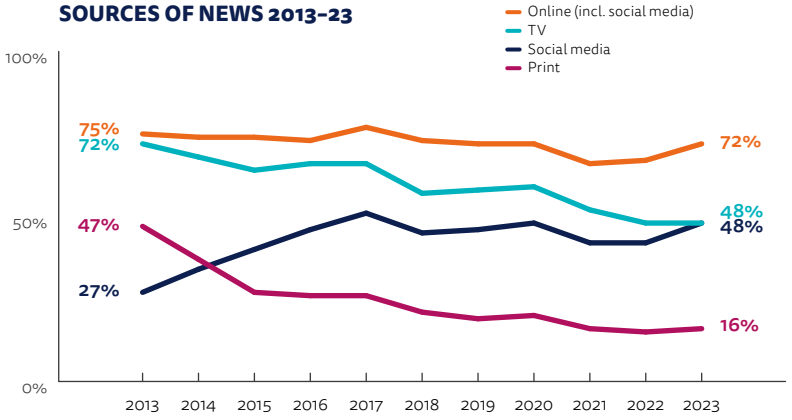
CHANGING MEDIA

Americans are watching less television news each year and printed media have been on the slide for decades, but interest in online and social media is hotting up again as the next presidential election cycle approaches. Facebook remains the top social network for news, while Twitter remains a major force despite changes forced through by Elon Musk.

21% pay for **ONLINE NEWS**

41% listen to **PODCASTS** in the last month

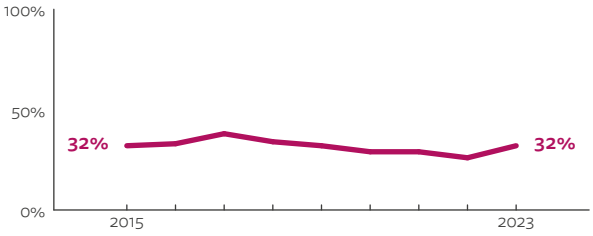
SOURCES OF NEWS 2013-23



TRUST

Trust in news (32%) has recovered somewhat from last year's lows – registering a 6pp jump. If these encouraging figures reflect a slight cooling of partisan rancour in an electoral off-year, longer term declines in news trust are likely to be reasserted during the looming presidential race. The US remains well in the bottom half of countries surveyed in terms of news trust.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

32% **OVERALL TRUST =36/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **71.22** **45**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
ABC News	48%	21%	30%
BBC News	50%	27%	22%
BuzzFeed News	30%	32%	38%
CBS News	49%	22%	29%
CNN	45%	18%	37%
Fox News	38%	18%	44%
HuffPost	37%	29%	35%
Local television news	61%	22%	18%
NBC/MSNBC News	46%	21%	33%
New York Times	45%	23%	33%
NPR News	46%	22%	31%
USA Today	42%	29%	29%
Wall Street Journal	47%	27%	26%
Washington Post	44%	25%	31%
Yahoo! News	36%	32%	32%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

31% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	29%	(+1)	59%
2	YouTube	24%	(+5)	59%
3	Twitter	14%	(+3)	25%
4	Instagram	12%	(+5)	35%
5	Facebook Messenger	7%	(-1)	35%
6	TikTok	6%	(+2)	19%

Population	**46m**
Internet penetration	**91%**

ARGENTINA



The media in Argentina are characterised by concentrated private ownership, weak public broadcasters, growing distrust in all news outlets, and decreasing interest in news among the population in the aftermath of COVID-19. A presidential election in 2023 could spur public interest in information but also could see increased levels of polarisation.

Interest in news has declined steadily in the past six years. The percentage of audience members who declared they were extremely or very interested in news went from 77% in 2017 to 43% in 2023; 9% of respondents say they have not used any source of news in the past week, and almost half report that they often or sometimes actively avoid the news.

The decline of printed newspaper circulations has continued. *Clarín*, the top-selling print title, reported Sunday circulation of 150,000 at the end of 2022, down from 200,000 the year before.[78] Although digital subscriptions grew to 550,000, paywall revenues are just a third of the combined print and digital revenues. By comparison, *Clarín´s* main competitor, *La Nación*, saw its digital subscriber base increase to 365,000 in the same period. Both newspapers announced they would be dropping their traditional Sunday magazines in 2023 to focus on online content. Other legacy print media, such as *Perfil*, *Los Andes*, and *La Voz*, have maintained their paywalls. However, digital natives such as Cenital and elDiarioAR have continued to rely on membership programmes to generate revenue.[79] These packages combine access to news online with daily or weekly newsletters. For instance, Cenital sends more than 1.5 million emails a month, and has an opening rate of 48.5%.[80]

The two top online news outlets in early 2023 were Infobae, used by 38% of respondents, and the website and apps of cable news channel Todo Noticias (TN), which more than three out of ten reported having visited. Neither has a paywall or membership system. Willingness to pay for news remains low: only 12% of respondents say that they have paid for online news at all during the previous year.

Free-to-air television viewership has continued its decline, with 19.6% average ratings spread across all the stations during 2022. The top TV newscast, *Telefé Noticias*, had an average rating of 10.4% throughout the year. Although there are seven news cable stations for a population of just over 45 million people, their combined average rating was 8.4%.[81] Levels of television viewership increased in November and December, as Argentines followed the progress of their national team in the football World Cup in Qatar.

Print legacy media and broadcast and cable news have tended to reflect the country's polarisation, as ownership of these news outlets is concentrated in the hands of organisations with long-standing political relationships. For instance, both *Clarín* and *La Nación* and their sister cable news channels have been critical of President Alberto Fernández and Vice-President Cristina Fernández de Kirchner. Conversely, print-based *Página/12*, owned by a large trade union, and C5N, purchased in 2012 by businessman Cristóbal López who has ties to Ms Kirchner, have been supportive of the government. La Televisión Pública, the public broadcaster, cannot function as an effective alternative to private media, due both to its relatively low ratings and the perception that it is biased in favour of the government.

In this scenario of declining interest in news, our data show that access to information content on social media platforms has decreased across the board: fewer than half of respondents say they have read news on Facebook, and only around three out of ten report having accessed news on Instagram, WhatsApp, or YouTube.

Although podcasts have continued to be a source of information for around a third of the audience members, their uptake has not increased. Reading and watching, in that order, rather than listening, are still people's preferred ways to consume news online. This is reflected in the increasing number of newsletters available, both from news organisations and individual journalists, on topics as diverse as politics, literature, sports, and parenting.

Although neither polarisation nor relatively high distrust of media are new developments, the levels of both disinterest in news and active news avoidance have never been higher. It remains to be seen whether the campaign coverage for October's presidential election will affect these trends.

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Pablo J. Boczkowski
Center for the Study of Media and Society, Argentina (MESO)

[78] Grupo Clarín Financial Statement 2022. https://finance.yahoo.com/news/grupo-clar-n-announces-full-004500115.html
[79] elDiarioAR 'About Us': https://www.eldiarioar.com/quienes-somos/
[80] Soledad Domínguez. 'How do Independent Media in Argentina Hold up in the Economic Crisis?', *LatAm Journalism Review*. https://latamjournalismreview.org/articles/how-do-independent-media-in-ar
[81] Data from Kantar IBOPE media, Argentina.

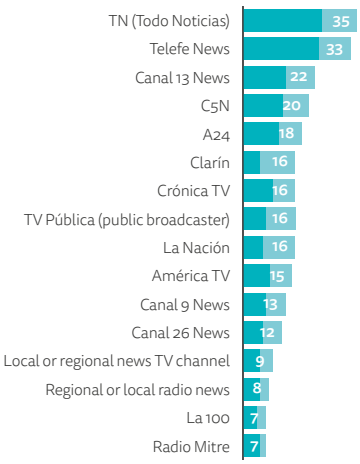
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

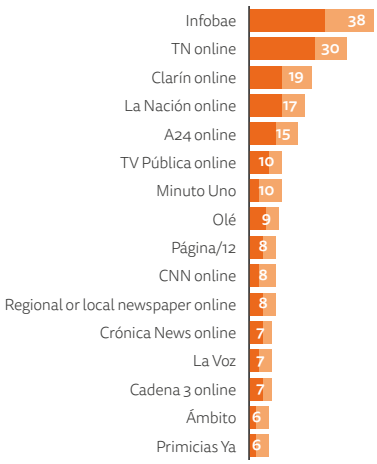
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TV, RADIO AND PRINT



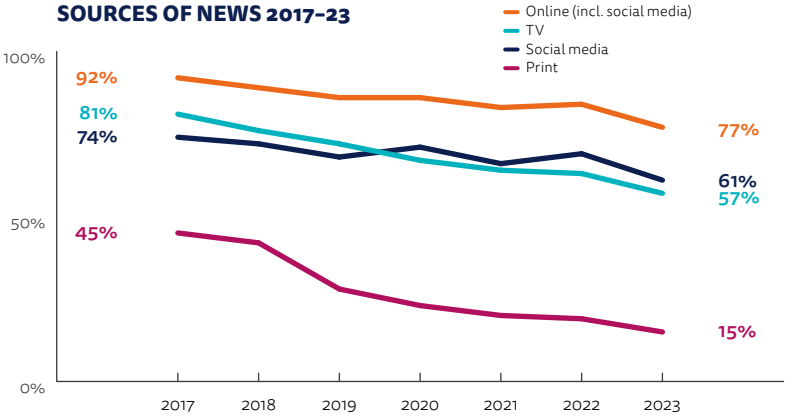
ONLINE



CHANGING MEDIA

News consumption has declined in every medium: news sites and apps, television, and newspapers, and also on social media networks which had in previous years seen growth.

SOURCES OF NEWS 2017–23



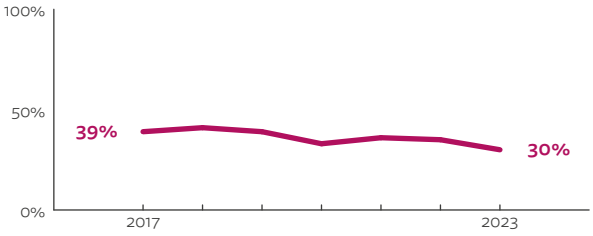
12% pay for **ONLINE NEWS**

33% listen to **PODCASTS** in the last month

TRUST

Trust in news media in general has declined 5pp, from 35% to 30%. Moreover, trust in media sources respondents say they use has also decreased from 42% to 36%. Argentina is among the countries with the lowest level of media trust. However, individual brands such as *Telefé Noticias* and TN have continued to be perceived as trustworthy by most audiences.

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

30%
OVERALL TRUST
=38/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **73.36** **40**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
A24	43%	33%	24%
C5N	34%	26%	40%
Canal 13 News	50%	27%	23%
Clarín	41%	27%	32%
Infobae	47%	30%	23%
La Nación	46%	27%	27%
La Voz	35%	41%	24%
Minuto Uno	31%	41%	28%
Olé	45%	35%	21%
Página/12	32%	35%	33%
Perfil	30%	40%	29%
Regional or local newspaper	42%	37%	21%
Telefé News	56%	27%	17%
TN (Todo Noticias)	52%	24%	24%
TV Pública News	36%	29%	35%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

41%
SHARE NEWS
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TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	48%	(-8)	70%
2	Instagram	32%	(+1)	61%
3	WhatsApp	31%	(-4)	78%
4	YouTube	27%	(-)	68%
5	TikTok	11%	(+4)	27%
6	Twitter	11%	(-2)	19%

Population	**215m**
Internet penetration	**83%**

BRAZIL



Last year's highly contested presidential elections, which were followed by riots in the capital, seem to have taken a toll on Brazilians' trust in the news. Yet, conversely, the close leadership battle may have had a positive effect on the willingness of people to pay for online news content.

The showdown between the leftist candidate Luiz Inácio Lula da Silva and the incumbent far-right president Jair Bolsonaro was by far the year's biggest news event. It engaged the attention of millions of Brazilians and may have contributed to a 13-point decline in news avoidance, down from last year's historical high (54%) to 41%.

Lula's victory by a slim margin in the run-off election held in October triggered a series of protests across the country that culminated in riots by Bolsonaro's supporters in Brasilia on 8 January. At least 16 journalists were attacked while trying to cover the invasion of the Supreme Court, the National Congress, and the presidential palace.[82] More than 1,800 people were detained in connection with the vandalism of government buildings.[83]

President Lula blamed the invasion on a disinformation campaign which was 'nurtured, organised, and disseminated' through digital platforms and messaging apps. Telegram groups and channels were widely used, and many protesters live-streamed events. Lula called for the regulation of digital platforms to guarantee individual freedom of expression and society's access to 'trustworthy information', and subsequently proposed regulation which would make platforms accountable for the content published by their users. In early May, a bill supported by the government sparked an outcry from big tech companies. The proposal was withdrawn before the vote due to the lack of political support in the House of Representatives.

The mainstream media were almost unanimous in condemning the 8 January attacks, labelling them as 'anti-democratic acts'; demonstrators were referred to as 'terrorists', 'vandals', and 'criminals'.

After the Bolsonaro years, when the media was routinely attacked by the president, relations have mostly gone back to normal. But the story is not yet finished – by the time Bolsonaro returned to Brazil on 30 March, there were six cases against him at the Supreme Court, 16 at the Superior Electoral Court, and an investigation into gifts he received from Saudi Arabia. He denies wrongdoing.

In 2022, the number of cases involving threats, harassment, or intimidation against journalists grew by 133%, according to the National Federation of Journalists. Despite this substantial rise, the same figures show actual verbal or physical attacks against journalists or news organisations falling from 430 cases in 2021 to 376 last year.

There has been a steep decline in the use of Facebook for news – down 12 points in two years to 35% this year – and it is now used for news less than Instagram. TikTok has seen more growth; the three best-selling dailies in the country (*O Globo*, *Folha de S. Paulo*, and *O Estado de S. Paulo*) have accounts, but still have a greater number of followers on Instagram and Twitter. The same is true for the free-to-air broadcasters. They are all interested in TikTok, but more interested in other networks where it is easier to promote existing content.

The fall in circulations for the ten best-selling newspapers has continued – a further 1.4% this year, as measured by Instituto Verificador de Comunicação. But this is not as bad as it has been in recent years, with sales perhaps being slightly buoyed by appetite for news in such a turbulent year. Digital subscriptions, which include PDF versions of the printed edition alongside website access, accounted for roughly seven out of every ten copies sold by these dailies in 2022. The daily *O Fluminense*, which was founded in 1878 and was the oldest newspaper in the state of Rio de Janeiro, suspended its circulation in March due to financial difficulties, but confounded expectations by returning to print publication.

Most advertising money still goes into free-to-air television, but spending on digital advertising continues to grow as now more than eight in ten Brazilians have access to the internet – up more than 5% in a year.

Brazil's biggest media conglomerate, Globo, which operates multiple newspaper, magazine, and online portals, launched a digital marketplace for selling programmatic advertising along its own content and also that of other media and entertainment companies.

With growing internet penetration, podcast listening rose slightly to 57%. Globo's O Assunto is by far the most popular journalistic podcast in Brazil, with a weekly average of more than 533,000 downloads in February, according to Triton Digital. During the presidential campaign in 2022, both Lula and Bolsonaro were interviewed on the Flow Podcast, an independent show modelled on the Joe Rogan Experience and hosted by interviewers who made their name by streaming content about gaming. It has more than 5 million YouTube subscribers.

Rodrigo Carro
Financial journalist and former Reuters Institute Journalist Fellow

[82] According to information compiled by two journalists' associations, Fenaj and Abraji.
[83] https://g1.globo.com/df/distrito-federal/noticia/2023/03/02/video-173-presos-por-atos-terroristas-de-8-de-janeiro-sao-liberados-em-brasilia.ghtml

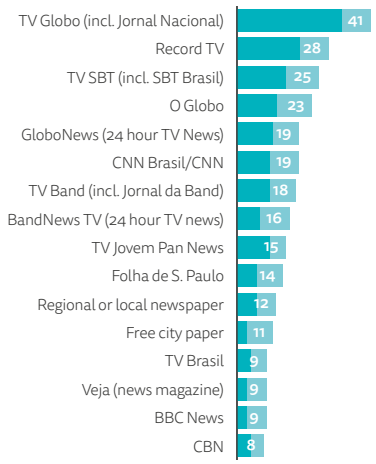
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

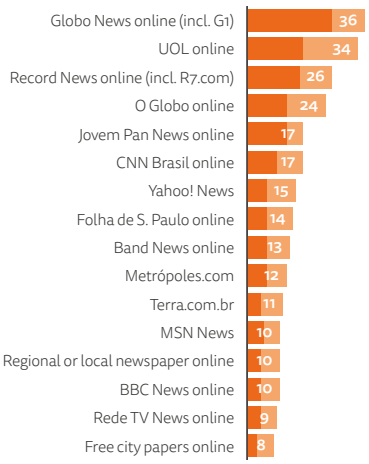
% Weekly usage

- 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



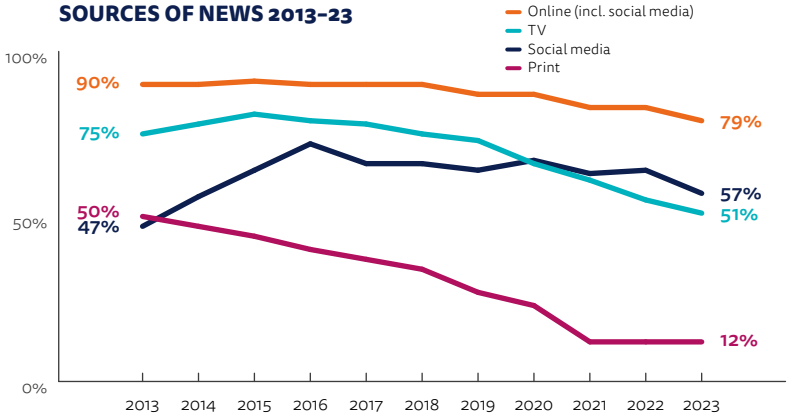
CHANGING MEDIA

Consumption of traditional sources of news such as television and print have declined significantly over the last decade, but online news access has also dipped, with levels of news avoidance still higher than many other countries in our survey.

20% PAY

pay for
ONLINE NEWS

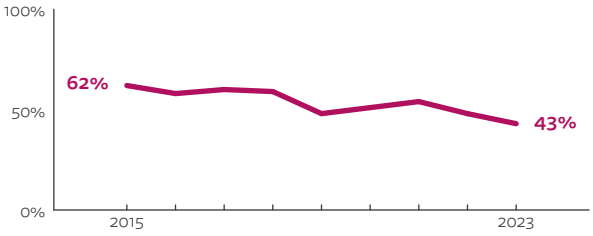
SOURCES OF NEWS 2013-23



TRUST

Overall trust in news continued downward in 2023, dipping from 48% one year earlier to 43%. That is consistent with the sharp decrease found just a few months after the also highly polarised presidential election won by Jair Bolsonaro in 2018. Criticism of journalists is high in Brazil, with nearly two-thirds of the respondents often hearing or seeing people criticising the press – in line with an environment of decaying trust and high polarisation.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

43%
OVERALL TRUST
=14/46 markets

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2023** Score: **58.67** **92**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Band News (incl. Jornal da Band)	60%	20%	20%
Folha de S. Paulo	53%	20%	27%
Globo (incl. TV Globo, GloboNews, G1)	54%	16%	31%
Metrópoles.com	49%	29%	23%
O Estado de S Paulo	53%	20%	26%
O Globo (newspaper)	54%	16%	30%
Record News (incl. Jornal da Record, R7)	60%	20%	20%
Rede TV	49%	26%	25%
Regional or local newspaper	58%	24%	18%
SBT News (incl. SBT Brasil)	61%	20%	19%
Terra.com.br	50%	27%	23%
UOL	55%	21%	24%
Valor Econômico	51%	28%	21%
Veja	51%	22%	27%
Yahoo! News	48%	29%	23%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

42%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	WhatsApp	43%	(+2)	75%
2	YouTube	41%	(-2)	73%
3	Instagram	39%	(+4)	63%
4	Facebook	35%	(-5)	59%
5	Twitter	14%	(+1)	24%
6	TikTok	14%	(+2)	29%

Population	38m
Internet penetration	94%

CANADA



Faced with rising costs and falling income, Canadian news media are restructuring and experimenting with new content and business models. The state's role is becoming more central, from proposals to force Google, Facebook, and others to compensate publishers, to the future of the national broadcaster.

It has been a tough year for Canadian news media. The combined effect of inflation and declining revenues led to hundreds of layoffs at the *National Post* publisher Postmedia, the largest newspaper group, as well as at television networks Groupe TVA (Québecor) and Global. Print editions were reduced or eliminated at several companies including Postmedia; Québecor's dailies in Montreal and Quebec City; the Atlantic Canadian company SaltWire Network; and *SingTao Daily*, Canada's largest Chinese-language newspaper.

But some publishers backed print: the *Winnipeg Free Press* invested $10m in new presses, and the *Georgia Straight*, recently acquired by Overstory, returned to free weekly distribution in Vancouver after a three-month hiatus.

Podcast initiatives were developed and promoted through media partnerships, such as a true crime series by Postmedia with Antica Productions; a *Toronto Star* entrepreneurship podcast made available on Air Canada flights; and podcasts jointly commissioned by the BBC and CBC/Radio-Canada. *Le Devoir* launched a daily news podcast with support from the Quebec Ministry of Culture and Communications.

Postmedia and Canadian-based online betting and casino platform BET99 created a sports betting hub as an affiliate channel to the media's online offerings. Torstar's collaboration with academic partners offers evidence-based content on issues related to ageing.

There were changes in local news groups, including cuts at Overstory, an innovative British Columbia-based start-up which acquired *The Coast* in Halifax in 2022. But Village Media, cited as a model for digital-first advertising-funded community news sites, expanded in Ontario. Hebdos Québec, a group of 75 independent publications, acquired Réseau Sélect, an advertising network serving French-language weeklies.

The *Eastern Door* newspaper in Kahnawake, a First Nations community in Quebec, launched a project to help preserve the Mohawk language Kanyen'kéha. *The Pipestone Flyer*, a local newspaper and news site in Central Alberta owned by Black Press, created a digital subscription programme. In New Brunswick, a former newspaper court reporter introduced the *Fredericton Independent*, a subscription-based newsletter.

The digital French-language daily La Presse created a new luxury publication, *Édition Limitée*, and merged its advertising, branded content, and data science operations into a single brand, Atelier La Presse. It reported a 9% increase in ad revenue.

Justin Trudeau's Liberal government proposed that Meta, Alphabet, and others should compensate publishers for linking to news stories, going further than the equivalent Australian News Bargaining Code which has reportedly led to US$134m per annum being paid to publishers by platforms.[84] The Canadian model would include broadcasters and smaller publishers, and would also impose tougher penalties for non-compliance. In response Meta has said that being compelled to pay for content that it has not itself posted is not sustainable, especially when news is not the main reason for people using its platforms. It says it will stop making news content available on any of its platforms in Canada if the act passes in its current form. Google has tested limiting the visibility of Canadian and international news to its users.

More publishers are trying to engage younger audiences, including on TikTok, even though many public bodies are banning the application due to security concerns. At the time of writing, however, the bans have not stopped the federal government from advertising on the platform.

The dismissal of Lisa LaFlamme, the flagship anchor for Bell Media's CTV, the leading TV network, was widely criticised. It was apparently in a disagreement about budgets, but was hedged with debate about workplace culture, managerial interference, and digitalisation.

The future of public broadcaster CBC/Radio-Canada became more polarised following the election of a new leader of the Conservative Party of Canada, Pierre Poilievre. He has referred to the broadcaster as 'Trudeau's $1.2bn propaganda arm' and promises to defund it if he wins the next general election, to be held before October 2025. Well over half the broadcaster's income comes from federal funding, with most of the rest coming from advertising, subscriptions, and branded content. The broadcaster is defending its position. It plans to become 100% digital, but only when there is 'broadband ubiquity' – a challenge in such a large country.

Colette Brin *Director,* and **Sébastien Charlton** *Coordinator, Centre d'études sur les médias, Université Laval*

[84] https://jninstitute.org/wp-content/uploads/2022/05/Rod-Sims_News-Bargaining-Code_2022.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

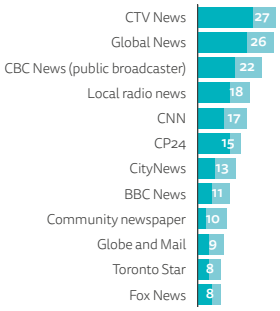
11% pay for **ONLINE NEWS**

English 11% | French 11%

33% listen to **PODCASTS** in the last month

English 36% | French 26%

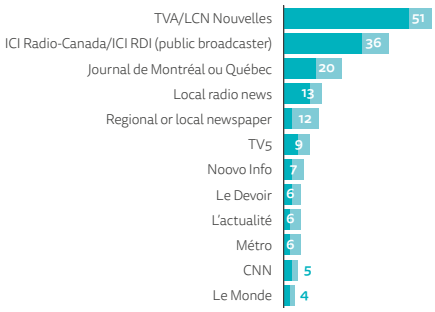
TV, RADIO AND PRINT (ENGLISH SPEAKING)



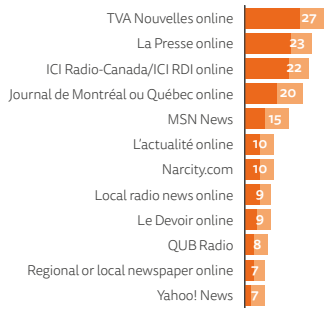
ONLINE (ENGLISH SPEAKING)



TV, RADIO AND PRINT (FRENCH SPEAKING)



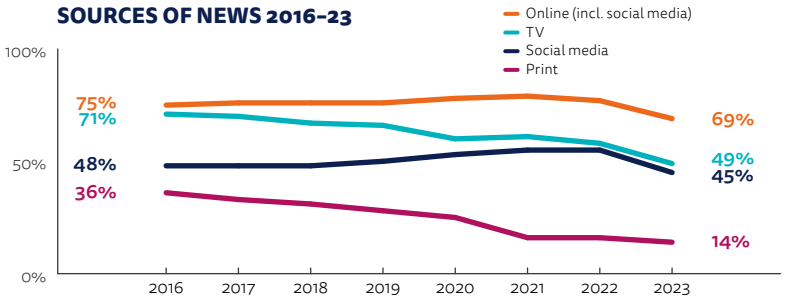
ONLINE (FRENCH SPEAKING)



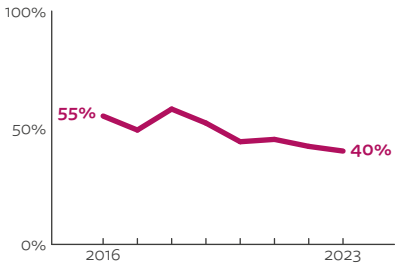
TRUST

Trust in news overall is falling among English-speaking Canadians, placing them in the lower end of surveyed markets. Attitudes towards publicly funded news services are also more negative than in past studies, especially in the West. However, Francophones maintain more positive views, with a slight bump this year for trust in news generally.

SOURCES OF NEWS 2016–23



TRUST IN NEWS 2016–23



40%
=20/46 markets

English 37%
French 49%

Proportion that trusts 'most news most of the time'

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	29%	(-11)	62%
2	YouTube	25%	(-7)	62%
3	Twitter	11%	(-)	19%
4	Facebook Messenger	11%	(-7)	46%
5	Instagram	10%	(-2)	35%
6	TikTok	6%	(-2)	19%

BRAND TRUST SCORES

Only the below brands were included in the survey so it should not be treated as a list of the most or least trusted brands as it is not exhaustive.

ENGLISH

Brand	Trust	Neither	Don't Trust
BBC News	55%	29%	17%
CBC News	58%	21%	21%
CityNews	52%	31%	17%
CNN	49%	26%	25%
CP24	48%	34%	19%
CTV News	59%	24%	17%
Fox News	30%	26%	44%
Global News	58%	25%	17%
Globe and Mail	53%	30%	17%
MSN News	39%	35%	26%
National Post	48%	31%	20%
New York Times	47%	32%	21%
Regional or local newspaper	60%	27%	14%
Toronto Star	45%	33%	22%
Yahoo! News	32%	40%	28%

FRENCH

Brand	Trust	Neither	Don't Trust
CTV News	51%	34%	15%
ICI Radio-Canada/ICI RDI	72%	18%	10%
Journal de Montréal ou Québec	60%	21%	19%
L'actualité	61%	28%	11%
La Presse	66%	23%	11%
La Presse Canadienne	61%	28%	11%
Le Devoir	63%	26%	11%
Les coops de l'information (6 regional newspapers in Quebec)	54%	34%	13%
Métro	44%	41%	15%
MSN Actualités	44%	36%	20%
Narcity.com	28%	39%	33%
Noovo Info	52%	33%	14%
Regional or local radio	62%	27%	11%
TV5	55%	32%	12%
TVA Nouvelles/LCN	67%	16%	16%

Q6_brand 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'. Details: 6-10 coded as 'Trust', 5 coded as 'Neither', 0-4 coded as 'Don't Trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **83.53** **15**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

Population	19m
Internet penetration	97%

CHILE



Chile's media is dominated by a number of private national and local broadcasters, with two commercial groups owning the bulk of print titles. The news media have been tested by a series of dramatic political events since popular protests in 2019.

A new constitution, which had been written in a complex process designed to build consensus in Chile, was strongly rejected in a referendum in September 2022, meaning the whole drafting process began again. In recent years, politics and news coverage have become central features of the media's output, but when the new constitution was rejected, discussion moved on to other subjects such as debating crime and law enforcement news.

It is possible that, following a period which has seen riots, COVID-19, a contentious presidential election, as well as several other elections, news consumers are now experiencing a certain amount of news fatigue. Four in ten (40%) of respondents to our Digital News Report survey say they sometimes or often avoid the news, slightly up on last year. National politics was one of the news subjects mentioned as most likely to be avoided, according to survey respondents.

More widely, the role of journalism and the performance of individual journalists has come under scrutiny during this time, especially on networks like Twitter, even if the level of debate is not quite at the peak seen during the referendum. One high-profile example was during the coverage of wildfires which broke out in central and southern Chile before Christmas, with major loss of life and homes. TV networks covered the fires extensively, and some sent news anchors to the affected areas. Audience members accused some reporters of insensitivity, but praised others for not conducting interviews in moments of vulnerability or turning off cameras altogether.

Clips of what the audience saw as good or bad practice went viral on social media as Chileans adopted 'second screen' news consumption – something news organisations themselves encouraged by exploring news formats on TikTok and live newscasts on YouTube. TikTok has been the fastest growing social platform in the last year and is used by almost four in ten (39%) of our sample, with 18% saying they have used the network for news in the last week.

In spite of efforts by TV stations to engage with the news seriously, the economics of the news media remains precarious, and job losses are common. One of the most visible cases was that of La Red, a television station which was included in this report for the first time last year as it focused more on serious news coverage rather than an agenda of entertainment. After months of not paying salaries, La Red went bankrupt, changed its CEO, and switched its entire programming away from live political news to reruns of old TV series and films. It is now almost a different station and its trust figures suffered as a result.

Chile's only free-to-air public television channel, Televisión Nacional de Chile (TVN), is also continuing to struggle. Private television stations like Mega and Chilevisión (CHV) continue to be more popular, and Televisión Nacional has had to resort to renting some of its facilities commercially to audiovisual production companies. Television brands remain the most popular sources for online news, but it is the significance of audiovisual material including hybrid formats such as live-streamed radio shows or newspapers emphasising video clips which is most evident throughout the media industry.

Chile has two big newspapers, *La Tercera*, owned by conglomerate Copesa, and *El Mercurio*, the nation's paper of record. Both newspapers currently have paywalls in place, but *El Mercurio* also runs a separate online portal called Emol which provides free access supported by advertisements.

The magazine *The Clinic* appears to have become an example of the audience's changing tastes away from politics. Traditionally considered a partly satirical magazine, it was acquired by a company which intends to seek younger audiences with entertainment and cultural stories.

One of the debates that arose during recent political events was the need for a law to regulate the media. Proponents argued that new legislation was needed to guarantee pluralism and combat concentrated ownership, while opponents worried about potential risks to freedom of expression and blocking the entry of new commercial actors. This discussion will be reopened. Bills have also been proposed to address the danger of fake news. However, there has been little progress due to the lack of consensus on how to define misinformation or who should be responsible for determining the truth.

Francisco J. Fernández
Pontificia Universidad Católica de Chile
Enrique Núñez-Mussa
Michigan State University

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

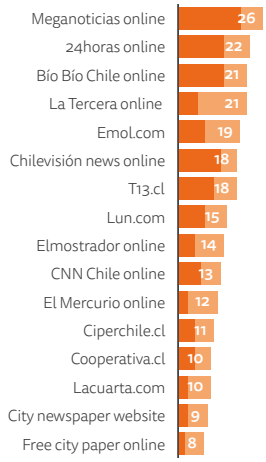
% Weekly usage

- 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

TV, RADIO AND PRINT



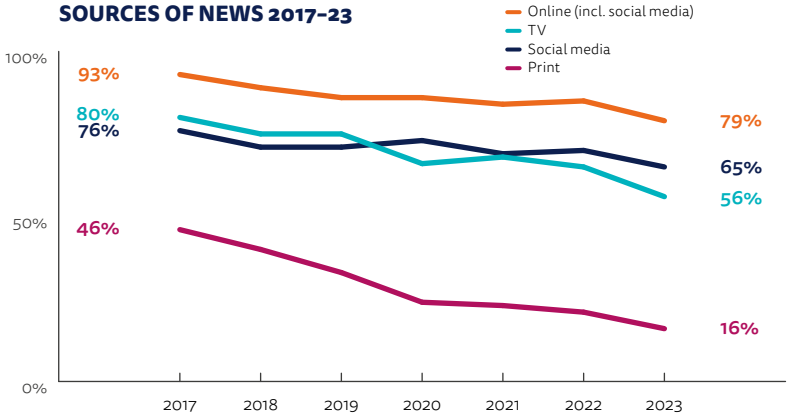
ONLINE



CHANGING MEDIA

Traditional sources such as television and print have both declined significantly over the last seven years. But online and social media are also declining, suggesting news fatigue may be setting in to some extent at least.

SOURCES OF NEWS 2017–23

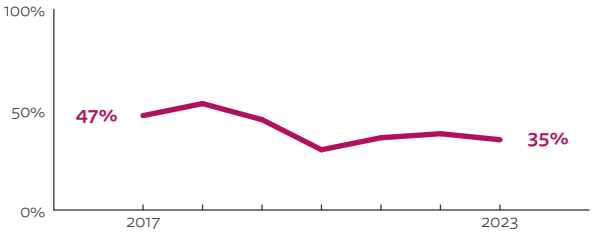


11% pay for **ONLINE NEWS**

TRUST

Trust in the news continues to be low (35%) as in previous years, with a 3pp fall overall. After an economic bankruptcy and a significant reduction in personnel, trust in TV station La Red decreased. At the same time, trust in the conservative newspaper *El Mercurio* increased, which may reflect a new political scenario in the country following the rejection of the draft for a new constitution last year.

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

35% **OVERALL TRUST =28/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **60.09** **83**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
24 Horas (TVN)	52%	24%	24%
Bío Bío Chile	63%	20%	17%
Chilevisión Noticias (CHV)	55%	23%	22%
CNN Chile	61%	22%	18%
Cooperativa	61%	23%	16%
El Mercurio	49%	22%	29%
El Mostrador	45%	32%	24%
Emol.com	45%	29%	26%
Free city newspapers	45%	32%	23%
La Red	45%	29%	26%
La Tercera	48%	26%	26%
LUN	39%	31%	30%
Meganoticias (Mega)	54%	22%	25%
Regional or local newspaper	54%	27%	18%
Tele 13 (Canal 13)	50%	24%	26%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

46% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	50%	(-3)	71%
2	Instagram	34%	(-2)	60%
3	WhatsApp	34%	(+3)	75%
4	YouTube	31%	(+3)	69%
5	TikTok	18%	(+9)	39%
6	Twitter	16%	(-3)	26%

Population	**52m**
Internet penetration	**83%**

COLOMBIA



Alarm bells are ringing for freedom of expression after a sharp deterioration in relations between the media and the government, which is being led for the first time by a leftist president. Frequent attacks on journalists and publications may, however, have had the effect of increasing trust with some groups, by reminding them of the importance of watchdog journalism.

Gustavo Petro – the first left-wing president in Colombia's history, who came to power in 2022 – has repeatedly attacked the media and journalists, sending or sharing dozens of tweets which criticise them for the way they cover his presidency. He has issued corrections and made accusations of lack of transparency, targeting newspapers including *El Colombiano*, *El País*, and *El Tiempo*, radio stations, online magazines, and native digital media. His lines of attack are diverse – he has criticised or mocked well-known journalists on subjects including peace dialogues with illegal groups, energy policy, health reform, and even allegations of sexual harassment.

Colombia is one of the countries where attacks on journalists have a troubled context. For years reporters faced intimidation and violence from rebels and paramilitaries. The Foundation for the Freedom of the Press warned of the possible consequences of attacks by the president for the independence of journalism, recommending that he 'refrain from publishing any message that citizens may interpret as permissive towards violence against the press'. In 2022, 218 threats to the press were reported, the highest number in the past 15 years. Two journalists were murdered.

The president, whose 'Total Peace' agenda seeks to end endemic corruption and fighting between factions, has run into scandal following media investigations led by the influential *Semana* magazine. It is alleged that his son, Nicolás Petro, received money from two former drug traffickers for his father's campaign. The president's brother, Juan Fernando Petro Urrego, is facing accusations that he had connections with groups which allegedly took government money which was intended to persuade small militia groups to turn themselves in to the justice system. Investigations are ongoing.

The combination of attacks and scandals has gone some way to unite the media in seeing its role as being a watchdog towards the government. This increasing confidence among publications may be one of the reasons that both traditional and digital-native media brands have seen their trust scores increase.

Some publications have taken a more openly partisan position towards the new government, especially those backed by corporations and political factions that worry about a left-wing president. Billionaire banker Jaime Gilinski, via his holding company, purchased regional newspaper *El País*, based in Cali, which has been at the centre of protests which paralysed the south of the country. If the newspaper becomes more anti-government in its tone, it could signal a trend towards more polarised media. Other powerful conglomerates may be eyeing up local media, which have been weakened after the pandemic.

Despite the tumultuous political landscape, overall consumption figures online and offline fell compared with last year and the pandemic peaks. The paywalled website, ElTiempo.com, one of the two national newspapers, still leads weekly online news use (29%), with Noticias.CaracolTV.com, the digital arm of private national TV news network Caracol TV, is in second position (23%). One factor helping explain falling online news consumption is the ongoing shrinking of Facebook as a news platform. Fewer people are using it, thanks in part to the rise of platforms like TikTok, which is popular with younger users, but not such a powerful driver of traffic to publisher websites.

But people actively avoiding the news (41%) and polarisation will also be at play. Respondents say they are avoiding particular topics (36%) and checking news sources less frequently (25%). Among those who actively avoid news topics, four in ten say they are avoiding national politics; three in ten are avoiding stories about crime and the war in Ukraine.

Big free-to-air TV news channels are still hugely influential in Colombia. Caracol News TV, part of privately owned Grupo Valorem, and RCN News TV, part of Ardila Lülle Organisation, are the biggest offline news sources but both saw falls.

High inflation, high unemployment, and tough economic conditions have led to many small businesses closing, but they seem not to have been translated yet into a dent in online news subscriptions, which are small but growing: 14% of respondents say they paid for a subscription, 2 percentage points higher than last year. *El Tiempo* and *El Espectador* are using AI and other automatic technologies to find successful ways to convert users into subscribers.

Víctor García-Perdomo
Full Professor and Director, Doctoral Program in Communication, Communication School, Universidad de La Sabana, Bogotá, Colombia

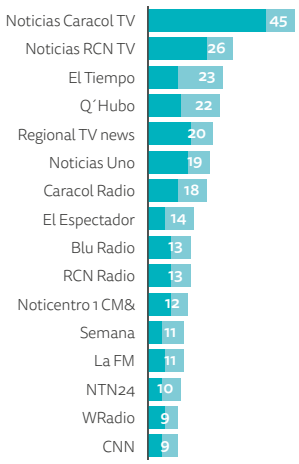
WEEKLY REACH OFFLINE AND ONLINE

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

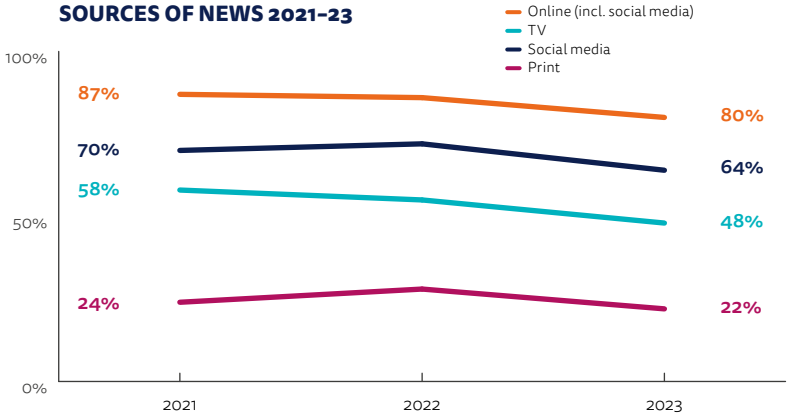


CHANGING MEDIA

Colombians in our more urban-based sample get their news more frequently online (including from social media) than from TV or print, which are both losing reach. TikTok saw a big rise for the second year in a row, part of a wider trend with younger people across South America.

14% pay for **ONLINE NEWS**

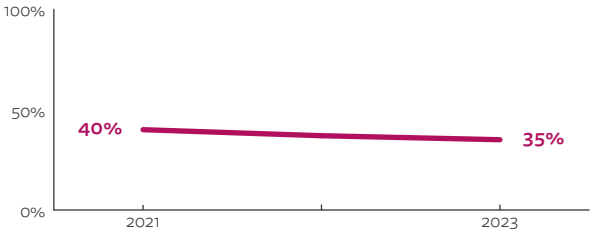
SOURCES OF NEWS 2021–23



TRUST

Trust in the news (35%) remains low by global standards, possibly related to concerns about both political polarisation and the spread of misinformation. Some media outlets have increased their trust scores in the last year, perhaps a reward for persistence in the face of attacks by the president. NoticiasUno (71%) and NotiCentro 1 CM& (63%) are among brands to have seen biggest increases this year.

OVERALL TRUST SCORE 2021–23



Proportion that trusts 'most news most of the time'

35% **OVERALL TRUST =28/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **45.23** **139**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
El Espectator	59%	22%	19%
El Tiempo	60%	21%	19%
Las2Orillas	46%	29%	25%
NotiCentro 1 CM&	63%	22%	16%
Noticias Caracol Radio	53%	21%	26%
Noticias Caracol TV	52%	19%	29%
Noticias RCN Radio	48%	21%	31%
Noticias RCN Televisión	49%	19%	32%
Noticias Uno	71%	17%	12%
Pulzo	47%	30%	23%
Q´Hubo	48%	27%	26%
Regional newspapers	56%	25%	18%
Regional TV news	65%	22%	13%
Semana	48%	20%	32%
Señal Colombia	65%	21%	13%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

48% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	58%	(-7)	75%
2	WhatsApp	41%	(+1)	77%
3	YouTube	36%	(+2)	71%
4	Instagram	29%	(-)	55%
5	TikTok	20%	(+10)	40%
6	Twitter	18%	(-)	28%

Population	**132m**
Internet penetration	**67%**

MEXICO



Mexican news media still face daily attacks from a populist president. Innovation and mergers among big players have brought significant new challenges in the market, while competition from US-based media increases choices for consumers.

The relationship between the media and the president is not getting easier. Daily verbal attacks on the news industry from President Andres Manuel López Obrador (AMLO) have increased in the past year as he has continued to use his morning addresses, known as the *mañaneras*, to pursue his agenda. Notable journalists including Carmen Aristegui, a host on CNN en español, war correspondent and radio host Carlos Loret de Mola, and commentator Victor Trujillo have all been targeted by the president, as have numerous domestic and international outlets. A letter signed by 180 Mexican journalists in December 2022 demanded an end to the harassment. Three journalists were murdered in Mexico in the first three months of the year.

Human rights organisation Article 19 says that the Mexican government has developed a 'strategy of disinformation' while claiming to have created greater transparency and accountability. This has happened, it says, while legal access to public sources of information has, in effect, been curtailed. It also claims that about a quarter (26.5%) of the public information provided by government authorities was false.[85]

Legal challenges from journalists have been numerous, including one from Aristegui and one from political scientist and journalist Denise Dresser, who claimed her freedom of expression and right to reply had been violated.

Meanwhile Google's Mexican division is appealing against a decision which saw it ordered to pay US$250m in punitive damages following the publication of an article on its Blogger platform which made defamatory allegations against a lawyer, Ulrich Richter Morales. He said that Google should not have allowed the offending content to remain accessible.

Despite fears of recession, the Mexican economy has recovered well after COVID-19. Significant growth is forecast for the telecommunications sector, and there is optimism too for entertainment and media,[86] despite announcements of newsroom job cuts.

Football news site SoyFutbol and news site La Silla Rota, part of the El Universal newspaper group, historically the most significant player in the Mexican news market, have seen the highest audience growth this year according to figures from *El Economista* and Comscore.[87] Commercial television is still dominant in Mexico, but is increasingly threatened by internet-based streaming platforms. All the global players are active in Mexico along with home-grown ventures such as Claro Video, part of Carlos Slim's América Móvil, which also owns digital news brand UnoTV. Uno is one of three digital-native outlets with the highest traffic, along with Medio Tiempo and SDP News from parent company Grupo Televisa, the biggest player in commercial TV.

The merger of Grupo Televisa with US-based Spanish-language network Univision, completed this year, has led to the creation of TelevisaUnivision and the development of another streaming platform, ViX, which offers movies, soap operas, and sport, alongside news. It says it is now the largest Spanish-language streaming service in the world and has more than 25 million monthly active users on its ad-funded tier alone.

Internet penetration looks set to increase further, as the start of the development of a 5G network begins, adding to well-established fixed and mobile broadband services. This should help access for regions where it is difficult to install fixed broadband, such as rural areas of southern Mexico.

Digital-native operator Latinus, which launched in 2020 with Carlos Loret de Mola, one of the president's favourite targets, as its frontman, runs investigations into corruption and organised crime. Though it was created to appeal to Latin American audiences within the US, from where it is produced, it has seen success in appealing to a young engaged audience in Mexico and in January this year began broadcasting live. One of the president's other targets, Victor Trujillo, took a character he plays called Brozo, a green-haired, foul-mouthed clown who rants about the news, onto the Latinus network.

Latinus has grown too on TikTok where it has more than 3.4 million followers, including for videos of Brozo. Our data show that TikTok has grown substantially in Mexico this year, and many of the news firms are trying to find ways to engage younger audiences there. The president, as yet, is not joining them.

María Elena Gutiérrez-Rentería
Universidad Panamericana

[85] Article 19, '(Des) información oficial y comunicación social', 14 Mar. 2023. https://articulo19.org/desinformacion-oficial-y-comunicacion-social/
[86] PWC, *Global Entertainment and Media Outlook 2022–2026 Capítulo México*. 2022. https://www.pwc.com/mx/es/industrias/tmt/gemo.html
[87] I. Marchant, 'Sólo 4 medios nativos registran crecimiento de audiencia en 2022', Comscore, 8 July 2022. https://www.eleconomista.com.mx/tecnologia/Solo-4-medios-nativos-registran-crecimiento-de-audiencia-en-2022-20220708-0026.html

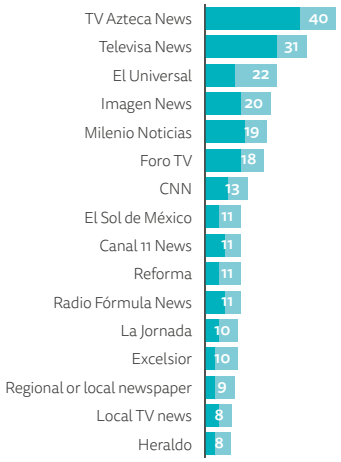
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

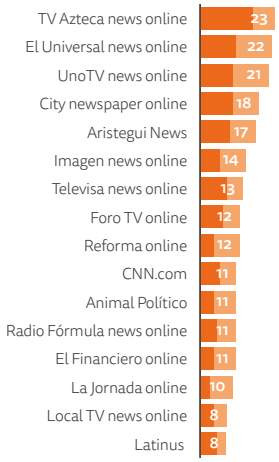
% Weekly usage

- 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



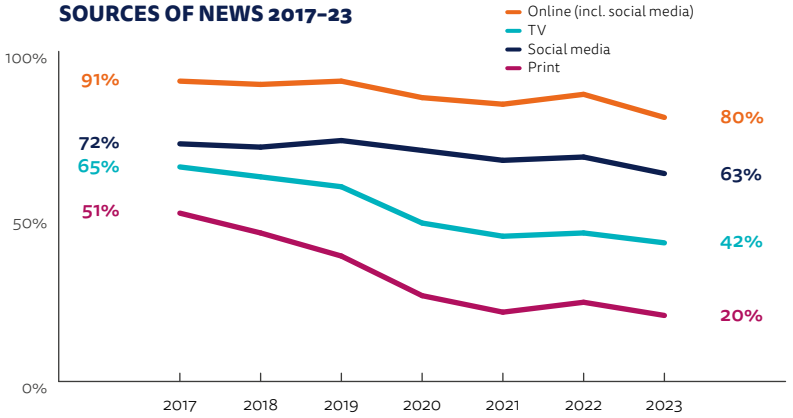
ONLINE



CHANGING MEDIA

TV and print have become gradually less important over time for our online sample, with social media widely used across age groups. Mexicans are heavy users of social media, with YouTube and TikTok growing fastest for news.

SOURCES OF NEWS 2017–23

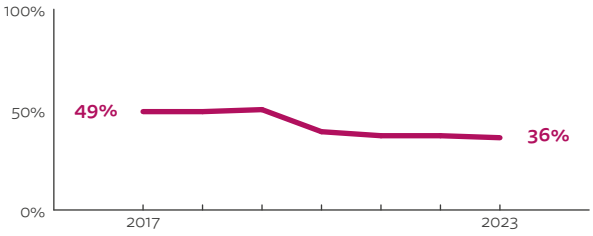


16% pay for **ONLINE NEWS**

TRUST

The president's repeated attacks against news companies may have impacted the steady decline in trust in the news over the last few years from 50% in 2019 to 36% today. Most of the top news brands have seen further declines in their individual trust scores this year, with CNN outperforming local brands.

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

36% **OVERALL TRUST 27/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **47.98** **128**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Aristegui News	59%	21%	20%
Canal 22	59%	27%	14%
CNN	68%	19%	13%
El Economista	59%	25%	16%
El Financiero	60%	25%	15%
El Universal	62%	22%	16%
Imagen News	62%	22%	16%
Latinus	47%	27%	25%
Local newspaper	57%	26%	17%
Milenio News	62%	22%	16%
Noticieros Televisa	49%	21%	30%
Radio Fórmula News	60%	23%	17%
Reforma	58%	23%	20%
TV Azteca News	56%	21%	23%
UnoTV	58%	27%	15%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

48% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	56%	(-5)	77%
2	YouTube	39%	(+2)	75%
3	WhatsApp	30%	(-)	77%
4	TikTok	15%	(+5)	42%
5	Twitter	15%	(-1)	30%
6	Instagram	14%	(-)	45%

Population	**34m**
Internet penetration	**87%**

PERU



Political instability, protests, and polarisation are the greatest threats to freedom of the press and journalists in a year that ended with a failed coup by former President Pedro Castillo.

It feels like the turmoil in Peru never stops. A year after an extremely close election, the opposition-controlled Congress tried repeatedly to oust the new president, Pedro Castillo, and his government. They were not short of opportunities – the government was inexperienced, largely inept, and rife with corruption.[88]

In December, as Congress was mounting its third impeachment attempt, President Castillo responded by attempting a 'self-coup'. In a televised speech, echoing the way Alberto Fujimori dissolved Congress in 1992, Castillo said he was going to establish an emergency government, reorganise the judiciary, and call for a new constitution. However, where Fujimori's self-coup had led to a decade-long dictatorship, Castillo's – without the support of the military – fell flat. Congress ousted him that same afternoon, and he was imprisoned. The vice-president, Dina Ercilia Boluarte Zegarra, was duly sworn in by Congress as the new president, the first woman to hold the position in Peru's 200 years of republican governments.

Although the transition was orderly and followed constitutional processes, its abruptness led Castillo supporters and critics of Congress to take to the streets in protest, demanding a general election. At the time of writing, 59 people had died as a result of police or army actions. More than a hundred police were injured. Several independent investigations, including some by foreign press, found excessive force had been used by the police and military. One of the most useful tools in these investigations is the availability of videos of police and army actions, filmed by protesters on their phones and uploaded or streamed to social media.

The Economist downgraded Peru from a 'flawed democracy' to a 'hybrid (authoritarian) regime' in its 2022 Democracy Index,[89] citing an 'increasingly unstable political environment'.

The mainstream press, which is mostly opposed to Castillo's government, supported Boluarte's administration, which moved away from the left and aligned itself with conservative parties, seeking to protect markets and preserve the economic model which has been the status quo in the country for the past two decades.

Peru was very badly hit by COVID-19, and the slowness of the economic recovery is worrying for media companies. Advertising spend reached 0.23% of GDP, far below the levels of 2017 (0.31%). Broadcast TV still takes the largest share but the trend is steadily in decline (45.8% in 2018 vs. 38.3% in 2022).[90]

There are other reasons to worry – not least the overall decline in news audiences. All the most important sources of news (online, TV, print, and social media) showed declines of between 4% and 7%. Two newspapers which lost more than most were influential political tabloid *Perú21* and the country's oldest newspaper *El Comercio*, which lost 4% and 5% in print readership and 5% and 7% in online readership respectively. The trend might explain why El Comercio Group – which owns 80% of print media in Peru – sold *Perú21* to its news director, Cecilia Valenzuela Valencia.

Digitally native publications which had been gaining ground in the past few years seemed to become stagnant or even lose audience. Two exceptions are worth mentioning: Willax TV and Exitosa maintained their audiences year-on-year (20%). They come from the opposite extreme ends of the political spectrum: Willax is a right-wing TV channel which was accused of broadcasting fake news over the post-self-coup riots; Exitosa, a radio and TV operation, is known for its left-wing populism.

Online newspaper Infobae.com, one of the world's most visited Spanish-language news sites, formalised its presence in Peru by joining the Peruvian Press Council. It enters our study for the first time this year with 8% of participants saying they visited the site for news.

The year 2022 was also the 'worst of the century' for Peruvian journalists, according to the National Association of Journalists' annual report,[91] which reported a total of 303 incidents involving journalists. The most common were threats/harassment (36%) and verbal/physical attacks (34%), but also growing were the use of lawsuits to intimidate journalists (9%) and blocks on accessing public information (9%). Digital independent journalists bore the brunt of the attacks (43%) followed by TV journalists (32%). This is not surprising – 71% of participants in our study say that, very or quite often, they 'see or hear people criticising journalists'.

Lourdes M. Cueva Chacón
San Diego State University

[88] https://www.npr.org/2022/12/09/1141855115/from-president-to-prisoner-the-rapid-descent-of-perus-pedro-castillo
[89] *The Economist*. https://www.eiu.com/n/campaigns/democracy-index-2022/
[90] CPI. https://cpi.pe/images/upload/paginaweb/archivo/26/MARKET%20REPORT_2023_2-1.pdf
[91] ANP. https://anp.org.pe/anp-registro-303-ataques-a-la-libertad-de-prensa-durante-el-ano-2022/

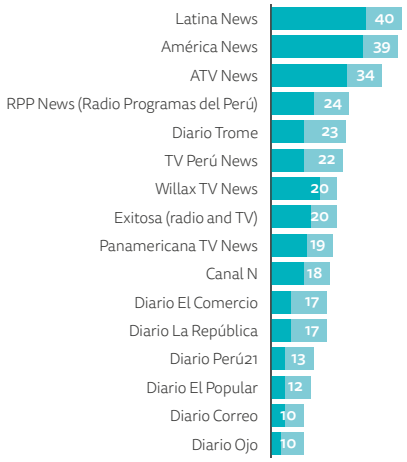
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

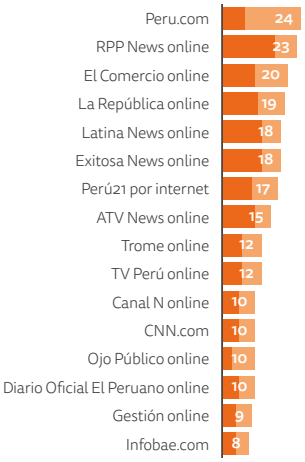
% Weekly usage

- 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

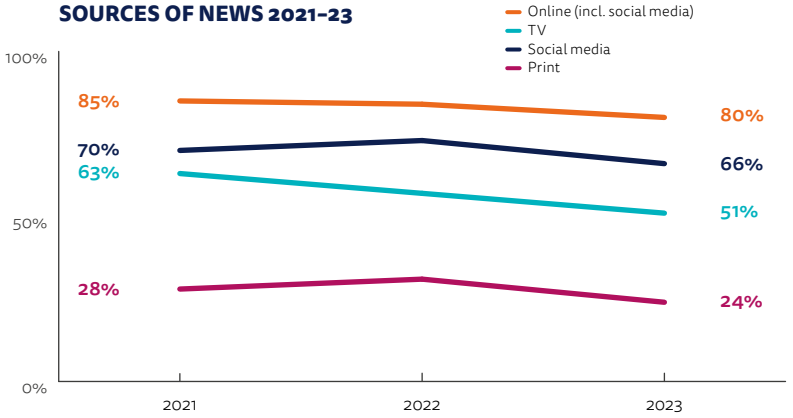


CHANGING MEDIA

There is an overall decline in news use. This includes traditional and online media as well as all sources of news including social media. TikTok is the only social media platform growing considerably as a source of news among Peruvians.

13% pay for **ONLINE NEWS**

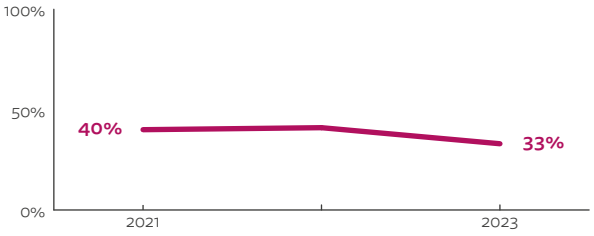
SOURCES OF NEWS 2021–23



TRUST

Overall trust in news (33%) has declined across the board, as has trust in individual brands, with state-run media consistently registering some of the biggest losses. The percentage of people who say they distrust the media is higher than in many other countries, suggesting a high degree of media polarisation.

OVERALL TRUST SCORE 2021–23



Proportion that trusts 'most news most of the time'

33%
OVERALL TRUST
=33/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **52.74** **110**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
América TV News	37%	22%	41%
Canal N	44%	23%	33%
Correo	37%	28%	35%
El Comercio	45%	23%	32%
El Peruano	51%	24%	25%
Exitosa	43%	27%	30%
Gestión	43%	25%	32%
La República	43%	26%	31%
Latina News	39%	24%	36%
Local newspaper, radio or TV	39%	32%	29%
Ojo Público	30%	28%	42%
Panamericana News	42%	25%	34%
RPP News	53%	21%	26%
Trome	30%	23%	47%
TVPerú Noticias	45%	27%	28%

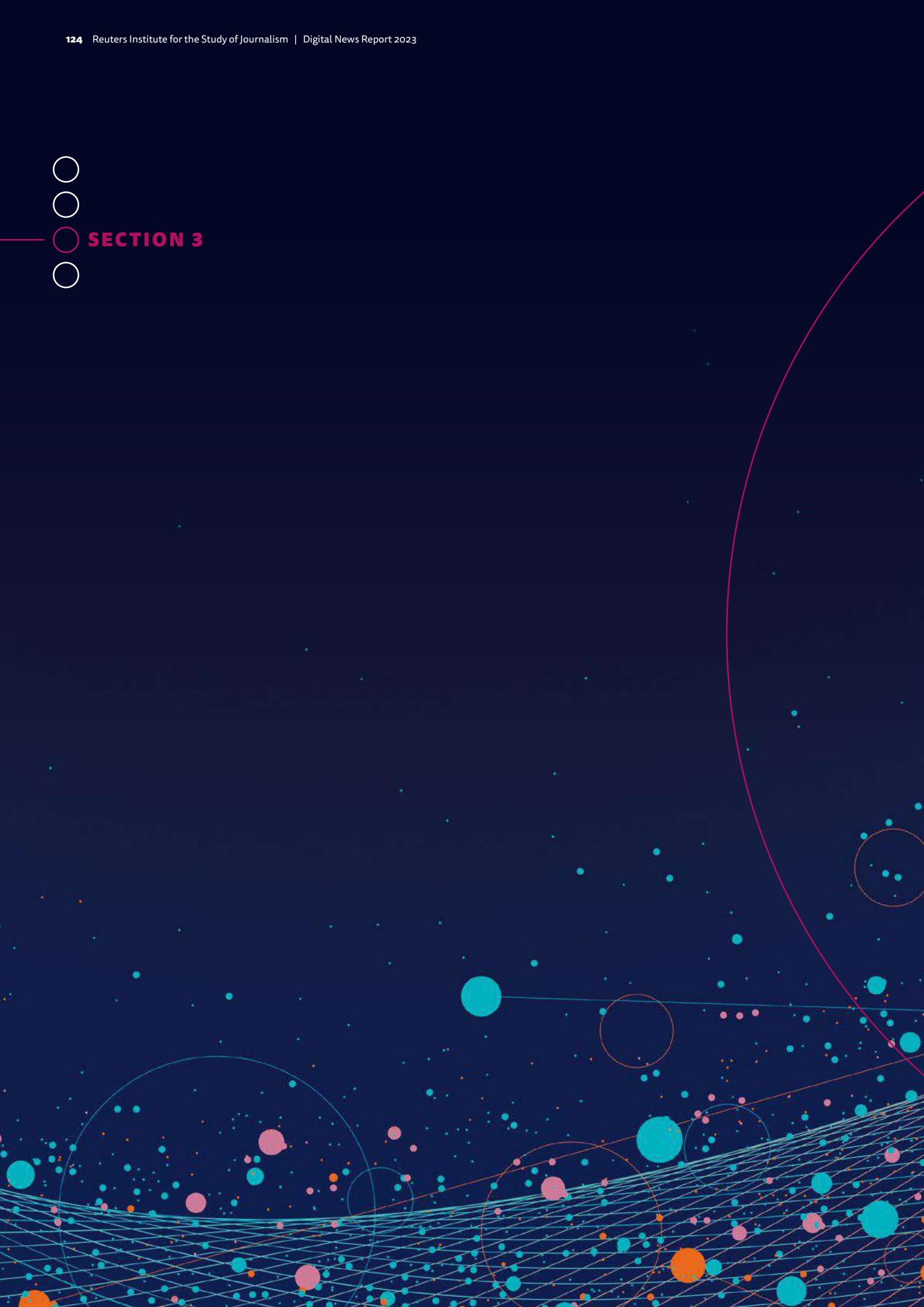
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53%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	66%	(-1)	81%
2	YouTube	39%	(-)	69%
3	WhatsApp	36%	(+2)	70%
4	TikTok	30%	(+14)	48%
5	Instagram	22%	(-)	45%
6	Twitter	14%	(-1)	22%

SECTION 3



SECTION 3

Analysis by Country and Market
Asia-Pacific

ASIA-PACIFIC		
3.33	Australia	126
3.34	Hong Kong	128
3.35	India	130
3.36	Indonesia	132
3.37	Japan	134
3.38	Malaysia	136
3.39	Philippines	138
3.40	Singapore	140
3.41	South Korea	142
3.42	Taiwan	144
3.43	Thailand	146

Population	**26m**
Internet penetration	**90%**

AUSTRALIA



After years of cuts, contractions, and closures, Australian news businesses received millions in financial relief through commercial deals struck with Google and Meta in response to Australia's News Media Bargaining Code. However, it hasn't been a cure-all. The advertising market has cooled, and News Corp Australia plans to lay off hundreds of staff. In uncertain times, the continued rise in paying for online news provides a beacon of hope.

The past 12 months have been something of a rollercoaster ride for media in Australia. There was some early optimism with Nine Entertainment Co. and News Corp Australia both posting improved revenues in June 2022. A review of the News Media Bargaining Code[92] introduced in 2021 found that 30 commercial agreements had been secured between the major platforms and Australian news organisations. Several news organisations increased their staff, with Guardian Australia hiring 50 new journalists. But it is clear the benefits of the Code have been unevenly felt. Small and independent players in the industry, particularly in the regions, have struggled to negotiate deals with Meta and Google. [93]

There are also concerns that, once the first round of agreements expire, Meta and Google may be reluctant to keep the money flowing.

Falling ad revenue has hit the platforms hard, with Meta announcing tens of thousands of redundancies globally. Many of those cuts have come from its Facebook Journalism Project and other journalism initiatives, suggesting a pivot away from news as part of its core interests. Google has dropped over 10,000 staff in the US, signalling it may be doing some belt-tightening in Australia as well.

News Corp chief executive Robert Thomson announced in March that rising interest rates and plummeting ad spending meant the company would need to lay off one in 20 of its staff globally. Given that News Corp operates more than half the Australian print market this could have an outsized effect on Australian journalism.

May 2022 saw a change in government. The incoming Labor administration has reversed cuts to the public Australian Broadcasting Corporation and moved it from a three-year to five-year funding cycle. It is also set to hand out $4 million in grants as part of a News Media Assistance Program, signalling intent to sustain and develop public interest journalism, particularly in the regions. However, piecemeal approaches do little to address the underlying market issues in Australia.

According to data from the Public Interest Journalism Initiative[94] around 50 regional news outlets closed, merged, or reduced their services in 2022, most of these being newspapers. This was only partly offset by the opening of 26 new outlets and ten new ABC rural newsrooms.

Consumers are continuing to drift away from traditional media such as TV, print, and radio, and towards streaming video-on-demand services, online news subscriptions, and social media. Major players such as Foxtel have been able to offset losses from their broadcast products with steady growth in subscription revenue from streaming services like Kayo and Binge. Nine Entertainment Co.'s streaming service Stan also controls a sizeable segment of the market now. Despite posting heavy losses, News Corp Australia reported more than 1 million subscribers to online news in 2022.

This year's data show that the 5 percentage point increase in paying for online news we saw last year was not a fluke. The proportion paying has increased again, up to 22% from only 13% two years ago. Holding on to those subscribers is the challenge. Trust in news in Australia remains at pre-pandemic levels, news avoidance continues to be high, and concern about online misinformation is rising.

The voluntary Code of Practice on Disinformation and Misinformation promises a framework to help organisations combat false and misleading information online. A review of the Code[95] in late 2022 made significant changes, including changing the 'harm' threshold related to dis- and misinformation from 'serious and imminent' to 'serious and credible'. But even with the Code, the government is set to grant the Australian Communications and Media Authority new powers to compel platforms to assist it. This may include an additional mandatory and enforceable industry code of conduct.

Trust may yet be the key to holding onto news subscribers, but in such unstable times organisations will need to move fast to capitalise on their gains in 2023.

Kieran McGuinness
News and Media Research Centre, University of Canberra

[92] Department of the Treasury, *News Media and Digital Platforms Mandatory Bargaining Code; The Code's First Year of Operation.* Canberra, 2022. https://treasury.gov.au/publication/p2022-343549
[93] https://www.poynter.org/business-work/2022/australias-news-media-bargaining-code-pries-140-million-from-google-and-facebook/
[94] Public Interest Journalism Initiative, Australian Newsroom Mapping Project, 2023. https://newsindex.piji.com.au/news-changes/
[95] DIGI, 2022 Code Review. https://digi.org.au/disinformation-code/code-review/

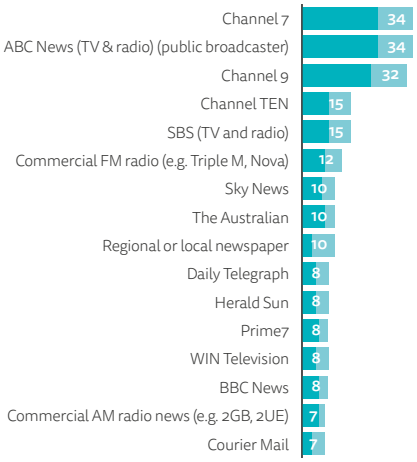
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

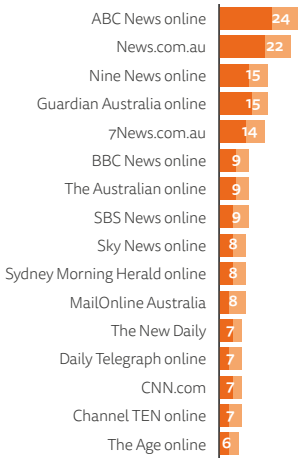
% Weekly usage

- Weekly use TV, radio & print
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TV, RADIO AND PRINT



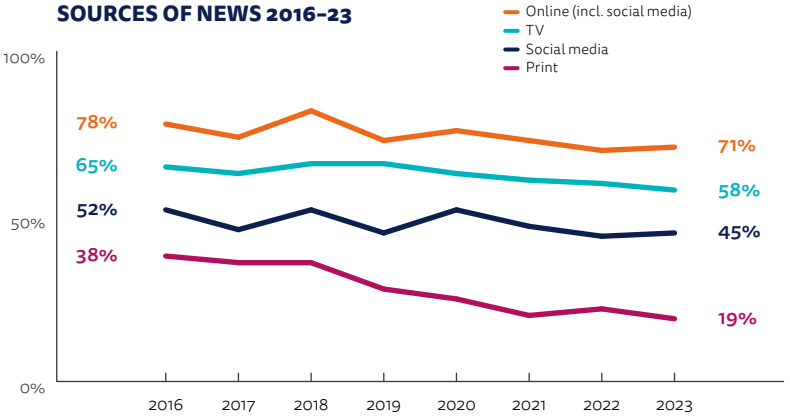
ONLINE



CHANGING MEDIA

TV and print use continue to decline, with ABC TV (-6pp), Channel TEN (-5pp), and Channel 7 (-3pp) losing a substantial share of viewers. Weekly usage of print newspapers has halved since 2016.

SOURCES OF NEWS 2016–23



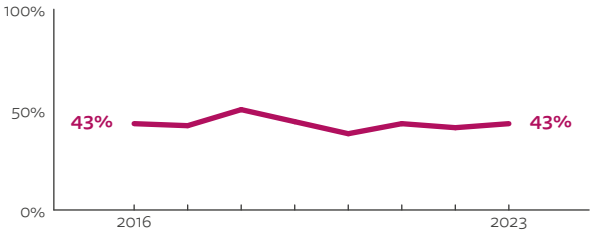
22% PAY
pay for **ONLINE NEWS**

38%
listen to **PODCASTS** in the last month

TRUST

Trust in news (43%) remains at pre-pandemic levels and Australia is still in the mid-range of the 46 countries for trust. Trust in brands has risen. While most mainstream brands recorded small increases, Guardian Australia increased by 6pp to 52%. Public broadcasters and regional/local newspapers continue as the most trusted sources of news. Tabloid metropolitan newspapers the least.

OVERALL TRUST SCORE 2016–23



Proportion that trusts 'most news most of the time'

43%
OVERALL TRUST
=14/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023
Score: **78.24**
27 / 180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
ABC News	66%	18%	16%
Australian Financial Review	55%	30%	15%
BBC News	60%	26%	14%
Channel 7 News	56%	24%	20%
Channel 9 News	57%	23%	20%
Daily Telegraph	44%	30%	25%
Guardian Australia	52%	29%	18%
Herald Sun	46%	28%	25%
News.com.au	49%	28%	23%
Regional or local newspaper	61%	25%	14%
SBS News	66%	22%	12%
Sky News	47%	24%	29%
Sydney Morning Herald	50%	30%	21%
The Age	50%	30%	20%
The Australian	52%	27%	21%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

28%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	32%	(+1)	64%
2	YouTube	23%	(+4)	57%
3	Instagram	14%	(+3)	42%
4	Twitter	12%	(+1)	20%
5	WhatsApp	10%	(+4)	29%
6	Facebook Messenger	9%	(-2)	48%

Population	**7.6m**
Internet penetration	**92%**

HONG KONG



Press freedom in Hong Kong continues to be steadily eroded following the enactment of the controversial National Security Law in 2020. Meanwhile Hong Kong's television broadcasters face mounting financial losses after advertising revenue plummeted during the COVID pandemic, speeding up the search for new business models.

The political ramifications of the National Security Law continue to reverberate among Hong Kong's news media and journalists. The investigative news platform FactWire became the fourth news outlet to cease operations since the law's enactment, following the demise of *Apple Daily*, Stand News, and Citizen News. Established in 2015 through crowdfunding, FactWire developed a reputation for investigative journalism and exposés on political and social affairs in Hong Kong and China. Its closure announcement did not give a clear reason.[96]

Earlier, the Foreign Correspondents' Club (FCC) of Hong Kong announced the cancellation of the 2022 Hong Kong Human Rights Press Awards two weeks before the event that was supposed to coincide with World Press Freedom Day. The FCC had administered the awards since 1996. In a message to members the FCC President noted that 'there remain significant areas of uncertainty and we do not wish unintentionally to violate the law'.[97] It was reported that a contributing factor was that several awards were won by Stand News, whose editors had earlier been charged by the government for publishing seditious materials under the colonial-era crime ordinance. The NGO Human Rights Watch and the Walter Cronkite School of Journalism and Mass Communication at Arizona State University has assumed administration of the 2023 Awards.

The mid-term review of the 12-year free TV and sound broadcasting licences by the Communications Authority, Hong Kong's regulator of the broadcasting and telecommunications industries, included recommendations to the government that free TV and radio stations should 'broadcast no less than 30 minutes of programmes on national education, national identity and National Security Law (NSL) per week'.[98] For English radio channels, the amount of broadcast hours that must be in English would be reduced from at least 80% to 55%. All recommendations were accepted by the government.

These and other developments, such as direct criticisms by high-ranking government officials towards mainstream newspapers that published content portraying the local and Chinese governments negatively, have contributed to a precipitous decline in press freedom in Hong Kong. In the 2023 World Press Freedom Index released by Reporters Without Borders (RSF), Hong Kong ranked 140 compared with 80 in the 2021 index. It is a far cry from its global rank of 18 in the inaugural index published in 2002, where Hong Kong was the freest media market in Asia.

Despite these conditions, a range of online news sites have been established by former journalists in the last few years, including The Witness and hkcourtnews.com, both reflecting public interest in a number of high-profile legal cases that are going through the courts. The Collective is a news site aiming 'to report on people and events in a professional and fair manner, to monitor the powerful, and to seek the truth', and Channel C and Mill Milk are new online video channels producing soft news content, among others.

Television remains an important source of news in Hong Kong but commercial broadcasters continue to post yearly losses and the easing of COVID restrictions are unlikely to improve their financial viability. One of the two pay TV operators, Cable TV, gave up its licence six years before its expiry date to focus on the free TV market as the number of paying subscribers continues to fall, especially as international subscription-based services such as Netflix and Disney+ have become more popular. While the reach of Cable TV's i-CABLE news channel is relatively low compared with other broadcasters and newspapers, it has consistently been among the top four most trusted news brands in Hong Kong based on current and past *Digital News Report* data. According to Cable TV there are no plans to downsize its newsroom, though redundancies in other departments are expected.

The largest TV broadcaster TVB's answer to plummeting advertising revenue has been a concerted strategic shift to e-commerce and expansion to the Mainland Chinese markets. Live-streaming e-commerce in China is a billion-dollar industry with triple-digit growth in past years. In 2023, TVB partnered with Alibaba's online shopping mall and had its performers and artists appear in its live-streaming sales channels to promote various Hong Kong products to generate sales revenue. The results were well received by investors as TVB's stock price surged by 85%.

Michael Chan, **Francis Lee**, and **Hsuan-Ting Chen**
Chinese University of Hong Kong

[96] https://hongkongfp.com/2022/06/10/breaking-hong-kong-investigative-news-platform-factwire-disbands/
[97] 'Press Freedom: Important Notice from the President'. https://www.fcchk.org/press-freedom/hrpa
[98] 'The Communications Authority's Main Recommendations Accepted by the Chief Executive in Council'. https://gia.info.gov.hk/general/202302/14/P2023021400421_412960_1_1676364320169.pdf

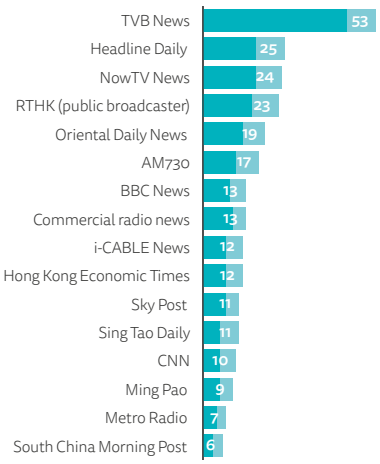
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

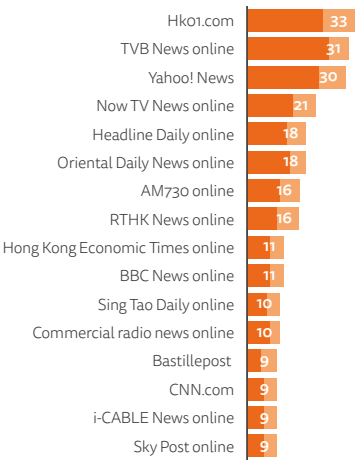
% Weekly usage

- 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

TV, RADIO AND PRINT



ONLINE

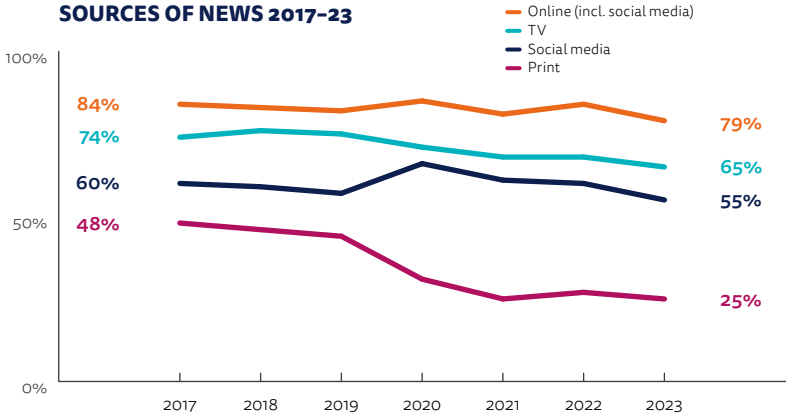


CHANGING MEDIA

The percentage of those accessing news from traditional sources such as TV and print continues to decline each year. Online news usage, which has been largely stable since 2017, declined by 5pp in the last year, partly driven by falls in social media.

16% pay for **ONLINE NEWS**

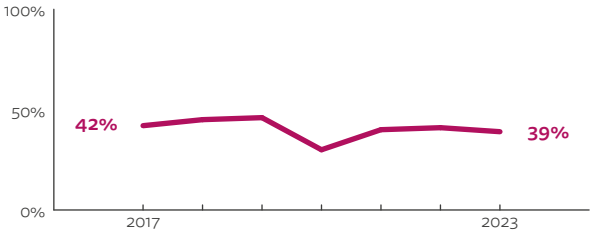
SOURCES OF NEWS 2017–23



TRUST

Overall trust in the news media (39%) has remained relatively stable in the past year, but trust in most news brands remained unchanged or rose slightly. Trust in the public broadcaster RTHK rose by 5% between 2022 and 2023 after dropping by a similar amount the previous year, when a change of leadership occurred and a government official, instead of a veteran news professional, was appointed to head the broadcaster.

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

39% **OVERALL TRUST =22/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **44.86** **140**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
AM730	56%	31%	13%
Bastillepost	41%	34%	25%
Commercial radio	57%	30%	13%
Dot Dot News	36%	42%	23%
Headline Daily	56%	29%	15%
HK01	51%	30%	19%
i-CABLE News	57%	31%	12%
In-media	44%	34%	22%
Ming Pao	57%	27%	16%
NOW TV News	65%	25%	10%
Oriental Daily News	51%	28%	21%
RTHK (public broadcaster)	58%	26%	17%
Sing Tao Daily	55%	27%	18%
TVB News	55%	20%	26%
Yahoo! News	57%	30%	12%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

39% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	44%	(-2)	69%
2	YouTube	40%	(+4)	73%
3	WhatsApp	28%	(-5)	79%
4	Instagram	17%	(-)	48%
5	WeChat	11%	(-1)	43%
6	Twitter	7%	(+1)	16%

Population	**1,414m**
Internet penetration	**60%**

INDIA



Indian media companies are facing tough times through a combination of declining interest in news, lower trust, and falling revenues. Meanwhile human rights groups say press freedoms have become increasingly threatened.

India slipped to its worst position on record in the Press Freedom Index this year (161 out of 180 countries), published by Reporters Without Borders (RSF).[99] The report notes that the press in India is facing challenges regarding journalists' security and undue political influence. Independent journalists and media owners who carry out investigative work or those that have been critical of governments (both central and state) face physical threats as well as online harassment and legal charges.

Even foreign media were affected, with the offices of the BBC surveyed amid suggestions of tax irregularities in February. The surveys at the BBC came just a few weeks after the broadcaster released *India: The Modi Question*, a documentary series critical of Prime Minister Modi and his role in the Gujarat riots in 2002, when he was the state's chief minister. The Information and Broadcasting Ministry responded by ordering social media platforms YouTube and Twitter to take down links and tweets on the documentary under the new IT rules, with officials in the government claiming the content lacked 'objectivity'.[100] Similar investigations on NGOs and think tanks have led independent media bodies to criticise these surveys as a form of intimidation.

The central government is further modifying the IT rules by setting up a fact-check unit under it, to identify 'fake, false, or misleading' information concerning the government, which intermediaries need to remove from their platforms. This has been widely criticised for overreach and endangering freedom of speech – as well as for contradicting earlier procedures laid down by the Supreme Court for blocking online content.[101]

Some relief, however, came last May when the Supreme Court of India suspended the controversial and colonial-era sedition law, directing the government to review it. Further, in the case of TV channel Media One, where the government revoked its licence, the top court noted that being critical of the government cannot be considered 'anti-establishment' and refusing security clearance to operate will create a 'chilling effect' on press freedom.[102]

Legacy brands in broadcast and print, NDTV 24x7, BBC News, Republic TV, and *Times of India*, were the top news sources attracting viewers online and offline. *Dainik Bhaskar*, a Hindi daily, featured among the top ten legacy brands accessed both online and offline by survey respondents, indicating a strong presence for the local language press even among English news readers.

But across different sources this year, our Digital News Report survey finds steep falls in both the consumption and sharing of news. There was a sharp decrease in access to online news (12 percentage points lower than last year), particularly through social media (-11pp), the main sources of news for a predominantly younger audience. Television, popular among a large section of the population, also saw a 10pp decline as a news source with our younger and more urban-based sample. These falls in news use can be attributed, in part, to the reducing impact of the pandemic, with lockdown restrictions withdrawn in April last year.

NDTV, considered an independent voice in the polarised television news space in India, was taken over by the Indian business conglomerate Adani Group's AMG Media Network in August 2022. The takeover was another addition to a host of media organisations now owned or controlled by big business conglomerates in India. In January, the Adani group faced the heat after a report by US-based Hindenburg Research alleged that the company had committed 'accounting fraud' and 'stock manipulation' along with being on 'precarious financial footing' because of heavy debt.[103]

In a news environment characterised by reduced levels of trust, The Wire, an independent non-profit website, faced a severe credibility crisis for its investigative series on Meta in October. In its articles, it was alleged that special privileges were provided to a senior functionary in the ruling BJP government through Meta's XCheck program. The allegations were strongly denied, and The Wire eventually retracted its stories after it found evidence that the central thrust of the story was fabricated and misleading. The Wire lost some audience trust (-5pp) in our annual brand trust ratings.

Digital-born brands, while not as popular in reach as legacy media brands, are attracting dedicated and engaged audiences. Among these are bilingual independent brands like NewsClick, as well as brands owned by traditionally strong regional players like Catch News (of the Patrika group), affirming a strong preference for news across languages for our survey respondents.

Anjana Krishnan
Research Associate, Asian College of Journalism, Chennai

[99] https://rsf.org/en/country/india
[100] https://www.theguardian.com/world/2023/jan/23/india-emergency-laws-to-ban-bbc-narendra-modi-documentary
[101] https://internetfreedom.in/statement-on-the-notification-of-the-it-amendment-rules-2023/
[102] https://main.sci.gov.in/supremecourt/2022/6825/6825_2022_1_1501_43332_Judgement_05-Apr-2023.pdf
[103] https://hindenburgresearch.com/adani/; https://www.ft.com/content/e06b1797-7ac6-49f5-b4c8-cdf47652f65d

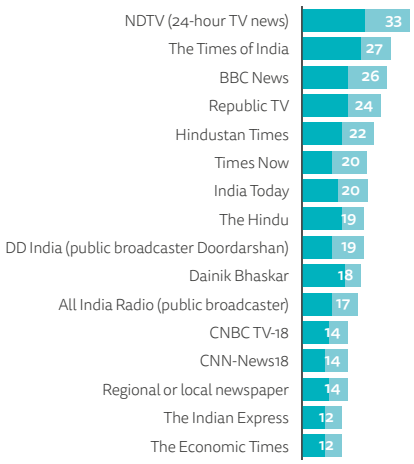
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

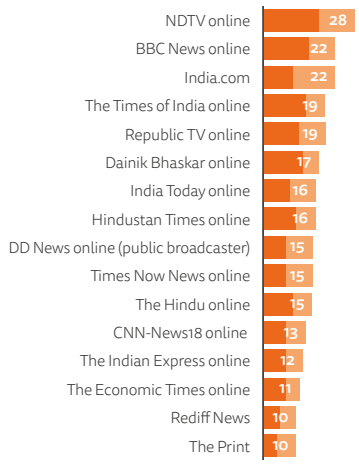
% Weekly usage

- 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

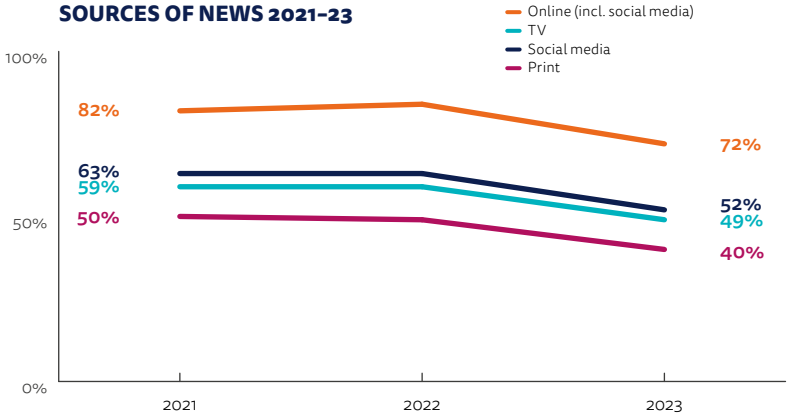


Also	
The Quint:	9%
The Wire:	8%
Firstpost:	8%
News Click:	8%
The News Minute:	8%
Catch News:	6%
Livemint:	6%
News Laundry:	6%
Scroll.in:	6%

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 in this online poll will tend to under-represent the continued importance of traditional media such as TV and print.

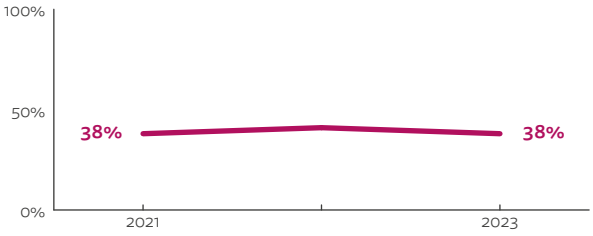
SOURCES OF NEWS 2021–23



TRUST

Despite a small decrease (3pp) in overall trust in news, public broadcasters and legacy print brands retained relatively high levels of trust. Public broadcasters DD India and All India Radio (and the BBC) are among those with the highest levels of trust. Independent outlets that report critically on those in positions of power are often actively distrusted by some respondents and subject to coordinated harassment, so scores should not be seen as a measure of the quality or trustworthiness of the content itself.

OVERALL TRUST SCORE 2021–23



Proportion that trusts 'most news most of the time'

38%
OVERALL TRUST
=24/46 markets

RSF REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2023** Score: **36.62** **161**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
All India Radio	69%	14%	17%
BBC News	66%	12%	22%
CNN-News18	62%	17%	21%
DD India	70%	13%	18%
Economic Times	67%	13%	19%
Hindustan Times	67%	13%	20%
India Today TV	63%	15%	21%
NDTV	64%	15%	21%
Regional or local newspaper	63%	17%	20%
Republic TV	58%	15%	26%
Scroll.in	50%	23%	27%
The Hindu	66%	14%	20%
The Indian Express	66%	14%	20%
The Times of India	69%	13%	18%
The Wire	52%	20%	27%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

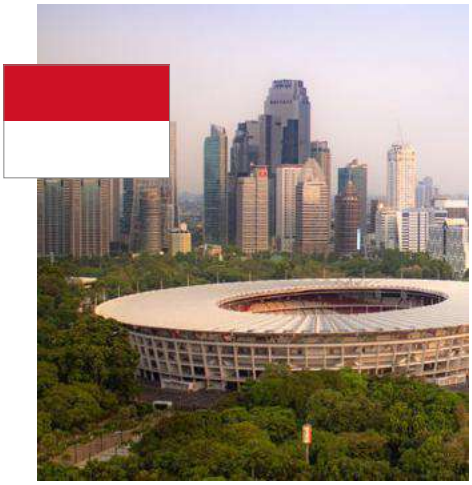
47%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	YouTube	56%	(+3)	72%
2	WhatsApp	47%	(-4)	69%
3	Facebook	39%	(-4)	55%
4	Instagram	32%	(-)	50%
5	Telegram	20%	(-1)	38%
6	Twitter	20%	(-2)	30%

Population	**278m**
Internet penetration	**76%**

INDONESIA



A new criminal code which, among other things, bans publishing insults against the president, became law in December 2022. The new law has been described by human rights activists as a significant setback for Indonesia's reputation for press freedom.

Bans on extra-marital sex and cohabitation attracted widespread international attention when they were introduced late last year. But when it comes to news, media, and journalism, it was 17 articles in the country's new criminal code which drew criticism from human rights activists and from the independent Indonesian Press Council. The new laws, they said, had the capacity to threaten press freedom because they included bans on insulting the president, the vice-president, state institutions, the flag, and even the state ideology (known as Pancasila). Beh Lih Yi, the Committee to Protect Journalists' Asia programme coordinator, said the new law 'could cause members of the press to be jailed for simply reporting the news'.[104] International organisations such as Human Rights Watch have joined the Indonesian Press Council and the Alliance of Independent Journalists in condemning the move.

After the toppling of Soeharto in 1998, Indonesia had become a regional model for press freedom. The new code, combined with a rise in conservative social policies, reflects changes in public opinion which many worry could presage a tilt back towards authoritarianism.

Indonesia's media environment, however, continues to be diverse, with independent outlets expressing a wide range of views. Despite this diversity, powerful media companies owned by tycoons, some with political aspirations, dominate the media landscape. Foreign ownership of broadcast media is banned, but there are few restrictions on news production and distribution for Indonesians.

The past few years have, however, witnessed encroachments on digital freedom of 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.

Also worrying to advocates for press freedom is Ministerial Regulation 5 (MR5), which was introduced in 2020 by the Ministry of Communication and Information Technology to govern the functioning of private 'electronic systems operators' (ESOs). This includes social media platforms, search engines, e-commerce platforms, games, and communications services, and applies both to Indonesian services and to multinationals such as Facebook, Twitter, Google, and TikTok.

Granting the government authority to regulate private ESO activity, MR5 gives authorities access to user data, and provides for sweeping notice and take-down orders. In June 2022, the Ministry of Communications announced a July deadline for online actors to register with it or face consequences.

WhatsApp, YouTube, Facebook, and Instagram are extremely popular among users in Indonesia, and between a third and half of Indonesians report getting their news from these platforms. Because of this popularity, much attention has been directed to social media's role in spreading disinformation, political propaganda, 'hoaxes', and hate speech. COVID-19 led to a flood of misinformation, and the presidential election scheduled for 2024 has likewise prompted widespread concern about the use of automated accounts and paid commentators, locally known as 'buzzers', to promote various political interests.

In response to the prevalence of disinformation on social media, Indonesia is home to the Indonesian anti-hoax community, Mafindo, a multi-stakeholder NGO with 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.

Indonesian media continue to suffer a loss of advertising revenue. The newspaper *Republika*, founded in 1993 to serve the Muslim community, stopped its print edition in December 2022, going online only. The BBC World Service ended its Indonesian-language radio broadcasts in September, although its digital presence remains. Podcasting is a growing area, with many newcomers following the lead of the country's most popular podcaster, Nadhifa Allya Tsana. However it's not a hunger for news which is behind the growth. Research by PodNews[105] indicates that it's actually Gen-Z's desire for wellness-related content which is driving the sector – Tsana's background is in writing romantic novels.

Janet Steele
Professor of Media and Public Affairs and International Affairs, George Washington University

[104] https://cpj.org/2022/12/indonesia-adopts-new-criminal-code-that-undermines-press-freedom/
[105] https://podnews.net/article/podcast-in-asia-indonesia-vietnam

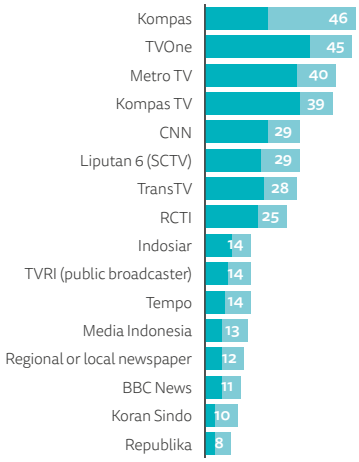
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

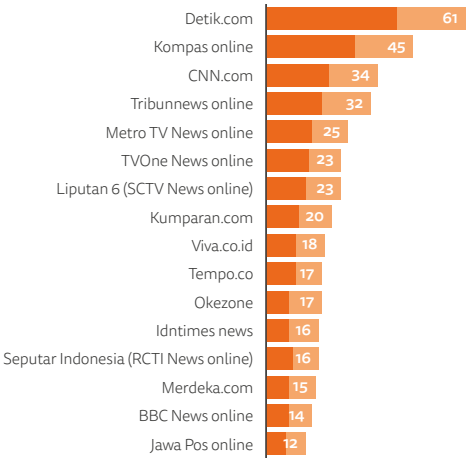
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TV, RADIO AND PRINT



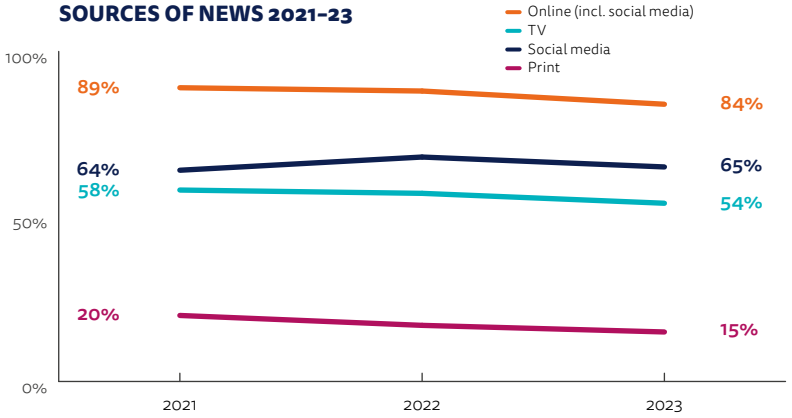
ONLINE



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.

SOURCES OF NEWS 2021–23

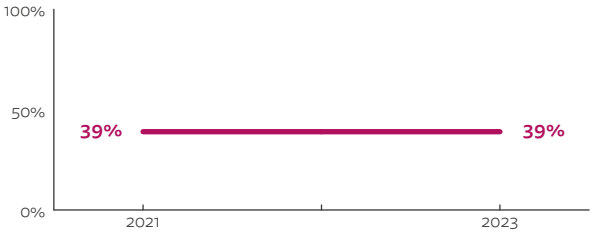


19% pay for **ONLINE NEWS**

TRUST

Overall trust in news remains stable at 39% for the third year in a row. The five most trusted brands – Kompas, CNN, TVRI, Liputan6, and Detik.com – have remained stable over the past three years, with Kompas (69%) edging out CNN (68%) as the most trusted brand for the first time since the *Digital News Report* began tracking in 2021.

OVERALL TRUST SCORE 2021–23



Proportion that trusts 'most news most of the time'

39% **OVERALL TRUST =22/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **54.83** **108**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
CNN	68%	26%	6%
Detik.com	63%	30%	7%
Jawa Pos	54%	40%	6%
Kompas	69%	26%	6%
Kumparan.com	50%	40%	10%
Local television news	57%	36%	7%
Merdeka.com	52%	41%	8%
SCTV (Liputan6)	64%	30%	6%
Sindonews.com	52%	40%	8%
Suara.com	48%	44%	9%
Tempo	60%	32%	8%
Tirto.id	44%	45%	11%
Tribunnews	55%	36%	9%
TVOne	60%	29%	12%
TVRI	66%	30%	5%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

38% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	WhatsApp	51%	(-3)	82%
2	YouTube	48%	(+2)	78%
3	Facebook	38%	(-6)	59%
4	Instagram	37%	(-)	63%
5	TikTok	22%	(+6)	39%
6	Twitter	21%	(+1)	33%

Population	127m
Internet penetration	93%

JAPAN



Japan's inflation rate hit the highest level in over four decades, squeezing household budgets. These economic shocks, coming on top of COVID-19 lockdowns, look set to accelerate further changes in the country's media landscape, once characterised by strong daily newspaper and television networks.

Daily newspaper circulation has fallen by around a third in the last decade, from 47.8 million in 2012 to 30.8 million last year.[106] Commercial broadcasters, especially ones that provide local news services, continue to be badly affected by lower advertising revenues, prompting debate about changing their licence remit, to allow them to broadcast over wider areas. Meanwhile, the public broadcaster NHK announced plans to reduce the annual fee its viewers pay by around 10% from October 2023 to ease the impact of the cost of living. The corporation will cut one of its satellite channels in addition to reducing AM radio services, as part of its plans to balance the books.

While making money from digital media remains difficult, some traditional news brands are accelerating their online strategies. The country's leading liberal daily, *Asahi Shimbun*, took a bold step to put all its articles behind a hard paywall for the first time. At the same time, the paper introduced a new service that enables subscribers to share two to five stories as 'gifts' to their friends for 24 hours. *Nikkei*, a pioneer in pushing digital business models, has also been tightening its paywall strategy with non-subscribers allowed to read just one article a month instead of the previous ten. Meanwhile, the conservative daily, *Yomiuri Shinbun*, which still has the largest print circulation in Japan (6.6 million), continues to restrict digital access to print subscribers, in a bid protect its highly profitable newspaper business. It still does not offer a digital-only subscription.

Digital-born players are gaining ground in the wider media ecosystem. Abema TV, a streaming TV service co-owned by internet entertainment company Cyberagent and commercial broadcaster TV Asahi, live-streamed the World Cup football in December 2022.[107] It was an unprecedented move by an internet TV service to successfully deliver all 64 games to as many as 23 million viewers for free – a stark contrast to commercial broadcasters who failed to broadcast some games despite having paid expensive broadcasting rights.

Yahoo! Japan and LINE announced a merger, streamlining its operation. Yahoo!'s news provision has a massive readership, and LINE is Japan's dominant messaging app, with its LINE NEWS aggregator widely used by the younger generation. Both already operate under the ownership of Z holdings, backed by SoftBank conglomerate, but the further integration is aimed at cutting costs, driving better products, and more innovation.[108]

The COVID pandemic, the war in Ukraine, and the shooting of former Prime Minister Shinzo Abe have all raised awareness about the dangers of misinformation and disinformation in a fast-paced and more socially driven news environment. In October 2022, a Tokyo-based non-profit organisation launched the Japan Fact-Check Center made up of journalists and academics. Supported by donations from Yahoo! Japan and Google, it plans to publish ten articles a month on the authenticity of information in online spaces. In a further move to improve the quality of online debate, Yahoo! Japan made it mandatory for users to register mobile phone numbers before posting comments on its news stories.

In March 2023, a controversy erupted in the national diet (parliament) over the government's interpretation of political impartiality in broadcasting. The opposition party revealed a leaked document showing how the administration of then Prime Minister Abe put pressure on the Ministry of Communications to extend the interpretation to cover a single broadcast programme, rather than judging political impartiality over the entirety of the output.

Current Prime Minister Fumio Kishida's closest aide was forced to resign after the *Mainichi Shimbun* newspaper[109] reported a homophobic comment during a background briefing. These briefings are held under the rule that reporters do not name the source, but the paper justified its action by saying it was in the public interest since the comment seriously violated the rights of sexual minorities. *Mainichi* let the aide know in advance that it was naming him, but the decision has raised wider questions about trust of journalism and the circumstances under which journalists should break promises to protect the anonymity of their sources.

Yasuomi Sawa
Journalist and Professor at the Department of Journalism, Senshu University
Reiko Saisho
NHK, Broadcasting Culture Research Institute

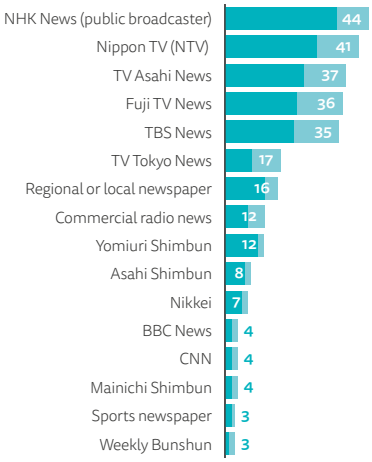
[106] https://www.pressnet.or.jp/english/data/circulation/circulation01.php
[107] https://www.japantimes.co.jp/news/2022/12/06/business/tech/2022-fifa-world-cup-abema-livestream/
[108] https://www.japantimes.co.jp/news/2023/02/03/business/corporate-business/z-holdings-yahoo-japan-line-merger/
[109] https://www.japantimes.co.jp/news/2023/02/05/national/politics-diplomacy/masayoshi-arai-japan-same-sex-marriage-hate/

WEEKLY REACH OFFLINE AND ONLINE

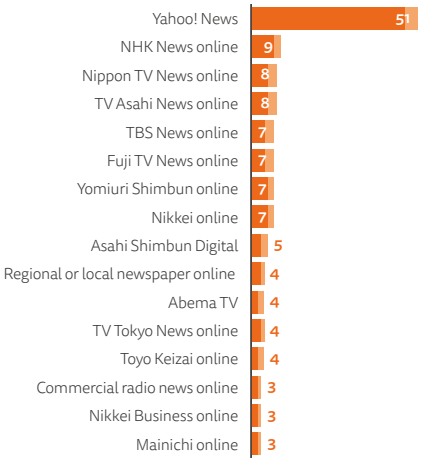
TOP BRANDS
% Weekly usage

- 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



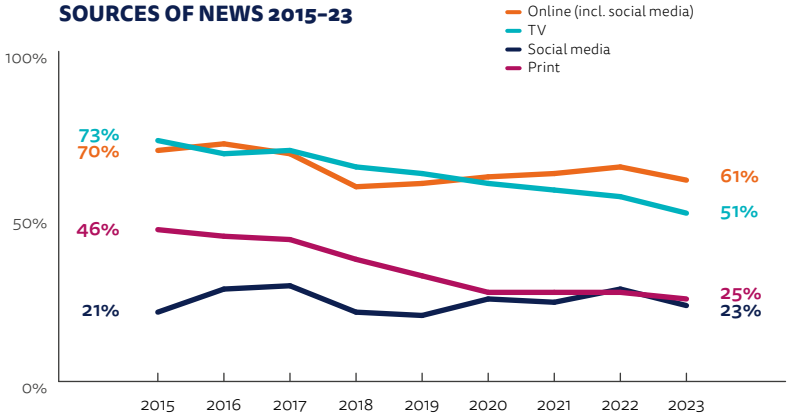
CHANGING MEDIA

In Japan's super-ageing society, where over-65s make up almost a third (29%) of the population, the generational gap in media consumption is widening. Older people still cling to TV and print, but younger groups mainly get news from online aggregators and also from social media.

9% pay for **ONLINE NEWS**

24% listen to **PODCASTS** in the last month

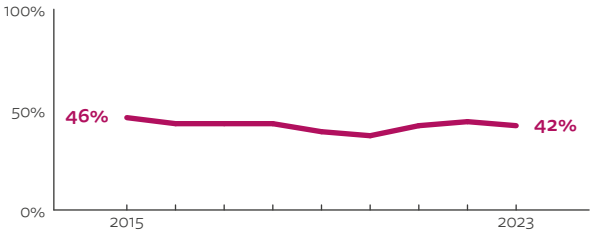
SOURCES OF NEWS 2015-23



TRUST

Trust in the news remains stable after it bounced back from two years of decline between 2019 and 2020. There is no significant difference in the level of trust in news in general versus 'the news I consume', which Japanese academics point to as a unique character of the Japanese market, indicating the consumers' passive behaviour or even apathy towards news.

OVERALL TRUST SCORE 2015-23



Proportion that trusts 'most news most of the time'

42%
OVERALL TRUST
=17/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023
Score: **63.95**
68/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Asahi Shimbun	46%	34%	20%
Fuji TV News	53%	33%	14%
Local newspaper	53%	36%	11%
Mainichi Shimbun	48%	37%	16%
NHK News	61%	27%	12%
Nikkei	55%	35%	11%
Nippon TV News	55%	33%	12%
Sankei Shimbun	48%	39%	14%
TBS News	54%	32%	13%
TV Asahi News	51%	33%	16%
TV Tokyo News	53%	36%	11%
Weekly Bunshun	28%	42%	31%
Weekly Shincho	29%	45%	26%
Yahoo! News	49%	36%	15%
Yomiuri Shimbun	51%	35%	13%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

13%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	YouTube	26%	(+4)	58%
2	Twitter	16%	(-2)	32%
3	Line	13%	(-3)	38%
4	Instagram	4%	(-)	23%
5	Facebook	4%	(-1)	14%
6	TikTok	3%	(+1)	9%

Population	33m
Internet penetration	94%

MALAYSIA



Three years of the pandemic, lockdowns, and political and economic uncertainty have deepened the worries of the already-struggling Malaysian print media. On the other hand, social media apps such as TikTok became politically central to the recent election campaign, raising concerns for the new government.

There was the initial uncertainty and fear of a hung parliament after the 15th General Elections (GE15) in November 2022 when no one party or coalition was able to form the new government. Nonetheless, a quickly cobbled-together 'unity government' was formed, based on the advice and with the consent of Malaysia's constitutional monarch, and led by the charismatic Anwar Ibrahim.

The first few months of the Unity government have seen some worrying – and other, more positive – developments for the media. On the plus side, talks about setting up an independent, self-regulated Media Council were revived by the new Communications and Digital Minister, after having been taken off the agenda by the two previous, short-lived regimes. There remains the question of the funding of the Council which, it is envisioned, will come through taxation. It is anticipated that repeal of long-standing oppressive media laws such as the Printing Presses and Publications Act 1984 (PPPA) will follow.

On the minus side, religious and racial hate speech on social media has been on the rise, especially during and immediately after the GE15 campaign period. After the election, TikTok removed 1,126 videos deemed 'provocative and extreme' after a meeting with the Communications and Digital Ministry officials.[110] The government says it is looking at allegations that political parties also paid content creators to disseminate their narratives on TikTok. The app has been growing rapidly in the last few years, according to our Digital News Report survey, with four in ten (42%) using it for any purpose and around a quarter (24%) for news – up 9 percentage points on last year.

Apart from official acts of censorship, the new government and the numerous media organisations do not appear to have constructive ideas to counter such hate speech or to come up with a strategy providing a different, inclusive narrative. Indeed, when there was a belated backlash against a 2021 film, *Mentega Terbang* (a play on the word 'butterfly') that was only streamed online and not played in Malaysian cinemas, the ministry sided with the conservatives, reportedly saying that they 'would take action against the controversial film' which was officially deemed as going 'against Islamic teachings'.[111]

What is evident over the past year is that the media industry, which is still recovering from the pandemic, faces a number of key challenges. First, financial problems continue to affect print publications with the fallout from the closure of Malaysia's biggest national-language newspaper, *Utusan Malaysia* (UM), in October 2019 still being felt; 800 workers were laid off then and many took UM to court over compensation benefits.

Second, trust issues still prevail, with social media seemingly being more immediate, exciting, and easily digested by many Malaysians, especially during the election campaign of November 2022.[112]

Third, we are seeing more political influence being exercised over a number of online news organisations. Free Malaysia Today and The Vibes are two companies run by individuals closely aligned with senior political party leaders. Since GE15, The Vibes has been at the forefront in providing positive news of Anwar Ibrahim's Unity government.

Both the founders of the still-independent Malaysiakini news portal, Steven Gan and Premesh Chandran, left the organisation this past year, Gan retiring and Chandran moving to an international funding agency. Whether the popular Malaysiakini will change direction remains to be seen, although Gan has openly stated that safeguards are already in place to ensure Malaysiakini remains independent both financially and politically.

Astro Awani, which has second highest reach in both the offline and online news sources list, continues to be innovative and quite critical in a broadcast environment that appears to be on a downward trajectory as a source for news, certainly since 2021. Looking ahead, Awani has been designing new programmes for Malaysia's youth, presented by talent drawn from a new generation.

All in, the past year has been very much a year of consolidation for the main news media brands while they wait to see how media policy develops. On the one hand Anwar Ibrahim's reformist party talks about letting an independent media self-regulate, but on the other, it conforms to the dictates of the more conservative elements in the coalition when it comes to questions of censorship and freedom of expression.

Zaharom Nain
University of Nottingham in Malaysia

[110] 'Tik Tok Took Down 1,126 Provocative Videos After GE15, says Fahmi', TheStar online. 7 Dec. 2022. https://www.thestar.com.my/news/nation/2022/12/07/tiktok-took-down-1126-provocative-videos-after-ge15-says-fahmi
[111] https://worldofbuzz.com/fahmi-controversial-mentega-terbang-film-has-been-removed-from-streaming-service/
[112] Centre for Independent Journalism Malaysia, 'Social Media Monitoring of Malaysia's 15th General Elections', unpublished project report in partnership with the University of Nottingham Malaysia, Universiti Sains Malaysia and Universiti Malaysia Sabah, 2023, 11–32.

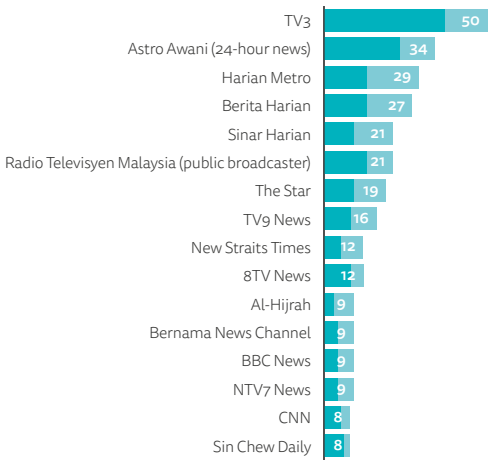
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

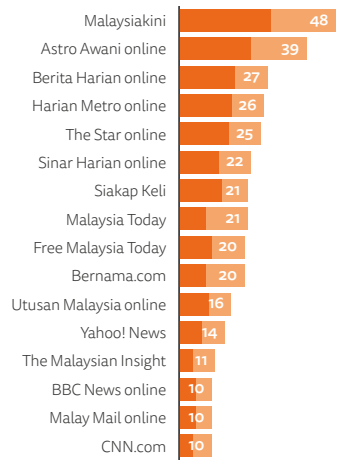
% Weekly usage

- 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



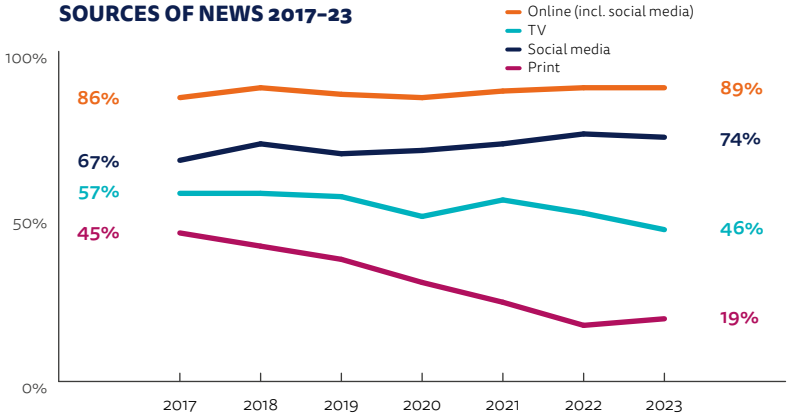
ONLINE



CHANGING MEDIA

Weekly use of print newspapers has more than halved since 2017, but television news is also becoming less important. Social media is a convenient alternative with Facebook, WhatsApp, YouTube, and now TikTok being key platforms for accessing news.

SOURCES OF NEWS 2017–23

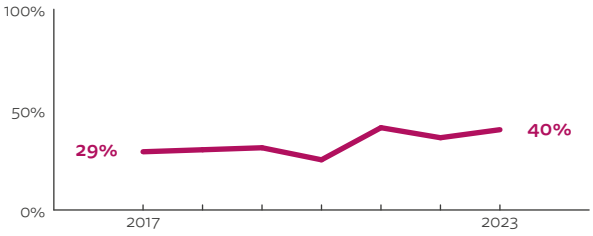


18% pay for **ONLINE NEWS**

TRUST

News trust overall (40%) is up by 4pp on last year, along with the trust levels of most individual brands – perhaps reflecting the optimism felt with a new government promising some reforms. National-language and vernacular newspapers have long been recognised as often being politically owned and aligned, affecting trust. This process is now affecting some digital-born outlets too.

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

40% **OVERALL TRUST =20/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **62.83** **73**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Astro Awani	70%	21%	10%
Berita Harian	63%	26%	11%
Free Malaysia Today	55%	30%	15%
Harian Metro	59%	28%	13%
Malaysiakini	63%	24%	13%
Radio Televisyen Malaysia	66%	24%	11%
Regional or local newspaper	61%	28%	11%
Sin Chew Daily	48%	36%	16%
Sinar Harian	61%	27%	12%
The Malaysian Insight	55%	32%	13%
The Star	64%	25%	11%
TV3 News	62%	23%	15%
TV9 News	63%	27%	10%
Utusan Malaysia	57%	28%	15%
Yahoo! News	53%	33%	15%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

44% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	51%	(-1)	70%
2	WhatsApp	45%	(-2)	77%
3	YouTube	37%	(-2)	71%
4	Instagram	24%	(-)	47%
5	TikTok	24%	(+9)	42%
6	Twitter	18%	(-4)	27%

Population	112m
Internet penetration	91%

PHILIPPINES



The Philippine media landscape remains largely grim despite the change in the country's leadership in mid-2022. Attacks on journalists, which escalated during the six-year presidency of Rodrigo Duterte, have not let up since Ferdinand Marcos Jr. took office.

Dozens of violations of press freedom have already been recorded under Marcos's watch – 75 cases between June 2022 and April 2023 – topped by the killing of two hard-hitting radio commentators and increasing use of legal action ('lawfare') against journalists.[113] A prominent critic of Duterte and Marcos, Percival Mabasa, was gunned down south of Manila in October, and soon afterwards death threats were sent to at least three journalists on social media. Police in plain clothes paid 'surprise visits' to homes of several reporters, stoking fears of surveillance of journalists.

'Red-tagging' of journalists – being branded as a communist or terrorist – persists. The targets come from mainstream and alternative media alike: journalists from ABS-CBN and GMA networks, *Philippine Daily Inquirer*, Rappler and Bulatlat news sites, the community paper *Northern Dispatch*, and representatives of media organisations such as the National Union of Journalists of the Philippines (NUJP).

Among those behind the systematic red-tagging is Sonshine Media Network International (SMNI), a far-right broadcast network owned by religious leader Apollo Quiboloy, wanted by the Federal Bureau of Investigation for sex trafficking and corruption charges. SMNI, which was awarded a free-to-air frequency that ABS-CBN had held till Congress rejected its franchise renewal application in 2020, is included in this year's survey: 12% of respondents said they accessed online news from SMNI, demonstrating its popularity since the 2022 election despite having been flagged for peddling disinformation. The latest to join the network's roster of commentators is Duterte himself who in January revived his weekly show *Gikan sa Masa, Para sa Masa* (From the Masses, For the Masses) days before the International Criminal Court announced the reopening of its investigation into possible 'crimes against humanity' arising from his brutal antidrug campaign. Duterte's programme originally aired on ABS-CBN Davao from 2001 to 2015 when he was city mayor.

In response to the spike of cyber libel and other criminal cases against journalists, the NUJP teamed up with lawyers' groups to launch Project Lawfare for their defence. As one example of the extent of these actions, two broadcasters in southern Luzon are facing 941 counts of cyber libel lodged by a provincial governor.

Rappler, which was repeatedly attacked by Duterte when he was president, and its CEO and Nobel laureate Maria Ressa were acquitted of tax evasion in January. But six months earlier, an appellate court upheld a decision convicting her and a former colleague of cyber libel and even increased their prison sentence, and public perception of the site is no doubt in part influenced by ongoing social media attacks from influencers, partisan activists, and others.

Radio and TV brands remain the most popular media overall in the Philippines, with the big GMA Network having a dominant audience share: 53% accessed it offline and 48% online. In February, the network began broadcasting morning news programmes in several regions, further boosting local TV news.

GMA's longtime competitor, the Lopez-owned ABS-CBN Corp., was stripped of its franchise in 2020 but continues to broadcast online and via various agreements. Its long-running nightly newscast, *TV Patrol*, simulcasts on its own cable channels as well as A2Z of the evangelical church-owned Zoe Broadcasting, and is now among the top 20 most-viewed TV programmes. But a multimillion-dollar deal with TV5 that was supposed to pave its return to free TV was terminated in September amid threats of lawmakers and the government to investigate it for possible violations of the law. Meanwhile ABS-CBN is closing its TeleRadyo news channel to stem further financial losses and will seek to distribute its content via new partnerships.

ALLTV, owned by business mogul and Duterte-Marcos ally Manuel Villar, debuted in September on the frequency once assigned to ABS-CBN. Instead of producing its own news programmes, it tied up with CNN Philippines to broadcast the recently revived hourlong *News Night*.

In answer to falling sales and rising costs of community publications impacted by economic downturn, inflation, and the pandemic, the Philippine Press Institute, an association of newspaper publishers, in October converted the PPI News Commons into a news aggregator with its 70 members on board, in hopes of leveraging the wider market base to attract ads. Last year, the Philippines became the first market in Southeast Asia to roll out Ads for News,[114] a global effort that seeks to direct digital advertising to trustworthy local news outlets screened to exclude disinformation and other content unsuitable for brands. Three big Philippine corporations have initially agreed to take part in the programme.

Yvonne T. Chua
University of the Philippines

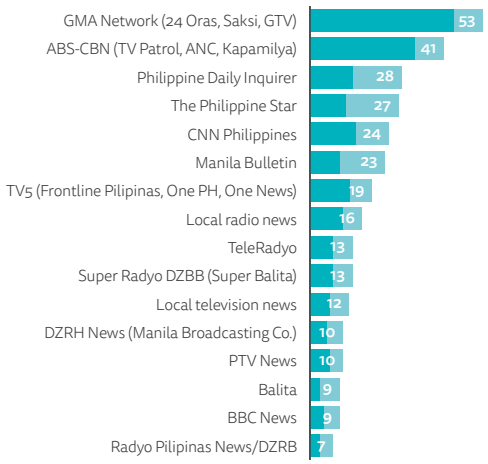
[113] https://pcij.org/article/10122/2023-state-of-press-freedom-in-the-philippines
[114] https://www.adsfornews.org/

WEEKLY REACH OFFLINE AND ONLINE

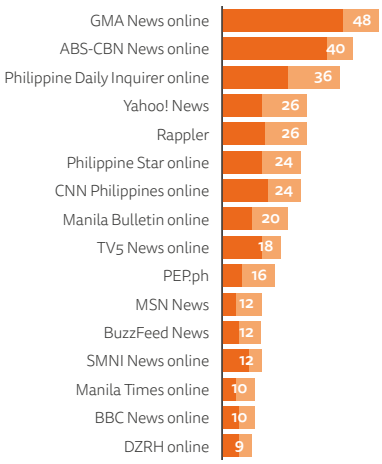
TOP BRANDS
% Weekly usage

- 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

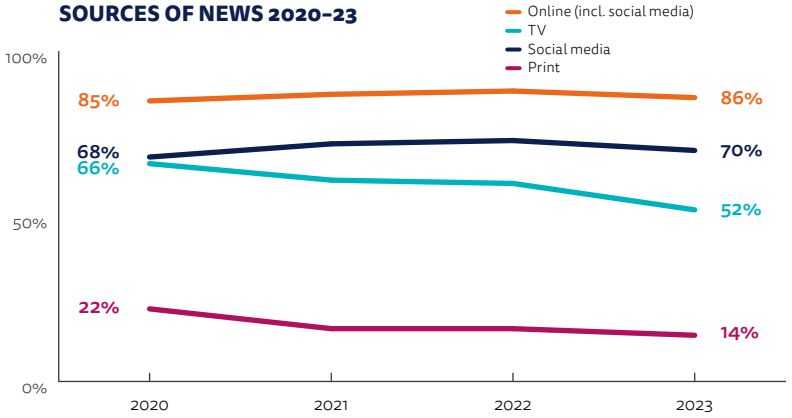


CHANGING MEDIA

Online and social media remain the most popular sources of news in the Philippines with our more urban sample, while TV and radio news remain important for those who are not online. TikTok has grown the fastest among the social media platforms, accessed for news now by 21% compared with only 2% in 2020.

16% pay for **ONLINE NEWS**

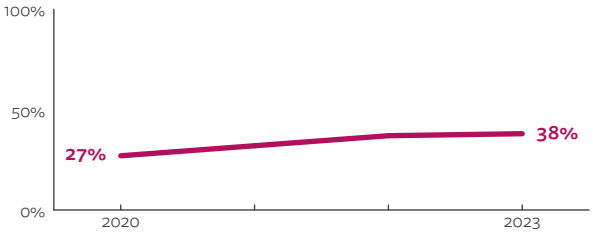
SOURCES OF NEWS 2020–23



TRUST

Overall trust in news, boosted to some extent by the COVID-19 pandemic as Filipinos came to rely more on the news media, remains stable at 38%. Many of the longest established media brands such as GMA Network and the *Philippine Daily Inquirer* have relatively high levels of trust but some independent outlets respected for their reporting on those in positions of power are often actively distrusted by supporters of the politicians in question and subject to coordinated harassment, so scores should not be seen as a measure of the quality or trustworthiness of the content.

OVERALL TRUST SCORE 2020–23



Proportion that trusts 'most news most of the time'

38%
OVERALL TRUST
=24/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **46.21** **132**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Abante/Abante Tonight	50%	35%	15%
ABS-CBN	62%	20%	18%
DZRH	68%	25%	7%
GMA Network	74%	19%	8%
Manila Bulletin	68%	23%	9%
Philippine Daily Inquirer	68%	21%	11%
PTV	61%	27%	12%
Radyo Pilipinas	61%	30%	9%
Rappler	47%	21%	33%
Regional or local newspaper	64%	29%	8%
SunStar	58%	32%	10%
Super Balita DZBB	68%	24%	8%
TeleRadyo	66%	25%	8%
The Philippine Star	68%	23%	8%
TV5 Information	68%	22%	10%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

47%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	72%	(-1)	84%
2	YouTube	55%	(-2)	80%
3	Facebook Messenger	33%	(-2)	68%
4	TikTok	21%	(+6)	42%
5	Twitter	16%	(-)	27%
6	Instagram	14%	(-1)	38%

Population	**5.9m**
Internet penetration	**92%**

SINGAPORE



Singapore has become a regional base for many media and technology companies due its political stability, educated workforce, and good communications. TikTok has even based one of its two global headquarters in the city state, and with a charismatic local CEO, the app is growing in popularity with young Singaporeans.

In March, TikTok CEO Shou Zi Chew underwent four and a half hours of often hostile questioning before a US congressional committee. He defended the app from accusations that it was a tool of global influence for China, that it collected user data, and from calls that it should be banned. When asked if his own children used the app, he said they did not, adding that TikTok's version for children younger than 13 is not available in Singapore.

Born in Singapore to Chinese parents, Chew studied in London and at Harvard, did an internship at Facebook, and worked as an investment banker before he joined TikTok's parent company ByteDance as chief financial officer. He became CEO in 2021. In preparation for the hearings, he posted a video on TikTok of himself addressing the US public, pointing out that more than half of the US population uses the app and that 7,000 Americans are employed by it.

The app is growing in popularity in Singapore as elsewhere – it reaches 49% of 18–24s every week, and 22% for news according to our survey – but it is not without controversy. Public officials have been reminded they are not permitted to install the app on official devices, and it has been added to the list of social media companies that are required to have formal processes and systems for dealing with misinformation, under the country's Protection from Online Falsehoods and Manipulation Act (POFMA).[115] This includes transparency over political advertising.

The Act is among the latest additions to Singapore's extensive regulations for offline and online news platforms. 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 also required individual licensing for online news sites that publish regular articles on Singapore news and current affairs and have large numbers of monthly visitors.

That definitely describes the digital-native Mothership, an alternative news site which converts viral social media posts into short-form articles and videos. It has become the most used online news source for the first time (used weekly by 48%). Launched in 2014, it has now surpassed the news sites of mainstream competitors such as Mediacorp's Channel NewsAsia (46%) and SMT's *The Straits Times* (42%).

In December 2021, Singapore Press Holdings, publisher of most of Singapore's printed newspapers, carved out its media interests into a new non-profit entity, SPH Media Trust (SMT). It is now the parent company for the *Straits Times* (English-language), *Lianhe Zaobao* (Chinese), *Berita Harian* (Malay), and *Tamil Murasu* (Tamil). In 2023, it said some employees left or were asked to leave after an internal audit found that the organisation had inflated its circulation rates by about 10 to 12% between 2020 and 2022.[116] The government had previously made a commitment of S$900 million (US$681m) to support SMT's digital transition, to be paid over five years; it later confirmed the funding would not be affected by the circulation scandal. TV and radio operator Mediacorp, owned by the government through investment company Temasek, saw falls in usage in our data as audiences' preferences move towards online media.

Facebook continues to face a decline (36%), while YouTube (30%), Instagram (19%), and TikTok (12%) were able to grow as platforms for news. WhatsApp remains the most used social app for news (38%).

In September 2022, news site The Online Citizen went back online, a year after taking down its website and social media pages after the government suspended its licence for refusing to declare its funding sources. Its editor relocated and now supposedly publishes the website from Taiwan.[117] The government insisted that the site was still subject to the POFMA regulations, and the following month issued a correction notice to the site, asking it to correct an article it published about Singapore housing board's supposed budget deficits. The site's readership remains low, with 11% saying they access it weekly. Trust in the brand (38%) also remains lower than that of mainstream news outlets.

Edson Tandoc Jr. and **Matthew Chew**
Wee Kim Wee School of Communication and Information, Nanyang Technological University, Singapore

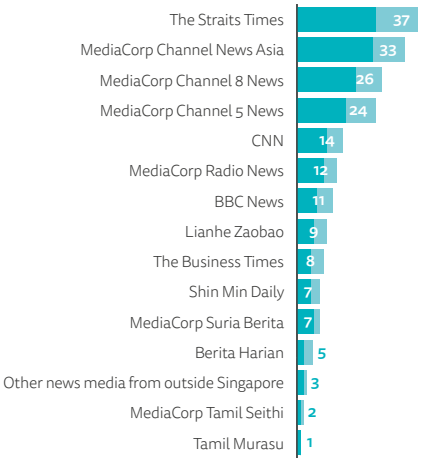
[115] https://www.straitstimes.com/singapore/politics/tiktok-added-to-list-of-internet-companies-with-additional-pofma-responsibilities
[116] https://www.straitstimes.com/singapore/senior-sph-media-staff-taken-to-task-or-have-left-company-after-review-finds-issues-with-circulation-data
[117] https://www.channelnewsasia.com/singapore/online-citizen-website-facebook-instagram-reactivated-editor-terry-xu-relocate-taiwan-2942936

WEEKLY REACH OFFLINE AND ONLINE

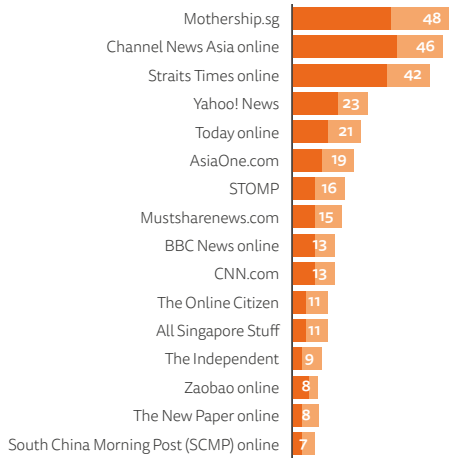
TOP BRANDS
% Weekly usage

- 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



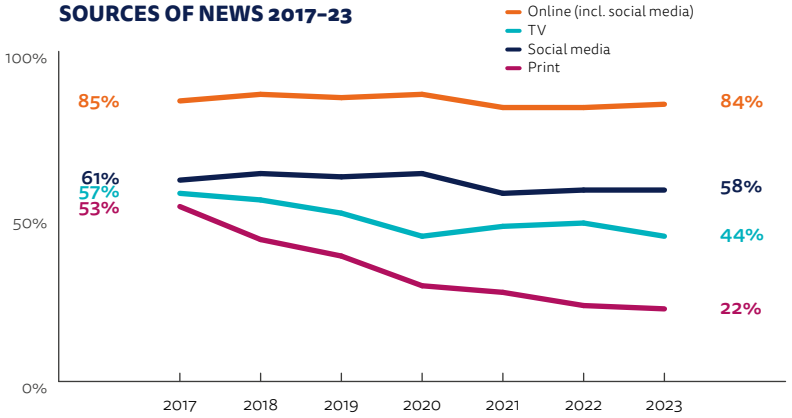
ONLINE



CHANGING MEDIA

Online and social media remain the most common ways of accessing news in Singapore, while both TV and print have declined significantly over the last few years. Most survey participants do not pay for news, with only 15% saying they do so.

SOURCES OF NEWS 2017–23



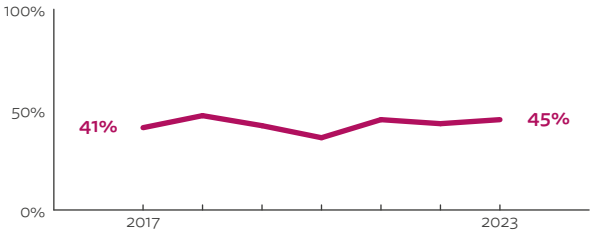
15% pay for **ONLINE NEWS**

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

TRUST

Mainstream outlets remain as the most trusted news brands, and overall trust remains stable at 45%. Mediacorp's Channel NewsAsia (75%) and Channel 5 (73%) and SMT's *The Straits Times* (73%) remain the most trusted brands, all gaining 3pp from 2022. Despite its popularity, Mothership still lags, seeing a slight decrease in its brand trust (52%).

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

45%
OVERALL TRUST
12/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023 — Score: **47.88** — **129**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
All Singapore Stuff	36%	43%	20%
BBC News	65%	27%	8%
CNN	66%	24%	9%
Lianhe Zaobao	61%	28%	11%
MediaCorp Channel 5 News	73%	20%	7%
MediaCorp Channel 8 News	70%	22%	7%
MediaCorp Channel News Asia	75%	20%	6%
MediaCorp Radio News	68%	24%	8%
Mothership.sg	52%	34%	14%
Shin Min Daily	55%	31%	14%
The New Paper	59%	29%	12%
The Online Citizen Asia	38%	42%	21%
The Straits Times	73%	19%	8%
Today online	65%	27%	8%
Yahoo! News	54%	34%	12%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

34%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	WhatsApp	38%	(-1)	83%
2	Facebook	36%	(-3)	62%
3	YouTube	30%	(+2)	71%
4	Instagram	19%	(+2)	50%
5	Telegram	18%	(-)	42%
6	TikTok	12%	(+5)	29%

Population	51m
Internet penetration	97%

SOUTH KOREA



South Korea's media ecosystem is characterised by strong broadcasters, a newspaper sector struggling to adapt to digital change, and low trust in the news. Powerful Korean-owned portals dominate the distribution of news online but media companies are trying to change that by experimenting with new business models and formats.

News organisations and CEOs, in their New Year speeches, have increasingly been using the phrase 'post-portal' to describe a world where they are less dependent on third-party aggregators such as Naver and Daum. Media companies and academics have been discussing the possibility of setting up an alternative portal that would offers similar levels of convenience but better incentives for quality journalism to thrive.

One key challenge to any such plan is the low level of audience trust in the news media, which is among the lowest in our global survey at just 28%. Detailed Korea Press Foundation (KPF) research, based on a survey of 60,000 people, has also shown that the news media score consistently badly for concepts like trust and fairness, but do a bit better in terms of perceived independence and also the influence that the news media have on society. Respondents gave particularly low marks to the performance of the Korean media in representing the socially underprivileged, monitoring the government and public figures, and keeping an eye on corporate activities.[118]

Media outlets continue to experiment with paid subscription models – as well as short-form video production – to better respond to changing audience and business trends. After the two major newspapers – *Chosun Ilbo* and *JoongAng Ilbo* – introduced 'login wall' in 2021, *Korea Economic Daily* and broadcaster SBS also jumped on the bandwagon. In October 2022, *JoongAng Ilbo* rolled out a full-fledged paid premium subscription model titled The JoongAng Plus. The 'newspaper of record' is pushing for a dual-track strategy where general news remains distributed through portals free of charge, while premium content is offered only through paid subscriptions.

Other newspapers such as *Maeil Business Newspaper*, *Kyunghyang Shinmun*, and *Hankook Ilbo* are reviewing paid subscription models while closely watching *JoongAng Ilbo*'s move.

Meanwhile, a host of media outlets, especially TV networks with a competitive edge in video content, are investing heavily in short-form video news for TikTok and other social media platforms. Only a small proportion (4%) use TikTok for news, despite the strong attention it draws outside Korea. But short-form video is also being strongly promoted by YouTube, which has grown rapidly in recent years as a news platform. Over half our sample use YouTube (53%) for news each week – up 9 percentage points on last year.

The big TV news networks, YTN, KBS, SBS, MBC, and JTBC, all produce bespoke video for social platforms where reporters explain news items that are likely to attract the attention of the younger generation with a more informal and lighter tone. On other occasions they re-edit television content on topics ranging from accidents and disasters to politics. Newspapers have been slower to invest as they often lack video production and editing skills.

On the evening of 29 October 2022, a number of Halloween partygoers squeezed into a narrow alley in the Itaewon neighbourhood of Seoul, resulting in a deadly crowd crush. In a previous disaster – when the Sewol ferry sank in 2014 and many people were killed – Korean media reported wrongly that 'all passengers have been rescued'. This resulted from the media's practice, at the time, of uncritical reporting of government or company statements without fact-checking.

In the wake of the disaster, media organisations such as the Journalists Association of Korea drew up a set of guidelines for reporting disasters. In the case of the Halloween accident, research shows that the media were seen to have improved their practices by mostly refraining from intruding excessively on the privacy of victims or showing overly graphic images or videos. However, some local media were criticised for sensational and provocative coverage of the initial stages of the crowd crush. The Korea Press Ethics Commission gave an official warning to some media outlets for repeatedly showing graphic scenes of the crowd crush, including videos of people performing CPR on the victims.

The Itaewon accident has also highlighted the psychological damage that journalists who witness traumatic scenes can suffer in the course of field reporting. Some reporters covering the disaster have complained of health problems since the incident and the Journalists Association of Korea has been offering extra advice and psychological support.

Hyunwoo Lee
Senior Researcher, Korea Press Foundation

[118] Korea Press Foundation, *Media Users in Korea 2022*. https://www.kpf.or.kr/synap/skin/doc.html?fn=1675144529256.pdf&rs=/synap/result/research

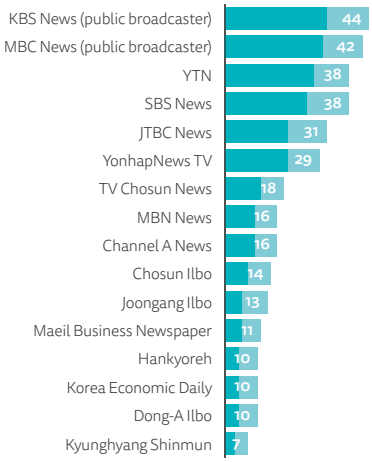
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

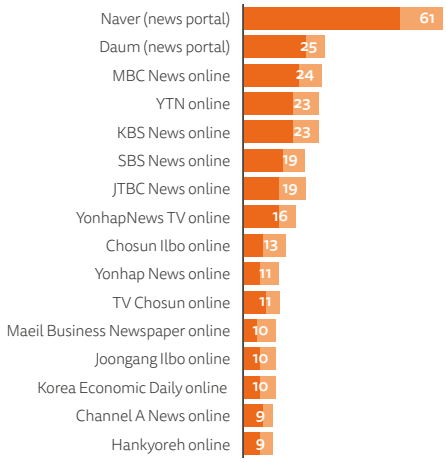
% Weekly usage

- 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

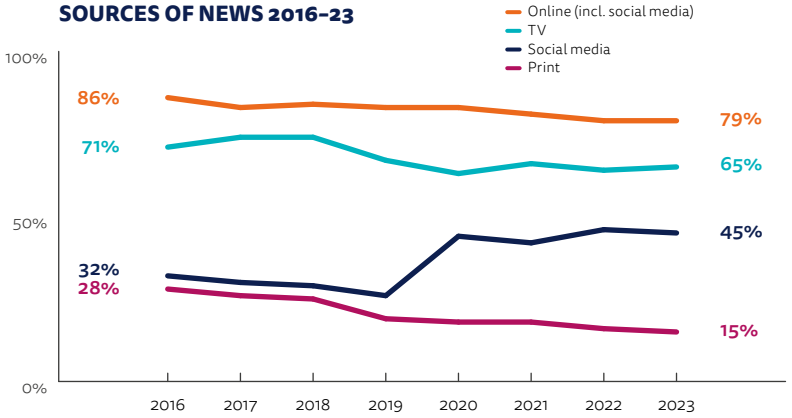


CHANGING MEDIA

News consumption in Korea is mostly reliant on online portals such as Naver and Daum, as well as a competitive broadcast sector, with print media becoming less influential over time. Social video platforms such as YouTube have become much more important for the discovery and consumption of news.

11% pay for **ONLINE NEWS**

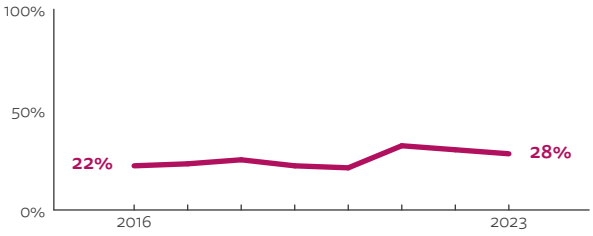
SOURCES OF NEWS 2016–23



TRUST

Koreans' trust in the news has been stuck at a low level, with just 28% of respondents saying that they 'trust most news most of the time'. The most trusted individual news brand was MBC, one of the public broadcasters in South Korea, which showed a significant year-on-year increase. This was followed by other major broadcasters, such as YTN, KBS, SBS, and JTBC. Most major newspapers have lower levels of trust.

OVERALL TRUST SCORE 2016–23



Proportion that trusts 'most news most of the time'

28% **OVERALL TRUST =41/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **70.83** **47**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Channel A News	39%	29%	32%
Chosun Ilbo	33%	26%	40%
Dong-A Ilbo	35%	31%	34%
Hankyoreh	40%	32%	28%
Joongang Ilbo	36%	32%	32%
JTBC News	52%	29%	19%
KBS News	55%	27%	19%
Kyunghyang Shinmun	37%	37%	25%
MBC News	58%	23%	20%
MBN News	39%	35%	27%
Regional or local newspaper	35%	40%	25%
SBS News	53%	29%	18%
TV Chosun News	36%	25%	39%
YonhapNews TV	48%	31%	21%
YTN	55%	28%	17%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

25% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	YouTube	53%	(+9)	77%
2	Kakao Talk	22%	(-2)	69%
3	Instagram	12%	(+1)	40%
4	Facebook	10%	(-4)	27%
5	Twitter	4%	(-2)	12%
6	TikTok	4%	(+1)	10%

Population	24m
Internet penetration	95%

TAIWAN



Tensions with China reached a new pitch in the past year, putting the media on an emergency footing. Taiwan has a lively and combative media but there are differences in opinion on how to tackle misinformation, not only between political parties but also between pro-independence and pro-unification media.

As the war in Ukraine continued, tensions in the Taiwan Strait were heightened with worries that China might follow Russia's lead. Nearly 200 foreign officials visited Taiwan in 2022 to discuss how to contain Chinese ambitions. Following the visits, China stepped up its display of military force, as it pressed its claim to sovereignty over democratically governed Taiwan. Undersea cables linking Taiwan and its outlying Matzu islands near China were severed by Chinese fishing boats. Chinese radio stations also aired messages encouraging Taiwanese to work in China and promoting unification.

Following the October 2022 visit of Nancy Pelosi, then speaker of the US House of Representatives, a large number of cyberattacks were carried out on Taiwanese government websites.[119] TV displays in some railway stations were hacked to show messages such as 'The great China will eventually be reunited'. These tactics extended to the media. Formosa TV, a pro-independence news channel, reported a series of cyberattacks. Its websites and YouTube streams were hacked to show pro-Beijing statements including 'China's terrestrial sovereignty cannot be interfered by outsiders'.

In response, the Taiwanese Ministry of Defence proposed to revise a national mobilisation act, saying there was a need to manage false information in time of emergency. According to the proposal, once mobilisation was mandated, all media would have to co-operate with government orders and penalties for spreading misinformation would be increased.

While pro-independence publications such as *Liberty Times* supported the plans, pro-unification media such as *United Daily* warned that the ruling party might abuse the emergency regulations to suppress press freedom in peacetime.[120] Opposition parties blocked the proposals as a result.

Efforts at countering misinformation are not limited to the government though. The Taiwan Fact Checking Center, led by journalists, publishes dozens of fact-checks a week on issues ranging from consumer scares to geopolitical propaganda. Other agencies are stepping up efforts to increase media literacy and have invited citizens to take part. Watchout, an independent media organisation, produces handbooks on how to spot disinformation in a crisis. In October 2022, the founder of Taiwan's second-largest chipmaker, Robert Tsao, pledged US$20m to provide training to citizens in open-source intelligence and cybersecurity.

The public broadcaster, Taiwan Broadcasting System (TBS), whose Public Television Service (PTS) news brand is among the country's most trusted, has put itself on high alert to prevent being hacked and to strengthen its operational resilience. It is also expanding and improving its output, including its subscription video-on-demand service PTS+, hoping to make it the most popular local platform for artistic and cultural performances. It has also launched the country's first English-language TV channel, TaiwanPlus, a venture supported by the Ministry of Culture as part of its mission is to share the country's perspective internationally. The hope is that the new channel, which TBS hopes to make available in the United States, might help to counter the impact of Beijing's English-language China Global Television Network (CGTN).

In a crowded market – there are already 19 24-hour news channels in Taiwan, mostly privately owned – only the Chinese Television System is public. It has made a lot of effort to improve its quality in order to obtain one of the prime positions on cable TV's electronic programme guides. Commercial operators have suffered from a continuing loss of income, even though Taiwan's economic growth is strong and digital advertising revenue rose by nearly 10% in 2021. Newspaper advertising income fell by more than 30%, which has worried many about the ability of Taiwanese media to resist Chinese influences. A report by Freedom House said some Taiwanese publications were publishing content arranged, sponsored, or paid for by Chinese authorities.[121]

Facing declining income, Taiwan's publishers have got together to lobby the government to help them in negotiations with Meta, Google, and others, arguing that platform operators receive around 80% of the digital advertising revenues in Taiwan without appropriately compensating those that produce the content. The platforms say they gain few profits from news but already make contributions to local journalism. In March 2023, Google launched a US$10m three-year programme to help news providers with digital transformation.

Lihyun Lin
National Taiwan University

[119] https://www.reuters.com/technology/website-taiwans-presidential-office-receives-overseas-cyber-attack-source-2022-08-02/
[120] *Liberty Times*, 10 Mar. 2023. 'Editorial: Strengthening National Defense'. https://talk.ltn.com.tw/article/paper/1571167. *United Daily*, 26 Feb. 2023. 'Editorial, National Mobilization Act: Military Rule'. https://udn.com/news/story/6656/6996779
[121] A. Datt, J-N Huang. 2022. *Beijing's Global Media Influence Report, Taiwan.* https://freedomhouse.org/country/taiwan/beijings-global-media-influence/2022

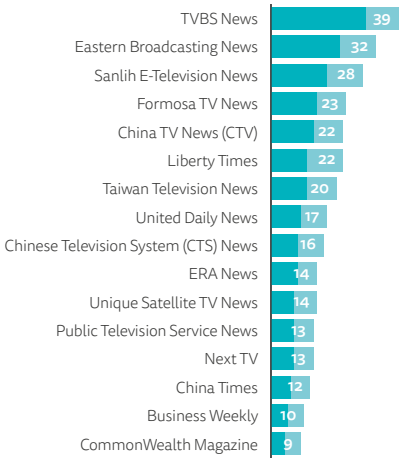
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

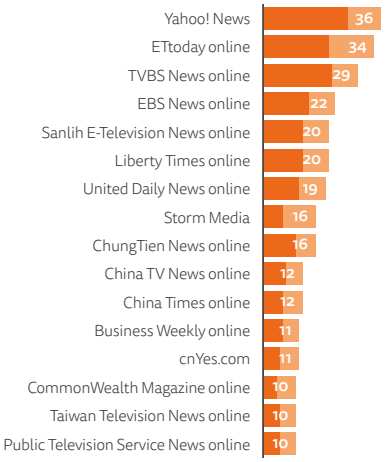
% Weekly usage

- 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

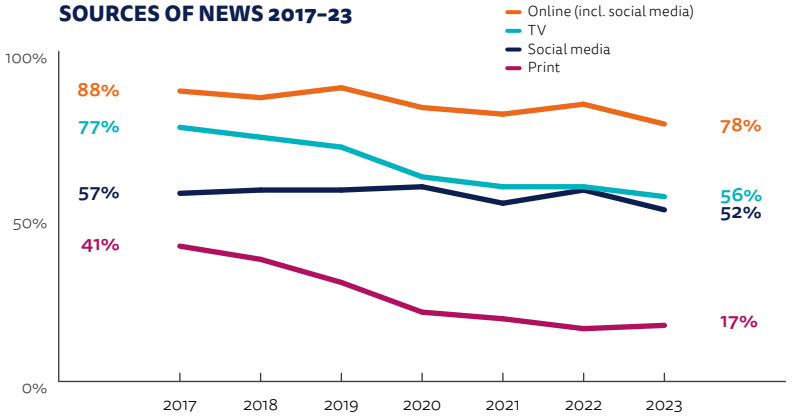


CHANGING MEDIA

Traditional media sources such as television and print have become less important over time while digital news consolidates its position. More and more Taiwanese use YouTube for news – from 38% in 2021 to 44% in 2023 – with most news channel operators now uploading videos there.

13% pay for **ONLINE NEWS**

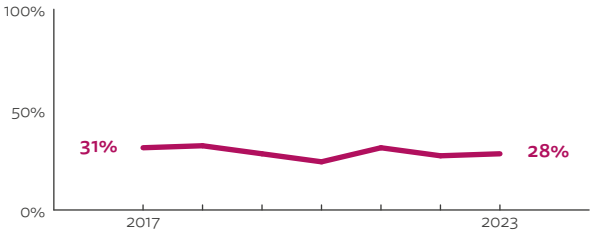
SOURCES OF NEWS 2017–23



TRUST

Due to the intense competition in the media market and the interventions of owners, trust in news (28%) remains among the lowest in our survey. In the polarised media landscape, many brands with political colours are less trusted, whereas business publications tend to have higher levels of trust. PTS (55%) remains one of the most trusted brands this year, after internal improvements.

OVERALL TRUST SCORE 2017–23



Proportion that trusts 'most news most of the time'

28% **OVERALL TRUST** **=41/46 markets**

WORLD PRESS FREEDOM INDEX SCORE 2023 Score: **75.54** **35**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Business Weekly	55%	36%	10%
China TV (CTV) News	45%	39%	16%
Chinese Television System (CTS) News	42%	41%	17%
CommonWealth Magazine	54%	37%	9%
EBC News	46%	40%	14%
Economic Daily	51%	40%	9%
Ettoday.net	46%	39%	14%
Formosa TV News	38%	35%	27%
Liberty Times	38%	36%	26%
Public Television Service (PTS)	55%	35%	11%
Sanli News	35%	35%	30%
Storm Media	34%	42%	23%
TTV News	45%	41%	14%
TVBS News	51%	37%	12%
United Daily	45%	41%	14%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

31% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Line	47%	(-2)	71%
2	YouTube	44%	(+4)	71%
3	Facebook	41%	(-4)	63%
4	Instagram	10%	(+1)	31%
5	PTT (bulletin board)	7%	(-)	15%
6	Facebook Messenger	6%	(-)	27%

Population	70m
Internet penetration	88%

THAILAND



General elections in May 2023 were seen as a potential turning point for Thailand and for media freedom after decades of authoritarian rule. The poll was the first since youth-led protests in 2020 shook Thailand's establishment by calling for the powers of the monarchy to be curbed, and for the military-backed constitution to be rewritten.

Thailand's reformist opposition won the most seats and the largest share of the popular vote in May's elections with young voters in particular sending a clear message for change – along with a rejection of military-backed parties that have ruled Thailand for nearly a decade. But it remains unclear whether opposition parties will be allowed to carry out their radical programme, given the hold that conservative voices still hold in the wider political system and through the media.

The shock success of the reformist Move Forward party, which secured the largest number of seats, was largely due to an imaginative social media-based campaign that appealed to younger voters in particular and offered a different kind of political leadership. The election period also saw intense coverage of dysfunction in public services as well as executive corruption.

Outside election periods the mainstream media tend to be constrained in terms of critical reporting – with major outlets often reporting the government line. Newer outlets like Voice TV have tried to provide more alternative views, which in turn has led to harassment by the authorities over the last few years. According to Reporters Without Borders (RSF), defamation and cybercrime laws are systematically used in Thailand to harass journalists, and the government also has the power to suspend the licences of media outlets that threaten 'public decency'.[122] Smaller and online media outlets tend to be given more leeway and many former journalists now create and distribute news content via platforms like YouTube, building personal brands for themselves in the process. During the COVID-19 pandemic reliable news was often to be found on Facebook pages reflecting what was happening in local communities, but these have expanded into a range of genres in widely read forums such as Saved Sai Mai Page (social welfare), Watch Dog Page (corruption), and Drama Addict Page (social dramas).

The Thai public has a voracious appetite for sensationalist news stories including true crime and supernatural beliefs, 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 – though the most reputable news outlets, we find, tend to conduct additional investigations and interviews of their own.

Self-censorship about the Thai monarchy is heavily practised, not least because journalists face the threat of up to 15 years in prison if they breach the penal code. For this reason, a serious scare around the health of the King's daughter was largely ignored by most news organisations, beyond the bland official statements from the palace. By contrast the rumours about her possible death were widely shared and discussed in every social media platform. The royal succession remains a matter of intense interest and has the potential to derail the nation's stability.

News reporting and soap operas are the Thais' top favourite programmes, as evidenced by increased advertising airtime on OTT TV and streaming services. Short-form videos on Facebook, YouTube, and TikTok are also gaining more attention and importance, and most news organisations – if not all – with online access have presences on all three networks.

TikTok usage has grown again this year with half of our sample (51%) using the short-form video network for any purpose and 30% for news consumption – up 8 percentage points on last year. Younger Thais have embraced the platform while other news consumers consume longer video formats via YouTube. Our survey this year confirms that Thais prefer to watch the news online rather than read it or listen to it – one of the few countries to show that trend. This is making it even harder for newspapers with a print background to engage audiences via their websites and apps.

Advertising remains the main business model for news publishers, with a heavy payload of advertisements on websites, and product placement is widely practised on TV news programmes. Print advertising is in decline along with circulation. Paying for online news through subscriptions is extremely rare in Thailand.

The merger of telecom giants True and DTAC in 2023 may have significant implications for the media sector and access to popular news services. Until now healthy competition has led to cheap and unlimited data packages, which in turn have driven the popularity of OTT platforms – including news streaming services. It remains to be seen if that will change as a result of the merger.

Professor Jantima Kheokao
Asian Network for Public Opinion Research (ANPOR)
Dhanaraj Kheokao
Potsdam University, Germany

[122] Reporters Without Borders, Thailand page. https://rsf.org/en/country/thailand

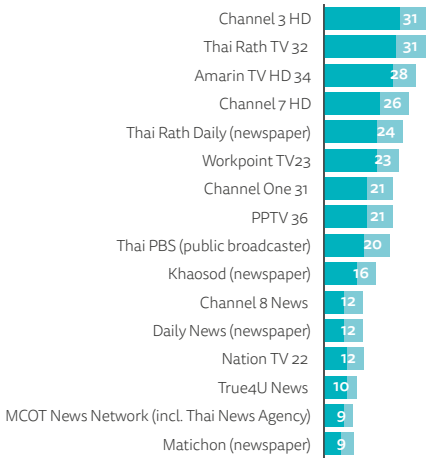
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

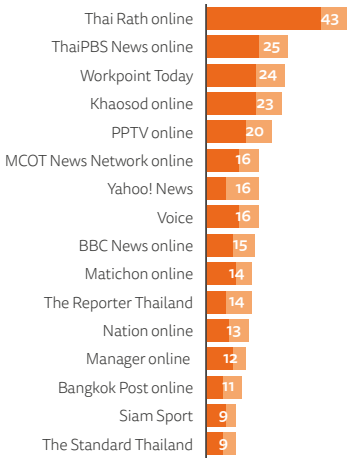
% Weekly usage

- 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



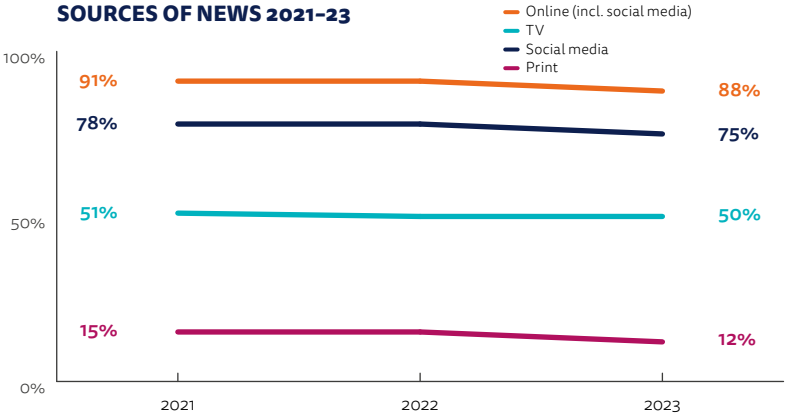
ONLINE



CHANGING MEDIA

Although television remains an important source of news for older Thais, others rely heavily on online and social media sources for news. The most important social media platforms for news include Facebook, YouTube, Line, and TikTok.

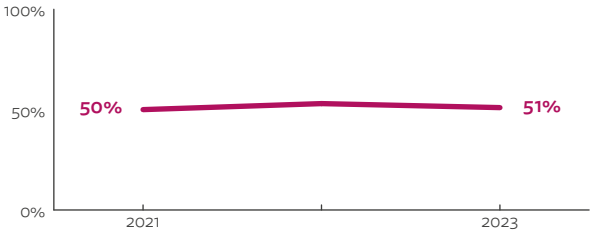
SOURCES OF NEWS 2021–23



TRUST

Trust in the news remains stable and relatively high compared with other countries (9th/46) – as do the trust scores for individual news brands. TV channels such as Channel 7 HD News and the PSB Thai TBS tend to have higher levels of trust when compared with newspapers.

OVERALL TRUST SCORE 2021–23



Proportion that trusts 'most news most of the time'

51%
OVERALL TRUST
9/46 markets

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2023**

Score: **55.24**

106/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Amarin	69%	23%	8%
Bangkok Post	65%	28%	7%
Channel 7 HD	71%	23%	6%
Daily News	64%	28%	8%
Khaosod	65%	26%	9%
Krobkruakao 3	65%	27%	7%
Manager	60%	31%	9%
Matichon	66%	25%	9%
MCOT News Network	68%	25%	6%
Nation	59%	26%	15%
PPTV	68%	26%	6%
Regional or local newspaper	60%	31%	8%
Thai PBS (public broadcaster)	70%	22%	7%
Thai Rath	69%	24%	8%
Workpoint TV	71%	23%	7%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

43%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	65%	(-1)	80%
2	YouTube	54%	(-1)	80%
3	Line	48%	(-3)	75%
4	TikTok	30%	(+8)	51%
5	Twitter	22%	(+1)	34%
6	Facebook Messenger	21%	(-2)	46%

SECTION 3



SECTION 3

Analysis by Country and Market
Africa

AFRICA		
3.44	Kenya	150
3.45	Nigeria	152
3.46	South Africa	154



Population	**56m**
Internet penetration	**85%**

KENYA



Kenyan media are considered to be independent by regional standards, but press freedom remains fragile. Last year's presidential elections also highlighted the challenge from widespread political misinformation and disinformation through multiple social networks and messaging apps, despite laws designed to limit its spread.

The country's fragile and polarised political environment and the tensions that follow presidential elections often determine the perceived credibility and reliability of the media. Yet, trust in the news grew by 6 percentage points this year, perhaps because it acts as an important counter to a rising tide of misinformation and disinformation. The growing appropriation of WhatsApp and Facebook as information-sharing platforms has raised serious concerns about the quality of information during a year dominated by elections and the subsequent challenge of the presidential outcome. Increased efforts by fact-checkers such as AfricaCheck, Fumbua Trust, PesaCheck, and others to spotlight the misinformation on WhatsApp and Facebook may also help explain why their use as a source of news declined.

The election period coincided with rapid growth in the use of TikTok for news, up 14pp in the last year, according our survey. The platform – usually known for sharing dancing and make-up videos – became the network of choice for political mercenaries during the elections according to a report by the non-profit Mozilla foundation.[123] Fake polls and videos were widely shared and the platform was widely criticised for lack of effective content moderation, allowing millions of people to engage with content that was intentionally misleading or even incited violence.

Although guaranteed by the constitution, respect for press freedom and free expression in Kenya are constrained by political and economic realities. The current political administration that came to power after the 2022 elections regularly claims that the media are biased against them. Physical attacks on journalists and the increase in online threats, harassment, and intimidation have had a chilling effect. Media houses are also under pressure, with the Communications Authority of Kenya, which is in charge of licensing and regulating broadcast media, threatening to revoke the licences of media outlets that report on anti-government protests organised by the opposition. These threats alongside non-payment of money (an estimated US$17m are owed for advertising services already rendered) have often led to the once robust media kowtowing to government and political-elite pressure.

For most Kenyans, free-to-air digital terrestrial TV remains the most popular medium – with radio also reaching a significant proportion of the population via more than 100 licensed stations in multiple languages. Media ownership is concentrated among the political elite, reinforcing the perception that the media are 'captured' by political and corporate interests to the detriment of their public interest role. A small number of large groups including the Nation Media Group, The Standard Group, Radio Africa Group (Star+), and the Royal Media Services Group (Citizen TV, Citizen Radio, etc.), dominate the landscape. In the online space, the digital native Tuko's mix of celebrity, entertainment, and political news with a light touch has proved successful.

But there are deepening concerns for the sustainability of the sector as media organisations contend with a poor economic environment and the aftermath of the COVID-19 pandemic. Layoffs continue and the welfare of the journalists remaining in the newsroom has worsened as the working conditions deteriorate and salaries are delayed. A number of news organisations have shuttered loss-making products. For example, the Radio Africa Group closed its entertainment-only TV station Kiss TV.

Some media houses' attempts to develop alternative revenue streams have run into trouble. The Nation Media Group dismantled its paywall when it had an estimated 70,000 subscribers which had earned the company more than US$ 470,000. The subscription numbers for *The Standard* and *The Star*, which still have their paywalls, are way below those of the NMG. Media organisations seem to be in paralysis – afraid to suspend paywalls which are not gaining traction or afraid to reintroduce them without making the significant investment needed to produce distinct and valuable content that would justify charging for content. The declining financial health of many media houses has prompted discussions about establishing a Media Fund to assist news organisations to stay afloat. But the prospect of using public money to support commercial, 'independent', yet recalcitrant media at a time of economic hardship for ordinary people would be extremely hard to deliver politically.

All the big Kenyan media groups have been investing in the production of original podcasts. Although they are often cheap to produce, there are few indications that they are attracting significant audiences. Furthermore, many podcasts are of a similar genre (lifestyle, entertainment, or sports) and most do not contain news or analysis and may not have contributed to improving the quality or diversity of political discourse.

Catherine Gicheru
ICFJ Fellow and *Director, Africa Women Journalism Project*
George Nyabuga
Associate Professor of Media and Journalism, Aga Khan University's Graduate School of Media and Communications

[123] https://www.businessinsider.com/research-on-tiktok-political-disinformation-around-kenyan-elections-2022-6

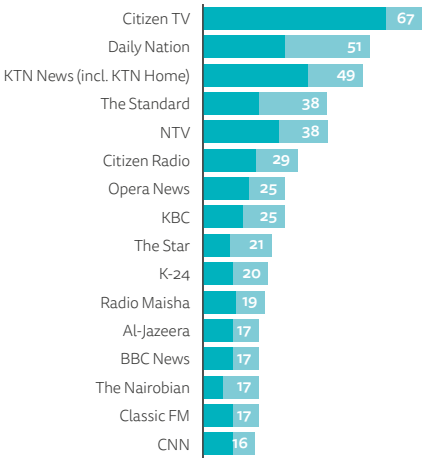
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

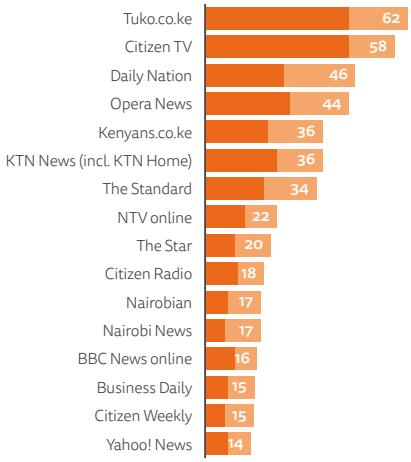
% Weekly usage

- **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



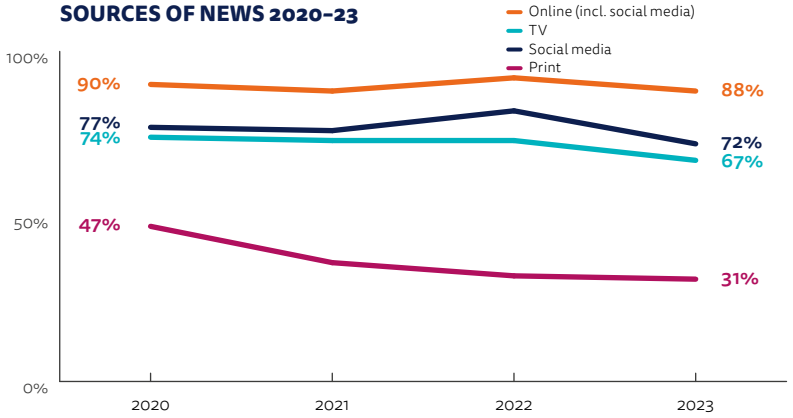
ONLINE



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.

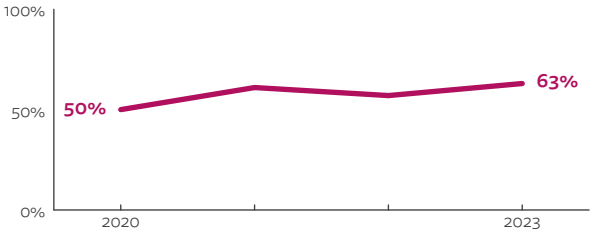
SOURCES OF NEWS 2020–23



TRUST

Trust in news overall (63%) 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. The BBC also has a strong presence in the Kenyan market with high trust scores. Popular papers such as *The Star* and *The People Daily* have slightly lower trust.

OVERALL TRUST SCORE 2020–23



Proportion that trusts 'most news most of the time'

63%
OVERALL TRUST
2/46 markets

REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2023	Score: 51.15	116/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
BBC News	87%	6%	8%
Citizen Radio	86%	6%	8%
Citizen TV	89%	5%	6%
Daily Nation	89%	5%	6%
K-24 TV	83%	9%	8%
KBC News (public broadcaster)	84%	7%	9%
KTN News	89%	5%	6%
NTV	88%	5%	6%
Radio Jambo	79%	11%	10%
Radio Maisha	81%	9%	10%
Taifa Leo	79%	10%	11%
The Business Daily	83%	9%	8%
The People Daily	77%	11%	13%
The Standard	87%	6%	7%
The Star	74%	11%	15%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

57%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	61%	(-3)	73%
2	WhatsApp	60%	(-1)	83%
3	YouTube	51%	(-1)	76%
4	Twitter	40%	(+4)	52%
5	Instagram	29%	(-)	52%
6	TikTok	29%	(+14)	54%

Population	**211m**
Internet penetration	**73%**

NIGERIA



Nigeria's media landscape remains a dynamic and constantly evolving space with state and private broadcasters, popular international brands like the BBC and CNN, and numerous print titles. Traditional media outlets in the country are embracing new digital formats and channels, as they transform their legacy businesses.

As fewer people turn to traditional news sources such as television and print media for information, their business models have come under pressure. Print, in particular, has been in sharp decline in recent years with a further 5 percentage point drop in weekly reach in our data. Despite these problems, there are still around 100 national and local print titles, of which the best known include *The Punch*, *The Nation*, *Vanguard*, *The Guardian* and *The Premium Times*.

Television and radio remain critical sources of information, especially for those that are not online, but internet access is growing fast. Nigeria hit 122.5 million internet users as of January 2023, according to DataReportal, and Nigerians have been quick to adopt a wide range of social media platforms. Meta-owned products such as Facebook and WhatsApp remain most widely used for news, followed by Twitter and YouTube. The messaging service Telegram has grown rapidly in recent years and Nigeria's youthful population is now vigorously embracing short-form video via TikTok – accessed by 56% of 18–24s, according to our Digital News Report survey, with around half of these now accessing news on the platform.

Some Nigerian media organisations such as *Business Day*, *Daily Post*, HumAngle, *The Guardian*, *The Punch*, and *ThisDay* have been innovating their product offerings including the introduction or extension of premium subscription services. As well as full access to digital content these often include exclusive newsletters and other subscriber-only content. It is not clear how many people have taken up these paid services with so much free news available. Meanwhile, the size of the Nigerian market has been attracting interest from international venture capital with Stears Business raising $3.3 million for a data start-up and Big Cabal Media raising $2.3m to build and extend new content verticals. This demonstrates potential new avenues for media funding in Nigeria.

The rise of digital journalism continues apace, with podcasts becoming increasingly popular across a number of genres. Email newsletters are being widely deployed to increase engagement with websites, and platforms such as Substack have also made it easier for individual journalists to launch stand-alone newsletters.

Hotly contested presidential elections in Nigeria in February 2023 passed off largely peacefully but turnout was affected by fuel shortages, insecurity, and evidence of voter suppression in some parts of the country. Election rallies and political speeches were widely covered by the media but questions linger regarding the objectivity of some news coverage, considering that traditional media outlets are heavily dependent on political (and government) advertising.

Despite the evolution of the media sector, the pursuit of press freedom, as enshrined in the constitution, remains elusive. The government arrested and detained several journalists and publishers in the run-up to the election for publishing reports deemed offensive. Those affected include Haruna Mohammed, publisher of WikkiTimes, Ayodele Samuel, the publisher of Taraba Truth and Facts, and Agba Jalingo, publisher of Cross River Watch, while others were physically assaulted.

Misinformation was rampant on social media before, during, and after the election according to experts monitoring the campaign. In an effort to combat the problem, a new initiative was set up by major news platforms and civil society organisations working together under the umbrella of the Nigeria Fact-checking Coalition (NFC). Participants included the International Centre for Investigative Reporting (ICIR), Dubawa, Africa Check, FactMattersNG, the Insight, FactCheckHub, TheCable, and *Daily Trust* and the group was active in fact-checking live presidential debates and set up an Election Observatory Room to monitor misinformation and disinformation in the months leading up to the election.

In recent years, several laws regulating social and other digital media have been proposed by the government, in the face of international and local criticism about the wider potential impact on freedom of speech and on journalists' ability to operate. Partly as a result, a number of stakeholders have been exploring new ideas for how to govern information on digital platforms. The Federal Government of Nigeria has established a new Code of Practice through the National Information Technology Development Agency (NITDA) while news organisations, civil society, and non-media groups have been discussing various proposals for self-regulation.

Tolulope Adeyemo
Code for Africa

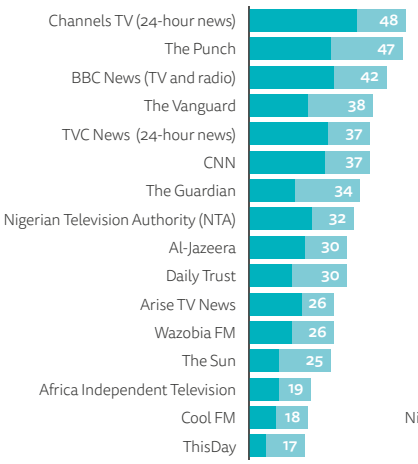
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

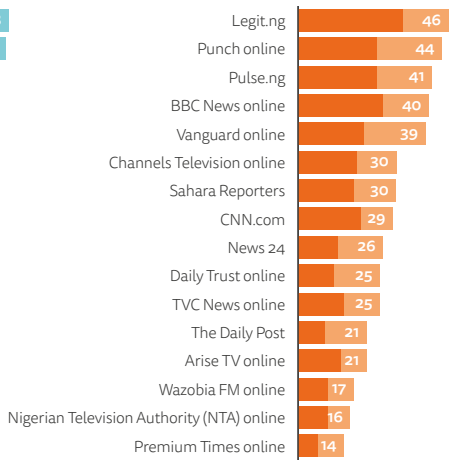
% Weekly usage

- 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



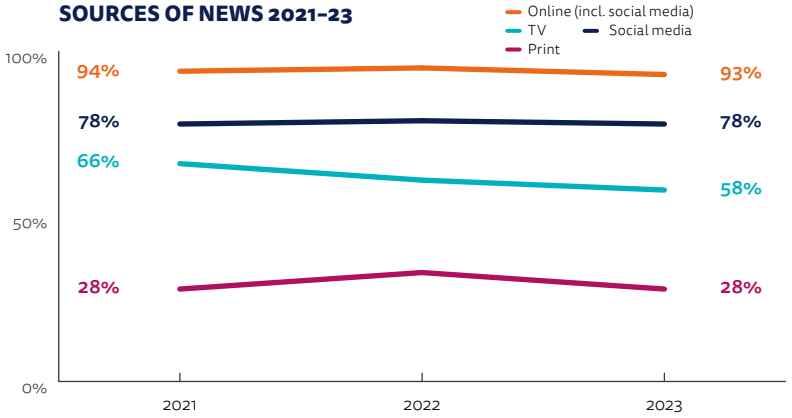
ONLINE



METHODOLOGY NOTE

These data are based on 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.

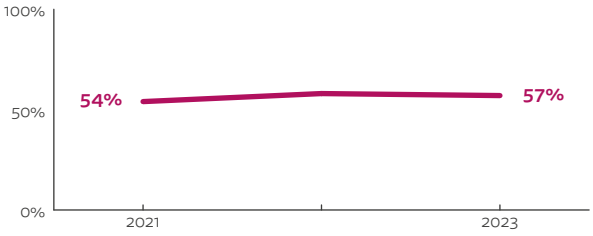
SOURCES OF NEWS 2021–23



TRUST

Nigeria's overall trust in news (57%) score has remained relatively stable over recent years and ranks fourth (4th/46) in our survey. International broadcasters such as BBC News and other local traditional media outlets such as Channels TV, *The Punch*, Arise TV News, and *The Vanguard*, among others, maintain high levels of public trust. But the level of government interference in the news media remains significant, according to RSF. It can involve pressure, harassment of journalists, and censorship.

OVERALL TRUST SCORE 2021–23



Proportion that trusts 'most news most of the time'

57%
OVERALL TRUST
=4/46 markets

WORLD PRESS FREEDOM INDEX SCORE 2023
Score: **49.56**
123/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
Africa Independent Television	78%	12%	10%
Arise TV News	82%	10%	9%
BBC News	90%	6%	4%
Channels TV	88%	6%	6%
News Agency of Nigeria	72%	15%	13%
Nigerian Television Authority (NTA)	69%	13%	18%
Premium Times	77%	13%	10%
Pulse.ng	77%	14%	9%
The Guardian	83%	10%	7%
The Nation	77%	14%	10%
The Punch	84%	9%	6%
The Sun	78%	13%	9%
The Vanguard	83%	10%	8%
ThisDay	76%	14%	10%
TVC News	79%	11%	10%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

59%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	64% (+2)	79%
2	WhatsApp	63% (+3)	87%
3	Twitter	44% (+6)	58%
4	YouTube	40% (-1)	71%
5	Instagram	36% (-4)	60%
6	Telegram	26% (-)	55%

Population	60m
Internet penetration	58%

SOUTH AFRICA



The last year has been a challenging one for South African media, including the closing of two news sites, staff of a prominent media company not having their salaries paid in full, and high-profile legal challenges involving journalism that reflect fault lines in media freedom. Perhaps related to this is that, after four years of growth, trust in news in South Africa is declining.

Due to the termination of its licensing agreement, finance news site Business Insider South Africa closed after five years of operating, although its staff were reallocated into its parent organisation, Media24. More troublingly, left-leaning news outlet New Frame, which provided a much-needed voice on social justice and labour issues, also closed down amid recriminations and accusations of political interference and mismanagement, leaving some 25 staff out of work and a significant hole in the diversity of the news landscape.[124]

In March 2023 Independent Media, owners of a number of leading national newspapers and the popular IOL website, told staff that they would only receive 75% of their salaries, which the company attributed to 'declining revenues and rising cost structures'. Commentators suggested this was more likely caused by the parent company taking a financial hit when they lost a court case with the state asset manager. Salaries were eventually paid in full, with shareholders agreeing to provide a capital injection, but this is an ominous harbinger of potential cuts to come.

In February 2023 the president of South Africa was taken to court over his failure to appoint a new board for the South African Broadcasting Corporation (SABC). NGO Media Monitoring Africa and others argued that the absence of effective oversight jeopardises the SABC's stability and has left millions of people under threat of having their 'fundamental right to access to information' denied. The president eventually appointed a board in mid-April. The results of the 2023 Digital News Report survey highlight the scale of this threat, with the SABC as the top news source for TV and radio news (52%), and second highest on the online list (50%).

In a case that the Committee to Protect Journalists says could have 'serious repercussions for freedom of the press in South Africa', ex-President Jacob Zuma sued an investigative journalist from News 24 and an advocate who Zuma claimed leaked confidential medical records. The private prosecution was widely seen as an attempt by Zuma to stop the journalist, Karyn Maughan, from reporting on his ongoing trial about corruption related to a multi-billion-dollar arms deal, with possible ramifications mooted that included damage to South Africa's open justice system and the role reporters can play in defending it. In a victory for media freedom, the court ruled in Maughan's favour, saying that Zuma's prosecution 'had the hallmarks of a SLAPP suit, designed to harass and intimidate.'

Harassment of journalists has become increasingly physical, with SANEF expressing concern at 'increasing incidents of violence against journalists around the country'.[125] In February, supporters of a political party and municipal police assaulted a reporter from the private broadcaster eNCA and, in a separate incident, a former mayor and his bodyguards attacked a reporter with the privately owned newspaper *Zululand Observer*.

Harassment of the media, both online and physically, is disproportionately directed at women journalists. This bias is reflected in the decreasing number of women editors in South Africa, which has dropped precipitously from a global high of 60% in 2021 to a paltry 20% in 2023.[126]

Print continues to decline as a source of news and TV news is also down after COVID-19 highs. Conversely, the number of people using social media for news has grown across all platforms except for Twitter, with news use via TikTok and YouTube both increasing by 7pp.

There are positive indicators, though. News sites are increasingly embracing the opportunities that platforms bring to reach new audiences. Subscriber numbers to paywalled and membership-based news sites appear to be growing, although it is difficult to find reported figures for many of them. Of those that have declared their figures, News24 is at around 75,000 subscribers, a growth of 53% year-on-year, another Media24 site, the niche Afrikaans-language Netwerk24, had over 95,500 subscribers as of September 2022, and independent news site Daily Maverick's membership scheme has 22,500 active members. Although trust in news has dipped in general, there is still a robust, trusted relationship between reputable news sites and their audiences.

Chris Roper
Deputy CEO, Code for Africa

[124] Daily Maverick, 15 July 2022. https://www.dailymaverick.co.za/article/2022-07-15-inside-the-messy-demise-of-new-frame/
[125] SANEF, 22 Mar. 2023. https://sanef.org.za/sanef-condemns-attack-on-sabc-journalists/
[126] https://reutersinstitute.politics.ox.ac.uk/women-and-leadership-news-media-2023-evidence-12-markets

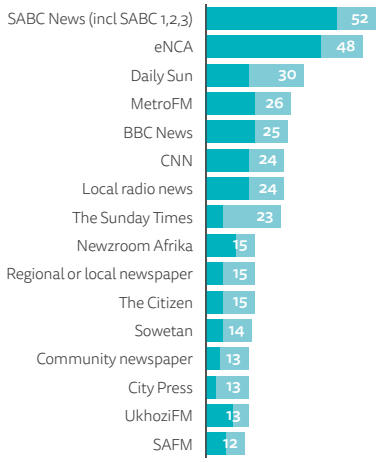
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

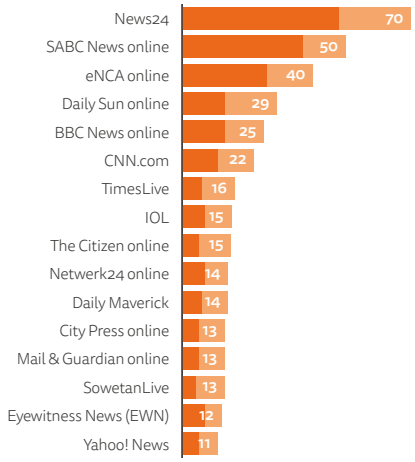
% Weekly usage

- 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



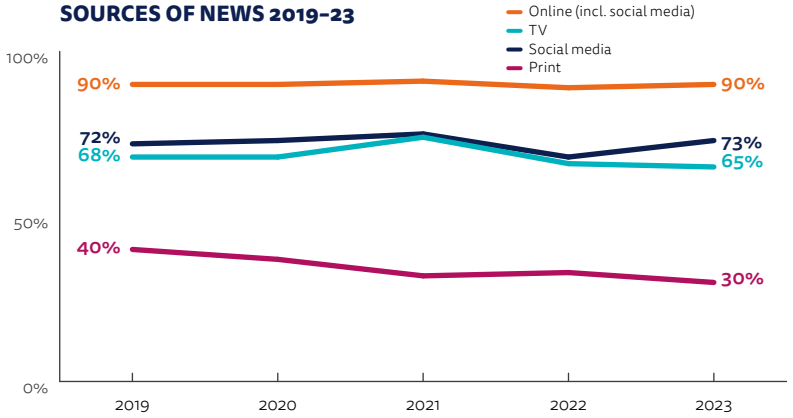
ONLINE



METHODOLOGY NOTE

These data are based on 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.

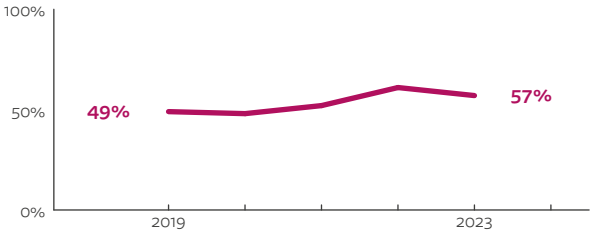
SOURCES OF NEWS 2019–23



TRUST

Trust in news (57%) remains high by international standards despite a 4pp decline in the last year. Brand trust scores have also edged slightly lower with News24 and BBC News remaining among the most trusted news organisations. South Africa has a well-established culture of fearless journalism but some elements have been compromised in recent years by a chase for ratings and, in some cases, perceptions of undue influence by powerful owners.

OVERALL TRUST SCORE 2019–23



Proportion that trusts 'most news most of the time'

57%
OVERALL TRUST
=4/46 markets

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2023** Score: **78.6** **25**/180

Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

BRAND TRUST SCORES

Only the below brands were included in the survey. It should not be treated as a list of the most or least trusted brands as it is not exhaustive.

Brand	Trust	Neither	Don't Trust
BBC News	81%	11%	8%
City Press	67%	20%	13%
Daily Maverick	63%	23%	15%
Daily Sun	53%	22%	25%
eNCA	80%	10%	9%
EWN (Eyewitness News)	68%	20%	12%
IOL	60%	24%	17%
Mail & Guardian	70%	19%	12%
News24	83%	10%	7%
Regional or local newspaper	70%	18%	12%
SABC News	79%	10%	11%
Sowetan	62%	20%	18%
Sunday Times	73%	15%	11%
The Citizen	68%	19%	13%
TimesLive	69%	19%	12%

Q6_brand 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'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

57%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	56% (+4)	76%
2	YouTube	46% (+7)	81%
3	WhatsApp	46% (+3)	83%
4	Twitter	25% (-3)	38%
5	TikTok	22% (+7)	50%
6	Instagram	17% (+1)	45%

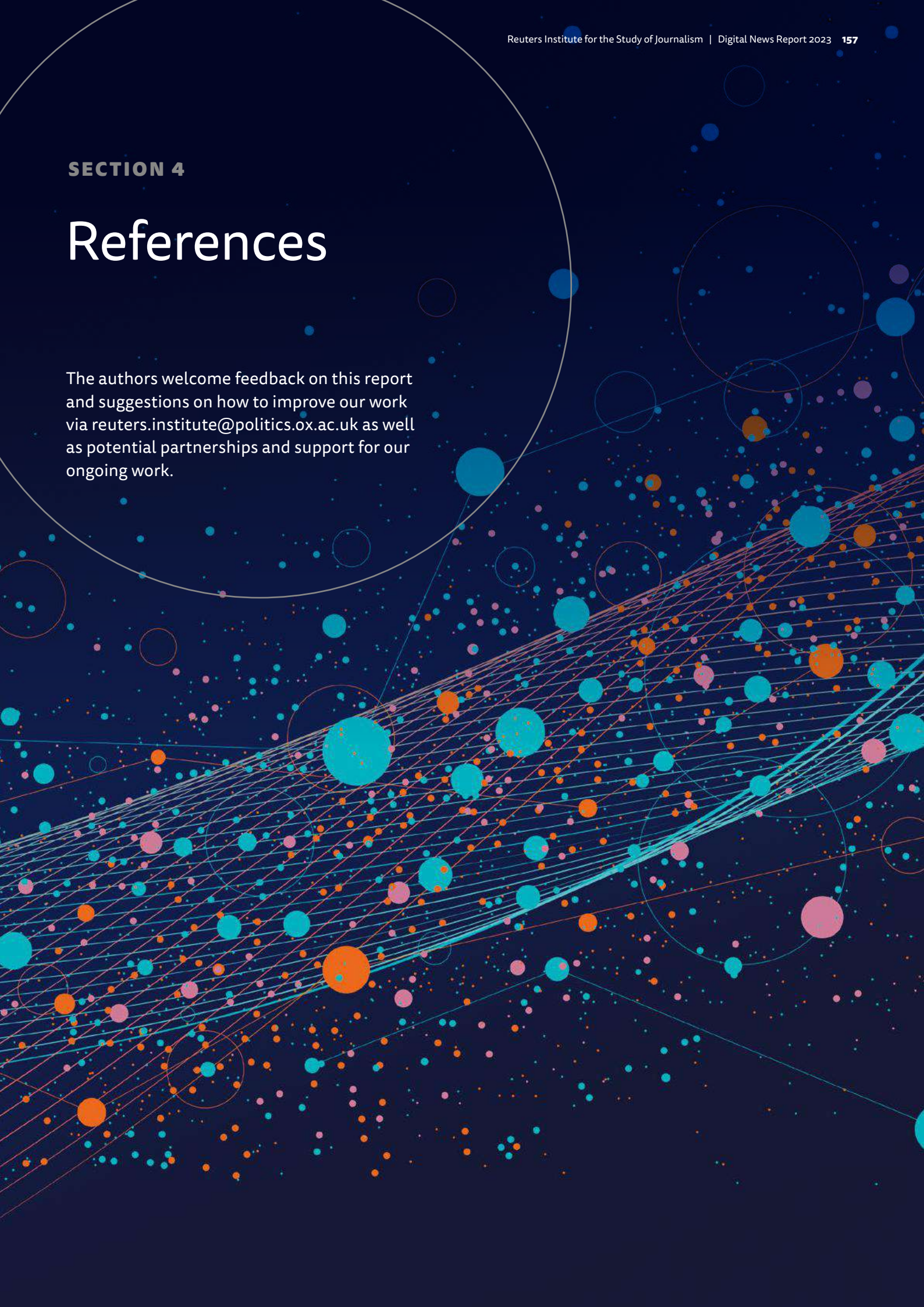
SECTION 4



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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PHOTO CREDITS

p. 23: A woman reacts while speaking near a block of flats, which was destroyed during Ukraine-Russia conflict in the besieged southern port city of Mariupol, Ukraine. REUTERS/Alexander Ermochenko

p. 25: Journalists and activists call for justice and protection of media workers during an indignation rally following the killing of Filipino radio journalist Percival Mabasa, in Quezon City, Philippines. REUTERS/Eloisa Lopez

p. 41: Hungarian Prime Minister Viktor Orban. REUTERS/Bernadett Szabo

p. 41: Turkish President Tayyip Erdogan. REUTERS/Dylan Martinez

p. 42: Hugh Grant speaks at a news conference organised by 'Hacked Off', which is calling for a full public inquiry into the phone hacking scandal. REUTERS/Darren Staples

p. 42: Prince Harry, Duke of Sussex, leaves the High Court in London. REUTERS/Henry Nicholls

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