Reuters Institute Digital News Report 2021

10TH EDITION

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UNIVERSITY OF OXFORD

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Nic Newman with Richard Fletcher, Anne Schulz,
Simge Andı, Craig T. Robertson, and Rasmus Kleis Nielsen

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Foreword

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

This is the tenth edition of our *Digital News Report* and a milestone for us in that the 46 markets covered this year account for more than half the world's population. We are particularly proud to be able to include more countries in the Global South, primarily because we hope the data and analysis we present are useful for journalists, editors, and media executives there, but also because we strongly believe their colleagues elsewhere can learn a lot from the situation in countries where news media have long faced political attacks, financial precarity, and internet users heavily oriented towards mobile and social media – some of the realities journalists in historically more privileged parts of the world increasingly have to deal with.

Our findings this year show how, if anything, the Coronavirus pandemic has exacerbated many of the long-term trends we have documented over the past decade, especially the move to a more digital, mobile, and platform-dominated media environment. Developments this year put further pressure on the business models of many traditional media, but have also reminded at least parts of the public of the importance and value of trustworthy news from independent news organisations.

This year's survey finds evidence that some brands have benefited from a desire for reliable information around the pandemic – both in terms of higher reach, higher trust, and more paying subscribers. While the effects are uneven, do not apply to all brands or all countries, and may not last after the crisis is over, these are positive findings from publishers' point of view.

Our analysis also shows how the role of different platforms is evolving. We document the roles played by mainstream news organisations, individual journalists, and other voices on different social media, the continuing move to closed messaging apps and more visual social media, as well as the continued widespread public concern over false or misleading information – especially Facebook and Facebook-owned messaging applications including WhatsApp.

Amid deep divisions within many societies over politics and social justice, we ask searching questions about what people expect from their news and examine attitudes to traditional notions of journalistic impartiality and objectivity. We also explore how fairly the media are seen as treating different groups including women, young people, and ethnic minorities.

And our report continues to document the economic impact of digital disruption which has been intensified by the COVID-19 pandemic (even as platform companies including Google and Facebook reported significant growth last year). Given the financial challenges the business of news faces, we explore public attitudes to whether the government should step in to support commercial media – but find little appetite for this.

Our survey this year covered 46 markets, including 24 in Europe, and six in Latin America where we have added Colombia and Peru. In Asia we have added India, Indonesia, and Thailand to our existing eight markets, and in Africa we are delighted to include Nigeria for the first time, following the inclusion of Kenya in 2020 and South Africa in 2019.

Because we use online polling, we continue to focus on countries with high internet penetration and which are either broadly democratic or generally compare themselves to countries with a democratic tradition. Even so, the increasing number and diversity of markets covered 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 often publishing their own reports.

Given the richness of the research, this report can only convey a small part of the data and analysis. More detail is available on our website https://www.digitalnewsreport.org/2021 which contains slidepacks and charts, along with a licence that encourages reuse, subject to attribution.

Making all this possible, we are hugely grateful to our sponsors: the Google News Initiative, BBC News, Ofcom, the Broadcasting Authority of Ireland, the Dutch Media Authority (CvdM), the Media Industry Research Foundation of Finland, the Fritt Ord Foundation in Norway, the Korea Press Foundation, and Edelman UK, as well as our academic sponsors at the Leibniz Institute for Media Research/Hans Bredow Institute, Hamburg, the University of Navarra, the University of Canberra, the Centre d'études sur les médias, Quebec, Canada, and Roskilde University in Denmark. The Open Society Foundations has played a key role in helping us to expand the report to cover more countries in the Global South over the last few years, as has Google's commitment to a three-year extension of their support for the report. This year Fundación Gabo has joined the project, and we are delighted they are supporting the translation of the report into Spanish.

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 (and their partners) using an online questionnaire at the end of January/beginning of February 2021.

- Samples were assembled using nationally representative quotas for age, gender, region in every market, and education in all markets except Bulgaria, Croatia, Greece, India, Indonesia, Kenya, Malaysia, Mexico, Nigeria, Philippines, Romania, South Africa, Thailand, and Turkey. In the US, UK, Denmark, Sweden, Norway, and Italy we have applied additional political quotas based on vote choice in the most recent national election. The data in all markets were also 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 in English in these markets,[1] and restricted to ages 18–50 in Kenya and Nigeria. Findings should not be taken to be nationally representative in these countries.
- More generally, online samples will tend to under-represent the news consumption habits of people who are older and less affluent, meaning online use is typically over-represented and traditional offline use under-represented. In this sense, it is better to think of results as representative of the online population. In markets in Northern and Western Europe, where internet penetration is typically around 95%, the differences between the online population and national population will be small, but in South Africa (58%) and India (54%), where internet penetration is lower, the differences between the online population and the national population will be large.
- These differences mean we need to be cautious when comparing results between markets, especially on issues where we know that the sample would potentially make a significant difference (e.g. paying for news or podcasts).
- It is also important to note that online surveys rely on recall, which is often imperfect or subject to biases. We have tried to mitigate these risks through careful questionnaire design and testing. Despite other limitations, surveys are able to capture media consumption across platforms, including social media, messaging apps, and websites. They are also a good way of tracking activities and changes over time in a consistent way.[2]
- It is important to note that some of our survey-based results will not match industry data, which are often based on different methodologies, such as web-tracking. The accuracy of these approaches can be high, but they are also subject to limitations.
- In some cases, we have drawn on data from other surveys or from industry sources and have signalled this in the text or as a footnote. We have also used selected quotes from focus groups and interviews conducted in four countries (USA, UK, Germany, and Brazil) in February 2021. On occasion we have also used quotes from open questions from our main survey, clearly indicating this in each case.
- A fuller description of the methodology, panel partners, and a discussion of non-probability sampling techniques can be found on our website along with the full questionnaire https://digitalnewsreport.org/2021-methodology.

Market	Sample size	Population	Internet penetration
Europe			
UK	2,039	67m	95%
Austria	2,000	9.0m	88%
Belgium	2,008	11.6m	94%
Bulgaria	2,018	7.0m	67%
Croatia	2,008	4.1m	92%
Czech Republic	2,007	10.6m	88%
Denmark	2,005	5.8m	98%
Finland	2,009	5.6m	94%
France	2,012	65m	92%
Germany	2,011	82m	96%
Greece	2,017	11.1m	73%
Hungary	2,032	9.7m	89%
Ireland	2,031	4.8m	92%
Italy	2,010	59m	93%
Netherlands	2,006	17m	96%
Norway	2,010	5.4m	98%
Poland	2,009	38m	78%
Portugal	2,101	10.2m	78%
Romania	2,010	19m	74%
Slovakia	2,024	5.5m	85%
Spain	2,019	46m	93%
Sweden	2,005	10.1m	96%
Switzerland	2,000	8.6m	94%
Turkey	2,022	83m	83%
Americas			
USA	2,001	327m	96%
Argentina	2,007	45m	93%
Brazil	2,009	211m	71%
Canada	2,036	37m	90%
Chile	2,009	18m	78%
Colombia	2,046	49m	63%
Mexico	2,036	131m	65%
Peru	2,010	33m	68%
Asia Pacific			
Australia	2,034	26m	84%
Hong Kong	1,501	7.6m	89%
India	2,049	1393m	54%
Indonesia	2,007	276m	71%
Japan	2,004	126m	95%
Malaysia	2,019	33m	89%
Philippines	2,029	111m	78%
Singapore	2,034	5.9m	88%
South Korea	2,006	51m	96%
Taiwan	2,042	24m	92%
Thailand	2,015	70m	82%
Africa			
Kenya	2,005	55m	85%
Nigeria	2,051	211m	73%
South Africa	2,009	60m	58%

Source: Internet World Stats (http://www.internetworldstats.com).
In the Netherlands we conducted a repoll of brand reach numbers in late March 2021 due to a scripting error in the original poll. All other numbers are taken from the January/February poll.

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 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 year-on-year change.

Authorship and Research Acknowledgements

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

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

Dr Anne Schulz is a postdoctoral Research Fellow at the Reuters Institute for the Study of Journalism. She is researching questions surrounding news audiences and digital news with a focus on local news, social media, news literacy, and trust. Her research is anchored in the fields of journalism studies, political communication, and media psychology.

Dr Simge Andı is a postdoctoral Research Fellow at the Reuters Institute for the Study of Journalism. Her doctoral work explored online misinformation, mainly focusing on the sharing of false information via social media. She uses survey and experimental data to study the consumption and sharing of news.

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.[3] RISJ Senior Research Associate Dr David Levy did invaluable work editing and developing many of the country profiles in this year's report. Additional expert analysis and interpretation of the survey data were provided by the team at YouGov, in particular, Charlotte Clifford, Lucie Larboulette, David Eastbury, Mark Pellatt, and Kulvir Channa.

[3] Reuters Fellowships offer an opportunity to mid-career journalists to spend time researching an aspect of journalism for one or more terms at the Institute in Oxford.

SECTION 1

Executive Summary and Key Findings

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

More than a year after it began, the Coronavirus pandemic continues to cast a dark cloud over the health of our communities – as well as that of the news industry. The crisis – complete with lockdowns and other restrictions – has hastened the demise of printed newspapers, further impacting the bottom line for many once proud and independent media companies. Our country pages this year are full of stories of journalistic lay-offs as advertisers take fright in the face of a global economic downturn. New business models such as subscription and membership have been accelerated by the crisis, as we document in this year's report. But in most cases, this has still not come anywhere near making up for lost income elsewhere.

And yet this crisis has also shown the value of accurate and reliable information at a time when lives are at stake. In many countries we see audiences turning to trusted brands – in addition to ascribing a greater confidence in the media in general. The gap between the 'best and the rest' has grown, as has the trust gap between the news media and social media. Of course, these trends are not universal and this year's report also exposes worrying inequalities in both consumption and trust with the young, women, people from ethnic minorities, and political partisans often feeling less fairly represented by the media.

The Capitol Hill riot in the United States and the global spread of false information and conspiracy theories about Coronavirus have further focused minds on where people are getting their news, which is why we have undertaken detailed research this year on understanding the role of different social networks for news and the complex ways in which they are being used to spread misleading and false information around the world.

This tenth edition of our *Digital News Report*, based on data from six continents and 46 markets, aims to cast light on the key issues that face the industry at a time of deep uncertainty and rapid change. Our more global sample, which includes India, Indonesia, Thailand, Nigeria, Colombia, and Peru for the first time, provides a deeper understanding of how differently the news environment operates outside the United States and Europe and we have tried to find new ways to reflect this, whilst recognising that differences in internet penetration and education will make some comparisons less meaningful. The overall story is captured in this Executive Summary, followed by Section 2 with chapters containing additional analysis and then individual country and market pages in Section 3 with extra data and industry context.

A SUMMARY OF SOME OF THE MOST IMPORTANT FINDINGS FROM OUR 2021 RESEARCH

- Trust in the news has grown, on average, by six percentage points in the wake of the Coronavirus pandemic with 44% of our total sample saying they trust most news most of the time. This reverses, to some extent, recent falls in average trust bringing levels back to those of 2018. Finland remains the country with the highest levels of overall trust (65%), and the USA now has the lowest levels (29%) in our survey.
- At the same time, trust in news from search and social has remained broadly stable. This means that the *trust gap* between the news in general and that found in aggregated environments has grown with audiences seemingly placing a greater premium on accurate and reliable news sources.
- In a number of countries, especially those with strong and independent public service media, we have seen greater consumption of trusted news brands. The pattern is less clear outside Western Europe, in countries where the Coronavirus crisis has dominated the media agenda less, or where other political and social issues have played a bigger role.
- Television news has continued to perform strongly in some countries, but print newspapers have seen a further sharp decline almost everywhere as lockdowns impacted physical distribution, accelerating the shift towards a mostly digital future.
- While many remain very engaged, we find signs that others are turning away from the news media and in some cases avoiding news altogether. Interest in news has fallen sharply in the United States following the election of President Biden – especially with right-leaning groups.
- Elsewhere, we find that the media are seen to be representing young people (especially young women), political partisans, and – at least in the US – people from minority ethnic groups less fairly. These findings will give added urgency to those who are arguing for more diverse and inclusive newsrooms.
- Despite more options to read and watch partisan news, the majority of our respondents (74%) say they still prefer news that reflects a range of views and lets *them* decide what to think. Most also think that news outlets should try to be neutral on every issue (66%), though some younger groups think that 'impartiality' may not be appropriate or desirable in some cases, for example, on social justice issues.
- The use of social media for news remains strong, especially with younger people and those with lower levels of education. Messaging apps like WhatsApp and Telegram have become especially popular in the Global South, creating most concern when it comes to spreading misinformation about Coronavirus.
- Global concerns about false and misleading information have edged slightly higher this year, ranging from 82% in Brazil to just 37% in Germany. Those who use social media are more likely to say they have been exposed to misinformation about Coronavirus than non-users. Facebook is seen as the main channel for spreading false information almost everywhere but messaging apps like WhatsApp are seen as a bigger problem in parts of the Global South such as Brazil and Indonesia.

- Our data suggest that mainstream news brands and journalists attract most attention around news in both Facebook and Twitter but are eclipsed by influencers and alternative sources in networks like TikTok, Snapchat, and Instagram. TikTok now reaches a quarter (24%) of under-35s, with 7% using the platform for news – and a higher penetration in parts of Latin America and Asia.
- We have seen significant increases in payment for online news in a small number of richer Western countries, but the overall percentage of people paying for online news remains low. Across 20 countries where publishers have been pushing for more online payment, 17% have paid for any online news in the last year – up two percentage points. Norway continues to lead the way with 45% (+3) followed by Sweden (30%), the United States (21%), Finland (20%), the Netherlands (17%), and Switzerland (17%). There has been less progress in France (11%), Germany (9%), and the United Kingdom (8%).
- In most countries a large proportion of digital subscriptions go to just a few big national brands, reinforcing the *winner takes most* dynamics that we have reported in the past. But in the United States and Norway we do find that up to half of those paying are now taking out *additional* subscriptions, often to local or regional newspaper brands.
- More widely, though, we find that the value of traditional local and regional news media is increasingly confined to a small number of subjects such as local politics and crime. Other internet sites and search engines are considered best for a range of other local information including weather, housing, jobs, and 'things to do' that used to be part of what local news media bundled together.
- Access to news continues to become more distributed. Across all markets, just a quarter (25%) prefer to start their news journeys with a website or app. Those aged 18–24 (so-called Generation Z) have an even weaker connection with websites and apps and are almost twice as likely to prefer to access news via social media, aggregators, or mobile alerts.
- While mobile aggregators play a relatively small part in the media eco-system of Western countries, they have a powerful position in many Asian markets. In India, Indonesia, South Korea, and Thailand a range of human- and AI-powered apps like Daily Hunt, Smart News, Naver, and Line Today are playing an important new role in news discovery.
- More widely, the use of smartphone for news (73%) has grown at its fastest rate for many years, with dependence also growing through Coronavirus lockdowns. Use of laptop and desktop computers and tablets for news is stable or falling, while the penetration of smart speakers remains limited in most countries – especially for news.
- Growth in podcasts has slowed, in part due to the impact of restrictions on movement. This is despite some high-profile news launches and more investment via tech platforms. Our data show Spotify continuing to gain ground over Apple and Google podcasts in a number of countries and YouTube also benefiting from the popularity of video-based and hybrid podcasts.

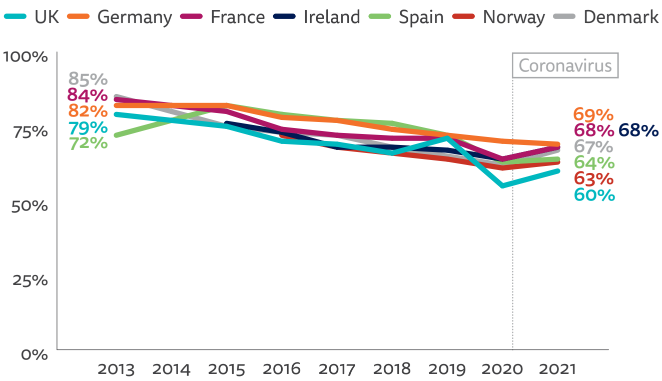
CHANGING NEWS CONSUMPTION AND THE IMPACT OF CORONAVIRUS

The pandemic has affected markets at different times and to different degrees. Our polling was conducted when the UK and Ireland were in full lockdown, the United States and Brazil were operating under state-by-state rules, while Australia, Taiwan, and Japan were mostly free of internal restrictions. Common patterns may be hard to discern, but it is instructive to look at parts of the world that have been badly and collectively affected. In this respect, Western Europe provides a good case study.

Across a number of European countries we find that consumption of television news is significantly higher than a year ago when no restrictions on movement were in place. This is not surprising, given that so many people have been stuck at home, but has reaffirmed the importance of a medium that is accessible, easy to consume, reaches a wide range of demographics, and is mostly well trusted. Twenty-four-hour news channels such as Sky News (+5 percentage points) in the UK and n-tv (+6pp) in Germany are amongst the brands to have benefited.

> ***I was watching the press conferences on n-tv almost every lunchtime. And, okay the Corona thing has calmed down a bit, but just being in my home-office means you have more opportunities to have a quick look.***
>
> *F, 56, Germany focus group*

PROPORTION THAT USED TV NEWS IN THE LAST WEEK (2013-21) – SELECTED MARKETS



Q3. Which, if any, of the following have you used in the last week as a source of news? *Base: Total 2013–21 samples in each market (most n ≈ 2000). Note: No data for 2014 due to a scripting error in the survey.*

In some of these countries, there has been an even bigger switch in underlying preference (main source) towards TV and away from online. In the UK, the proportion selecting TV news as *main source* was up to 36% (+7pp) and in Ireland 41% (+8pp). In both countries we see increased TV reliance across age groups, though older people, of course, still have a much greater underlying preference for TV news.

It would be wrong to over-emphasise any temporary bump in TV consumption given the longer term shift towards digital sources but it is a reminder of the continuing draw of video-based storytelling as well as the strength of traditional news brands. But perhaps the most striking finding around consumption has been the extent to which people have placed a premium on reliable news sources in general, not just on TV.

Trusted brands also do better online

It is important to note that our last survey captured a moment in time pre-pandemic (January 2020), and a year later in January 2021 we captured another, when the impact of Coronavirus varied across countries. In the intervening time we know that most news brands reported at various times vastly increased usage – especially during the first months of the crisis. Our data, a year on, perhaps show which brands may have held onto those gains most effectively, giving a hint of more lasting changes.

In our analysis of fourteen European countries (listed underneath the chart below), we note that some of the most trusted news organisations – including commercial and public media brands – have retained quite significant extra online audiences in terms of online reach. On average, brands with lower trust scores have done less well by comparison. This trend is strongest in Sweden, Austria, Ireland, and Norway, a little less so in Finland – perhaps because *all* big brands are relatively well trusted there.

Looking across our data, although the overall link between trust and increased reach is weak, the key beneficiaries in terms of weekly use seem to be big commercial and public service news brands – especially those that already had a reputation for reliable online news. This means brands like *VG* in Norway (+9pp), TV2 in Denmark (+8pp), and MTV News (+7pp) in Finland. Others that have done better than average include *The Irish Times* (+7pp), *Der Standard* in Austria (+5pp), and *Le Soir* in Belgium (+4pp). Many of these changes have come in markets where the overall consumption of online news has not increased overall year-on-year.

Public service media websites have performed particularly well, perhaps because they have been able to use their reach via TV and radio to promote more detailed information online. Public media websites have provided extensive local breakdowns of Coronavirus data, alongside fact-checking and other explanations.

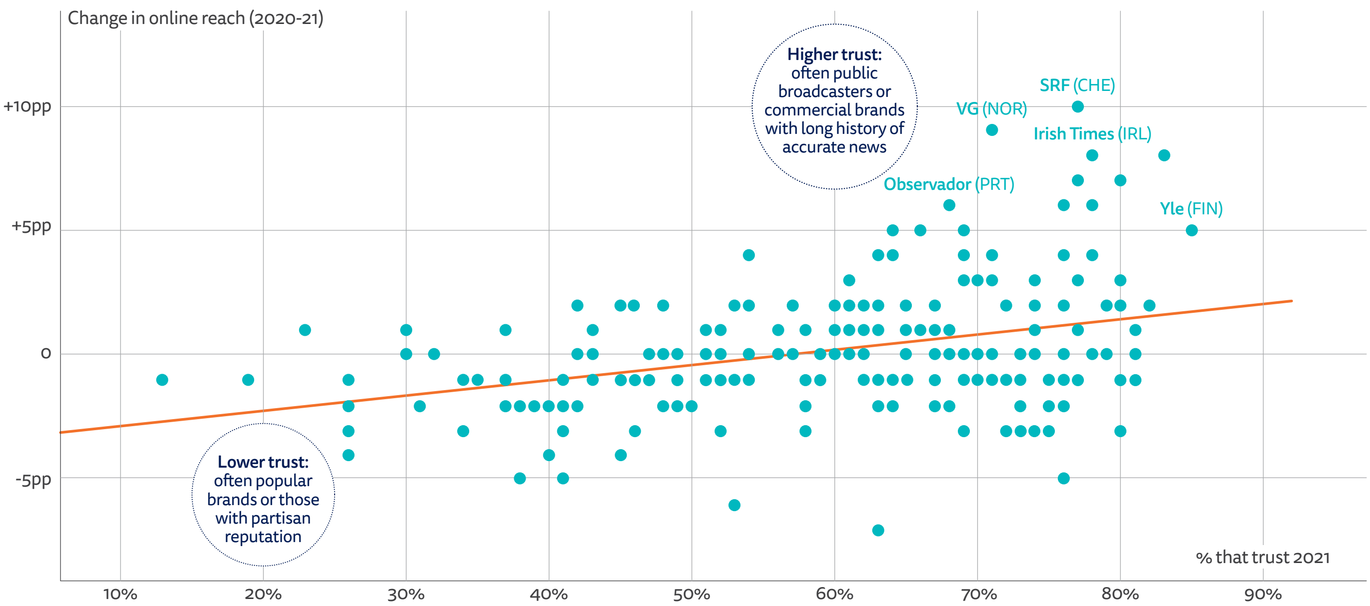
PROPORTION THAT USED SELECTED PSBs ONLINE IN THE LAST WEEK

		Online reach	2020-2021 change
NRK	NRK News (Norway)	42%	+8
yle	YLE (Finland)	44%	+5
svt	SVT (Sweden)	34%	+3
RTÉ	RTÉ News (Ireland)	41%	+8
BBC NEWS	BBC News (UK)	46%	+1
Average of 18 PSBs across 14 countries		**28%**	**+3**

Q5b. Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of internet access)? *Base: Total samples 2020-21 samples in each market (n ≈ 2000).*

These gains have not been generally reflected in countries where public broadcasters are less well trusted. Outside Europe we also find examples of PSBs that have enhanced their reach during this crisis, including ABC in Australia. This has given a boost to a sector whose legitimacy and funding have been threatened by a combination of changing consumer behaviour and attacks by populist and right-wing politicians. Before the crisis, for example, Boris Johnson's Conservative government in the UK was considering turning the BBC into a subscription operation, now MPs are recommending any change to funding arrangements should be shelved until at least 2038.[4]

CHANGE IN ONLINE REACH FOR SELECTED OUTLETS BY AUDIENCE TRUST – SELECTED MARKETS



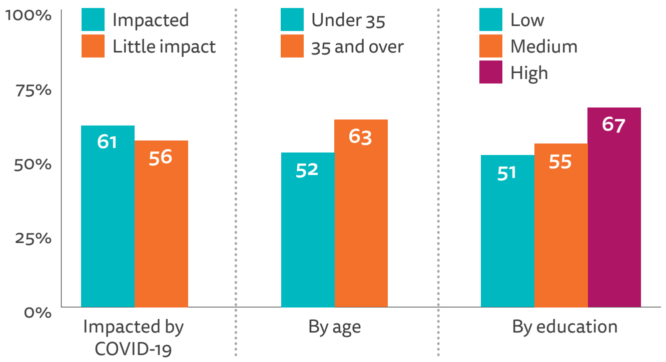
Q5b. Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of internet access)? **Q6_2018_trust.** How trustworthy would you say news from the following brands is? *Base: Total 2020–21 samples in selected markets (n ≈ 2000). Note: The association between 2021 trust and change in online reach (2021-20) was tested using a multilevel model to account for clustering within countries (b = .06, p = .01). Included markets are UK, Austria, Belgium, Finland, France, Germany, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, and Switzerland.*

[4] https://www.theguardian.com/media/2021/mar/25/television-licence-fee-preferred-option-fund-bbc-2038-mps

INTEREST FLAGS IN 'DEPRESSING' CORONAVIRUS NEWS FOR SOME

Interest in news has risen in some countries that have been badly affected by the crisis. It is also higher in people whose lives have been directly impacted, but on average across countries we find that levels of interest (59%) have not risen over the last year – with young people and those with lower education still paying less attention.

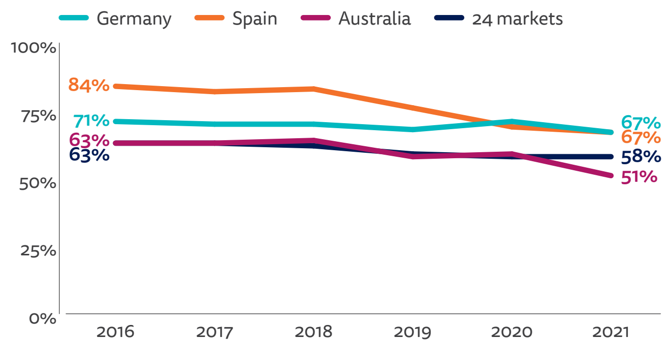
PROPORTION VERY OR EXTREMELY INTERESTED IN NEWS BY COVID-19 IMPACT, AGE, AND EDUCATION – ALL MARKETS



Q1c. How interested, if at all, would you say you are in news? **Coronaimpact.** Thinking about all aspects of your life, how much, if at all, has the coronavirus (COVID-19) situation changed things for you personally? **Education.** What is your highest level of education? If you are currently in full-time education please put your highest qualification to date. *Base: Impacted by COVID-19/Little impacted; U35/35+; Low education/Medium/High: All markets = 67,342/20,444; 29,137/63,235; 13,056/39,945/39,371.*

If we take a longer term perspective, we actually see a *decline* in news interest in a number of countries – despite the turbulent times in which we live. The proportion that says they are very or extremely interested has fallen by an average of five percentage points since 2016 – with a 17 percentage point drop in Spain and the UK, 12 points in Italy and Australia, and eight in France and Japan. There has been little or no decline in countries such as Germany and the Netherlands.

PROPORTION VERY OR EXTREMELY INTERESTED IN NEWS (2016-21) – SPAIN, GERMANY, AUSTRALIA, 24 MARKETS



Q1c. How interested, if at all, would you say you are in news? *Base: Total 2016-21 samples in each market (most n ≈ 2000). Note: Includes 24 markets that were part of our survey in 2016, excluding Turkey and Brazil due to changes in panel composition in that time.*

More than a year on, intense interest in the subject appears to be waning, with many in our focus groups saying they often find the news repetitive, confusing, and even depressing.

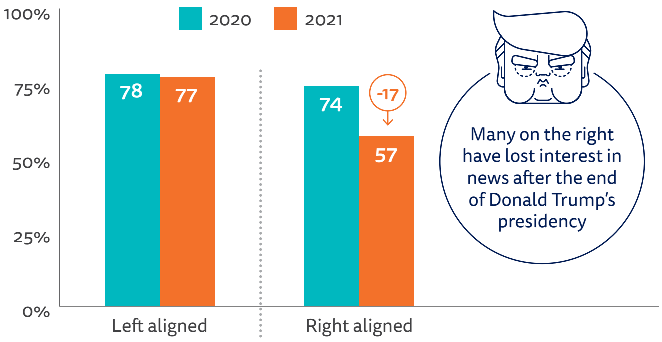
> ***I must admit that first of all I started watching it, really engrossed in it, and then as time went on, I found it quite depressing so I just cut it off.***
>
> *F, 30, UK focus group*

> ***I've consumed less TV and radio because if it's consistently COVID, COVID, COVID, or consistently political fluff, then I just turn it off.***
>
> *M, 58, US focus group*

United States a special case

In some countries, lower interest may be as much to do with changed politics as the Coronavirus crisis itself. Interest in the news in the United States has declined by 11 percentage points in the last year to just 55%. To some extent this is not surprising as our poll was conducted *after* the turbulent events on Capitol Hill in January and the departure of Donald Trump. But our data show signs that many former Trump supporters may be switching away from news altogether. Almost all of this fall in interest came from those on the political right.

PROPORTION VERY OR EXTREMELY INTERESTED IN NEWS BY POLITICAL LEANING (2020-21) – USA



Q1c. How interested, if at all, would you say you are in news? *Base: Left/Right in the US: 2020 = 507/458; 2021 = 429/446.*

Since January, right-leaning TV networks in the US such as Fox News have lost a significant chunk of their audience but so too have liberal outlets like CNN. Some commentators have long predicted that 'Journalism's Trump bump might be giving way to a slump', as online ratings also fell dramatically in February 2021.[5]

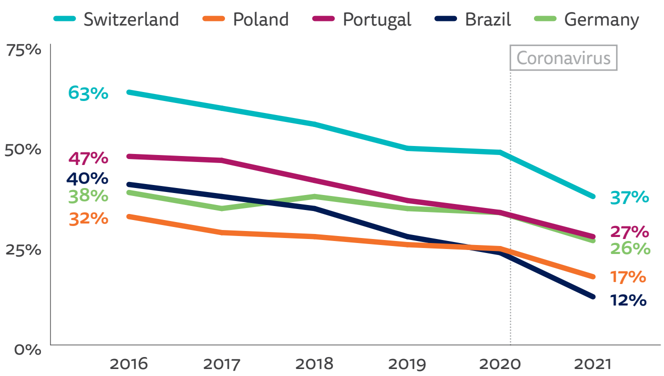
Decline in interest in mainstream news remains a huge challenge at a time when societies are facing such a set of existential threats to health and prosperity. The challenge for media companies is how to re-engage that interest without dumbing down or resorting to sensationalism, which in turn can damage trust.

[5] https://www.washingtonpost.com/lifestyle/media/media-trump-bump-slump/2021/03/22/5f13549a-85d1-11eb-bfdf-4d36dab83a6d_story.html

CORONAVIRUS ANOTHER 'NAIL IN THE COFFIN' FOR PRINT

Print publications have been badly affected by COVID-19, partly due to restrictions on movement and partly due to the associated hit to advertising revenue. Countries that have traditionally had high levels of circulation, such as Germany, Austria, and Switzerland, have seen some of the biggest falls. Concerns about contamination from printed copies sold at newsstands affected daily sales in many countries.

PROPORTION THAT USED PRINTED NEWS IN THE LAST WEEK (2016-21) – SELECTED MARKETS



SELECTED OTHER CHANGES (2020-21):

Market								
US	16%	(-4)	Sweden	26%		South Korea	18%	
UK	15%	(-7)	Finland	31%	(-6)	Taiwan	19%	
France	14%		Austria	45%	(-6)	Philippines	16%	(-6)
Italy	18%	(-4)	Argentina	20%	(-3)	Kenya	36%	(-11)
Spain	26%	(-8)	Mexico	21%	(-5)	South Africa	32%	(-5)
Ireland	28%	(-4)	Australia	20%	(-5)			
Norway	21%	(-4)	Japan	27%				

Q3. Which, if any, of the following have you used in the last week as a source of news? *Base: Total 2013–21 samples in each market (most n ≈ 2000). Note: If no year-on-year change is shown there is no statistically significant difference between 2020 and 2021.*

The crisis has had a devastating impact on freesheets that are mainly distributed to commuters on public transport. In the UK, for example, distribution of both *Metro* and the *Standard* fell by around 40% year-on-year according to industry data. More widely, the impact of Coronavirus is driving more industry consolidation but also accelerating plans for digital and workflow transformation.[6] As one example, News Corp Australia suspended the print editions of 112 suburban and regional mastheads, axing almost 1,000 jobs. Our country pages document how both local and national publications have been affected by furloughs, layoffs, and closures, reducing the ability to inform citizens at a time of greatest need.

For further information on the impact on jobs and mastheads see section 3: Country and Market Data

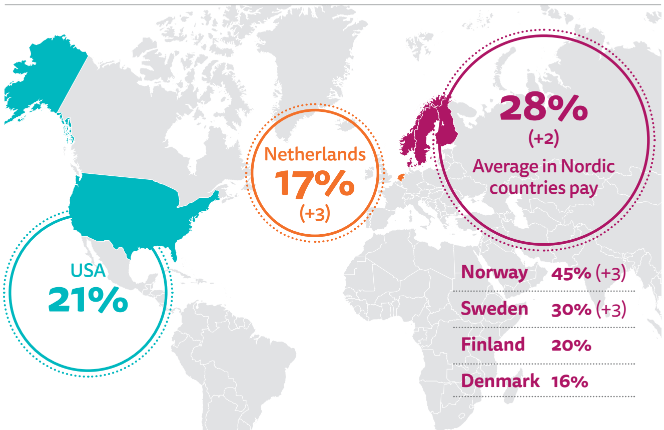
PAYING FOR NEWS AND THE SHIFT TO READER REVENUE

The last year has also seen more quality journalism go behind paywalls, as print and digital-born publishers turn to subscription, membership, and donations to reduce their reliance on advertising – which online continues to go primarily to Google and Facebook. *El País* in Spain, *El Tiempo* in Colombia, and News 24 in South Africa are amongst those to have started their paywall journeys in the midst of the pandemic.

Overall progress remains slow. Across 20 countries where publishers have been actively pushing digital subscriptions, and that we have been tracking since 2016, we find 17% saying that they have paid for some kind of online news in the last year (via subscription, donation, or one-off payment). That's up by two percentage points in the last year and up five since 2016 (12%). Despite this, it is important to note that the vast majority of consumers in these countries continue to resist paying for *any* online news.

We find most success in a small number of wealthy countries with a long history of high levels of print newspaper subscriptions, such as Norway 45% (+3), Sweden 30% (+3), Switzerland 17% (+4), and the Netherlands 17% (+3). Around a fifth (21%) now pay for at least one online news outlet in the United States, 20% in Finland, and 13% in Australia. By contrast, just 9% say they pay in Germany and 8% in the UK.

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



SELECTED OTHER MARKETS:

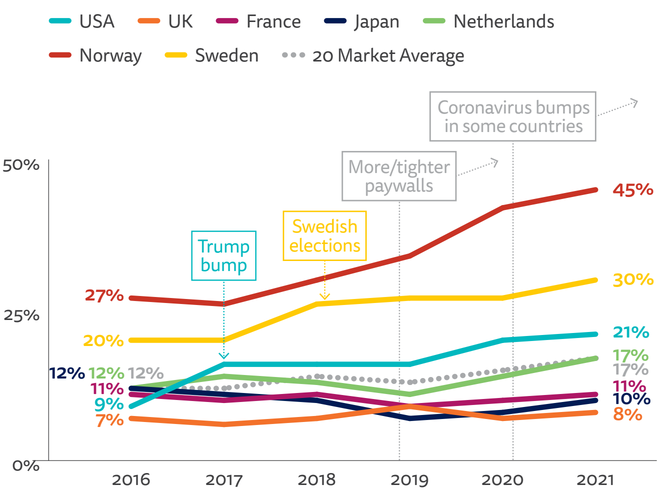
Poland	18%		Canada	13%		France	11%	
Switzerland	17%	(+4)	Italy	13%	(+3)	Japan	10%	
Belgium	16%	(+4)	Spain	12%		Germany	9%	
Ireland	16%	(+4)	Austria	12%		UK	8%	

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 or one-off payment for an article or app or e-edition). *Base: Total 2021 sample in each market (n ≈ 2000). Note: If no year-on-year change is shown there is no statistically significant difference between 2020 and 2021.*

[6] https://reutersinstitute.politics.ox.ac.uk/journalism-media-and-technology-trends-and-predictions-2021

The following chart provides more background on the *development* of paid content in some of these 20 markets. It shows, for example, how divisive elections can produce a bump in subscriptions; after the election of Donald Trump in 2016, we saw a surge of new subscriptions to publications like the *New York Times* and *Washington Post*. Progress has been faster in Norway and Sweden, partly because they are small markets protected by language, but also because a limited number of digitally committed publishers have almost all sought to charge for online news. More recently, across countries, publishers have added or tightened paywalls, using data to target new customers and linking messaging to the importance of trusted content. These approaches may have helped drive recent increases in countries such as Switzerland and the Netherlands. COVID-19 may also have contributed to the perceived value of some quality journalism. But in countries such as France and the UK the headline rate has been hard to shift, even if a handful of publishers are attracting new subscribers running into tens of thousands.

PROPORTION THAT PAID FOR ANY ONLINE NEWS IN THE LAST YEAR (2016-21) – SELECTED MARKETS



Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription, or one-off payment for an article or app or e-edition.) *Base: Total 2016-21 samples in each market (most n ≈ 2000). Note: 20 market average includes USA, UK, Germany, France, Italy, Spain, Portugal, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Canada, Australia, Japan, Poland.*

Subscription winners around the world

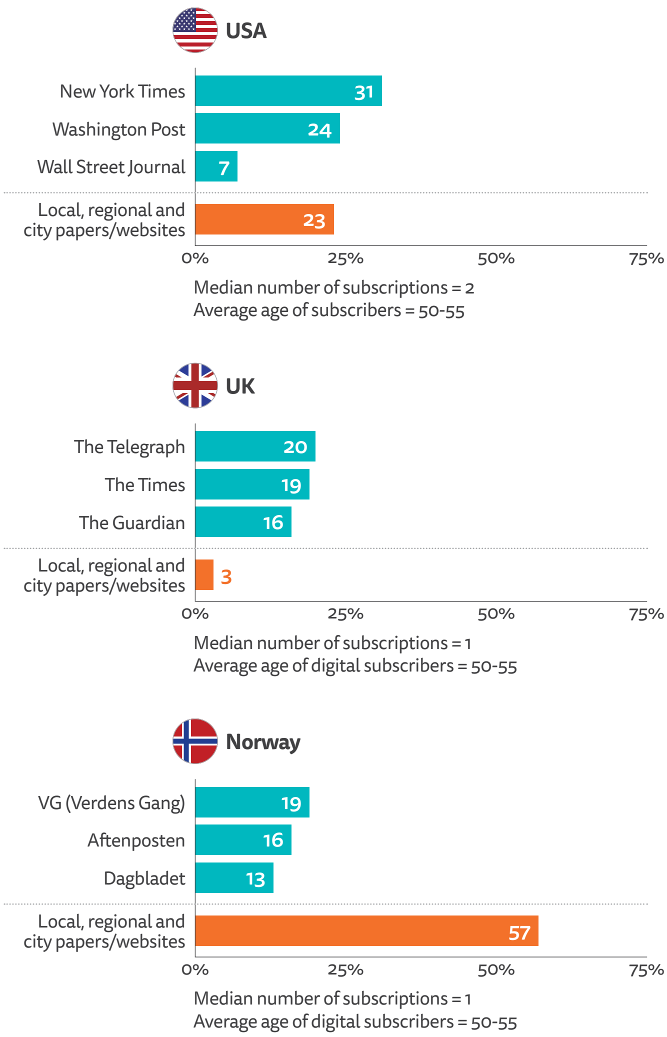
This year we asked respondents in a number of countries to tell us how many subscriptions they have taken out and which news brands they pay for.

We have previously highlighted a *winner takes most* dynamic and it is a similar story this year. Getting on for half of all subscribers in the United States (45%) pay for one of the *New York Times*, *Washington Post*, or *Wall Street Journal*, according to our data. In the UK, *The Times*, *Telegraph* and *Guardian* account for over half (52%) of those who currently pay, while in Finland, we find that almost half of subscribers (48%) pay for just *one* publication, the leading broadsheet *Helsingin Sanomat*.

In Germany, which has long had a more competitive market with strong regional titles reaching a significant national audience, the pie is more evenly split between a range of national titles, including the tabloid *Bild* as well as the up-market *Der Spiegel*, *Die Zeit*, *FAZ*, and *Süddeutsche Zeitung*, while in Spain we find a mix of national titles and smaller digital-born outlets pursuing membership models.

One striking finding from our survey this year is the difference in contribution made by local and regional publications across countries. In Norway, 57% of subscribers pay for one or more local outlets in digital form. This compares with 23% in the United States, but just 3% in the United Kingdom.

PROPORTION OF ONGOING DIGITAL SUBSCRIBERS THAT PAY FOR SELECTED BRANDS – USA, UK, NORWAY



Q7_subs_name. You said you have paid a subscription/membership to one or more digital news services in the last year … Please enter the name of the news subscription you value most, followed by your supplementary subscriptions. *Base: All that paid for a subscription/membership to a digital news service in the last year: Norway = 656; USA = 336; UK = 125.*

Sweden (37%) and Finland (31%) also have a high take-up for local publications amongst subscribers. These data give us much better insights into why subscription levels in Nordic countries, and to some extent in the United States, are so much higher than elsewhere – namely the contribution of local and regional news. In English-speaking countries such as Australia and Ireland we find a significant proportion of subscribers paying for foreign titles such as the *New York Times* and *The Times* of London, often at a discounted rate. In terms of demographics, those taking out online news subscriptions tend to be richer, more educated, and older, with an average age ranging from 40-45 in Spain to over 55 in Denmark.

PROFILE OF ONGOING DIGITAL SUBSCRIBERS – SELECTED MARKETS

Country *Example national titles*	Median number of subscriptions	Average age subscriber (ongoing payment)	Subscribe to local titles	Subscribe to foreign titles
Australia *Sydney Morning Herald, Herald Sun*	1	50-55	30%	15%
Austria *Kronen Zeitung, Der Standard*	1	45-50	13%	11%
Canada *Globe & Mail, Toronto Star*	1	50-55	9%	27%
Denmark *Berlingske, Politiken*	1	55-60	25%	5%
France *Le Monde, Mediapart*	1	45-50	15%	7%
Finland *Helsingin Sanomat, Aamulehti*	1	45-50	31%	4%
Germany *Bild, Der Spiegel*	1	45-50	31%	8%
Ireland *Irish Times, Irish Independent*	1	40-45	1%	20%
Italy *Corriere della Sera, La Repubblica*	1	50-55	14%	3%
Netherlands *De Telegraaf, AD, Volkskrant*	1	45-50	16%	5%
Sweden *Aftonbladet, Dagens Nyheter*	1	50-55	37%	2%
Spain *El Pais, El Mundo, elDiario.es*	1	40-45	15%	11%

Q7_subs_name. You said you have paid a subscription/membership to one or more digital news services in the last year ... Please enter the name of the news subscription you value most, followed by your supplementary subscriptions. *Base: All that paid for a subscription/membership to a digital news service in the last year; range: Germany = 143 to Sweden = 431.*

Multiple subscriptions are becoming more common in mature markets

Across our sample, the majority of those paying take out just one subscription, but in the United States the median is now two. This means just over half of those paying take out subscriptions to more than one title. This may be because in the US there is now an increasingly wide range of subscription and membership options from large publishers and local papers – as well as for individual journalists (e.g. Substack newsletters or 'channel memberships' to YouTube creators). A growing minority of Americans, we find, now combine a national publication with a local provider or with a specialist publisher of some kind. Aggregators like Apple News+ are also playing a part. Elsewhere, we find respondents combining a national title with an international one such as the *New York Times*, often at a discounted price.

> ***If I want to live in a free and democratic society, I believe it is my duty as a citizen to support a free, independent, and fact-based press and media.***
>
> *M, 58, US*
> *Subscribes to nine publications including the New York Times, the Washington Post, the Indianapolis Star, The Economist, ProPublica, and the Guardian*

> ***Each provides a different perspective about different topics and fills different needs. They tend to provide accurate or alternative viewpoints.***
>
> *M, 58, US*
> *Subscribes to Wall Street Journal, The Athletic (Sport) Centre Daily Times (Pennsylvania), and the National Review (conservative opinion magazine/website)*

> ***Different [publications have different] strengths – Daily Telegraph for sports, New York Times for US news.***
>
> *M, 62, UK*

The pattern of multiple subscriptions seems similar to the way in which video-on-demand streaming services have developed, with a minority of the most interested taking out multiple subscriptions, or combining a dedicated premium subscription product (e.g. Netflix, Disney+) with a subscription to an aggregator or bigger bundle (e.g. Amazon Prime or YouTube Premium).

Future prospects

Subscriptions are beginning to work for some publishers but it is not clear that they will work for all consumers. Most people are not interested enough in news, or do not have sufficient disposable income to prioritise news over other parts of their life. Others may resist because they enjoy being able to pick from multiple sources and do not wish to be confined to one or two publications.

> ***It's online now. You've got Apps. It's literally everywhere so the need to pay for it, I don't really see it.***
>
> *F, 25, UK focus group*

I can get all the information that I need with the aggregator App that I use. My life revolves around my phone and whenever I have a free moment, I quickly check the news and don't see the need for any subscriptions.

M, 54, Germany focus group

There are a few places lately where I've wanted to look [news] up, but it's locked [behind a paywall]. But I'm not tempted to pay for it. I'll just not read it.

M, 26, US focus group

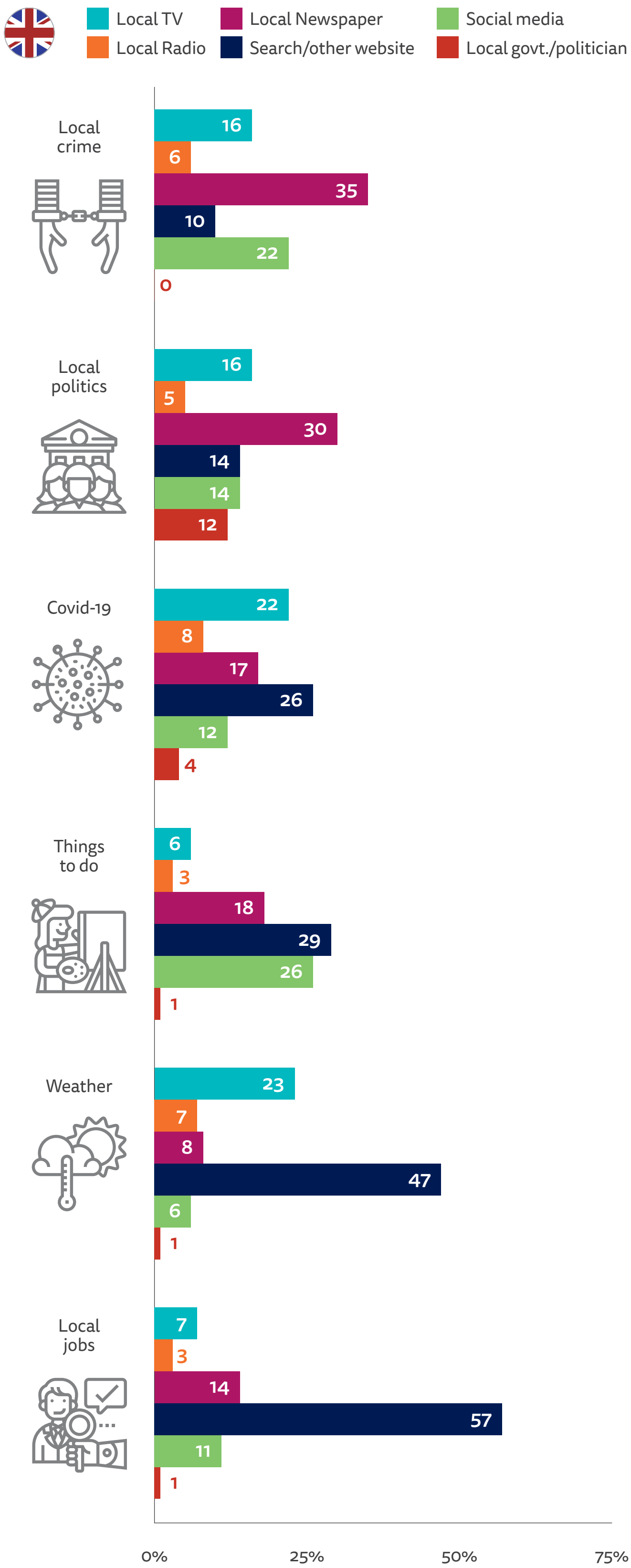
Amongst those who are not paying, just a small minority say they are likely to do so in the future for online publications that they like. Rates are higher in countries that are already some way down the line (16% in Norway) when compared with those that aren't (8% in the UK) which suggests that (a) there is still some room for growth even in mature markets, and (b) abundant supply of free news, whether from commercial or public service providers, is a key factor for some of those not currently paying.

THE FUTURE OF LOCAL MEDIA

The finding that some people in some countries are prepared to pay for local news in digital form will be encouraging to those who worry about the sustainability of local news media. A Poynter analysis found that, since Coronavirus began, more than 60 local news organisations in the United States have shuttered or temporarily closed.[7] But our survey also shows the extent of the disruption suffered by local media driven in large part by internet platforms – and the scale of the challenge they now face.

While people still think of newspapers as the best destination for local politics, in other areas search engines, internet marketplaces, or social media are now considered better or more convenient. Looking at the UK as one example (see chart right), audiences are more likely to use search engines and other internet sites as the best place to access weather or local jobs information, along with social media for recommendations about 'things to do'. Newspapers are not even the primary location for information about COVID-19, which has become easily accessed via a data visualisation in Google search results, from a social media feed, or from an official government website. By contrast, in Norway, local newspapers are seen as the 'go-to' source for politics (71%), crime (73%), Coronavirus news (53%), *and* things to do (46%). Only for weather and local jobs do Norwegians find greater convenience with internet sites or search engines (see chart overleaf). By this measure, Norwegians value their local newspapers more than twice as much as the British in every category.

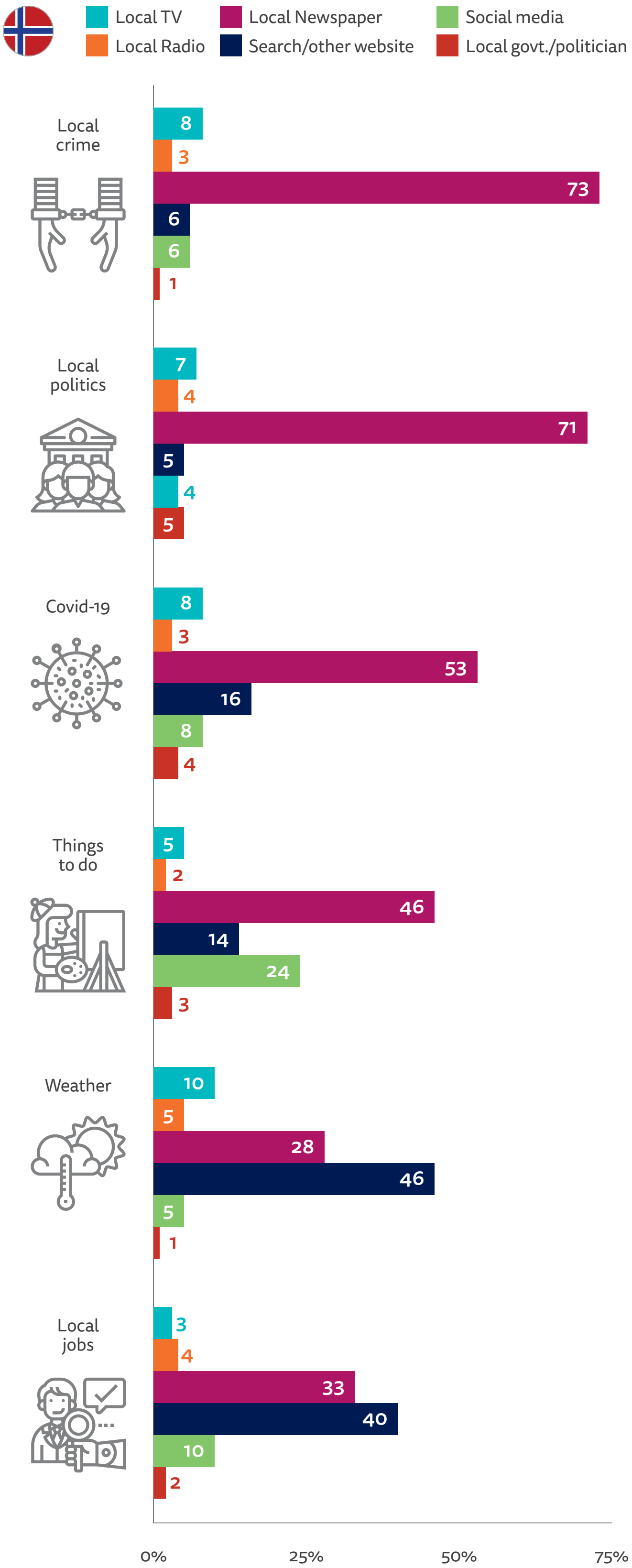
PROPORTION OF LOCAL NEWS USERS THAT THINK EACH IS BEST FOR THAT TOPIC – UK



L7_sources_2021. You said you have accessed local news and information about the following topic in the last week … Which sources offers the best information for you on this topic? *Base: All in each market that follows each topic; UK range: Things to do = 151 to Local weather = 1,101.*

[7] https://www.poynter.org/locally/2021/the-coronavirus-has-closed-more-than-60-local-newsrooms-across-america-and-counting/

PROPORTION OF LOCAL NEWS USERS THAT THINK EACH IS BEST FOR THAT TOPIC – NORWAY



L7_sources_2021. You said you have accessed local news and information about the following topic in the last week ... Which sources offers the best information for you on this topic? *Base: All in each market that follows each topic; Norway range: Local jobs = 320 to COVID-19 = 1,173.*

Our research this year also shows a link between how attached people are to their local community and levels of local news consumption. Respondents in both Austria and Switzerland are amongst those countries that feel most strongly attached and – like Norway – these are also countries where local news consumption tends to be higher and the value of local newspapers is more keenly felt. There may be many reasons for this, including geography, language, demographic make-up, or the extent of political control that is exercised at a local level. It is a different story in the UK (48% attached) and Japan (37%), which both have more centralised political systems and where more people live in big cities.

PROPORTION THAT FEELS VERY OR SOMEWHAT ATTACHED TO THEIR LOCAL COMMUNITY – SELECTED MARKETS

More attached		Less attached	
Austria	76%	UK	48%
Switzerland	70%	Japan	37%
Norway	69%	Colombia	33%
Germany	64%	Peru	32%

L5_attached_2021. In general, how attached do you feel to your local community, that is, the people who live in your city district, town, or village? *Base: Total sample in each market (n ≈ 2000). Note: Showing 'Very attached' and 'Somewhat attached'.*

None of this is to suggest that publishers in countries with more attachment are not also suffering from the impact of digital disruption. We see blind spots and decline in most markets, but the fact that local newspapers in Norway are still valued for a bundle of different information services gives them a stronger chance of persuading people to pay for online news. In the UK, by contrast, where internet and social media sites play a bigger role in media diets, there is more competition from local TV, and getting people to pay has proved much harder.

For further analysis see section 2.3: Local News Unbundled: Where Audience Value Still Lies

SHOULD GOVERNMENTS STEP IN?

Though many publishers, policy makers, and academics worry about the future of local (and national) media, our report this year suggests that most ordinary people don't share these concerns. Across countries, only around a third (31%) were aware that many commercial news outlets were less profitable than they were a decade ago and the majority (53%) are not worried about this. Just a quarter (27%) would support any government intervention to help commercial media, with another three in ten (29%) not having a view on the issue.

Only in a very small number of countries, such as Portugal, where the media have been especially hard hit by structural change, do we find more support than opposition (41%/35%) to the use of public money to help commercial media. Support is particularly low in Denmark (16%) and Sweden (22%), two countries with longstanding government subsidy schemes for commercial media. It is lowest in the UK (11%) – which may help explain why a review proposing more funding for public-interest journalism has effectively been shelved.[8]

[8] The Cairncross Review (Feb. 2019) made nine recommendations about the sustainability of the UK news industry. https://www.pressgazette.co.uk/government-response-cairncross-review-institute-news-save-uk-journalism/

PUBLIC ATTITUDES TOWARDS COMMERCIAL MEDIA FINANCING – 33 MARKETS

31% are **aware** that news is less profitable these days

53% are **not** concerned about financial state of commercial news media

27% would **support** government stepping in to help

Q. Financing1_2021. How concerned are you, if at all, about the financial state of commercial news organisations in your country? **Financing2_2021.** To the best of your knowledge, which of the following best describes the financial state of commercial news organisations in your country? **Q. Financing3_2021.** Should the government step in to help commercial news organisations that can't make enough money on their own? *Base: Total sample in 33 markets: 66,120. Note: We did not ask questions on commercial news media financing in Malaysia, Brazil, Argentina, Chile, Mexico, South Africa, Kenya, Philippines, Colombia, Indonesia, Nigeria, Peru and Thailand.*

Some governments have offered temporary support for publishers during the Coronavirus crisis in the form of furloughs, handouts, and tax relief, but it is not clear that there is currently public support for larger and more permanent interventions. There will be pressure to support many different parts of the economy over the next few years, especially health systems and education. Given the low levels of public awareness of the challenges facing the business of news, and low levels of support for government intervention – and more broadly low levels of trust in news in many countries – it is not clear that it will be politically attractive to prioritise supporting journalism at the expense of other priorities that enjoy greater public awareness and support.

For further analysis see section 2.4: How do People Think about the Financing of the Commercial News Media?

TRUST IS UP AND SO ARE TRUST GAPS

Overall trust in the news (44%) has rebounded strongly (+6) over the last year in almost all countries – as has trust in the sources people use most often themselves, which is up four points to 50%. Finland remains the country with the highest levels of trust (65%), having increased by nine points, while the US now has the lowest levels (29%). We also find a growing trust gap between the news sources people generally rely on and the news they find in social media and search, which remain unchanged on a like-for-like basis.[9]

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

Trust news overall
44% (+6)
Trust news I use = 50%

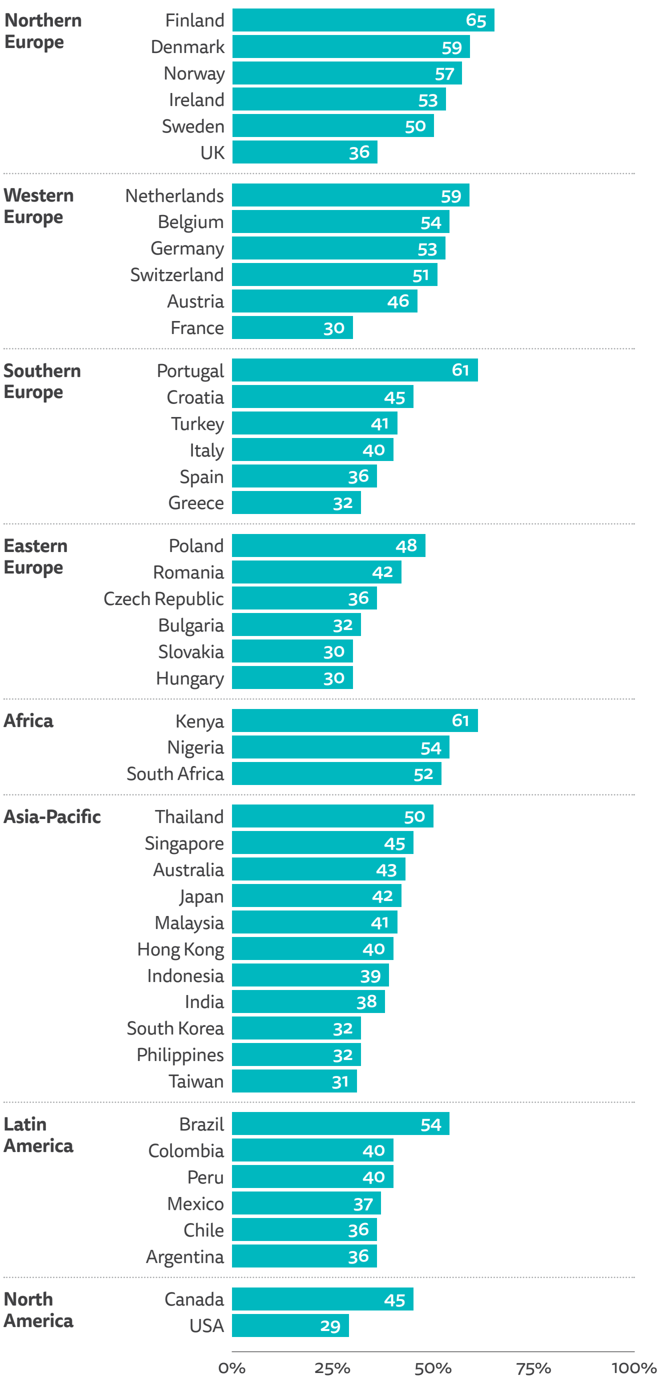
Trust gap has grown

Trust news in social media
24%
Trust news in search = 34%

Q6_1/2/3/4. Please indicate your level of agreement with the following statements: I think you can trust the news/news I use/news in social media/news in search most of the time. *Base: Total sample in all markets: 92,372.*

We can speculate that this higher trust in the news – and in the sources people use themselves – could be related to extensive coverage of Coronavirus. This may have made the news seem more straightforward and fact-based at the same time as squeezing out more partisan political news in some countries. The United States is clearly an exception following deep divisions over a 'stolen election' and the aftermath of the killing of George Floyd. The US is one of the few countries not to have seen an increase in trust this year.

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



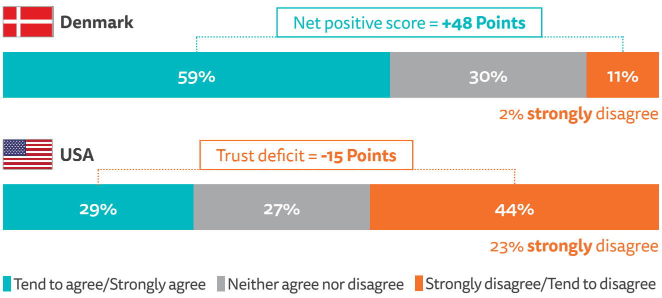
Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statements? – I think you can trust most news most of the time. *Base: Total sample in each market (most n ≈ 2000).*

[9] Taking the same 40 markets polled in 2020 we find trust in news at 43% (up five) and trust in social media unchanged at 22% and in search at 32%.

Some countries have a trust deficit

We can recut these figures to include the proportion that *dis*trusts the news. This gives us a good indication of how polarising the news media's reputation might be in particular countries. In the United States there are more people who distrust the news than trust it, leaving a deficit of 15 points. But in Scandinavian countries, like Denmark, a very small proportion say they distrust the news, leaving a large net positive score of 48 points.

NET NEWS TRUST AND DISTRUST – DENMARK AND USA



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: Denmark = 2005, USA = 2001.*

Political divides fuel much of this mistrust in the United States, with those who self-identify on the right being more than twice as likely to distrust the news compared with those on the left. Resentment and anger are stoked by polarised TV networks such as right-leaning Fox News, One America News, and Newsmax and left-leaning CNN and MSNBC.

Other countries with a net positive trust score include Finland and the Netherlands. Those with a deficit include Bulgaria (-12), France (-8), Hungary (-6), Chile (-4), and Argentina (-3).

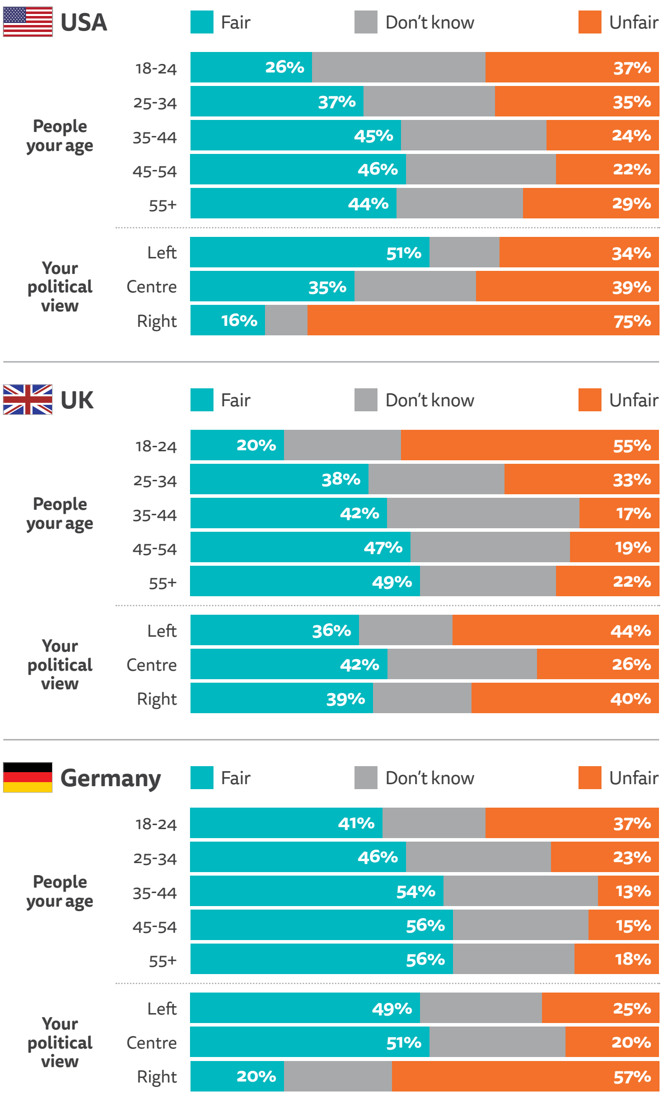
For further information about the background to these divisions see section 3: Analysis by Country and Market

PERCEPTIONS OF MEDIA FAIRNESS

Further evidence of what is driving mistrust comes this year in a series of questions we are asking about *fairness* of mainstream media coverage. We can compare these answers with information we hold about age, gender, ethnicity, education, and political views. In the United States we can use this data to see how attitudes towards the media are affected by politics. Three-quarters (75%) of those who self-identify on the right feel that media coverage of their views is unfair and this compares with just a third of those on the left. Younger people (U35s) are also more likely to feel that the media is unfair when compared with older groups.

By contrast, in the UK both the left and the right feel that their political views are unfairly covered by the media. Differences over age are even more stark, with the youngest group (U25s) feeling least fairly represented by the media. Gender differences are perhaps smaller than one might expect but more pronounced among younger people. In Germany, we find a similar problem with 18–24s and also with those on the right, who have weaponised terms like *Lügenpresse* (lying press) to express their unhappiness.

PROPORTION THAT THINKS THE NEWS MEDIA COVER PEOPLE THEIR AGE AND WITH THEIR POLITICAL VIEWS FAIRLY



Q. Div2_2021 Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? **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: 18-24/25-34/35-44/45-54/55+ and Left/Centre/Right in each country: UK = 205/312/322/361/839 and 358/1010/254; USA = 215/358/309/312/807 and 429/809/446; Germany = 194/314/308/379/816 and 265/1443/125. Note: a relatively small number of people self-identify as fairly right-wing or very right-wing in Germany.*

Across much of Western Europe we find it is the 18–24 age group that feels least fairly represented by the media and also that there is too little coverage of the issues they care about. This may explain why this group tends to embrace alternative and diverse views it finds in social media, with four in ten (40%) across markets saying this is now their *main* source of news. These findings may provide a starting point for news media genuinely interested in connecting with a younger generation – who are unlikely to pay attention to, let alone pay for, news that they often feel is both unfair and uninteresting.

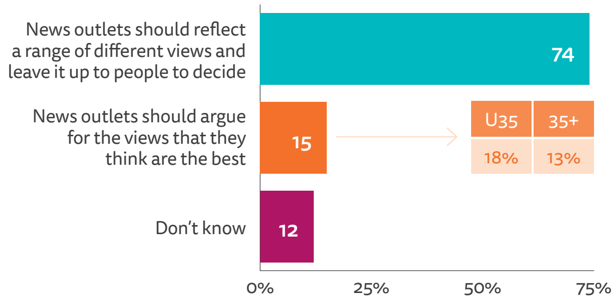
For further analysis see section 2.1: Perceptions of Fair News Coverage among Different Groups

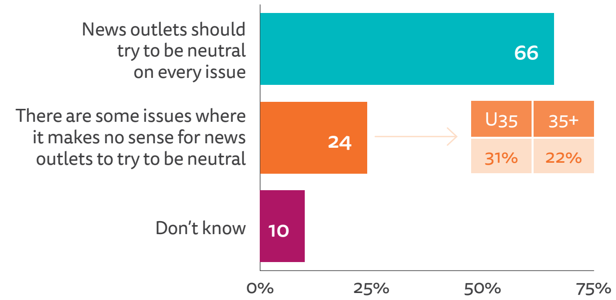
IN AN ERA OF GREATER POLARISATION, SILENT MAJORITY STRONGLY SUPPORTS IMPARTIAL AND OBJECTIVE JOURNALISM

The growth of online and social media has encouraged news organisations and individuals that take more overtly partisan positions than in the past. Online distribution has enabled an explosion of unregulated opinion in video, audio, and text. GB News is a new venture in the UK which aims to provide an alternative to what it claims is the 'liberal and metropolitan bias' of established news outlets, perhaps inspired by the commercial success of Fox News in the United States. All of this is putting new pressure on notions of impartiality and objectivity, which describe journalists' attempts to represent all sides fairly and without biases.[10]

Our survey, backed up by qualitative interviews in four countries, shows that the public still strongly supports the *ideals* of impartial and objective news, while recognising that they themselves are sometimes drawn to more opinionated and less balanced content.

PUBLIC ATTITUDES TO IMPARTIALITY – ALL MARKETS





Q_IMPARTIAL1_2021/2_2021. Thinking about the news in general in your country, when news outlets report on social and political issues, which of the following comes closest to your view? *Base: Total sample in all markets: 92,372.*

Across countries, around three-quarters (74%) of our sample think that news outlets should reflect a range of views rather than take a position about a news story. Most also think that news outlets should try to be neutral on every issue (66%) but a substantial minority (24%) feel that there are some issues where it makes no sense to try to be neutral. While their overall views are similar to the population at large, younger groups are slightly less attached to impartial or neutral news, especially in the case of some burning issues of social justice.

It's OK to lean to another side on [a subject] like domestic abuse and [for a journalist] to express an opinion on that, but with subjects like politics or COVID-19 it is really important to remain neutral, to allow the reader or listener or watcher to take decisions on their own.

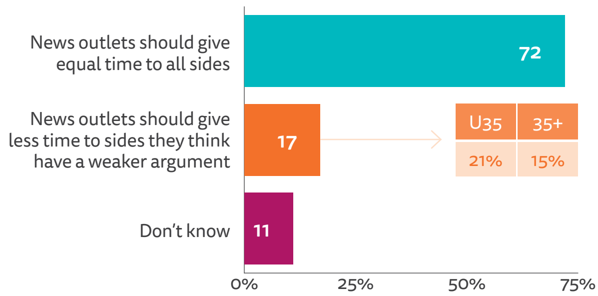
F, 21, UK Focus Group

Equal time for all sides?

Another key debate is the extent to which impartiality should involve trying to balance different views on social and political issues by allocating similar amounts of time to each side. Critics argue that this approach, when applied to an issue like climate change, can lead to a 'false equivalence', where one set of views underpinned by strong scientific evidence is 'balanced' by views that lack significant support – and thus create a false impression in the minds of the audience. Despite this, almost three quarters of our sample (72%) felt it was better to give the same amount of time to different views. Fewer than one in five (17%) felt less time should be given to those with weaker arguments.

When pressed, in focus groups, around specific examples (e.g. whether anti-vaxxers, racists, or climate change deniers should be given equal time), a more nuanced position emerges. In both the survey and focus groups younger groups were more likely to see the dangers in giving equal time to weaker arguments. The greater diversity in these generations and greater exposure to social media may make them more sensitive to the harm that can be done by extreme and hateful views.

PUBLIC ATTITUDES TOWARDS GIVING EQUAL TIME TO ALL SIDES – ALL MARKETS



Q_IMPARTIAL1_2021/3_2021. Thinking about the news in general in your country, when news outlets report on social and political issues, which of the following comes closest to your view? *Base: Total sample in all markets: 92,372.*

Many traditional media companies have been actively thinking about the implications of these complex questions. The new BBC Director General, Tim Davie, has declared that impartiality is more important than ever, but he says this does not mean that journalists cannot call out the truth or take a strong position if supported by the facts.[11] Guidelines may need to be updated to take account of changing consumer expectations as well as how journalists should conduct themselves in more informal settings such as social media and podcasts.

For further analysis see section 2.2: Impartiality Unpacked: A Study of Four Countries

[10] https://www.theguardian.com/commentisfree/2014/sep/05/does-journalism-still-require-impartiality
[11] Tim Davie, introductory speech as Director General, September 2020. https://www.bbc.co.uk/mediacentre/speeches/2020/tim-davie-intro-speech

MISINFORMATION AND THE ROLE OF CORONAVIRUS

Our survey this year shows that concern about misinformation is a little higher this year at 58% (+2). There is most concern in Africa (74%), followed by Latin America (65%), North America (63%), Asia (59%), and the lowest in Europe (54%).

To understand broad areas of concern we can break this down further into topics. This year people claim, on average, to have seen more false and misleading information about Coronavirus (54%) than they have about politics (43%). Other topics of false information relate to celebrities such as actors, musicians and sports stars (29%), products and services (22%), and climate change (20%). Only in Kenya does perceived exposure to political misinformation outstrip that about COVID-19.

PROPORTION THAT THINKS THEY HAVE SEEN FALSE AND MISLEADING INFORMATION ABOUT EACH OF THE FOLLOWING IN THE LAST WEEK – ALL MARKETS

54%
say they have seen misinformation about **COVID-19**
More in ... South Africa, Nigeria, Brazil, Romania

43%
say they have seen misinformation about **politics**
More in ... United States, Kenya

29%
say they have seen misinformation about **celebrities**
More in ... South Korea, Philippines

20%
say they have seen misinformation about **climate change**
More in ... United States, Australia

Q_FAKE_NEWS_2021a. Have you seen false or misleading information about any of the following topics, in the last week? *Base: Total sample in all markets: 92,372.*

Misinformation about COVID-19 has been a particular problem in African countries such as Nigeria and South Africa, where false rumours and conspiracies have spread quickly through social media.[12] Spread of false information about COVID is also widespread in Central and Eastern Europe (Czech Republic, Slovakia, Hungary, Romania, and Bulgaria) as well as in much of Latin America and parts of Asia.

Where does misinformation about Coronavirus come from?

In general, we find the highest level of concern about the behaviours of national politicians (29%) when it comes to spreading misleading information about COVID-19. This is highest in countries like Brazil (41%) where fact-checkers identified almost 900 false or inaccurate statements on the subject by President Jair Bolsonaro during 2020.[13] Concern was also high in Poland (41%) where the ruling Law and Justice party has been accused of politicising the pandemic, and in the United States (33%) where Donald Trump first suggested the virus would 'go away', downplayed the value of mask-wearing, and then suggested injecting disinfectant as a miracle cure.

PROPORTION THAT FINDS EACH MOST CONCERNING FOR COVID-19 MISINFORMATION – ALL MARKETS

29%
most concerned about behaviour of **politicians**
More in ... Brazil, Spain, Poland, Nigeria

16%
most concerned about behaviour of **ordinary people**
More in ... South Africa, Thailand

15%
most concerned about behaviour of **activists**
More in ... Netherlands, Australia

11%
most concerned about behaviour of **journalists**
More in ... Greece, Peru

9%
most concerned about behaviour of **foreign governments**
More in ... Mexico

Q_FAKE_NEWS_2021b. Thinking specifically about Coronavirus (COVID-19) and its effects, which of the following, if any, are you most concerned about online? False or misleading information from ... *Base: Total sample in all markets = 92,372.*

When it comes to the *channels* through which COVID misinformation is spread, we find that there is most concern about Facebook (28%), followed by news websites and apps (17%), WhatsApp and other messaging apps (15%), search engines (7%), Twitter (6%), and YouTube (6%). But we also find major country and regional differences.

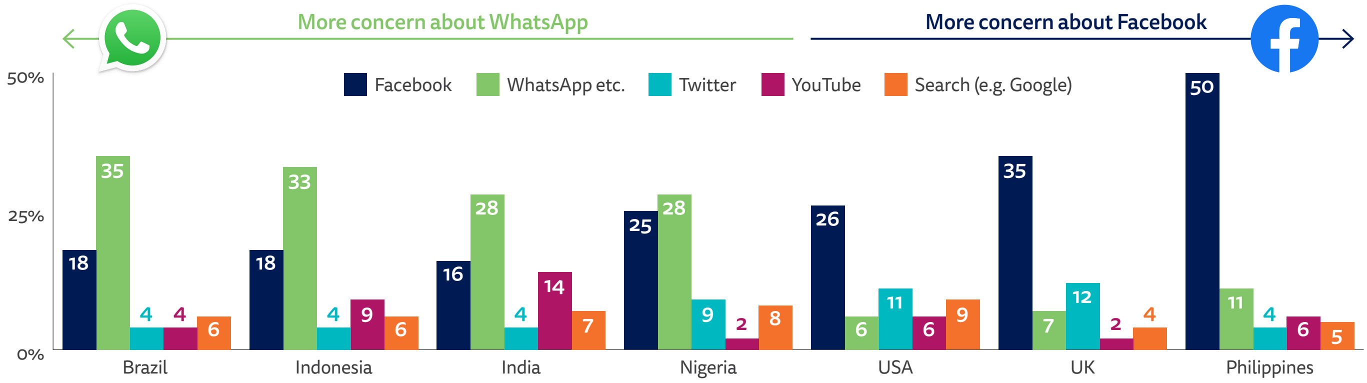
PROPORTION THAT FINDS EACH PLATFORM MOST CONCERNING FOR COVID-19 MISINFORMATION – ALL MARKETS

28% Facebook	15% Messenger apps	7% Search e.g. Google	6% YouTube	6% Twitter
More in ... Philippines, Slovakia	More in ... Brazil, South Africa, Colombia	More in ... Taiwan, Kenya	More in ... South Korea, India	More in ... USA, UK

Q_FAKE_NEWS_2021c. Thinking specifically about coronavirus (COVID-19) and its effects, which of the following, if any, are you most concerned about online? False or misleading information via ... *Base: Total sample in all markets = 92,372.*

[12] https://www.bbc.co.uk/news/world-africa-52819674
[13] https://www.statista.com/statistics/1118867/bolsonaro-fake-statements-coronavirus/

PROPORTION THAT FINDS EACH PLATFORM MOST CONCERNING FOR COVID-19 MISINFORMATION – SELECTED MARKETS



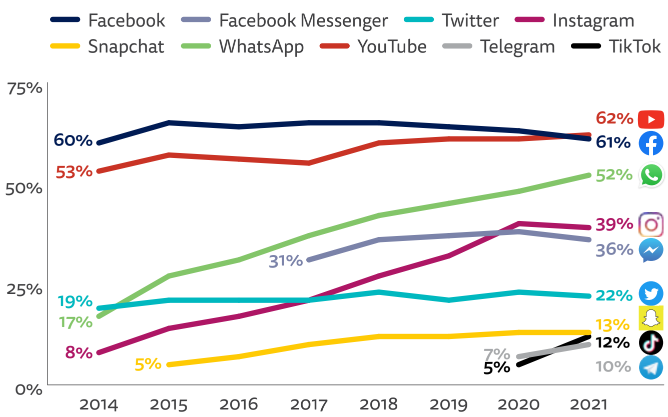
Q_FAKE_NEWS_2021c. Thinking specifically about coronavirus (COVID-19) and its effects, which of the following, if any, are you most concerned about online? False or misleading information via …
Base: Total sample in each market (n ≈ 2000).

In much of the Global South, including Brazil, Indonesia, India, Nigeria, and South Africa, messaging apps such as WhatsApp draw the most concern. The closed and encrypted nature of this network can make it harder for fact-checkers and others to spot and counter damaging information. By contrast, in the UK and US, Facebook is seen as the main concern, with Twitter perceived to be the next most significant network. Facebook is also the main concern in the Philippines and Thailand where it is the key platform for news.

MESSAGING APPS CONTINUE TO GROW; TIKTOK AND TELEGRAM MAKE THEIR MARK

For the last seven years, we have been tracking the changing mix of social networks (a) for any purpose and (b) for news. The following charts show the aggregate picture across 12 countries we have been tracking since 2014. YouTube now matches Facebook in terms of use for *any purpose*, having added 9pp over the last eight years. WhatsApp use (52%) has tripled over the same period and Instagram has grown five-fold, though it seems to be levelling off. TikTok and the messaging app Telegram are growing rapidly – the latter part of a continuing shift to more private networks.

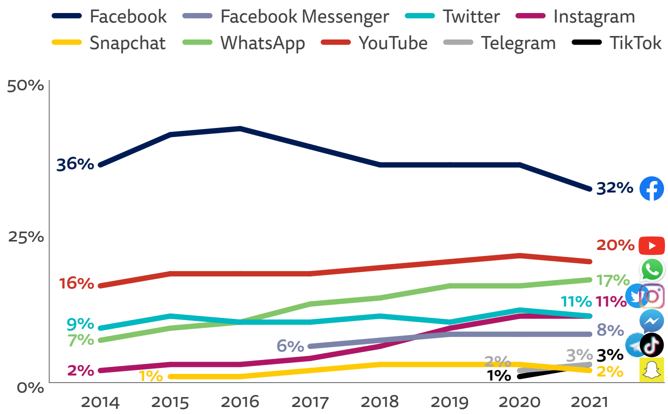
PROPORTION THAT USED EACH SOCIAL NETWORK FOR ANY PURPOSE IN THE LAST WEEK (2014-21) – AVERAGE OF 12 MARKETS



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

Across these 12 countries, around two-thirds (66%) now use one or more social networks or messaging apps for consuming, sharing, or discussing news. But the mix of networks has changed significantly over time. Facebook has become significantly less relevant in the last year, while WhatsApp, Instagram, TikTok, and Telegram have continued to attract more news use.

PROPORTION THAT USED EACH SOCIAL NETWORK FOR NEWS IN THE LAST WEEK (2014-21) – AVERAGE OF 12 MARKETS



Q12B. Which, if any, of the following have you used for news in the last week? *Base: Total 2014-21 sample in selected markets (most n ≈ 2000). Note: From 2015–21 the 12 countries included are UK, USA, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia, and Brazil. In 2014, we did not poll in Australia or Ireland.*

As previously noted, we find different patterns of usage in the Global South, with higher reliance on YouTube in Asia and more focus on WhatsApp and Instagram in Latin America and Africa. Telegram usage has doubled in some countries over the last year and is used for news by 23% in Nigeria, 20% in Malaysia, and 18% in Indonesia.

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

	Europe	North America	Asia	Latin America	Africa
Facebook	41%	35%	43%	59%	60%
YouTube	22%	25%	41%	32%	40%
WhatsApp	16%	7%	25%	40%	61%
Instagram	12%	11%	15%	24%	24%
FB Messenger	11%	13%	12%	12%	17%
Twitter	9%	12%	14%	15%	35%
Telegram	3%	2%	9%	5%	18%

Q12B. Which, if any, of the following have you used for news in the last week? *Base: Total sample in each market. Europe = 48,413, North America = 4037, Asia = 19,706, Latin America = 12,117, Africa = 6065. Note: Africa average is Kenya, South Africa and Nigeria only (English speakers in South Africa and Nigeria). We did not ask about Telegram in Colombia and Instagram in Thailand.*

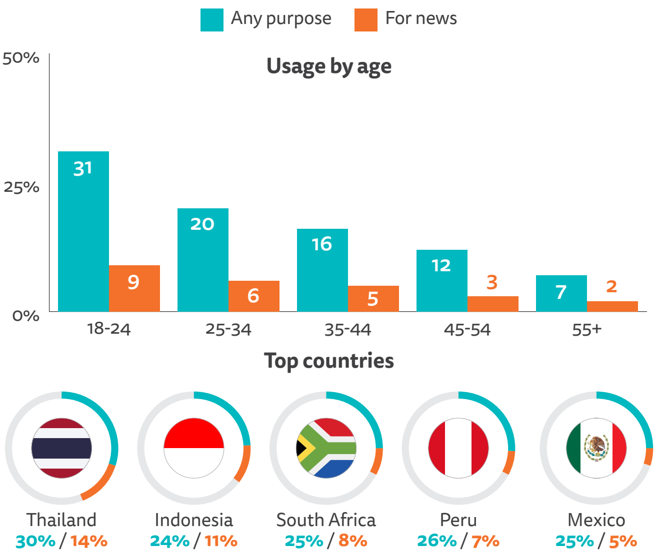
Next generation protest focused on newer networks

Newer mobile-based social networks like Instagram and TikTok have become central to a new wave of protests by younger people across the world this year. In Peru, anti-corruption protests were focused around the hashtag #semetieronconlageneracionequivocada (they messed with the wrong generation). TikTok, a vertical video platform that builds on Instagram and Snapchat stories, played a part in protests across Southeast Asia including Indonesia, Thailand, and Myanmar. In many cases, the authorities seem to have been blindsided by a platform that they don't understand – with its quirky sense of humour and its distinct language of musical memes, emojis, and hashtags.

Elsewhere it has been used to articulate solidarity around the Black Lives Matter movement or with the victims of Coronavirus.

> ***I came across celebrities trying to pass a message of solidarity to the people of Manaus [regarding Coronavirus].***
> *F, 24, Brazil*

PROFILE OF TIKTOK NEWS USERS – ALL MARKETS



Q12A/B. Which, if any, of the following have you used/used for news in the last week? *Base: 18-24/25-34/35-44/45-54/55+ in all markets: 8,572/13,539/13,795/13,087/27,738. Note: n ≈ 2000 for selected markets.*

News organisations have also been experimenting with a platform that is skewed towards the 'hard to reach' under-25 demographic. The *Washington Post* was an early pioneer using the platform, amongst other things, to encourage young people to vote. The BBC's Sophia Smith Galer has pioneered experimental storytelling on TikTok, such as creating a viral sea shanty about the blocking of the Suez Canal by a container ship, and the German public broadcaster ARD has built a quirky TikTok presence for its daily news show *Tagesschau*.

HOW MUCH ATTENTION DO NEWS ORGANISATIONS GET IN SOCIAL MEDIA?

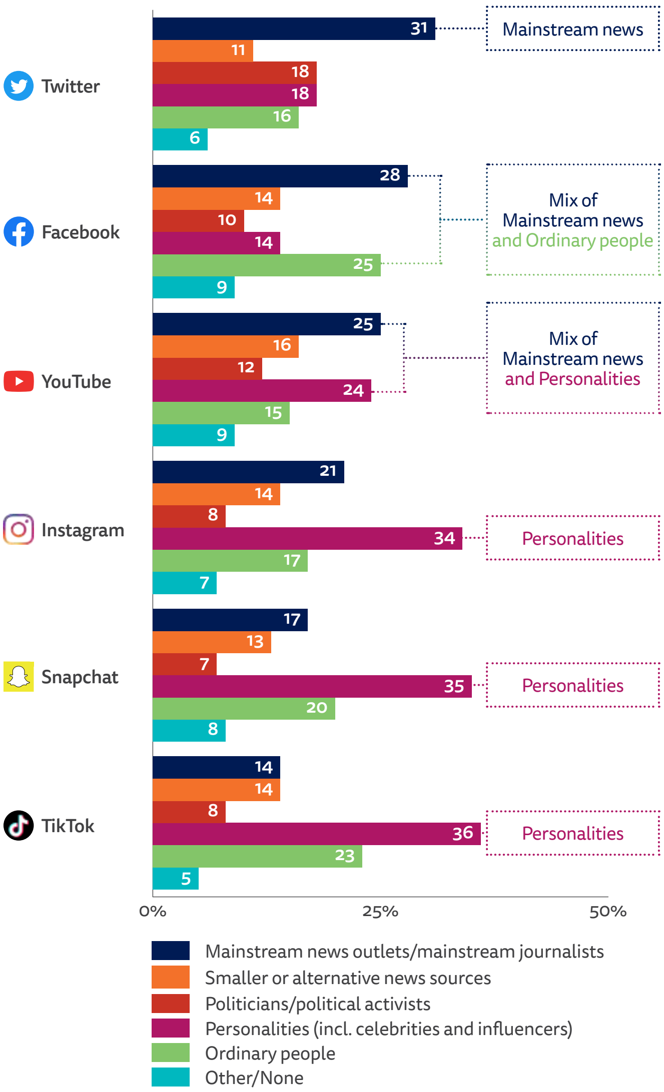
This little-researched question has been a key focus for our report this year as we dig more deeply into how people are using different networks for news. We know that many journalists put a lot of effort into cultivating their presence on Twitter and Facebook and to some extent this seems to be paying off. Across countries, our respondents say that they pay *most* attention to mainstream media outlets when consuming news in both Twitter (31%) and Facebook (28%) – considerably more than for politicians, alternative news sources, or other influencers. But the democratising impact of social media is also laid bare in the following chart, with significant attention going to the views of ordinary people across all networks, also for news. In networks such as Instagram, Snapchat, and TikTok, the focus is also firmly on personalities – such as celebrities or other influencers – leaving journalists playing second fiddle, even when it comes to news.

What are the motivations for using different social networks for news?

When asking people to choose their main motivation for using a network, we find clear differences between Twitter, which users see as a good place to get and debate the latest news, and other networks like Facebook, where people are 'mainly there for other reasons'.

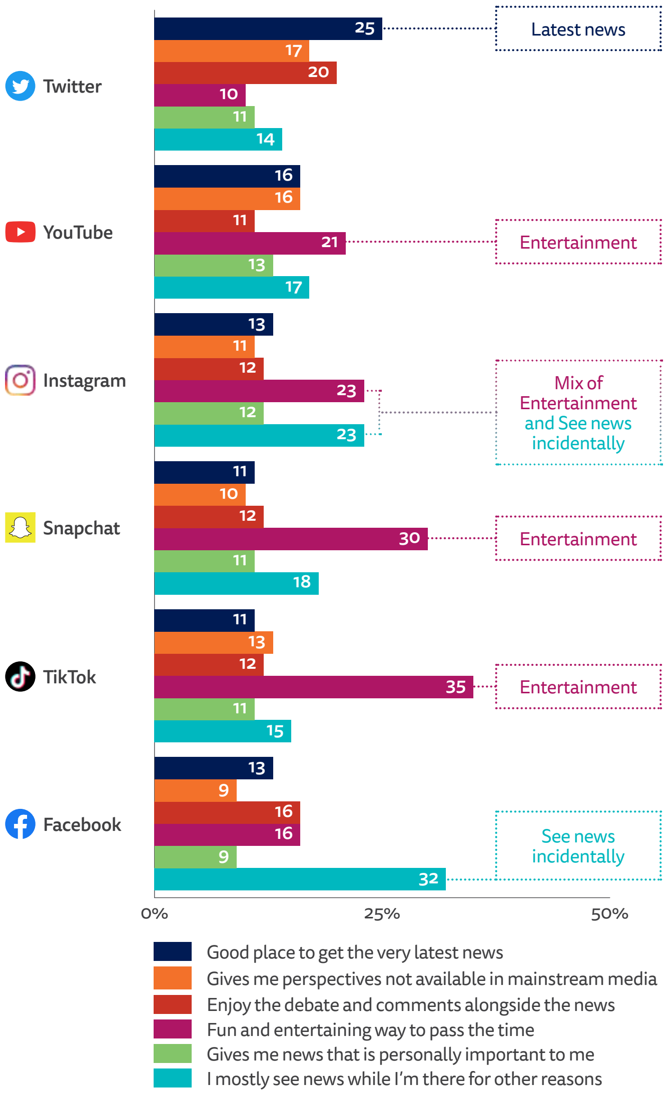
Instagram, Snapchat, and TikTok are very clearly seen as a fun and entertaining way to pass the time, in keeping with the younger and more playful nature of these networks in general. YouTube news users have a range of motivations, including a strong focus on looking for alternative perspectives on the news.

WHO PEOPLE PAY MOST ATTENTION TO WHEN USING EACH SOCIAL NETWORK FOR NEWS – ALL MARKETS



Q12_Social_sources. You said that you use <social platform> for news ... When it comes to news on <social platform> which of these do you generally pay most attention to? *Base: All that use Twitter/Facebook/YouTube/Instagram/Snapchat/TikTok for news in all markets: 6338/28,762/15,663/6570/924/1500. Note: See section 2.5 for more details on how we collected this data.*

MAIN MOTIVATION FOR USING EACH SOCIAL NETWORK FOR NEWS – ALL MARKETS



Q12_Social_motivations. You said that you use <social platform> for news ... What is the MAIN reason that you use <social platform> for news? *Base: All that use Twitter/Facebook/YouTube/Instagram/Snapchat/TikTok for news in all markets: 6338/28,762/15,663/6570/924/1500. Note: See section 2.5 for more details on how we collected this data.*

There are exceptions, however, to this general pattern. In Malaysia and the Philippines Facebook has become much more of a destination for news than Twitter, while in South Africa YouTube is also popular for latest news. In Brazil people routinely access news across four or five different networks, using them for subtly different purposes.

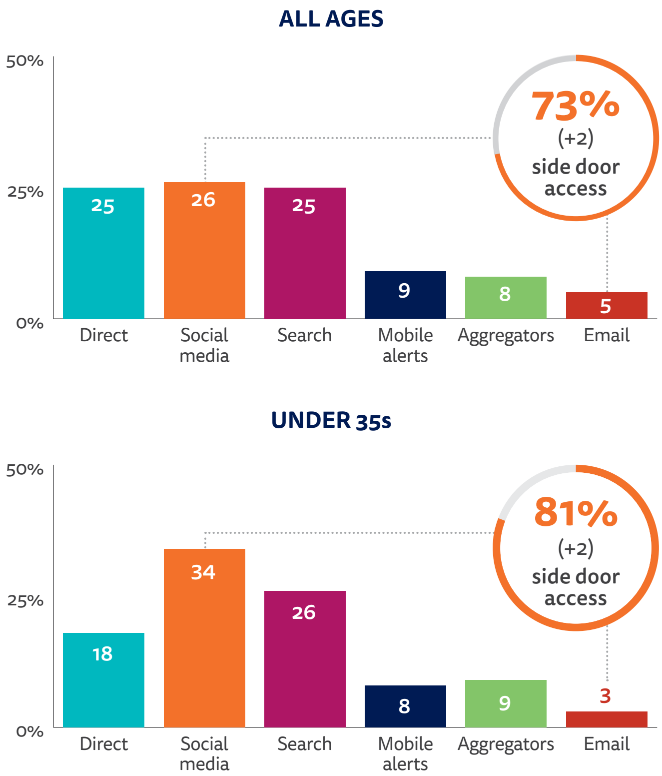
Newer youth-orientated networks represent a significant challenge for mainstream media. News is largely incidental and the expectations of snappy, visual, and entertaining content do not always come naturally to newsrooms staffed by older journalists with a focus on traditional formats. As we have seen, experiments are ongoing but tapping into these networks with timely, relevant, and engaging content remains a work in progress.

For further analysis see section 2.5: How and Why do Consumers Access News on Social Media?

GATEWAYS AND INTERMEDIARIES

In terms of access points, habits continue to become more distributed as 'younger' preferences for social media and search become more mainstream. Across all countries, just a quarter (25%) prefer to start their news journeys with a website or app – down three percentage points compared with last year and down seven points compared with 2018. Under-35s have a weaker connection with websites/apps (18%) and are much more likely to prefer to access news via social media (34%).

PROPORTION THAT SAYS EACH IS THEIR MAIN WAY OF COMING ACROSS NEWS ONLINE BY AGE – ALL MARKETS



Q10a. Which of these was the **MAIN** way in which you came across news in the last week?
Base: All/U35s that came across news online last week in all markets: 85,831/26,985.

These trends towards aggregation and social gateways are relentless, seem to have been unaffected by COVID-19, and explain why negotiations with publishers over money (e.g. Australia, France, UK) are so critical. Younger groups are not going to abandon the platforms and aggregators, which provide a quick and convenient way to check the news, but many publishers are unhappy with the current arrangement, which in most cases involves providing content in return for access to audiences. They argue that this approach is unsustainable, especially for expensively produced original reporting, and are demanding better terms, if necessary brokered by governments.

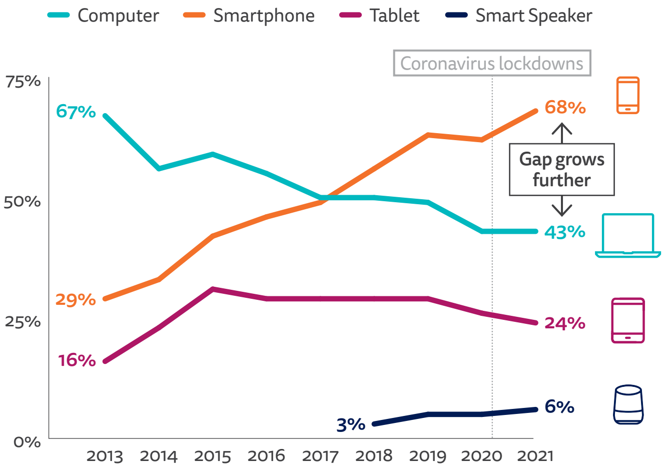
SMARTPHONE DEPENDENCE GROWS DURING LOCKDOWNS

Across countries, almost three-quarters (73%) now access news via a smartphone – up from 69% in 2020. Part of this is a continuation of trends which have seen the mobile phone overtake the computer as the primary access point in almost all countries, but Coronavirus may also have played a part. Governments around the world have focused on these personal devices to communicate on restrictions, to get citizens to report symptoms, and to book appointments for vaccines. Smartphones have become critical for keeping in touch with friends or booking takeaway food and drink – but also for discovering and consuming news. Computer news access by contrast has fallen from 49% to 46% (-3pp). We see smaller effects in some countries which have had fewer restrictions on movement such as Sweden and South Korea.

The next chart illustrates change over time in the UK, with the gap between smartphone and computer growing to 25 points. We also see an accompanying growth in the proportion of Britons accessing news more frequently.

> ***I tend to glance at my phone in-between things during the day so I think it's all again around timing, how quickly I can access it. I think my habits have definitely changed.***
>
> *F, 48, UK focus group*

PROPORTION THAT ACCESSED NEWS VIA A SMARTPHONE IN THE LAST WEEK – UK



Q8b. Which, if any, of the following devices have you used to access news in the last week?
Base: Total 2013-21 samples in the UK (n ≈ 2000).

It is worth noting, however, that Western Europeans tend to lag behind those in the Global South, where so many have grown up with the device as the primary gateway to the internet. Looking at three countries that are new to our survey (Indonesia, Nigeria, and Peru) we find much higher levels of smartphone use for news than in EU countries.

PROPORTION THAT SAYS EACH IS THEIR MAIN NEWS DEVICE – SELECTED MARKETS

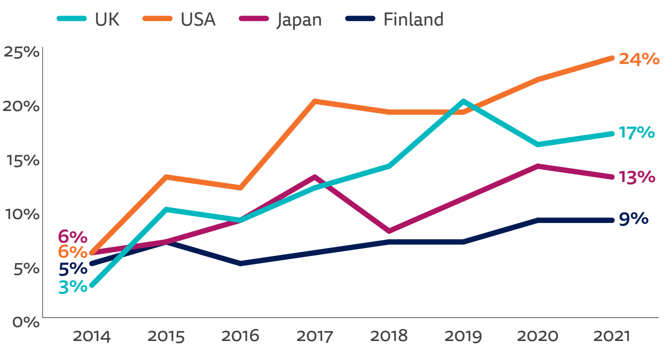
	Smartphone	Computer	Tablet
Indonesia	80%	11%	3%
Nigeria	80%	9%	3%
Peru	78%	7%	2%
EU Average	54%	30%	7%

Q8b6_5. You've said you use the following devices to access news in the last week, which is your MAIN way of accessing online news? *Base: All who used a news device in the last week in each market. Indonesia = 1904, Nigeria = 1978, Peru = 1823, EU = 36,756.*

Mobile aggregators and mobile alerts

As smartphones have grown in importance, so too have news alerts. In terms of weekly reach, they have tripled in most countries since 2014 and quadrupled in the United States, where they now reach around a quarter (24%) of the adult population. News alerts are used fairly evenly across age groups. Email is mainly used by older groups.

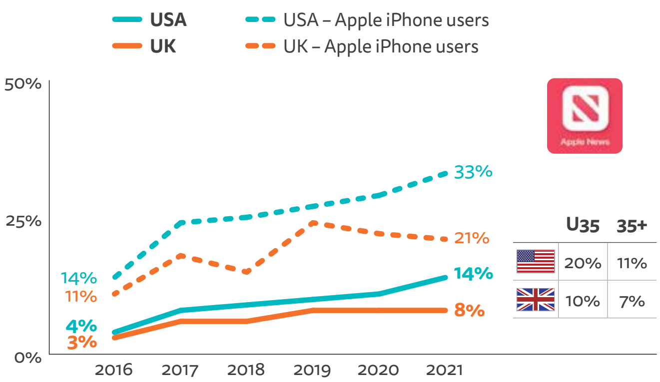
PROPORTION THAT RECEIVED A MOBILE NEWS ALERT IN THE LAST WEEK – SELECTED MARKETS



Q10. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which were the ways in which you came across news stories? *Base: Total 2014-21 samples in each market (most n ≈ 2000).*

Some of these alerts come from the apps of traditional media companies but mobile aggregators also seem to be benefiting. Apple News has grown significantly this year in the US, reaching a third of iPhone users, 14% of our overall sample, and 20% of under-35s.

PROPORTION THAT USED APPLE NEWS IN THE LAST WEEK – UK AND USA



Q10c. When using the internet for news, have you used any of the following sites or mobile apps that aggregate different news links in the last week? *Base: All/Apple smartphone users 2016-21: USA ≈ 2000/500; UK ≈ 2000/500.*

Mobile aggregators play a significant role in many Asian markets, including some of those that are new to our survey. Naver and Daum (Kakao) dominate in South Korea while Yahoo/Line is the major player in Japan. Line Today has gained impressive reach across Taiwan (44%), Thailand (36%), and Indonesia (20%), while India has a wide range of personalised mobile aggregators focusing on news and entertainment, including Daily Hunt, News Republic, and NewsPoint.

PROPORTION THAT USED SELECTED NEWS AGGREGATORS IN THE LAST WEEK – SELECTED MARKETS

South Korea		Japan	
Naver News	**66%**	Line News	**23%**
Daum News	**30%**	Smart News	**19%**
Kakao Talk News	**15%**	Gunosy	**11%**

Indonesia		India	
Line Today	**20%**	Daily Hunt	**23%**
Baca Berita	**18%**	News Republic	**19%**
LintasBerita	**8%**	NewsPoint	**15%**

Q10c. When using the internet for news, have you used any of the following sites or mobile apps that aggregate different news links in the last week? *Base: Total sample in each market (n ≈ 2000).*

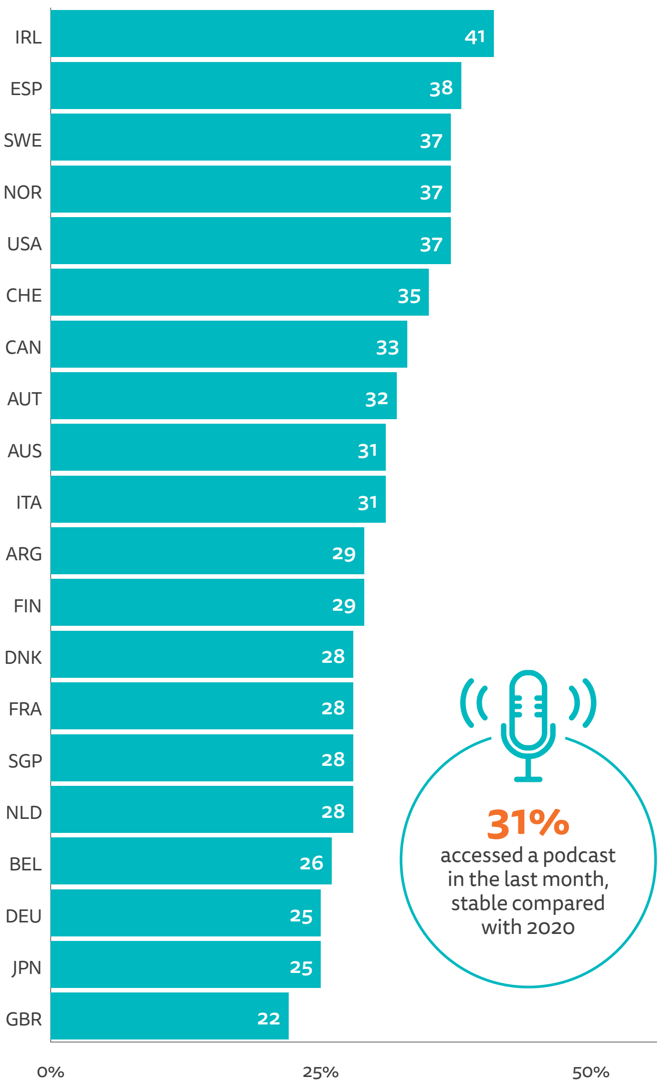
These mobile aggregators have taken off in Asia, partly due to bundling with local phone operators, partly due to the stronger penetration of Android devices, and partly because of a history of early mover advantage. But this does not fully explain regional differences. Upday comes bundled with many Samsung phones in Europe and Latin America but only reaches 8% in Brazil, 6% in Germany, and 4% in the UK.

PODCASTS AND THE RISE OF AUDIO

News podcasts, including those about Coronavirus, performed strongly in the early stages of the pandemic – in some cases reaching the top of the podcast charts (Newman and Gallo 2020). Podcasts have become a key part of many lockdown routines with more consumption at home – though there has also been disruption to the daily commute, traditionally a key time for listening. The net impact on consumption seems to have been neutral, with 31% accessing a podcast in the last month (the same as last year) across 20 countries where we feel confident the term is sufficiently well understood and where samples are not skewed by high levels of education.

Podcasts are particularly popular in Ireland (41%), Spain (38%), Sweden (37%), Norway (37%), and the United States (37%). Fewer people access podcasts in the Netherlands (28%), Germany (25%), and the UK (22%), though, as we've suggested before, this may be because many people are consuming from public service radio apps where they may be perceived as radio 'on demand' rather than podcasts.

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

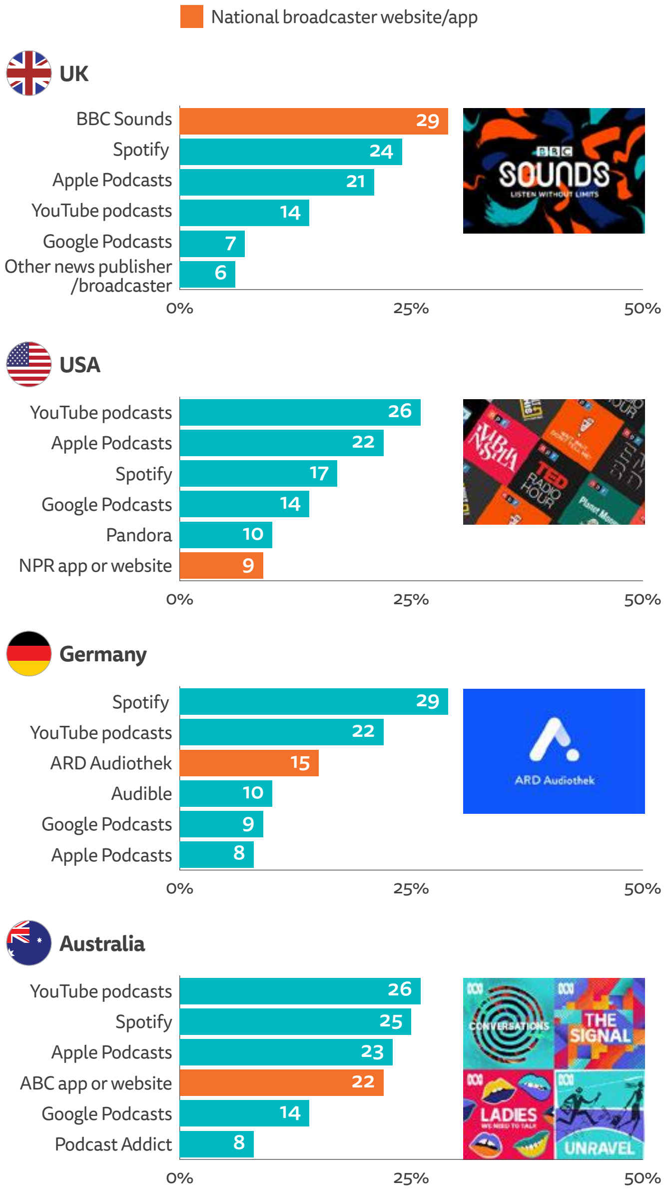


Q11F_2018. Which of the following types of podcast have you listened to in the last month? *Base: Total sample in selected markets (n ≈ 2000).*

Platform mix is changing

Spotify, Amazon, and Google have been investing in podcasts over the last few years as they seek to capitalise on surging demand and break Apple's dominance. Spotify reportedly paid more than $1m for exclusive rights to the Joe Rogan podcast and signed Barack Obama and Prince Harry and Meghan Markle to produce regular programming – as well as introducing video functionality into its app. The growth of video podcasting, accentuated by the use of tools like Zoom during the pandemic, is opening an even wider range of options for distribution and leading to more problems of podcast definition for researchers. All this activity is also changing the platforms through which consumers access podcasts. Spotify has overtaken Apple in some markets, YouTube is ahead in others, while public broadcasters play an important role in a few.

PROPORTION THAT USES EACH PODCAST PLATFORM – SELECTED MARKETS

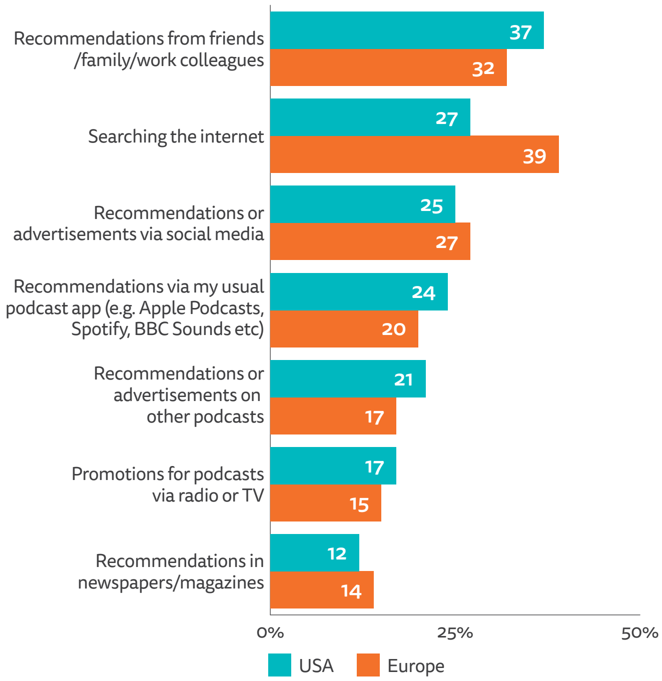


Q. POD2. Which of the following apps or websites do you mainly use to find and play podcasts? *Base: All that listened to a podcast in the last month: UK = 443; USA = 739; Germany = 527; Australia = 632.*

In the last few years there has been an explosion in the supply of podcasts with two million different shows now available in the Apple index. Demand for podcasts is not growing at the same rate, so discovery and awareness remain the biggest problems. Our data show that more people discover shows through recommendations from friends, family, or colleagues rather than promotion such as in-app recommendation or advertisements.

Search is also important, particularly in Europe, but the initial spark will often have come from a personal recommendation. Promotion via apps (e.g. Apple Podcasts, BBC Sounds) or via TV and radio trails or newspaper articles are also important for some.

WAYS IN WHICH PEOPLE DISCOVER NEW PODCASTS – EUROPE AND USA



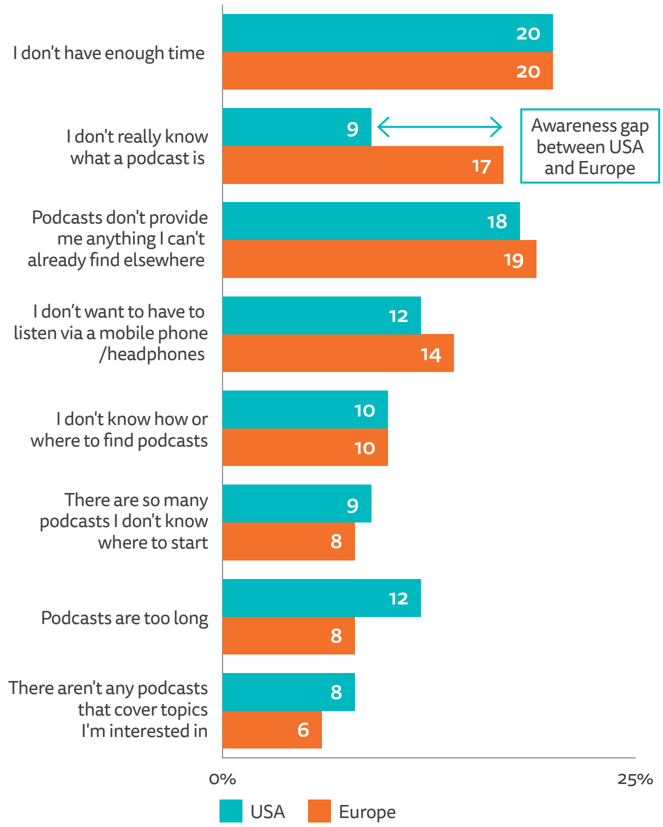
Q11F_podcast_discovery. How do you typically discover (new) podcasts to listen to? *Base: Those who listened to podcasts in the last month: USA = 753; Europe = 18,180.*

The commissioning of more high-quality original content by platforms is bringing audio programming to a wider and more mainstream audience, but it is also raising new questions for public broadcasters. Many worry that platforms will take much of the credit/attribution for public content and exert increasing control over access and discovery.

Europe and Asia lag behind the United States in awareness of podcasts

Awareness of podcasts is low in Japan, where 40% of those that don't use them say it's because they don't know what they are. The European average of 17% that are still not aware is almost twice as high as in the US, suggesting there could be an opportunity to grow with extra marketing and promotion. Others that are not yet using them say that podcasts are too long, or that they don't know how to find good ones. Others still say they don't have enough interest or enough time. These may be harder dials to shift.

MAIN REASONS WHY PEOPLE DO NOT USE PODCASTS – EUROPE AND USA



Q11F_NOTLISTEN. You say you have not listened to any podcasts in the last month. What are the main reasons for this? *Base: All that have not listened to a podcast in the last month: USA = 1248; Europe = 30,234.*

Overall, podcasts remain a fast moving and dynamic part of digital consumption. They are of particular interest to publishers because they attract younger and more affluent users that are highly sought by advertisers – and are potentially the next generation of subscribers.

Smart speakers could drive further audio growth

The shift to audio is being driven by new devices such as smart speakers and by platform services such as short podcasts or other audio items that can be called up using voice interfaces. Amazon and Google are the key market makers here and both have a renewed focus in promoting innovative audio formats including podcasts. Smart speakers now reach more than a fifth of the UK adult population (22%) and 15% in the United States and Germany. But only a minority use the devices for any kind of news (6% in the UK and 5% in the United States).

CONCLUSION

This year's data contain some good news for publishers and for those worried about the future of the news industry. More people have sought out accurate and reliable information during this crisis with trusted, high-quality brands benefiting most in a number of countries. The overall trust gap between mainstream media and social media has also grown significantly. Some European public broadcasters can also take new confidence from data which show that audiences have valued their careful and impartial approach to the facts at a time when they have often struggled to keep up with rapidly changing behaviours. Commercial publishers that still rely on income from print or digital advertising have had a torrid time, but acceleration of digital plans as a consequence may put some on the long-term path to survival.

Consumers have rapidly adopted new digital behaviours during lockdowns and this is opening up new digital opportunities at the same time as highlighting the next set of challenges. Our report shows that subscription and membership is becoming a sustainable model for a growing number of high-quality and niche publications, and in a few countries for local media groups and individuals. But it is also clear that paid content is not a silver bullet for all publishers. Nor will it work for all consumers. The vast majority are still not prepared to pay for online news and with more high-quality content disappearing behind paywalls there are pressing concerns about what happens to those who have limited interest or who can't afford it.

Worryingly, our data also show a historic decline in interest in the news overall. In this respect, our findings that both political partisans and young people feel unfairly represented will be especially troubling for media companies looking to build engagement both across political divides and with the next generation. Indeed, one of the most striking findings in this year's data is the radically different habits of under-25s (so-called GenZ), even when compared with the millennials that came before them. These digital natives are less likely to visit a news website, or be committed to impartial news, and more likely to say they use social media as their main source of news. Deeply networked, they have embraced new mobile networks like Instagram and TikTok for entertainment and distraction, to express their political rage – but also to tell their own stories in their own way. Engaging these audiences is proving challenging for newsrooms that are mostly staffed by journalists who consume news in completely different ways.

In an era where news consumption has become more abundant, more fragmented, and more fractious, media companies face a choice. They can try to build a deeper relationship with a specific audience or demographic – representing and reflecting their views and aspirations. This journalism may need to take a clearer 'point of view' but could also build deep trust with that specific group. On the other hand, media companies could choose to try to bridge these divides with services that work for the largest number of people possible – something much of the public say they want. In this case, the challenge will be whether journalism that balances different points of view can engage audiences sufficiently but also avoid getting caught up in the partisan and cultural battles that have been such a feature of the last few years.

This tenth edition of the *Digital News Report* comes at a time of immense challenge for the news industry. Year after year we've witnessed the shift towards more digital, social, and mobile consumption – slowly chipping away at the business models as well as the confidence of many media companies. Now the shock of COVID-19 combined with accelerating technological change is bringing things to a head, forcing a more fundamental rethink about how journalism should operate in the next decade, as a business, in terms of technology, but also as a profession.

SECTION 2

Further Analysis and International Comparison

Richard Fletcher
Senior Research Fellow
Reuters Institute for the Study of Journalism

Craig T. Robertson
Postdoctoral Research Fellow
Reuters Institute for the Study of Journalism

Anne Schulz
Postdoctoral Research Fellow
Reuters Institute for the Study of Journalism

Rasmus Kleis Nielsen
Director
Reuters Institute for the Study of Journalism

Simge Andı
Postdoctoral Research Fellow
Reuters Institute for the Study of Journalism

2.1 Perceptions of Fair News Coverage among Different Groups

Richard Fletcher
Senior Research Fellow
Reuters Institute for the Study of Journalism

Diversity is now a key priority for many newsrooms across the world. Although improving diversity has been a decades-long process for some news organisations, political shocks like the election of Donald Trump in the US and Brexit in the UK prompted some to ask whether newsrooms primarily staffed by relatively wealthy, urban, liberal-minded journalists could ever really understand people who think, vote, and live differently to them. More recently, the #MeToo movement has raised questions about journalism's ability to report on women fairly, and although deeply concerning to many for some time, the Black Lives Matter protests – in the UK in addition to claims made by Meghan Markle in a high-profile interview with Oprah Winfrey, and how the Society of Editors initially responded – have reignited critical examination of how the news media handles race and ethnicity.

To better understand how audiences think about how the news media cover people like them, we asked our respondents whether they think the news media cover people their age fairly or unfairly, and repeated this with respect to their gender, ethnicity, social and economic class, and where they live. We then analysed the responses for different groups (e.g. men and women, younger and older, etc.) to see which groups, on average, think they are being covered fairly by the news media. Of course, some people will have views on how the media cover groups to which they do not belong – but we cannot say anything about those views here because it is difficult to capture these views in a survey without asking about each category within a group separately, and this can quickly become impractical.

It is also important to highlight two further points. First, although many journalists and media industry observers have strong views on some of these issues, a substantial minority of respondents will always select 'Don't know' when asked about their views on specific aspects of media coverage – either because they don't pay enough attention to news to have a view, or because they think it depends. ('Don't know' responses are more common among those with low news interest levels, suggesting they are mainly a result of disengagement.) Second, it should be kept in mind that people's perceptions of fairness in news coverage may not accurately reflect the true nature of that coverage. Research has shown that people can evaluate the same news content very differently, with some perceiving coverage as fair when it demonstrably is not, and others perceiving unfairness where there is none. But people's perceptions of fairness or lack thereof are real and important in themselves, regardless of whether we think they are empirically grounded, rational or irrational, justified or unjustified – as are the consequences they might have for, for example, trust. We believe they are critically important for journalists and news organisations to understand, even if knowing how to respond may also require a clear-eyed assessment of news content and newsroom practices, as well as newsrooms' staffing and organisational structures.

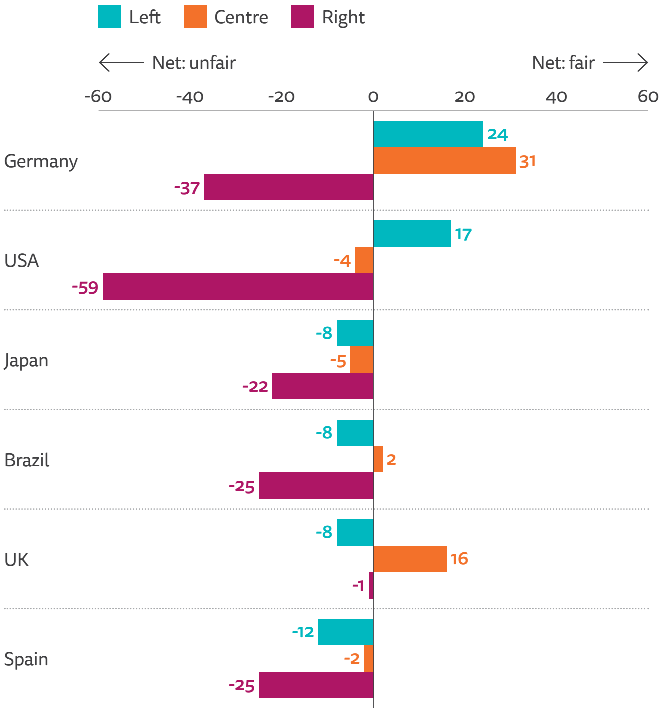
PARTISANS MORE LIKELY TO THINK COVERAGE IS UNFAIR

In the Executive Summary we saw that political partisans in Germany, the UK, and the USA think that the media cover their political views unfairly. Because a slightly different interpretation is possible if one focuses on the proportion that thinks they are covered fairly instead of unfairly, the data in this chapter will combine these two alternative figures into one: the net perceived fairness rating. This is simply the percentage that said they are covered fairly minus the percentage that said they are covered unfairly ('Don't know' responses are excluded).

The next chart shows the net fairness rating for the coverage of different political views. In the US, 75% of those on the right think they are covered unfairly, versus 16% that think they are covered fairly. Thus, for those on the right in the US there is a -59 percentage point (pp) net fairness rating. However, because more people on the left think that their political views are covered fairly rather than unfairly (51% versus 34%), for this group the net fairness rating is +17pp.

If we look at a small sample of six countries covering a range of different geographic regions and media systems – Brazil, Germany, Japan, Spain, the UK, and the US – we see that most politically partisan groups think that their political views are covered unfairly on the whole. The data from Japan, Brazil, and Spain fit particularly well with research on the 'hostile media' phenomenon, a long tradition of research showing that opposing political partisans both have a tendency to see media coverage as biased against them (Vallone et al. 1985). But at the same time, in most countries those on the right are more likely to think they are covered unfairly – perhaps influenced by a long-running narrative from right-wing politicians about media bias (the UK is relatively unusual in that this perception is more common among those on the left). That being said, although partisans do seem more sensitive about coverage of their views, we should be careful not to dismiss these perceptions entirely, as they may also be highlighting genuine concerns. Journalists and editors themselves often recognise a lack of political diversity within their organisations (Cherubini et al. 2020) – something that is also evident in surveys of working journalists (Thurman et al. 2016).

DIFFERENCE BETWEEN PROPORTION THAT SAYS THE NEWS MEDIA COVER THEM FAIRLY AND UNFAIRLY BY POLITICAL LEANING – SELECTED COUNTRIES

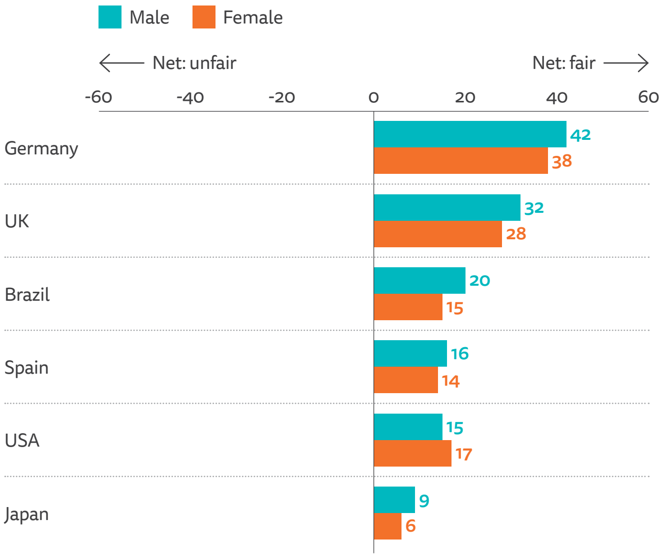


Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Div2_2021_1.** Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? *Base: Left/Centre/Right: Germany = 265/1443/125, USA = 429/809/446, Japan = 93/1251/152, Brazil = 397/705/477, UK = 358/1010/254, Spain = 530/916/214.*

WOMEN LESS LIKELY TO THINK THEY ARE COVERED FAIRLY, PARTICULARLY GenZ

Turning to audience perceptions among men and women, in the six countries that are our focus here, we can see that both women and men are more likely to say that the media covers them fairly rather than unfairly – a pattern that is repeated across most of the markets in our sample. In Germany, and in many of the other countries, very few men and very few women think that they are covered unfairly, leading to high net positive fairness ratings. Although the difference between men and women is small in the six countries we focus on here, across all markets women (+23) are less likely to think they are covered fairly than men (+31).

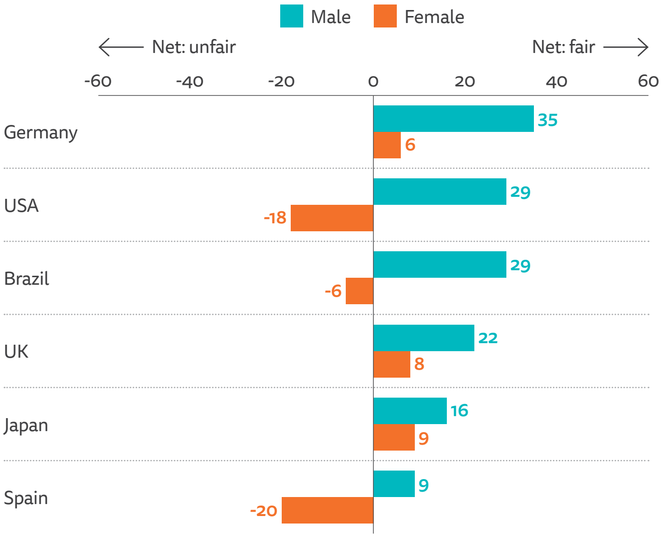
DIFFERENCE BETWEEN PROPORTION THAT SAYS THE NEWS MEDIA COVER THEM FAIRLY AND UNFAIRLY – SELECTED COUNTRIES



Div2_2021_3. Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? *Base: Male/Female: Germany = 1023/988, USA = 939/1062, Japan = 990/1014, Brazil = 995/1014, UK = 945/1094, Spain = 954/1065.*

However, this pattern breaks down when we focus on younger age groups. Looking at 18–24s only, we see that younger women are more likely to say that the news media covers them unfairly rather than fairly in Brazil, Spain, and the US. However, for men the generational differences are much smaller, with men of all age groups saying they are covered fairly on average. Clearly, there are large generational differences in how women think they are covered by the news media, with younger women offering a much less favourable assessment. This shows how different sociodemographic factors can intersect, with consequences for people's attitudes.

DIFFERENCE BETWEEN PROPORTION OF 18-24s THAT SAYS THE NEWS MEDIA COVER THEM FAIRLY AND UNFAIRLY – SELECTED COUNTRIES

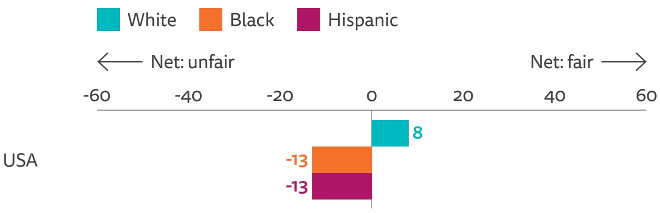


Div2_2021_3. Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? *Base: Male/Female: Germany = 101/93, USA = 114/101, Japan = 88/80, Brazil = 156/158, UK = 88/117, Spain = 65/87.*

NET FAIRNESS LOWER AMONG BLACK AND HISPANIC AMERICANS

As already mentioned, many news media have a problematic record in terms of how they have covered certain racial and ethnic groups, and are facing growing critical scrutiny over this issue. This is reflected in our survey data from the US. Here, although White Americans are more likely to think the news media cover them fairly, Black and Hispanic Americans are more likely to say people like them are covered unfairly. For both groups there is a -13pp gap between those that think people like them are covered fairly and those that think they are covered unfairly.

DIFFERENCE BETWEEN PROPORTION THAT SAYS THE NEWS MEDIA COVER THEM FAIRLY AND UNFAIRLY BY RACE/ ETHNICITY – USA



Div2_2021_5. Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? *Base: White = 1303, Black = 284, Hispanic = 193.*

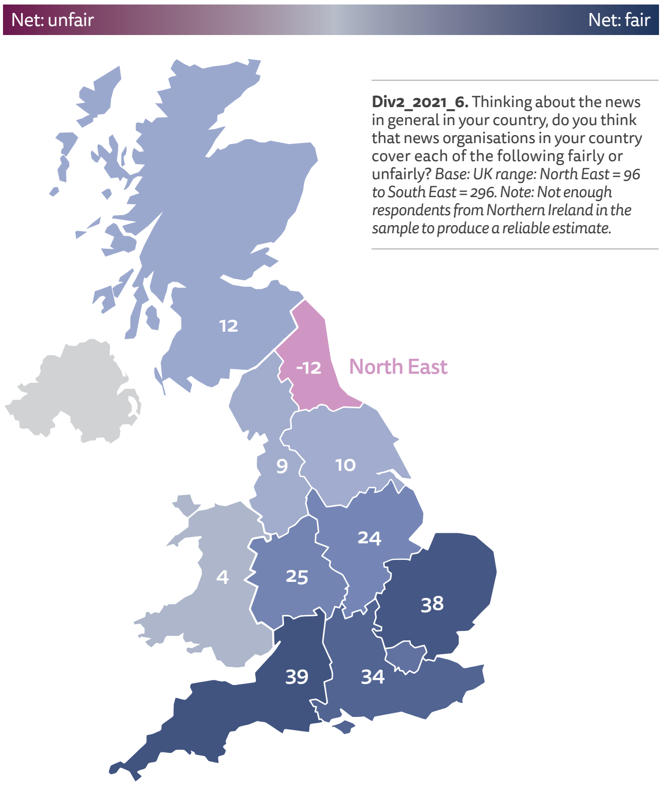
Similar important patterns may exist in many of the other markets included in our survey. However, these are often challenging to identify because – depending on the demographic make-up of the population – many minority ethnic groups are too small to analyse even with relatively large nationally representative survey samples. Although researchers sometimes group together different minority racial and ethnic populations so that they can be analysed, this can produce misleading findings if those populations have very different views.

REGIONS THAT PERCEIVE COVERAGE AS LESS FAIR

Some criticisms of the news media are rooted in how they cover life in particular parts of the country. In the UK, some see the media as too London-centric or perceive a North/South divide in how different regions are represented – criticisms that have prompted both the BBC and Channel 4 to move some of their operations out of London in recent years. Although most parts of the UK think where they live is covered fairly on average, this is clearly felt less strongly in the Midlands, the North of England, Wales, and Scotland than in London and the South. And most strikingly, more people in the North East say that where they live is covered unfairly as opposed to fairly – an area of the country that has seen little in the way of investment from media companies, and where life is portrayed in a way that many residents clearly don't recognise.

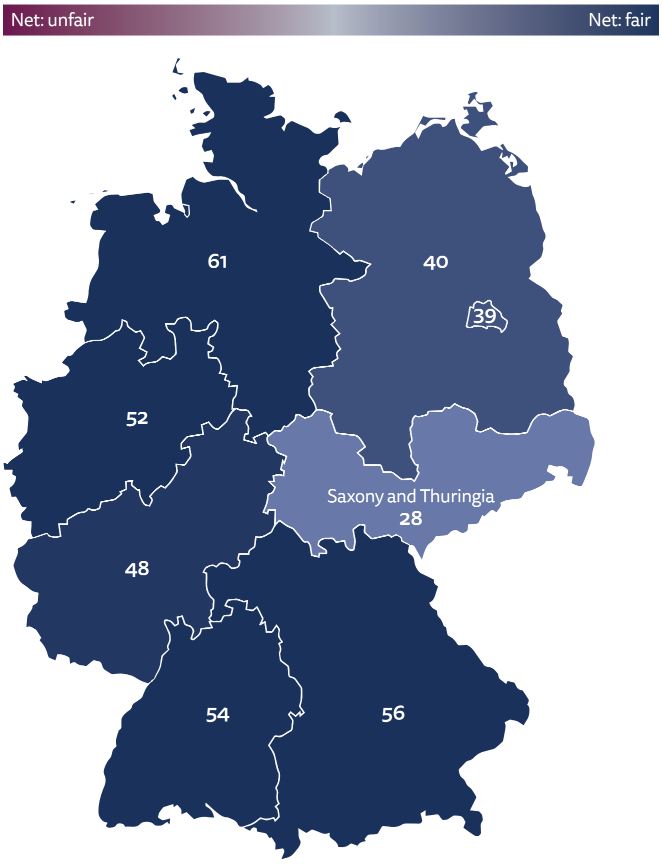
Although the specific underlying causes are likely to be very different, we can see a broadly similar pattern in Germany. Here, people who reside in states that were formerly part of East Germany, like Saxony and Thuringia, think that the news media cover where they live less fairly than those in much of the rest of the country – though only a relatively small minority say the coverage is unfair. In the US, those on the East and West Coasts think that where they live is covered fairly on average, though attitudes cool somewhat as we look further inland. In Southern states like Mississippi and Alabama, while 42% say where they live is covered fairly, 33% say the opposite. Although the question specifically asked people about the coverage of where they live, in all three countries it is possible that people's assessments are influenced by more general views about journalists and the news media as elitist, out of touch with people like them, or as opposed to their political views (Kreiss 2019).

DIFFERENCE BETWEEN PROPORTION THAT SAYS THE NEWS MEDIA COVER THEM FAIRLY AND UNFAIRLY BY REGION – UK



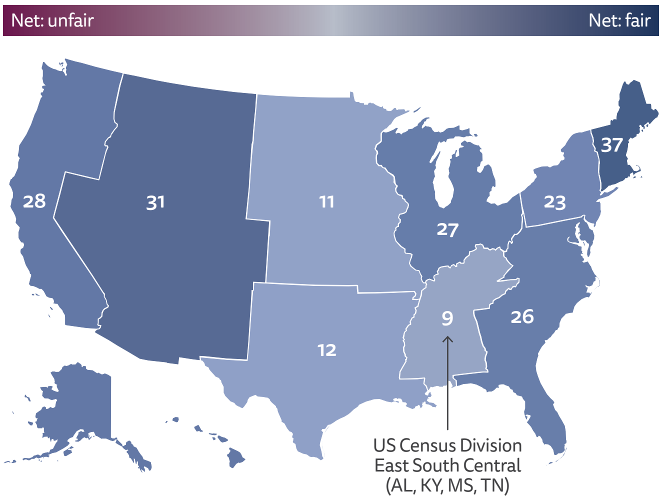
Div2_2021_6. Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? *Base: UK range: North East = 96 to South East = 296. Note: Not enough respondents from Northern Ireland in the sample to produce a reliable estimate.*

DIFFERENCE BETWEEN PROPORTION THAT SAYS THE NEWS MEDIA COVER THEM FAIRLY AND UNFAIRLY BY REGION – GERMANY



Div2_2021_6. Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? *Base: Germany range: Berlin = 93 to Nordrhein-Westfalen = 433. Note: some states are grouped to achieve usable base size.*

DIFFERENCE BETWEEN PROPORTION THAT SAYS THE NEWS MEDIA COVER THEM FAIRLY AND UNFAIRLY BY REGION – USA



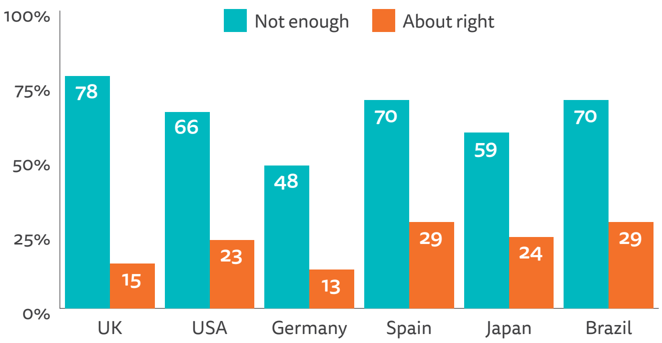
Div2_2021_6. Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? *Base: USA range: New England = 71 to South Atlantic = 403. Note: USA split into census divisions.*

UNFAIRNESS PERCEPTIONS RELATED TO LACK OF COVERAGE

People will likely have very different reasons for thinking that people their age, gender, political views, and so on, are covered fairly or not. One possible factor influencing perceptions of fairness is the amount of coverage devoted to particular topics. This is also a perception – and likely a perception of prominence rather than volume, since no one can consume all available news coverage.

Nonetheless, there is evidence that a lack of coverage of an issue is strongly related to perceptions of unfairness. Taking people's social and economic class as an example, three-quarters in the UK (78%) of those that think their social and economic class does not receive enough coverage will also perceive that coverage as unfair. But among those that think there is enough coverage of their social and economic class, just 15% think that the coverage is unfair. There are also large gaps in the other five countries. Interestingly, the data also suggest that if people think their social and economic class receives too much coverage – possibly because they think the focus should be on less privileged parts of society, or because the way they are being covered is inaccurate – this can also be associated with perceptions of unfairness. The hard part for news organisations is finding the right balance.

PROPORTION THAT THINKS THEIR SOCIAL AND ECONOMIC CLASS IS COVERED UNFAIRLY BY PERCEIVED VOLUME OF COVERAGE – SELECTED COUNTRIES

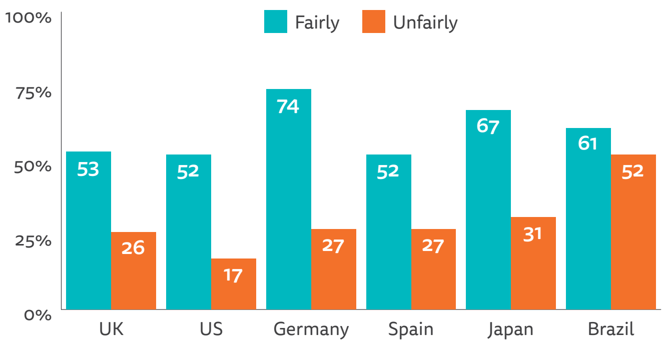


Div1_2021_4. Thinking about the news in general in your country, do you think that there is too much, about the right amount, or not enough news coverage of each of the following? **Div2_2021_4.** Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? *Base: Not enough/About right: Germany = 488/1031, Japan = 336/890, USA = 469/887, Spain = 440/985, Brazil = 670/883, UK = 317/1061.*

LINK BETWEEN FAIRNESS AND TRUST

Lastly, we see a clear link between perceptions of fairness and trust in the news. Returning to where we began the chapter – with people's political views – we see that people who think their politics are covered fairly will tend to have particularly high levels of trust in the news. If we look instead at coverage of some of the other topics touched upon in this chapter, we tend to see similar patterns. Of course, this could be because people who already have high levels of trust in the news are predisposed to see coverage as fair – but either way it is clear that trust and perceptions of fairness go hand in hand.

PROPORTION THAT TRUSTS MOST NEWS MOST OF THE TIME BY WHETHER THEY THINK THEIR POLITICAL VIEWS ARE COVERED FAIRLY OR UNFAIRLY – SELECTED COUNTRIES



Div2_2021_1. Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly? **Q6_2016_1.** To what extent do you agree or disagree with the following statements? – I think you can trust most news most of the time. *Base Fairly/Unfairly: UK = 739/563, USA = 636/871, Germany = 917/456, Spain = 627/801, Japan = 449/559, Brazil = 660/810.*

For those news organisations looking to increase their audience trust, it therefore may make sense to reflect on how they cover certain groups. The data here can reveal the fault lines in public attitudes, but the challenge for journalists and news organisations is deciding where to focus their efforts, what to do in practice, and how to speed up processes that often feel painfully slow.

When it comes to the question of where to focus, the sharpest divides in views on fairness are around the coverage of politics. But for many news organisations – particularly those already trying to uphold a commitment to impartiality and/or maintain a broad subscriber base – this will be the hardest area to make real progress in, especially if partisans are inclined to see unfairness in coverage no matter what. It therefore may make more sense to focus on areas – such as race, gender, and socioeconomic class – where researchers in some countries have sometimes found clear evidence that coverage often falls short of ideals or exacerbates problems. Even here, it remains the case that news media cannot necessarily please everybody. In the United States, some steps that might help build trust among those on the political right (primarily older and white) are unlikely to achieve the same with other groups unhappy with how they are covered (Black Americans, Hispanic Americans, and younger women).

The question of what practical steps to take is much tougher. Some news organisations have focused on representation. BBC journalist Ros Atkins's 50:50 project has shown how self-monitoring who is included in programming output can improve the representation of women, setting a template that has since been applied more widely across the BBC and in other news organisations. Some outlets have prioritised doing more to represent the views of those that live outside of big cities, and here the trend towards more remote working that has been accelerated by the Coronavirus pandemic may provide an opportunity to employ journalists with a genuine connection to under-represented areas. Then, finally, there is newsroom diversity. For some news organisations this has been a priority for many years, and as a recent survey of newsroom leaders showed, many believe that while they are making some progress on gender diversity, there is much more to be done when it comes to ethnic and socioeconomic diversity (Cherubini et al. 2020). The data we present here suggest that much of the audience is in agreement.

2.2 Impartiality Unpacked: A Study of Four Countries

Craig T. Robertson
Postdoctoral Research Fellow
Reuters Institute for the Study of Journalism

As the BBC observes, 'defining impartiality is easy ... it means reflecting all sides of arguments and not favouring any side'.[14] But what this looks like in practice can become complicated as journalists grapple with different topics, public debates, and ways of presenting engaging news. Moreover, many newspapers across the world have long had a clear editorial stance and, in the US, Fox News has demonstrated how money can be made from catering to partisan audiences in broadcast. Meanwhile, the BBC has renewed its commitment to impartial journalism, as have some commercial news media, such as Reuters. But partisan viewpoints are now more accessible than ever, especially online, and they can be attractive to audiences. This all raises the question: how important is impartial and objective journalism to audiences?

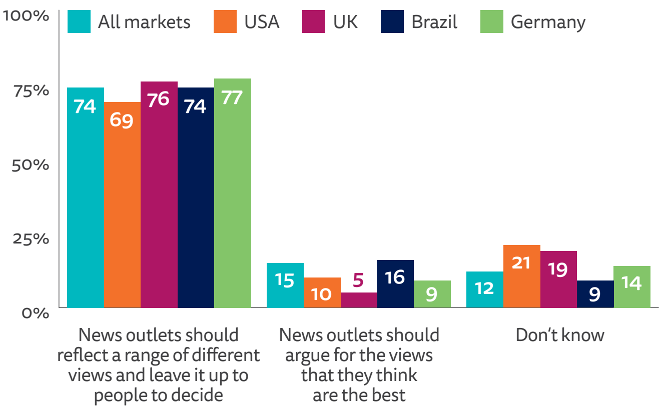
In this chapter, we explore what audiences want from news; whether that is impartial coverage or news which takes more of a point of view. We focus here on four countries – Brazil, Germany, the UK, and the US – with different news markets, traditions of public broadcasting, and systems of media regulation. To delve deeper into audience views, we supplement survey data with insights from focus groups and in-depth interviews in these markets, conducted from February to March 2021 with politically and racially/ethnically diverse groups of older and younger people interested in and engaged with news (52 people in total).

PEOPLE WANT NEWS OUTLETS TO PRESENT A RANGE OF VIEWS AND LET THEM DECIDE

One of the most basic questions when it comes to impartial reporting is: should journalists present a range of views in their reports leaving it up to the public to decide between them? This aligns with the idea that impartiality means treating different views fairly and without favour. In contrast, should certain views be promoted or argued in favour of? This point has been made, for example, with respect to the 2020 US Presidential elections: if claims of a 'stolen' election lacked evidence, it was appropriate to argue against this notion.

In our data, we find that a clear majority of people in all markets want news outlets, when reporting on social and political issues, to reflect a range of different views and leave it to them to decide. Few are in favour of news outlets 'arguing for the views that they think are the best'. There is slightly more support for this minority position among younger people (under-35s) and those on the political left, but it remains a smaller percentage. We note, of course, that views often depend on the subject matter. We asked generally about 'social and political issues', but views may have been different if we asked, for instance, about reporting on vaccines. Indeed, topical nuances are reflected in our focus group data.

MOST PEOPLE THINK NEWS OUTLETS SHOULD REFLECT A RANGE OF VIEWS – SELECTED MARKETS



Q_IMPARTIAL1_2021. Thinking about the news in general in your country, when news outlets report on social and political issues, which of the following comes closest to your view? *Base: Total sample in each market: All markets = 92,372, USA = 2001, UK = 2039, Brazil = 2009, Germany = 2011.*

[14] https://www.bbc.co.uk/editorialguidelines/guidance/impartiality

In general, among our focus group participants, the strong sentiment across the board is that people have the right to form their own opinions about issues, uninfluenced by the views of journalists. This is particularly so for more interpretive political issues, where people are uncomfortable with the idea of journalists making value judgements for them.

> ***With subjects on politics and, I think, with COVID-19 – with really more hard news – I think it is really important to remain neutral and allow the reader or listener or the watcher to make their decisions on their own about how they feel about something.***
>
> *F, 21, UK, left-leaning*

However, participants do note that there are some less interpretive topics (e.g. science stories, natural events) where journalists can present just one perspective or established point of view.

> ***If a dam breaks and floods a valley, there is only one view of that really: the dam broke and it flooded, so that is it. [But] I think it's very important for all journalistic delivery to be impartial when there are multiple viewpoints available.***
>
> *M, 58, US, centre*

Importantly, people delineate here between news reporting (where impartiality is expected) and opinion/commentary (where it may be expected that views are argued for) – though they say it can sometimes be difficult to distinguish between them as news outlets and formats are often seen to blend the two. Interviewees like news and they like opinion, but want them very clearly separated. Analysis falls between these and, though it brings a risk of perceived bias, is seen as more acceptable if provided by experts.

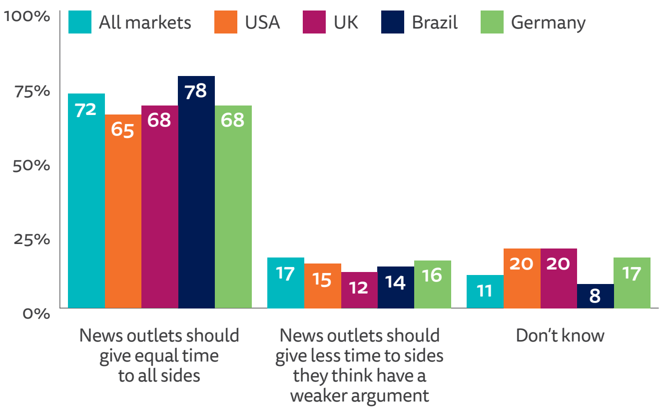
Focus group participants also acknowledge that impartiality is difficult the more informal a news format becomes but that this can be okay if, because of the format (e.g. podcasts, social media), points of view are expected. When sought out, the draw of more informal and opinionated styles – especially divisive broadcast presenters – is that they can be insightful and entertaining. While impartial reporting is the ideal standard, some interviewees do admit that it can be less engaging.

PEOPLE THINK EQUAL TIME SHOULD BE GIVEN TO DIFFERENT SIDES OF DEBATES

Next, when reporting on social and political issues, should news outlets give equal time to all sides or give less time to sides they think have a weaker argument? This question taps into debates about balance in news reporting and whether adherence to this norm can be detrimental, creating a 'false equivalence' such as when one perspective with scientific evidence behind it is 'balanced' against another lacking scientific support. This is an issue which has, in the past, been pointed out when it comes to coverage of climate change (Boykoff and Boykoff 2004; Hiles and Hinnant 2014).

So, what do our survey respondents think? Again, it is the same story: the majority of people in all markets think news outlets should give equal time to all sides. Only a minority think news outlets should give less time to sides with weaker arguments.

MOST PEOPLE THINK NEWS OUTLETS SHOULD GIVE EQUAL TIME TO ALL SIDES – SELECTED MARKETS



Q_IMPARTIAL3_2021. Thinking about the news in general in your country, when news outlets report on social and political issues, which of the following comes closest to your view? *Base: Total sample in each market: All markets = 92,372, USA = 2001, UK = 2039, Brazil = 2009, Germany = 2011.*

But, again, there is somewhat more support for this position among younger age groups (under-35s). Moreover, sizeable minorities of people on the political left think weaker arguments should be given less time: in Germany it is 24% (compared to 10% on the right), in the UK it is 22% (compared to 7%), and in the US it is 35% (compared to 5%). Among our interviewees from this group, when it comes to Donald Trump's false claims of a 'stolen' election, the scientific evidence for climate change, and Coronavirus vaccinations, there is less appetite for giving time to another 'side' that is seen to lack validity.

Yet people generally express discomfort with the idea of journalists excluding points of view entirely – especially on politicised issues – and say different voices should be heard. Due to this concern, the issue of 'false equivalence' in many ways does not resonate with interviewees. If it does, they tend to express concern about others being misled, less so themselves.

Often a more pressing concern is with the consequence of excluding (political) perspectives. They feel false equivalence can be avoided by properly framing different perspectives. In the US and UK, there is the view, particularly among older interviewees, that different perspectives should be subject to the marketplace of ideas: bad arguments will be shown to be weaker when presented against stronger ones. Some feel that a good approach is to bring in different sides, contextualise them, and let the evidence play out. And for interviewees in Germany, there is often seen to be value in shedding light on alternative views, even if they might be fringe perspectives.

> ***These [anti-vaccination] opinions exist, so we have to see them ... Do not just sweep it under the table and then suddenly be surprised that something exists. You have to acknowledge its presence.***
>
> *F, 47, Germany, left-leaning*

But it is acknowledged by some that balance may not need to be 50/50 in all cases: views shift with the topic. Particularly among younger people and those on the left, the view is that giving less time to a perspective can be acceptable if the weight of evidence is on one side (and especially if the alternative view is potentially harmful or not in the public interest).

Voices that are against vaccination, I think it is not appropriate to give them the same space as the space that is given for these pro-vaccination campaigns. Because it is a question that has already been proven and concerns the public interest.

F, 30, Brazil, left-leaning

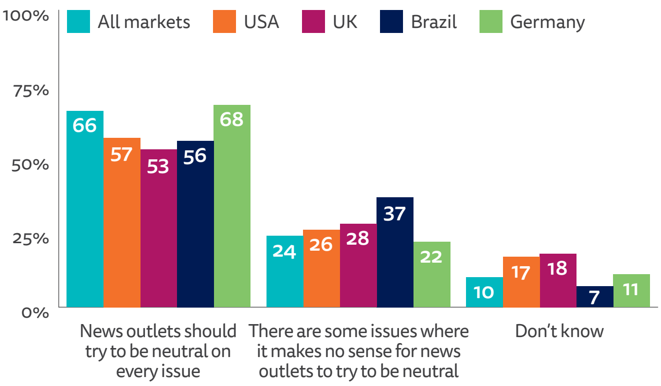
But, in general, across countries, interviewees say that different views should be acknowledged and brought into public discussion so they can be dealt with (even if they might not be afforded the same weight).

MOST PEOPLE WANT NEWS OUTLETS TO REMAIN NEUTRAL, BUT A LARGE MINORITY SAYS THIS SOMETIMES MAKES NO SENSE

Finally, are there are some issues where it makes no sense for news outlets to be neutral? This question taps into conversations around the lines that journalism should draw when it comes to certain social justice issues: does it make sense for journalists to be neutral about issues that do not have an 'opposing argument'? However, the alternative perspective here may be that journalists themselves should not give a view, instead remaining impartial and letting people with relevant knowledge and experience speak.

The story here is consistent with what we have found so far: the majority of people across markets think that news outlets should try to remain neutral.

MOST PEOPLE THINK THAT NEWS OUTLETS SHOULD TRY TO BE NEUTRAL ON EVERY ISSUE – SELECTED MARKETS

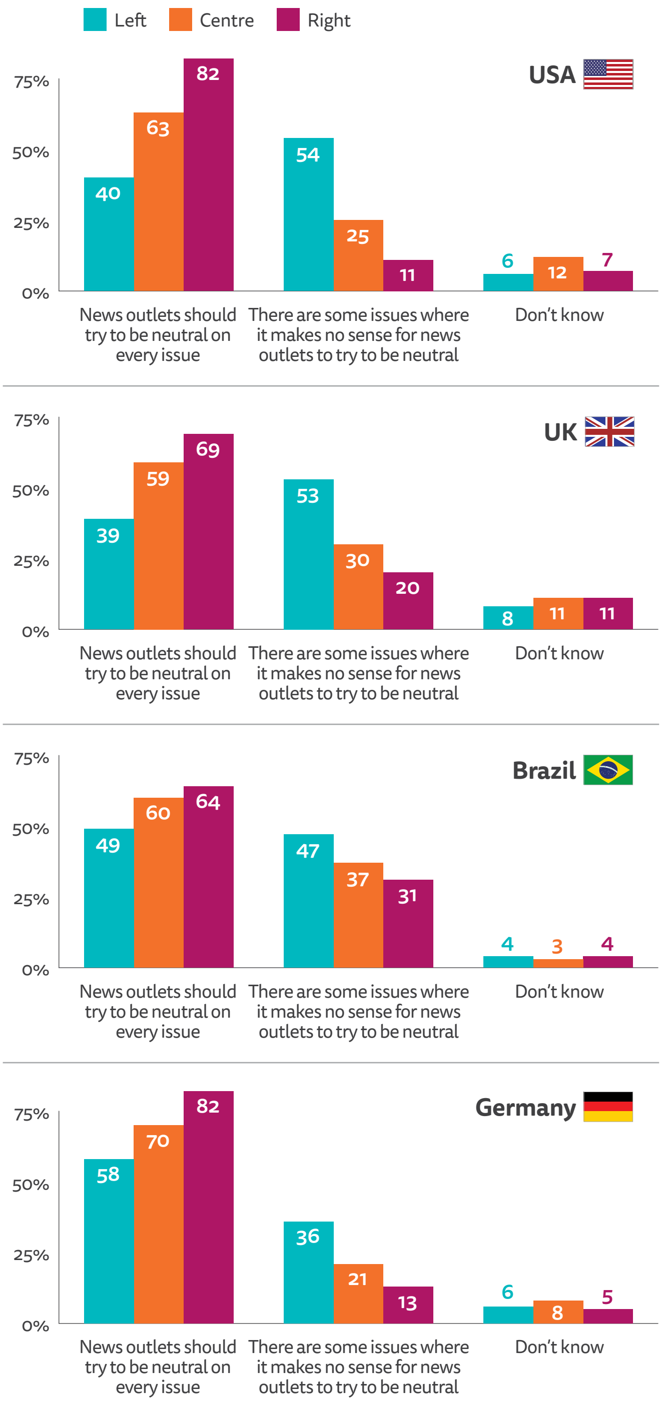


Q_IMPARTIAL2_2021a. Thinking about the news in general in your country, when news outlets report on social and political issues, which of the following comes closest to your view? *Base: Total sample in each market: All markets = 92,372, USA = 2001, UK = 2039, Brazil = 2009, Germany = 2011.*

Yet, compared with our other questions, a larger minority of people across markets do think there are some issues where neutrality does not make sense. It is also again clear who is more likely to be in this substantial minority: younger people and those on the political left.

Among those aged 18–24, 40% in Brazil, 34% in Germany, 38% in the UK, and 30% in the US think it makes no sense to be neutral on some issues. The percentage of those aged over 55 who think the same ranges from 19% in Germany to 30% in Brazil, with the US (22%) and UK (26%) in between. As for those on the political left, the percentage of people who think neutrality sometimes does not make sense ranges from 36% in Germany to over half in the US (54%).

VIEWS ON REMAINING NEUTRAL BY POLITICAL LEANING – SELECTED MARKETS



Q_IMPARTIAL2_2021a. Thinking about the news in general in your country, when news outlets report on social and political issues, which of the following comes closest to your view? **Q1F.** Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? *Base: Left/Centre/Right: Brazil = 397/705/477; Germany = 265/1443/125; UK = 358/1010/254; USA = 429/809/446. Note: A smaller number of people self-identify as right or far right in Germany compared to other countries.*

For younger people, it may be that, while they want facts, they are idealistic and see impartial news as less engaging, lacking authenticity, and failing to further social justice causes, instead perpetuating the status quo (Marchi 2012). For those on the political left, the danger of radical right-wing views and the scourge of racism emerge as reasons for not remaining neutral.

Indeed, issues of social justice inform people's position on neutrality, with some (especially younger and left-leaning) people saying there can be an ethical justification for being non-neutral. In the UK, US, and Brazil, the sentiment is that there is less need to be neutral when it comes to issues such as racism and domestic violence.

> ***I think as soon as you cross that border of something becoming illegal and just pure wrong, I don't think they should get airtime.***
>
> *M, 28, UK, left-leaning*

Meanwhile, in Germany, there is a strong feeling among most interviewees that different perspectives should be illuminated and presented impartially as part of democracy. But, because of Germany's history, the line is drawn when it comes to unconstitutional views.

> ***The showstopper for me is the constitution and criminal law. If the opinion breaks neither of those, which stuff like Holocaust denial [does break], then you can say what you want. If it does break those laws or also ends up hurting a person that way, then it should clearly be censored.***
>
> *M, 30, Germany, right-leaning*

CONCLUSION

Our survey and focus group data tell us that, while impartial or objective journalism is increasingly questioned by some, overall people strongly support the ideal of impartial news. People want the right to decide for themselves. That means journalists giving the facts plainly and simply, duly and fairly presenting different perspectives, not excluding points of view, and keeping their own opinions out of news reports (relying instead on those of interviewees). This is not easy to do in practice, or for every issue, and our focus groups show that the public understands that – but our data also suggest that recognising that complexity does not seem to dampen people's commitment to impartial news.

People's views do become nuanced the more they are explored. Some note that you can't be neutral about some fundamental principles (e.g. racism is a hard line) or matters of fact (e.g. human-induced climate change), acknowledge that expectations of impartiality and balance can vary by subject matter, and say evidence-based judgements (from experts) may sometimes be appropriate when the issue is definitive.

Older people and those on the political right tend to more strongly advocate for the inclusion of all perspectives. But among younger people and those on the political left, these feelings are weaker. It may be that these latter groups are more attuned to issues which make them think differently. Here, social movements like Black Lives Matter and #MeToo, which took off on the social media platforms that younger people turn to and which have found support on the political left, as well as concerns about rising science scepticism and right-wing extremism, inform views on the role of journalists in being more decisive. There is emphasis on journalism's duty to accuracy and to the facts, as well as to morality and social justice.

Yet even among this constituency there is a strong feeling that impartial journalism is important and there is a reluctance to have journalists favour one perspective or exclude points of view (unless they are harmful). Most people, once they have the facts, do want to be exposed to range of views.

Moreover, what our focus group participants tell us is that they recognise they are often drawn to partial news. But what people say they want is a reliable baseline of impartial, straightforward, factual reporting; beyond this, they can go off to explore opinions elsewhere where they *expect* to find them (e.g. social media, podcasts, chat shows, editorial pages).

> ***The BBC and ITV ... are renowned for being those staid sources. The advice [for them] is carry on what you are doing; don't go left, don't go right, sit there in the middle and report on what is happening. But if you don't have the alternatives, like those with a bit of partiality to them ... then wouldn't we all be in a boring world? To hear somebody else's point of view it is healthy.***
>
> *F, 43, UK, right-leaning*

A challenge for the industry is how to provide this desired mix – and how to make impartial and objective reporting engaging or entertaining without straying into partiality. This can become difficult, as people note, as platforms and formats (e.g. social media, podcasts) become more informal and genres more mixed or harder to tell apart. Practices of impartiality need to adapt to these new ways of producing and consuming news, but our evidence indicates that people strongly support impartiality ideals, even in countries with very different media systems and traditions.

2.3 Local News Unbundled: Where Audience Value Still Lies

Anne Schulz
Postdoctoral Research Fellow
Reuters Institute for the Study of Journalism

Local and regional news media are under immense financial pressure as audience attention and advertising budgets increasingly flow to big platforms and other competitors. Local newspapers in particular have been hit hard by disruption to both consumer behaviour and business models and the pandemic has only increased pressures. Across the world we have seen a spate of cutbacks and layoffs, and longstanding titles closing down. This is troubling because local and regional news media can play a critical role in informing citizens and underpinning democratic processes.

In this chapter we focus on identifying which local news topics matter most to audiences today and where they think they get the best information on each of them. This will help us see where local media still provide value and, potentially, where it would be most missed. Secondly, it will identify areas where people feel other sources such as social media, search engines, various websites from businesses and government, and even individual politicians, are providing valuable local news and information. Finally, we explore some of the country differences around the perceived value of local media to draw out lessons on why some local and regional news ecologies fare better than others.

Asking about local and regional news consumption across markets that vary strongly in terms of their geography, political and media structure is particularly difficult. To give respondents from everywhere a chance to relate to our questions, we opted for a broader understanding of what local and regional news can mean, covering 'news from the city or town, municipality or region that people currently live in'. However, it should be kept in mind that some markets vary considerably in terms of news supply at the local and regional level, so comparisons are not always straightforward.[15]

WHAT DO PEOPLE WANT TO KNOW?

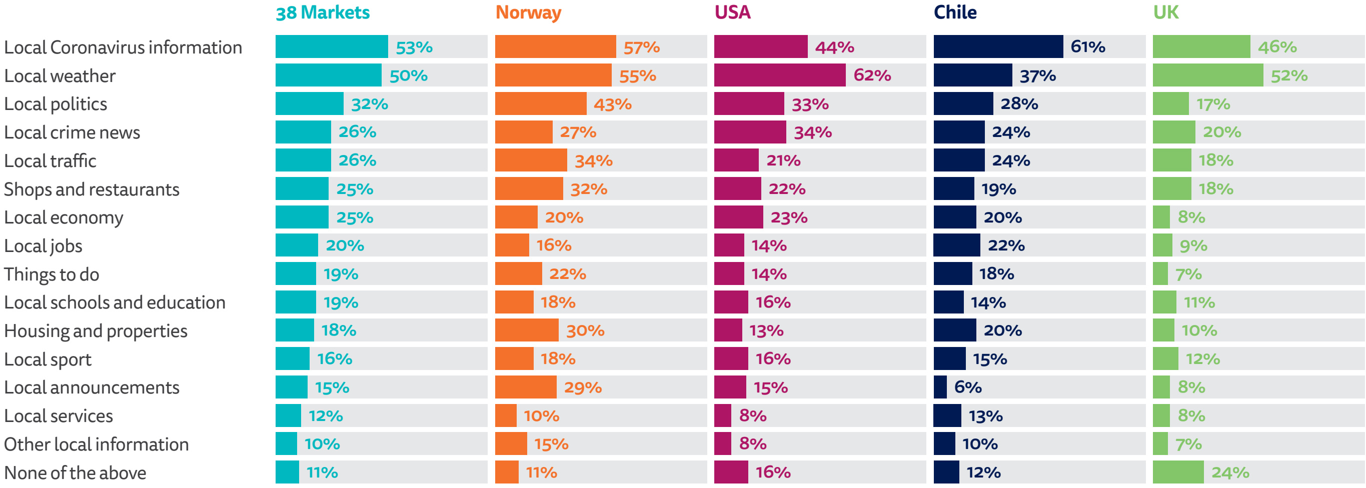
One important function of local and regional journalism is to hold local and regional politicians to account. But local journalism can offer much more: providing stories that help build community, featuring local people who participate in local sports, weddings, or anniversaries, or service information such as weather forecasts, traffic updates, or shop opening hours. And of course, covering the local consequences of the Coronavirus pandemic has been added to this list of tasks in the past year.

But what information about the area they live in do people actually care about? To find out, we asked respondents which local topics out of a list of 15 they had accessed in the previous week. Across 38 markets where we asked this question, two topics stuck out as most important. Around half said they had sought out local information about Coronavirus or other health news (53%) and just as many said they had accessed local weather forecasts (50%). But, for all other topics, reported access rates are low. Only a third said they had accessed news about local politics (32%), which comes third in the ranking across all markets. For all other topics we asked about, often less than a quarter of our respondents said they had accessed them in the last week. In last year's *Digital News Report*, we found that many say that local news is important to them, but when asked about what types of local information people have actually accessed, the figures are much lower – the difference between abstract interest and practical engagement is striking.

Things look slightly better for local news media in some countries. Among the markets where we find relatively high self-reported access rates across all topics are some of the Nordic countries as well as some Eastern European ones such as Romania and Croatia. Many of the Latin American countries sit somewhere in the middle as does the USA. Countries that tend to access less local news include the UK and Japan, but also Denmark, where between 21% and 24% told us they had not accessed *any* of the topics on the list.

[15] For this reason, we did not ask the local news questions in some of the smaller city states like Hong Kong or Singapore. For operational reasons we also did not ask local news questions this year in Kenya, South Africa, Nigeria, Malaysia, Indonesia, and Thailand.

PROPORTION THAT ACCESSED SELECTED LOCAL TOPICS IN THE LAST WEEK – 38 MARKETS



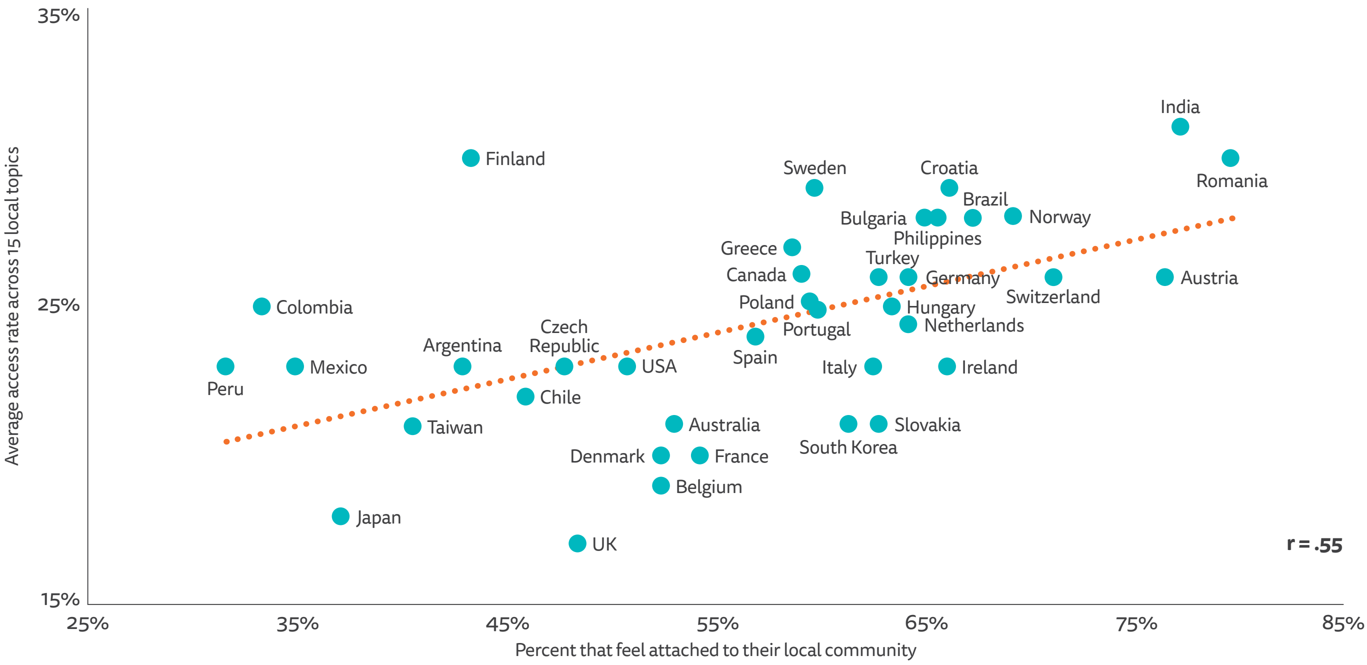
L6_topics_2021. Thinking about local news and information, which of the following topics have you accessed in the last week? *Base: Total sample in each market: 38 markets = 76,731, Norway = 2010, USA = 2001, Chile = 2009, UK = 2039. Note: We did not ask questions on local news in Kenya, South Africa, Nigeria, Singapore, Malaysia, Indonesia, Thailand, and Hong Kong.*

THE ROLE OF COMMUNITY ATTACHMENT

A sense of attachment to one's local community is one factor that previous research has documented is associated with higher local news use (e.g. McLeod et al. 1996). Of course, country differences in local and regional news consumption can have many other causes, ranging from a country's geography, the degree of political centralism in a state, or cultural factors such as the importance of the family and local roots, but at the level of individual markets, research has long documented that higher community involvement is associated with higher local news use. Our data allow us to study this across markets by comparing the average access rate across our 15 local topics in a country with the aggregate local attachment levels.

The next graph shows a clear connection with people in Austria (76%), India (77%), and Romania (80%) – who are on average more attached to their area – being also among those that have accessed most local topics on average. Where attachment is lower, as is the case in Japan (37%) or Peru (32%), people also access fewer local topics on average.

MARKET-LEVEL COMMUNITY ATTACHMENT BY MARKET-LEVEL AVERAGE ACCESS RATE ACROSS 15 LOCAL TOPICS – 38 MARKETS



L6_topics_2021. Thinking about local news and information, which of the following topics have you accessed in the last week? Please select all that apply. **L5_attached_2021.** In general, how attached do you feel to your local community, that is, the people who live in your city district, town, or village? *Base: Total sample in each market (most n ≈ 2000). Note: The proportion who feel attached to their local community are the proportion who say they feel very or somewhat attached to their community in each country.*

Of course, as is always the case with correlations, it is difficult to say if there is one variable that causes the other and, so far, research has been unable to produce evidence for a causal relationship between these two (Hoffman and Eveland 2010). Therefore, we have to consider that, while a well-functioning local news ecology can create community attachment, community attachment can also create demand for local news. And surely, where community attachment is missing to begin with, local and regional media will always have it harder.

LOCAL NEWS EVERYWHERE AND NOWHERE

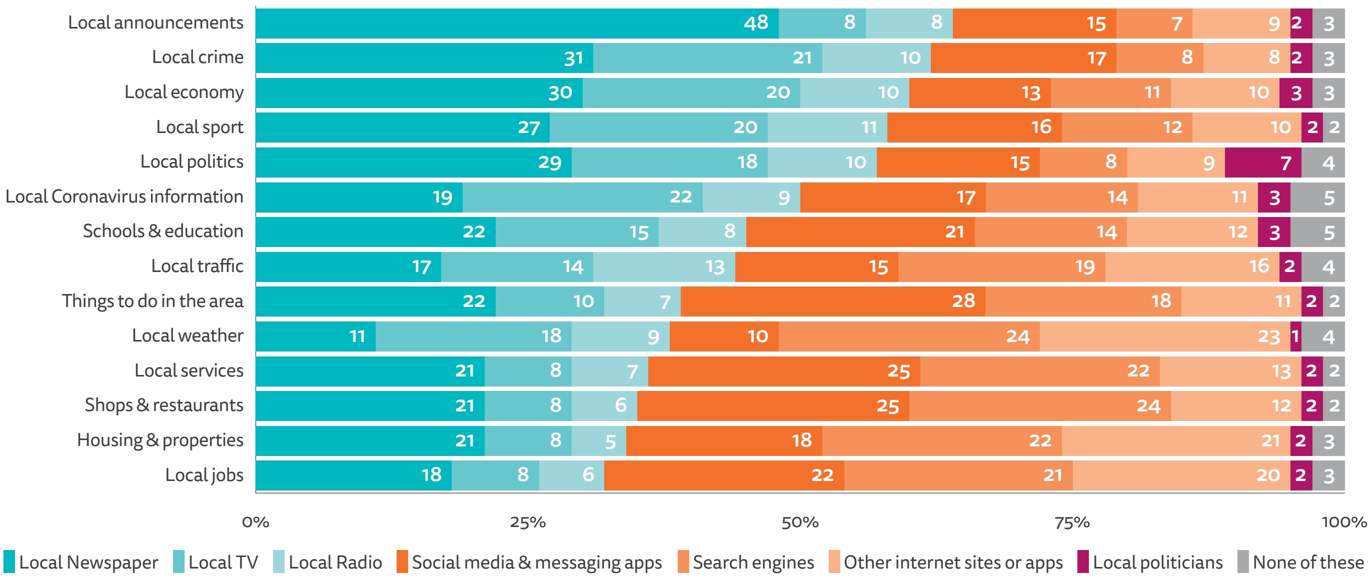
But attachment to local news is only one part of the story. Traditional local and regional media have seen growing competition in the past decade from big platform companies and specialised websites and apps that focus on providing one particular service, like forecasting the weather or finding a job. More recently social media feeds and groups have enabled communities to form around specific subjects and areas. Local authorities, businesses, and politicians also now often provide regular news of their own on local issues using their own websites and social media pages.

In the following chart we can use our data to learn which of these sources people consider the best source of information for each topic. Traditional media – including newspapers, TV, and local radio – are valued most for hard-news topics such as local politics, crime, the economy, or Coronavirus, as well as local sport, with between around 50% and 60% in our sample thinking these offer the best information for them on these topics. Newspapers are also valued as a place for publishing formal announcements such as births and deaths. But for other topics, alternative sources tend to be preferred.

Social media and search take the biggest shares for information about shops and restaurants (49%), local services (47%), or things to do in the area (46%). Of course, some of the time search and social might function as a route back to local news content, but in many cases the information being sought is contained within the platform, making them a destination in their own right. For housing, jobs, or the weather we also see about a fifth of users turning to specialised websites or apps. It is clear that these types of information – integral to the old local print newspaper bundle – have been unbundled.

In the case of Coronavirus news, although local and regional news media are considered best by many, around half say they preferred to get their Coronavirus news from social media, search, and other internet sites and apps that often source official statistics and present data conveniently at a glance.

PROPORTION THAT THINKS EACH IS THE BEST SOURCE OF NEWS FOR DIFFERENT LOCAL TOPICS – 38 MARKETS



L7_sources_2021. You said you have accessed local news and information about the following topic in the last week ... Which sources offers the best information for you on this topic? *Base: Local announcements/Local crime news/Local economy/Local politics/Local sport/Things to do/Local schools/Local services/Shops and restaurants/Housing/Local Coronavirus information/Local jobs/Local traffic/Local weather =11,560/20,219/18,940/24,355/12,555/14,941/14,337/9,025/19,381/13,963/40,316/15,557/19,705/38,404.*

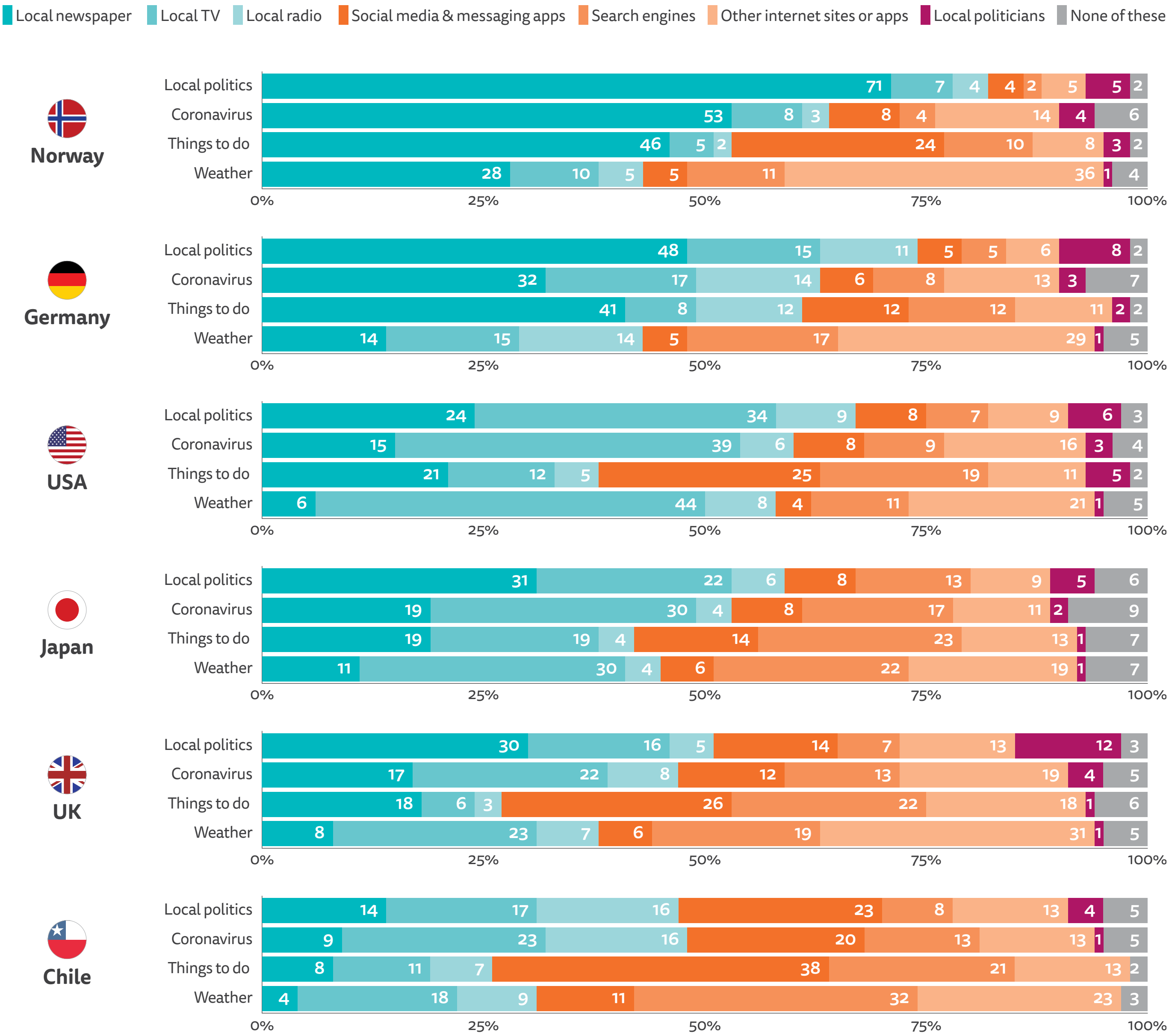
LOCAL MARKET DIFFERENCES

In some of our countries the local newspaper continues to dominate across a wide variety of topics. This is especially visible in Norway and looks similar in Sweden and Finland. (In some cases, local publishers like Schibsted own some of the platforms to find jobs or real estate.) But even here, unbundling is under way with consumers often preferring to find 'things to do' or weather through alternative websites or social media.

Traditional local sources are deemed best across a series of topics in Germany, but our survey data show that respondents find local newspapers somewhat less important in a country where public service broadcasters offer a variety of regional radio and TV channels and where people are more hesitant to turn to social and search more generally.

In the USA we see a slightly different pattern, partly due to the strength of local television, which is seen as the best source for both local politics and Coronavirus information. Strong competition from these free TV outlets may be one reason why local newspapers in the USA have had such a hard time in monetising their business. Highly developed internet sites mean only a fifth (21%) still feel they are best placed to provide information about things to do. In the UK and Chile alternatives to traditional local media are often considered the best source across topics for more than half of our survey respondents. The UK is also among the countries where a significant proportion prefer to get their local politics news directly from politicians (12%).

PROPORTION THAT THINKS EACH IS THE BEST SOURCE OF NEWS FOR DIFFERENT LOCAL TOPICS



L7_sources_2021. You said you have accessed local news and information about the following topic in the last week ... Which sources offers the best information for you on this topic? *Base: Local politics/Things to do/Local Coronavirus information/Local weather: Norway = 865/1144/432/1110, Germany = 783/1183/294/1087, USA = 652/882/282/1231, Japan = 362/1013/277/1042, UK = 353/929/147/1070, Chile = 571/1233/369/749.*

CONCLUSION

In the past, traditional local news media have been used for a wide range of local news and information. Today, as our analysis has shown, they are seen as the best source only for a minority of topics, with people preferring platforms and specialised websites for most others. This 'great unbundling' has further undermined traditional business models, underlining the importance of a much clearer value proposition for local news media who want to stand out from the many alternative sources of information available.

Local news media still come out top when it comes to information about local politics. But we also saw that only a third say they have accessed such information in the past week. So local media have clear strengths, but in a very competitive media environment effective demand may be limited. A sense of attachment to the local community is associated with higher engagement with local news, but even in countries with relatively higher levels of attachment, people have come to rely on traditional local news sources for only a very limited set of topics which will be difficult to monetise on their own.

Longstanding local publishers are moving forward in the face of these challenges, with local newspapers across the world working to develop new editorial products and distinguish value-added journalism from the abundant information available online, from *Ouest-France*'s new Minuit Sport offer to *Westfalenpost*'s Mutmacher (Encouragement) series, featuring stories of local people overcoming difficult circumstances. Digital entrants are also active in local news, from aggregators such as News Break, to single-topic niche networks like Chalkbeat (education) or the Athletic (sports). We have also seen local editorial newsletters emerge, such as those run by Whereby.us, or those launched by Axios in Minneapolis, Denver, Tampa, and Des Moines, or acquired in North Carolina, where the company bought Charlotte Agenda for nearly $5m.

But it is uncertain how far these or similar efforts elsewhere will be able to solve the profound problems around the unbundling of local information that we have mapped with our data. Given the competition from platforms and other digital alternatives, local news media's share of attention, and thus advertising and reader revenues, will be very different from a past in which newspapers in particular dominated local media markets.

2.4 How do People Think about the Financing of the Commercial News Media?

Richard Fletcher, Senior Research Fellow, Reuters Institute for the Study of Journalism and **Rasmus Kleis Nielsen**, Director, Reuters Institute for the Study of Journalism

Conversations about the financing of commercial news media are increasingly focused on the long-term sustainability of the industry. Advertising revenues increasingly go to Google, Facebook, and a few other large digital platforms which have further disrupted a business already challenged by the move to digital, and while some news organisations still generate significant offline and online advertising revenues, the share of advertising that goes to news media is declining. Although parts of the audience are willing to take out paid subscriptions from some outlets, and a few titles are doing very well in terms of reader revenues, most people are not willing to pay, as an abundance of news remains freely accessible from commercial and in some cases public service or non-profit providers. Commercial news media are exploring other sources of revenue too (ecommerce, events, services, etc.), but for many publishers, the business outlook remains challenging, even precarious.

Faced with what looks to many like a classic case of market failure in an industry that can – at least in the best cases – deliver demonstrable societal benefits, government intervention is an option. Indeed, some media markets have had such arrangements for decades, for example, in the form of public service broadcasting or considerable direct and indirect subsidies for newspapers. Others are now looking at alternative ways of using policy to secure additional revenues for commercial news media from the biggest platform companies, such as Google and Facebook, either through competition rules codes (Australia), copyright reform (EU), or potentially earmarking parts of new taxes on digital services for journalism.

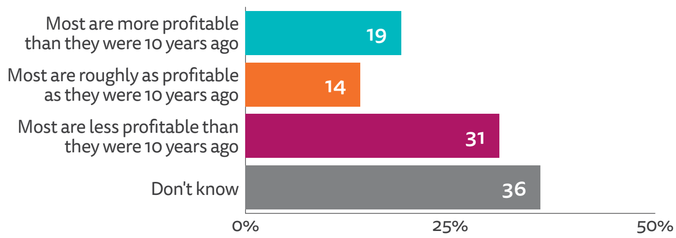
Public opinion is one of the factors that will shape governments' appetite for intervention and their priorities. So what does the public think about financing of the commercial news media?

In this chapter, we present data on how concerned people are about the financial situation commercial news organisations currently find themselves in, whether people think they are making more money or less money than in the past, and whether they think their respective governments should step in to help those outlets that are struggling.[16]

The first and perhaps most important point is that commercial media financing is not a particularly salient issue for many people. This means that a substantial minority say they 'don't know' when asked questions about it. This is a useful reminder that, although media financing is undoubtedly an important issue for society, and those connected to the media industry often feel very passionately about it, it is not something that the public spends a lot of time worrying about. This, of course, has consequences for the extent to which proposals and reforms can gather public support, and will perhaps influence the extent to which politicians will see the issue as a priority.

The relatively low salience of this issue is evident in what appears to be a lack of public awareness of the financial challenges faced by the commercial news media. Although the picture is sometimes mixed and comprehensive global data are hard to come by, WAN-IFRA recently reported that the combined total revenue for daily publications has shrunk by around 20% since 2015. Although there are notable exceptions that have bucked this trend, it seems that since 2010 the overall trajectory is downwards – particularly for newspapers, and especially for local titles and titles serving poor communities.

PROPORTION THAT THINKS COMMERCIAL NEWS MEDIA HAVE BECOME MORE PROFITABLE IN THE LAST DECADE – 33 MARKETS



Financing2_2021. To the best of your knowledge, which of the following best describes the financial state of commercial news organisations in your country? *Base: Total sample in 33 markets: 66,120.*

[16] We did not ask questions on commercial news media financing in Malaysia, Brazil, Argentina, Chile, Mexico, South Africa, Kenya, Philippines, Colombia, Indonesia, Nigeria, Peru, or Thailand.

Across all 33 markets where we fielded this question, around one-third (31%) think that most news organisations are less profitable than they were ten years ago. If we split the data by market we do see some variation, but the differences are small – in every market less than half think that most news organisations are less profitable. Perhaps more striking still is that one-fifth (19%) of respondents believe that most commercial news outlets are more profitable now than they were a decade ago. It is also worth noting that 36% say they don't know, highlighting again that the finances of commercial media are not front of mind for many people outside of the industry.

PROPORTION CONCERNED ABOUT THE FINANCIAL STATE OF NEWS ORGANISATIONS – SELECTED MARKETS

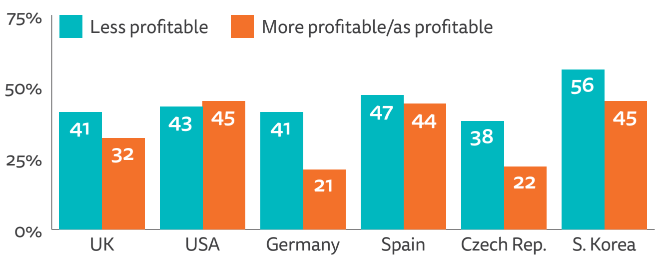
North America	Concerned	Don't Know	Not Concerned
USA	32%	21%	47%
Canada	34%	18%	49%
Northern Europe	**Concerned**	**Don't Know**	**Not Concerned**
Denmark	19%	24%	57%
Finland	20%	22%	58%
Norway	20%	17%	62%
Sweden	26%	21%	54%
UK	26%	23%	51%
Ireland	37%	12%	51%
Western Europe	**Concerned**	**Don't Know**	**Not Concerned**
Austria	21%	21%	58%
Germany	23%	28%	49%
France	29%	16%	54%
Switzerland	30%	15%	54%
Belgium	33%	17%	51%
Netherlands	42%	17%	41%
Southern Europe	**Concerned**	**Don't Know**	**Not Concerned**
Croatia	15%	9%	75%
Greece	32%	10%	59%
Turkey	32%	16%	52%
Spain	37%	13%	50%
Italy	39%	15%	47%
Portugal	49%	8%	44%
Eastern Europe	**Concerned**	**Don't Know**	**Not Concerned**
Bulgaria	14%	10%	75%
Czech Republic	21%	24%	55%
Slovakia	22%	7%	71%
Hungary	27%	12%	61%
Romania	28%	10%	62%
Poland	37%	20%	43%
Asia-Pacific	**Concerned**	**Don't Know**	**Not Concerned**
Taiwan	27%	19%	54%
Australia	34%	18%	48%
Japan	37%	30%	34%
Hong Kong	40%	9%	51%
South Korea	40%	19%	41%
Singapore	41%	13%	46%
India	52%	11%	37%

Financing1_2021. How concerned are you, if at all, about the financial state of commercial news organisations in your country? *Base: Total sample in each market (most n ≈ 2000).*

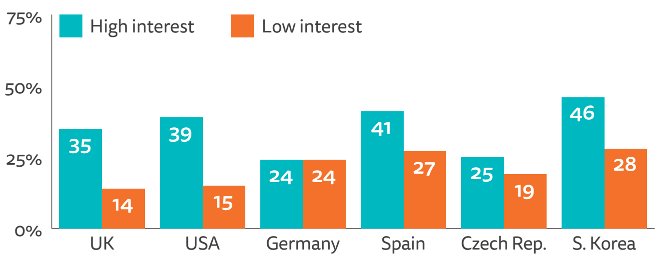
This lack of awareness about the plight of the commercial news media aligns well with data showing low levels of concern over their financial situation. Across all markets, 53% said that they are either 'not at all concerned' or 'not very concerned', with just 31% saying either 'quite concerned' or 'very concerned'. The remaining 17% said 'don't know'. Although there is some national variation, if we break this down by market, we see that the overall picture is quite consistent. In almost all cases the proportion who are concerned is usually smaller than 50%, and most of the time the proportion who are not concerned is larger than the proportion who are concerned. The gap is particularly large in Northern European countries, where relatively high rates of online news payment have given some outlets a strong financial footing, and some of the most widely used news outlets are publicly funded and therefore partially insulated from commercial pressure.

Markets with a larger proportion of people who believe that news organisations are less profitable also tend to have higher levels of concern – with the same true at the individual level. However, there are few differences in levels of concern by demographic variables like age, gender, and education. But concern over the financial state of commercial news organisations is usually higher among those with high levels of interest in the news. If we look at a country from each of the six geographic regions, we see that – with the exception of Germany – those with higher interest in news are more likely to be concerned about the financial situation of commercial news media. In the USA and South Korea those that say they trust most news most of the time are more likely to be concerned, but in general trust in the news is not a particularly good predictor of concern. Perhaps most striking is that, even among those with high levels of interest, it is still only a minority that say they are concerned about the finances of commercial news media.

PROPORTION CONCERNED ABOUT THE FINANCIAL STATE OF COMMERCIAL NEWS ORGANISATIONS BY KNOWLEDGE AND INTEREST – SELECTED MARKETS

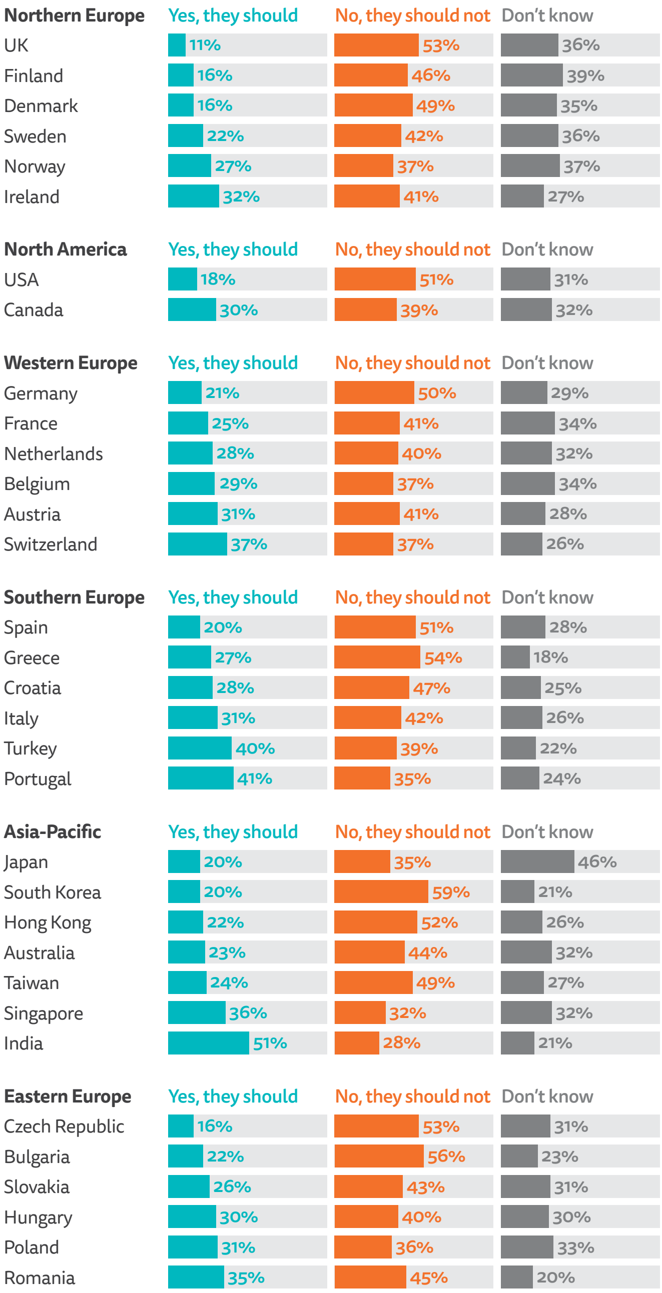


Financing1_2021. How concerned are you, if at all, about the financial state of commercial news organisations in your country? **Financing2_2021.** To the best of your knowledge, which of the following best describes the financial state of commercial news organisations in your country? *Base = Less profitable/More profitable: Czech Republic = 258/923, UK = 702/317, Germany = 585/668, USA = 647/549, Spain = 798/544, South Korea = 649/777.*



Financing1_2021. How concerned are you, if at all, about the financial state of commercial news organisations in your country? **Q1c.** How interested, if at all, would you say you are in news? *Base = High interest/Low interest: Czech Republic = 950/159, UK = 1101/203, Germany = 1365/145, USA = 1130/276, Spain = 1376/148, South Korea = 965/142.*

PROPORTION THAT THINKS THE GOVERNMENT SHOULD STEP IN TO HELP NEWS ORGANISATIONS THAT CAN'T MAKE ENOUGH MONEY ON THEIR OWN – SELECTED MARKETS



Financing3_2021. Should the government step in to help commercial news organisations that can't make enough money on their own? *Base: Total sample in each market (most n ≈ 2000).*

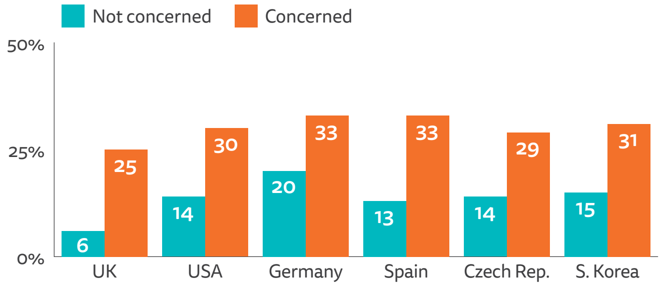
As already noted, some believe that the financial situation of commercial media has reached a point where government intervention is required. Of course, such interventions can take many different forms, each involving different actors and different degrees of change. Furthermore, no two media markets are the same – and because there is a host of different factors that might make state intervention more or less appealing in different circumstances (risk of media capture, pre-existing funding arrangements, trust in the government, to name just three) – there can be no one-size-fits-all approach. However, it can still be useful to measure the public's appetite for government intervention in general terms, first because people may have views on the underlying principle of government intervention in media markets regardless of the specific details, and second because, although proposed solutions do not have to be based on spending public money, most serious and longstanding non-commercial funding arrangements will probably need to be backed up by government legislation in some way to be workable. It should also be noted that asking about specific policies is of little value in cross-national surveys, because no one policy will be relevant in all markets, and because it is difficult to incorporate and communicate the trade-offs inherent to different options.[17]

With that in mind, we asked people whether their government should step in to help commercial news organisations that can't make enough money on their own. Although the reasons behind people's responses will be varied, and it is not possible to know what these are from the data we have, it is clear that public appetite for government intervention is low. Across all 33 markets, just one-quarter (27%) think that the government should step in to help, compared to a 44% that think they should not. Again, if we look at the data market-by-market we do see some national variation, but on the whole the picture is quite consistent. In all but a handful of markets, the proportion opposed to government intervention is larger than the proportion that supports it. Even in stable liberal democracies that already have comparatively generous forms of support available for commercial news media, whether in Denmark (often held up as an example of good practice) or France (where critics argue existing arrangements favour incumbants and print over new entrants and the digital media preferred by younger audiences), those opposed to government intervention outnumber those in favour (by three to one in Denmark, and close to two to one in France).

Those with higher levels of concern about the financial state of commercial news organisations are also more likely to support the idea of government help. In the US, for example, just 14% who are unconcerned about the finances of commercial media would support government intervention, but this figure rises to around one-third (30%) of those with higher levels of concern. Perhaps more of note is that, even among those most concerned about the financial health of commercial news media, most are not convinced that government intervention is the right response.

[17] For example, surveys in the UK that ask people how the BBC should be funded tend to find relatively low support for the licence fee and relatively high support for advertising models – but the respondent is left to assume that quality of output would be the same for both.

PROPORTION THAT THINKS THE GOVERNMENT SHOULD STEP IN TO HELP COMMERCIAL NEWS ORGANISATIONS THAT CAN'T MAKE ENOUGH MONEY ON THEIR OWN BY CONCERN – SELECTED MARKETS



Financing3_2021. Should the government step in to help commercial news organisations that can't make enough money on their own? **Financing1_2021.** How concerned are you, if at all, about the financial state of commercial news organisations in your country? *Base: Not concerned/Concerned: Czech Republic = 1105/426, UK = 464/542, Germany = 996/647, USA = 403/654, Spain = 1008/758, South Korea = 831/826.*

Although the idea of governments stepping in to help commercial media is not a new one, with press subsidies a longstanding feature of some media markets, and a notion increasingly discussed in industry circles, our data suggest it is not an idea that currently enjoys huge public support. We find that most people do not have a basic understanding of the current financial trends in the industry, and only a minority support government intervention. Even those who *are* aware of these difficulties are not particularly concerned about them. And even among those who are most worried, there is little support for government intervention as the solution.

Of course, these debates are playing out at a time when trust in the news media is generally low, where some news publishers are very polarising and unpopular with much of the public, and amid real concerns about media capture – sometimes in countries where this has not been a pressing problem in the recent past. Established forms of government intervention (whether public service or direct support for commercial news media) will probably be read in light of these concerns. Perhaps newer, alternative approaches will too, as long as they involve the government as a key actor.

2.5 How and Why do Consumers Access News on Social Media?

Simge Andı
Postdoctoral Research Fellow
Reuters Institute for the Study of Journalism

Social media have played an important role in how many people access the news over the past decade. The networks people use and the way in which social networks showcase news have, however, changed considerably during that time, as existing platforms such as Facebook, Twitter, and YouTube evolved both in terms of how they work and who uses them, and newer networks such as Instagram, Snapchat, and TikTok have grown in importance.

In this chapter, we aim to cast light on the ever-changing news environment on social media by setting out the differences between networks and what social media news users say their motivation is for accessing news on these platforms, and who they say they pay the most attention to. Our analysis relies on both our survey and data from our focus groups, and concentrates on the six largest open social networks measured in terms of weekly use across all 46 markets: Facebook, YouTube, Twitter, Instagram, Snapchat, and TikTok. Of these, we pay particular attention to newer platforms with a younger user base – Instagram, TikTok, and Snapchat – as much less is known about news usage on these networks.

As is clear from the next table, while well over half of Facebook and Twitter users say they have come across news on these platforms in the past week, for other social media, less than half of users say they have come across news on the platform (and much of this is incidental, the result of seeing news while on a platform for other purposes). In the rest of this chapter, we focus on social media news users specifically, but it is important to keep in mind that this is a subset of all users, and on four of the six platforms we focus on, a minority of regular users.

PROFILE OF USERS ON EACH SOCIAL NETWORK – ALL MARKETS

	Weekly use	Weekly news use	Age distribution
Facebook Launched 2004	69%	44%	Skews slightly older
YouTube Launched 2005	69%	29%	Equally split across ages
Twitter Launched 2006	24%	13%	Skews younger
Instagram Launched 2010	42%	15%	Mostly under 45
TikTok Launched 2016	15%	4%	Mostly under 25
Snapchat Launched 2011	11%	2%	Mostly under 30

Q12A. Which, if any, of the following have you used for any purpose in the last week? Please select all that apply. **Q12B.** Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply. *Base: Total sample in all markets: 92,372.*

MOTIVATIONS FOR NEWS USAGE ON SOCIAL NETWORKS

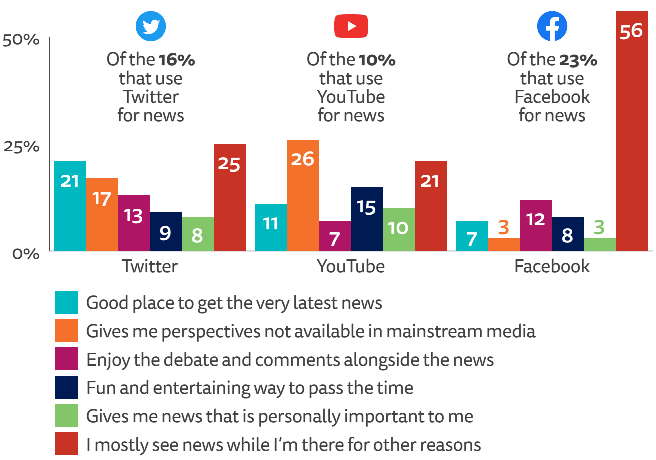
In previous reports, we have shown how social networks operate in different ways and address diverse audiences. This year, we also asked social media news users why they use these networks for news. Those who say they not only use a particular platform, but also have used it in the last week to find, read, watch, share, or discuss news, were presented with six options and could pick one that represented their main motivation.[18] These options can by no means capture every choice available on social networks, but reflect some of the most common motivations.

As we wrote in the Executive Summary and see in previous research, while Facebook is far more widely named as a network where people come across news, our data show it is typically not a platform where news consumers intentionally go to access the news (as others have found too, e.g. Boczkowski et al. 2018). Across countries, many of those who use the platform for news say they pick up information incidentally. Twitter, in contrast, is often seen much more as a primary destination for news, while YouTube and other networks such as Instagram, Snapchat, and TikTok are valued more for entertainment and fun – as well as for some news.

The UK is a good example of how these factors play out across the three largest networks. It is important to keep in mind that the figures in the next chart describe the percentage of *news users* on that network that say each is their main motivation for using it for news.

Although 21% of people who use Twitter for news say they do so because it's 'a good place to access the latest news', the fact that only a small minority actually use Twitter for news in the first place means this equates to just 3% of the UK population. In contrast to Twitter, where news looms large among many users, YouTube is a platform where some find alternative perspectives (26% of YouTube news users), while others use it as a fun and entertaining place (15%). Social media news users on Facebook in the UK mostly see news while on the platform for other reasons (56%), though debating and commenting is often part of the news experience.

PROPORTION OF NEWS USERS ON EACH NETWORK SAYING THIS IS THEIR MAIN MOTIVATION – UK



Q12_Social_motivations. You said that you use <social platform> for news ... What is the MAIN reason that you use <social platform> for news? *Base: Randomly selected Twitter/ Facebook/YouTube news users: 237/404/133.*

These patterns are typical of many other Western countries, including the United States. Though less popular than Facebook overall, Twitter is widely used by journalists and politicians and is where the news gets broken first – attracting others with a strong interest in the news, as is clear from our focus groups.

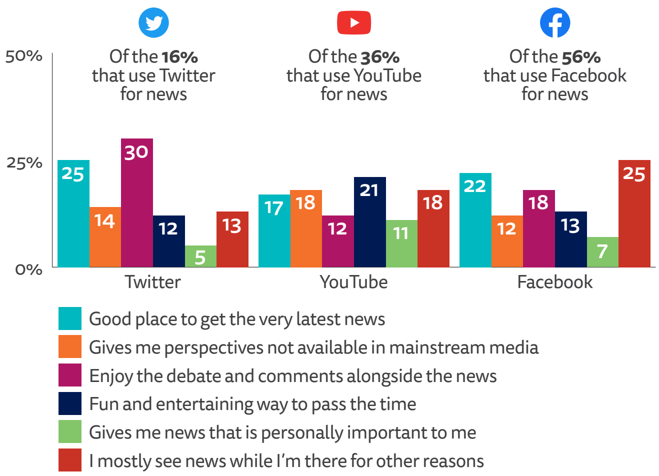
> ***When I'm wondering what is going on in the world ... Twitter [is] definitely like the first place I go to and usually there's like a news story that's breaking and I can read the news and read people's opinions.***
>
> *F, 21, US focus group*

But we see slightly different patterns elsewhere. In much of Latin America and Asia, many more Facebook users say they get news while on the platform, even though much usage remains incidental.

> ***Nowadays where I see news most is on Facebook, because that's when you are ... already seeing photos, things you like.***
>
> *F, 28, Brazil focus group*

In Malaysia, our data show Facebook is more of a news destination (22% of those who use Facebook for news say they get the latest news) and has a smaller proportion of news users who say they mainly see news incidentally than in the UK. Twitter, while being used by a smaller proportion of people overall, is valued most for the latest news and especially for debate.

PROPORTION OF NEWS USERS ON EACH NETWORK SAYING THIS IS THEIR MAIN MOTIVATION – MALAYSIA



Q12_Social_motivations. You said that you use <social platform> for news ... What is the MAIN reason that you use <social platform> for news? *Base: Randomly selected Twitter/ Facebook/YouTube news users: 173/719/381.*

[18] Respondents first answered a question on which social networks they use for news. Then, for one randomly selected social network they answered two questions on motivations for using it for news and news sources they pay attention to.

WHAT SOURCES OF NEWS DO PEOPLE PAY ATTENTION TO ON SOCIAL MEDIA?

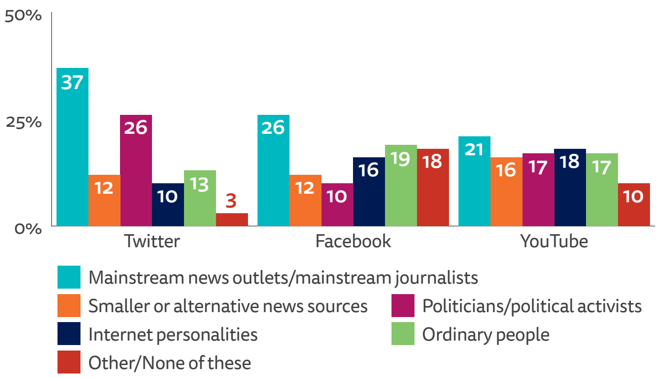
Social media feeds are full of information and opinions shared by ordinary people, advertisers, as well as posts from activist groups, politicians, and news media that a user follows (or the platform recommends). But who do different audience groups pay attention to across networks? Once again, we presented respondents with a range of options and asked them to say where they placed most attention when it came to news.

Taking the United States as an example, we find that, on both Facebook and Twitter, the largest proportion of social media news users say they are most likely to pay attention to mainstream media and journalists. However, many users also appreciate the alternative perspectives that they find there.

> ***I pay attention to articles from sources I trust – NY Times, Washington Post, MSNBC, and my local newspaper. Sometimes I read articles from lesser-known sources because they often go deeper … or present a different slant on the subject.***
>
> *F, 73, US, Facebook user*

Among social media news users, attention on YouTube tends to be evenly split between a range of sources of news and entertainment, including celebrities, politicians, and ordinary people.

WHO PEOPLE PAY MOST ATTENTION TO WHEN USING EACH SOCIAL NETWORK FOR NEWS – USA



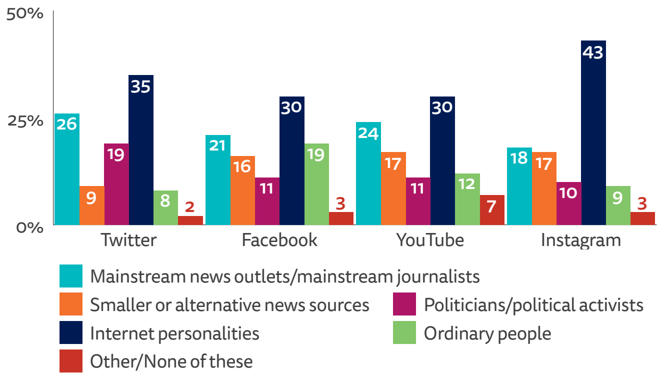
Q12_Social_sources. You said that you use <social platform> for news … When it comes to news on <social platform> which of these do you generally pay most attention to? *Base: Randomly selected Twitter/Facebook/YouTube news users: 167/399/307.*

We see these patterns on news sources across most markets, with many social media news users saying they pay the most attention to mainstream media on both Facebook and Twitter. But even here, news brands and journalists have to compete with a range of voices that can often be more engaging and strident.

For instance, politicians and political activists, who often use social media to bypass mainstream media, receive a significant share of news attention on social networks like Twitter. A quarter (26%) of those who use Twitter for news in the US – where the suspension of former president Donald Trump has initiated a debate about private companies' content moderation practices – say they pay most attention to politicians when looking at news on the network.

Elsewhere, alternative voices play an even bigger role. In India, for example, personalities (such as celebrities and influencers) attract most attention amongst social media news users across all four big networks. Facebook users say they pay as much attention to ordinary people as they do to journalists or news organisations when accessing news. And those using Twitter say they pay almost as much attention to politicians as they do journalists or news organisations.

WHO PEOPLE PAY MOST ATTENTION TO WHEN USING EACH SOCIAL NETWORK FOR NEWS – INDIA



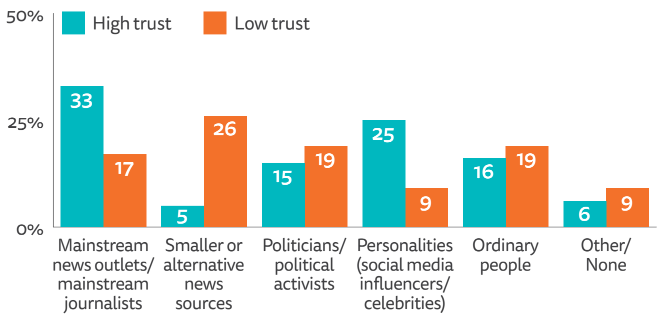
Q12_Social_sources. You said that you use <social platform> for news … When it comes to news on <social platform> which of these do you generally pay most attention to? *Base: Randomly selected Twitter/Facebook/YouTube/Instagram news users: 172/469/619/239.*

Finally, we find that, in general, those who trust the news less are more likely to seek out alternative sources and less likely to say they pay attention to mainstream news outlets. This is particularly the case on YouTube in the United States where many partisan and alternative views have found a home. Those with lower trust are five times more likely to say they pay attention to alternative sources.

> ***I usually see news from Newsmax or OAN [One America Network], I feel like they post information that the mainstream media won't touch on. Like, things that happened at the Capitol, as well as a lot of pro-life news that I don't see on the mainstream media.***
>
> *F, 40, US, YouTube user, self-identifies fairly right-wing*

> ***I like the conspiracy channels and I love Alex Belfield for the way he criticises people.***
>
> *F, 62, US, YouTube user, self-identifies right-wing*

WHO PEOPLE PAY MOST ATTENTION TO WHEN USING YOUTUBE FOR NEWS BY TRUST – USA



Q12_Social_sources. You said that you use YouTube for news … When it comes to news on YouTube which of these do you generally pay most attention to? **Q6_2016_1.** To what extent do you agree with the following statement? I think you can trust most news most of the time. *Base: High/low trust randomly selected YouTube news users: 95/153.*

YOUTH-BASED NETWORKS AND THE ROLE OF INFLUENCERS

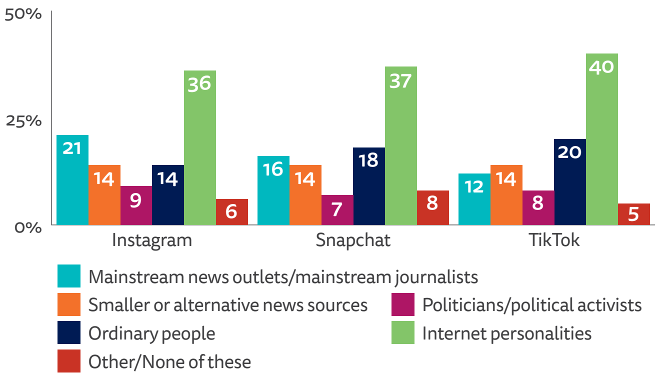
Over the past few years, the *Digital News Report* has documented how younger users have adopted more visually based social networks like Instagram, Snapchat, and now TikTok – often while also using older networks.

Though the key motivation for users of these networks is fun and entertainment, serious news topics such as mental health, climate change, COVID-19, and Black Lives Matter have been widely discussed in the last year.

> ***The benefit is, it is comprehensive, it is all right there and at the same time it is relevant. So, if you are checking out like your friend's stories you can also see the news or entertainment stories.***
>
> *M, 26, US focus group, Snapchat user*

These networks have also been used for political protests in countries like Peru and Indonesia. But when it comes to news, our research shows that many of the conversations are not framed by journalists but rather by 'personalities' or ordinary people.

WHO U35s PAY MOST ATTENTION TO WHEN USING EACH FOR NEWS – ALL MARKETS



Q12_Social_sources. You said that you use <social platform> for news ... When it comes to news on <social platform> which of these do you generally pay most attention to? *Base: U35 randomly selected Instagram/Snapchat/TikTok news users: 3416/597/786*

Who are these 'personalities' that people pay attention to on social media? The definition used in our survey is rather broad, combining celebrities, such as actors and musicians, with social media influencers and reality stars.

Our open-ended responses suggest that much of the news circulating on Instagram, Snapchat, and TikTok is related to subjects like health, fashion, and sexuality as opposed to more 'traditional' topics, such as politics or economics. Influencers often have strong opinions on these topics and frequently criticise the media for their perceived unfair treatment of women or LGBTQ individuals.

> ***The social media influencers and comedians that I follow are extremely opinionated, which is a good thing. Because of the number of people there [on social networks], you get better sources to hear both sides of the story.***
>
> *F, 19, India, Instagram user*

Setting out facts clearly and accurately is not what these networks do. Indeed, in addition to all the other things they do, influencers and celebrities on social media have been found to be among the key distributors of misinformation about vaccines or the link with 5G networks.[19] Could journalists and news organisations play a more prominent role on these networks and provide more credible information? Some media organisations have already ventured into this arena. The *Guardian*, for example, produces the 'Fake or for Real?' segment on Instagram, where a young journalist goes over the week's claims using the platform's quiz feature. Strong opinions or a more comedic approach to news may not come naturally to many journalists steeped in traditions of objectivity and impartiality. Still, several journalists have experimented with a different tone. The *Washington Post*'s 'TikTok guy' Dave Jorgenson, for example, creates regular amusing spoofs linked to the news. These examples focus on creating authentic content for a particular demographic using visual content designed to work on a mobile phone.

The success of these experiments, however, depends on the target audience, the network culture, and the algorithmic features of the social network (and sometimes they do not have any clear, direct form of monetisation). For instance, some networks, such as Snapchat, have a separate space for news. But on Instagram and TikTok, news stories blend in with videos and images that other users share. Given that the algorithms are mainly driven by popularity and relevance, content needs to be highly engaging to reach a wide audience. This is perhaps even more important for newsrooms who are actively using, or are planning to use, TikTok, where users spend the most time 'flopping' through hundreds of videos on the 'For You' page.

[19] Ahmadi, A., Chan, F. 'Online Influencers have Become Powerful Vectors in Promoting False Information and Conspiracy Theories', 8 Dec. 2020. https://firstdraftnews.org/latest/influencers-vectors-misinformation/

CONCLUSION

In this chapter, we have provided evidence of the differences between the main social networks in terms of social media news users' motivations and whom they pay the most attention to. Platform characteristics mostly play out in similar ways across countries, but the political and social context can make a significant difference. For instance, a social network that is incidentally used for news in Western countries might be a key news destination in countries in the Global South.

For every social network other than Facebook and Twitter, it is a minority of users who say they get news while using the platform in question, and even among the social media news users we focus on in this chapter, the centrality of getting the latest news as a motivation varies (and a desire for entertainment as well as incidental exposure looms large). While our data show that mainstream media capture some attention, even around news and among social media news users, other voices play a larger role. This is particularly clear on newer networks, among younger people, and among those with lower levels of trust in news, who often seek out alternative perspectives in social media that they believe mainstream media are ignoring.

Social media are a complex space for mainstream media organisations to navigate. They have to share this space with a range of other content creators who do not have the same editorial principles and values. But given the time that people spend on social networks – and the dangers of false information and political propaganda – it still seems important that journalists and news organisations find ways to adapt to these more informal spaces, especially if they want to engage people with low interest in news and young people (groups that rarely go directly to news sites or apps), and especially if social media can convince publishers that the platform in question delivers a reasonable return on investment.

The tone and the formats that young people and others use, especially on newer networks, does not always come naturally to journalists. But the focus on fun and entertainment does not necessarily mean that young people are unwilling to talk about 'serious' issues on these platforms. On the contrary, from climate change to Black Lives Matter, many young people use their creativity to raise awareness about the issues that concern them, and celebrities and influencers who mostly focus on entertainment and similar issues sometimes play a key role in these discussions – at best, raising awareness and speaking out on important issues, at worst, spreading false or misleading information.

News organisations have started to recognise the importance of engaging in these spaces. In some cases, these efforts involve adapting existing content using new formats, but in others it may require an entirely new approach involving bespoke content, a diverse agenda and more editorial freedom assigned to younger journalists. The continued growth of the youth-orientated networks makes this work more vital than ever, even as the business side is rarely clear.

SECTION 3

Analysis by Country and Market

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

These include an overview of consumption in each market, including details of the most popular news brands – traditional and online. The pages also contain statistics about the use of devices such as smartphones and tablets and the role of different social networks for news. Information is drawn from the 2021 Digital News Report survey using the methodology outlined on p.6, with the exception of population and internet levels which are drawn from the latest version of Internet World Statistics.

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

In some other markets, where internet penetration is lower, our data often represent younger and more affluent groups – even if it meets other nationally representative quotas. For all these reasons, one should be cautious in comparing some data points across markets where we know these limitations apply (see methodology on p.6). In a few markets we do not show certain data points (such as paying for news) because we feel these could lead to misunderstandings or misleading comparisons. We have also signalled specific details about samples in a short note on the relevant page and also include the internet penetration rate on each.

In the Netherlands we conducted a repoll of brand reach numbers in late March 2021 due to a scripting error in the original poll. All other numbers are taken from the January/February poll. Due to a scripting error there are no 'Sources of News' data for 2014 in any market.

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.

SECTION 3

Analysis by Country and Market
Europe

EUROPE

UNITED KINGDOM

STATISTICS

Population	**67m**
Internet penetration	**95%**

The UK was particularly badly affected by COVID-19, with a high death rate and strict lockdowns, before a successful vaccination roll-out. The crisis has increased consumption of news overall, but has also led to layoffs and closures in an already fragile media eco-system. Meanwhile Brexit fallout continues to fuel divisions, threatening the future of the United Kingdom itself.

A series of lockdowns has increased the importance of television news over the last year with BBC, ITV, and Sky News all increasing weekly reach. By contrast print newspapers, which are still mainly distributed via newsstands in the UK, have been in freefall, with local and national papers down by an average of 10% each and freesheets down by 40%, according to industry data. In spite of a three-month government public health advertising campaign designed in part to help the press, more than 2,000 staff across the UK's national and regional press temporarily or permanently lost their jobs as a result of the Coronavirus outbreak, according to research from *Press Gazette*. Digital-born operators have also been affected, with HuffPost losing half of its London-based staff, following the acquisition by BuzzFeed. The UK's largest regional news group, Reach plc, is cutting costs partly by closing offices. It says three-quarters of staff will permanently work from home in the future.[20]

Elsewhere the crisis has accelerated registration and digital subscription strategies. Both the *Telegraph* and *The Times* now have around 400,000 digital subscribers while the *Guardian* says 900,000 are regularly paying for its online journalism via a combination of subscription to their apps and recurring donations, though the website remains free to access. The government's move to scrap VAT for digital publications has benefited the industry by about £50m a year.[21] Despite some subscription growth, only a small minority of our survey respondents (8%) currently pay for any online news, with free news content widely available.

Publishers are hoping the government may be able to help squeeze more money out of platforms. Facebook rolled out its news service in the UK in January, which involves substantial payments to leading publishers, and Google is also licensing news content – but the sums involved remain modest compared with deals done in Australia. Some expect the creation of a new Digital Markets Unit to regulate digital platforms based within the Competition Commission may encourage more and better deals, while the communications regulator Ofcom will be in charge of regulating various online harms.

Overall trust in the media is up eight percentage points to 36%, but it should be noted that this is still 14 points lower than before the Brexit referendum in 2016, with the media and social media often blamed for fostering divisions. Our own research shows how trust in particular brands often splits along both political and/or generational lines. We also find that political partisans from both sides feel that UK media coverage has been unfair to them (see section 2.1 on fairness for more).

Government attitudes to the BBC had softened during the crisis with ministers returning to studios after earlier boycotts and plans to cut the BBC down to size or decriminalise the licence fee put on hold. However, a scandal over the methods used by a rogue journalist, Martin Bashir, in obtaining an interview with Princess Diana 25 years ago, has reignited criticism about editorial oversight and emboldened the BBC's many critics. Incoming Director General Tim Davie has embarked on his own radical reforms to make the corporation more relevant and to address critiques about it being too London-centred. Jobs have been cut – including almost 500 in news – and key departments are to be moved out of the capital.

Davie has also restated the importance of impartiality in the light of increased polarisation, culture wars, and the growing popularity of opinion-led TV broadcasters. More opinion and political debate could be on the way with the launch of GB News, a channel which says it wants to counter the liberal and 'metropolitan bias' of existing broadcast outlets. Amid fears that the UK is set to embark on an era of US-style partisan TV, GB News has insisted that it will not be 'shouty, angry television', and will conform to existing impartiality rules.[22]

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

[20] https://www.ft.com/content/a3a59984-8ed0-4d11-a180-cd289aab8856
[21] https://www.pressgazette.co.uk/news-industry-set-for-50m-a-year-boost-from-vat-cut-on-digital-publications/
[22] https://inews.co.uk/news/uk/gb-news-launch-date-latest-on-when-andrew-neils-channel-will-start-after-website-goes-live-for-sign-up-947550

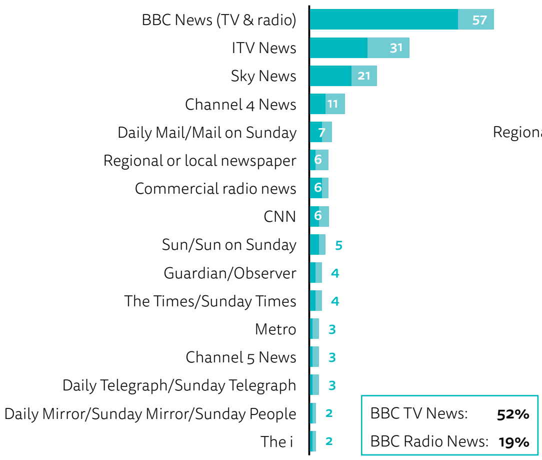
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

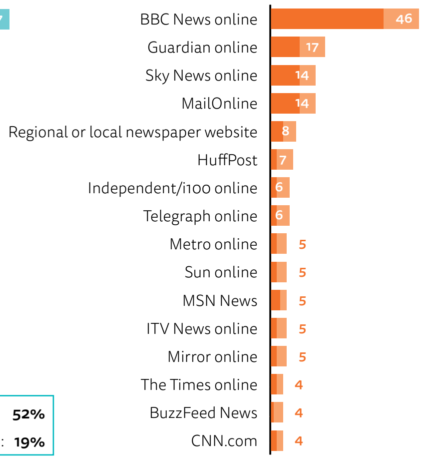
% Weekly usage

- **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



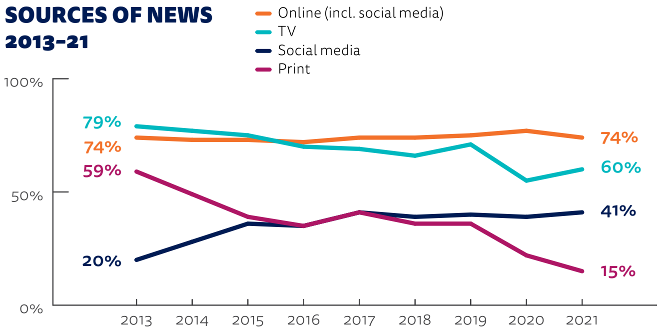
CHANGING MEDIA

A COVID bump for TV news masks historic declines in audiences – especially amongst younger viewers. Social media have become an ever more important source of news, fuelled by widespread smartphone access (68%) which has doubled in the last nine years.

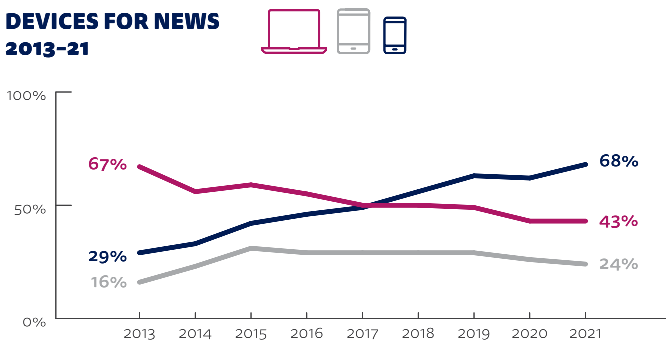
8% pay for **ONLINE NEWS**

22% listen to **PODCASTS** in the last month

SOURCES OF NEWS 2013–21



DEVICES FOR NEWS 2013–21



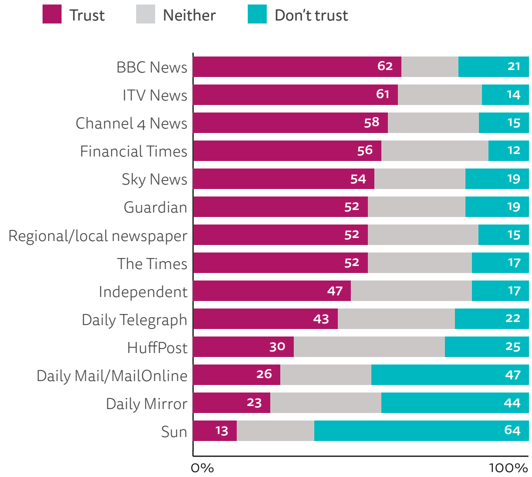
TRUST

Broadcasters such as the BBC, ITV, Sky News, and Channel 4, that are required to meet strict impartiality standards, remain the most trusted news brands, followed by national broadsheet titles. Popular outlets such as the *Sun* and the *Mail* attract big audiences online but are strongly distrusted – especially by the young and by those on the political left.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
36% (+8) =33/46	**44%**
News in search	*News in social*
15%	**6%**

BRAND TRUST SCORES



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

22% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	23%	(-1)	65%
2	Twitter	16%	(+2)	31%
3	WhatsApp	14%	(+7)	66%
4	YouTube	10%	(+3)	59%
5	Facebook Messenger	7%	(+2)	48%
6	Instagram	5%	(+2)	34%

AUSTRIA

STATISTICS

Population	9m
Internet penetration	88%

News consumption and trust increased compared with last year, with Austrians often sceptical of the government's handling of the pandemic. Meanwhile, important regulatory changes have affected digital communications, including a tax on digital advertising and measures aimed at stopping online hate speech.

News consumption increased in 2020, mainly driven by the COVID-19 pandemic, the biggest crisis of the last 15 years. But another major news event shook the nation in November 2020 with Austria's first 'Islamic state'-inspired terrorist attack in central Vienna, with millions following live on TV and online. The attack was by a lone 20-year-old Austrian man who succeeded in killing four people and injuring over 20 others before he was killed by police.

The online sites of tabloids oe24.tv and krone.at were widely criticised for publishing user-generated videos including images of the victims. This raised issues not just about online ethics but rekindled controversies over whether tabloids had been unduly favoured over quality titles in the distribution of COVID financial support from the government. Similarly, increases in advertising spend by the chancellor's office and the government came under scrutiny. Critics have long seen this discretionary measure as a political tool used to reward uncritical media titles.

As in some other European countries, broadcast audiences grew as they played a key role in informing citizens about the pandemic – while communications from the federal government often appeared confused, with sometimes conflicting guidelines from different departments. The public broadcaster ORF adapted rapidly to the needs of COVID-19 in the early stages, with journalists living and working in isolation for periods of two weeks, in specially created studios in Vienna and in the regions, to guarantee reporting during the crisis. ORF remains the most used source both in broadcast and online and is still the most trusted source of information (74% overall). Respondents who self-identify on the right continue to have lower levels of trust in ORF compared with those who self-identify on the left. But the gap narrowed slightly in the last year with both groups still showing relatively high trust levels (64% and 85% respectively).

Among commercial broadcasters, ServusTV, owned by the Red Bull corporation, saw the greatest increase in audience and trust. Like other outlets, they were critical of the government response, but also gave space to alternative views, for example, questioning the use of masks or lockdowns.

Radical plans to reform ORF were stopped with the formation of a new government in 2020. The Austrian Freedom Party (FPÖ), which had been the driving force behind many public attacks on ORF and the most radical proposals for reform, are now in opposition. The year 2021 will, however, be a critical one for the ORF, with elections due for Director General. The incumbent Alexander Wrabetz is standing for what would be an unprecedented fourth term. Chancellor Kurz of the Austrian's People Party (ÖVP) controls media policy and is likely to be closely involved in all decisions about the ORF's future.

The FPÖ has continued its criticisms of media companies while in opposition. YouTube's removal of a video from one of its channels, on the grounds of promoting medical misinformation, proved contentious since it was of a parliamentary speech given by Herbert Kickl, one of FPÖ's leading figures. The Freedom Party considered this as censorship and an unacceptable intrusion into Austrian politics. This also stirred up controversy over the law against hate on the internet (*Gesetz gegen Hass im Netz*), only passed in late 2020, on the grounds that it would give digital platforms an incentive to arbitrarily delete more content.[23]

Facebook has expanded its fact-checking programme to include content produced in Austria. The German Press Agency DPA is responsible for the fact-checking operations, although it will be initially supported by the fact-checking team of the Austrian Press Agency APA.

The long-term decline in newspaper sales accelerated, with the main brands losing an average of 4% circulation. Many, however, including nationals *Der Standard*, *Die Presse*, *Kurier*, and regional titles *Kleine Zeitung*, *OÖNachrichten*, and *Tiroler Tageszeitung*, saw increases of over 25% in digital subscriptions. And apparently the take-up is particularly high among users aged 35–44.[24]

News brands *Der Standard*, *Kronen Zeitung*, and *Kurier* jointly launched the online advertising platform NAPA (Net Austrian Programmatic Alliance). NAPA hopes to attract more participants and become a credible alternative to Google and Facebook. Meanwhile, the 5% digital advertising tax targeted at the platforms introduced in January 2020 had already by July 2020 exceeded the €20m revenue forecast for its first year.

Sergio Sparviero and **Josef Trappel**
University of Salzburg in collaboration with
Stefan Gadringer and **Roland Holzinger**

[23] https://www.derstandard.at/story/2000123293259/zensurakt-youtube-loeschte-kickl-rede-im-parlament-wegen-fake-news
[24] Data from https://www.oeak.at/
[25] https://viecer.univie.ac.at/corona-blog/corona-blog-beitraege/corona-dynamiken22/

WEEKLY REACH OFFLINE AND ONLINE

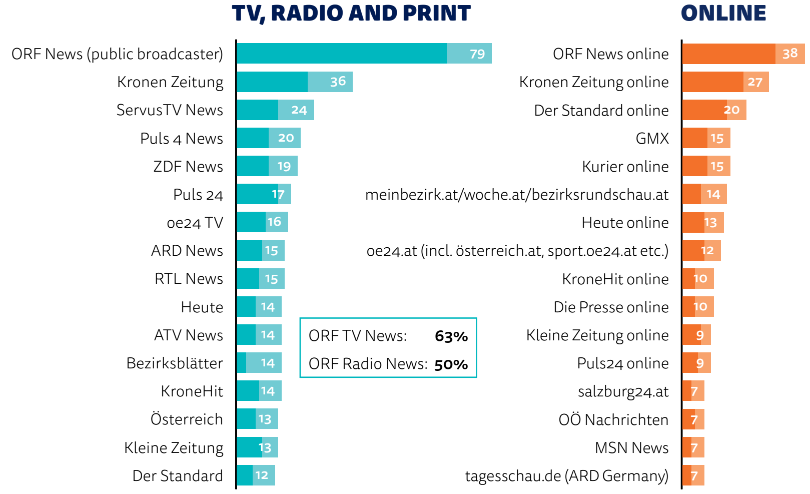
TOP BRANDS
% Weekly usage

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



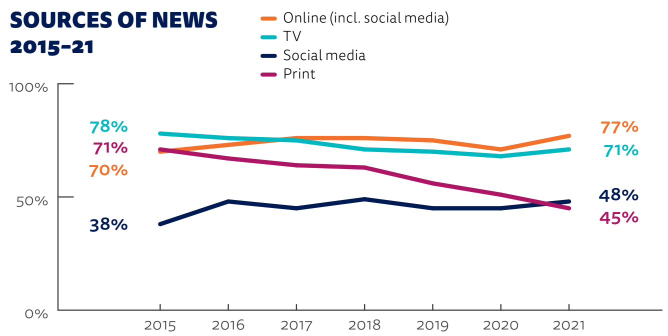
CHANGING MEDIA

Television, online, and social media news use have all increased over the last year driven by COVID-19 and other dramatic news events, while print consumption has continued to fall. Smartphone use for news has grown strongly – up by eight percentage points.

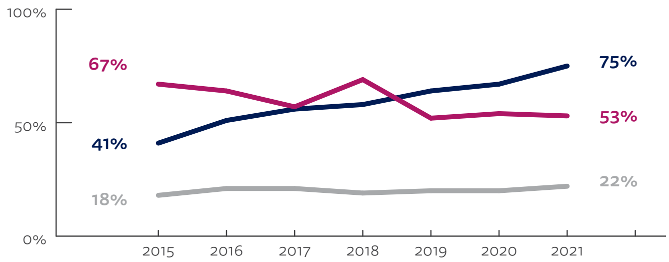
12% PAY
pay for **ONLINE NEWS**

32%
listen to **PODCASTS** in the last month

SOURCES OF NEWS 2015–21



DEVICES FOR NEWS 2015–21*



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

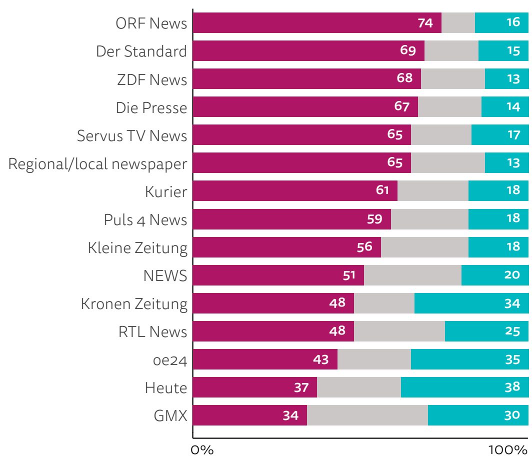
TRUST

Trust in news overall is up by six percentage points and all the main news brands saw increased trust. This is in sharp contrast to trust in the government, which fell soon after the beginning of the pandemic:[25] 27% of our respondents name the government as the main source of false/misleading information about the Coronavirus.

DIFFERENT TYPES OF TRUST

News overall	News I use
46% (+6) 17/46	57%
News in search	**News in social**
26%	18%

BRAND TRUST SCORES



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

27%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	31%	(+1)	60%
2	WhatsApp	22%	(-1)	79%
3	YouTube	21%	(-)	65%
4	Instagram	11%	(+2)	35%
5	Facebook Messenger	5%	(-2)	31%
6	Twitter	5%	(-)	12%

BELGIUM

STATISTICS

Population	**11.6m**
Internet penetration	**94%**

Belgium has two distinct media markets – French-speaking Wallonia and Flemish-speaking Flanders. Given the small size of the markets, publishers continue to see consolidation as a way of securing their digital transition and keeping international companies at bay.

As elsewhere, Belgians flocked to mainstream media during the pandemic, while advertising revenues initially dropped significantly before recovering in the second half of 2020. DPG Media and Mediahuis, Flanders' largest publishers, increased subscriptions across their Flemish and Dutch titles by 2% and 11% respectively, leading to strong annual results.[26] There is a similar picture in Wallonia, with digital subscriptions increasing for most publishers.[27] All this is taking place in a context of major structural changes where, although there are positive signs of an increased willingness to pay and growth in digital subscriptions (up 4% points to 16%), these do not compensate for falling advertising revenues. Estimates suggest that about 40 to 50% of Belgian online advertising flows to Google and Facebook.[28]

The year 2020 saw the consequences of recent mergers play out. At DPG Media, the merger brought Flanders' most popular newspaper/website, *Het Laatste Nieuws*/ hln.be, and commercial TV news provider, VTM Nieuws, under the same roof – literally, in the purpose-built News City building in Antwerp city centre – with a single integrated newsroom for all their news properties. DPG Media also dropped the TV station's own news site vtmnieuws.be and launched the live online video news channel HLN Live in an attempt to position hln.be as the go-to online news site.

In Wallonia, Rossel continued its local consolidation by acquiring the remaining shares of the free daily *Metro* from Mediahuis as well as expanding in Northern France by buying the struggling newspaper *Paris Normandie.* IPM bought *L'Avenir* and the other print activities from Nethys. RTL Group (Luxembourg) bought out the third of its shares held by Audiopresse (a joint venture of Belgian publishers), meaning RTL Belgium is now 100% owned by an international media group. This ended the peculiar Belgian arrangement dating back to 1985, where companies seeking the new commercial TV licences were required to partner with publishers, to reduce their hostility to increased competition for advertising. In both regions, legacy news publishers have now refocused their activities mainly on print and online. As a result, the daily press is dominated by two big players in each region, Mediahuis and DPG Media in Flanders and Rossel and IPM in Wallonia.

The argument seems to be gaining ground that small media markets need a degree of concentration and collaboration to face international competition and digital transition. One concrete example is the 'Flemish Netflix' Streamz, launched in September 2020 as a joint venture between DPG Media and telecom operator Telenet, helped by the Flemish government easing regulatory obstacles and requiring the public broadcaster VRT to offer its drama content on the platform.

In 2020 there was also a new five-year agreement between public broadcaster VRT and the Flemish government. It requires VRT to accelerate its digital transformation but also to restrict its online news to broadcast-based, rather than text-based content. This is in response to lobbying by news publishers concerned that VRT's free news online undermines willingness to pay for commercial digital news. Meanwhile, public subsidy for (profitable) commercial media prompted debate. In Flanders, DPG Media received €996,000 for digital reskilling, while in Wallonia, RTL Belgium nearly received €40 million to cover losses due to the pandemic, but in the end, given the controversy caused and a recovery in the market, did not pursue their request.

The pandemic has brought Belgium's first high-profile case of disinformation, from anti-vaxxers. The issue remains high on the policy agenda, but so far proposals from a 2018 federal expert group for a joint initiative to combat disinformation have come to nothing. However, trust in news overall remains high, especially in Flanders, and the downward trend of recent years has been reversed. Trust in major news brands remains stable, with Flemish news brands even showing a small trust bump. In Flanders VTM (DPG Media) has now overtaken één (VRT) as the most used offline news source, and VTM Nieuws has also surpassed quality newspapers *De Tijd* and *De Standaard* to become the second most trusted news brand after VRT Nieuws. In Wallonia, RTBF's TV news (La Une) has overtaken RTL to become the most used offline source and RTBF News remains the most trusted brand, but RTL is still the leading brand by online weekly use.

Ike Picone
Vrije Universiteit Brussel, Brussels

26 https://www.standaard.be/cnt/dmf20210318_98025429
27 https://www.lesoir.be/308910/article/2020-06-23/les-ventes-dabonnements-aux-journaux-en-forte-hausse-pendant-le-confinement
28 https://www.vlaamseregulatormedia.be/sites/default/files/rapport_mediaconcentratie_2020_zonder_afloop.pdf

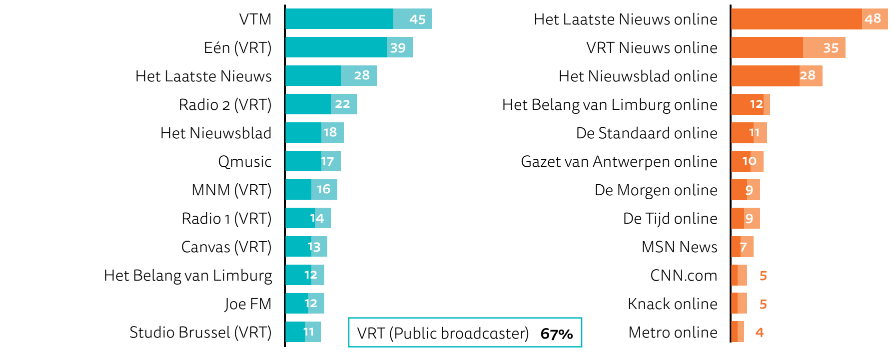
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

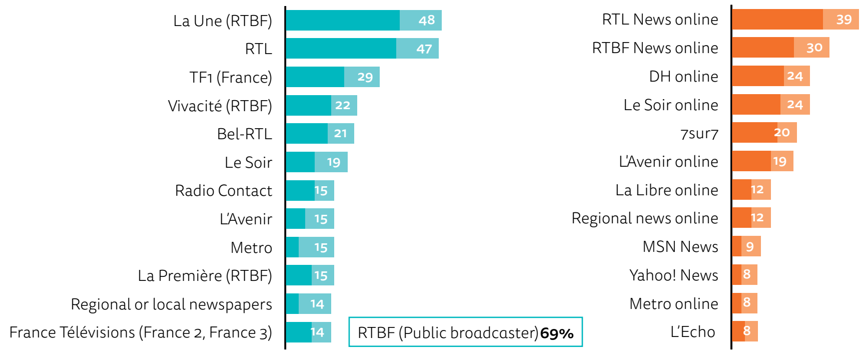
% Weekly usage

- **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 (FLEMISH) / ONLINE (FLEMISH)



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

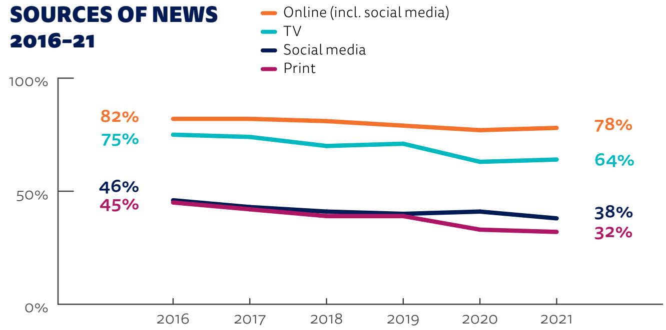


16% pay for **ONLINE NEWS**

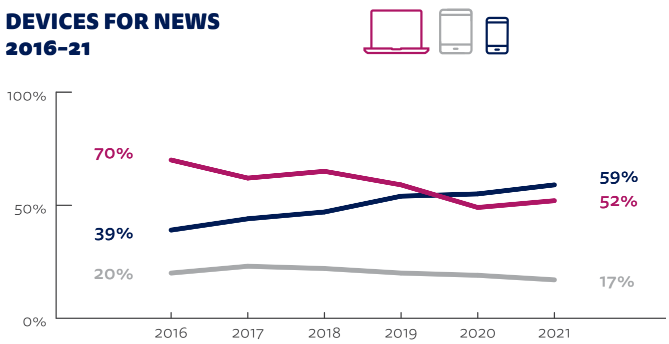
Wallonia 16% | Flanders 16%

26% listen to **PODCASTS** in the last month

SOURCES OF NEWS 2016–21



DEVICES FOR NEWS 2016–21



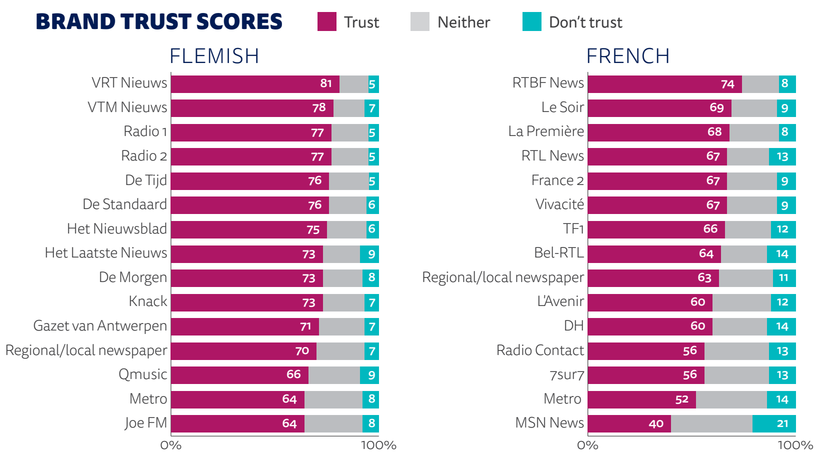
TRUST

Trust in the news is up overall, though it remains considerably higher in Flemish-speaking Flanders (61%) than in French-speaking Wallonia (45%). During the COVID-19 crisis, public broadcasters VRT and RTBF have been a source of reliable information for their respective communities and are also the brands with the highest trust scores.

DIFFERENT TYPES OF TRUST

News overall	News I use	News in search	News in social
54% (+9) =7/46	57%	31%	19%
Wallonia 45%	Wallonia 51%	Wallonia 30%	Wallonia 19%
Flanders 61%	Flanders 62%	Flanders 32%	Flanders 19%

BRAND TRUST SCORES

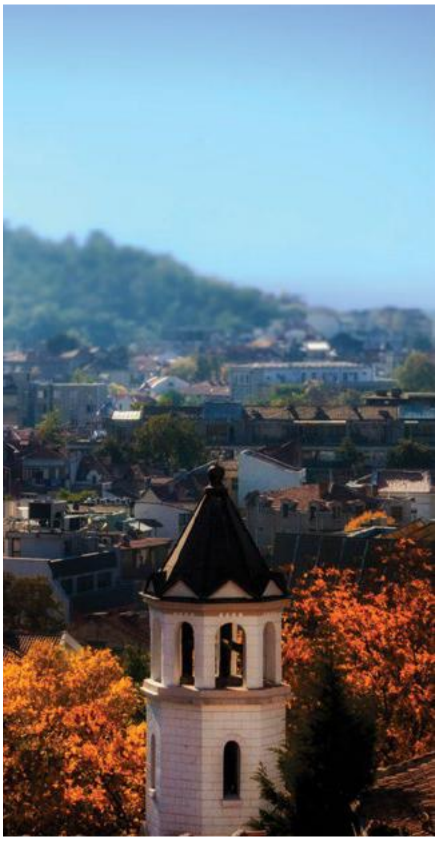


Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news		For All
1	Facebook	39%	(-2)	69%
2	YouTube	18%	(+2)	52%
3	Facebook Messenger	12%	(-)	51%
4	WhatsApp	12%	(+3)	49%
5	Instagram	9%	(+1)	31%
6	Twitter	5%	(-)	13%

BULGARIA



STATISTICS

Population	7.0m
Internet penetration	67%

Bulgaria remains the poorest member of the EU and the one with the lowest ranking in terms of the main indices for press freedom and transparency. Elections in April 2021 led to a setback for the country's long-serving Prime Minister with a falling vote share. But although the political future is uncertain, Bulgaria's media seem to have weathered the COVID-19 pandemic better than some others.

Major brands saw rising audiences during the first lockdown between March and May, and Dnevnik.bg, the first print newspaper to include multimedia within its online site, reported that its web traffic had almost doubled.[29] Whereas the pandemic generally delivered a sustained hit to advertising revenues elsewhere, some Bulgarian media only saw a short-lived fall, with revenues back at 2019 levels by year end. Many structural challenges persisted though, with the top two TV stations, Nova and BTV, taking 69% of TV ad spend. Even so, the vast majority of media groups survived the crisis without closing titles even if they had to impose wage cuts and some layoffs.

Survival came at a price. The financial stability of media companies is sometimes more apparent than real; many rely on bail-outs from owners keen to please the government, influential politicians, or oligarchs, or all three. Government control of public service TV strengthened in the run-up to the April 2021 election and journalists reporting on the summer 2020 wave of anti-government protests were often arrested and beaten. These are some of the features contributing to Bulgaria's low press freedom ranking.[30]

However, 2020 also saw a reversal in the trend that has seen Bulgarian oligarchs buying media outlets for political influence. As domestic oligarchs retreated, well-resourced foreign owners moved in. After two years heading the Nova Broadcasting Group, the pro-government oligarch Kiril Domuschiev sold, apparently for financial reasons, to United Group – a Slovenia-based conglomerate operating across eight countries. This followed United's earlier 2020 purchase, from the oligarch Delian Peevski, of Bulgarian telco, Vivacom, and of Kanal 3 TV and the tabloid newpaper *Telegraf*, all of which had been strongholds for Peevski's party. Nova TV under its new owners is seen as far less pro-government.

Similarly, BTV Media group – which ranks directly after Nova TV in our offline and online brand lists – was bought by Central European Media Enterprises (CME). CME thereby gained 30 TV channels within Bulgaria to add to its operations across five countries. In October 2020 CME was bought by the Czech-based PPF group. It is unclear how these multiple changes might affect the political stance of the BTV stations.

One major development was the creation in November 2019 of 7/8 TV, which became the champion of the summer 2020 anti-government protests. Its founder Stanislav (Slavi) Trifonov, a comedian and talk show host, ran for parliament with his newly established party (There is Such a People) on an anti-corruption platform. They emerged as the second largest party in April's elections and Trifonov and his closest aides became MPs.

TV 7/8 responded to the challenge of relying on advertising in an already crowded TV market by becoming the first channel to offer reasonably priced subscriptions, at under €2 a month for its TV and web content. TV 7/8's success, along with the existing subscribers to the *Capital* weekly magazine and people paying for foreign media, may explain the number of our respondents reporting paying for online news.

After two months of live daily TV broadcasts of COVID-19 themed morning government briefings, the prime minister Boyko Borissov came under unaccustomed scrutiny. Inconvenient questions from some journalists in May 2020 meant thereafter he limited himself to preprepared statements and did no election campaign rallies. After abusing journalists and threatening publishers, Borissov now relies on his own video blog using his Facebook page. He broadcasts from his armoured SUV (known as the Boykomobile), visiting construction sites, making promises to supporters and lauding his successes. He regularly reaches tens of thousands with these Facebook broadcasts.

There are dozens of podcasts and vlogs in Bulgaria. Some focus on interests such as health, music, or indeed politics and economics, while others exploit COVID-19 to spread conspiracy theories. Partisanship and low ethical standards are common, but many reach six-figure audiences and many claim to rely for funding on the crowdfunding and donation platform Patreon.

Stefan Antonov
Business journalist and former Reuters Institute Journalist Fellow

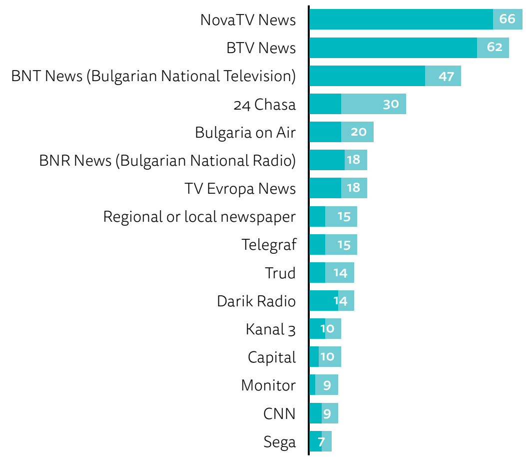
[29] https://www.dnevnik.bg/analizi/2021/02/12/4174052_zatvoreniiat_bar_e_nai-tujnoto_miasto_ili_za/
[30] 112/180 countries according to the 2021 Reporters Without Borders Index.

WEEKLY REACH OFFLINE AND ONLINE

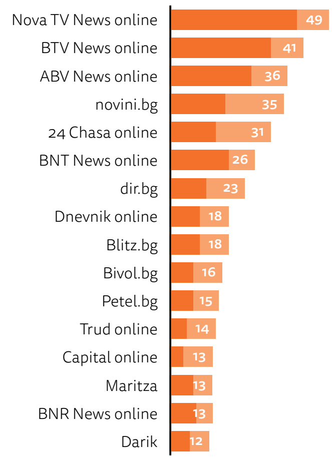
TOP BRANDS
% Weekly usage

- **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

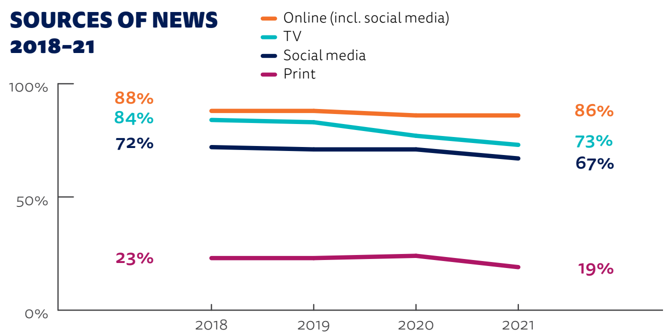


CHANGING MEDIA

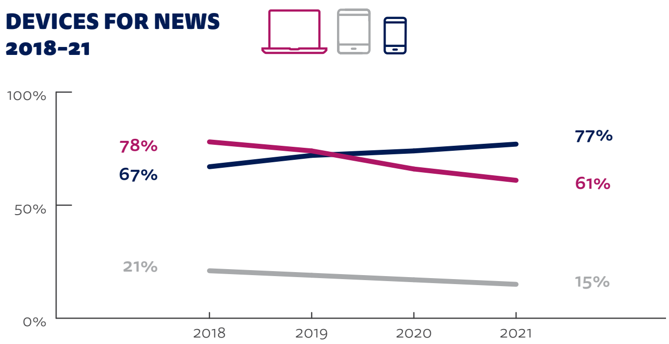
TV and print's decline as sources of news continued, with online's lead unchanged. TV stations and newspapers are offering more content online, where they face competition from multiple websites, bloggers, and politicians all trying to win loyal audiences.

15% pay for **ONLINE NEWS**

SOURCES OF NEWS 2018–21



DEVICES FOR NEWS 2018–21



TRUST

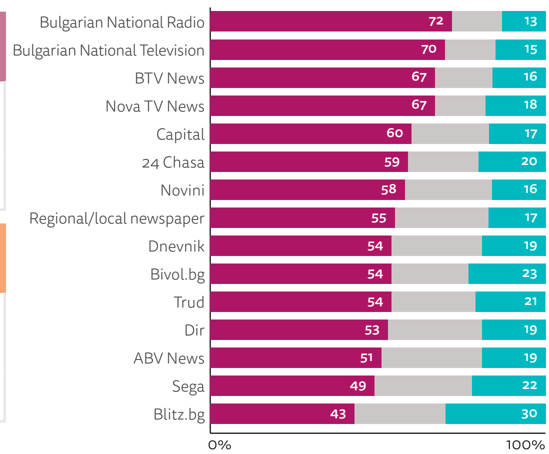
Bulgaria still rates low for trust among our 46 countries, with more people saying they *distrust* rather than trust the news – a product of a deeply polarised media system. Public service radio and TV remain the most trusted brands, with popular brands that often carry more sensationalist material less well trusted.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
32% (-1) =38/46	**37%**
News in search	*News in social*
29%	**25%**

BRAND TRUST SCORES

Trust / Neither / Don't trust



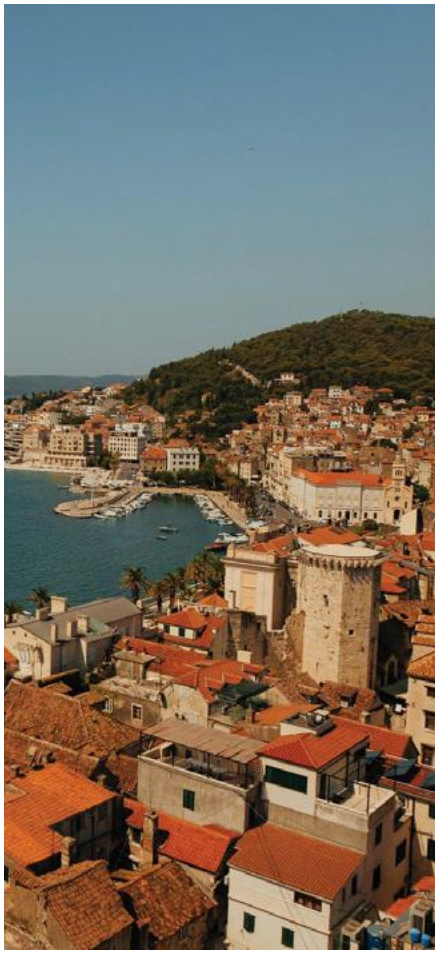
Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

38% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	64%	(-5)	76%
2	YouTube	32%	(-3)	70%
3	Facebook Messenger	17%	(-3)	54%

Rank	Brand	For News		For All
4	Viber	16%	(-1)	61%
5	Instagram	12%	(-)	36%
6	Twitter	8%	(-)	18%



CROATIA

STATISTICS

Population	**4.1m**
Internet penetration	**92%**

COVID-19 has exacerbated the financial pressures on Croatia's legacy media seeking to adapt to the shift of readers and advertising revenues online. Journalists have lost jobs, wages, and come under more political pressure. Meanwhile, current outdated regulatory arrangements risk reducing the range of news channels and pose a threat to pluralism in Croatia.

COVID-19 affected the Croatian media in multiple ways. On the positive side it is probably the main factor explaining the very strong increase in trust in news overall in Croatia (up by 6% points) as people became more reliant on the media during the pandemic. But the negative economic impact was considerable. A survey of electronic media, conducted by the Agency for Electronic Media in January 2021, found that 70% of respondents reported that revenues were down, with TV and radio broadcasters being hardest hit.[31] Among journalists, freelancers were worst affected, nearly 30% had no work during the first months of the pandemic, and two-thirds reported reduced earnings, according to a survey conducted by the Croatian Journalists Association (HND) and the Union of Journalists.[32] While journalists and media companies were covered by the government's COVID-19 business support scheme, freelancers were excluded. And the problems affecting the print sector were evident in the fact that many journalists suffered wage cuts – in some cases wages were halved.[33]

The pandemic increased the structural problems of the media sector in many countries but Croatia was additionally vulnerable given its small market size and the very low level (7%) of numbers of people paying for news online. The need for new digital strategies is urgent, since the pandemic has led to a further decline in the use of print as a news source, down by seven percentage points in the last year, equivalent to the decline in the previous two years. Legacy media finally seem to be waking up to the need to reach audiences online and have launched new subscription campaigns.

COVID-19 also added to the already difficult reporting environment for Croatian journalists. In April 2021 the HND published a report documenting the continued use of lawsuits to silence journalists investigating people in power. They found 924 such cases, primarily against journalists working for Hanza Media and Styria, publishers of the largest dailies *Jutarnji list*, *24 sata*, and *Večernji list*. Commercial television channels RTL, N1 and NOVA TV came under increased pressure by the Prime Minister Andrej Plenković, who accused the media of conspiring against his party's (HDZ) candidates, following local elections in May 2021.

Proposed amendments to the Law on Electronic Media initially attracted attention because of plans to limit hate speech in online comments on news stories. The proposal to hold media organisations responsible for this content has been widely criticised. Some fear that news media would choose to disable online comments if they were held liable for their content.

Another issue around the media law relates to popular cable news channel N1, which many admire for its independent reporting. In spring 2021, the channel was removed from the package provided by an important telecom operator, A1. Because N1 is a cable channel owned by the United Group, operating from the Netherlands, and is not a free-to-air television channel with a national licence, it is not covered by the cable-must-carry rules that apply to stations licensed in Croatia. The risk now is that the country's largest telco, HT, follows suit. If it does, N1's audience would be very hard hit. The channel is hoping the issues will be resolved in a new media law or a national broadcasting licence. If they are not, the potential loss of distribution would pose a real risk to media pluralism and damage the diversity of the Croatian information ecology.

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

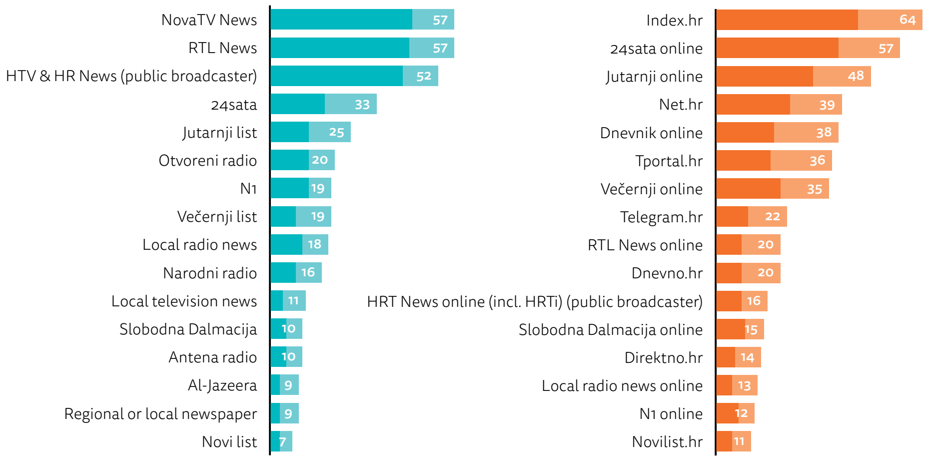
[31] Pandemija uzrokovana virusom COVID-19 negativno utjecala na 78 % elektroničkih medija u Hrvatskoj, https://www.aem.hr/vijesti/pandemija-uzrokovana-virusom-covid-19-negativno-utjecala-na-78-elektronickih-medija-u-hrvatskoj/
[32] Samo 15 posto freelancera u medijima zadržalo poslove od početka zdravstvene krize, https://hnd.hr/samo-15-posto-freelancera-u-medijima-zadrzalo-poslove-od-pocetka-zdravstvene-krize
[33] Kako je Covid-19 kriza utjecala na novinarstvo i medije, https://faktograf.hr/2020/10/15/kako-je-covid-19-kriza-utjecala-na-novinarstvo-i-medije

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

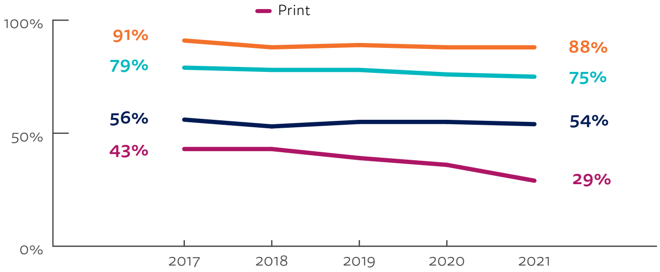


CHANGING MEDIA

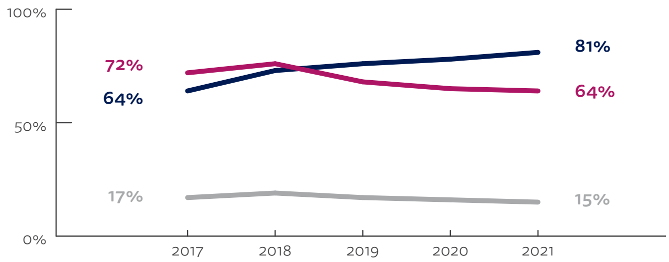
Commercial broadcasters and the public service broadcaster remain the top news sources among legacy media, followed by daily print newspapers, but with some decline. Nova TV is the top offline news source and Index.hr is top online.

7% pay for **ONLINE NEWS**

SOURCES OF NEWS 2017–21



DEVICES FOR NEWS 2017–21



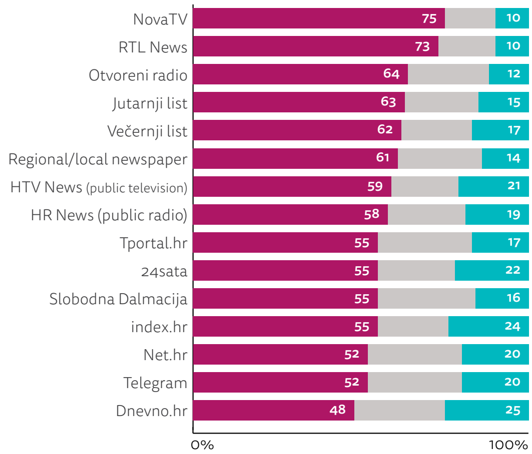
TRUST

Trust in the news has increased overall and for the sources people use themselves. Commercial broadcasters Nova TV and RTL are the two most trusted brands, followed by quality newspapers – with the public broadcasters lower down. Sources associated with the left or right side of the political spectrum (Index.hr and Dnevno.hr, respectively) carry higher levels of *mis*trust than other brands.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
45% (+6) =19/46	**48%**
News in search	*News in social*
34%	**30%**

BRAND TRUST SCORES



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

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

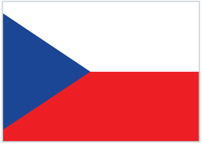
TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	55%	(-)	72%
2	YouTube	26%	(-2)	71%
3	WhatsApp	19%	(+3)	65%
4	Viber	16%	(+2)	60%
5	Facebook Messenger	11%	(-)	48%
6	Instagram	11%	(+1)	40%

CZECH REPUBLIC

STATISTICS

Population	10.6m
Internet penetration	88%



The Czech media market has had to grapple with the negative impact of the pandemic over the course of the last year, with the newspaper sector hardest hit. There were significant moves in the TV market in 2020, notably the change of ownership of the largest commercial TV station Nova, and the launch of CNN Prima News.

The pandemic brought significant challenges to the Czech media market in 2020, particularly in the spring, when advertising expenditures fell dramatically (-21% in May). Overall, the advertising market recorded a small annual rise (3%), driven, however, mostly by the online sector (+13%) and TV (+8%), benefiting from increased consumption during the lockdown, while radio and newspaper advertising revenues experienced substantial declines (-8% and -13%, respectively).[34]

Newspaper sales dropped by 16% on average, more than double the previous year's decline, with the leading tabloid *Blesk* suffering the biggest hit (-20%). The entire print sector reported total revenue losses of 2 billion CZK (€80m), which was not softened by any state support, as the plans for launching a blanket state-sponsored ad campaign or for reducing VAT for publishers did not materialise.[35] Many publishers were thus forced to reduce expenditure, leading to salary cuts, layoffs of personnel, reducing the frequency of publication of some titles, or halting their publication completely. The impact of the pandemic added to the long-term financial problems of one of the legacy publishers, *Mladá Fronta*, which was declared bankrupt at the end of 2020 and sold by auction to an online publisher, Internet Info.

Despite the overall grim situation in the print market, there were some promising trends. A new economic weekly *Hrot* was launched in May (the first new such title for many years), and publisher A11 expanded its portfolio of regional and metropolitan street papers titled *Our Region*. Several titles and publishers reported a marked increase in digital subscriptions, including the youngest Czech daily, *Deník N* (launched in 2018), that had reached 20,000 subscribers by the beginning of 2021, making a major step towards financial sustainability. Publishers have been further increasing the amount of paid online content, encouraged by the steadily growing willingness of readers to pay for it, as confirmed by this year's Digital News Report survey. Some brands have opted for a combination of paywalls with crowdfunding, which in the case of the online video channel DVTV (featuring mainly one-on-one interviews on current affairs) turned into the most successful Czech crowdfunded project ever, raising CZK 9.73m (€375,000) from over 9,000 people.[36]

In the TV market, the biggest development was arguably the May 2020 launch of the 24/7 news channel CNN Prima News. Owned by Prima Group, the second-biggest commercial TV network in the country, the new channel added to the list of international TV stations operating under licence from CNN. Prima's main commercial rival, Nova Group, changed hands in October 2020, following the European Commission's approval of a deal in which Nova's parent company, Central European Media Enterprises (owned by AT&T), was sold to the Czech investment group PPF. Now it has added the largest Central European television company to its substantial telecommunication portfolio, PPF is one of the most powerful multimedia conglomerates in the region. While the company has emphasised the business rationale for the takeover, and the opportunities for synergies between telecommunication and media, concerns have been raised about the potential consequences of such concentration of power, especially in light of PPF's long-term history of veiled but often significant involvement in Czech politics.[37]

Both public service broadcasters have increased their average daily audience share, claimed the number 1 place in TV and radio in 2020, and perform well in our list of offline brands by weekly reach. Online, however, their performance remains far below their success in broadcast. High viewing figures, boosted for Czech Television by the introduction of a new channel ČT3 (aimed at elderly audiences) and of children's educational programme *UčíTelka* (TV Teacher) during the lockdown, have again been complemented by high levels of trust, as seen in the *DNR*'s brand trust scores. At the same time, the ongoing battles for the independence of the Czech Television have further intensified, with a series of politically partisan appointments to the regulator, the Czech Television Council. These changed the balance of power in favour of those that have been accused of seeking to muzzle critical journalism and impose tighter political control over the Czech public service broadcaster.

Václav Štětka
Loughborough University

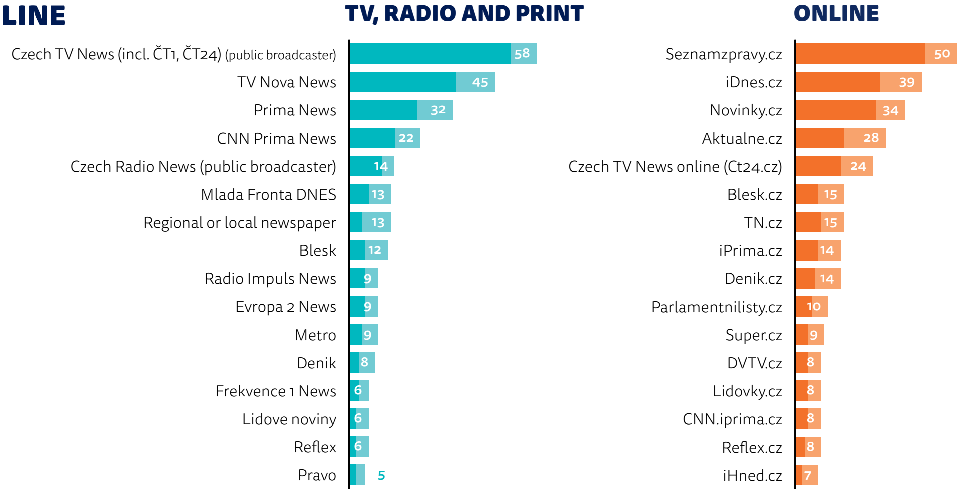
[34] https://www.mediaguru.cz/clanky/2021/03/prehled-ceskeho-medialniho-trhu-v-roce-2020/
[35] https://www.mediaguru.cz/clanky/2021/02/tisk-odhaduje-propad-trzeb-v-roce-2020-na-dve-miliardy/
[36] https://www.lupa.cz/aktuality/online-televize-dvtv-pokorila-rekord-v-crowdfundingu-vybrala-9-7-milionu-kc/
[37] https://visegradinsight.eu/czech-business-empire-with-an-unsavoury-political-tinge/

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

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

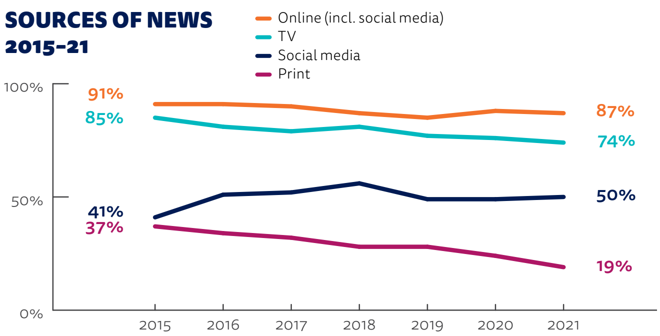


CHANGING MEDIA

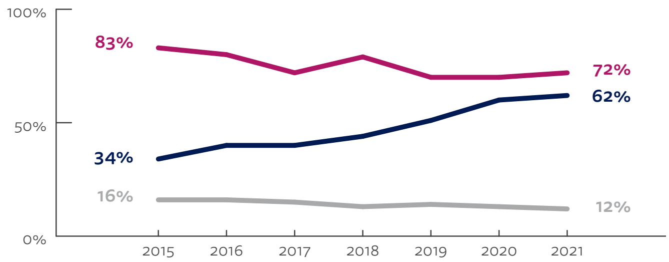
The gap between online media and television as sources of news has continued to widen, while access via print has halved since 2015. With COVID-19 restrictions on movement, the smartphone has increased its importance as a device for accessing news.

13% pay for **ONLINE NEWS**

SOURCES OF NEWS 2015–21



DEVICES FOR NEWS 2015–21*



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

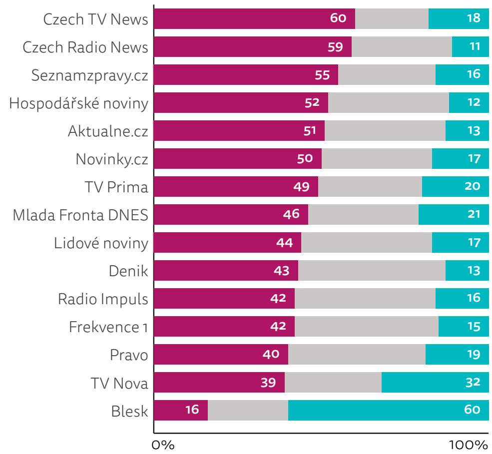
TRUST

After several years of decline, overall trust in news has recorded a slight growth, possibly reflecting the preference for more reliable sources during the pandemic. There have been no significant changes in the brand trust scores, with the public service broadcasters maintaining their position at the top of the list.

DIFFERENT TYPES OF TRUST

News overall	News I use
36% (+3) =33/46	40%
News in search	**News in social**
30%	17%

BRAND TRUST SCORES



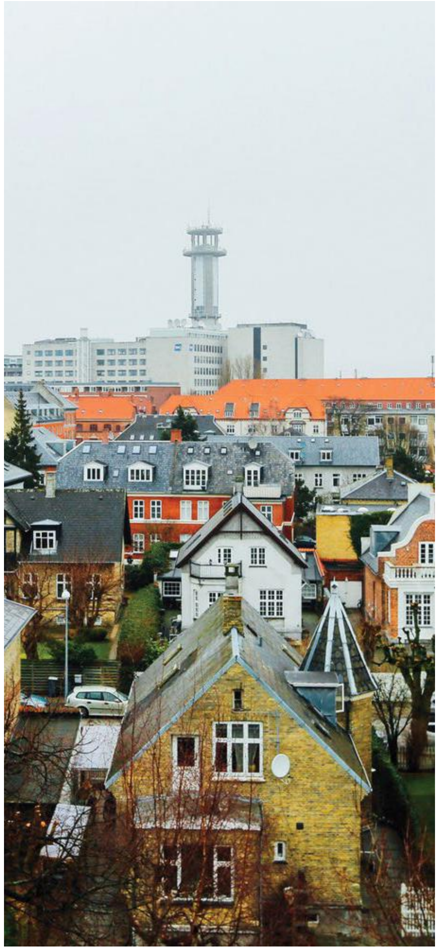
Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

31% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

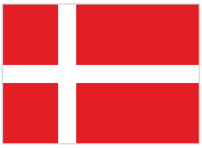
Rank	Brand	For News		For All
1	Facebook	42%	(-3)	70%
2	YouTube	21%	(-2)	66%
3	Facebook Messenger	15%	(-)	51%
4	WhatsApp	14%	(+1)	47%
5	Instagram	10%	(+1)	28%
6	Twitter	5%	(+1)	11%

DENMARK



STATISTICS

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



The main public service broadcaster DR has been restructuring following substantial cuts to its funding and ahead of a new multiyear contract in mid-2021. Private news organisations are gradually compensating for declining print readers and advertising revenue with increased digital subscriptions, together with the substantial annual subsidies they receive, boosted in 2020 by specific COVID- 19 support.

COVID-19 caused a 2.7% fall in Danish GNP in 2020, with a massive and varied impact on the Danish news media. First, it led to an estimated 8% fall in total advertising revenues. Second, falling revenue led to redundancies, with unemployment rising to around 10% by year end, almost a third more than 2019. Third, COVID-19 boosted news media use across platforms, and television in particular. Danes reported accessing news media more often and placing more trust in news overall and in most brands, but relatively few reported increasing their media spend during the pandemic. Towards the end of 2020, news use tended to normalise, especially compared to the spring 2020 bump. Fourth, the Danish government created COVID-19 support measures for media companies. These amounted to an additional €18.7m (144m Danish kroner) in 2020, in addition to the standard subsidy of €53.6m (412m Danish kroner) granted that year – and which are credited with limiting the number of layoffs.

The sizeable annual state subsidies for commercial news media are awarded in proportion to the number of editorial staff, the size and social diversity of their readership, and the amount of democratically important political and cultural content they carry. Niche nationals (e.g. *Kristeligt Dagblad*, *Information*) receive a €3.9m subsidy; national daily broadsheets (e.g. *Politiken*, *Berlingske*) and tabloids (e.g. *BT*, *Ekstra Bladet*) €2.3m–3.4m; regional dailies €0.7–2.3m, local €0.3–0.8m; digital-born brands €0.1–0.8m.[38]

The 20% cuts imposed on DR by the previous right-wing government were reversed by the Social Democrats elected in 2019, and in the end amounted to 420m DKK (€53.6m) of the intended 900m DKK (€117m). Even so, they had already led to the closure of three linear TV channels, though, one, DR3 (aimed at young adults) continues online. Given the continued popularity of streaming services (with weekly use of YouTube at 52%, Netflix 48%, DR 42%, and TV2 20%),[39] both national public service organisations, DR and TV2, launched initiatives in late 2020 to increase news content on their own streaming services.

Across private and public service news providers the turn to audio accelerated, as most news brands offer automated audio versions of news articles. In autumn 2020, DR relaunched and renamed its DR Radio app as DR Sound to integrate its existing broadcast radio programmes with its podcasts. Many news organisations offer daily news or current affairs podcasts free of charge (DR, Zetland, Jysk Fynske, *Altinget*, *Information*, and *Politiken* – which offers them free on two weekdays) attracting thousands of listeners and appealing especially to a young demographic.

Our figures show the numbers paying for news are relatively stable, around 16% over recent years, but news organisations report 2020 as a breakthrough year for online subscriptions. A survey by Danske Medier found that the number of online subscribers had increased by 100,000 since 2019.

After so-called 'ambassador campaigns' by existing members to persuade their friends to sign up, digital-born, 'member'-based news brand Zetland reported its first operating profits in 2020 (since its launch in 2012) with more than 20,000 members.

Online news media are struggling to find ways to counter new data protection regulation of cookies which (1) require site owners to operate consent boxes, allowing easier rejection of some commercial tracking, (2) have led to up to one-third of users rejecting tracking by cookies, and (3) deprive newsmakers of valuable commercial knowledge to resell to advertisers. As a result, more content may be moved behind paywalls. In addition, since September 2020, discrepancies in the ways in which different news organisations implement rules about users' cookie acceptance have meant there has been no reliable cross-industry measurement of online news use (page views, unique visits).[40]

In terms of relations between publishers and platforms, the government is poised to introduce legislation akin to that in Australia, to force Facebook and Google to pay a fee for distributing news content from Danish news organisations.

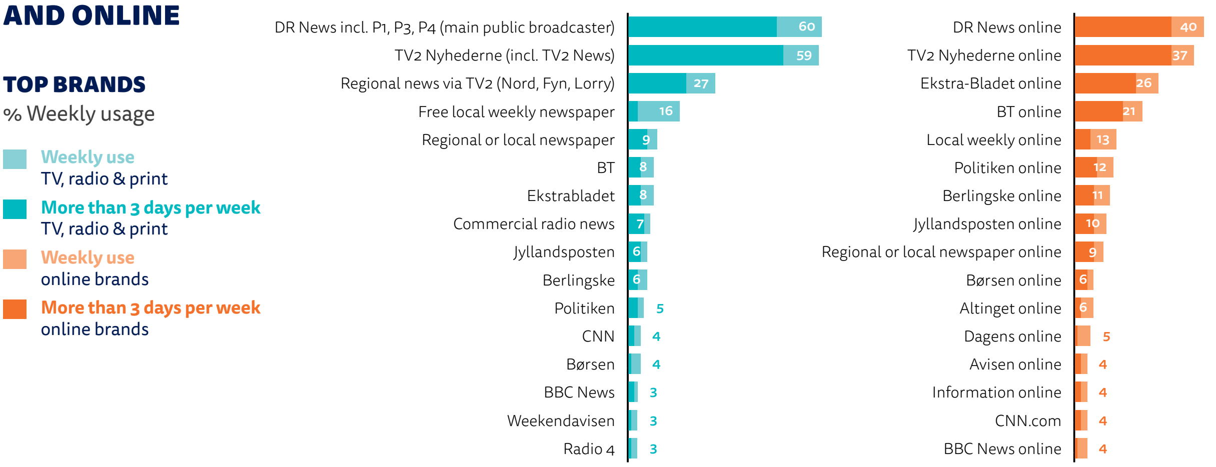
Kim Christian Schrøder,
Mark Blach-Ørsten, and
Mads Kæmsgaard Eberholst
Roskilde University, Denmark

[38] Mediawatch.dk, 20 Dec. 2020.
[39] DR Medieforskning, Jan. 2021.
[40] Mediawatch.dk, 2 Mar. 2021.

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage



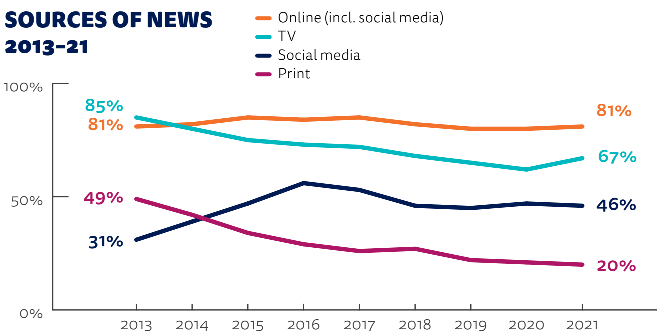
CHANGING MEDIA

Both public service organisations (DR, TV2) have gained users online (by five and eight percentage points respectively) and TV2's television reach also grew by 5pp. Growth in the use of the smartphone for news resumed after plateauing in recent years.

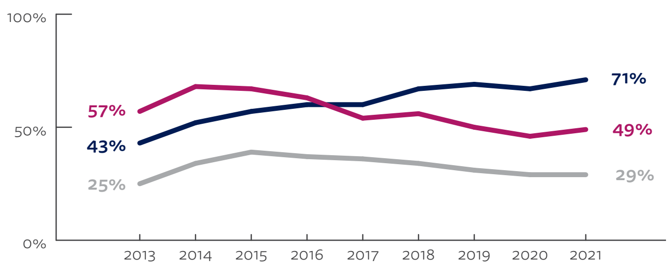
16% PAY pay for **ONLINE NEWS**

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

SOURCES OF NEWS 2013–21



DEVICES FOR NEWS 2013–21



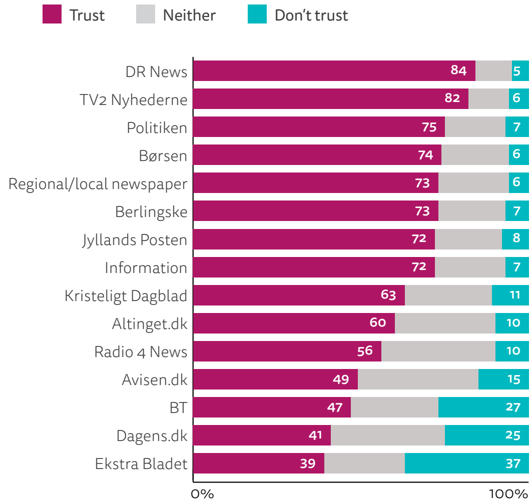
TRUST

COVID-19 seems to have prompted an increased reliance on authoritative information, and overall trust figures recovered dramatically (by 13 percentage points) after last year's (11 point) drop. All news brands saw substantially increased trust, with public service news showing growth of 5–6 percentage points, and similar increases for many tabloid and broadsheet brands.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
59% (+13) =4/46	**66%**
News in search	*News in social*
24%	**13%**

BRAND TRUST SCORES



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

16% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	36%	(-1)	76%
2	Facebook Messenger	8%	(-1)	56%
3	YouTube	7%	(-3)	52%
4	Instagram	6%	(-1)	41%
5	Twitter	5%	(-)	12%
6	LinkedIn	4%	(-1)	19%

FINLAND

STATISTICS

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

The news media environment in Finland is characterised by a strong regional press, a strong public service broadcaster (Yle), one widely read national daily *(Helsingin Sanomat)*, and two popular evening tabloids, both reaching over half of the adult population. Despite financial pressures, Finnish news media have an above average level of paying for online news and remain the most trusted among the countries surveyed.

Coronavirus hit the Finnish news media hard. Advertising for newspaper publishers declined by one-fifth from 2019 (free sheets and online website included) and layoffs increased. Journalists largely moved to working from home, with reporting dominated by the infection rate and other COVID-19 developments. News organisations with online paywalls frequently lifted them for COVID-19 news.

Figures for news sources used generally show little impact from the pandemic, despite some significant increases in use of broadcast brands online, with increases of five and seven percentage points for Yle and MTV online respectively. However, changes in trust are more pronounced, with trust in news overall increasing 9% points from 56% to 65%, increasing Finland's trust lead over most other countries even as their trust figures often rose too. The pandemic also seemed to increase people's trust in democratic institutions in Finland more generally.[41]

In addition to temporary COVID-19 support for all businesses, the government created a one-off subsidy scheme to support journalism during the pandemic. Grants totalling €7.5 million were awarded to 97 companies, on the basis of €3,700 per working journalist, up to a maximum of €800,000 per company.

There are also plans to introduce a more permanent direct subsidy mechanism for news media, which currently is based on the indirect support of the reduced 10% VAT rate applied to newspapers, books, and magazines, both online as well as in print. If realised, the new scheme would bring Finland somewhat closer to the other Nordic countries with more generous subsidies.

The longstanding debate about the position of the public service broadcaster (Yle), moved forward when the government introduced a bill restricting Yle's right to publish online news in text form if unrelated to their audiovisual content. The bill's origins lie in the Finnish Media Federation's 2017 complaint to the EU Commission claiming that Yle's online news in text form contravened EU state aid legislation and could undermine plurality. After consultations with the Commission, the government proposed a change that restricted Yle's text-based content online to that related to their audiovisual content or covered by specific exceptions. For example, short text-based updates on fast-moving news events would be allowed even if unrelated to Yle's video or audio content.

The proposed changes in the Yle law have met with criticism. Commercial news companies would like a stricter definition of text-based content's relation to Yle's audiovisual content and fewer exceptions. Others complain that restricting Yle's offerings undermines citizens' rights of equal access to quality journalism and that restrictions based on distinguishing text, audio, and video content are outdated. In March 2021, the bill was still moving through Parliament.

The two biggest private Finnish media companies, Alma Media and Sanoma, refocused their strategies in February 2020 when Sanoma announced that it would buy 15 regional and local newspapers and the regional printing operations from Alma Media for €115m, with 365 staff transferred to Sanoma. Alma Media retained its national papers and magazines, including the evening

tabloid *Iltalehti* and the economic newspaper *Kauppalehti*, but welcomed the opportunity to divest from a declining regional print business to focus on digital services. A year later Alma bought Nettix, a provider of several online marketplaces and the news aggregator Ampparit.

Sanoma, for its part, gained new digital subscribers, which gives it economies of scale both in developing digital journalism and in advertising markets. Sanoma also strengthened its position compared to Keskisuomalainen, another company that has expanded its network of regional newspapers in recent years. Now Sanoma and Keskisuomalainen account for over half of the subscription and advertising revenues of the Finnish newspaper publishers.[42]

Sanoma's acquisition of Alma Media's regional titles marks another move towards increased concentration of Finland's regional press. In the longer term, given rising delivery costs (most print subscriptions include home delivery) and declining population outside the largest cities, the trend may lead to merging or closing titles. In January 2020, the Ilkka-Yhtymä group provided a foretaste of future trends by merging its two regional newspapers, *Ilkka* and *Pohjalainen* to create the new regional paper *Ilkka-Pohjalainen.*

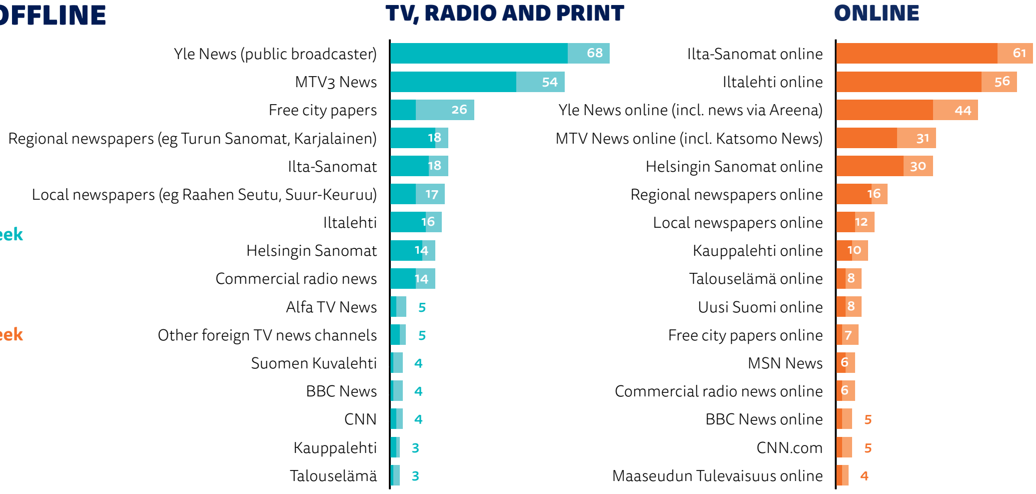
Esa Reunanen
Tampere University, Finland

[41] https://www.eva.fi/en/blog/2020/06/11/covid-19-crisis-had-an-exceptional-impact-on-finnish-political-views/
[42] Suomen Lehdistö, 2/2020.
[43] https://www.kantar.fi/uutiskirje/2020/suomalaisen-mediapaiva

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



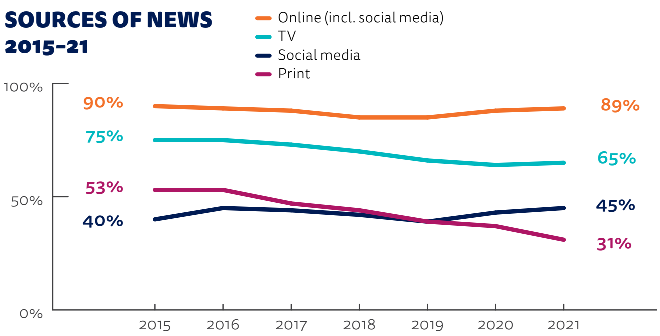
CHANGING MEDIA

One year after the COVID-19 crisis began, our survey shows limited impact on the sources of news or the mix of devices. However, during the first half of 2020, the daily time used for reading newspapers and magazines online was over one-third higher than a year earlier.[43]

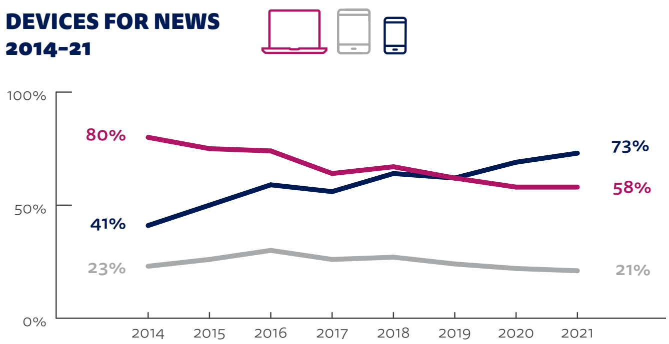
20% pay for **ONLINE NEWS**

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

SOURCES OF NEWS 2015–21



DEVICES FOR NEWS 2014–21



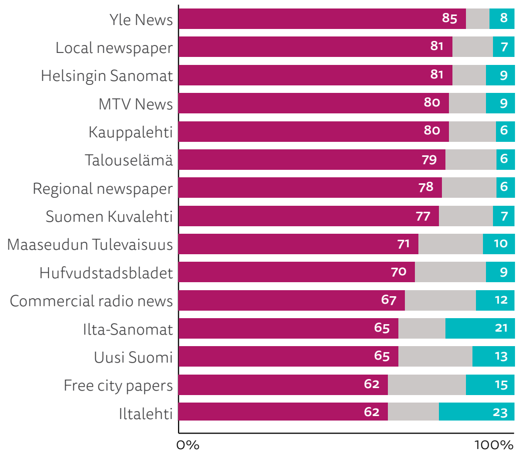
TRUST

Overall trust in news has increased by nine percentage points, reversing the decline of recent years. However, the trust figures in individual news brands have stayed more or less flat. Public broadcaster Yle remains most trusted, along with local newspapers. The two evening tabloid newspapers and their websites are widely used but have lower levels of trust.

DIFFERENT TYPES OF TRUST

News overall	News I use
65% (+9) 1/46	73%
News in search	**News in social**
30%	18%

BRAND TRUST SCORES



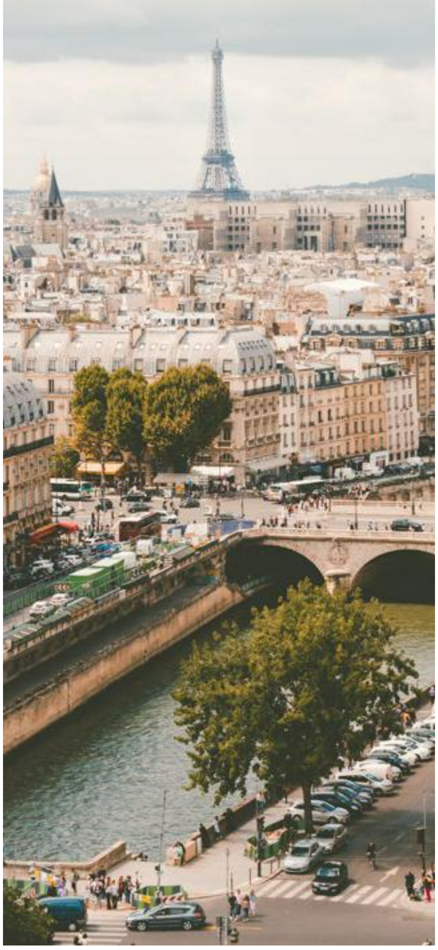
Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

28% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

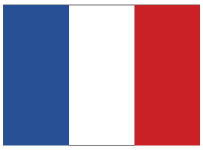
Rank	Brand	For News		For All
1	Facebook	32%	(-)	68%
2	WhatsApp	13%	(+1)	72%
3	YouTube	13%	(-2)	69%
4	Instagram	8%	(+1)	43%
5	Twitter	8%	(-)	18%
6	Facebook Messenger	4%	(-1)	37%

FRANCE



STATISTICS

Population	65m
Internet penetration	92%



France was hit early by COVID-19 and adopted a very strict national lockdown in March and April 2020, with more limited measures in autumn, followed by a renewed national lockdown in April 2021. The main media impact was seen in rising TV and online news consumption, increased trust, and falling advertising revenues, but with some brands recruiting record numbers of digital subscribers.

In the first French lockdown, people stuck at home had few distractions other than their screens. Smartphone use rose, and TV news made a comeback with record viewing levels of four hours per day. Some channels extended their evening bulletins with government COVID-19 related announcements dominating coverage, often delivered in a very top-down manner. President Emmanuel Macron made several TV addresses – one seen live by almost 36 million viewers. Prime Minister Jean Castex even showed up on Twitch, in an attempt to reach younger audiences.

Traffic to most news websites increased as a result of the pandemic – at least for a time. The increase was particularly pronounced for regional or local newspapers online, which reached 21% weekly.[44] COVID-19 restored to some extent the relevance of local news, especially for news about developments in nearby hospitals, shops, schools, and the neighbourhood generally. France's best-selling regional paper, *Ouest France*, opened up two months' free access to its online content for people registering with an email address.

But COVID-19 also generated serious financial pressures. The 2020 advertising revenues fell from 2019 by 11% for TV, 13% for radio, and 24% for the press.[45] The government estimated the overall 2020 pandemic loss for the press sector at 16% of turnover, or €1.9bn. In August 2020, the government added to existing support schemes with a new subsidy package of €483m awarded over two years to make up for COVID-19 related losses and aid the move to digital.

The year 2020 also brought some good news from within the industry. Many publishers reported unprecedented increases in digital subscribers. *Le Monde* now has a record 360,000 digital subscribers (plus 100,000 print only), with a combined target of 1m by 2025. *Le Figaro* reported 205,000 digital subscribers, a 45% increase on 2019, with subscriptions growing at three times their usual rate in March–April 2020. Digital-born Mediapart, also reported that 2020 had delivered its strongest annual growth in its 13 years of existence, resulting in a total of 218,000 paying subscribers.

Some publishers should also benefit from a new deal with Google, following a competition authority decision requiring negotiations in April 2020.[46] Almost a year later Reuters News[47] reported some financial details of agreements between Google and a group of 121 national and local French publishers to pay $22m p.a. over three years to end their long-running copyright dispute, and to feature these publishers' content in Google Showcase. Payments are confidential and seem to be calculated on an individual basis, but Reuters reported them as ranging from about $1.3m for *Le Monde* to smaller fees for regional papers. Leading national dailies such as *Le Monde*, *Libération*, and *Le Figaro* were also reported to have obtained a further $3.6m p.a. each, on top of the fee in the agreement, for selling subscriptions through Google. Publishers not included in these deals have complained, while none of the parties has confirmed any of these figures.

A proposed new security bill revived tensions between journalists, police, and the government. Article 24 of the bill created a new offence of distributing images that might 'harm the physical or mental integrity' of police officers, with penalties of up to a year in prison or a €45,000 fine. Media organisations protested, seeing this as an attack on press freedom. At the same time a video of a police assault on a black man in Paris released by the digital-born Loopsider, was viewed more than 15 million times and fuelled criticism of the bill. After amendments, publication will now be allowed if there is no 'obvious intent' to harm the police officers.

This was also the year when #MeToo took off in France, with an increased focus on misogyny and sexual harassment in the workplace, including politics and the media. Women have been speaking out and new feminist media titles have been launched, including newsletters such 'Les Glorieuses' or 'Women who do stuff', and podcasts like 'Les Couilles sur la Table' or 'La Poudre'.

Alice Antheaume
Executive Dean
Sciences Po Journalism School

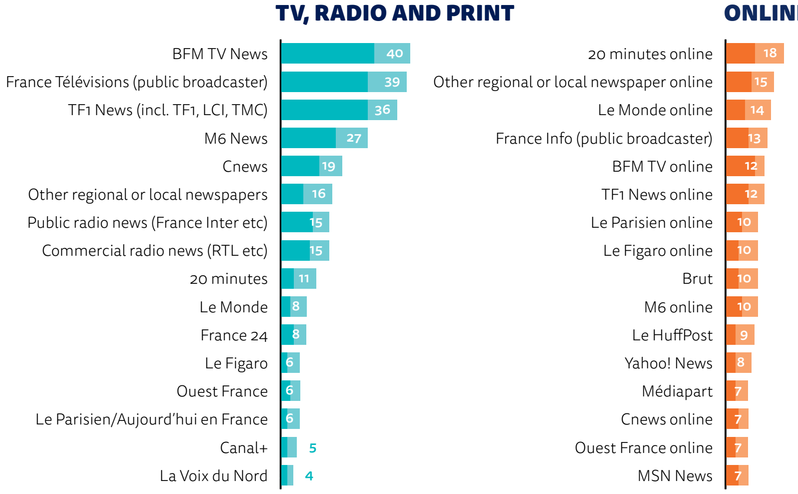
44 The 21% figure is the combined reach of *Ouest France* online and other regional or local newspapers online whilst removing the overlap between people consuming more than one local brand.
45 https://www.cbnews.fr/etudes/image-bump-recettes-publicitaires-baisse-114-2020-59510
46 https://www.lemonde.fr/economie/article/2021/01/21/google-a-signe-un-accord-pour-remunerer-la-presse-francaise-au-titre-du-droit-voisin_6067045_3234.html
47 https://www.reuters.com/article/us-google-france-copyright-exclusive-idUSKBN2AC27N

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



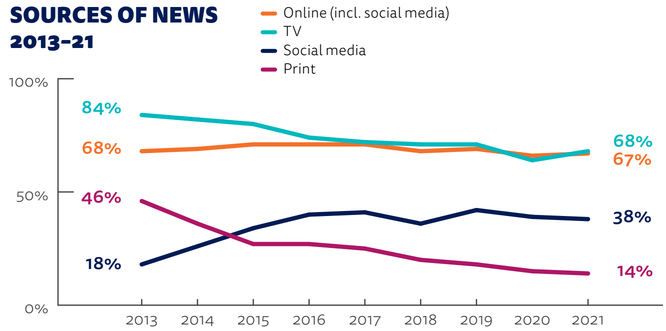
CHANGING MEDIA

Broadcast brands benefited online and offline from growth in TV news. Increased use of smartphones reflects interest in news updates during the pandemic. Facebook remains the top social media network for news but use declined for the second year.

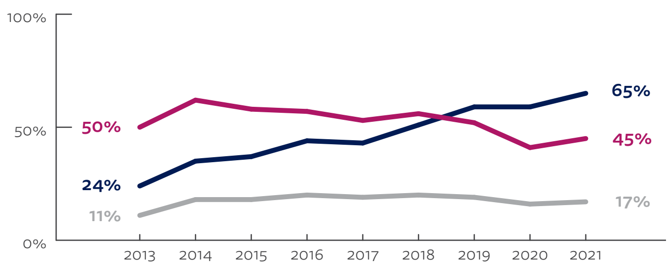
11% pay for **ONLINE NEWS**

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

SOURCES OF NEWS 2013–21



DEVICES FOR NEWS 2013–21



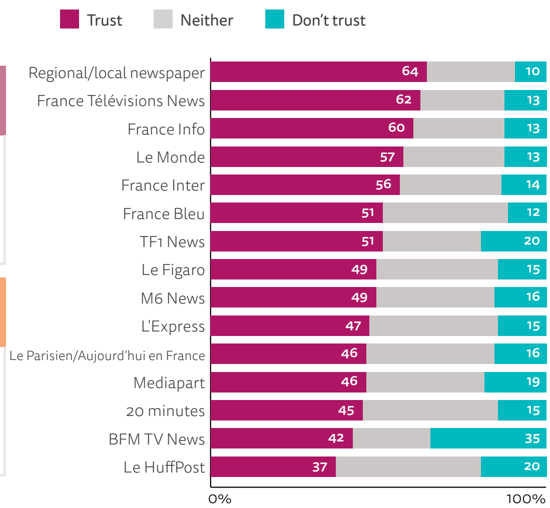
TRUST

Overall trust in news increased by seven percentage points but remains low by international standards. Regional/ local newspapers are most trusted, followed by the public service brands (France TV and France Info). *Le Monde* is the most trusted national newspaper, while the very popular 24-hour news channel BFM TV has almost equal levels of distrust and trust (35% and 42%).

DIFFERENT TYPES OF TRUST

News overall	*News I use*
30% (+7) =43/46	**39%**
News in search	***News in social***
20%	**15%**

BRAND TRUST SCORES



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

27% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	39%	(-4)	60%
2	YouTube	24%	(+1)	57%
3	WhatsApp	15%	(+6)	38%
4	Facebook Messenger	14%	(+2)	38%
5	Instagram	12%	(+3)	31%
6	Twitter	10%	(+1)	17%

GERMANY

STATISTICS

Population	82m
Internet penetration	96%

The Coronavirus pandemic led to an initial surge in interest in news and increased trust in traditional news brands. However, COVID-19 has also exacerbated some financial challenges while helping fuel debate over the need for greater diversity of views and people within the media.

COVID-19 boosted interest in news, particularly early on, and public service broadcasters (PSBs) and continuous news channels benefited the most from this. Weekly use of n-tv, for example, rose by six percentage points in our survey this year and its trust ratings rose too. Coverage of the pandemic has also prompted vigorous debate, with news media accused initially of being insufficiently critical of lockdown measures. As COVID-19 advanced at very different rates across Germany, government responses came under more criticism.

Attacks on the supposed lack of diverse perspectives in the media were spread on social media and messaging apps such as Telegram. Self-styled 'Querdenker' ('lateral thinkers') questioned the scientific consensus – sometimes citing questionable scientific 'experts' – and protested against the lockdowns on social media and in the streets. Journalists were assaulted when covering demonstrations and accused of false or pro-government reporting. Reporters Without Borders cited attacks on German journalists by extremists and conspiracy theory believers during protests against pandemic restrictions as contributing to Germany losing its 'good' rating in the 2021 Press Freedom Index.[48]

In addition, sparked in parts by the Black Lives Matter protests in the USA and resurgent interest in gender equality, debate grew around coverage of racism, the right language to use to address different marginalised groups, or lack of diversity among those working in newsrooms and appearing in broadcast coverage. They generally included the accusation that 'old white men' dominate coverage unduly. One response has been the use of gender-neutral language by some organisations and journalists.

Critics – from multiple quarters – complained about the media's perceived lack of impartiality; our data suggest that it is those on the right of politics who feel most under-represented by and place least trust in the media. Those on the right complained about the dominance of left-green topics and opinions. Some might point to brands, such as *TAZ*, *Stern*, or RTL, which often take 'positions' and officially cooperate with movements such as the school student climate strikes 'Fridays for Future'. Meanwhile some publishers are preparing to fill what they see as the unmet demand for conservative voices on TV. Springer has announced plans to start a new *Bild* branded TV channel before this September's general elections, adding to their existing *Welt* TV channel.

PSBs can't take positions but are responding cautiously to accusations of being one-sided. *Die Tagesthemen*, for example, one of the main news programmes on ARD, created a new format 'for and against', where a topic is commented on from two perspectives.

All mainstream media have been accused of giving inadequate coverage to former East Germany. This may have contributed to why the PSBs' monthly licence-fee increase of €0.86, proposed by the independent commission (KEF), was vetoed by the state parliament of Saxony-Anhalt even though approved by the other 15 state parliaments. PSBs will lose out on €365m in 2021, potentially leading to cuts in programming.

Private news media experienced falling advertising revenues and daily print sales. But weekly newspapers and digital subscriptions are doing better. *Die Zeit*, *Spiegel*, and *Bild* all increased their digital subscribers. *Sueddeutsche Zeitung* reported a doubling in digital subscribers in 2020 to reach 180,000. BILDplus reported 500,000 digital subscribers by year end, 10% up on 2019. But this growth may not be enough to make up for declining income elsewhere.

A few publishers may be hoping that deals for use of their content in outlets such as Google Showcase or Facebook News will help. But the issue divides the industry. While the publishers' associations and Springer, among most others, are opposed to participation, some major publishers (e.g. of *Spiegel* and *Die Zeit*) are reported to have signed agreements to participate in both initiatives.

Meanwhile, the Federal Ministry of Economics withdrew plans to support newspapers' digital transformation with €220m. The scheme had excluded digital publishers and raised many questions regarding the independence of the press.

Last year saw further consolidation, particularly in the regional market, with possible consequences for the density and diversity of coverage. Some companies agreed to work together on areas such as national reporting, a few titles were acquired by other publishers, and others were bought by companies from outside the media industry.

Sascha Hölig and **Uwe Hasebrink**
Leibniz Institute for Media Research/ Hans Bredow Institute, Hamburg

[48] https://www.euractiv.com/section/digital/news/world-press-freedom-index-2021-eu-getting-more-heterogeneous/

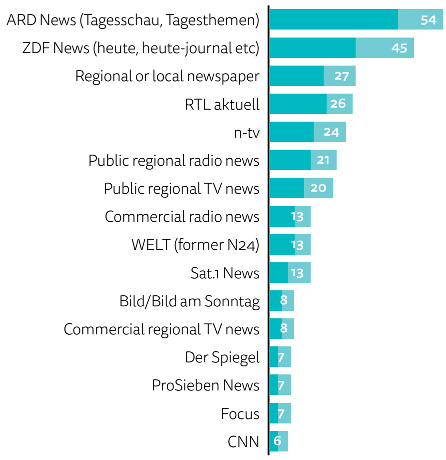
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

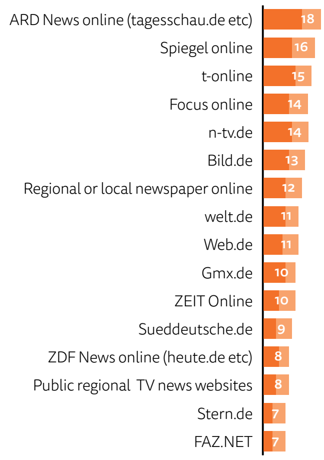
% Weekly usage

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

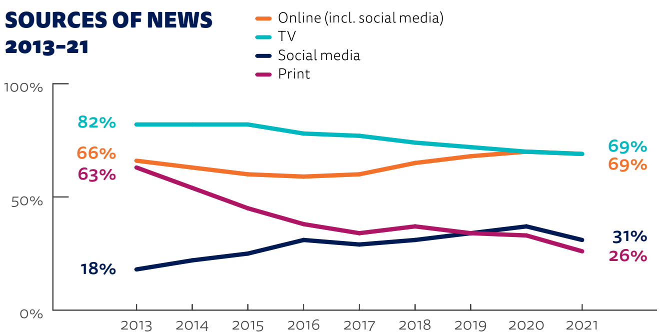
While the smartphone extends its lead as the most important device for online news, people in general rely on traditional news brands. TV brands benefit from the desire for reliable news whereas Facebook's role as news source decreases.

9% pay for **ONLINE NEWS**

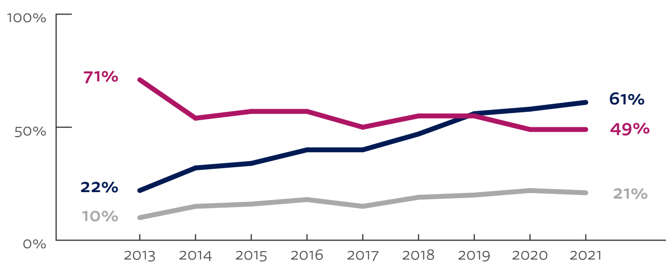
PAY

25% listen to **PODCASTS** in the last month

SOURCES OF NEWS 2013–21



DEVICES FOR NEWS 2013–21



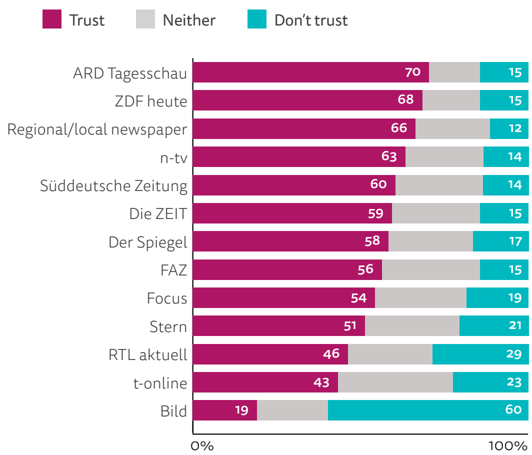
TRUST

During the ongoing pandemic, more people in Germany placed their trust in the news media in general and in specific brands they use. While PSBs and local news media still obtain the highest trust scores, the figures of the 24-hour news channel n-tv grew the most. Trust in search and social media remains at a low level.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
53% (+8) =10/46	**62%**
News in search	*News in social*
25%	**14%**

BRAND TRUST SCORES

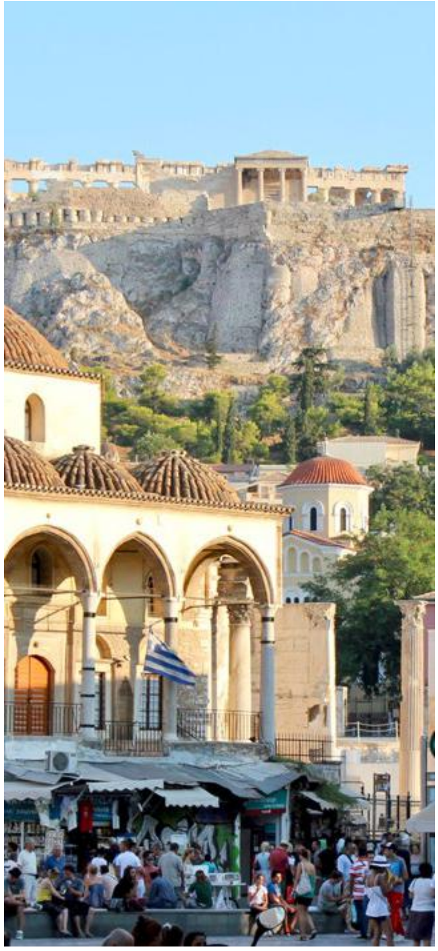


Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

19% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	18%	(-4)	44%
2	WhatsApp	17%	(+1)	71%
3	YouTube	16%	(+2)	58%
4	Instagram	7%	(+1)	29%
5	Twitter	6%	(-)	12%
6	Telegram	4%	(+2)	12%



GREECE

STATISTICS

Population	**11m**
Internet penetration	**73%**

The media market in Greece is characterised by digital fragmentation, lack of trust in news, a politically polarised press, and one of the highest uses of social media for news.

Longstanding political polarisation in Greece was reflected again in its media landscape in 2020. The news media were also badly affected by the pandemic, with TV advertising expenditure falling by 61% in 2020 compared to 2019.[49] During the first wave of COVID-19, the government's decision to spend €20m on a 'stay at home' advertising campaign was heavily criticised. Eventually, the campaign funded 1,232 news organisations, including 627 digital news websites, some of which were not legitimate news organisations. The fact that 54% of Greek respondents opposed the government stepping in to help commercial news organisations unable to support themselves, one of the highest rates across 46 countries, may have been influenced by this controversy.

Syriza, the largest opposition party, blamed the government for unfavourable coverage in the news bulletins of ERT, the Public Service Broadcaster, following a long tradition of similar complaints from opposition parties. In turn, the current government is accusing a Syriza ex-minister of interference in the TV licensing process under the previous administration.

In March 2021, discussion around the role of social media platforms in politics and the public sphere intensified. The Prime Minister called social media a 'threat to democracy', addressing the toxic nature of public debates and the levels of misinformation on social media. This was met with a strong backlash by the opposition and social media users who accused the Prime Minister of attempting to criticise information gateways he cannot control. Meanwhile, the Facebook-approved fact-checker for Greece, 'Greek Hoaxes', has been at the forefront of many discussions, controversies, and attacks, from both left and right.

The national TV landscape in Greece was relatively stable last year after a long period of turmoil, including broadcaster closures and licensing disputes. One of the few changes was the relaunch of MEGA TV, for years the largest commercial broadcaster in Greece, after being shut for 1½ years because of financial difficulties. It was bought by Evangelos Marinakis, who recently acquired many legacy outlets. The station has yet to achieve the leading role it had before. The public service broadcaster's news bulletin showed modest increases in ratings, while there has been a strong push towards digital with the establishment of a public service web platform, ERTflix, which includes news but is primarily used for entertainment programmes.

The digital news market in Greece remains fragmented. The average Digital News Report survey respondent in Greece uses more digital news sources per week than respondents from all other 46 countries in the sample, other than Kenya. This finding highlights the casual and fragmented nature of digital news consumption in Greece. This may help explain the lack of an online news payment culture in Greece, with the exception of some niche outlets.

Podcast use increased during the past year in Greece – 40% of online news users tell us that they listen to a podcast in a given month. One of the most successful Greek podcast initiatives is pod.gr, a podcast-only media outlet which publishes on various topics, including news and politics. A few digital-savvy news organisations like LiFO and 24Media were also successful in producing their own series of podcasts.

In early 2021, Greece had its own #MeToo moment, with hundreds of women and men publicly revealing their experiences of sexual misconduct and abuse following the public revelations of Sofia Bekatorou, a sailing champion. The majority of revelations came from those working in the entertainment sector, causing a public sensation. However, as of March 2021, there had been no public debate about sexual abuse within journalism. Mainstream journalism was also largely absent from the coverage of the #MeToo movement in Greece; Greek news organisations reported revelations but did not lead with their own investigative reporting, as was the case in other countries.

In recent years, we have seen a range of digital initiatives aiming to strengthen investigative and independent journalism in Greece. One of these is Reporters United, a hub aiming to support investigative journalism in Greece and connect it to international networks. Another is slow news journalism Inside Story, which broke a number of investigative stories this year, most notably related to the government's handling of pandemic data. Finally, iMedD (The Incubator for Media Education and Development), a non-profit funded by the Stavros Niarchos Foundation, was launched to support independent journalism and highlight best practice.

Antonis Kalogeropoulos
University of Liverpool

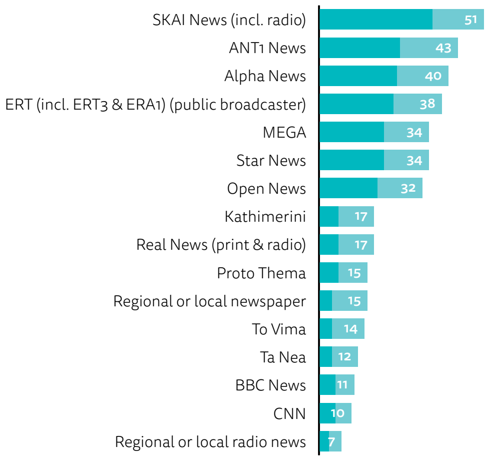
[49] https://medianalysis.net/2020/12/12/ta-mesa-enhmerosis-stin-epochi-tis-pandimias/

WEEKLY REACH OFFLINE AND ONLINE

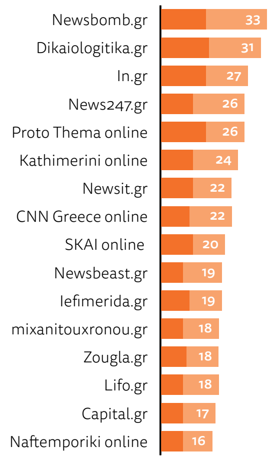
TOP BRANDS
% Weekly usage

- 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

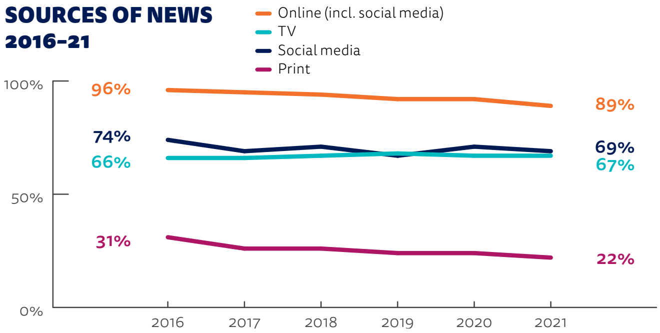


CHANGING MEDIA

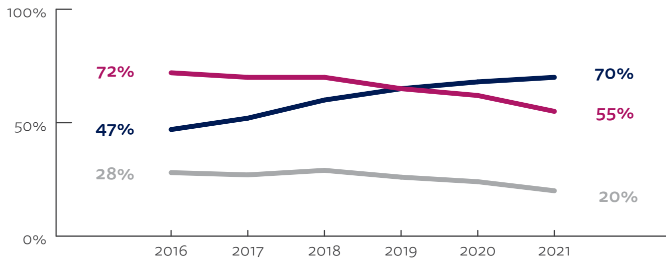
Smartphones are now far ahead of computers in terms of weekly use, with 70% and 55% respectively. More than two-thirds (69%) of Greeks online get their news via social media, a much higher share than most countries in our sample.

12% pay for **ONLINE NEWS**

SOURCES OF NEWS 2016–21



DEVICES FOR NEWS 2016–21



TRUST

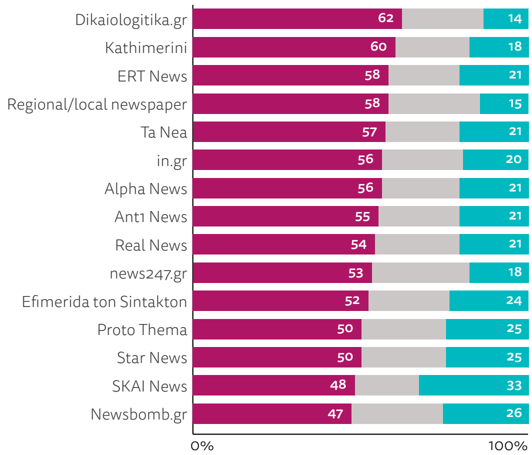
As in most other countries trust in news increased, by four percentage points in Greece. Despite the increase, Greece is still well behind most other countries in trust. The survey took place in January/February 2021 and thus does not reflect controversies over protest news coverage in March 2021.

DIFFERENT TYPES OF TRUST

News overall	News I use
32% (+4) =38/46	33%
News in search	**News in social**
35%	22%

BRAND TRUST SCORES

Trust / Neither / Don't trust



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

37% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	52%	(-5)	76%
2	YouTube	33%	(+1)	78%
3	Facebook Messenger	23%	(+1)	63%
4	Viber	23%	(+6)	64%
5	Instagram	15%	(-1)	50%
6	Twitter	12%	(-1)	25%

HUNGARY

STATISTICS

Population	9.7m
Internet penetration	89%

The Coronavirus-related public health and socio-economic crisis has shaped Hungarian media in 2020 in numerous ways: not only did it set the agenda, but combined with strong political factors, it further shrank the space for independent journalism, and contributed to the polarisation of the public.

News consumption increased in the first half of 2020, especially from television and online, with radio and print lagging behind. The increase was due to people's need for information amid the unfolding crisis, and because life under lockdown meant more time at home. During the first wave of the pandemic, traditionally trusted online news portals and the main television channels were the leading sources of news, with public service media gaining some ground in news consumption.[50]

Even though news outlets experienced a bump in reach early on in the pandemic, this was not generally reflected in revenues, as total advertising spend dropped by an estimated 38% year-on-year.[51] This posed immense challenges for media companies, especially for print and for smaller, independent media outlets, while media outlets with ties to the government received significant state funding in the form of state advertising.[52] Hence, the gap between the financial stability of non-government and pro-government media is widening.

In addition to the pandemic and the economic crisis, politics left a deep mark on Hungarian media in 2020. The country was already ranked 89th out of 180 countries in the 2020 Reporters Without Borders Press Freedom Index and had established itself as a leading example of media capture, with allies of Prime Minister Viktor Orbán buying into media companies to manipulate public opinion and influence voting. But the trend took a major step forward in July 2020 with the firing of the editor-in-chief and consequent resignation of the editorial board of Index, the leading online site, and a major remaining bastion of independent media in Hungary. The changes followed the acquisition of a 50% stake in the firm controlling Index's finances by a pro-Orbán media manager, Miklos Vaszily, CEO of the pro-government broadcaster TV2. Index had been seen as a trusted online news source on both sides of the political spectrum. It was very widely used by news consumers, regardless of their political stance, in spite, or even because of, its critical reporting of misdeeds by government and opposition alike, a rarity in the highly polarised political environment.

The takeover and subsequent events at Index were not unexpected, but they shook the shrinking Hungarian public sphere by further increasing polarisation and decreasing the chance of critical information reaching the public. Some of the former journalists of Index started a new news portal, Telex, funded by audience donations. The fundamental changes at Index did not shake the portal's position as one of the leading news sources, but its trust score fell.

Aside from the politicised distribution of state advertising and the case of Index, politics shaped the media in other ways. The ruling parties introduced legislation restricting press freedom in the name of 'preventing the pandemic' or 'averting the consequences of the pandemic', which tended to encourage journalistic self-censorship. The Hungarian government was criticised for not providing clear and credible information, with government data on the pandemic often inaccurate, difficult to interpret, or simply absent. Similarly, reporting on the pandemic was very constrained, with journalists unable to ask direct questions at official press conferences, and only the government-controlled National News Agency allowed to report from hospitals and vaccination points.

Independent media outlets responded to the challenges posed by the deteriorating situation in a variety of ways: many introduced crowdfunding campaigns and paywalls, which is reflected in the increasing numbers of our respondents who pay for news; strengthened their audience engagement activities; produced content in a variety of formats such as podcasts and videos; and others became masters in data journalism and visualisation to make up for the lack of publicly available information on the pandemic.

Though these efforts are valuable, they cannot do everything one would want from independent journalism. This is especially troubling in a time where research suggests that public service media are failing to fulfil their remit and – according to independent research – have been focused on promoting the government narrative.[53] The dearth of widely used, widely trusted, robust independent news provision risks contributing both to polarisation and politicisation of public discourse and, at worst, can put lives at risk in a situation where trustworthy information is a question of life and death.

Eva Bognar
Center for Media, Data and Society, Central European University

[50] https://nmhh.hu/dokumentum/213415/NMHH_PSYMA_COVID_JELENTES_fin.pdf
[51] https://wecan.net/learning-to-ride-the-waves-of-covid-19/?fbclid=IwAR1dpVYJQRov5v6fLp8XteHhTuhszy4n8blnaBzWQb_ae7CYqXMz4ZQCkyE
[52] h https://media1.hu/2021/03/24/k-alaku-valsagot-okozott-a-koronavirus-a-magyar-mediapiacon/?fbclid=IwAR2IDe94RKTbKpMrLtPIwifIpRnba-7FkYrBnZopQtp6DL-3Dql74b6JmVQ
[53] *Mérték Médiaelemző Műhely: Szúrópróba*, 28 (2020), https://mertek.eu/wp-content/uploads/2020/12/Szuroproba_28.pdf

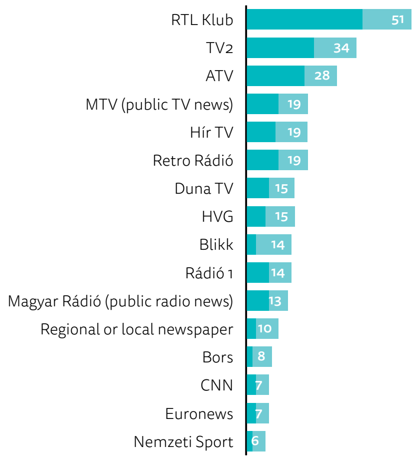
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

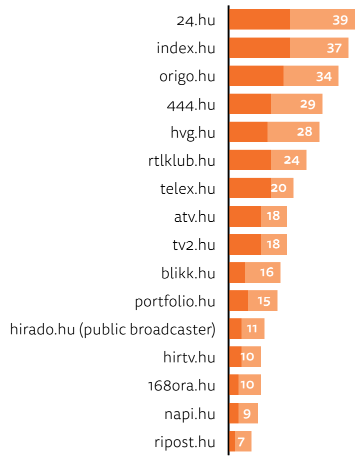
% Weekly usage

- **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

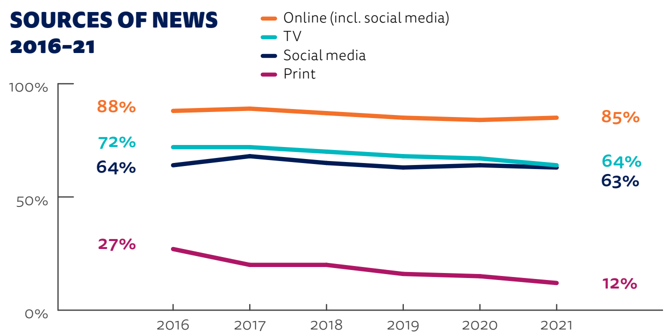


CHANGING MEDIA

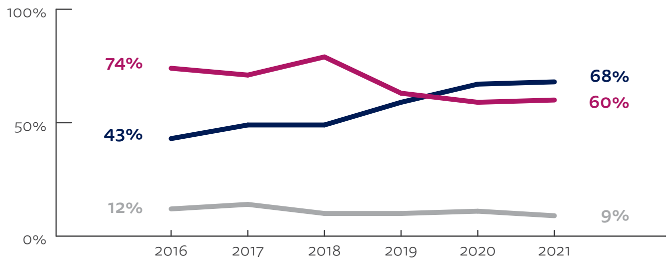
Online continues as the top source for news, while print has further declined in 2020 and many titles are in deep financial trouble. Smartphones are the most common devices for news consumption, with computers a close second.

14% pay for **ONLINE NEWS**

SOURCES OF NEWS 2016–21



DEVICES FOR NEWS 2016–21*



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

TRUST

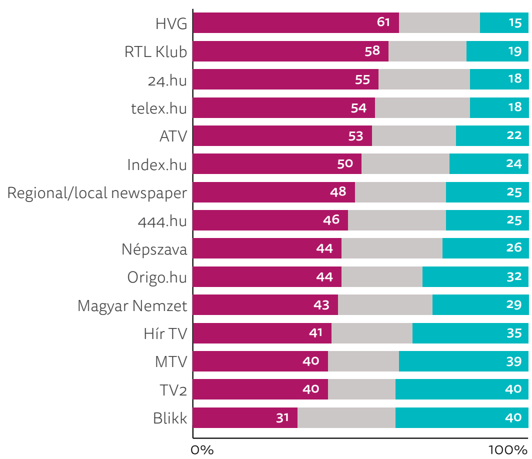
Hungary, with a highly polarised public, has one of the lowest news trust scores in our survey. Low levels of trust in public service media are particularly problematic. The takeover of Index by people with ties to the government is reflected in a decrease in trust (-7 percentage points).

DIFFERENT TYPES OF TRUST

News overall	News I use
30% (+3) =43/46	53%

News in search	News in social
38%	24%

BRAND TRUST SCORES



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

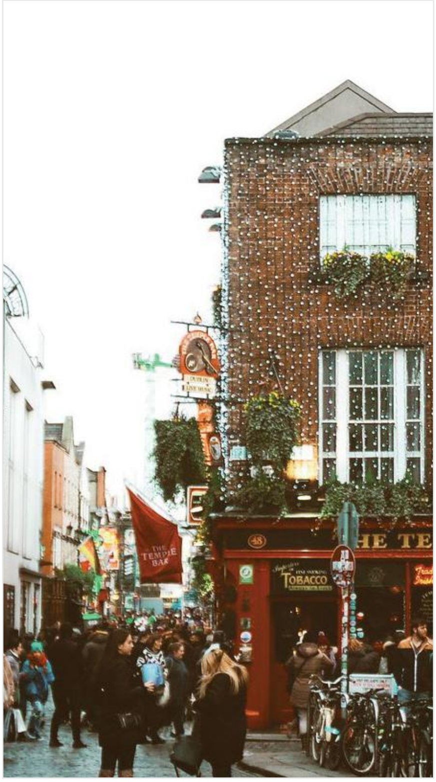
32% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	59%	(-2)	81%
2	YouTube	26%	(-1)	76%
3	Facebook Messenger	12%	(-1)	68%

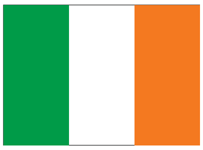
Rank	Brand	For News		For All
4	Instagram	6%	(-1)	32%
5	Twitter	4%	(-)	15%
6	Pinterest	3%	(-)	22%

IRELAND



STATISTICS

Population	**4.8m**
Internet penetration	**92%**



Coronavirus has dominated the news in Ireland over the past year, with audiences able to follow live press conferences with government ministers and health and emergency officials on an almost daily basis, along with detailed reporting on every aspect of the crisis. Strong interest in COVID-19 appears to have reinforced the position of the most trusted brands.

Uncertainty in politics caused instability on many fronts in the first half of 2020. A February election resulted in an unprecedented three-way split between the centre-right parties Fianna Fáil and Fine Gael and the Irish republican left-wing party Sinn Féin. Each won an equal share of the vote, but Sinn Féin had the most first-preference votes. The latter's popularity with young people can partly be explained by a strong social media campaign, particularly on Facebook. In the end, coalition negotiations dragged on until June, when Fianna Fáil, Fine Gael, and the Green Party united against Sinn Féin and agreed to form a government.

Interest in public service health announcements was demonstrated in March 2020 by the St Patrick's Day COVID-19 speech by then Taoiseach Leo Varadkar, which was watched by 1.7 million viewers. The subsequent RTÉ nine o'clock television news bulletin was watched by 1.3 million. Throughout the various COVID-19 lockdowns, the nation's viewers have turned to the public service broadcaster, RTÉ, in high numbers. This is reflected in the weekly reach figures showing RTÉ retaining its place as the top news source in both the offline and online categories, with increases of five and eight percentage points respectively. Nonetheless, more than a quarter of a million people evaded the national licence fee, which cost the corporation €50 million in lost revenue.

In the commercial news sector, COVID-19 has created the perfect storm with a precipitous downfall in advertising and lockdowns restricting people's ability to buy print newspapers. Companies that sought temporary layoffs, closures, pay cuts, or redundancies included the local and regional newspaper companies Iconic Newspapers Group, Johnston Press Group, Local Ireland, and Journal Media publishers of the digital-born TheJournal.ie. However, in more positive news, our data show TheJournal.ie and the *Irish Times* increased their weekly online reach by four and seven percentage points respectively, along with a four percentage point increase (to 16%) in people reporting paying for news online. The *Irish Times* reported subscriptions growing in 2020 at three times the rate of 2019 (when they reached 90,000), while Independent.ie reported more than 30,000 subscribers by the end of 2020.[54]

To offset the dire situation for local radio stations, the government asked the Broadcasting Authority of Ireland (BAI) to implement a waiver of the broadcasting levy, a move which saved the sector almost €1 million.

To explore new ways to secure the sustainability of Irish media into the future, the government set up the Future of Media Commission which aired industry and expert testimony in a series of 'Thematic Dialogues' in early 2021. Many of the submissions focused on the fact that big tech companies had taken the lion's share of the digital advertising spend. According to Core's 'Outlook 21 – Media Forecasts' report,[55] Google and Facebook 'accounted for 84.4% of all online advertising investment and 44.6% of the total media market'. NewsBrands Ireland, the industry's representative organisation, summed up the assorted challenges in its submission: 'Declining print circulation, draconian defamation laws, changed advertising models, and a fundamental imbalance of power between platforms and publishers have put enormous pressure on news media outlets.' The Commission recommendations will be published later in 2021.[56]

The European Union's 2018 Audiovisual Media Services Directorate (AVMSD) updated the regulatory environment for audiovisual media services and extended some rules to video-sharing platforms. The revised directive has not yet been transposed into national legislation. Similarly, the date for the introduction of the proposed Irish legislation, the Online Safety and Media Regulation Bill published in December 2020, remains unclear. This is due in part to the significance of the location of tech giants in Ireland and also because of potential conflicts between aspects of the proposed legislation and the EU Digital Services Act (DSA).

One of the biggest industry stories involved the sale of Denis O'Brien's Communicorp radio group to Germany's Bauer Media Audio. Communicorp owned two high-rating national radio stations, Today FM and Newstalk. This follows other international mergers and buy-outs, including Virgin Media merging with O2 (owned by Telefónica), Independent News and Media (INM) being sold to Mediahuis, and the takeover by the *Irish Times* of the *Irish Examiner*.

Colleen Murrell
Dublin City University

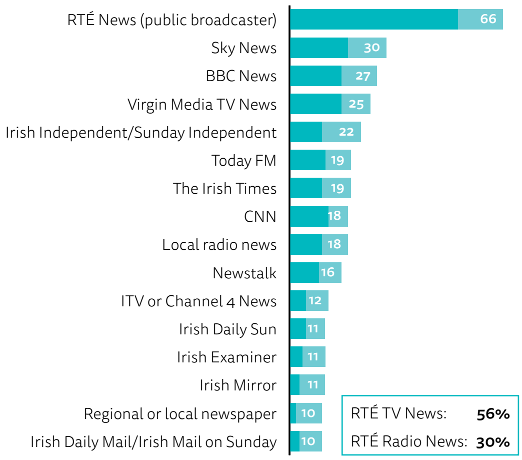
54 https://www.irishtimes.com/business/media-and-marketing/operating-profit-at-irish-times-group-up-46-to-3-82m-in-2019-1.4351742; https://www.independent.ie/business/inm-owner-mediahuis-reports-2020-profit-despite-impact-of-covid-40130082.html
55 https://www.linkedin.com/smart-links/AQErnRDjJhYcYA/01dd9770-4392-4662-b481-30fc3e507c6c
56 https://futureofmediacommission.ie/wp-content/uploads/768.-NewsBrands-Ireland-Submission.pdf

WEEKLY REACH OFFLINE AND ONLINE

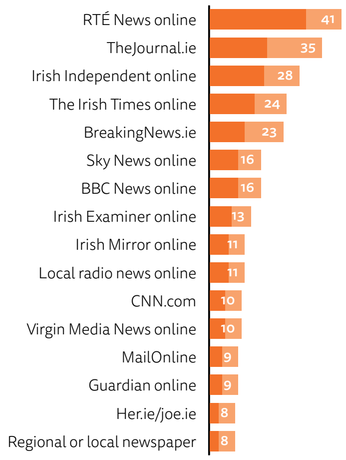
TOP BRANDS
% Weekly usage

- **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



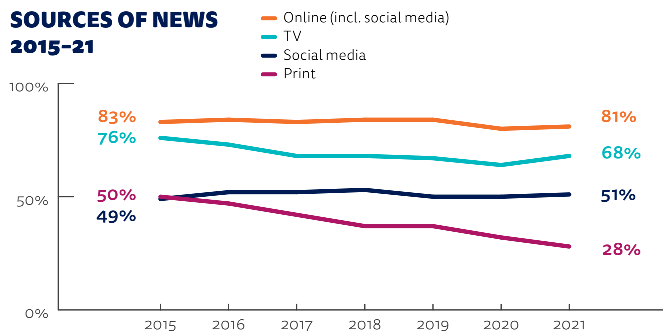
CHANGING MEDIA

Online remains the main source of news. While COVID-19 has accelerated the structural decline in print, it also seems to have fuelled a slight increase in TV and in the use of the smartphones, in line with trends seen elsewhere.

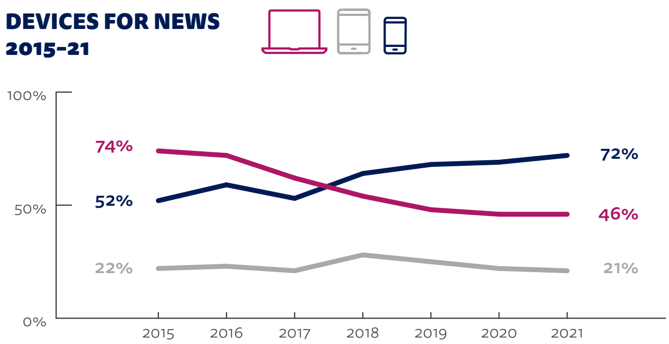
16% PAY pay for **ONLINE NEWS**

41% listen to **PODCASTS** in the last month

SOURCES OF NEWS 2015–21



DEVICES FOR NEWS 2015–21



TRUST

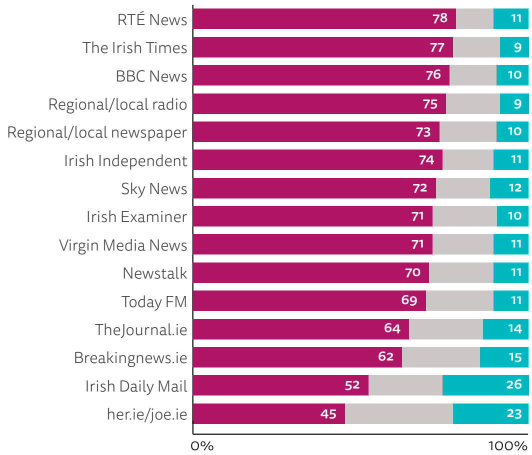
COVID-19 seems to have boosted trust over the past year (+5pp) for 'news overall' and for 'news I use' (+7pp). Public broadcaster RTÉ remains the most trusted brand (78%), closely followed by the *Irish Times* (77%), with Virgin Media News registering a seven percentage point increase on last year.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
53% (+5) =10/46	**59%**

News in search	*News in social*
34%	**19%**

BRAND TRUST SCORES



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

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

TOP SOCIAL MEDIA AND MESSAGING

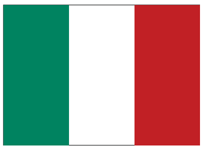
Rank	Brand	For News		For All
1	Facebook	35%	(-4)	64%
2	WhatsApp	23%	(+4)	69%
3	YouTube	18%	(-4)	61%

Rank	Brand	For News		For All
4	Twitter	13%	(-1)	25%
5	Instagram	12%	(+1)	38%
6	Facebook Messenger	11%	(+2)	45%

ITALY

STATISTICS

Population	**59m**
Internet penetration	**93%**



The COVID-19 pandemic has exacerbated some of the historical weaknesses of the Italian media sector, contributing to the decline of overall revenues, the fall in newspaper readership, and the lowering of the editorial standards adopted in news reporting. The consequences of the pandemic seem to have been less severe for major online platforms.

The Italian media environment has traditionally been characterised by a particularly strong television sector and a weak and declining newspaper sector. However, online advertising revenues overtook television advertising revenues for the first time in 2019, and now represent almost half (49%) of overall advertising revenues in the Italian media sector.[57]

Because of the severity of the COVID-19 pandemic, Italian media increased the space given to the news, and both television and online news outlets have seen a significant increase in audience reach. During the March and April 2020 outbreak, for example, Italian prime-time newscasts drew over 50% audience share, with an increase of approximately 5% on the previous year.[58]

However, the pandemic has also produced a sharp drop in advertising revenues, which are the main funding source for many Italian outlets, and exacerbated the decline in newspaper circulation. In the first nine months of 2020, total revenues for the Italian media sector fell by €780m, with considerable decreases observed in both the newspaper (-15%) and broadcasting sectors (-8%), while online advertising grew (+7%). As the Italian communication authority has pointed out, it is the major online platforms, which already generate approximately 80% of online advertising revenues in Italy, who are benefiting from this increase (+11%), while publishers and advertising agencies are experiencing further significant losses in this market too (-7%).[59]

Italian news media have responded in various ways. Several major news outlets have increased the number of ads on their websites, as well as their invasiveness. The trend towards pay models for online news is developing further and, although it has so far mainly been used by newspapers' websites, two digital-born news sites, Il Post.it and VareseNews, have recently introduced membership schemes. Even so, our data show that the proportion of people paying for online news is still low (13%). Government support for news organisations includes updating and extending the recent system of 50% tax credits on all corporate media advertising spend (including online) and postponing the ending of direct press subsidies, long criticised for the influence of political clientelism on the award process.

There were some major changes of ownership and leadership in the newspaper sector. The Agnelli-Elkann family, the largest shareholder of Fiat Chrysler Automobiles (FCA), bought the De Benedetti family's controlling stake in GEDI, one of the largest Italian publishing groups, which publishes the daily national newspapers *La Repubblica* and *La Stampa*, as well as several local newspapers and radio stations. A new editor-in-chief has been appointed for *La Repubblica*, and his attempts to adopt a more neutral editorial line for the traditionally centre-left leaning newspaper have been followed by the resignations of several high-profile journalists. Carlo De Benedetti, the former publisher of *La Repubblica*, launched a new newspaper in September 2020, *Domani*, also aimed at centre-left readers. In addition, some titles have closed, including the online-only Lettera43 and the local newspaper *Il Trentino*.

The online news market is still mainly dominated by legacy players. The websites with the widest online reach are those of the established commercial TV broadcasters (Mediaset's TgCom24 and SkyTg24), the main Italian news agency (ANSA), and the main newspapers (*La Repubblica*, *Il Corriere della Sera*, *Il Fatto Quotidiano*, and *Il Sole 24 Ore*). The online reach of the Italian public service broadcaster RAI is stable, but still far from its levels on TV and radio. Interestingly, the digital-born outlet Fanpage, which has a particularly strong social media presence, retains its position among the top Italian online news players that it has achieved in recent years. Good online results have also been achieved by local outlets like Quotidiano.net (8%), *La Stampa* (8%), *Il Messaggero* (8%), and digital-born outlets like HuffPost Italia (11%) and Il Post.it (8%).

On the editorial side, coverage of the COVID-19 pandemic has highlighted the shortage of specialist science journalists in Italy, as well as a tendency to focus news coverage on speculation and leaks about possible changes to Coronavirus-related restrictions, rather than on the actual decisions, together with sensationalist and often contradictory coverage of facts related to the pandemic and vaccines. This, together with the spread of disinformation, might have contributed to the audience's dissatisfaction and lack of trust in news.

Alessio Cornia
Dublin City University

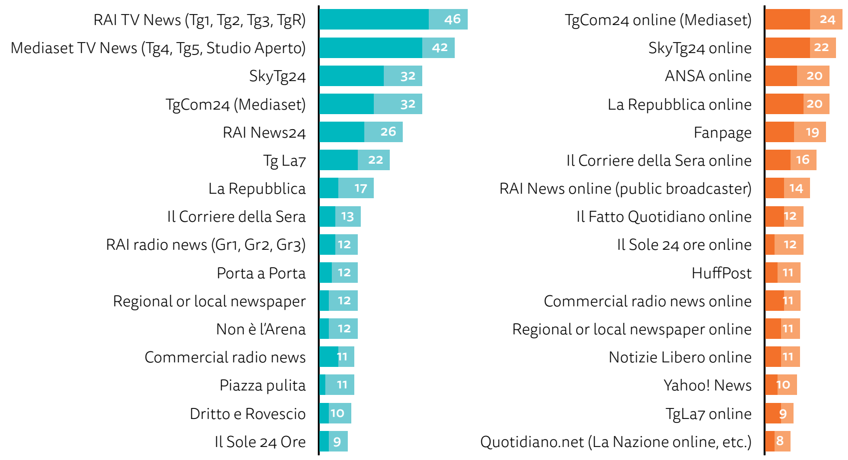
[57] https://www.agcom.it/relazioni-annuali
[58] https://www.agcom.it/relazioni-annuali
[59] https://www.agcom.it/osservatorio-sulle-comunicazioni

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

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



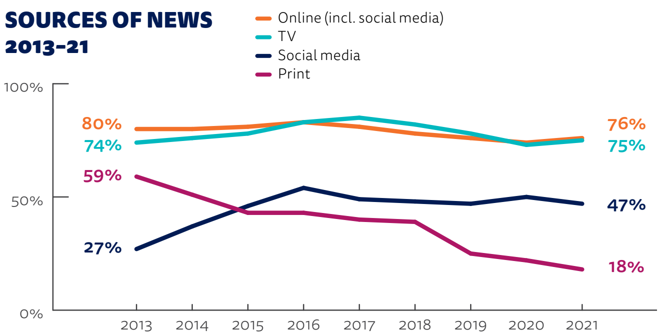
CHANGING MEDIA

Newspaper readership continues to fall steadily while television news viewership is more stable than in many other countries. The smartphone is the main device used to get online news.

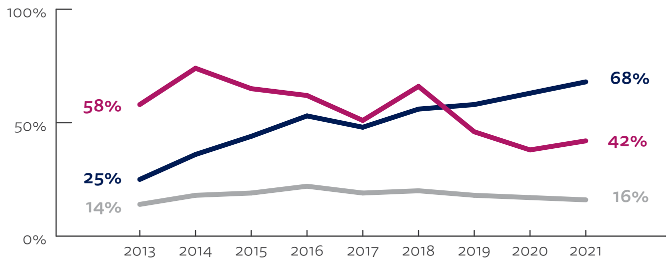
13% pay for **ONLINE NEWS**

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

SOURCES OF NEWS 2013–21



DEVICES FOR NEWS 2013–21*



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

TRUST

After an 11-percentage point fall in 2020, trust recovered all of that this year but is still relatively low. The most trusted brands are generally those that are known for lower levels of political partisanship. Least trusted are outlets with a pronounced partisan bias and the popular digital-born outlet Fanpage.

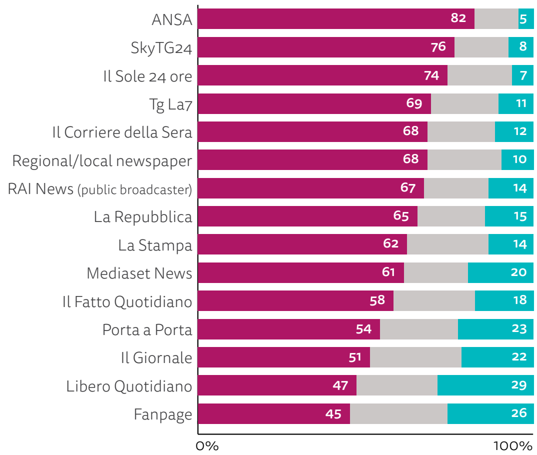
DIFFERENT TYPES OF TRUST

News overall	News I use
40% (+11) =26/46	47%

News in search	News in social
32%	20%

BRAND TRUST SCORES

Trust / Neither / Don't trust



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

40% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	50%	(-6)	74%
2	WhatsApp	30%	(+1)	84%
3	YouTube	20%	(-4)	67%
4	Instagram	15%	(-2)	48%
5	Twitter	8%	(-1)	18%
6	Telegram	7%	(+1)	28%

NETHERLANDS

STATISTICS

Population	**17m**
Internet penetration	**96%**

The Dutch media landscape is characterised by increased media concentration, strong growth of digital news use, and the appearance of alternative and sometimes strongly partisan sources.

2020 saw a drastic reduction in pluralism within the Dutch media landscape and the commercial market is now dominated by two Belgian publishers. DPG Media – owner of national daily titles such as *AD* and *De Volkskrant* along with a large number of regional papers – acquired Sanoma, the largest owner of magazines and the leading online news site Nu.nl. Mediahuis, owner of national newspapers *De Telegraaf* and *NRC*, expanded its grip on the regional market by acquiring NDC mediagroep. This unparalleled media concentration and ownership of several titles by consolidated groups raises questions about both the external and internal pluralism of the Dutch media.

Although both commercial and public TV and radio faced declining revenues from advertising, audiences were boosted by the crisis, with 6.9 million people on average watching news and current affairs programmes every evening compared to 6.1 million in 2019.[60] DPG Media and Mediahuis appear to have benefited most from the COVID-19 crisis. Both publishers saw increased revenues in 2020, driven by strong growth in digital subscriptions, with Mediahuis reporting digital subscriptions up by 47% in 2020.[61] In March 2021, their national title *NRC* reported a record-breaking 300,000 subscriptions, the highest since its creation in 1970. In our 2021 survey, 17% of our respondents reported paying for news online, a three percentage point increase on 2020 and up from 11% in 2019.

There was some debate within the media on the right way to cover the government's response to COVID-19. In particular, remarks in early March 2020 by *De Volkskrant*'s editor-in-chief, Pieter Klok, about how, given fear of the virus, news media should 'speak with one voice' and not 'magnify contradictions' led to accusations, especially in the alternative blogosphere, of mainstream media's supposed one-sidedness and retreat from its watchdog function.

The international English version of Dutch membership-based online news site De Correspondent closed on 1 January 2021. The founders said The Correspondent was no longer sustainable after an increase in membership cancellations in part due to COVID-19. Their critics, particularly among US members, blamed the closure on the failure to place a US office at the heart of the English-language edition. *Metro*, the last free newspaper in the Netherlands, ceased publication in 2020, citing the collapse of the advertising market due to COVID-19.

In March 2021 PublicSpaces – aimed at 'providing an alternative software ecosystem that serves the common interest and does not seek profit' – organised a conference designed to kickstart international cooperation and build a network of organisations and developers 'committed to fixing the internet'. Founded in 2018, PublicSpaces' initiative to reimagine 'the internet as a public space' is supported by, among others, the Ministry of Interior and the Dutch public broadcasting organisation NPO.

Several initiatives aimed at providing an alternative to what they call 'mainstream media' have attracted attention over the past year: De Andere Krant (The Other Paper/Side), Gezond Verstand (Common Sense), and Café Weltschmerz. These publications often question (scientific) consensus and government policy related to issues including COVID-19, 5G, and climate change. Other news media, politicians, and experts have denounced them for spreading disinformation and conspiracy theories. In October 2020, bookshop chains Bruna and AKO were criticised for selling print copies of *Gezond Verstand*. Minister of the Interior Kajsa Ollongren argued that bookshops should decide what they sold, but suggested placing *Gezond Verstand* next to the *Fabeltjeskrant* (the Fables Newspaper), a reference to an old children's TV show in which a puppet owl read fables. YouTube deleted two of Café Weltschermz's videos suggesting the anti-malaria drug hydroxychloroquine provided protection against COVID-19. A court later ruled the removal of these videos was justified.

Even though the Netherlands ranks fourth for trust overall, violence against journalists is becoming increasingly common. In January 2021 alone, journalists reported 39 cases of intimidation, threats, and assault to PersVeilig, which runs a reporting website, hotline, and helpdesk for journalists under attack. That number represents almost a third of the 141 reports received for the whole of 2020.

Irene Costera Meijer and
Tim Groot Kormelink
Vrije Universiteit Amsterdam

[60] https://kijkonderzoek.nl/images/Persberichten/2020/Jaarpersberichten/210107_Factsheet_coronacrisis_-_kerncijfers_TV_2020.pdf
[61] https://www.mediahuislimburg.nl/actueel/2020-kanteljaar-in-de-digitale-transformatie-van-mediahuis/#:~:text=Op%20de%20Nederlandse%20markt%20steeg,met%20maar%20liefst%20%2B16%25

WEEKLY REACH OFFLINE AND ONLINE*

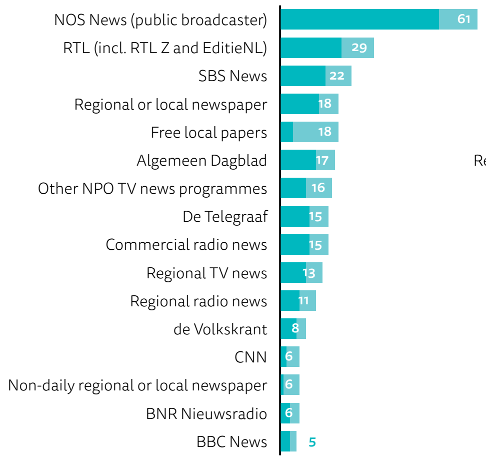
TOP BRANDS

% Weekly usage

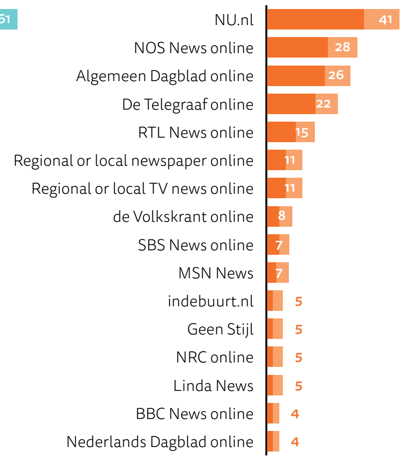
- **Weekly use** TV, radio & print
- **More than 3 days per week** TV, radio & print
- **Weekly use** online brands
- **More than 3 days per week** online brands

* Due to a scripting error in the original survey, brand reach data in the Netherlands comes from a separate re-poll conducted from 26 March to 6 April 2021 (N=1504).

TV, RADIO AND PRINT



ONLINE



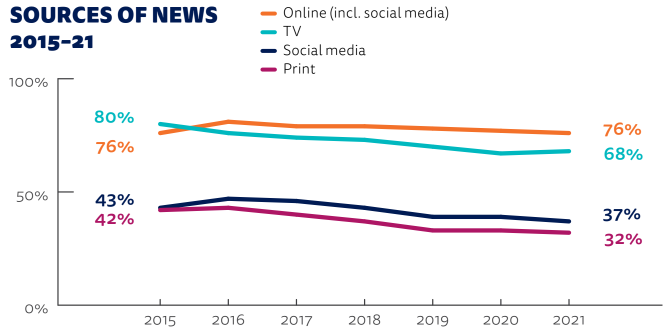
CHANGING MEDIA

News consumption went through the roof during the first months of the COVID-19 crisis, but eventually usage returned to 2019 levels. Hyperlocal news site indebuurt (In the Neighbourhood) became a relatively popular news source reaching 5% of the population.

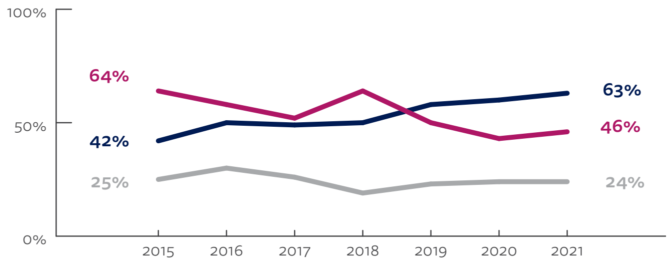
17% pay for **ONLINE NEWS**

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

SOURCES OF NEWS 2015–21



DEVICES FOR NEWS 2015–21*



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

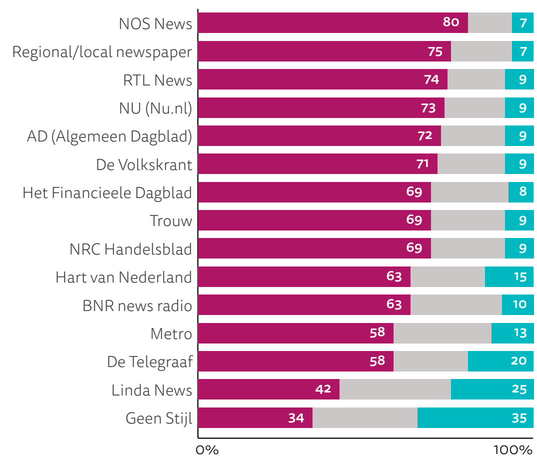
TRUST

Trust in news is high at 59%, but lower amongst the young (18–34). People who strongly distrust the news are protesting online and in demonstrations. The most trusted news source, NOS, removed its logo after its vehicles were targeted by protesters against COVID-19 or CO2 reduction measures.

DIFFERENT TYPES OF TRUST

News overall	News I use
59% (+7) =4/46	65%
News in search	**News in social**
31%	20%

BRAND TRUST SCORES



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

21% SHARE NEWS via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

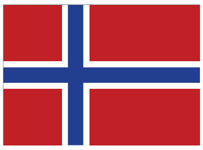
Rank	Brand	For News		For All
1	Facebook	26%	(-2)	59%
2	WhatsApp	22%	(+2)	73%
3	YouTube	15%	(-)	52%

Rank	Brand	For News		For All
4	Instagram	10%	(+1)	34%
5	Twitter	8%	(+1)	16%
6	LinkedIn	5%	(+1)	20%

NORWAY

STATISTICS

Population	5.4m
Internet penetration	98%



The Norwegian media landscape mixes strong national publishers and public service media, with a reputation for innovation in content and business models. A year into the pandemic, Norwegians report increased trust in, and willingness to pay for, news.

Norway remains the country with the highest number of consumers (45%) willing to pay for online news, up three percentage points since last year (and 11pp since 2019), with growth skewed towards the well-off. Given the strong tradition of reading print newspapers, the transition to digital subscriptions has been promoted with hybrid solutions that typically bundle paper and digital content. This, and the absence of freesheets, explains why Norway remains the leading country in the survey in paying for online news.

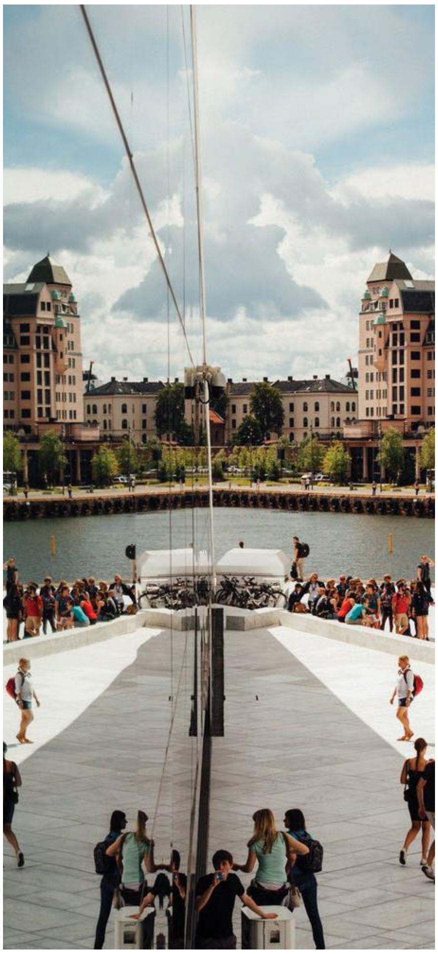
New audiences paying for news was not the only positive sign for the media business in 2020: Norwegian news providers experienced an increase in online users, and industry sources suggest the decrease in offline audiences also slowed down. While the pandemic shook the business, particularly with advertising spending grinding to a halt during early spring 2020, threatening layoffs, major players reported positive figures coming out of the pandemic's first year. Schibsted, for instance, which owns the largest quality newspaper *Aftenposten*, numerous regional newspapers, as well as the popular tabloid *VG*, reported revenue growth and cost savings for their news media with a profit at year end of 10% (EBITDA). Amedia, which owns 80 local newspapers as well as the popular online paper Nettavisen, reported very similar levels (14.7%) and managed to keep all their journalists employed through the year.

Faced with the consequences of lockdown measures, the government poured public funding into general industry support packages, and also instigated a special €30m pandemic press support scheme. Longstanding press subsidies still help support the plethora of local newspapers and a handful of national ones, and a relatively new initiative to support innovation adds to the existing scheme, making it comparatively wide-ranging and generous.

Public service broadcaster NRK retained its central position in the news landscape, as the most used news source offline, and the second most used one online (where weekly reach increased by 8pp) as well as the most trusted Norwegian news brand. While NRK retains a broad remit across platforms and seems to have strong public legitimacy, criticism of its online activities in particular by commercial providers continues, and the Ministry of Culture has launched a review which is due to report in 2021.

There was a continued focus in the news on #MeToo in 2020 and an increased awareness and debate on racism and discrimination in Norway. The coverage followed international events, such as the murder of George Floyd in the USA and the Black Lives Matter movement, which heightened discussions of representation in media and the dominance of white (male) people in leading news positions. The NRK also broadcast detailed coverage of a 20-year-old racially motivated murder of a 15-year-old boy which triggered new discussion about racism. We continue to see the interlinkages between social media and politics, with topics raised in social media quickly finding their way into the news.

Almost four out of ten Norwegians (37%) have used podcasts during the last month, a slight increase on last year. Podcasts reach the younger age groups particularly, with close to two-thirds (59%) of those under 35 having used podcasts, compared to only 29% of those over 35. Several of the major newspapers now publish a range of podcasts, especially focused on news commentary and weekly summaries of current events. There was a strengthened professionalisation in 2020 of this previously bottom-up medium, with more



launches, a continued strong presence from the NRK, and a degree of attention for popular 'podcast stars' previously restricted to television entertainment personalities.

In Norway, as elsewhere, the pandemic focused public attention on misinformation spread through online media. In our survey we see that 45% are concerned about what is fake and real on the internet when thinking about online news. Since 2019, this number has risen three percentage points each year, with no apparent bump following the pandemic. Among the topics on which Norwegians say they have come across false or misleading information, Coronavirus is mentioned most frequently (30%), but it is closely followed by climate change/environment and politics. Specifically on the pandemic, Norwegian respondents say they fear false and misleading information first and foremost from activists, and see Facebook as a major source for this.

Janne Bjørgan and **Hallvard Moe**
University of Bergen

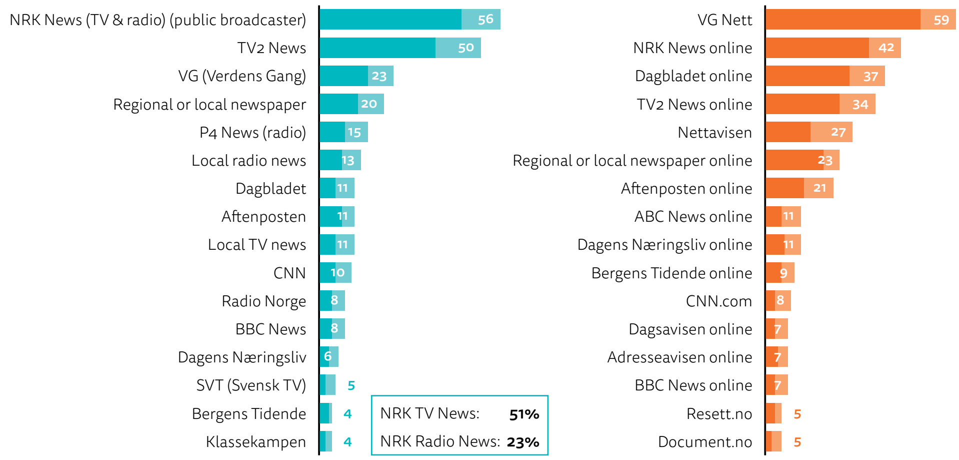
WEEKLY REACH OFFLINE AND ONLINE

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**



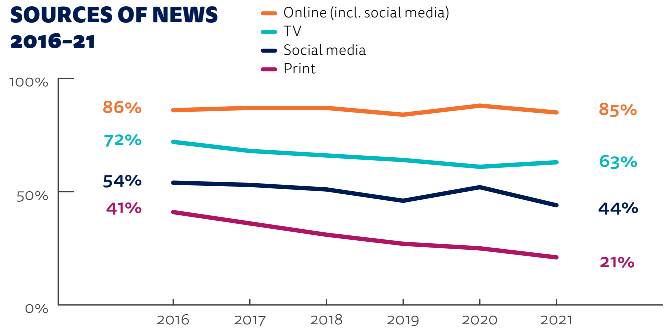
CHANGING MEDIA

Whereas many other countries report a rise in TV consumption, there is only a slight increase (+2pp) in Norway. Social media are declining as a source of news, with Facebook's continued fall particularly pronounced (-14pp since 2019).

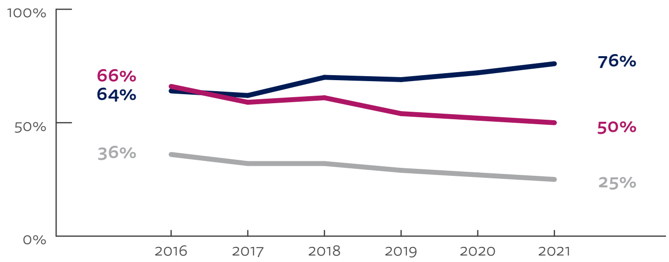
45% pay for **ONLINE NEWS**

37% listen to **PODCASTS** in the last month

SOURCES OF NEWS 2016–21



DEVICES FOR NEWS 2016–21



TRUST

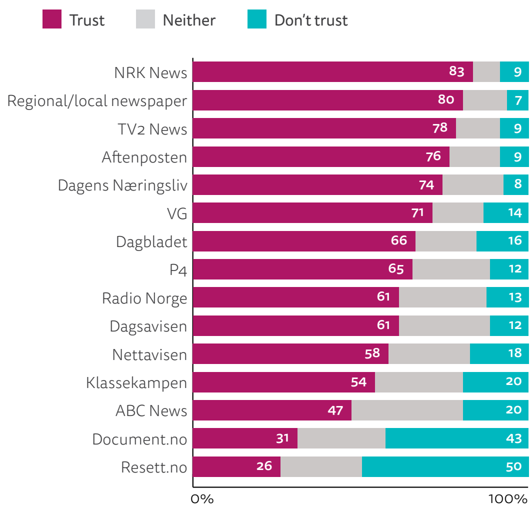
Trust in news overall is up significantly, with increases for NRK and other national and local news brands. VG, which was hit by a 2019 ethics scandal, saw the biggest jump. 'Alternative' news sites Resett and Document remain trusted by a small, but declining, minority, and are seeing increased levels of mistrust.

DIFFERENT TYPES OF TRUST

News overall	News I use
57% (+12) 6/46	**67%**

News in search	News in social
28%	**18%**

BRAND TRUST SCORES



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

23% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	31%	(-6)	75%
2	Facebook Messenger	12%	(-1)	60%
3	YouTube	12%	(-1)	57%
4	Snapchat	9%	(-1)	52%
5	Instagram	7%	(-1)	48%
6	Twitter	7%	(-)	18%

POLAND

STATISTICS

Population	38m
Internet penetration	78%

COVID-19 affected news audiences and hit media revenues in Poland as elsewhere. But in the deeply polarised Polish media landscape, the pandemic was overshadowed by mounting political pressures in a turbulent election year. Independent newsrooms saw some journalists arrested, assaulted, and fined. And the state started to extend its control over private media.

The ruling party pursued its radical agenda in 2020 with the pandemic providing further impetus for its moves to redraw Poland's media landscape. In November 2020 the state-owned oil company, Orlen, bought Ruch, the biggest newspaper distributor. Later Orlen bought the largest regional daily newspaper group, Polska Press, from its German proprietors, making the government owner of a major media outlet for the first time since the fall of Communism. Publishers were understandably concerned at a state-owned firm controlling distribution and becoming a direct competitor. Orlen had already created an advertising agency, Sigma Bis (jointly with state-controlled insurer PZU), that is likely to allocate advertising spend by state-owned companies.

Several pro-government titles already benefit from significant amounts of state advertising, according to research by Tadeusz Kowalski at Warsaw University. For the weekly magazine *Sieci* this amounted to almost a third (31%) of 2020 advertising revenues and for the right-wing daily *Gazeta Polska Codziennie* it was over half (53%).[62] Meanwhile, plans for an advertising tax added to pressure on the industry overall. Independent Polish media denounced it as an attempt to undermine press freedom. Commercial TV channels and radio stations went off air for 24 hours on 10 February 2021 in protest – as did a number of web portals.[63]

As an election year, 2020 saw an intensification of conflict between the ruling coalition and its critics. Public service broadcasting, which depends increasingly on the annual award of state subsidies to top up declining licence income, as expected, acted as a propaganda vehicle for government.[64] But government control can occasionally backfire in surprising ways. When public radio's channel Trojka removed a song criticising the ruling party leader from their weekly chart in May 2020, some prominent journalists resigned in protest. Thanks to crowdfunding campaigns they launched two new independent stations online. The incident also hit Trojka's audience share, which fell to just 1.9% in the quarter ending February 2021, compared to 5.1% for the same period a year before.

Physical attacks on journalists took place around two major demonstrations. The first in October 2020 was a massive protest against a controversial ruling by the Polish Constitutional Court restricting abortions. At least three reporters covering it, including one from the *Gazeta Wyborcza*, were injured following assaults by masked men. Other journalists faced charges or fines after covering protests by the All-Poland Women's Strike movement, which played a key role in the October demonstrations. And then reporters from *Newsweek Polska* were beaten up by police while covering the far-right Independence Day March on 11 November, despite wearing 'Press' jackets.

The courts have also been used by those affiliated with the ruling party to suppress independent media, creating a chilling effect. Since 2015 more than 60 defamation lawsuits have been filed against *Gazeta Wyborcza* and at least 40 against Ringier Axel Springer Polska, owners of *Newsweek Polska* and Onet.pl, the leading online news site.

Foreign ownership has on occasions been an important bulwark of independence in a difficult environment for local media but proposals for a 'Repolonisation law' would limit this. Both the top rating news broadcaster, TVN24, and top online site, Onet.pl, remain foreign owned, by Discovery Communications and Ringier Axel Springer Polska respectively. But in addition to the Polska Press sale to Orlen, Bauer Media shut seven magazines and sold Interia.pl, the fourth most used weekly online news source in our survey, to Poland's biggest media conglomerate, Cyfrowy Polsat.

The pandemic added to financial pressures, forcing publishers and broadcasters to cut staff and salaries. The first title to fall victim was in March 2020 when *Wprost* weekly closed its print edition, a casualty of the closure of newsstands in lockdown. Six months of temporary government support helped others but journalist layoffs followed when it ended.

Other companies saw subscription spikes or accelerated digital development. TVN successfully switched its video-on-demand (VOD) business from advertising to a subscription model and its news arm, TVN24, introduced a premium section behind the registration wall, thought to be a step towards paid content. *Gazeta Wyborcza* daily added a premium offer, with interviews with experts and politicians available live for subscribers, a behind-the-scenes newsletter, and premium podcasts.

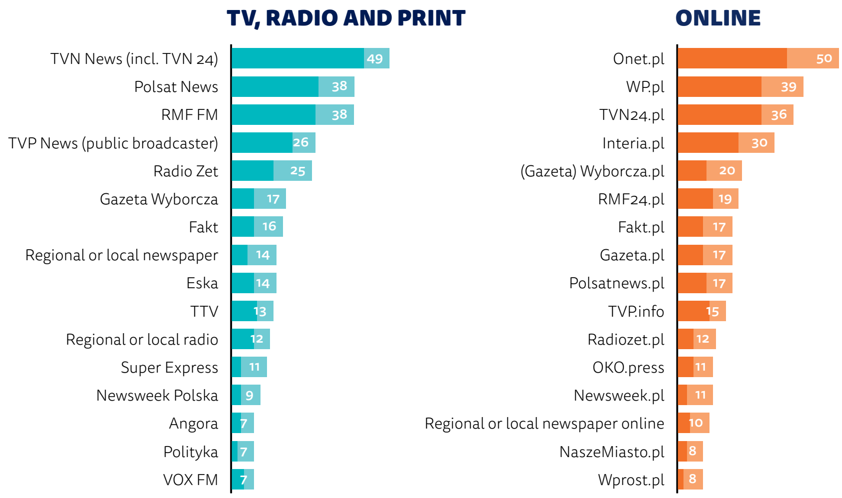
Vadim Makarenko
Journalist at Gazeta Wyborcza and former Reuters Institute Journalist Fellow

[62] https://www.researchgate.net/publication/349410539_Report_Advertising_expenditures_of_state-owned_companies_Poland_2015-2020
[63] https://www.theguardian.com/world/2021/feb/10/polish-media-hold-blackout-in-protest-at-tax-threat
[64] https://www.osce.org/files/f/documents/4/9/455728.pdf

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

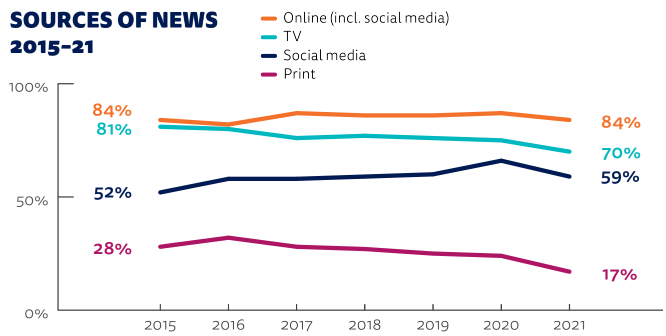
- **Weekly use** TV, radio & print
- **More than 3 days per week** TV, radio & print
- **Weekly use** online brands
- **More than 3 days per week** online brands

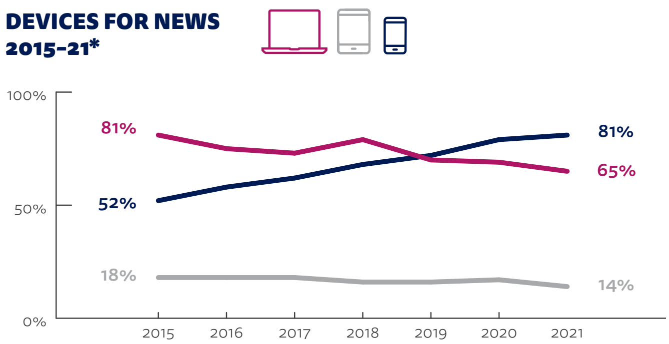


CHANGING MEDIA

Interest in all news sources declined this year, with television news showing none of the growth under lockdown seen elsewhere. Online news portals Onet and WP remain the top destinations online.

18% pay for **ONLINE NEWS**





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

TRUST

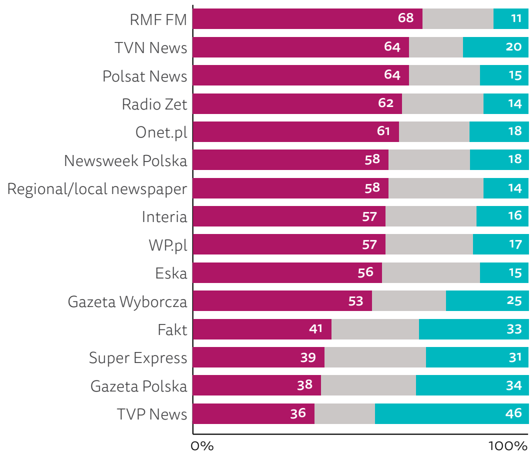
Trust in news overall recovered the three percentage point loss from last year. The remaining independent media tend to score better on trust, while the state-controlled public broadcaster TVP again comes bottom of the trust ranking, with more distrusting (46%) than trusting it (36%).

DIFFERENT TYPES OF TRUST

News overall	News I use
48% (+3) 16/46	**55%**

News in search	News in social
46%	**37%**

BRAND TRUST SCORES



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

39% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

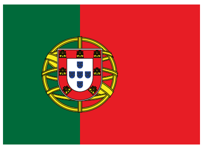
Rank	Brand	For News	For All
1	Facebook	55% (-10)	72%
2	YouTube	35% (-1)	72%
3	Facebook Messenger	25% (+1)	63%

Rank	Brand	For News	For All
4	Instagram	13% (+1)	35%
5	WhatsApp	12% (+2)	35%
6	Twitter	9% (-2)	17%

PORTUGAL

STATISTICS

Population	10m
Internet penetration	78%



In a country that repeatedly ranks high in terms of trust in news, digital business models are no longer just about revenue diversification but have become critical to survival. And in 2020 concerns around COVID-19 appear to have played a role in making more people willing to pay for digital content.

The impact of COVID-19 added to the longstanding structural problems of Portuguese news companies of falling print and advertising revenues and the failure to replace these with new digital business models.

Analysts estimate that COVID-19 hit advertising profits by 40–50% in 2020 and the pandemic impacted on all aspects of the industry. Paid print circulation fell by nearly 20% in Q1 and our data shows print as a source down six percentage points on last year. Television audiences increased initially, thanks to concern over COVID-19 and more people being at home. But the radio sector was hit by the collapse in commuters listening, which deprived brands of their most profitable advertising slots. Job losses followed, with a significant proportion of Portuguese journalists either laid off or experiencing salary cuts in 2020.[65] One company, the Global Media Group, owner of brands such as *Diário de Notícias, Jornal de Notícias*, and TSF radio, underwent a radical restructure in April 2020 with 538 temporary layoffs.

The brighter news is that industry figures show an increase in the numbers paying for online news, albeit from a low base. The COVID-19 bump in digital news subscriptions was highlighted by the APCT[66] (the industry statistics body), by Digital News Report survey data,[67] and by research centre OberCom. *Expresso* reported digital paid circulation up by 53% in 2020, while *Público* increased by 97%. However, news brands have generally not increased digital revenues fast enough to make up for the significant losses in paid print circulation, on which most rely.

One unusual form of support came from Santa Casa da Misericórdia, the social institution that among other things manages the Euromillions lottery, which launched an initiative to fund 20,000 free digital news subscriptions for eight media outlets (seven general and one sports brand). Brands used these in different ways: the weekly magazine *Visão* gave some of these free subscriptions to older citizens attending the University of the 3rd Age while *Público* targeted unemployed people.

Another – albeit controversial – response was the creation by the Portuguese government in Spring 2020 of a COVID-19 emergency financial media support scheme – based on compensating for the estimated revenue loss from cancelled corporate advertising. €11.25m was awarded to national media brands and €3.75m to local and regional outlets. Debate focused on both the approach and the amounts awarded to each brand.

A rise in COVID-19 related disinformation has concerned policymakers and news organisations. OberCom[68] and MediaLab ISCTE-IUL[69] have reported how disinformation has been spread in private messaging platforms such as WhatsApp, using social media profiles that mimic genuine news sources, and reach wide audiences on social media. Several news outlets lifted paywalls for key COVID-19 related content early on and for the first time fact-checking outlets took centre stage in daily news. Polígrafo and Observador, the two main national fact-checkers, feature in prime-time news slots, on the SIC and TVI TV channels.

Despite the pandemic, 2020 saw some important strategic developments. The SIC private television broadcaster launched the first Portuguese private streaming service OPTO, while public broadcaster, RTP, invested considerable resources in expanding its existing free streaming service, RTP Play. *Diário de Notícias*, one of Portugal's oldest newspapers, returned to a daily print edition, after having abandoned that in June 2018 for a weekly print edition alongside a daily digital-only presence.

Smaller independent brands such as Fumaça, Mapa, Shifter, Divergente, or Interruptor continue to promote innovation both in journalistic practices and business models. They generally aim to build long-term sustainability through a much closer and intimate relationship with their audiences, with start-up funds often coming from a mix of crowdfunding and foundations. The regional media landscape is also changing, with new projects developing and existing digital brands, such as Medio Tejo and Sul Informação, growing steadily.

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

65 https://www.ics.ulisboa.pt/docs/covid19/RelatorioCOVID19Jornalismo.pdf
66 http://www.apct.pt/
67 Digital News Report survey data also show a substantial bump in digital subscriptions this year. Please note, however, that the 17% figure is likely to overstate the total number of subscribers, as respondents mention many types of digital payments for news content across online, mobile phones, TV, and radio – not just publisher subscriptions.
68 https://obercom.pt/pandemia-e-consumos-mediaticos/
69 https://medialab.iscte-iul.pt/information-and-misinformation-coronavirus-in-portugal/

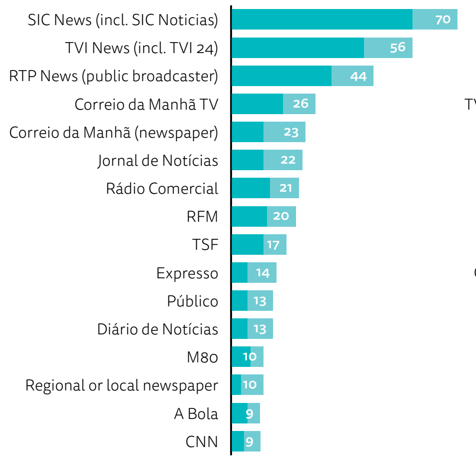
WEEKLY REACH OFFLINE AND ONLINE

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



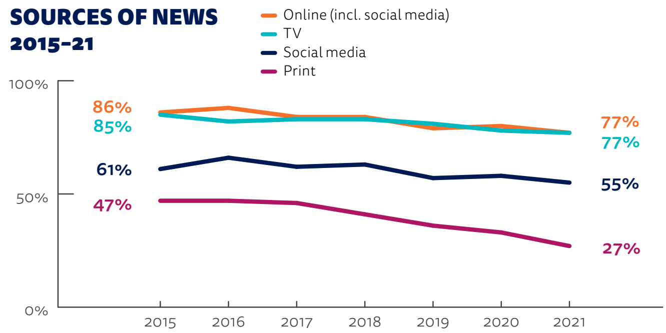
ONLINE

CHANGING MEDIA

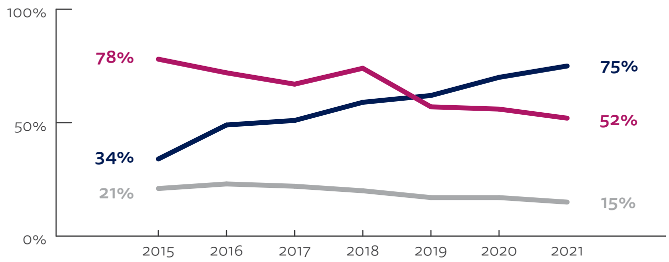
COVID-19 accelerated the existing downward trends in print, while TV and online (including social media) showed little change compared with last year. The smartphone became the pre-eminent form of access, despite reduced mobility.

17% pay for **ONLINE NEWS**

SOURCES OF NEWS 2015–21



DEVICES FOR NEWS 2015–21*



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

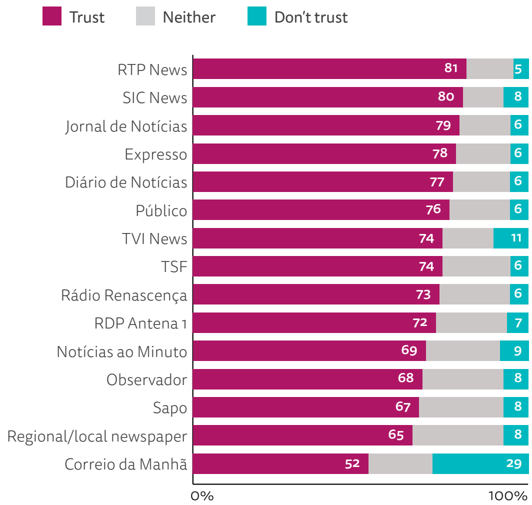
TRUST

High trust in news remains a feature of Portugal's media landscape, even in a context where Coronavirus-related disinformation steadily increased, particularly in social media. Public broadcaster RTP remains the most trusted news brand, while popular news brand *Correio da Manhã*, which operates across print, TV, and online, is less well trusted.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
61% (+5) =2/46	**62%**
News in search	***News in social***
45%	**27%**

BRAND TRUST SCORES



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

46% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All	Rank	Brand	For News		For All
1	Facebook	48%	(-2)	73%	4	Facebook Messenger	14%	(-2)	55%
2	WhatsApp	21%	(+3)	64%	5	Instagram	14%	(-)	48%
3	YouTube	20%	(-4)	66%	6	Twitter	11%	(+3)	20%

ROMANIA

STATISTICS

Population	**19m**
Internet penetration	**74%**

Rarely, in the three decades since the fall of Communism, have Romanians been so hungry for up-to-date information to help them take the right decisions, and journalists so ill equipped to provide accurate information, with the necessary context and explanation. Yet, during this COVID-19 ravaged year, trust in media has actually increased slightly.

The level of interest in news was so high during the pandemic that our 2021 data reveal the first important change in the last five years in the top brands online. Digi24, the online version of the Digi24 continuous news channel, became the most used brand, thus overtaking the news site of ProTV, the linear TV channel that leads our offline brand list. Digi24's success appears to be due to the public's thirst for immediate updates on COVID-19 news. According to data from the Joint Industry Committee for Print and Internet (BRAT) Digi24's traffic spiked at times of increased concern about COVID-19 or the announcement of new measures.

While ProTV and Digi24 lead in terms of both consumption and trust, public service radio and TV are also among the top five most trusted media brands. All five – including the radio news channel Europa FM – generally tried to maintain a moderate tone and balanced coverage of the crisis, even at times of breaking news.

Nevertheless, much Romanian news coverage is sensationalist, with outrage the stock in trade for many commentators. By 14 March 2020, when President Klaus Iohannis announced the state of emergency and lockdown, reports of the 'killer virus' had been leading daily news bulletins for weeks. The level of anxiety and the public pressure were so great that members of Parliament voted for a government they had dismissed through a censure motion some five weeks earlier. Politicians from all parties accepted the medical arguments for restrictions to fight Coronavirus, allowing for an easier early implementation of lockdown rules.

By spring 2021, even as cases rose, the mood changed and demonstrations against government measures started. But in January–February 2021, when the Digital News Report survey took place, there was an extraordinarily high degree of consensus around COVID-19 containment measures. This may help explain the increased level of trust seen for most media brands surveyed.

Journalists, whether stuck at home or in their newsrooms, were wholly reliant on information about the pandemic released by a mysterious Group of Strategic Communication, whose membership was kept secret for over a year. During the two months allowed by law for the initial state of emergency, the Group was empowered to block media outlets spreading conspiracy theories or obvious untruths. The closure of several sites met with protests from the Organisation for Security and Cooperation in Europe (OSCE) and of the People's Advocate (a Romanian Ombudsman), asking the government to produce clear criteria for limitations on freedom of speech during the lockdown, particularly since there was no right of appeal or redress. Later, when the state of emergency was lifted, closed sites were allowed to reopen. The actions of the Group of Strategic Communication appear to have had a signalling effect – suggesting unsanctioned newsrooms were telling the truth and should be trusted.

The government also helped with the creation in May 2020 of a €40m fund intended to make up for the lockdown losses incurred by commercial media. Funds were disbursed as payments for advertising the state-run COVID-19 prevention campaign. Payments were based on audience size, which meant that some worried about rewarding sensational and click-bait-based journalism. With local and parliamentary elections scheduled for the second half of 2020, the government was also accused of trying to buy support from news organisations.[70] Several local media organisations say, however, that as the pandemic developed, public money was the only source of income for many newsrooms.

Limited access to information, closed sites and newsrooms dependent on government subsidies – all these would provide cause for concern in any democracy. Fortunately, the public showed a lively interest in data visualisation and investigative pieces. Whistle-blowers inside the medical system, trusted local and national newsrooms, and breaking news journalists and civic activists pressured national and local administrations for correct, in-depth data and explanations. The very first investigative piece broke on Facebook,[71] one week into the lockdown, and was shared more than 5,000 times. All these factors kept institutions in power accountable.

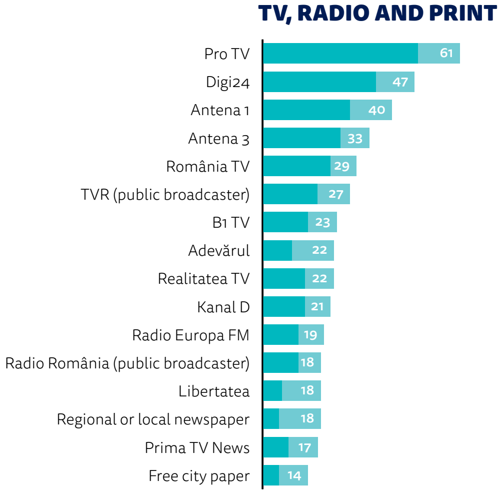
Raluca-Nicoleta Radu
University of Bucharest

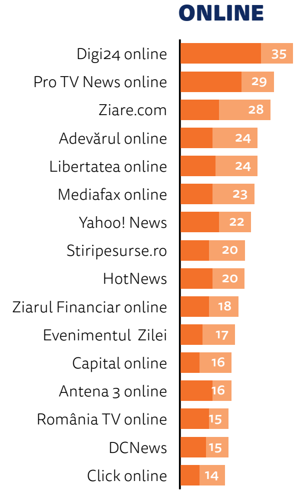
70 Tăpălagă, D. 20 June 2020, 'What you are Never Going to Find Out from the Media Financed by the Orban Cabinet', https://www.g4media.ro/ce-nu-veti-auzi-niciodata-de-la-presa-finantata-de-guvernul-orban-cum-au-capitalizat-liberalii-moguli-care-nu-aveau-nevoie-sau-nu-merita-ajutor.html.
71 https://www.facebook.com/victor.g.ilie/posts/3302943889739618

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

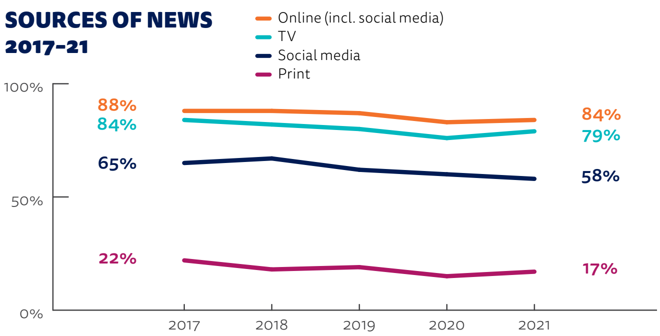


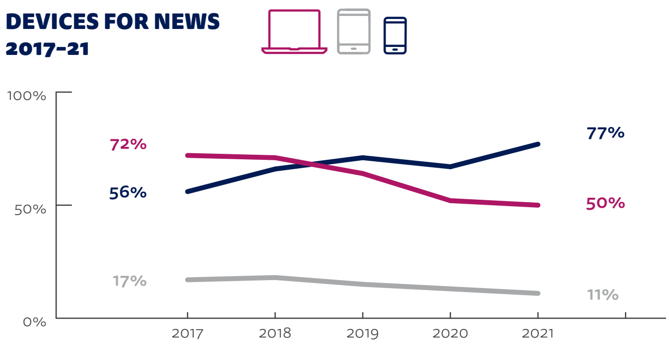


CHANGING MEDIA

Romanian audiences rely primarily on TV and online as news sources. Our survey, conducted in January–February 2021, captures this well and coincided with the second phase of vaccination involving large numbers and a consequent intense period for news consumption.

20% PAY
pay for
ONLINE NEWS



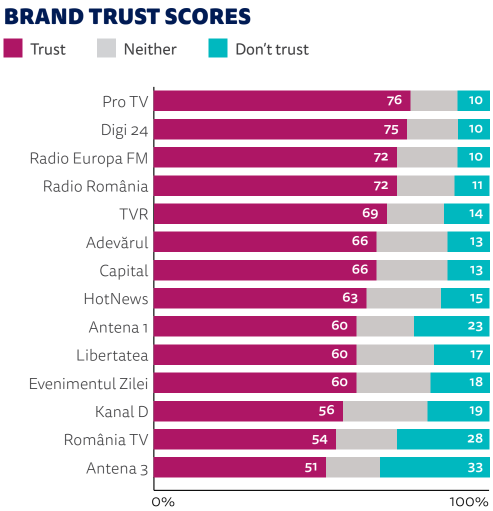


TRUST

Trust in media increased slightly, while trust in social media decreased. The most trusted brands try to offer a balanced picture while many other brands have a reputation for sensationalist or partisan coverage. Seven out of ten respondents declare they used more than seven different sources per week, online and offline (a constant in the last five years).

DIFFERENT TYPES OF TRUST

News overall	News I use
42% (+4) =22/46	46%
News in search	**News in social**
41%	29%



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

33%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	60%	(-7)	79%
2	YouTube	38%	(+6)	77%
3	WhatsApp	28%	(+7)	70%
4	Facebook Messenger	19%	(-1)	56%
5	Instagram	13%	(+1)	40%
6	Twitter	9%	(+3)	19%

SLOVAKIA

STATISTICS

Population	**5.4m**
Internet penetration	**85%**

Commercial TV stations and digital-born news portals remain the dominant news sources for Slovaks, whose media use has been influenced by three key events in 2020: the Coronavirus pandemic, a change in government, and the ongoing trial of those suspected of involvement in the 2018 murder of investigative journalist Ján Kuciak. During the year pressure grew on the Director General of the public service broadcaster, while many media outlets were accused of bias by the new Prime Minister.

2020 saw increased public interest in information provided by audiovisual and internet media, driven by the pandemic. Rolling news channel TA3 saw its viewership rise significantly. Aktuality.sk, a paywall-free, digital-born news website associated with murdered investigative reporter Ján Kuciak, remains the most widely read online brand.

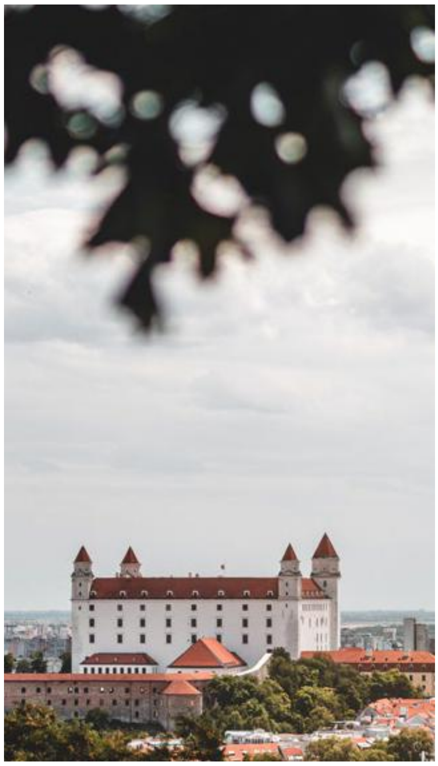
The centre-right coalition government which took office on 21 March 2020 was immediately faced with a public health crisis. Its communication policy on the pandemic has been criticised as chaotic in a country which won praise for its successful containment of the first wave with a pre-emptive hard lockdown, and pioneered mass testing in the autumn. However, by winter the country succumbed to a catastrophic second wave, during which Slovakia briefly had the world's highest per capita death rate from Coronavirus.

Sections of the media had operated in a state of mutual hostility with the previous Smer-Social Democracy-led government, but politicians' attacks on the media for alleged bias only briefly subsided post-election. Gone are media boycotts and bans from press conferences, but Prime Minister (until 1 April 2021) Igor Matovič denounced the press in striking language. In September he wrote on Facebook that the main media organisations are 'in the hands of oligarchs' paying journalists to 'carpet-bomb' him and his party. Matovič had proposed a state fund to support investigative journalism, an idea most news organisations rejected: state 'meddling' in journalism is viewed sceptically given Slovakia's history of political interference. Our data imply that the idea was unlikely to be welcomed by the public: just 26% of respondents supported government subsidies for commercial news organisations.

The government proposed several other media-related policy initiatives, none of which, however, has yet been implemented. A policy document on combating disinformation was undergoing interdepartmental review in early 2021: the proposals envisage cooperation with the media and NGOs and a public alerting system. Another law is planned to strengthen protection of journalists and their sources. Controversial plans for a monthly government newspaper with a distribution of up to two million were reported to be ready for public tender in March 2021.

Public service broadcaster RTVS had a difficult year, with Director General Jaroslav Rezník facing accusations of political favouritism and financial mismanagement. The broadcaster was criticised for reacting slowly to the first wave of the pandemic and underestimating its newsworthiness. Commercial rival Markíza, which has a higher audience share than RTVS, devoted more of its news programming to Coronavirus and was first to introduce a regular prime-time slot on the pandemic. This became the preferred outlet for politicians and experts. However, RTVS (along with TA3) seems to have won the battle of trust according to this year's survey.

Legislation is planned to establish an independent ethics committee at RTVS, justified by the need to expand public oversight from programme content to relations between management and staff.



As reported in the 2019 *Digital News Report*, complaints that management fails to protect journalists from political pressure led to several resignations. RTVS management, by contrast, views the proposal as a threat to its independence from political influence.

Slovaks are highly exposed to Coronavirus-related fake news, with 64% declaring they had encountered misinformation concerning COVID-19. They cited concern about politicians and political parties as a source of false or misleading information (37%) followed by ordinary members of the public (18%). Only 12% believed the news media spread misinformation on COVID-19. Politicians, including far-right leader Marián Kotleba and former PM Robert Fico, used social and mass media to challenge measures aimed at containing the spread of the virus and the vaccination campaign.

Newspaper sales continue to decline, but the pandemic did not really accelerate the trend. Some brands increased their digital subscriptions, though not by enough to make up for the fall in advertising receipts. Major publishers expected the impact to be more severe than it was, but lack of funds has meant existential issues for some left-wing, conservative, or local media outlets not under the wing of large corporations.

Andrea Chlebcová Hečková
Constantine the Philosopher University, Nitra
and **Simon Smith**
Charles University, Prague

[72] https://www.median.sk/pdf/MML2020/MMLOmnibus_2020_IV_Najobjektivnejsie_TV_spravodajstvo.pdf

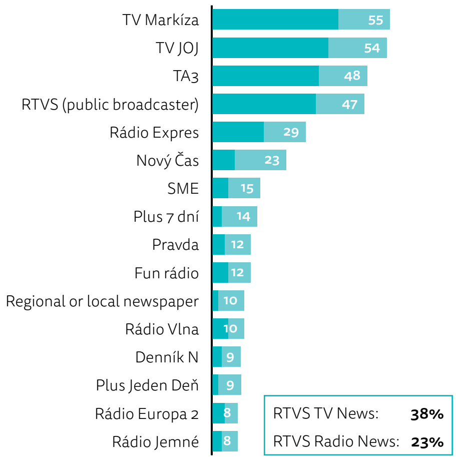
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

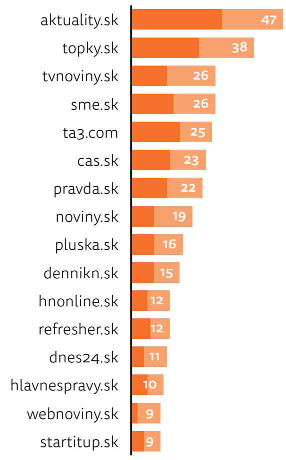
% Weekly usage

- 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

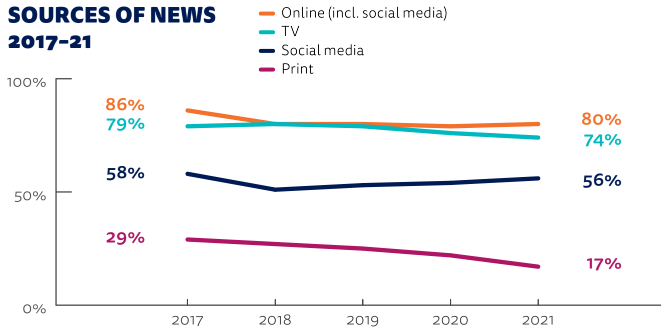


CHANGING MEDIA

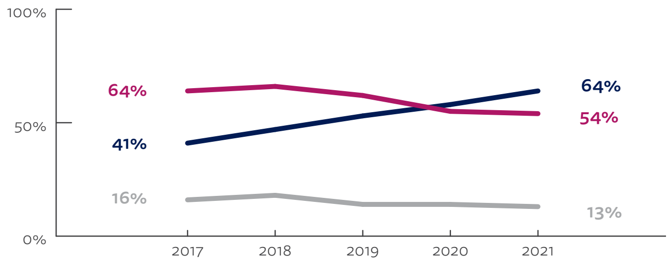
Slovaks are increasingly reliant on smartphones for access to news. Print is used as a news source by fewer than one in five adults; just four years ago nearly one-third relied on newspapers or magazines.

13% pay for **ONLINE NEWS**

SOURCES OF NEWS 2017–21



DEVICES FOR NEWS 2017–21



TRUST

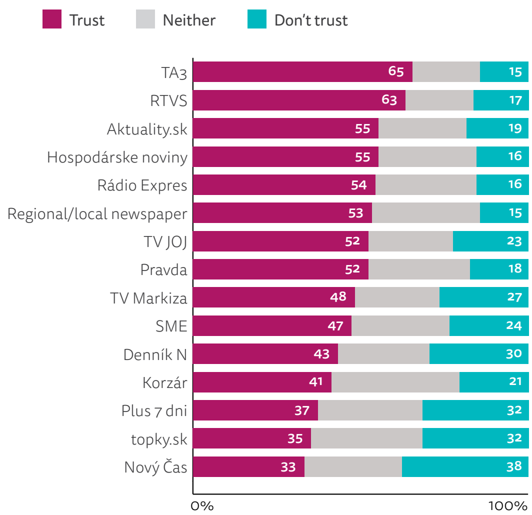
While overall trust in news recovered slightly from last year's low-point, almost all the surveyed brands saw their trust score fall. The biggest decline (-5pp) affected the country's leading news source, TV Markíza, praised by media critics for its pandemic response. Median's survey results on perceived objectivity confirm this trend.[72]

DIFFERENT TYPES OF TRUST

News overall	News I use
30% (+2) =43/46	42%

News in search	News in social
29%	16%

BRAND TRUST SCORES



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

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

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	55% (+1)	72%
2	YouTube	26% (+2)	67%
3	Facebook Messenger	19% (+2)	51%

Rank	Brand	For News	For All
4	Instagram	11% (+3)	29%
5	WhatsApp	9% (+4)	29%
6	Viber	5% (+1)	20%

SPAIN

STATISTICS

Population	**46m**
Internet penetration	**92%**

Governments and the media tried to unite the country in the battle against COVID-19, while journalists struggled to provide clarity among often contradictory messages about the pandemic. Meanwhile, as demand for news increased but traditional revenues fell, many news organisations pushed forward with pay strategies.

Spanish publishers have embraced digital paywalls in the last year, in the face of increased demand for reliable news but declining revenue from print and advertising. According to industry figures the left of centre national newspaper *El País* reached 100,000 digital subscribers just ten months after introducing its paywall in May 2020 in the midst of the pandemic. *El Mundo*, which started its pay model in October 2019, reported having 60,000 digital subscribers, also by March 2021. Meanwhile, the digital-born ElDiario.es reached 63,000 paying users as it made membership compulsory for full access, with free or discounted fees for those unable to afford it. Joining the freemium trend in 2020 were El Confidencial, *La Vanguardia*, and *ABC*. Our *Digital News Report* data also show some people paying for digital versions of local and regional papers. Some Vocento regionals had operated paywalls since 2015 and *La Voz de Galicia* since 2019. In total, the Spanish media market now records about 400,000 subscribers to online news services provided by nearly 30 news brands.

Despite soaring digital subscriptions, the main traditional media groups (PRISA, Unidad Editorial, and Vocento) lost millions from COVID-19's impact on advertising and print's declining sales. Publishers' associations requested more government support, arguing that loans and a reduction in VAT rates for digital subscriptions from 21% to 4% were insufficient.

Plans for a so-called 'Google tax' were approved in February 2020 and came into force in January 2021. The tax, of 3%, on digital services and online advertising is predicted to produce around €1bn in 2021. There has been discussion about how the revenues should be used to support different sectors in difficulty, including tourism and journalism. Back in 2014 Spain had pioneered the idea of a 'link tax' or 'snippet tax' charging platforms for aggregating news stories. This included the payment of copyright fees to news organisations, but led to the closure of Google News Spain in December 2014, and the approach was not at that stage adopted elsewhere.

Developments in the industry and policy arenas were reflected in changes in the editorial leadership of some of the major Spanish newspapers: four men were appointed editors-in-chief of major newspapers: Jordi Juan at *La Vanguardia*, Albert Sáez at *El Periódico*, Javier Moreno back at the helm of *El País*, and Julián Quirós at *ABC*. At the ownership level, Javier Monzón was dismissed as chairman of PRISA. His replacement, Joseph Oughourlian, was approved by the new major shareholders, Amber Capital, Telefónica, and Vivendi.

Public broadcaster RTVE has new leadership. The incoming chairman, José Manuel Pérez Tornero, sworn in in March 2021, is a well-respected and experienced Professor of Journalism but politicians faced accusations of appointing some political party loyalists to the board. TVE had already made significant changes in 2020 to its main broadcast channel, boosting political coverage in its midday schedule and modernising the presentation of its news bulletin of record, *Telediario*, and its 24-hour news channel registered its highest-ever annual audience share. However, RTVE online remains one of the less well used brands and on TV its reach still lags behind commercial rivals Antena 3 and Telecinco, whose faster-paced news, with high-profile presenters providing more commentary and sometimes hard-hitting political interviews, also inherit audiences from their popular entertainment programming. Regional public broadcasters' reach increased as audiences sought the regional angle on the pandemic as in Spain many key policies are made at the regional level.

Several firms modernised their products in spite of COVID-19 related difficulties. *El Periódico* and *La Razón* did their most radical print and online redesigns in decades. Catalan-language newspaper *Ara* overhauled its website and apps for its tenth anniversary. ElDiario.es refreshed its site and its quarterly print magazine, strengthened its newsletter offer, and started collaborating on exclusives and video with the smaller digital native infoLibre, of which it bought a 10% share.

PRISA started SER Podcast, complementing digital-native Podium Podcast. Podimo arrived in Spain in June 2020 and Audible in October; both signed up well-known Spanish hosts. Barcelona-based podcast platform iVoox, founded in 2008 and with a 20% monthly reach in Spain, launched a subscription service in September 2020. Public radio broadcaster RNE now provides more podcast-exclusive content and reached a distribution agreement with Spotify.

Samuel Negredo, Avelino Amoedo, Alfonso Vara, Elsa Moreno, and **Jürg Kaufmann**
University of Navarra

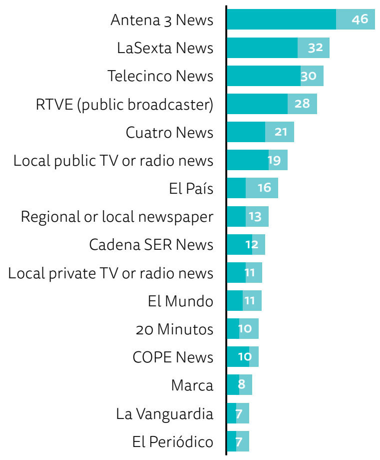
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

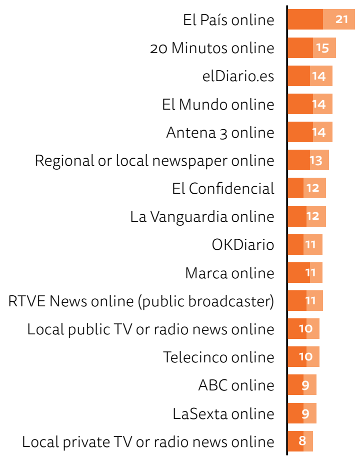
% Weekly usage

- **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



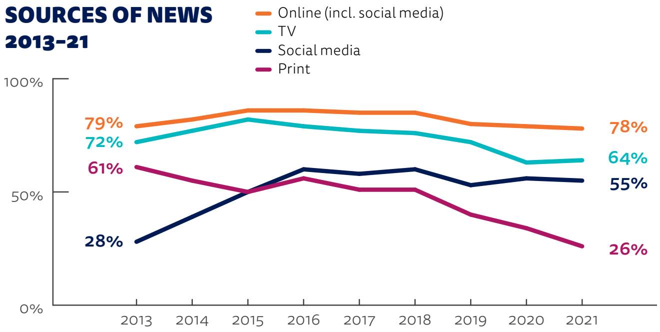
CHANGING MEDIA

Smartphones overtook computers for digital news access four years ago, and are now twice their level. Changing habits during the COVID-19 pandemic may have flattened the slow decline of tablets. Print's fall as a news source continued.

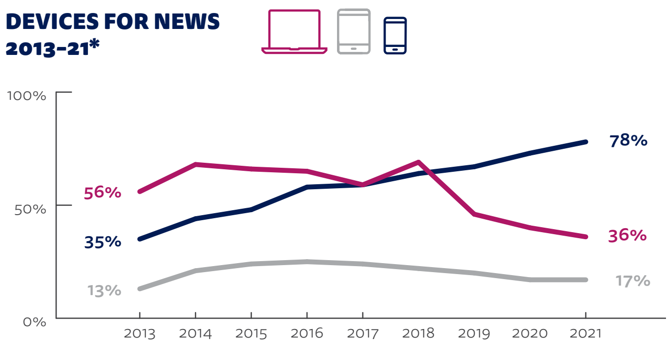
12% PAY pay for **ONLINE NEWS**

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

SOURCES OF NEWS 2013–21



DEVICES FOR NEWS 2013–21*



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

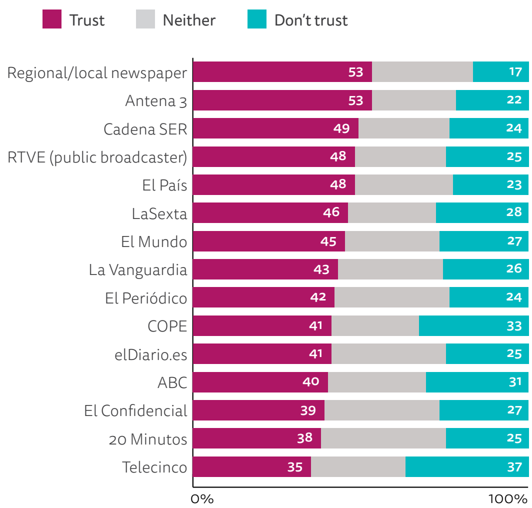
TRUST

Trust in the news remains at its lowest level since 2015 and the general figures show no change on 2020. When users are asked about specific media brands, trust shows a remarkable decrease in all cases and only regional/local newspapers and Antena 3 reach more than 50% of approval.

DIFFERENT TYPES OF TRUST

News overall	News I use
36% (-) =33/46	41%
News in search	**News in social**
30%	24%

BRAND TRUST SCORES



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

46% **SHARE NEWS** via social, messaging or email

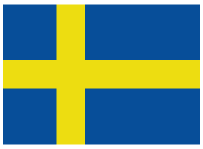
TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	39%	(-5)	66%
2	WhatsApp	35%	(+1)	83%
3	YouTube	21%	(-4)	70%
4	Twitter	19%	(-1)	33%
5	Instagram	17%	(-)	55%
6	Telegram	8%	(+3)	23%

SWEDEN

STATISTICS

Population	10m
Internet penetration	96%



Amid continued falls in revenues from advertising, traditional and commercial news journalism in Sweden is nowadays mainly financed by paid subscriptions, and increasingly supported by diverse subsidies.

Sweden is marked by wide-reaching broadband access and digital innovation, with global platform companies also gaining a strong foothold. Public service broadcasters and newspapers have long had a strong presence in the Swedish media market, and nowadays compete for attention online alongside a plethora of information sources, including alternative news media.

Public service broadcasters, Swedish Television (SVT) and Swedish Radio (SR), continue to play significant roles in the Swedish media landscape, and their legitimacy is associated with offering content for everyone and a wide reach among the public. Older citizens regularly turn to PSBs, but they must work harder to reach the young. In this regard, SR actively works with third-party platforms such as Facebook, Twitter, Instagram, and Spotify, focusing on audio and storytelling. SVT is also present on third-party platforms, yet tends to be more concerned about allowing platforms to collect and analyse metrics about their audiences. Many commercial news media companies in Sweden have also developed more restrictive approaches to platform companies.

There is a long history of Swedes subscribing to newspapers. Nearly one-third (30%) have paid for online news in the last year according to the Digital News Report survey, which places Sweden among the countries with the highest percentage paying for online news. *DNR* data show that many of the online subscriptions go to four national newspapers, *Aftonbladet*, *Expressen*, *Dagens Nyheter*, and *Svenska Dagbladet*. Sweden's local news sector, comprising more than a hundred local titles, has also been successful in attracting paying customers online – accounting for more than a third (37%) of the total. However, it should be noted that subscription data include those taking out short-term trial subscriptions and special offers. One study found major differences between subscribers, with short-term subscribers showing much less involvement and activity with the news compared to users with long-term ones.[73] Altogether, in 2020 nearly five out of ten Swedes lived in a household with a subscription for news (print or digital), whereas in the 1980s eight out of ten did.[74]

Despite the pandemic, according to the Swedish Newspaper Association the national and local morning newspapers increased their overall reader revenues slightly in 2020. The improvement was driven by online subscriptions, where revenues were up 45% on 2019, counteracting the impact of lower income from print subscriptions, down 4%, and declining advertising revenues, 21% down compared to 2019.[75] The global platform companies continue to take the majority of the digital advertising spend in Sweden, leaving publishers struggling to compete. Nevertheless, Swedish media companies have invested heavily in using data and analytics to acquire and engage online users and to maximise advertising and in 2020 the local news organisation MittMedia became the global INMA winner for 'Best use of data analytics or research'.

The COVID-19 crisis has affected Sweden and Swedish news media in various ways. Sweden has not enforced a strict lockdown, but the authorities have imposed multiple restrictions, and have also increased financial support to all struggling sectors, as well as more specific subsidies to the news industry. In 2020 a total of €144m was granted in direct support to commercial Swedish news media, placing the Swedish subsidy scheme very significantly ahead of all the other Nordic countries even after allowing for Sweden's larger population. The €144m total for 2020 compared to €62.7m in 2019 and included one-off payments of €29.6m in general editorial support and €14.8m in COVID support. News publishers have generally reorganised to work remotely, using digital platforms and tools such as Slack and Teams to coordinate news production activities.

Our survey findings suggest SVT, commercial channel TV4, SR, and local newspapers are the most widely used legacy news media, whereas Swedes predominantly turn to SVT and the evening tabloids *Aftonbladet* and *Expressen* for their online news. Several alternative online news media, Fria Tider, Nyheter Idag, and Samhällsnytt, which appear near the bottom of our list of news sources used each week, largely appeal to right-wing audiences and secure about 7% weekly reach each.

Oscar Westlund
Oslo Metropolitan University, Volda University College, and University of Gothenburg.

[73] Wadbring, I., Bergström, L. 'Audiences behind the Paywall: News Navigation among Established versus Newly Added Subscribers', *Digital Journalism* (2021). DOI: 10.1080/21670811.2021.1878919
[74] Ohlson, J., Blach-Ørsten, M., Willig, I. *Covid-19 och de nordiska nyhetsmedierna* (Gothenburg: Nordicom, 2021).
[75] 'Hushållen lägger mer pengar på nyheter', TU Mediefakta, 11 Mar. 2021. https://tu.se/mediefakta/hushallen-lagger-mer-pengar-pa-nyheter/

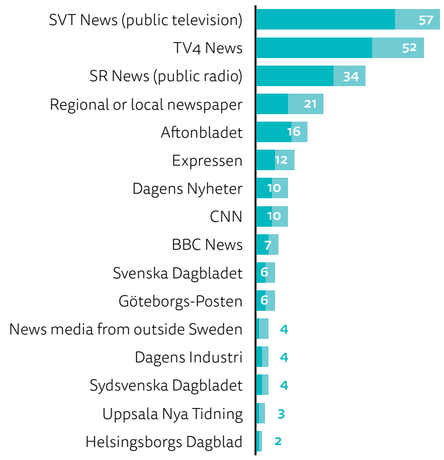
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

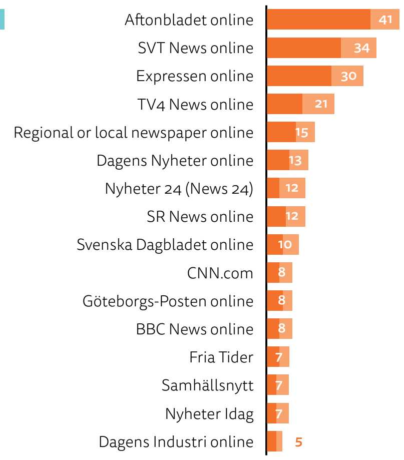
% Weekly usage

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

TV, RADIO AND PRINT



ONLINE



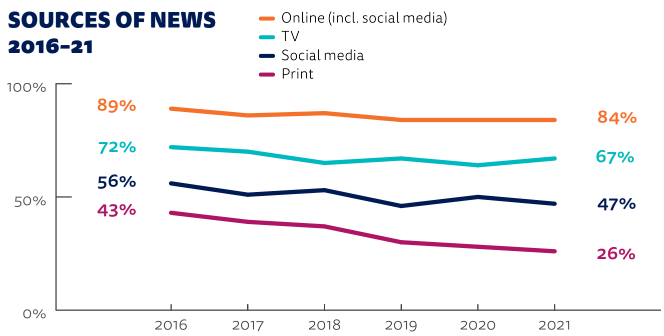
CHANGING MEDIA

Swedes continue to mainly use their smartphone for online news, followed by computers or tablets. These patterns have remained stable over time, as has social media use, for which Facebook is most important in general and for news.

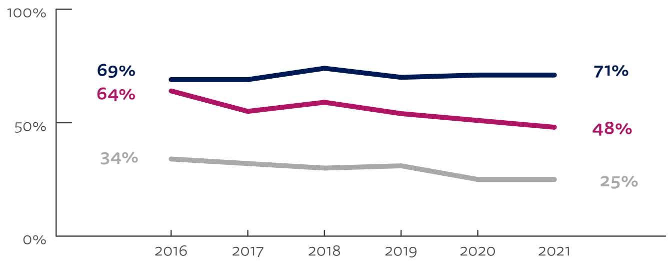
30% PAY pay for **ONLINE NEWS**

37% listen to **PODCASTS** in the last month

SOURCES OF NEWS 2016–21



DEVICES FOR NEWS 2016–21



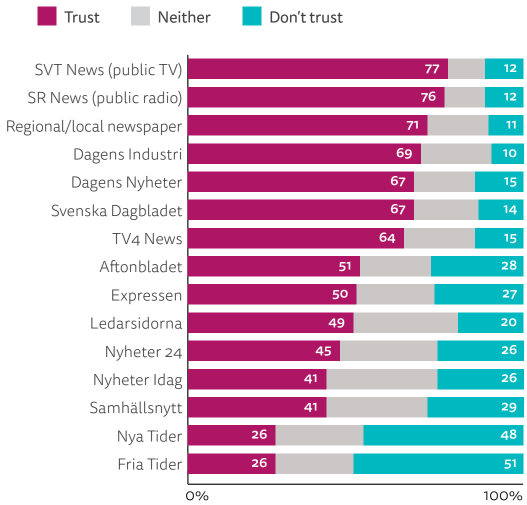
TRUST

Half (50%) of Swedes say they trust the news overall, significantly up from last year. As elsewhere, trust is higher in the news media individuals use, but with unusually low levels of trust in news found via social media. SVT, SR, and local media are most trusted, followed by quality newspapers.

DIFFERENT TYPES OF TRUST

News overall	News I use
50% (+12) =14/46	56%
News in search	**News in social**
30%	16%

BRAND TRUST SCORES



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

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

TOP SOCIAL MEDIA AND MESSAGING

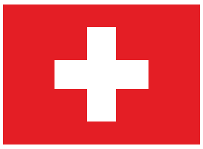
Rank	Brand	For News		For All
1	Facebook	29%	(-3)	69%
2	YouTube	14%	(-2)	61%
3	Facebook Messenger	10%	(+1)	52%

Rank	Brand	For News		For All
4	Instagram	9%	(-1)	53%
5	Twitter	7%	(-1)	14%
6	WhatsApp	4%	(+1)	22%

SWITZERLAND

STATISTICS

Population	**8.6m**
Internet penetration	**94%**



Swiss media operate within linguistically distinct and relatively small markets. Despite enjoying increasing trust in the COVID-19 pandemic, most media companies have only weathered additional economic pressure due to state subsidies, further cost-cutting, and revenues from non-journalistic activities.

COVID-19 has hit the finances of Switzerland's media companies hard, particularly those reliant on advertising or print sales, with our figures showing a seven percentage point decline in print as a news source. However, most companies remain profitable or have managed to contain losses, for multiple reasons. First, many have received emergency state funding and, like other companies, direct support for wage bills during the pandemic. Second, several media companies have intensified cost-cutting measures, including by reducing spend on journalists. Recent years had already seen the rise of a joint venture CH Media (AZ Medien and NZZ Mediengruppe) and the implementation of centralised newsrooms sharing national and international news across formerly independent news brands. TX Group, which has been following the same path since 2018, plans to further centralise news production, sharing local news between different titles and possibly reducing the coverage of some municipalities, which will increase 'media content concentration'.[76] Loss of distinct local coverage matters, particularly in Switzerland as a federal country where many important political decisions are decided at the regional and local level. Third, several commercial media companies have been diversifying into more profitable activities. TX Group, for instance, reorganised as a publicly listed holding company in 2020. The new structure includes news companies Tamedia (offering subscription media such as *Tages-Anzeiger*) and *20 Minuten* (popular free-sheets) which lost money due to falling advertising revenues, together with profitable marketing activities and online marketplaces, but their profits are not intended to cover deficits elsewhere.

The quality of news coverage of the pandemic has generally been good, with multiple angles covered and authoritative journalism.[77] This might help explain the recent rise in trust (+7pp). Data journalism has received a boost, as outlets such as tagesanzeiger.ch have compared data on the pandemic. A 'pivot to video', however, seems to be limited to tabloid journalism, with blick.ch launching Blick TV for its digital news and 20minuten.ch increasing video output also for mobile news consumption. Newsletters have become a common feature. Offering more than just a list of news articles, crowdfunded start-up Republik (which reported 28,000 subscribers in April 2021), for instance, has used a 'Covid 19 Uhr' (COVID 7 pm) newsletter to provide more analysis.

Developing digital business models remains challenging. Swiss media companies collaborated to create 'OneLog', a system to provide users a single login for online news content – both free and paid – from multiple providers, while companies hope to get better data for advertising. Generally, however, digital is intensifying competition and pressures on costs, increasing the need for new funding models. Most of the top online brands are free to access and reliant on advertising. Watson.ch, an online pure player specialising in native advertising and offering a mix of hard news and soft news, has recently started a spin-off in French-speaking Switzerland. Ringier, the publisher of Zurich-based tabloid blick.ch, has recently sold its prestigious French-language quality paper *Le Temps* to a non-profit foundation (Fondation Aventinus) but launches a French-speaking version of blick.ch in June 2021. While some see this as welcome investment in the small, underdeveloped French-speaking market, critics see it as motivated primarily by the desire to create a single national market for online advertising.

The public service broadcasters, i.e. SRF in German-speaking and RTS in French-speaking Switzerland, as the most trusted sources have seen significant increases in their online audiences (up 10pp and 6pp respectively), but reach online still significantly trails that offline. SRF's move to drop some well-known radio and TV cultural programmes, and launch digital formats on YouTube and Instagram or a multilingual video streaming platform, has been criticised both by commercial competitors and the cultural sector. RTS is also under scrutiny after revelations of sexual harassment, reflecting growing awareness of gender discrimination and the lack of diversity within the sector as a whole.

Media policy is slowly adapting to the digital transformation. A proposed law is expected to deliver a 30m Swiss franc direct subsidy to online news providers, including both legacy and digital-born companies but that sum pales in comparison with the planned 80–100m planned to support print distribution. In an already highly concentrated media market, this proposed media support might not be enough to substantially increase diversity and quality in the online sector.

Linards Udris and **Mark Eisenegger**
Research Center for the Public Sphere & Society, Department of Communication and Media Research, University of Zurich

[76] https://www.tandfonline.com/doi/abs/10.1080/1461670X.2020.1761865
[77] http://www.foeg.uzh.ch/dam/jcr:efe9e096-c9a1-4c33-b255-876200f5e40c/Main_Findings_2020.pdf

WEEKLY REACH OFFLINE AND ONLINE

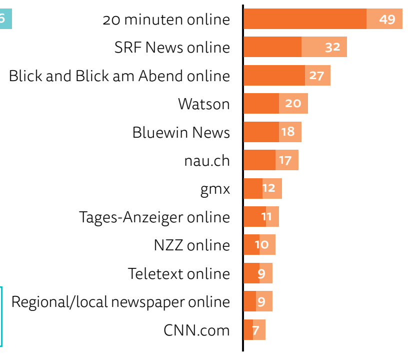
TOP BRANDS

% 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 (GERMAN)

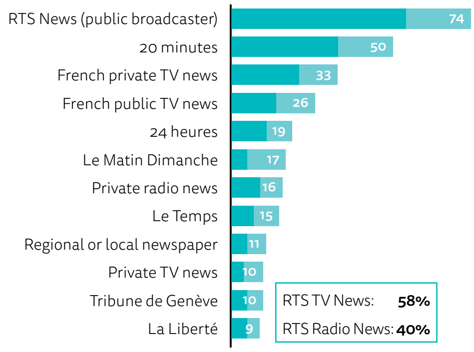
ONLINE (GERMAN)



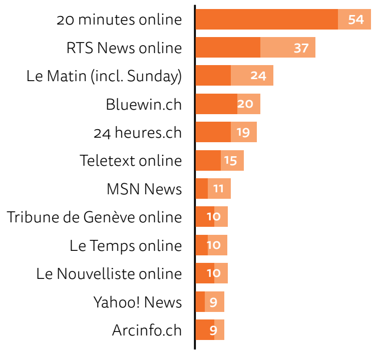
17% pay for **ONLINE NEWS**

French 22% | German 15%

TV, RADIO AND PRINT (FRENCH)

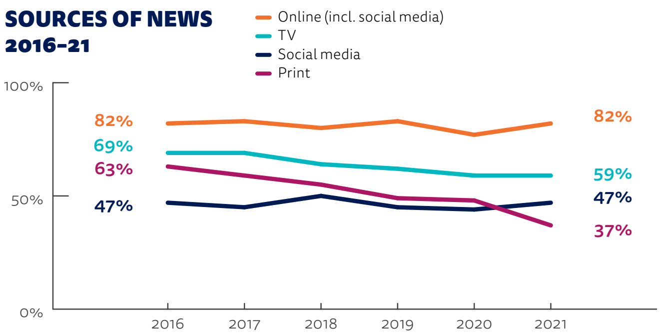


ONLINE (FRENCH)

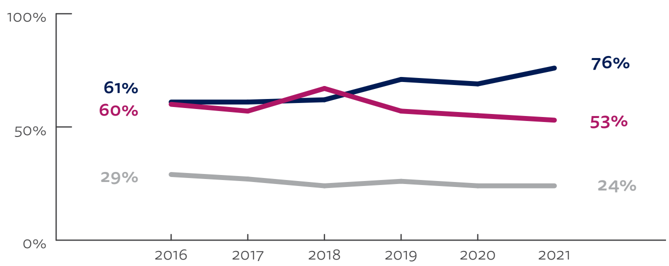


35% listen to **PODCASTS** in the last month

SOURCES OF NEWS 2016–21



DEVICES FOR NEWS 2016–21*



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

TRUST

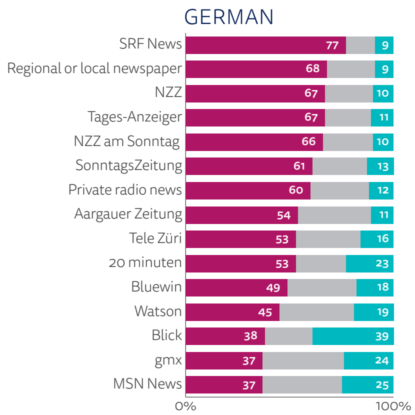
Overall news trust is up by seven percentage points, most likely linked to greater reliance on the media during COVID-19. In terms of brands, public broadcasters are the most trusted in both German- and French-speaking areas, followed by local newspapers and quality newspapers. Tabloids and digital-born brands are least trusted.

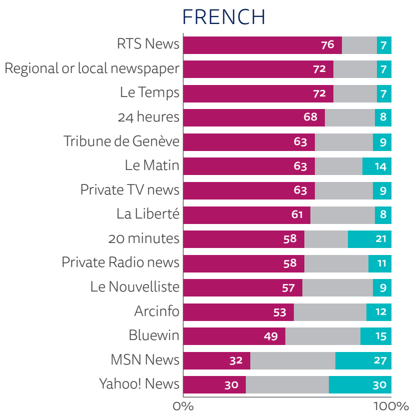
DIFFERENT TYPES OF TRUST

News overall	News I use	News in search	News in social
51% (+7) 13/46	58%	29%	20%
French 44%	French 51%	French 24%	French 14%
German 53%	German 60%	German 32%	German 22%

BRAND TRUST SCORES

Trust / Neither / Don't trust



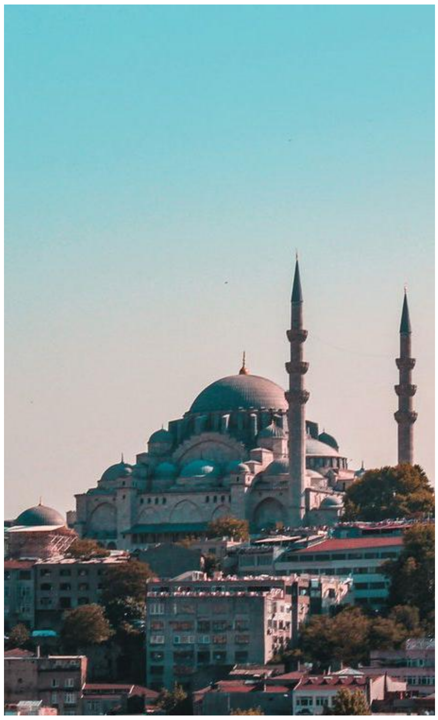


Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	For All
1	WhatsApp	30% (+4)	80%
2	Facebook	27% (-3)	57%
3	YouTube	24% (-)	63%
4	Instagram	13% (+2)	40%
5	Facebook Messenger	8% (-1)	28%
6	Twitter	6% (-)	12%

TURKEY



STATISTICS

Population	83m
Internet penetration	83%

In a news environment dominated by pro-government voices, citizens looking for different perspectives are increasingly turning to online news outlets, social media, and private messaging apps. But independent news organisations have faced greater threats to their editorial and financial independence over the last year.

Ranked 153rd out of 180 countries in press freedom by Reporters Without Borders, Turkey remains a difficult environment for independent journalism. Media outlets, particularly those critical of the government, are under constant political and financial pressure. In the past year, the Turkish media regulator, the Radio and Television Supreme Council, and the official Press Advertising Agency issued several broadcast and advertising bans, as well as imposing fines on outlets seen as critical of the government. These include Fox TV and Halk TV and newspapers such as *Birgün* and *Cumhuriyet*. Olay TV, a TV channel created in November 2020, was closed by their main shareholder after just 26 days, a decision its journalists blamed on pressure from government officials unhappy with what they saw as favourable coverage of a pro-Kurdish opposition party.[78]

In addition, thousands of websites and online news have been blocked, and legal action has been taken to remove news stories. Despite this, social media have become a significant source for independent perspectives, with 61% in our data saying they use it for news. However, self-censorship on social media has become common as social media users, including journalists, have found themselves facing prosecution for their posts.[79] In the second half of 2020, the Turkish government amended existing internet laws (mainly Law no. 5651) to require popular social media platforms to have a legal base in Turkey with an in-country representative to respond to content removal requests. According to the government, these new regulations – which raised concerns over freedom of speech – are aimed at protecting citizen rights and are based on the 'German model'.[80] All the big social networks – including Twitter which is often at the centre of political debates – have agreed to work within these new laws. The growing popularity of closed messaging apps such as WhatsApp (30% for news) and Telegram (13% for news) is likely due, at least in part, to the pressures on free expression applied to other outlets.

Despite this background, smaller online news outlets, such as Medyascope, dokuz8news, or Duvar, still have a large social media following and provide a range of alternative news and commentaries. Podcasts are also gradually becoming a significant source of news commentary as well as shows on lifestyle and entertainment.

The pandemic further damaged the political and financial conditions for independent journalism in Turkey. Journalists working for local and national news outlets were prosecuted or detained for their reporting on COVID-19.[81] Print newspaper sales, already in decline before the first COVID-19 case, slumped following the introduction of lockdown measures in Turkey. With the oldest (65+) groups hardest hit, news brands struggled to reach their most loyal readers and purchasers of print newspapers.

Misinformation has become an increasing concern for many during the pandemic, including the Turkish authorities who have investigated citizens for sharing 'baseless and provocative' information.[82] Turkey has a number of internationally recognised fact-checking organisations, such as teyit.org, who regularly debunk misleading Coronavirus-related claims. Fact-checking is, however, becoming an increasingly contested issue, as the Presidential Directorate of Communications has recently announced preparations for its own fact-checking platform called 'Doğru mu?'

Fox TV (54%), followed by the 24-hour news channel CNN Türk (33%) and *Sözcü* (32%), continue to be the most popular offline sources of news. Sondakika.com, CNN Türk online, and *Sözcü* online appear to be among the most used online sources. *Sözcü* is still seen as an independent outlet, critical of the government, albeit in a difficult political environment. In contrast, the recent acquisition of CNN Türk and *Hürriyet* by a pro-government business group has raised concerns that their coverage can no longer be regarded as unbiased. NTV is also seen as relatively impartial.

International brands like the BBC (20% weekly use online) are increasing their presence in Turkey's digital news market and providing more Turkish-language stories. Social media sites, such as Twitter, YouTube, and Instagram, are an essential access route for these brands. For instance, +90 – a new online outlet founded as a joint venture between Deutsche Welle, BBC, France24, and Voice of America – is increasingly popular on Instagram and YouTube, and publishes stories on youth poverty and fundamental rights, which are largely ignored in the traditional media.

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

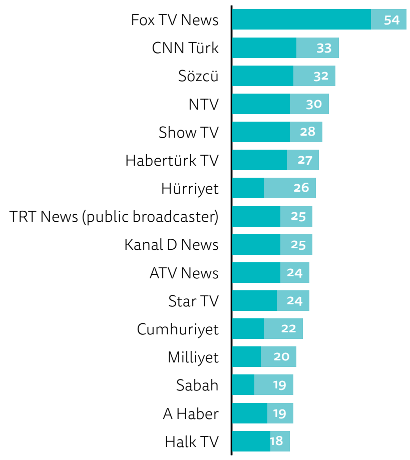
[78] https://www.bloomberg.com/news/articles/2020-12-26/turkish-tv-outlet-shuts-as-journalists-blame-government-pressure
[79] https://freedomhouse.org/country/turkey/freedom-net/2020
[80] https://www.bbc.com/turkce/haberler-turkiye-53480762
[81] https://rsf.org/en/news/turkish-journalists-arrested-reporting-covid-19-cases; https://www.coe.int/en/web/media-freedom/detail-alert?p_p_id=sojdashboard_WAR_coesojportlet&p_p_lifecycle=0&p_p_col_id=column-3&p_p_col_count=7&_sojdashboard_WAR_coesojportlet_alertPK=63989191
[82] https://www.hurriyetdailynews.com/turkey-detains-510-people-for-provocative-covid-19-posts-on-social-media-154989

WEEKLY REACH OFFLINE AND ONLINE

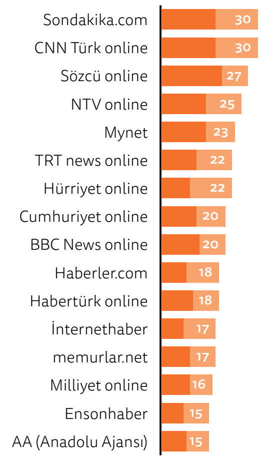
TOP BRANDS
% Weekly usage

- **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

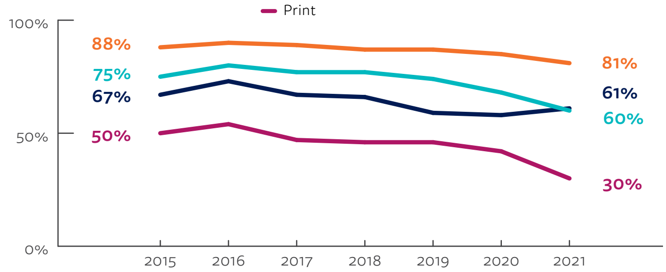


METHODOLOGY NOTE

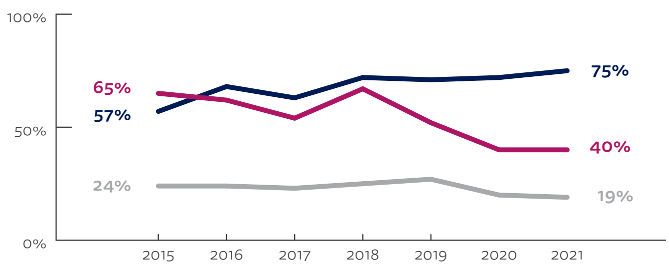
In 2021 we changed the panel providers for our online survey in Turkey as part of continued efforts to make our data as accurate as possible. Although we have used the same quotas on age, gender, and region, attempts to interpret change from 2020 to 2021 should be avoided. See Methodology on p. 6 for further information.

SOURCES OF NEWS 2015–21

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



DEVICES FOR NEWS 2015–21*



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

TRUST

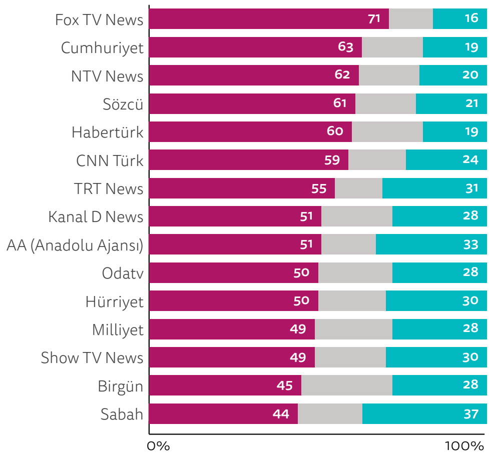
Fox News, *Cumhuriyet*, and NTV are three brands that our respondents rate most highly in terms of trust – with partisan brands generally less trusted. Overall trust in the news is down this year, though this headline number could have been affected by the switch to a new panel provider.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
41% (-14) =24/46	**47%**
News in search	*News in social*
40%	**36%**

BRAND TRUST SCORES

Trust / Neither / Don't trust



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

44%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	YouTube	40%	(-5)	71%
2	Twitter	34%	(+4)	48%
3	Instagram	34%	(-7)	64%
4	Facebook	30%	(-19)	54%
5	WhatsApp	30%	(-1)	72%
6	Telegram	13%	(+8)	34%

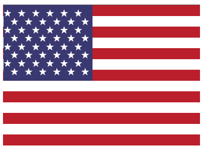
SECTION 3

Analysis by Country and Market
Americas

USA

STATISTICS

Population	327m
Internet penetration	96%



US news organisations have struggled to cover a pandemic that has claimed more than 500,000 lives, along with the contentious 2020 presidential election, a racial reckoning marked by nationwide protests, and a violent attack on the Capitol by supporters of the outgoing president. The unrelenting news cycle seemed to take a toll on audiences as well, with declines in consumption, interest, and trust in the news.

The long-predicted end of the 'Trump bump' showed up clearly in our Digital News Report survey, with a seven percentage point drop in the most avid news users (who access once a day or more), along with a decline of 11 percentage points in respondents who are 'extremely' or 'very' interested in news. Industry data echoed this trend, with national news brands especially hard hit.[83] Online traffic to the *New York Times* and *Washington Post* in February 2021 fell sharply from January's peak – 17% and 26%, respectively – and was also down year-over-year, according to ComScore data. Meanwhile, by mid-March CNN and MSNBC lost 45% and 26% of their prime-time audiences respectively, from highs in January.

The collective tuning out was no surprise after an unusually bitter election culminating in a second impeachment trial and the political exit (for now) of an extraordinarily divisive and attention-grabbing president. As a former CNN head predicted in August, 'What would go away is the bad guy in the story. There's no antagonist. So what are we tuning in for?'[84]

Another factor, though, may be declining attention to the Coronavirus pandemic; just 31% of US adults were following COVID news closely in a March 2021 Pew survey, down from 37% at the end of November and 57% in March 2020.[85]

While the early months of the pandemic coincided with record traffic levels for many news outlets, the loss of advertisers, distribution, events, and other revenue sources took a devastating toll. One consultancy report suggested the media industry lost more than 30,000 jobs in 2020, with national outlets such as BuzzFeed, Vice, Vox, and HuffPost announcing furloughs and layoffs. BuzzFeed acquired HuffPost in February but subsequently announced cuts affecting 47 US employees.

Local newsrooms faced particularly acute challenges. By February 2021, more than 60 local newsrooms across the country had closed, including those owned by large chains (CNHI) and local families and many that had been operating for more than a century.[86] These closures, as well as layoffs, furloughs, and reduced print days, exacerbated concerns about the rise of news deserts in the US, where nearly 1,800 newspapers have closed since 2004.[87] These declines have amplified calls for public funding for US media, including opportunities to confer non-profit status on news organisations and create subsidies supporting new journalism outlets and initiatives.

More positively, the *New York Times* attracted a record 2.3 million digital-only subscriptions in 2020 and, for the first time, saw its digital revenue overtake print. The *Washington Post*, whose digital subscriptions have reached nearly 3 million, announced in December 2020 that it would add 150 jobs in 2021, resulting in the largest newsroom in the company's history.

The summer of protests sparked by the death of 46-year-old George Floyd at the hands of four Minneapolis police officers in May 2020 drew millions of people to the streets across the country and caught the attention of news audiences. However, media organisations faced their own racial reckoning. Notably, the *New York Times* editorial page editor resigned after staff outcry over a column by Arkansas Senator Tom Cotton calling to 'send in the troops' against protesters, the *Philadelphia Inquirer*'s top editor left in response to staff rebuke of a 'Buildings Matter, Too' headline, and editors at *Variety* and *Bon Appetit* stepped down amid concerns about a lack of newsroom diversity. Calls for enhanced representation in newsrooms and news coverage also spurred the creation of The 19th*, a racially, ideologically, and socio-economically diverse non-profit news outlet led by women and focused on covering stories related to gender, politics, and policy, including the 2020 election, the pandemic, race, the LGBTQ+ community, health care, and business.

Meanwhile San Francisco-based Substack has been making headlines for attracting high-profile journalists away from established news outlets with a platform for monetising subscription digital newsletters. It now features the likes of Vox co-founder Matthew Yglesias, *Rolling Stone* contributing editor Matt Taibbi, BuzzFeed senior technology reporter Alex Kantrowitz, and *New Republic* climate reporter Emily Atkin, with some journalists drawing hundreds of thousands of dollars in subscription revenues.

Joy Jenkins
University of Tennessee, Knoxville, and
Lucas Graves
University of Wisconsin-Madison

83 https https://www.washingtonpost.com/lifestyle/media/media-trump-bump-slump/2021/03/22/5f13549a-85d1-11eb-bfdf-4d36dab83a6d_story.html
84 https://digiday.com/media/theres-no-antagonist-news-outlets-mull-the-possible-end-of-their-editorial-and-business-side-trump-bump-bonanza/
85 https://www.pewresearch.org/fact-tank/2021/03/26/attention-to-covid-19-news-drops-but-democrats-still-substantially-more-interested-than-republicans/
86 https://www.poynter.org/locally/2021/the-coronavirus-has-closed-more-than-60-local-newsrooms-across-america-and-counting/
87 https://www.usnewsdeserts.com/reports/expanding-news-desert/loss-of-local-news/loss-newspapers-readers/

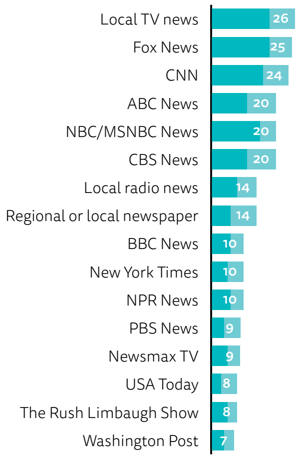
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

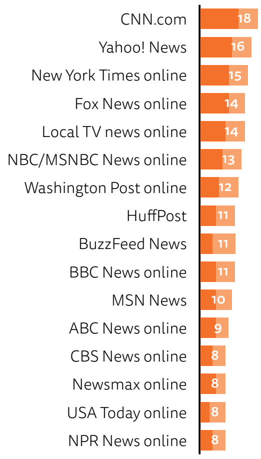
% Weekly usage

- **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



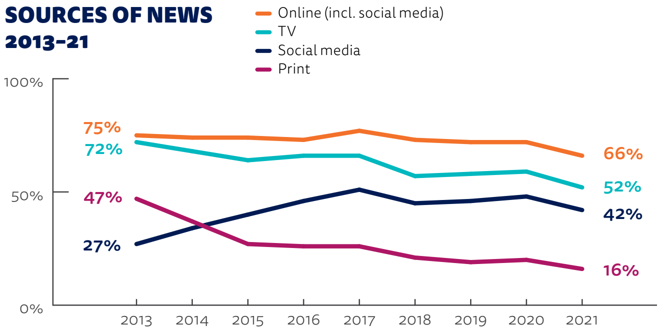
CHANGING MEDIA

All major channels for news – TV, print, online, and social – saw parallel declines as regular news sources, with print and TV dropping to historic lows after small gains in 2020.

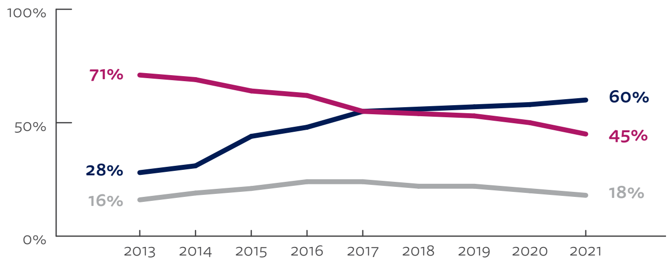
21% PAY pay for **ONLINE NEWS**

37% listen to **PODCASTS** in the last month

SOURCES OF NEWS 2013–21



DEVICES FOR NEWS 2013–21



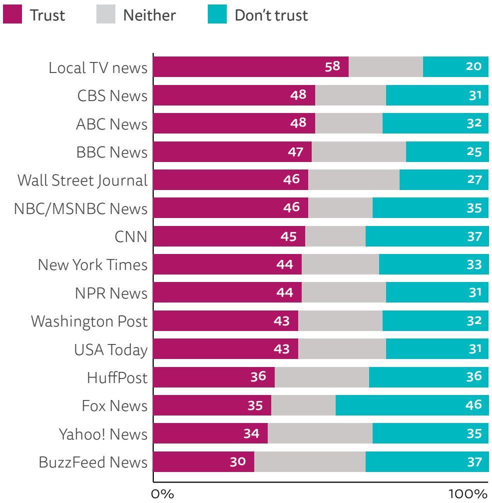
TRUST

Overall trust measures remained flat in the US, with only tiny dips for trust in 'news I use' and 'news in social'. These findings highlight the challenges of translating 2020's surging news usage into long-term trust-building in the highly polarised American market. Cable news channels Fox News, CNN, and MSNBC have some of the highest levels of distrust.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
29% (-) 46/46	**44%**
News in search	*News in social*
22%	**13%**

BRAND TRUST SCORES



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

31% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	28%	(-7)	58%
2	YouTube	23%	(-1)	60%
3	Twitter	13%	(-4)	25%
4	Facebook Messenger	9%	(-)	40%
5	Instagram	8%	(-)	31%
6	WhatsApp	6%	(+2)	15%

ARGENTINA

STATISTICS

Population	**44m**
Internet penetration	**93%**

Coronavirus has placed fresh pressures on the news industry in Argentina, one of the biggest media markets in South America. Journalists have provided detailed coverage of the epidemic and lockdowns, but lower revenues left many major news companies dependent on state subsidies.

On the first day of the Coronavirus lockdown in Argentina, the country's major daily newspapers did something unusual: they put aside partisanship and agreed to run the same front-page headline. On a blue background, the headline read: 'We will stop this virus together. Let's make responsibility go viral.' The next few months saw the story grow – in the following six months, six of the ten most popular stories from the websites of *La Nación*, *Clarín*, Infobae, and *Página/12* were about the pandemic (Zunino and Arcangeletti Yacante 2020). But as deaths increased, and lockdown measures including school closures became increasingly unpopular, coverage became once again more polarised. Outlets generally reverted to type, mirroring their normal pro- or anti-government stances. *Clarín*, *La Nación*, and Infobae adopted a more negative tone and *Página/12* maintained its alignment with the government. Cable news did the same: TN and La Nación + tended to oppose President Alberto Fernández and his policies, while TV channels C5N and IP generally supported him.

Polarised coverage might explain the relatively low levels of trust in news, which only 36% of respondents find credible, and the high levels of distrust in well-known brands. The Public Broadcasting System, which includes Televisión Pública and Radio Nacional, plays a minor role and does not serve as a trusted source. It is perceived as pro-government, regardless of which party is in power, a result perhaps of the lack of independent funding and oversight.

Despite COVID-19, news consumption in Argentina declined across television, online, social, and print. Lower print circulations led to newspapers either setting up, or tightening, paywalls. *Perfil*, which publishes print editions at weekends, told readers 'every day it becomes more difficult for us to sustain structures that allow us to carry out critical, incisive journalism, [which is] by definition expensive'.[88] The top-selling print newspapers, *Clarín* and *La Nación*, which had launched their paywalls in 2017, reached 300,000 digital subscribers each for the first time. Despite the economic crisis, 15% of respondents reported paying for online news, compared to 11% a year before. Subscriptions to entertainment platforms, such as Netflix and Disney+, also increased. Infobae, the top news brand in weekly usage, remains the only major online news outlet with no paywall or voluntary subscription model.

Loss in print revenue also led news outlets to expand their video strategies. *La Nación* revamped its cable channel, La Nación +, which had launched in 2016, hiring anchors and journalists and investing in new studios. *Perfil*, which had set up its own terrestrial television channel in 2018, Net TV, also hired new staff and refreshed its programming. Grupo Octubre, parent company of left-wing daily *Página/12*, launched another cable news channel, IP. These three new networks join TN (owned by Grupo Clarín), Crónica, C5N, Canal 26, and América 24, making a total of eight news networks in a country of 45 million people. Ratings are low: top-rated TN, which is also the most popular offline brand in this report, had an average daily viewership of less than 200,000. Infobae, rather than investing in its own TV infrastructure, put programmes on YouTube, including a documentary on the last days of Diego Maradona, which reached more than 3 million viewers.

Although the media industry in Argentina has been under economic hardship since the start of the recession in 2018,

the pandemic has further complicated matters. The government launched a programme to subsidise salaries across the private sector (ATP, Emergency Assistance to Labor and Production), and several media companies benefited.

A variety of media players – big and small, national and regional – are taking part in Google News Showcase, a programme which gives them prominence in Google News listings and helps them monetise their content. Thirty-one companies are taking part, including *Clarín*, *La Nación*, *Perfil*, and Infobae, and also regional companies such as *El Litoral* from the Province of Santa Fe. The selected companies include pro- and anti-government media. Smaller media who were not included fear marginalisation, and though it has not been announced how much each player stands to earn from the programme, outlets which were included have publicly expressed their satisfaction with the arrangement.

Eugenia Mitchelstein and
Pablo J. Boczkowski
Center for the Study of Media and Society, Argentina (MESO)

88 https://www.perfil.com/noticias/medios/carta-a-los-lectores-de-perfil-por-el-lanzamiento-del-paywall.phtml

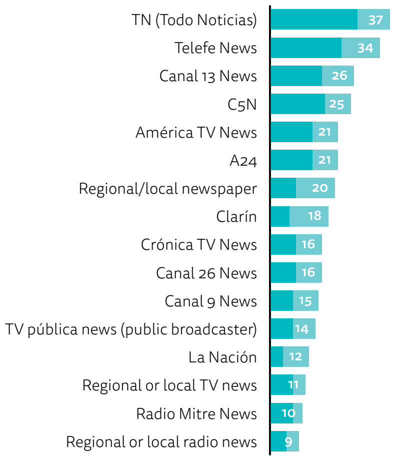
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

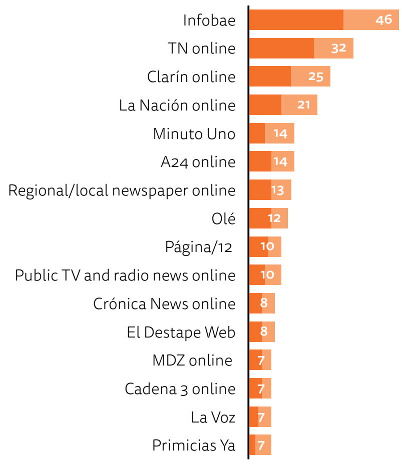
% Weekly usage

- **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



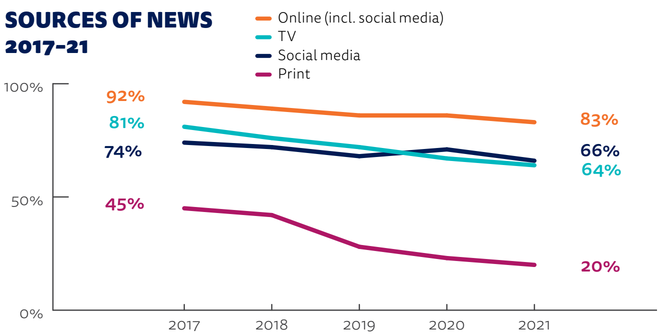
CHANGING MEDIA

News consumption has been decreasing since 2017. In 2020, heightened interest in news at the beginning of the pandemic gave way to fatigue in the final months of the year. Smartphones lost ground as devices for news, while computers stopped their decline.

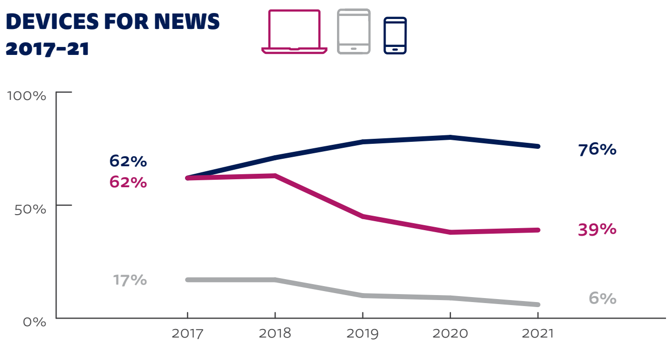
15% pay for **ONLINE NEWS**

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

SOURCES OF NEWS 2017–21



DEVICES FOR NEWS 2017–21



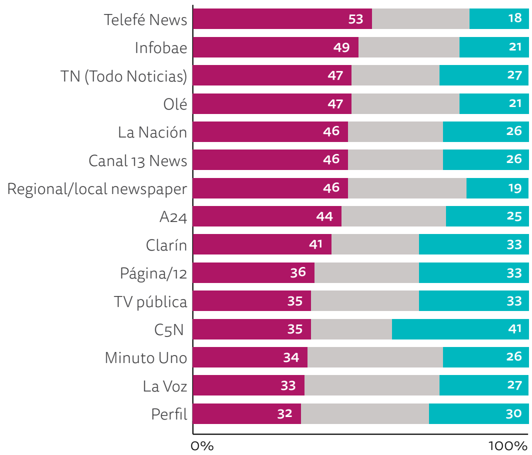
TRUST

Trust in 'news overall' and 'in news I use' increased to 36% and 47% respectively when compared to the previous year but remained far from their 2018 peak of 41% and 52%. In contrast, trust in news in social media has remained low but stable. High levels of political polarisation affect the media industry in Argentina, with many well-known brands attracting strong levels of distrust.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
36% (+3) =33/46	**47%**
News in search	*News in social*
34%	**28%**

BRAND TRUST SCORES



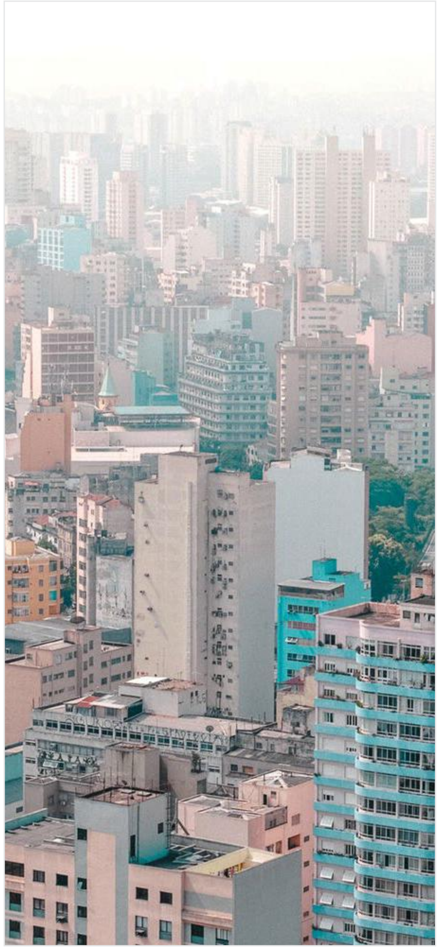
Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

45% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	56%	(-9)	80%
2	WhatsApp	36%	(-2)	86%
3	Instagram	25%	(+2)	62%

Rank	Brand	For News		For All
4	YouTube	24%	(-2)	73%
5	Twitter	12%	(-2)	23%
6	Facebook Messenger	7%	(-3)	35%



BRAZIL

STATISTICS

Population	**211m**
Internet penetration	**71%**

Brazil has been among the nations worst affected by Coronavirus – with the second highest death toll after the US by early 2021. The media have been highly critical of far-right President Jair Bolsonaro's handling of the crisis, which included a series of false statements about a disease he has described as 'a little flu'. The media have, however, also come under attack.

Brazil's most influential newspapers, including *O Globo*, *Folha de S. Paulo*, and *O Estado de S. Paulo*, criticised Bolsonaro's repeated statements which downplayed the pandemic. In particular they highlighted his COVID scepticism, his prioritising of the Brazilian economy over social distancing, and the federal government's delay in ordering vaccines.

Free-to-air TV networks – still very popular – have been split on the issue. Some, like Rede TV and Record TV, seem to be more positive towards the administration. But Globo, the largest TV broadcaster, has strongly made the case for following WHO recommendations. The press generally supports following a scientific approach.

The president has made misleading claims about Coronavirus and treatments, including promoting hydroxychloroquine which he said helped cure him, and he has also criticised mask-wearing. In November he stated he would not take any vaccine.[89] More than 400,000 Brazilians had died by May 2021.

In March, Twitter removed two of the president's posts which included videos where he could be seen walking among dozens of supporters and attacking stay-at-home measures. The company said the videos violated its rules. The next day, Facebook and Instagram removed similar posts – Mark Zuckerberg said it was an example of Facebook removing false information. By 13 April 2021, Aos Fatos (To the Facts), an independent fact-checking agency, said it had identified 2,805 false or misleading statements made by President Bolsonaro during his 833 days in office. The president has also attacked the press aggressively. A report by the National Federation of Journalists in January 2021 blamed his rhetoric for a rise in attacks on journalists. In 2020 it counted 428 verbal and physical assaults, including two homicides – the highest number since the early 1990s. The president himself was responsible for 175 of the verbal attacks, it said.[90]

The Brazilian Association of Radio and Television Broadcasters said a survey had found 7,900 posts were being published online every day which contained derogatory language towards the press. Reporters Without Borders said that Bolsonaro, along with his relatives and some government officials, had created an atmosphere of 'hatred and distrust toward journalism in Brazil'.

COVID-19 hit the advertising market hard, and seems to have accelerated the migration to digital platforms. Overall circulations of the ten best-selling newspapers fell by 9.2%, but the digital proportion of their readership rose to 64% in the first half of 2020. Virtually all papers have tightened their paywalls, but many have also been offering digital subscriptions at significant discounts. The shift might also have something to do with readers being concerned – at least in the early stages of the pandemic – about the risk of infection from paper. *O Globo* reassured readers that this was unlikely if simple hygiene measures, such as washing hands, were taken.

Commercial television broadcasters are still the main force in the country's media landscape but have continued to lose ground to social media as a source of news. Free-to-air TV's share of the advertising market remained stable at 51.9% but Brazilians are showing themselves unwilling to pay for online news, and paid TV lost more than 800,000 subscribers as the trend of cord-cutting continued[91].

Conversely, streaming services, led by Netflix, had a boom year as people spent more time at home. Leading TV station Globo, which in 2015 launched its own streaming service, Globoplay, showing a combination of telenovelas, sport, and international programming, has now introduced more than 80 of its podcasts onto the platform as it extended into audio. It also announced partnerships with independent content producers to diversify its podcast portfolio.

A significant investment came with the launch of the Brazilian version of CNN as a paid 24-hour news channel. The Atlanta-based network licensed its brand to a new Brazilian company led by journalist Douglas Tavolaro and billionaire entrepreneur Rubens Menin, which at launch said it would be hiring 400 journalists around the world. Almost all of its programmes are Brazilian-made. Tavolaro left the venture after 12 months.

Rodrigo Carro
Financial journalist and former Reuters Institute Journalist Fellow

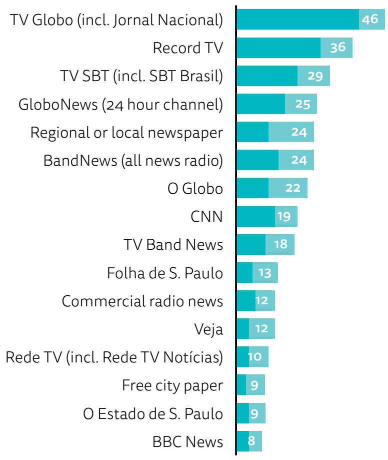
89 https://www.reuters.com/article/us-brazil-bolsonaro-vaccine-idUSKBN28704L
90 https://latamjournalismreview.org/articles/attacks-journalists-brazil-2020-bolsonaro/
91 www.teleco.com.br

WEEKLY REACH OFFLINE AND ONLINE

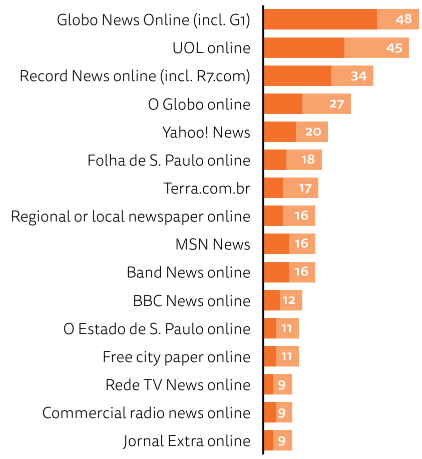
TOP BRANDS
% Weekly usage

- **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



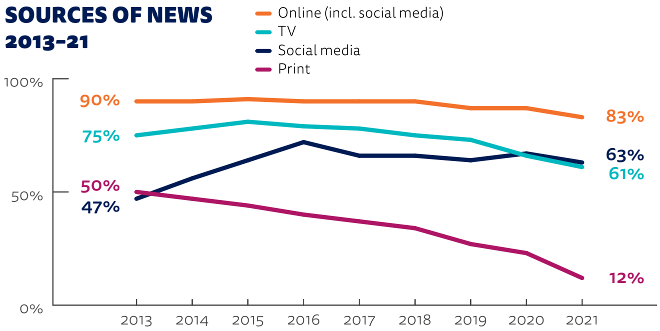
METHODOLOGY NOTE

In 2021 we changed the panel providers for our online survey in Brazil as part of continued efforts to make our data as accurate as possible. Although we have used the same quotas on age, gender, and region, attempts to interpret change from 2020 to 2021 should be avoided. See Methodology on p. 6 for further information.

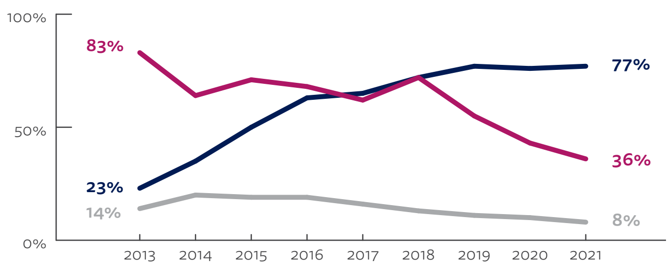
17% pay for **ONLINE NEWS**

PAY

SOURCES OF NEWS 2013–21



DEVICES FOR NEWS 2013–21*



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

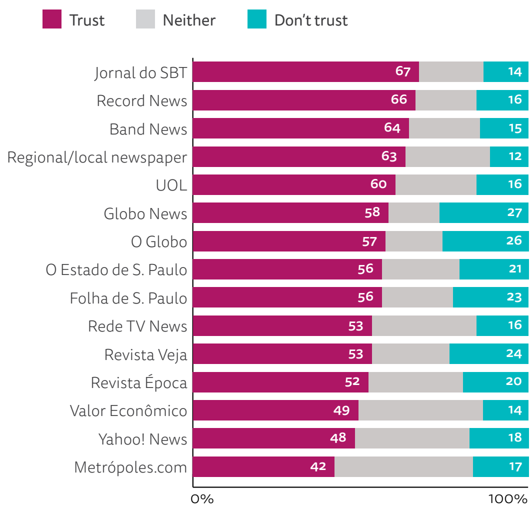
TRUST

The uncertainty brought by the health crisis apparently strengthened people's appetite for reliable information. Overall trust in the news is relatively high by international standards with trust much lower in news published on social media. TV brands tend to be most trusted along with local and regional newspapers.

DIFFERENT TYPES OF TRUST

News overall	News I use
54% (+3) =7/46	52%
News in search	**News in social**
48%	34%

BRAND TRUST SCORES



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

47% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All	Rank	Brand	For News		For All
1	Facebook	47%	(-7)	72%	4	Instagram	30%	(-)	61%
2	WhatsApp	43%	(-5)	80%	5	Twitter	12%	(-5)	23%
3	YouTube	39%	(-6)	77%	6	Facebook Messenger	11%	(-2)	35%

CANADA

STATISTICS

Population	37m
Internet penetration	90%

Canadian media companies continue to build new revenue sources, from tech services to parcel delivery, to offset the accelerated decline of advertising. The long-term effects of the pandemic on the industry remain uncertain.

The Canadian advertising market was among the hardest hit globally in 2020. One year into the pandemic, 40 media outlets have closed permanently and the status of 19 'temporary' closures is still undetermined. The media sector reported 1,200 permanent job losses; 1,800 more job cuts are still in the balance. [92] Many newspapers have suspended or reduced print distribution. Although digital ad spending increased, online news sources were not spared: HuffPost Canada ceased its operations in March 2021.

News organisations' websites offered free (non-paywalled) online content related to Coronavirus for several months; some created specialised newsletters which are still running a year later. Coverage of the pandemic was largely supportive of public health measures, which led to some criticism, but also online harassment. In Quebec City, a talk radio station lost several advertising clients for giving regular airtime to 'COVID sceptics'.

The crisis has forced some publications to step up the pace of digital innovation. *The Globe and Mail* credits a homegrown AI (Artificial Intelligence) tool called Sophi for helping it reach 170,000 digital subscribers and bring in millions of dollars of revenue. Sophi also assists with editing the homepage, allowing journalists to focus on finding and reporting stories.[93] The *Toronto Star* parent group, Torstar, meanwhile, launched a package delivery service and is branching out into online gaming. Online newspaper La Presse launched a new brand for its sponsored content, Studio XTRA La Presse, and surveyed readers about an ad-free paid subscription for its digital daily news. A group of six regional dailies in Quebec, CN2i, adopted an online subscription model offering access to all publications.

As part of the licence requirements for its acquisition of an over-the-air television network, renamed Noovo, Bell Media created a French-language news service including regional broadcasts, and hired 60 staff. The French-language market leader, TVA, increased its regional news offerings a few weeks before the launch. Both TVA and CTV, the leading English network, have rebranded their online streaming services. Global News is offering local news streams for Montreal, Winnipeg, and Halifax in addition to Calgary, Edmonton, and Toronto.

Discussion of racial diversity and inclusion in Canadian newsrooms intensified in response to the Black Lives Matter movement and racist incidents in Canada, such as the death of Joyce Echaquan, a young Atikamekw woman, who recorded verbal abuse from hospital workers on a Facebook Live video. New diversity initiatives include New Canadian Media, a news site dedicated to immigrant and minority ethnic reporting, Room Up Front, a minority photojournalist mentorship programme, and youth news site The Pigeon.

New partnerships and collaborations also emerged during this challenging year. APTN, Canada's national Indigenous television network, joined forces with news organisations in Australia and the United States to produce The Anti-Indigenous Handbook, an investigative reporting project. Other initiatives of note include a new national non-profit association for independent news organisations, Press Forward; a directory of local news sources hosted by CBC; and a vote for unionisation by the employees of Canadaland, a news-focused podcast.

During the public broadcaster's licence renewal hearings, concerns were raised about CBC/Radio-Canada's focus on advertising revenue and its French-language sponsored content service.

In February 2021, nearly 100 newspapers printed a blank front page as part of a national campaign to bring attention to the impact of global tech giants such as Google and Facebook on the sustainability of journalism. The Canadian government tabled legislation to extend broadcast regulation to digital audiovisual content providers. Foreign-based digital services will be forced to charge sales tax; a corporate level tax on digital companies operating in Canada will take effect in 2022. However, in the context of a minority government, an election before the end of 2021 is a real possibility.

In addition to increased government ad money (especially public health messages) since the beginning of the pandemic, a number of previously announced direct public subsidies are coming into effect. Dozens of journalists have been hired through a government grant to cover rural and underserved audiences, including First Nations communities. Some media organisations will also now be able to issue tax receipts for donations; some online news subscriptions are now eligible for a tax credit. Media literacy and anti-disinformation projects spearheaded by media outlets and journalism associations have received public funding as well.

Colette Brin
Director, Centre d'études sur les médias, Université Laval.

Professor Brin is also chairperson of the Independent Advisory Board for Canada's journalism tax credit programme and is a member of the Steering Committee for the Digital Citizen Initiative.

Editor's note: In a previous version of this page, we stated wrongly that La Presse was considering a paid subscription for its digital daily news.

[92] Wechsler, S. 'A Year of Mapping Media Impacts of the Pandemic in Canada', J-Source, 11 Mar. 2021. https://j-source.ca/article/a-year-of-mapping-media-impacts-of-the-pandemic-in-canada-covid-19-media-impact-map-for-canada-update-march-11-2021/

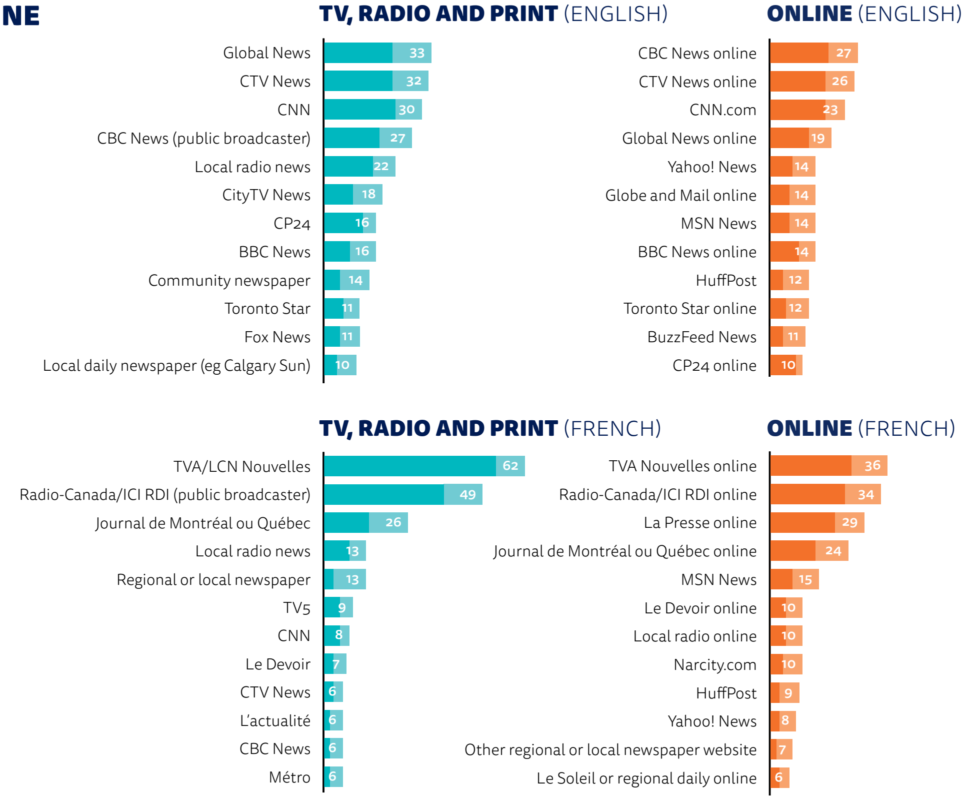
[93] https://www.pressgazette.co.uk/phillip-crawley-interview-globe-and-mail-canada/

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



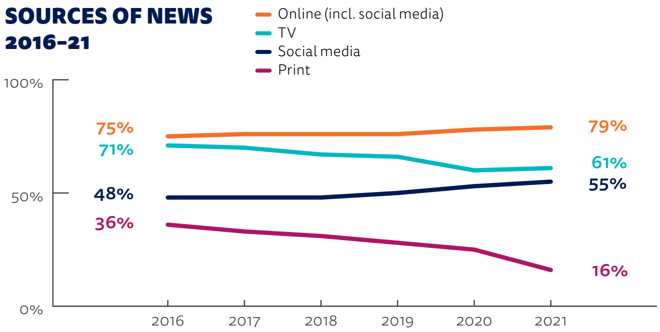
13% pay for **ONLINE NEWS**

English 14% | French 12%

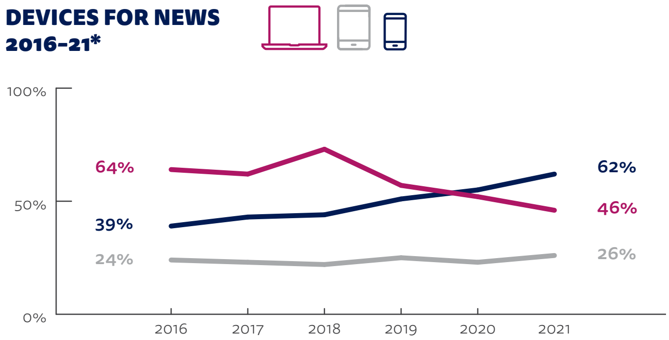
33% listen to **PODCASTS** in the last month

English 35% | French 26%

SOURCES OF NEWS 2016–21



DEVICES FOR NEWS 2016–21*



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

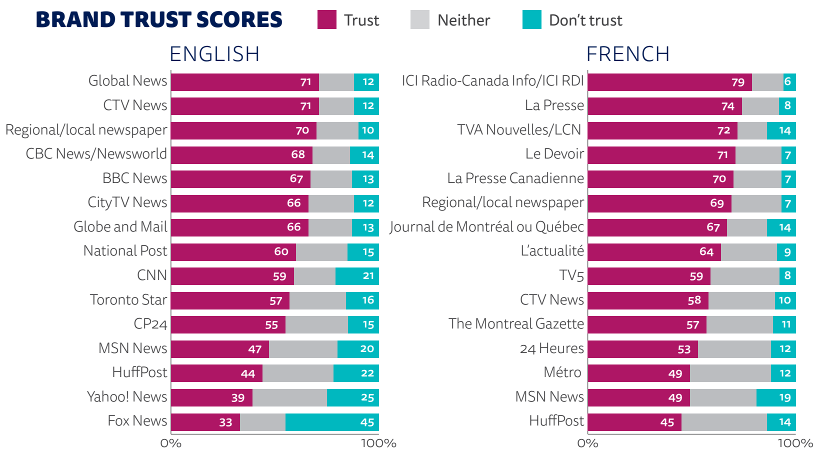
CHANGING MEDIA

The context of the pandemic accelerated the decline of print news sources. Since 2020, smartphones have surpassed computers as preferred devices for online news – by a majority of both English- and French-speaking Canadians.

DIFFERENT TYPES OF TRUST

	News overall	News I use	News in search	News in social
	45% (+1) =19/46	51%	31%	18%
English	44%	49%	31%	18%
French	54%	61%	36%	23%

BRAND TRUST SCORES



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

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news		For All
1	Facebook	41%	(-)	69%
2	YouTube	27%	(-)	67%
3	Facebook Messenger	18%	(+5)	52%
4	Instagram	13%	(+3)	35%
5	Twitter	11%	(-2)	20%
6	WhatsApp	8%	(+2)	22%

CHILE

STATISTICS

Population	18m
Internet penetration	77%

COVID-19 has given the media the opportunity to rebuild public trust, which was undermined during student-led protests in 2019 where news organisations were seen to take the side of large economic interests. Efforts to report the pandemic in an independent fashion have helped journalists restore some credibility, but have also led to conflict with the government.

As the pandemic took hold, the Chilean minister of health took aim at the media, accusing them of, among other things, wanting to 'sell by inventing lies'. The minister also refused to answer a question at a news conference, an event which became a Twitter trending topic. The exchanges have highlighted changing relationships between the media and those in power. Until now, there has not been a strong cultural expectation that daily journalism would fulfil a watchdog role. That seems to have evolved in the aftermath of social protests which gripped the country in the months before the pandemic.

After the minister in question left office, his replacement initially made an effort to improve relations with the media – and communication with the public – by staging daily Coronavirus news conferences. These found a significant audience on television, as viewers looked for information on the outbreak and how they should respond to it. News websites and portals introduced counters that tracked the number of cases, deaths, and the rate of infection based on official figures. Most sites also introduced special sections, and *La Tercera*, one of the biggest newspapers, offered readers its Coronavirus coverage without charge.

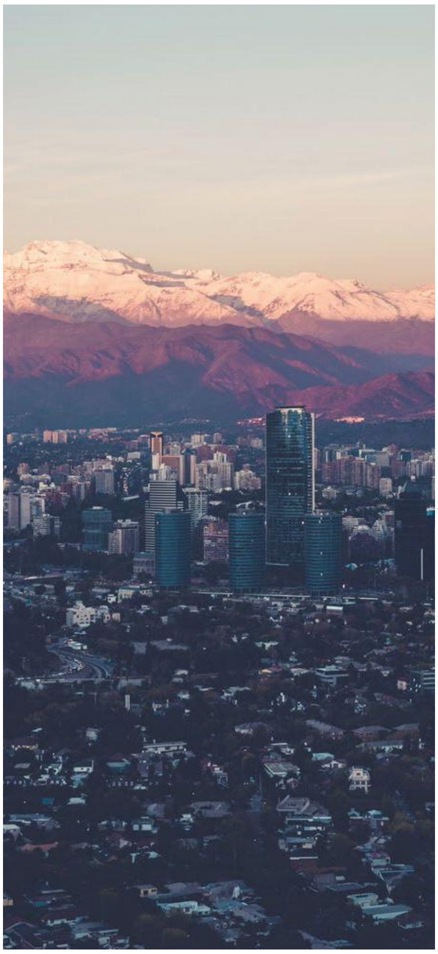
After these changes, tensions between the government and the media eased slightly, only for them to rise again in April 2021 when the minister accused the *New York Times* and the *Washington Post* of covering Chile's rise in infections unfavourably. The country's vaccination roll-out has been the fastest in South America – and also ahead of global averages.

The challenges of COVID-19, along with the consequences of the protests, led to a period of soul searching. Journalists and others examined their role in society and what needed to change. The protests had highlighted a crisis in trust in establishment powers, including the media – one popular slogan had been 'Turn off the TV', in part a reflection of a feeling that daily journalism had not done its duty in prioritising accurate information above commercial interests or holding those in power to account. These sentiments about television news do not extend to radio.

There was a discernible effort by the media to rebuild trust with its audiences – this was particularly felt in TV stations changing their approach to morning programming. Where previously they had shown four hours of entertainment chat, they started offering politics and current affairs, with opinionated journalists debating with members of congress and mayors. The change was so marked that sanctions were introduced in parliament for congress members who neglected their duties because they had been participating in morning shows.

Some outlets have tried to rebuild trust by strengthening their own editorial processes or by introducing fact-checking initiatives, especially concerning misinformation about COVID-19. The role of fake news and citizens' responsibilities on social media have become a subject of national debate.

Despite the interest in COVID, falls in print circulation continued, and the biggest newsrooms, including in television, have responded by making dramatic rounds of layoffs. Copesa, the parent company of *La Tercera*, cut more than 200 jobs and ceased printing *La Cuarta*, leaving just four journalists to write a web version of the paper. *La Tercera* is now only printed at the



weekend and in certain regions. *Capital*, a magazine, also stopped printing. Most publishers hope audiences will migrate to digital equivalents.

There will be several elections in 2021, some with more than one round. Critical positions are up for election, including the president, parliamentarians, mayors, and governors, but also the drafters of a new constitution, the development of which arose out of the social protests. Coverage of complex issues with a multitude of candidates will be a daunting task for the media.

To help voters choose, some media, including CNN Chile, 24horas.cl, *La Tercera*, and some independent sites, are inviting users to take surveys which will, they say, provide an indication of which candidates they will have more affinity with.

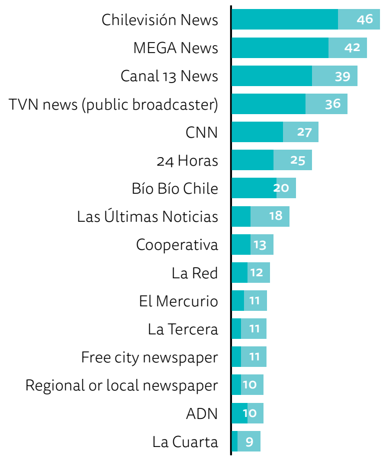
Francisco Javier Fernández Medina and **Enrique Núñez-Mussa,**
Pontificia Universidad Católica de Chile

WEEKLY REACH OFFLINE AND ONLINE

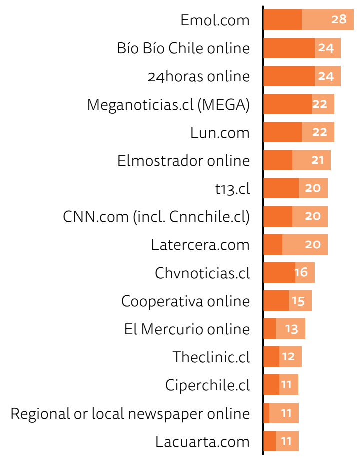
TOP BRANDS
% Weekly usage

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

TV, RADIO AND PRINT



ONLINE



CHANGING MEDIA

Television was an important source of news during the COVID-19 crisis, but social media are equally popular as a way of finding and consuming news in Chile. Newspaper readership continues its sharp decline in line with global trends.

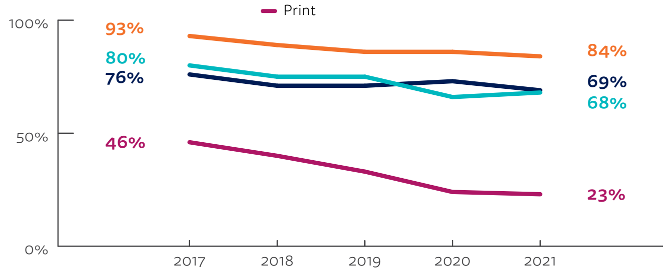
12% PAY

pay for **ONLINE NEWS**

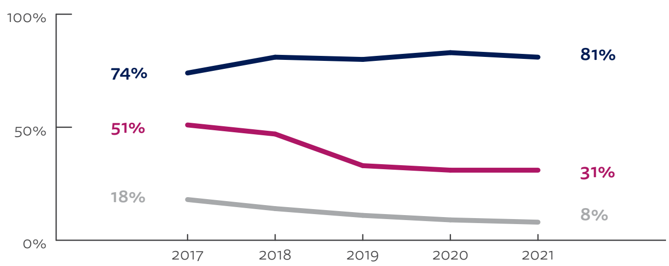
35%

listen to **PODCASTS** in the last month

SOURCES OF NEWS 2017–21



DEVICES FOR NEWS 2017–21



TRUST

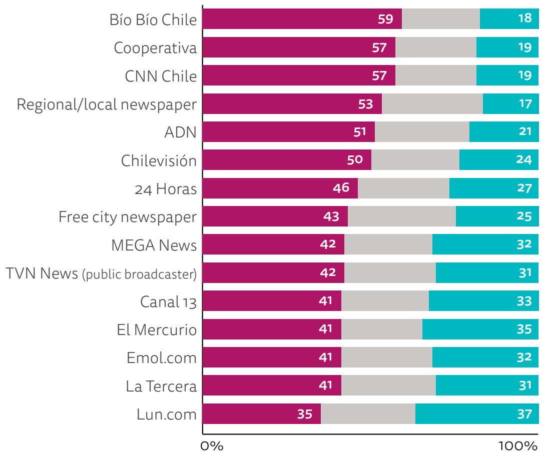
Although overall trust (36%) has increased, it remains low by international standards and still more than ten points lower than before Chile's recent social protests. Falling trust in the news found in social media (32%) can be explained by a growing awareness of misinformation in such platforms, added to greater dependence on official government information about COVID-19 that has been broadcast daily and live on TV and radio.

DIFFERENT TYPES OF TRUST

News overall	News I use
36% (+6) =33/46	**39%**

News in search	News in social
36%	**32%**

BRAND TRUST SCORES



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

48%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	54%	(-9)	78%
2	WhatsApp	36%	(-4)	84%
3	Instagram	27%	(-1)	60%

Rank	Brand	For News		For All
4	YouTube	24%	(-3)	75%
5	Twitter	19%	(-3)	31%
6	Facebook Messenger	9%	(-5)	39%

COLOMBIA

STATISTICS

Population	49m
Internet penetration	63%

The difficult implementation of the peace process between FARC guerrillas and the government, which ended more than 50 years of conflict, has, along with social protests and COVID-19, dominated the news. The pressures of the pandemic have accelerated the digitisation of newspapers and magazines.

Coronavirus disrupted Colombia's printing industry, with distribution networks being affected by lockdowns. Many people were not willing to buy or receive papers in public places. Some regional papers, like *El Mundo* from Medellín, stopped printing for financial and logistical reasons, but others, including *El Espectador* and *El Tiempo*, began sending subscribers print editions in bags as a COVID-19 preventive measure. Free newspapers like *Publimetro* suspended printing and launched PDF editions together with social media content distribution campaigns to retain traditional advertisers in digital formats.

Traditional news publishers like *El Tiempo*, *El Espectador*, and *Semana* magazine, which had been already struggling with their business models, introduced or tightened their paywalls to compensate for shrinking income.

Colombian media has historically been dominated by publishers and broadcasters with strong ties to the political and business elites. That influence seems to be transferring to the digital world, but new players and social media are clearly changing consumption trends.

Online and TV news consumption increased hugely as people looked for information about the pandemic, but this interest has not been converted into advertising income because advertising budgets have been reduced by economic contraction.

Specialist niche digital native media such as El Paciente Colombiano, Conversemos de Salud, and La Silla Vacía, took the opportunity to provide detailed health and science coverage. But more generalist media struggled to report on COVID-19 because of a lack of specialists in their newsrooms. A tendency to politicise public issues did not help either.

False information about COVID-19 and vaccines on social media has been a concern. Traditional media have been collaborating on editorial initiatives to counter misinformation, reinforcing the idea that they are trustworthy sources. For instance, 'Vera, the Voice of Truth' is a series of radio spots produced by a conglomerate of stations, featuring the metallic tone of a female bot who corrects misinformation (and embodies the social responsibility of traditional radio stations).

Google and Facebook strengthened alliances with digital native media like La Silla Vacía and Colombiacheck to spot and correct misinformation about the pandemic. Facebook reached an agreement with the Colombian government and the World Health Organisation (WHO) to tackle fake COVID-19 news, adding a link in Colombians' newsfeeds to official Ministry of Health information.

The most common forms of misinformation claim 'miraculous cures', promote hazardous treatments, and undermine vaccines. But there are also plenty of politically motivated distortions about lockdown plans. The scale of coverage of the pandemic, along with the social protests and peace process implementation, have led to some signs of waning public interest in these issues, but both will probably get fresh momentum with the approach of presidential elections in 2022.

Audiences still turn to TV as the main traditional information provider during long lockdowns – Caracol TV (59%) is by far the top brand for traditional sources weekly. But this surge in TV viewing may drop once the country returns to normality.

The *El Tiempo* newspaper website is by far the most used news site (40%), followed by the online versions of *El Espectador* and Caracol TV (27%). But some digital native media are growing in importance. For example, Las2Orillas offers alternative news, emphasising social inequalities, and publishing stories written by its users (Nota ciudadana or Citizens' stories). Conversely, Pulzo, the main news aggregator, has a business model based on clicks and advertising, with an audience mostly under 35. The majority of its content comes from other national and international media.

There is very high mobile use in Colombia, with more than eight out of ten respondents using mobile phones for news consumption. In this (online) survey, online sources stand out as people's main source of information (87%), outperforming traditional media like TV (58%) and print (24%). Facebook (67%) and WhatsApp (45%) are the main social networks to get news.

Mobile internet is dominant here, thanks to competition between networks, low levels of fixed line internet access in some areas, and government programmes that have encouraged its use. Higher concentrations of connectivity in urban areas compared to rural ones and security pose challenges for the future.[94]

Víctor García Perdomo
Universidad de La Sabana

[94] GSMA, 'Country Overview: Colombia' (2020). https://data.gsmaintelligence.com/api-web/v2/research-file-download?id=28999732&file=Country%20overview%20Colombia.pdf

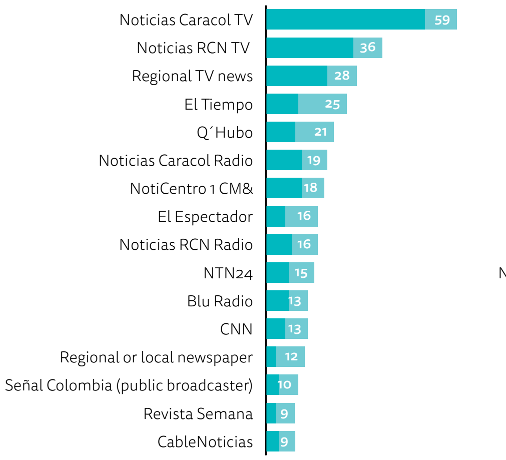
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

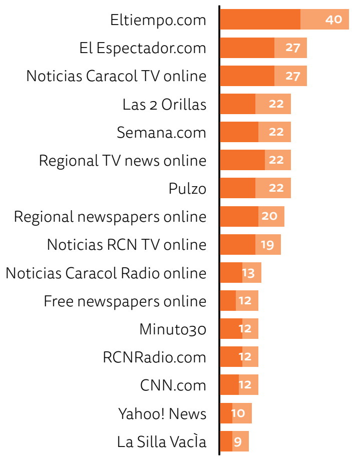
% Weekly usage

- 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

Smartphones have been widely adopted in Colombia and, for many, they are now the main or only access point for the internet and internet news. Social media news use (70%) is also amongst the highest in our survey.

PAY

15% pay for **ONLINE NEWS**

SOURCES OF NEWS

TV **58%**

Online (including social media) **87%**

Print **24%**

Social media **70%**

DEVICES FOR NEWS

Computer **39%**

Smartphone **83%**

Tablet **7%**

TRUST

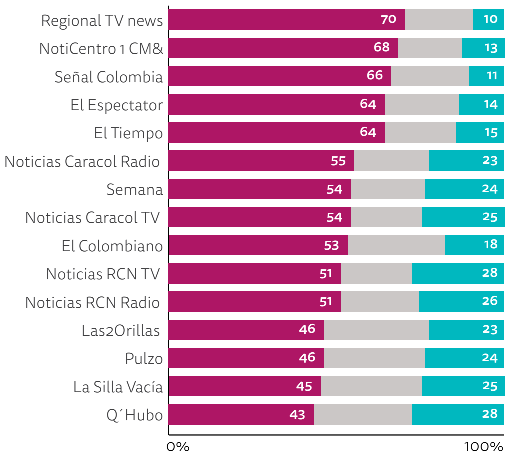
Regional TV news channels such as Citytv, TeleAntioquia, and TeleCaribe showed the highest levels of trust (70%) in our survey among news providers – perhaps because they are closer to communities and their issues – followed by CM& and public broadcaster Señal Colombia. RCN TV and RCN Radio, which support right-wing politics, and *Q´Hubo*, a tabloid news brand, have higher levels of *mis*trust.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
40% =26/46	**45%**
News in search	*News in social*
42%	**36%**

BRAND TRUST SCORES

Trust / Neither / Don't trust



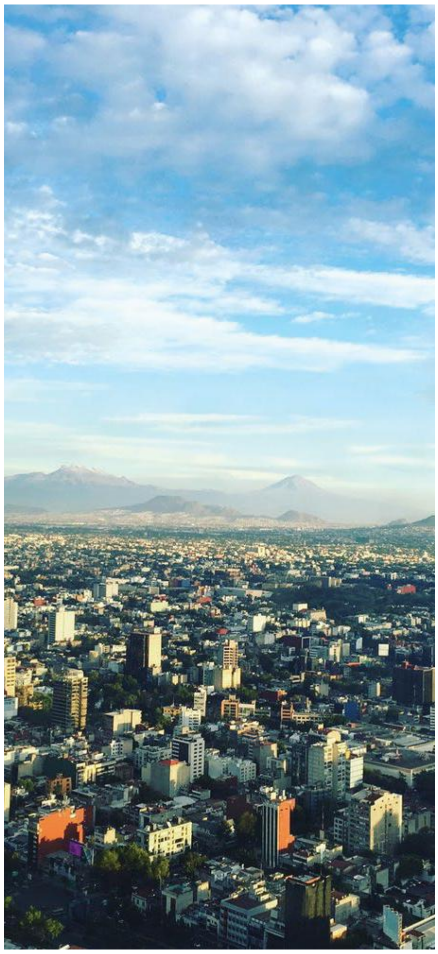
Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

51% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	67%	84%
2	WhatsApp	45%	86%
3	YouTube	34%	79%
4	Instagram	28%	60%
5	Twitter	18%	30%
6	Facebook Messenger	14%	46%

MEXICO



STATISTICS

Population	**131m**
Internet penetration	**65%**

On top of all the problems facing the media in Mexico – a polarised society, economic contraction, COVID-19 – there are also frequent attacks from a populist president who accuses the media of unfair coverage and corruption. The president is getting more popular, and people are trusting the media less.

Every day at 7am, the President of Mexico, Andrés Manuel López Obrador (also known as AMLO), holds a press conference. Broadcast live, the mañeneras – morning briefings – give the president the opportunity to address the nation. Often, journalists who challenge him find themselves on the end of a verbal bashing. He prefers to take questions from what he refers to as 'blessed social networks' or from sympathetic fringe characters such as a bowtie-wearing YouTuber.[95]

López Obrador enthusiastically uses YouTube to connect with voters on social media, going over the heads of the traditional media, parts of which he accuses of having acted as propagandists for his predecessors.[96] His own government has, however, been generous in its state advertising for supportive outlets.

The approach is working for the president, whose popularity – around 50% at the time of writing – is arguably one of the highest figures in the history of Mexico. An economic nationalist who comes from the left, he espouses equality, vilifies the intelligentsia and appeals to the largest, lower income, segments of society. Combined with his aggressive tone towards those who question him, the approach has echoes of Trump and Bolsonaro. Like them, his handling of COVID-19 has been criticised, in his case for low rates of testing, mask avoidance, and a slow vaccination roll-out.

The president's attacks could be one reason for falling trust in the media among Mexicans – this is just one of a handful of countries in this year's survey to see declining figures.

Though by no means alone in seeing its trust figures falling, digital-native news brand Aristegui News saw the biggest drop in confidence, perhaps as a result of the attacks by the president and his government on publications with greater political influence. In our 2019 report we noted that brands which seemed to have an affinity with the then new president, including Aristegui, might have been expecting to benefit from higher trust levels. That has not happened.

Another reason, though, could be the spread of false and misleading information. In our survey, 69% said they had seen false or misleading information about Coronavirus and 52% about politics in the preceding week – both figures are considerably higher than the all-market average.

Social networks and messaging apps are widely used in Mexico for news, especially by lower educated groups. When it comes to spreading misinformation, people say they are most concerned about the role played by Facebook (28%), followed by messaging apps such as WhatsApp (26%), news websites (15%), search engines (7%), YouTube (6%), and Twitter (4%).

It was hoped that the election of López Obrador would see a reduction in violence against journalists, but things have not improved. In just a few days in 2020, three journalists were shot dead, taking the year's tally to nine. At least 120 journalists have been killed since 2000.

The established media face audience polarisation, declining advertising revenue, and the need to respond to digital shifts in consumer habits. Digital-born competition has blossomed in the past decade as consumers have discovered a rich variety of content offers and formats. UnoTV, part of Carlos Slim's América Móvil, which began life by sending news via SMS and grew into an influential news website, is perhaps the most successful. Nevertheless, traditional TV and radio are still the most popular media overall and receive the most advertising revenue. Traditional press continue to play an important role.

Many news outlets launched dedicated editorial sections and even webinars to cover the pandemic. Most were offered for free, and even the websites of traditional newspapers such as *El Economista* and *El Financiero* lowered their paywalls. The news industry was not included in the government's financial support to businesses facing the impact of COVID-19, one element of which was a further decline in advertising.

The virus has not derailed the president. An undersecretary responsible for COVID prevention faced criticism when he said that, if the president had been a carrier of the virus, he could not infect more people because of his moral strength. For his part, the president said he would 'put on a mask when there is no corruption'.

María Elena Gutiérrez-Renteria
Universidad Panamericana

[95] https://www.chicagotribune.com/espanol/sns-es-prensa-en-tiempo-de-amlo-mananeras-acoso-y-violencia-20200918-qppwgd2hhbhtvk5nhvhvtjxixa-story.html
[96] https://www.informador.mx/mexico/AMLO-acusa-amarillismo-en-los-medios-de-comunicacion-20210312-0036.html

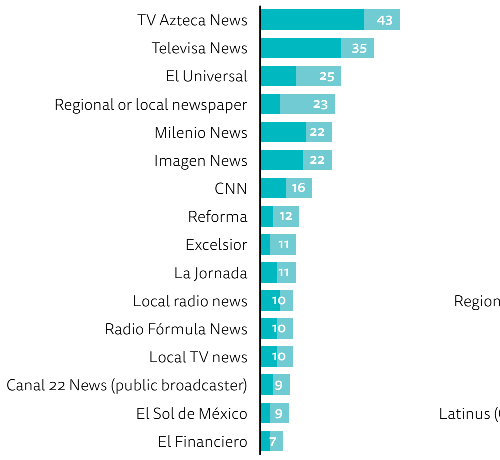
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

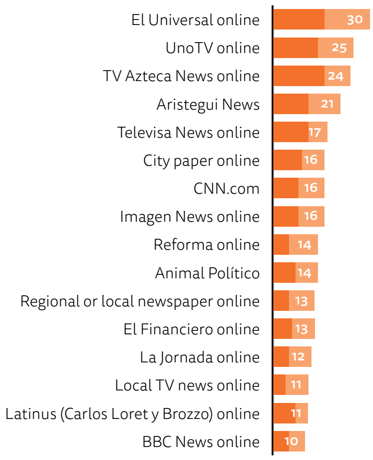
% Weekly usage

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

TV, RADIO AND PRINT



ONLINE



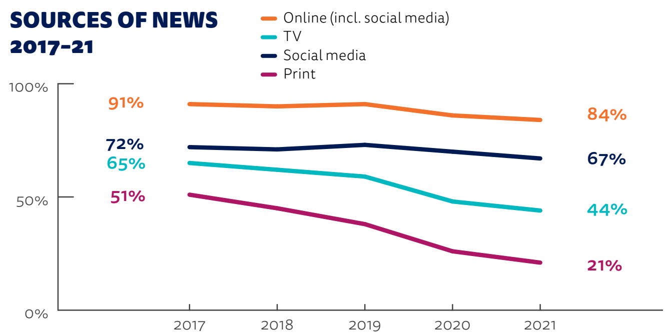
CHANGING MEDIA

Online and social media remain the most popular sources of news in Mexico with our predominantly urban sample. TV and radio remain important to reach the millions of people who are not online. The majority of internet news access is now via smartphones (79%) rather than computers or tablets.

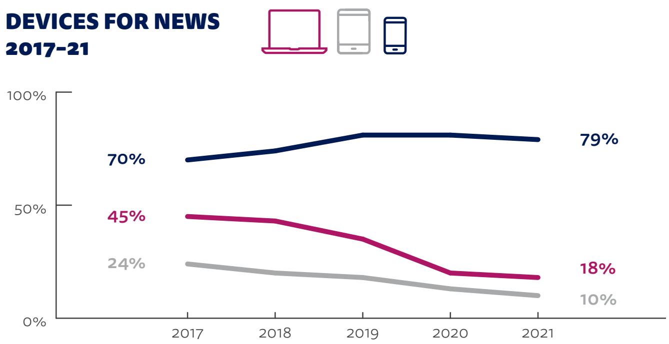
18% PAY

pay for **ONLINE NEWS**

SOURCES OF NEWS 2017–21



DEVICES FOR NEWS 2017–21



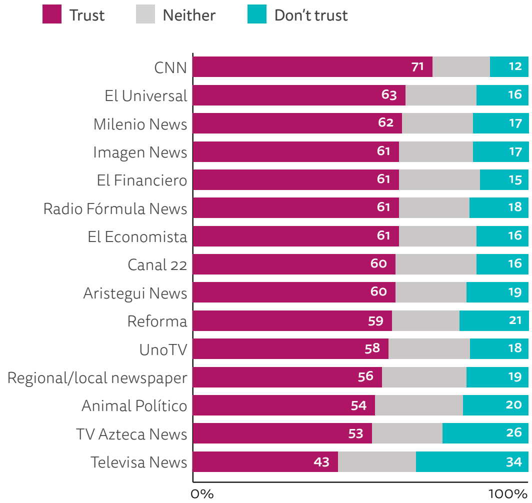
TRUST

Trust in the news is low by international standards, partly due to repeated attacks from the president. International broadcaster CNN is the most trusted brand in our survey. But two of the most popular domestic television news channels, TV Azteca and Televisa news, are least trusted – reflecting polarised attitudes to much of the media.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
37% (-2) 32/46	**43%**
News in search	*News in social*
40%	**35%**

BRAND TRUST SCORES



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

49%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	60% (-10)	80%
2	YouTube	37% (-7)	80%
3	WhatsApp	35% (-4)	82%

Rank	Brand	For News	For All
4	Twitter	17% (+2)	32%
5	Facebook Messenger	15% (-5)	51%
6	Instagram	13% (-)	42%

PERU

STATISTICS

Population	**33m**
Internet penetration	**68%**

The combination of the pandemic, political instability, and protests has severely affected the media in Peru. Significant job losses throughout the country, and a record number of journalists killed by COVID-19, point to a difficult recovery.

Faced with one of the strictest lockdowns in South America, newspapers stopped printing and it was months before many of them returned to the streets. The fall in advertising has meant that some important papers, such as *La República*, have been slow to return to full printed daily editions.

The National Association of Journalists (ANP) reported more than 500 layoffs as of October 2020[97] and other estimates, based on tax records, suggest that number – including all related media positions – could reach 2,000. Many jobs are not expected to return after the pandemic. The El Comercio Group, the most dominant news operation in the country, led with 300 layoffs, including 100 journalists, followed by La República Group with 50 layoffs. Both groups and others have fired most of their correspondents in the interior regions. El Comercio Group also closed the free newspaper *Publimetro* and ended the print edition of *El Bocón*, a 26-year-old sports newspaper.

In addition, ANP recorded 135 journalists killed by COVID-19 in 2020,[98] one of the largest numbers of journalist deaths in the world. Most of them (80%) lived outside the capital, Lima, demonstrating the precariousness of the working conditions of journalists, who often operate independently. Regional and local radio and TV stations reported losing income for advertising[99] and cut programming time and staff, and temporarily or permanently closed some operations. Regional broadcasters did not benefit from government stimulus programmes, unlike the large media groups, but were able to get some relief by taking part in 'Aprendo en Casa' a state-run home-schooling initiative. Election advertising has also helped some publishers, but it provides temporary relief that might not be enough to save some media operating in remote areas.

There were also high numbers of attacks on the press. The most prominent ones were recorded during street protests in November following the removal of President Martín Vizcarra by Congress, and the subsequent swearing in of Manuel Merino, the head of Congress. More than 40 journalists reported physical attacks and detentions, mostly by police forces who are also considered responsible for the death of two protesters. After a week of protests, peace was restored after Merino's resignation and the installation of an interim government led by Francisco Sagasti.

Young people are credited with the success of the demonstrations, even though they were not previously politically organised. Live video was shared on social platforms including, for one of the first times in a protest, TikTok, where influencers with more than 1,000 followers were able to stream live. There were tutorials shared on social media on how to neutralise the effects of tear gas, and videos sharing the location of medical and nursing students offering first aid and law students offering legal help. Several traditional and digital media operations also joined the platform, and Peru now ranks fourth among the countries in this survey for TikTok usage – 26% of participants use it for any purpose and 7% specifically for finding, sharing, or consuming news.

As in many other countries, access to news via the digital media is consolidating. Among those surveyed, social media is the most popular way to access news (70%), higher than both TV (63%) and print (28%). Smartphones were the main way of accessing the news – with 80% weekly use. Digital versions of traditional newspapers, such as *El Comercio* and *La República*, are still leaders in online readership, but they are being challenged by digital offerings of radio stations – especially RPP News which also ranks higher in trust – and digital-native news outlets. Investigative sites IDL-Reporteros and the member-funded OjoPúblico appeared in the top 15 outlets ranking in trust and readership.

The decline in traditional broadcasting increases the risk of news deserts developing, especially in interior areas which relied heavily on local media for information about the Coronavirus and politics. Though digital outlets informally report large rises in audiences, relatively low internet penetration in Peru (68%) means access will not be shared universally.

Lourdes M. Cueva Chacón
San Diego State University

97 International Federation of Journalists, 2020. https://www.ifj.org/media-centre/news/detail/category/latin-america/article/peru-163-periodistas-fallecidos-y-500-despedidos-durante-la-pandemia.html
98 ANP (Asociación Nacional de Periodistas del Perú), 2020. https://www.facebook.com/ANPgremiodelaprensaperuana/posts/3772350269523201
99 http://www.concortv.gob.pe/wp-content/uploads/2021/02/Informe-Final-Radio-y-TV-COVID-19-.pdf

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

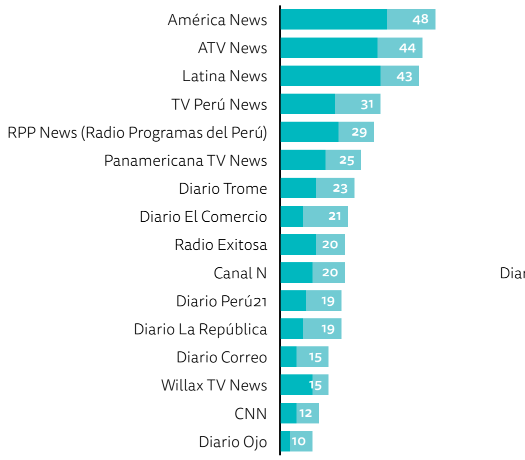
Weekly use
TV, radio & print

More than 3 days per week
TV, radio & print

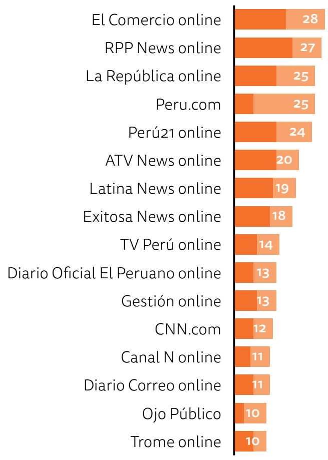
Weekly use
online brands

More than 3 days per week
online brands

TV, RADIO AND PRINT



ONLINE



CHANGING MEDIA

Online and social media remain the most popular sources of news in Peru with our more urban sample. TV and radio remain important for the millions of people who are not online. The majority of internet news access is now via smartphones (80%).

PAY

16% pay for **ONLINE NEWS**

SOURCES OF NEWS

TV **63%**

Online (including social media) **85%**

Print **28%**

Social media **70%**

DEVICES FOR NEWS

Computer **22%**

Smartphone **80%**

Tablet **7%**

TRUST

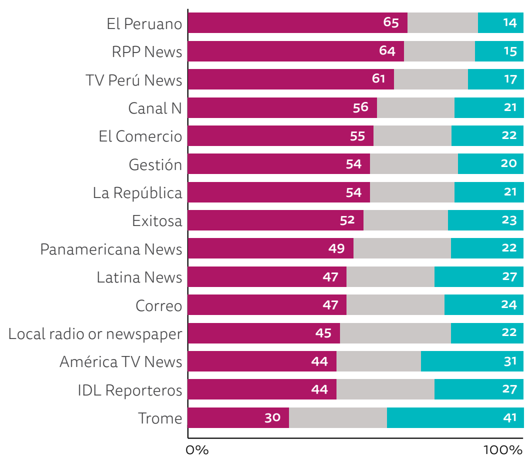
Four out of ten respondents trust the news overall, slightly higher for sources people use themselves. State-run media, *El Peruano* (newspaper) and TV Perú News, rank highly for trust – even though the government itself is not often trusted. The need to access official information during the pandemic could explain this phenomenon.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
40% =26/46	**43%**
News in search	*News in social*
42%	**37%**

BRAND TRUST SCORES

Trust / Neither / Don't trust



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

52% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	69%	84%
2	WhatsApp	42%	80%
3	YouTube	35%	78%

Rank	Brand	For News	For All
4	Instagram	18%	48%
5	Facebook Messenger	18%	50%
6	Twitter	13%	23%

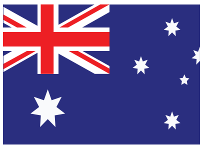
SECTION 3

Analysis by Country and Market
Asia Pacific

AUSTRALIA

STATISTICS

Population	**26m**
Internet penetration	**86%**



2020 was one of the toughest years in the Australian news media's history. More than 150 news titles were closed or suspended[100] – in part as a response to COVID-19. Australia was also in the spotlight because of government moves to introduce a mandatory 'news media bargaining code' as a way of resetting the relationship between tech platforms and journalism.

COVID-19 provided the trigger for a radical round of redundancies and closures in the Australian news industry. Leading the job losses is Australia's largest news company News Corp Australia, which suspended the print editions of 112 suburban and regional mastheads, axing almost 1,000 jobs. News Corp reported a 22% decrease in revenue in the 2019–20 financial year. In April, Australian Community Media, which owns 160 regional newspapers including the *Canberra Times* and the *Newcastle Herald*, suspended non-daily print editions and shut down four printing sites.

Much of this upheaval predates COVID-19, but the pandemic prompted an acceleration of trends established by the industry's decades-long struggle to replace falling advertising revenue. With print only being used by less than one-fifth of Australians as a source of news it has been particularly hard for the newspaper and magazine businesses.

Those pressures impacted on the newswire service, Australian Associated Press (AAP), which was slated for closure in February 2020 (before COVID-19 hit) after its major shareholders Nine and News Corp decided it was no longer commercially viable. However, it was thrown a lifeline by a group of philanthropists and investors led by former Foxtel boss Peter Tonagh and is still in operation.

With a diversified portfolio including print and online publishing, Seven West is the second largest commercial TV network in Australia. In May 2020, they sold Pacific Magazines to Bauer Media Group. The AU$40 million deal was approved by the Competition Authority, but the deal coincided with the pandemic, leading to mass job cuts and the closure of many titles including *NW*, *OK!*, *Harper's Bazaar*, and *Elle*.

It is not all gloom and doom. While our figures show a continuation of Australia's modest level (13%) of people paying for news online, there has been a flurry of new start-up news organisations and new online mastheads during the pandemic. News Corp started to publish digital-only news in major centres of regional Victoria, New South Wales, and South Australia. In regional towns, community-based newspapers have emerged, particularly in places where existing newspapers had been closed. A few short-term COVID-19 relief packages have been offered from the government, including an AU$50 million public interest news-gathering programme (PING). The Australian Communications and Media Authority also supported small and regional publishers with AU$5m of innovation funding.

Public broadcaster ABC had a mixed year. It was already anticipating implementing more than 200 job cuts, of which 70 came from the news division, due to a funding freeze by the federal government imposed prior to the pandemic. As a result, signature programmes such as 7:45am, ABC radio news bulletins and *ABC Life* were discontinued. But as with some other public broadcasters, the pandemic seemed to boost ABC's audiences. Our survey shows ABC consolidating its position as the leading offline source, overtaking News.com.au in online reach, and opening up a bigger gap with other providers – while remaining the most trusted Australian news brand.

On the political front, there have been policy changes that will affect the Australian and global news industries for years to come. The Australian Competition and Consumer Commission published its far-reaching Digital Platforms Inquiry report in December 2019. The report urged strong action by the government to regulate the operations of large digital platforms such as Facebook and Google. After much discussion, a major outcome was the passing into law of the world's first News Media and Digital Platforms Mandatory Bargaining Code in March 2021. This encouraged a swathe of deals between media companies and Google and Facebook, which Rod Sims, Australia's competition regulator, estimated as being worth A$100m ($77m) annually to journalism[101] (the deals are private, so no details are publicly available). Whether these deals are enough to solve the industry's problems is unclear but they should help. Another outcome was the development of the voluntary Australian Code of Practice on Disinformation and Misinformation, which has been adopted by Twitter, Google, Facebook, Microsoft, Redbubble, TikTok, Adobe, and Apple in Australia.

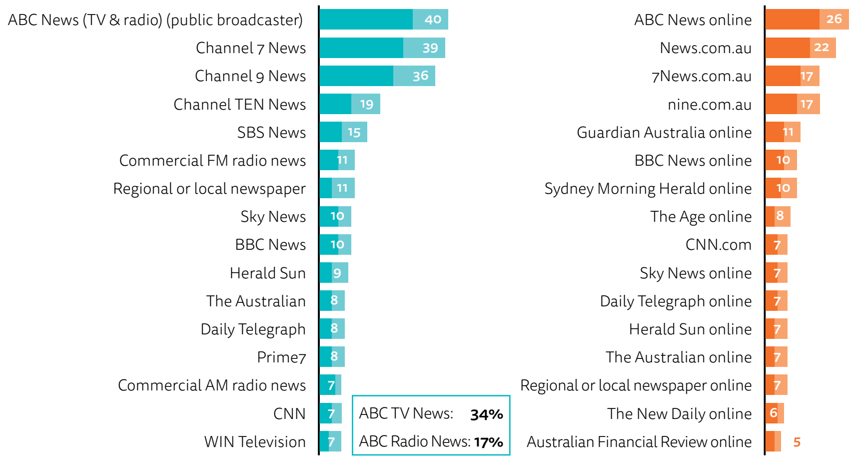
Sora Park
News and Media Research Centre, University of Canberra

[100] Public Interest Journalism Initiative, 'Newsroom Changes January 2019–March 2021', The Australian Newsroom Mapping Project (2021). https://anmp.piji.com.au/
[101] Murphy, H., Smith, J. 'Facebook Agrees to Pay News Corp for Content in Australia', *Financial Times*, 15 Mar. 2021.

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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



CHANGING MEDIA

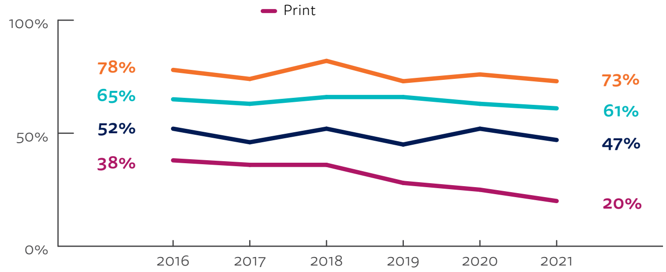
News access has been declining overall in recent years, with print declining by 16 percentage points since 2018. Mobile devices continue to increase as a source of news, with 62% accessing news on their smartphones each week.

PAY

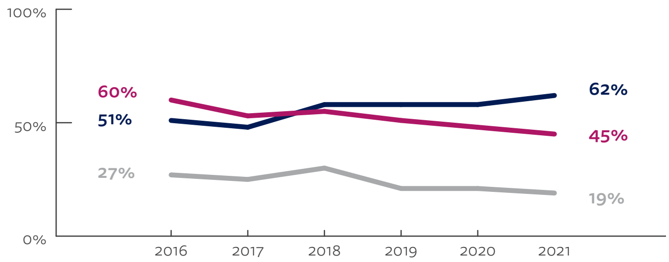
13% pay for **ONLINE NEWS**

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

SOURCES OF NEWS 2016–21



DEVICES FOR NEWS 2016–21



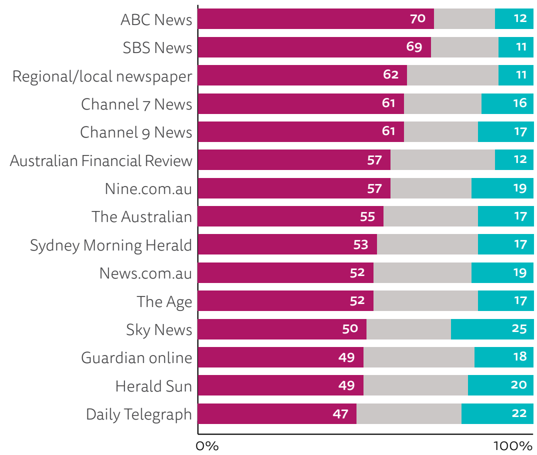
TRUST

Trust in news is up by five percentage points, placing Australia in the mid-range among the 46 countries. This improvement reflects the trend for greater reliance on the news media in a crisis. The Australian news media have been particularly active in disseminating official health advice during the pandemic.

DIFFERENT TYPES OF TRUST

News overall	News I use
43% (+5) 21/46	**49%**
News in search	**News in social**
31%	**18%**

BRAND TRUST SCORES



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

27% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

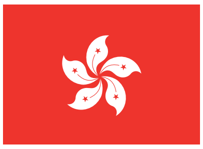
Rank	Brand	For News		For All
1	Facebook	33%	(-6)	67%
2	YouTube	20%	(-1)	61%
3	Facebook Messenger	11%	(-1)	51%

Rank	Brand	For News		For All
4	Instagram	10%	(+1)	37%
5	WhatsApp	9%	(+1)	29%
6	Twitter	9%	(-1)	18%

HONG KONG

STATISTICS

Population	**7.5m**
Internet penetration	**89%**



A new National Security Law has deepened already serious concerns about diminishing press freedom and editorial independence in Hong Kong. This follows a challenging time for the news media in reporting prolonged citizen protests amid a major health pandemic.

The National Security Law was unilaterally imposed on Hong Kong by China in June 2020, raising concerns that new sweeping police powers can be used against journalists and news media organisations under the guise of law violations against 'secession', 'subversion', 'terrorism', and 'collusion with foreign forces'. Of particular concern was the broad nature of the definitions, such that giving airtime to a foreign critic of China or interviewing a proponent of Hong Kong independence could be construed as violating the law.

Indeed, soon after the law's enactment the owner of the pro-democracy *Apple Daily*, Jimmy Lai, was arrested for alleged collusion and over 100 police officers raided the office of the newspaper. Moreover, some overseas journalists had their visa applications delayed or rejected without explanation. Most notably, the Hong Kong Immigration department rejected the visa application of *New York Times* correspondent Chris Buckley, who had earlier been expelled from China. This led to the newspaper's decision to relocate a third of its Hong Kong staff to Seoul, South Korea, as executives cited the uncertain environment posed by the new law.

The policing and on-the-ground reporting of the Anti-Extradition Law protests (2019–20) had earlier exposed tensions between journalists and the authorities. From one side the police chief expressed concerns about suspected 'fake reporters' who allegedly obstructed and even attacked the police at protest sites.[102] From the other, journalists pointed to instances of being pepper-sprayed and police officers displaying reporters' ID cards in front of live cameras. The police announced, in September 2020, their revised definition of 'media representatives' to encompass only those affiliated with media outlets registered with the Hong Kong government – as well as internationally recognised and 'reputable' overseas media. Ostensibly this was to allow frontline police officers to quickly verify the credentials of journalists, but press groups argued that this was *de facto* accreditation of media professionals by a government entity that unfairly prejudiced against freelancers, student reporters, and emerging online media.[103]

Some media professionals were not spared from the politically charged and frequently violent nature of the protests. Around 20 staff from the *Apple Daily* had their personal information revealed on an anti-protest website (a tactic known as doxxing). There were also instances where protesters harassed reporters and camera crews from news outlets perceived to be pro-government.

The impact of Coronavirus exacerbated the already severe economic environment for the news media. The largest pay TV operator i-Cable laid off 40 staff from the news department, which led to further resignations in protest – although the company made a commitment not to make more cuts for two years. Bought by tech giant Alibaba in 2015, the English-language daily *South China Morning Post* (*SCMP*) instituted three weeks unpaid leave for all staff and cut the salaries of top management. Faced with declining ad revenue, both the *Apple Daily* and *SCMP* introduced paywalls, while popular independent online news outlets such as Citizen News and Stand News rely on donations.

Despite these challenging conditions, Hong Kong's news media continue to attract capital from business interests in China, which held direct control or stakes in nine of the 26 mainstream media outlets in 2017.[104] This has increased further following the purchase of Hong Kong's oldest local Chinese-language paper, *Sing Tao Daily*, by the daughter of a real-estate tycoon in 2021.

Hong Kong's only public broadcaster Radio Television Hong Kong (RTHK) continues to be embroiled in controversies. In one instance the popular satirical show *Headliner*, which first aired in 1989, was suspended indefinitely after RTHK was reprimanded by the regulatory body because of the show's negative depiction of the police. The release of a recent government report criticising RTHK's management in February 2021[105] and the installation of a new head in March 2021 who had no previous broadcasting experience suggest that the Hong Kong government is taking steps to rein in the editorial independence of the public broadcaster.

While its 80th ranking in the 2021 World Press Freedom Index[106] far exceeds China's 177th rank, this still marks a precipitous decline from its 18th position in 2002.

Michael Chan, Francis Lee, and **Hsuan-Ting Chen**
Chinese University of Hong Kong

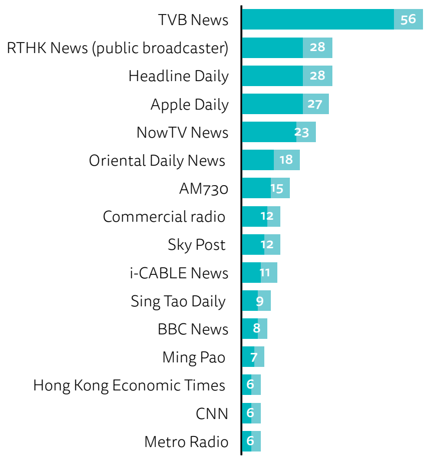
[102] Police Act on 'Fake Reporters', https://www.thestandard.com.hk/section-news/section/11/223220/Police-act-on-'fake-reporters'
[103] 'FCC [Foreign Correspondents Club] Expresses Solidarity with Press Organisations Following Hong Kong Police Revision of Media Definition Reports', https://www.fcchk.org/fcc-expresses-solidarity-with-press-organisations-following-hong-kong-police-revision-of-media-definition-reports/
[104] Lee, Francis L. F. 2018. 'Changing Political Economy of the Hong Kong Media', *China Perspectives*, 2018/3. https://journals.openedition.org/chinaperspectives/pdf/8009
[105] Police Commerce and Economic Development Bureau, *The Governance and Management of Radio Television Hong Kong Review Report* (Hong Kong: Government of Hong Kong Special Administrative Region, Feb. 2021). https://www.cedb.gov.hk/ccib/en/consultations-and-publications/reports/rthkreview.pdf
[106] Erosion of Press Freedom, https://rsf.org/en/hong-kong

WEEKLY REACH OFFLINE AND ONLINE

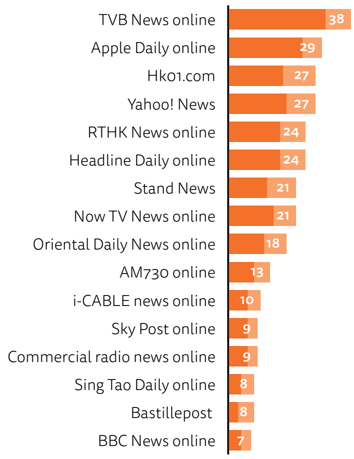
TOP BRANDS
% Weekly usage

- 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

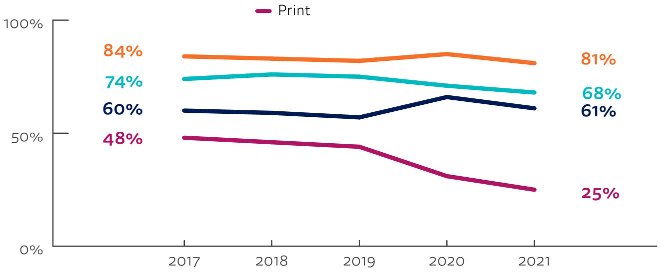


CHANGING MEDIA

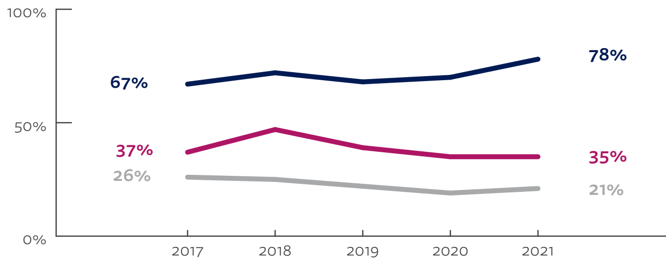
Usage of all types of sources dropped in 2021, probably because the 2020 survey registered unusually high levels of news consumption during the Anti-Extradition Bill protests. The decline in print media usage is particularly striking.

23% pay for **ONLINE NEWS**

SOURCES OF NEWS 2017–21



DEVICES FOR NEWS 2017–21



TRUST

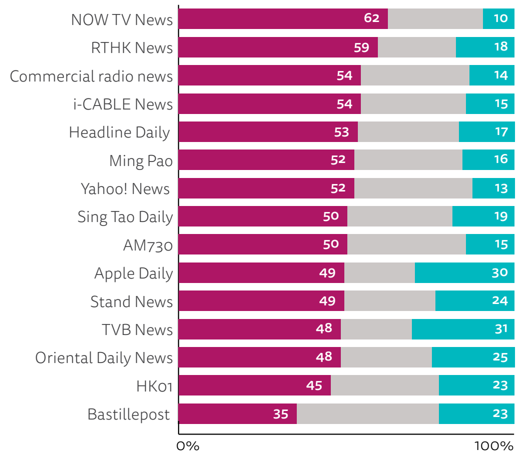
As social protests and the pandemic subsided, the information environment also became less contentious, and fake news and rumours were relatively less frequently shared. This might explain an increase in overall trust in the news as well as trust in 'the news I use', 'news in search', and 'social media'.

DIFFERENT TYPES OF TRUST

News overall	News I use
40% (+10) =26/46	45%
News in search	**News in social**
26%	22%

BRAND TRUST SCORES

Trust / Neither / Don't trust



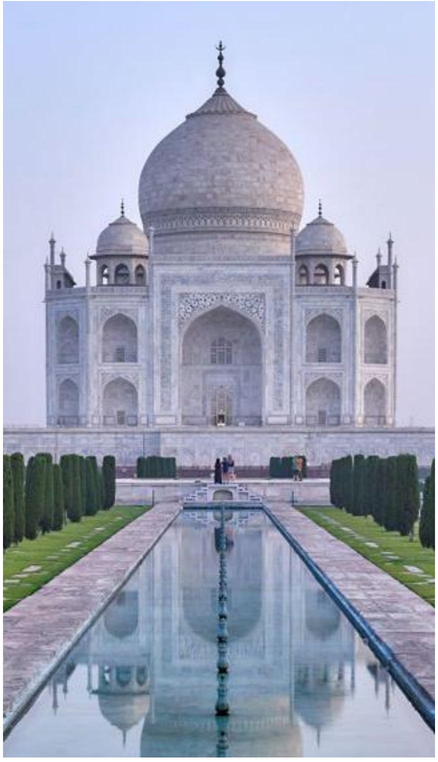
Trust = % scored 6-10 on 10-point scale. Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded. Only the above brands were included in the survey so should not be treated as a list of the most trusted brands.

40% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All	Rank	Brand	For News		For All
1	Facebook	49%	(-9)	76%	4	Instagram	14%	(-2)	39%
2	WhatsApp	36%	(-14)	83%	5	WeChat	13%	(-3)	47%
3	YouTube	36%	(-3)	73%	6	Facebook Messenger	7%	(-3)	30%

INDIA



STATISTICS

Population	**1400m**
Internet penetration	**54%**

Indian media are extremely diverse, with thousands of outlets operating in multiple languages. Much of the media is controlled by large, for-profit corporations, many of them privately held, and mainly funded by advertising. But these business models are being disrupted by a rapid shift to online consumption – and the impact of COVID-19.

Legacy print news brands, including the most popular in the survey – *Times of India*, *Hindustan Times*, and *The Hindu* – and newspapers in general, have borne the brunt of the slowdown. The pandemic has hit print circulation and decreased advertisements, leading companies to slash salaries, cut jobs, and close editions across the country due to the drastic decline in economic activity in one of the world's strictest lockdowns. The industry has also had to cope with reduced government and commercial advertisement spending,[107] which fell by more than half since the start of the pandemic. Leading news channel NDTV announced salary cuts for a time, while digital born-operator The Quint furloughed staff and was forced to close its planned TV division after three years' unsuccessful attempts to get a broadcasting licence.

Despite the growing popularity of digital media with our surveyed audience, which tends to lean towards an urban and educated population, television remains the most popular source overall. India has altogether 392 news channels, dominated by regional language channels and private players. Broadcast television channels, like print media in India, are self-regulated and often have strong political affiliations and corporate ownership, with no regulations on cross-media ownership. A culture of 24×7 news channels operating on 'breaking news' models and polarised debates often distort and sensationalise news.

In October last year, news channels faced a credibility crisis as their Television Rating Points (TRPs) published by the Broadcast Audience Research Council (BARC) came under scrutiny. Republic TV and two Marathi entertainment channels were accused by the Mumbai police of tampering with metering devices installed in selected sample households to boost their ratings. Despite these accusations, the considerable popularity enjoyed by Republic TV's online and offline platforms – which have both increased considerably since our last survey in 2019 – perhaps indicate the growing popularity of right-wing ideology propagated by the ruling party in India.

India is one of the strongest mobile-focused markets in our global survey, with 73% accessing news through smartphones and just 37% via computer. India has more than 600 million active internet users, many of whom access the internet only through mobile phones – aided by low data charges and cheap devices.

Among our respondents, WhatsApp, YouTube, and Facebook are widely used for news and there have been serious problems with misinformation and hate speech. Individual members of the ruling BJP and groups aligned with the party are alleged to systematically spread false and misleading information via social media and other platforms.[108] In late 2020, Facebook India's policy head resigned after accusations that the company deliberately took a lenient line on ruling party supporters who allegedly violated hate speech rules with anti-Muslim posts.[109] In response, the number of independent fact-checking organisations has grown in recent years, with support from international tech companies and foundations, while mainstream media organisations have formed dedicated fact-checking and debunking teams.

With the growing popularity of online platforms, the Indian government has come up with controversial new proposals to expand the scope of existing legislation to social platforms, news websites, and Over the Top (OTT) content providers. In an apparent step to limit false and objectionable information on social media platforms, new guidelines expect platforms to trace the origin of information that can be misleading or objectionable based on an order from a court or competent authority. Authorities have on several occasions asked platform companies to block posts, including those by activists, journalists, and opposition politicians.

DigiPub, a group of digital news organisations formed in 2020, says these rules go against the 'fundamental principles of news', giving control to the government to remove news content online. India has consistently slipped in the Press Freedom Index of Reporters Without Borders in the last few years, occupying 142nd position out of 180 countries.[110] RSF's 2021 report notes journalists in India face increasing violence, trolling, and threats of rape and death on social media, along with excessive use of sedition laws for criticism of the government or its policies. Freedom House changed India's status from 'free' to a 'partly free' country earlier this year.[111]

Anjana Krishnan
Research Associate, Asian College of Journalism, Chennai

[107] For the period 2019–20, government ad spending in print was only $1.20 billion, compared to $2.74 billion in 2018–19, which in turn was almost half of $4.28 billion spent in 2017–18. https://caravanmagazine.in/data/fine-print
[108] https://www.huffpost.com/archive/in/entry/how-modi-shah-turned-a-women-s-rights-ngo-into-a-secret-election-propaganda-machine_in_5ca5962ce4b05acba4dc1819
[109] https://www.bbc.co.uk/news/world-asia-india-54715995
[110] https://rsf.org/en/india
[111] https://freedomhouse.org/report/freedom-world/2021/democracy-under-siege

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

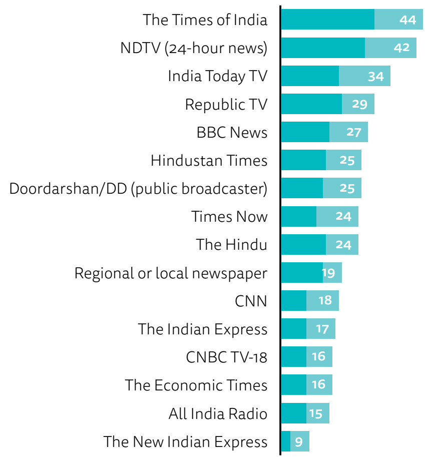
Weekly use
TV, radio & print

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 mainly English-speaking, online news users in India – a small subset of a larger, more diverse, media market. Respondents are generally more affluent, younger, have higher levels of formal education, and are more likely to live in cities than the wider Indian population. Findings should not be taken to be nationally representative.

SOURCES OF NEWS

TV
59%

Online (including social media)
82%

Print
50%

Social media
63%

DEVICES FOR NEWS

Computer
37%

Smartphone
73%

Tablet
14%

TRUST

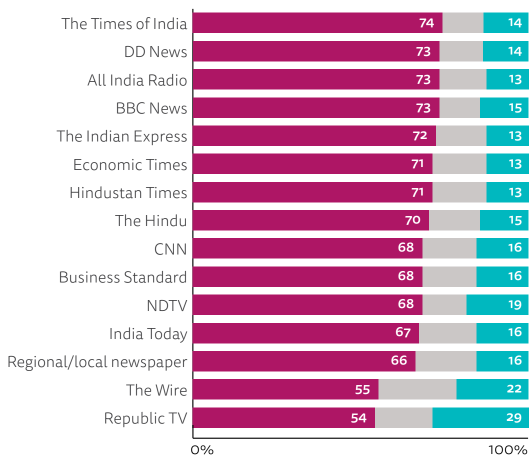
Legacy print brands and government broadcasters, DD News (Doordarshan) and All India Radio, retain high levels of trust among consumers. Print brands, in general, are more trusted than television brands, which are far more polarised and sensational in their coverage. Republic TV, despite its popularity as a news source, has lower trust scores than legacy print and television brands – and the highest levels of distrust.

DIFFERENT TYPES OF TRUST

News overall	News I use
38% 31/46	**45%**

News in search	News in social
45%	**32%**

BRAND TRUST SCORES



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

48%

SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	WhatsApp	53%	80%
2	YouTube	53%	77%
3	Facebook	43%	66%
4	Instagram	27%	50%
5	Twitter	19%	37%
6	Telegram	18%	36%

INDONESIA

STATISTICS

Population	**276m**
Internet penetration	**71%**

Indonesia is the largest market in Southeast Asia with a lively and diverse media sector. But economic pressures generated by Coronavirus, concerns about fake news, and the threat of multiple legal provisions relating to criminal defamation made 2020 an especially challenging year for media businesses

The resignation of Indonesian president Soeharto in 1998 ended 32 years of authoritarian rule, and launched a new era of 'Reformasi'. This, along with the passage of the landmark 1999 Press Law, with its attendant code of ethics and the creation of an independent Press Council, made Indonesia a regional model for press freedom.

But since the fall of Soeharto, powerful media companies owned by tycoons have replaced the state as the primary source of censorship, and the Indonesian media landscape is dominated by eight large commercial entities.[112] Although a wide range of privately owned local publications operate across Indonesia's provinces, the print sector is dominated by two media conglomerates, the Jawa Pos Group and the Kompas-Gramedia Group. Television remains the most widely used medium across Indonesia's vast population, much of which is still not online. Major national commercial networks such as TV One and Metro TV amongst others compete with state-owned Televisi Republik Indonesia (TVRI).

Broadcast media are licensed by the Ministry of Communication and Information Technology and the Indonesian Broadcasting Commission (KPI), both of which operate independently. Although there are few restrictions on news production and distribution for Indonesians, foreign ownership of broadcast media is banned under the 2002 Broadcast Act. Although the Press Council is supposed to adjudicate all media disputes, authorities continue to bring defamation charges to the courts. Defamation is an offence covered by more than 40 provisions of the Criminal Code. The 2008 Electronic Information and Transactions Law likewise provides criminal penalties for those found guilty of distributing, transmitting, and/or making electronic information containing libel accessible to the public.

Indonesia is 87% Muslim, and contains the world's largest Muslim population, but Islam is not the state religion. The national ideology of Pancasila upholds belief in one god, but the world's other major faiths are also formally recognised. Since independence in 1945, Indonesia's brand of secular democracy continues to be contested by those who would prefer a larger role for Islam.

Social media sites such as WhatsApp, YouTube, Facebook, and Instagram are extremely popular among users in Indonesia. TikTok is gaining popularity with the younger generation as elsewhere in the region.[113] Many politicians and parties used paid commenters, known as 'buzzers', and automated accounts to generate political propaganda ahead of the general elections in April 2019. Much attention has been directed at the use of social media to disseminate disinformation (locally known as hoaxes) and hate speech. The Coronavirus crisis in particular has led to an avalanche of misinformation, ranging from the 'danger' of thermometer guns to rumours that vaccines are adulterated with pork.

On the positive side, Indonesia is also home to an exemplary multi-stakeholder NGO dedicated to combating online disinformation, Mafindo (Masyarakat Anti Fitnah Indonesia, or the Indonesian Anti-Hoax Community), and its extensive citizen-run programmes stand in stark contrast to government-led efforts elsewhere in the region, which generally focus on using the criminal law.

The Coronavirus pandemic has affected the overall Indonesian economy, and media have suffered primarily through a loss of advertising revenue. As companies in the private sector cut their marketing budgets, local governments stepped up their spending on media, especially in the provinces. Most ministries allocated funds to promote their activities through the purchase of advertising, thus helping to keep media businesses afloat. Two newspapers – *Koran Tempo* and *Indo Pos*, the national edition of the *Jawa Pos* – stopped publishing print editions in 2020, and *Suara Pembaruan* stopped its print edition in February 2021. Other venerable print publications, such as *Tempo* magazine, *Kompas* newspaper, and the *Jakarta Post*, have strengthened their paywalls.

Controversy over the 2008 Electronic Information and Transactions (ITE) Law continues, as NGOs and press freedom groups to press for its repeal. The law, intended to regulate e-commerce, introduced instead a range of vague and imprecise offences with draconian 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.

Data compiled by Amnesty International Indonesia shows that there were 119 cases of ITE Law violation in 2020, the highest in six years, with 141 suspects, including 18 activists and four journalists.[114]

Janet Steele
Professor of Media and Public Affairs and International Affairs,
George Washington University

[112] Tapsell, R., *Media Power in Indonesia* (New York: Rowman & Littlefield, 2017).
[113] https://theconversation.com/how-tiktok-can-be-the-new-platform-for-political-activism-lessons-from-southeast-asia-155556
[114] https://www.amnesty.id/segera-revisi-uu-ite-dan-tegakkan-kebebasan-berekspresi/

WEEKLY REACH OFFLINE AND ONLINE

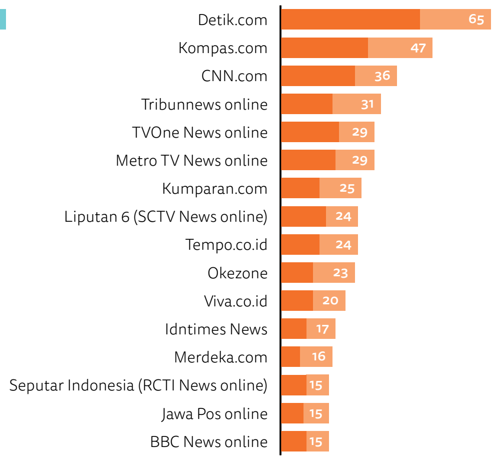
TOP BRANDS

% Weekly usage

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

TV, RADIO AND PRINT

ONLINE



CHANGING MEDIA

Online and social media remain the most popular sources of news in Indonesia with our more urban sample but TV and radio remain important for the millions of people who are not online. The majority of internet news access is via smartphones (85%) with computers much less popular.

19% PAY pay for **ONLINE NEWS**

SOURCES OF NEWS

TV **58%**

Online (including social media) **89%**

Print **20%**

Social media **64%**

DEVICES FOR NEWS

Computer **37%**

Smartphone **85%**

Tablet **10%**

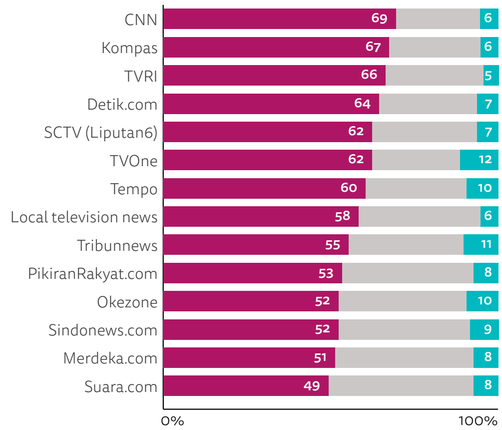
TRUST

Overall trust in news is low (39%) while CNN, which is owned by local conglomerate Trans Media, ranks the highest in brand trust at 69%. Interestingly, the news brand with greatest reach (TVOne) is also one of the brands with a large minority (12%) that say they do not trust it, which some may attribute to its more sensational style of reporting.

DIFFERENT TYPES OF TRUST

News overall	News I use
39% 30/46	**42%**
News in search	**News in social**
37%	**31%**

BRAND TRUST SCORES



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

39% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	WhatsApp	60%	87%
2	YouTube	46%	79%
3	Facebook	42%	65%

Rank	Brand	For News	For All
4	Instagram	38%	66%
5	Twitter	22%	37%
6	Telegram	18%	41%

JAPAN

STATISTICS

Population	**126m**
Internet penetration	**95%**

The Japanese media landscape has long been dominated by five nationwide TV networks and a small number of high-circulation newspapers. But print readership is falling and many news organisations are being forced to embrace digital change.

Japan has had relatively few Coronavirus cases and has been one of the few countries to have avoided a nationally mandated lockdown – but the media industry has not emerged unscathed. Already-decreasing print circulation sank by a further 7% in 2020, outstripping the previous year's fall.[115] On top of a rising tide of subscription cancellations, many readers looked to avoid contact with physical newspapers, partly out of fear of catching the virus.

Meanwhile, a number of media companies accelerated plans for digital transition at a time of crisis. *Nikkei* (Japan Economic Daily), which has forged a reputation as a digital pioneer since it purchased the *Financial Times* in 2015, abandoned its traditional structure of sections such as politics, economics, industry, and foreign news. In its place, *Nikkei* has created five units targeted at different audience needs – business, lifestyle, finance/markets, society, and policymaking. The change aims to focus more on distinctive content, rather than continuing to pump out commoditised business information.

The *Asahi Shimbun* newspaper, another leader in digital transition, has been trying to attract new audiences through Line, Japan's dominant messenger app. The liberal daily announced in February 2021 that they have now 5 million Line friends, who receive *Asahi's* news bulletins and alerts every day. Meanwhile, its digital platform Asahi Shimbun Digital has acquired 3.75 million registrations, of whom 320,000 are paid subscribers.[116] *Asahi* has also stepped up its use of daily and weekly newsletters, including an article series delivered ahead of online publication. The series, 'Another Note', brings personal and compelling stories from frontline journalists.

Paying for online news remains at a relatively modest level in Japan, though it has increased slightly this year to 10% (+2pp). *Nikkei* and Asahi are the most successful publishers in terms of subscription according to *Digital News Report* data, along with *Yomiuri*, whose full digital subscription is still entirely linked to print. But efforts have been hampered by the popularity of free services such as Yahoo! News, SmartNews, and Gunosy that aggregate online content from multiple publishers. Yahoo! Japan and Line merged their operations by placing the two under a holding company in 2021 to compete better with US and Chinese tech rivals. They will, however, keep their news services separate.

One new entrant to the subscription market this year has been SlowNews, which specialises in long reads and tough investigations. With a monthly payment of 1,650 yen, or £11, it combines local journalism with in-depth reports from the *New York Times*, ProPublica, and the *Guardian* translated into Japanese, along with more than 100 books from six major publishers. SlowNews, which is a subsidiary of the mobile aggregator SmartNews, aims to use any profits to support more investigative journalism.

A trend of growing collaborations across Japanese media houses was highlighted by the breaking of two exclusive stories in February 2021. One carried allegations of a seemingly organised mass falsification of signatures in a recall petition against the Aichi Prefectural Governor. Another revealed a secret agreement over the use of an American base in Okinawa between US Marines and the Japanese Ground Self Defence Force. The bogus signature story was a joint investigation by the *Chunichi* newspaper from Aichi and *Nishi-nippon* (West-Japan) newspaper from Fukuoka. The military story involved deep collaboration between the *Okinawa Times* newspaper and Kyodo news agency, which was able to provide the support of a veteran defence reporter with 25 years' experience.

Such newsroom alliances have previously been unheard of in Japan's company-centred journalistic culture, but have been encouraged by the global impact of the Panama Papers investigation in 2016 and other collaborative projects. During the tenth anniversary of the Great East Japan Earthquake of 2011, dozens of news media joined a Twitter hashtag #bosai-ima-dekirukoto ('what we can do now for disaster preparedness') as a way of aggregating disaster-related stories. The hashtag appeared automatically with an emoji of a paper crane, which represents care and prayer.

More widely, live internet streaming of TV has taken a leap forward this year with public broadcaster NHK launching a full online streaming service in April 2020. Several major private broadcast stations are now reportedly planning to add live streaming to their joint archive platform TVer, whose views soared during the pandemic.

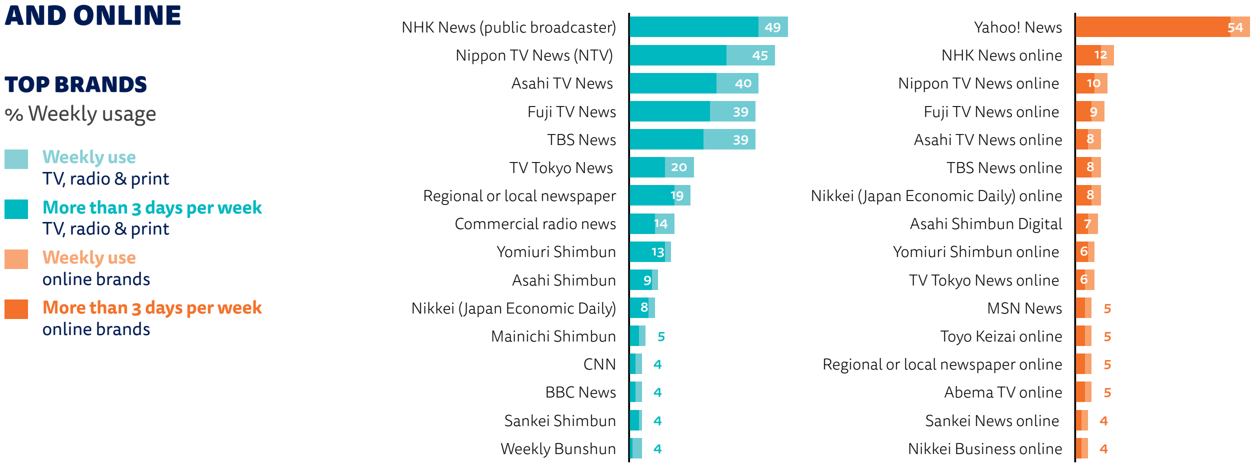
Yasuomi Sawa
Journalist and Professor at the Department of Journalism, Senshu University

[115] https://www.pressnet.or.jp/english/data/circulation/circulation01.php
[116] https://www.mediatechnology.jp/entry/2020/10/12/100000
[117] https://www.chosakai.gr.jp/wp/wp-content/themes/shinbun/asset/pdf/project/newsd/20210300_710.pdf#page=1

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage



CHANGING MEDIA

Traditional forms of media such as TV and print have declined in importance over the last few years. Newspaper readership has more than halved since 2013. Japanese engage with online news primarily through aggregators like Yahoo! News. They also tend to use social networks less, and have taken longer to fully embrace smartphones.

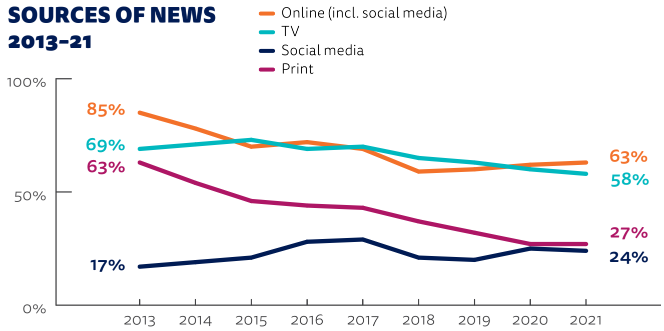
10% PAY

pay for **ONLINE NEWS**

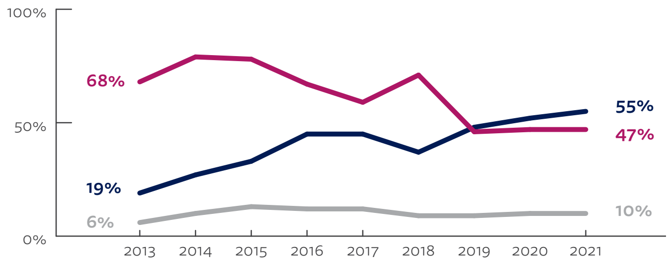
25%

listen to **PODCASTS** in the last month

SOURCES OF NEWS 2013–21



DEVICES FOR NEWS 2013–21*



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

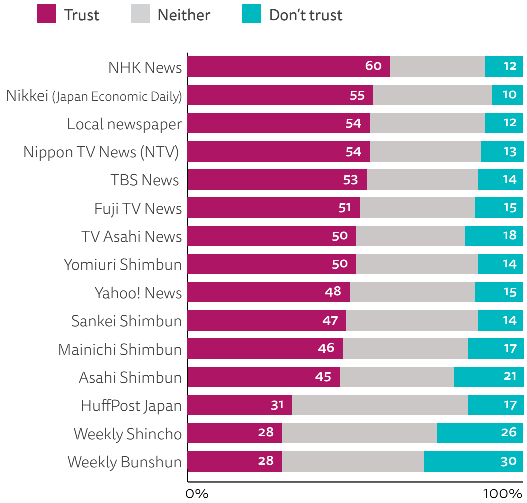
TRUST

Overall trust in the news has risen by five percentage points in the last year while trust in social media has fallen by two points. The news media were widely consulted during the pandemic, with greater impact than the national government and a long way ahead of social media, according to a survey from the Japan Press Research Institute.[117] Public broadcaster NHK remains the most trusted news brand.

DIFFERENT TYPES OF TRUST

News overall	News I use
42% (+5) =22/46	**43%**
News in search	**News in social**
27%	**21%**

BRAND TRUST SCORES



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

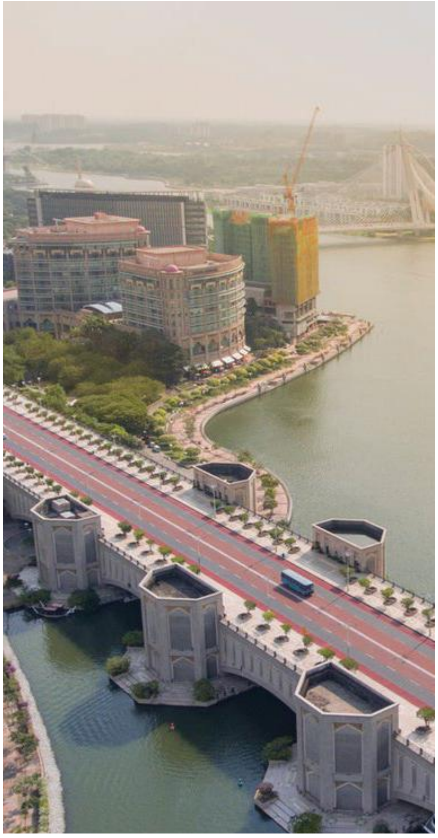
13%

SHARE NEWS via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

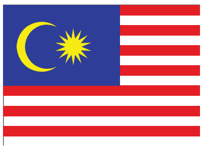
Rank	Brand	For News		For All	Rank	Brand	For News		For All
1	YouTube	24%	(+5)	57%	4	Facebook	6%	(-)	19%
2	Line	18%	(+2)	39%	5	Instagram	4%	(+1)	21%
3	Twitter	16%	(+1)	31%	6	Niconico	2%	(-)	8%

MALAYSIA



STATISTICS

Population	33m
Internet penetration	89%



After the collapse of a reformist government in February 2020, renewed political instability and a national state of emergency, ostensibly as a result of COVID-19, have reversed hopes for improvement in media freedom in Malaysia.

For a brief period of 22 months – from May 2018 until February 2020 – the Malaysian media environment was one that held out hope, despite the technological and economic pressures, especially on the print media. A new coalition government, Pakatan Harapan (PH), was in power for the first time in the 61-year history of Malaysia's general elections. PH promised reform in many areas, including the media, where it repealed a controversial Anti-Fake News Act and set the wheels in motion for an independent national Media Council. But due to its inexperience and external resistance, many of these hopes remained unfulfilled when the coalition suddenly collapsed.

Citing the COVID-19 pandemic, the hastily assembled Perikatan Nasional (PN) coalition government initially suspended parliament, locked down the country, and convinced the Malaysian King to declare a national emergency, beginning 12 January until 1 August 2021.

The emergency gives PN exceptional powers over the media. It already has an arsenal of draconian legislation at its disposal, the main ones being the Communications and Multimedia Act 1998 (CMA) and the Sedition Act 1948. These powers allowed PN to issue an anti-fake news emergency ordinance on 12 March this year 'that effectively bans any information about the Coronavirus pandemic or current state of emergency that is not to its liking ... The publication of such information with "intent to cause, or which is likely to cause fear or alarm to the public, or any section of the public" is punishable by three years in prison and a fine of 300,000 ringgits (€20,000).'[118]

Journalists and other media professionals face renewed intimidation after 22 months of relative freedom. Two internationally reported incidents were the July 2020 police investigation of an Al-Jazeera documentary on the arrest of undocumented migrant labourers and the questioning of a *South China Morning Post* (*SCMP*) journalist who had reported on migrant arrests.[119]

More recently, graphic artist Fahmi Reza and political cartoonist Zunar were detained and investigated by the police under the Sedition Act, the Penal Code, and the CMA. Fahmi's 'crime' was satirising the Malaysian Queen, while Zunar's was for 'mischief and abuse of the internet over a caricature' of the Chief Minister of the state of Kedah.[120]

In February this year, the country's most popular independent online newspaper, Malaysiakini, was found guilty of contempt by Malaysia's highest court, for posting five critical readers' comments about the Lord President and the judiciary. The portal was fined a whopping MYR500,000 but, more tellingly, it took Malaysiakini only six hours to raise the sum from public donations. Now Malaysiakini appears to be besieged again, together with local Chinese-language portal, China Press. In April, both were summoned by the Home Ministry over 'unfavourable' – albeit accurate – reports about a careless statement on rape made by the Deputy Inspector General of Police.

Structurally, television remains a key source of news for many of the older generation who are not internet-savvy. More creative and critical formats, such as Awani's *Consider This* current affairs talk show, have drawn in a more urban, questioning audience.

Political actors have again stepped in to own and control the Malaysian media environment in anticipation of an early general election in 2022. A new online news portal, The Vibes (thevibes.com) was launched in September 2020, said to be backed by opposition leader, Anwar Ibrahim. Most online portals still provide free access, although some, like The Malaysian Insight (TMI), have followed the path set by Malaysiakini of adopting a subscription-based model.

The biggest Malaysian media conglomerate, Media Prima, has also come under the spotlight with recent share acquisitions by former BN second finance minister, Johari Abdul Ghani. Two years ago, Media Prima was bleeding financially for economic and technological reasons. But the past year or so has seen a revival of its fortunes due to the fresh injection of funds by prominent Malaysian tycoon, Syed Mokhtar Al-Bukhary.[121]

These manoeuvres point to a familiar pattern close to general elections where the dominant political parties consolidate their control over the media. It has also been reported that online media are being targeted this time around.

Zaharom Nain
University of Nottingham in Malaysia

[118] Reporters Without Borders, Mar. 2021. https://rsf.org/en/news/new-malaysian-ordinance-threatens-very-concept-truth.
[119] *Bangkok Post*, July 2020. https://www.bangkokpost.com/world/1947336/malaysia-probes-al-jazeera-documentary-about-migrant-arrests
[120] *Free Malaysia Today*, Apr. 2021. https://www.freemalaysiatoday.com/category/nation/2021/04/28/zunar-hauled-up-over-cartoon-on-axing-of-thaipusam-holiday/
[121] Media Prima's diverse media empire includes all four of Malaysia's free-to-air television stations, the *New Straits Times* press, popular radio stations Fly FM and HotFM, and leading outdoor advertising company, Big Tree.

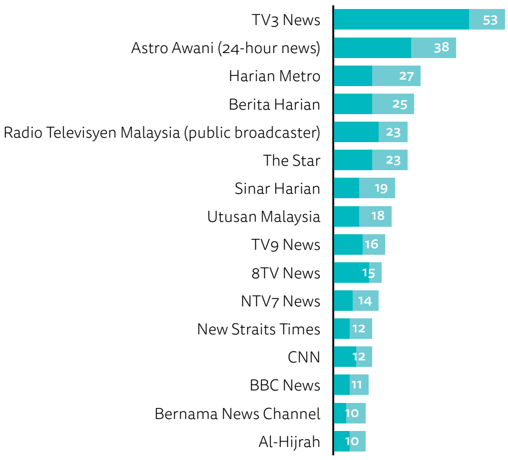
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

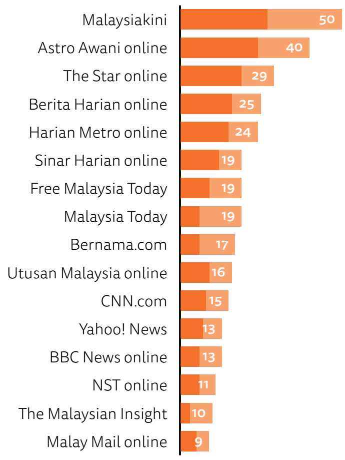
% Weekly usage

- 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



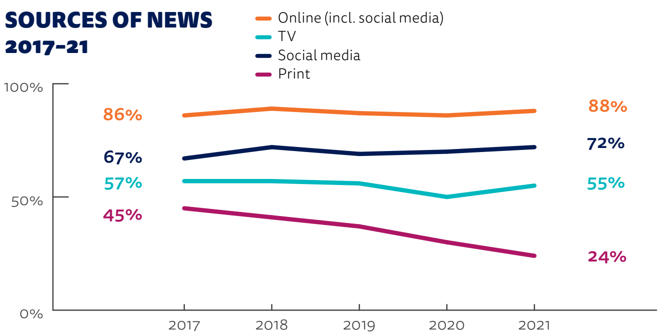
CHANGING MEDIA

Print has continued its decline as a source of news. Increasing use of smartphones to get news has coincided with the increasing popularity of online news media. Television news has become more attractive partly due to the various lockdowns forcing many to stay at home.

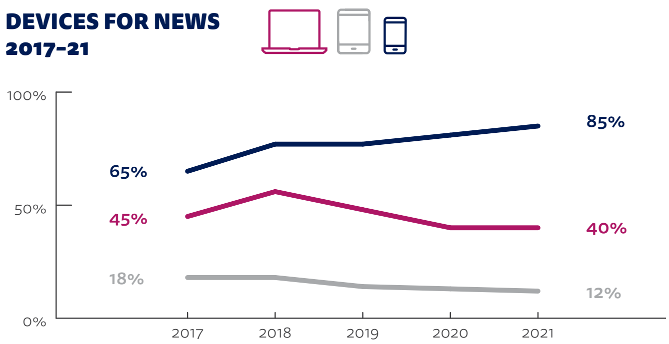
16% PAY

pay for **ONLINE NEWS**

SOURCES OF NEWS 2017–21



DEVICES FOR NEWS 2017–21



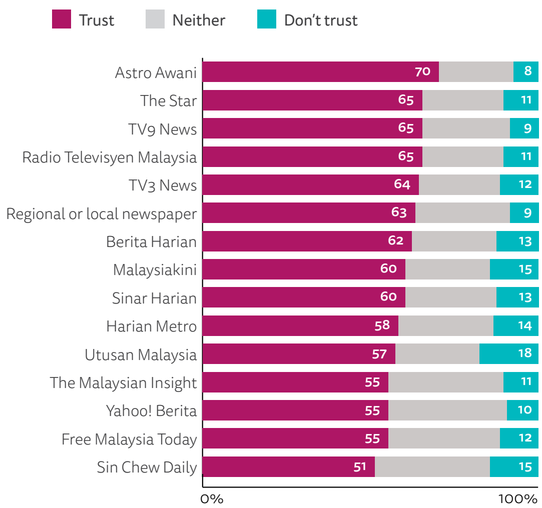
TRUST

Overall trust in the various media has increased considerably as compared to the past two years. The pandemic and lockdowns have resulted in greater dependence on the main news sources for information on the threats and challenges of the virus. Astro Awani, a 24-hour news channel with innovative, often critical, news and current affairs programmes, still leads in the area of brand trust.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
41% (+16) =24/46	**43%**
News in search	***News in social***
35%	**24%**

BRAND TRUST SCORES



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

47%

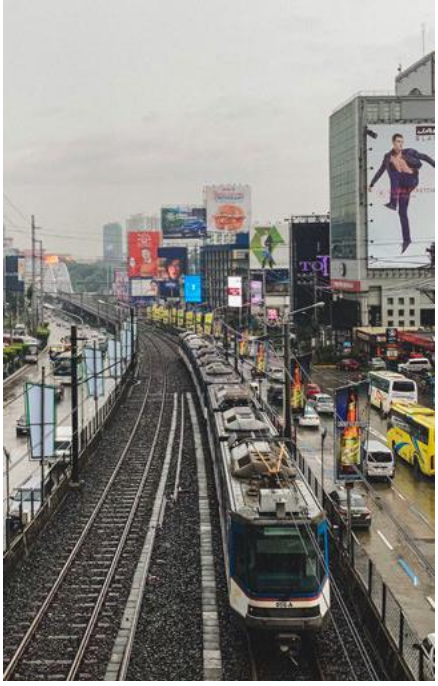
SHARE NEWS via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	56% (-1)	77%
2	WhatsApp	54% (+3)	83%
3	YouTube	36% (+3)	75%

Rank	Brand	For News	For All
4	Instagram	22% (+2)	50%
5	Telegram	20% (+8)	45%
6	Twitter	16% (+1)	29%

PHILIPPINES



STATISTICS

Population	**111m**
Internet penetration	**78%**

Major revenue drops arising from prolonged COVID-19 lockdowns have forced significant downsizing of the Philippine media. The media environment has also been reshaped by the closure of a major free-to-air TV network. Journalists that have been critical of the government continue to face attacks and online harassment.

The Philippines somewhat defies the trend in many countries that has seen TV viewing surge as lockdowns grounded people at home. By February this year, at the time the Digital News Report survey was conducted, TV usage had slid to 61% (–5pp) with an even bigger decline in print consumption to 16% (–6pp). The decline in TV viewing may have been partly influenced by the closure of ABS-CBN's free-to-air stations after the House of Representatives refused to renew its franchise to operate. The once profitable media giant continues online and via a number of pay television channels but laid off nearly 5,000 of its 11,000 employees, including a third from its news staff, and chalked up losses of $150m as of the third quarter of 2020.

By contrast, the rival GMA Network enjoyed a 79% jump in profits (US$80.6m), from the previous year for the same period, while other big publicly listed media houses reported significantly reduced profit. Besides benefiting from the airtime advertising resulting from ABS-CBN's closure, GMA's online and digital ad sales grew 36%. It has launched a DTT receiver, GMA Affordabox, and mobile dongle, GMA Now.

Many big television networks have taken to rebranding or reformatting programmes in a bid to engage consumers. Manila Broadcasting Company replaced DZRH Network News with MBC Network News, which now simulcasts three times a day on its flagship and provincial radio and television stations. TV5 converted its primetime newscast *Aksyon* to *Frontline Pilipinas* and fielded more anchors. Last February, GMA Network rebranded GMA News TV, its second free-to-air channel, as GTV (Good TV), adding more sports, entertainment, and lifestyle programmes to its existing line-up of news and current affairs programmes.

The newspaper industry has been hit particularly hard as COVID-19 curtailed distribution. The *Philippine Daily Inquirer* (*PDI*), one of the biggest dailies, offered early retirement to employees, let go of several columnists, shut down its Metro section, and shrank the number of its pages. Earlier, it closed its free paper *Inquirer Libre* and tabloid *Bandera*, keeping the latter only online. In March, *PDI* launched a digital subscription package where its Inquirer Plus mobile app combines access to one of eight local newspaper partners. It says this strategy will help local journalism remain sustainable and is in keeping with the growing subscription model worldwide.

At least a dozen big community papers temporarily ceased publication, returning later in the year with reduced pages or frequency. The newspaper association Philippine Press Institute has been supporting struggling community papers by paying for some of the stories they post on its website, PPI News Commons.

Going digital makes sense in a country that spends the greatest amount of time online in the world (nearly 11 hours per day), particularly on social media (more than four hours).[122] Social media as a source of news have risen to 72% (+4) in our survey, with TikTok even becoming a destination for news among Filipinos (6%) alongside Facebook (73%), YouTube (53%), Facebook Messenger (36%), and Twitter (19%).

Despite the overall slight drop in podcast listenership from a year ago (–3pp to 54%), podcasting remains especially popular with younger users. A survey for Spotify bears this out,[123] prompting the platform to sign up 16 Filipino podcasts exclusively.

Locally produced news and current affairs podcasts include those from ANC, Puma Podcast, and the *Manila Times*. *PDI* and the Philippine Center for Investigative Journalism are newcomers.

Over the past year, a number of Filipino journalists have been dogged by 'red-tagging', where they are labelled state enemies, subversives, or communists by the police and military, including via social media. In September, Facebook removed more than 100 fake accounts traced to police and military units in the Philippines for engaging in 'coordinated inauthentic behaviour'.[124] Maria Ressa and Rappler continue to be the subject of political attacks and a series of threats and lawsuits that Reporters Without Borders describe as 'a clear and present danger to press freedom'. She is not alone. One female editor from the red-tagged alternative news site Manila Today was arrested on charges of illegal possession of firearms and explosives on 10 December, International Human Rights Day – though she was released months later. In Central Philippines, a 22-year-old 'red-tagged' female journalist has been languishing in jail for more than a year on charges of illegal possession of firearms.

Meanwhile, a bill seeking to renew the franchise of ABS-CBN has been filed in both chambers of Congress. But chances that the network would operate its free-to-air stations again while President Rodrigo Duterte is in office appear to be slim.

Yvonne T. Chua
University of the Philippines

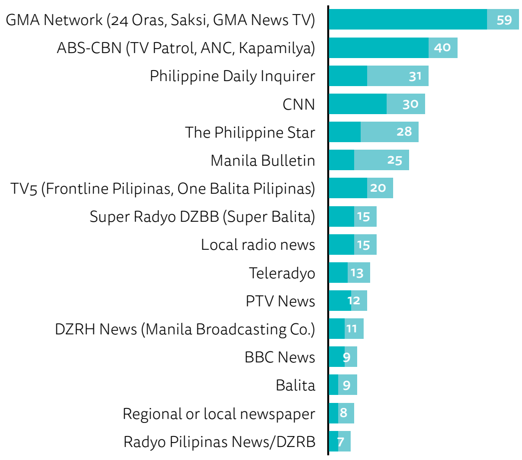
[122] https://wearesocial.com/digital-2021
[123] https://culturenextvol1-sea.spotifyforbrands.com/ph
[124] https://about.fb.com/news/2020/09/removing-coordinated-inauthentic-behavior-china-philippines/

WEEKLY REACH OFFLINE AND ONLINE

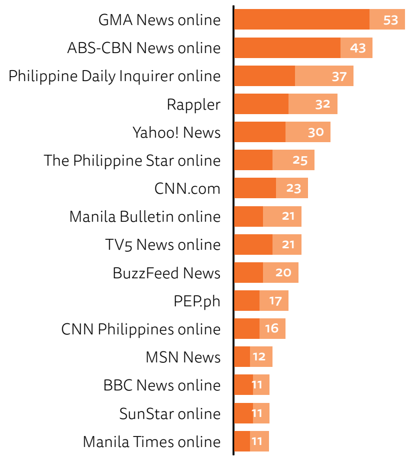
TOP BRANDS
% Weekly usage

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

TV, RADIO AND PRINT



ONLINE



CHANGING MEDIA

Dependence on smartphones to access online news, including on social media, has grown among Filipinos (+3pp) during what was one of the world's longest lockdowns due to COVID-19. Not surprisingly, consumption of traditional media, particularly print, has gone down.

17% PAY
pay for
ONLINE NEWS

SOURCES OF NEWS

TV **61%** (-5)

Online (including social media) **87%** (+2)

Print **16%** (-6)

Social media **72%** (+4)

DEVICES FOR NEWS

Computer **39%** (-)

Smartphone **78%** (+3)

Tablet **12%** (-2)

TRUST

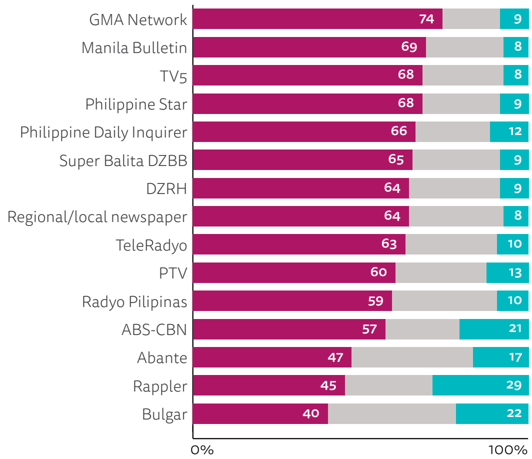
Overall trust in news among Filipino internet users has risen (+5pp), but has fallen in social media (-2pp) amid concerns over misinformation on the internet, especially information about Coronavirus from government, politicians and political parties, and ordinary people. Distrust in news brands has declined except for Rappler, which government supporters continue to attack.

DIFFERENT TYPES OF TRUST

News overall	News I use
32% (+5) =38/46	37%
News in search	**News in social**
30%	20%

BRAND TRUST SCORES

Trust / Neither / Don't trust



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

47%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All	Rank	Brand	For News		For All
1	Facebook	73%	(-)	86%	4	Twitter	19%	(+3)	33%
2	YouTube	53%	(+4)	85%	5	Instagram	12%	(-)	41%
3	Facebook Messenger	36%	(+3)	76%	6	TikTok	6%	(+4)	22%

SINGAPORE

STATISTICS

Population	**5.8m**
Internet penetration	**88%**

Trust in the news media in Singapore has increased significantly in a year marked by the COVID-19 pandemic, a historical election that saw the political opposition make unprecedented gains, as well as layoffs in one of the two media conglomerates in the country. The pandemic and the elections also saw the government invoke the country's 'fake news law' several times, sparking criticisms.

Mainstream news media brands remain the most trusted news sources, with MediaCorp's round-the-clock news network Channel News Asia (CNA) being the most trusted (79%) followed by the newspaper *The Straits Times* (77%) published by the Singapore Press Holdings (SPH). SPH publishes most of Singapore's local newspapers, including Chinese-language *Lianhe Zaobao*, Malay-language *Berita Harian*, and Tamil-language *Tamil Murasu*. Mediacorp operates all the local television stations and most radio stations in Singapore.

Initially praised internationally for its handling of the COVID-19 virus, Singapore went through pockets of panic buying as the number of positive cases exponentially rose in dorms occupied by migrant workers in March 2020 – leading to nearly two months of lockdown.

Singapore held its general elections in July 2020, where the ruling party won the majority of the seats, as expected, but its share of total votes shrank as the political opposition gained ground. A combination of the elections and the pandemic may help explain the increase in news media trust – which is up by nine percentage points – as residents found themselves relying on the news media for important and accurate information, amid the flurry of fake news online.[125]

Last year, the Singapore government issued several correction orders under its Protection from Online Falsehoods and Manipulation Act (POFMA), a law passed in May 2019 that empowers ministers to issue corrections or take down orders against online falsehoods.

Some of the orders targeted posts by opposition parties during the campaign,[126] while others targeted COVID-19 related claims, such as one posted by the States Times Review (STR) on Facebook claiming that COVID-19 spread in schools in May 2020.[127]

Operated outside the country, the STR is a website critical of the administration that has been called out for publishing sensationalised and inaccurate accounts, and it is also used weekly by 7% of our survey respondents. While the website had been banned in Singapore since 2018, followers could still access its Facebook page until the government ordered local access to be blocked in February 2021. While Facebook complied with the government order, it expressed concern 'about the precedent this sets for stifling freedom of expression in Singapore'.[128] The government justified its move by saying swift actions were needed against COVID-19 related falsehoods that can trigger public panic.

Mediacorp's CNA remains the most popular traditional news brand, used weekly by 39%, followed by SPH's *The Straits Times* (38%) and Mediacorp's Channel 5 (27%) and Channel 8 (25%) newscasts. CNA's website was also the most used digital brand (48%), followed by the online-only Mothership.sg (42%) which is now just ahead of the website of *The Straits Times*. While it has climbed over the years to be the second most used news website in Singapore, it ranks significantly lower in brand trust. Founded in 2014, Mothership.sg is known for its bite-sized articles, many of which are sourced from viral social media posts. It has since amassed a large following and been recognised as a registered news media outlet in Singapore.

Offline and online news platforms in Singapore are covered by an extensive regulatory system. 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. In 2013, the government 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.[129]

In terms of specific social media platforms, WhatsApp and Facebook both saw significantly lower usage for news this year, though Telegram, another messaging app, is up three percentage points to 14% for news. WhatsApp remains the most popular social app overall, however, and the Singapore government has made full use of this platform, sending daily WhatsApp updates on COVID-19 to subscribers.

In September 2020, SPH announced the layoff of 140 of its employees from its media sales and magazines operations, citing the impact of COVID-19 on advertising. In May 2021 it announced it would be transferring its media business to a not-for-profit company to focus on new funding streams to support quality journalism.[130]

Edson C. Tandoc Jr.
Wee Kim Wee School of Communication and Information, Nanyang Technological University, Singapore.

125 https://www.channelnewsasia.com/news/commentary/covid-19-coronavirus-forwarding-whatsapp-message-fake-news-12670016
126 https://www.straitstimes.com/politics/pofma-correction-directions-issued-to-4-facebook-pages-1-website
127 https://www.todayonline.com/singapore/government-directs-states-times-review-correct-post-about-covid-19-cases-schools
128 https://www.channelnewsasia.com/news/singapore/facebook-blocks-singapore-users-access-states-times-review-pofma-12446952
129 https://www.gov.sg/factually/content/what-is-the-licensing-framework-for-online-news-sites-all-about
130 https://www.straitstimes.com/singapore/sph-to-restructure-media-business-into-not-for-profit-entity

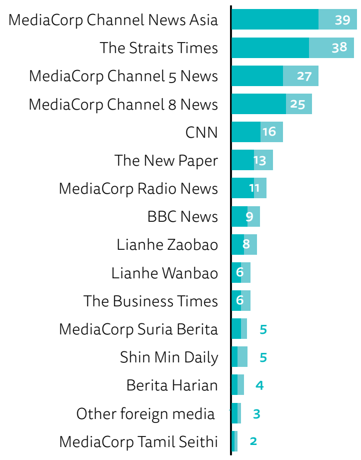
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

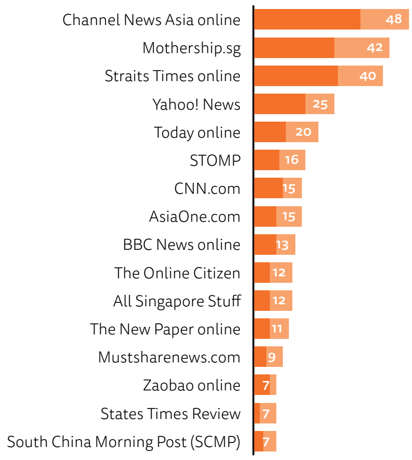
% Weekly usage

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

TV, RADIO AND PRINT



ONLINE



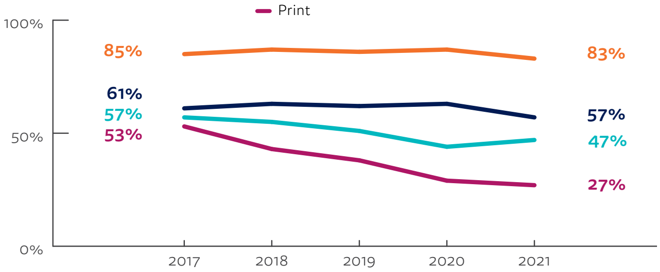
CHANGING MEDIA

Online news remains the primary way of getting news, though the use of social media for news has declined slightly compared with last year. Singaporeans turned more to TV during the COVID crisis but print use has fallen further – halving in just five years.

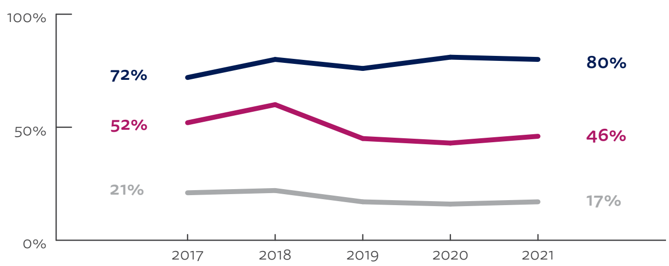
14% PAY pay for **ONLINE NEWS**

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

SOURCES OF NEWS 2017–21



DEVICES FOR NEWS 2017–21



TRUST

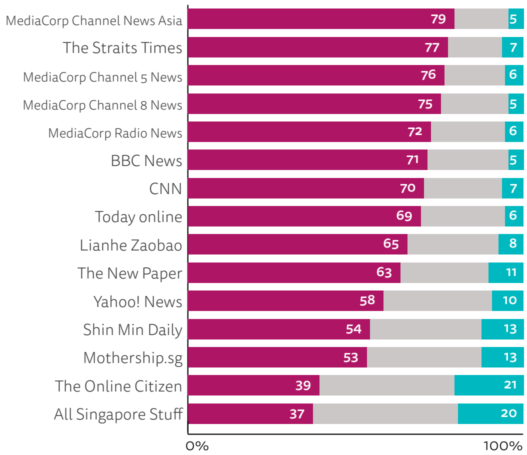
Trust in the news increased to 45%, with respondents also trusting more the news that they use. Trust in news obtained in search engines and social media remained at similar levels to last year.

DIFFERENT TYPES OF TRUST

News overall	News I use
45% (+9) 18/46	**50%**

News in search	News in social
26%	**18%**

BRAND TRUST SCORES



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

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

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	WhatsApp	40%	(-7)	88%
2	Facebook	40%	(-6)	70%
3	YouTube	25%	(+1)	73%

Rank	Brand	For News		For All
4	Telegram	14%	(+3)	38%
5	Instagram	13%	(-3)	49%
6	Twitter	7%	(-)	18%

SOUTH KOREA

STATISTICS

Population	51m
Internet penetration	96%

News consumption and trust in news media have both increased since the outbreak of COVID-19, but media outlets are struggling to shore up finances that have been adversely affected by the pandemic.

Koreans have come to depend more on the news over the last year as the pandemic has impacted both lives and livelihoods. This is likely to be a key factor in the sharp rise in trust (+11 percentage points) in this year's survey, while trust (and consumption) of social media has fallen. Much of this has been driven by increased reliance on television news and increased reach for both scheduled news bulletins and live news channels.

A survey by the Korea Press Foundation,[131] also found widespread dependence on television as a source of news about COVID-19, along with the big online portals Naver and Daum. Three-quarters (72%) of respondents said their news usage had increased over the last year. Use of OTT streaming services like Netflix has increased and overall viewing time is up, after years of decline.

But media outlets have been struggling to cope with the financial fallout from the pandemic. According to industry research,[132] corporate ad spending for 2020 is projected to fall by 5% for television, print, and other media, while online ads are expected to rise. The decline in corporate ads has hit broadcasters more severely than newspapers, which can still rely on a steady stream of government advertising – levels of expenditure have risen every year since 2016.[133] For this reason, terrestrial broadcasters issued a joint statement calling for emergency financial support from the government.

Against this backdrop, media companies are trying to slash costs and diversify revenue streams. Broadcasters have increased the proportion of online and mobile ads, while taking active steps to produce and distribute content through online platforms. Newspapers have introduced unpaid leave and cut staff. A survey conducted by Korea Press Foundation,[134] found that a third (31%) of newspaper companies have already reduced the number of pages or plan to do so. While many companies are hoping for governmental support such as tax cuts, some are experimenting with new business models, including paid digital subscription.

In South Korea, news consumers tend to pay for a mix of diverse content such as YouTube Premium or bundled content services offered by telecom service providers. Few people are willing to pay a subscription just for news – and most of the rest (80%) say they would be very or somewhat unlikely to pay in the future.

Online reader payment has been slow to take off in South Korea because of the strength of online portals that offer a convenient package of free news from multiple publishers. For many years these portals have paid publishers significant sums to license content – rather like Facebook and Google are starting to do elsewhere. But in 2020 the largest portal, Naver, announced it would be switching back to an advertising revenue share model and announced plans to offer an additional subscription-based model for premium content. Publishers are considering whether to sign up for the new service which would provide a share of profits but might risk building deeper connections on their own websites.

While YouTube remains the most widely used platform for Korean users, Facebook, KakaoTalk Messenger, and Instagram are emerging as fresh news sources. Also notable is the increased industry focus on email newsletters, with a variety of new services from start-ups to mainstream media companies, even if usage levels remain low.

Media bias has long been regarded as a chronic problem of the Korean media – especially when it comes to politics. Many respondents to our survey feel that news coverage is often particularly unfair when it comes to representing different political opinions as well as people from a lower socio-economic class. With Korea set to hold the presidential election in 2022, fairness of media coverage on serious topics such as politics and the economy is expected to be a critical issue.

This year's survey also finds that the vast majority of Korean respondents still hold out the hope that media outlets will offer objective news, carrying a variety of perspectives that help consumers make up their own minds. At the same time, last year's report showed that the proportion of respondents who prefer 'news reflecting their views' was also high. This suggests that there is both political bias in news production and readers' bias in their consumption of news which may be hard to balance.

Se-Uk Oh
Korea Press Foundation, and
So-Eun Lee
Pukyong National University

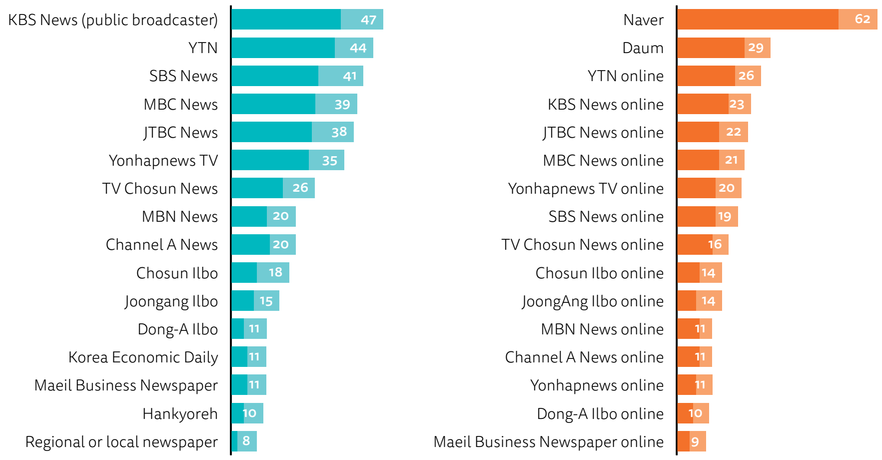
[131] Korea Press Foundation, *Changes in the Everyday Life After COVID-19 in Korea.* https://www.kpf.or.kr/front/research/consumerListPage.do
[132] Korea Broadcast Advertising Corporation, *Korea Advertising Expenditure Research.* https://adstat.kobaco.co.kr/sub/expenditure_report_view.do?MENU=ad_data&BBS_ID=1308
[133] https://www.goad.or.kr/hp/info/govAdStat.do
[134] Korea Press Foundation, *Newspaper Industry in Korea 2020.* https://www.kpf.or.kr/front/research/realityListPage.do

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

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



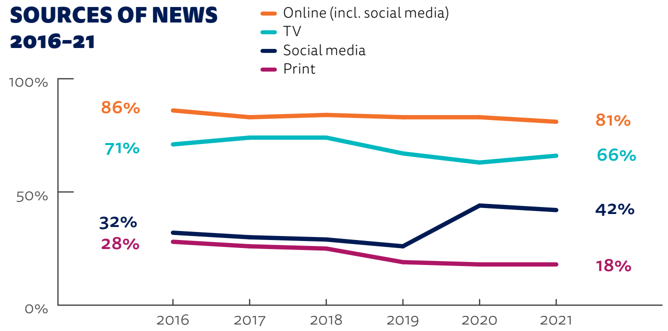
CHANGING MEDIA

The use of TV news, which was declining, has rebounded since the outbreak of COVID-19. Social media have become much more important as a source of news, driven by global platforms YouTube, Facebook, and Instagram.

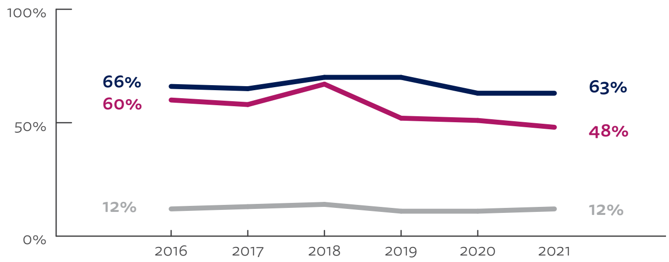
13% PAY
pay for **ONLINE NEWS**

49%
listen to **PODCASTS** in the last month

SOURCES OF NEWS 2016–21



DEVICES FOR NEWS 2016–21*



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

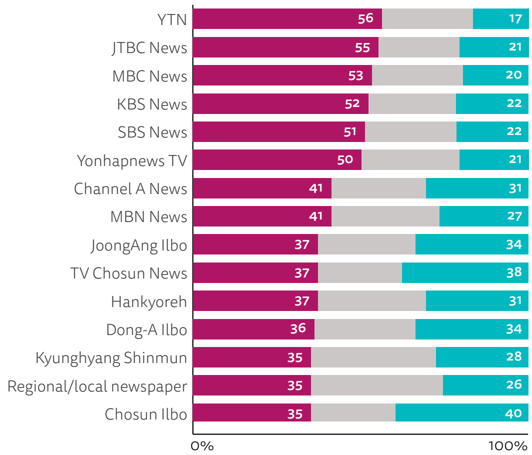
TRUST

Trust in the news in general has surged (+11pp) amid the COVID-19 pandemic, but remains low by international standards. Trust in individual media brands has also gone up, with a number of broadcasters heading the list – including YTN, a 24/7 cable news channel, and public broadcaster KBS. Newspapers, by contrast, tend to be less trusted.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
32% (+11) =38/46	**42%**
News in search	*News in social*
26%	**21%**

BRAND TRUST SCORES



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

25%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	YouTube	44%	(-1)	74%
2	Kakao Talk	27%	(-)	75%
3	Facebook	16%	(-3)	39%
4	Instagram	12%	(+3)	41%
5	Twitter	7%	(+1)	18%
6	Kakao Story	5%	(-3)	23%

TAIWAN

STATISTICS

Population	**24m**
Internet penetration	**93%**

Despite its proximity to mainland China, Taiwan managed to keep the COVID-19 outbreak at bay without the need for lockdowns. Early warning about the threat came via posts on a popular online bulletin board, enabling the government take decisive measures to cut travel across the Taiwan Strait.

One early morning in mid-December 2019, doctors at the Center for Disease Control (CDC) came across a post on Taiwan's online bulletin board system (PTT). The post included a screenshot of messages sent by Chinese doctor Li Wenliang, indicating that at least seven cases of atypical pneumonia had been reported in Wuhan, China. The information was initially covered up in China and Doctor Li was later punished for leaking the information – before succumbing himself to the disease. Taiwan had suffered greatly during the SARS epidemic in 2003, and the government was quick to close its border with China at the end of January – two months before the European Union acted.

The government was also proactive in creating campaigns around frequent hand washing, keeping a social distance, and wearing masks and distributed these messages through daily press conferences, as well as social media channels including Line and Facebook. The government also requisitioned both terrestrial and satellite television channels to broadcast a public health video produced by the CDC. Taiwanese citizens have historically low trust in the news but the media's role in emphasising public health messages may have contributed to a significant rise this year to 31% (+7pp). A range of NGOs and health organisations also contributed to the effort to bring accurate and updated information to citizens. Technology was widely used, including apps showing the numbers of masks left in each drugstore. The Taiwan FactCheck Center, a non-profit organisation made up of journalists and educators, stepped up its efforts to debunk false information. Other approaches enlisted members of the public to help verify the authenticity of information via apps like News Helper and Cofacts LINE BOT.

Despite these efforts, rumours and conspiracies still spread, not least from mainstream media outlets from the China Times media group. Two of its pro-China TV channels were fined for exaggerating the extent of the virus spread and for 'violating the principles of fact verification' by the National Communications Commission (NCC). The ChungTien News Channel had falsely claimed in a headline that Taiwan was 'to be locked down in six days'. Another channel in the group, Chinese Television, had reported that 148 soldiers had been infected and were spreading the virus in local communities, whereas in fact 24 sailors from a naval ship had tested positive and had been quarantined.[135] ChungTien has been repeatedly fined during its six-year licence period for 25 breaches of media regulations ranging from biased reporting to spreading misinformation.

As a result of these breaches and its failure to improve internal controls, ChungTien's licence renewal was rejected in November 2020 by the NCC and it ceased broadcasting. The opposition Chinese Nationalist party protested that the government had interfered with press freedom and undermined Taiwan's democracy. ChungTien's news channel continues to operate online and there is an ongoing battle to take its crucial slot on cable television. If this slot is given to Public Service Television, this could give more prominence to a news service which has gained support from a small but influential audience in recent years.

Aggregators play an important part in online news consumption in Taiwan. Yahoo! News remains the most used digital news source (39% weekly use). It provides a convenient one-stop for news from multiple news providers, along with email, blogs, and games. Line News (34%), which is linked to the popular messaging app of the same name, has also gained popularity and both organisations have started to provide more of their own content, including commentaries, online polls, and discussions.

More than two-thirds of Taiwanese use social media (including Line, Facebook, and YouTube) for all purposes and most of them also use the networks for news. Because social media are seen as a key source of misinformation – as well as disinformation from foreign forces – the government is proposing regulation via a new digital communication bill. This would require platforms to consult local fact-checking organisations, tell the public about false information circulated, and publish annual reports in how they are handling so-called 'fake news'.

Lihyun Lin
National Taiwan University

[135] Taiwan adopts a co-regulation approach whereby the public can file complaints about news programmes that are then judged by experts. A content review committee is composed of media scholars, professionals, and NGO representatives who decide if the contents have violated the regulations. The NCC makes the final decision.

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

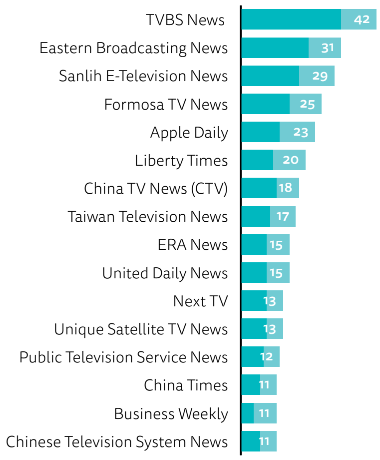
Weekly use
TV, radio & print

More than 3 days per week
TV, radio & print

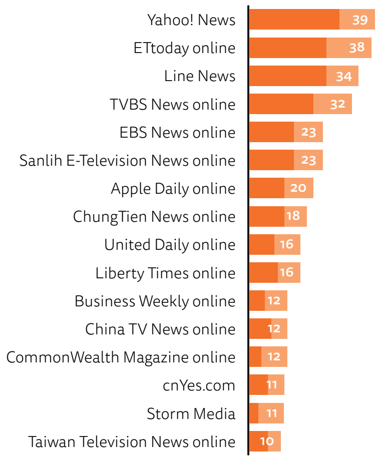
Weekly use
online brands

More than 3 days per week
online brands

TV, RADIO AND PRINT



ONLINE

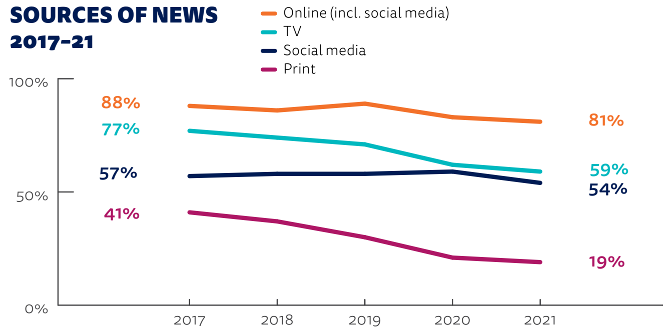


CHANGING MEDIA

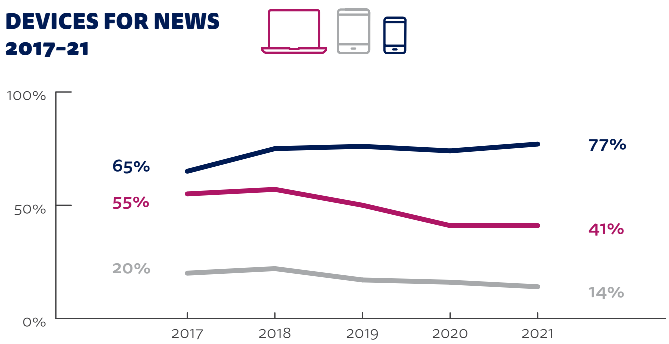
With the routine of most Taiwanese unaffected by the pandemic, news consumption has decreased in the past year across all media sources (television, print, internet, and social media). Print consumption has halved over the last five years.

14% pay for **ONLINE NEWS**

SOURCES OF NEWS 2017–21



DEVICES FOR NEWS 2017–21



TRUST

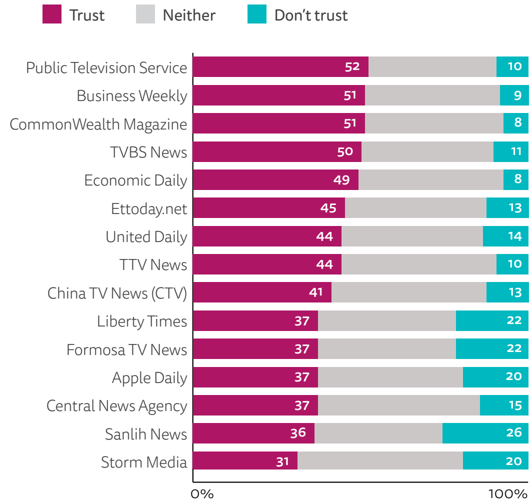
Trust in news has risen seven percentage points at a critical period. Public service television remains the most trusted in our survey, followed by the economic news media (*CommonWealth* and *Business Weekly*). The rest of the news brands in the polarised media landscape are trusted by one group, but distrusted by another.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
31% (+7) 42/46	**38%**

News in search	*News in social*
29%	**21%**

BRAND TRUST SCORES



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

33% **SHARE NEWS** via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Line	47%	(-2)	70%
2	Facebook	41%	(-6)	66%
3	YouTube	38%	(-3)	65%

Rank	Brand	For News		For All
4	PTT (bulletin board)	7%	(-1)	16%
5	Facebook Messenger	7%	(-1)	33%
6	Instagram	7%	(-1)	29%

THAILAND

STATISTICS

Population	**70m**
Internet penetration	**82%**

The media industry in Thailand is facing a period of profound change as a result of digital disruption and societal change. Student-led pro-democracy protests fuelled by social media have helped to open up the media that have long been reluctant to criticise the authorities.

YouTube and Facebook Lives were at the heart of the recent anti-establishment protests that started in 2020 but have continued through this year. Alternative media have built substantial audiences via social platforms, with content that often openly criticises the government and the monarchy – something that was previously unheard of in this strongly deferential country[136]. Facebook, YouTube, and Line are the most important networks, but Twitter and TikTok have also played essential roles in the protests, especially with younger users. Beyond news, Thais have embraced social platforms more widely, with celebrities and influencers playing a more prominent role.

Against this background, traditional broadcasters and newspapers have been struggling to adapt. The media are free to criticise government policies and cover instances of corruption and human rights abuses. But journalists tend to exercise self-censorship regarding the military, the monarchy, and other sensitive issues. They also face financial pressures as a result of digital change. Following an expensive battle to win digital television licences in 2014, many channels have had to close down due to financial losses. Only 15 of the licensed 24 stations are still broadcasting after failing to attract sufficient ratings and advertising revenue. In our survey, the top three television stations are Channel 3 HD, Thai Rath TV 32, and Channel 7 HD. Radio remains a popular medium in Thailand, with MCOT 100.5 News Network attracting most listeners.

There is often a blurry and somewhat symbiotic line between the alternative and traditional media. Some prominent journalists work for traditional media, but have also built up an independent profile online. On their own websites or via social media, they can tackle different subjects or be more outspoken. Some get additional income from donations or from product placement. In turn, mainstream media often report what is trending in social media, allowing them to extend the scope of their coverage without getting into trouble with the authorities.

The print media, which are largely privately run, include a handful of Thai-language dailies, including *Thai Rath Daily*, *Khaosod*, and *Daily News*. Many papers have found it hard to adapt to online, and some have closed (*M2F*) or have cut staff. *Post Today* and *The Nation* dailies transitioned to online-only in 2019. Newspapers do not charge subscriptions for online news in Thailand, relying instead on advertising income or from cross-subsidies from television if they are part of a bigger media brand.

The preferences of Thai people to watch or listen to the news rather than read has been much discussed. This puts further pressure on printed media – despite a number of government campaigns to get younger people to read. It also helps explain the popularity of Facebook Lives and YouTube as key ways in which journalism is delivered – often accessed from the markets or from public transport due to widely available 'unlimited data' packages from many telecom operators.

Smartphones have been widely adopted in Thailand and, for many, they are now the main or only access point for the internet and internet news. Mobile portals that aggregate news from different providers are a popular way to access news in Thailand – valued for their convenience. Both Line Today (36%) and Pantip.com (34%) are accessed by more than a third of our survey respondents weekly.

Our survey shows that the majority of Thais (61%) are concerned about being able to distinguish true and fake news on the internet, with topics such as COVID-19 and politics most frequently mentioned. The government passed a wide-ranging law, the Computer Crime Act, claiming to protect citizens[137]. But critics fear the vagueness of the provisions and harsh penalties could be used to stifle legitimate critics of the government.

Intense competition has led to a battle for attention amongst media companies, which in turn has increased levels of sensationalism and negativity in Thai journalism. Stories that involve insults or dramas tend to attract bigger audiences and are often spiced up with emojis or other visual accompaniments. For instance, crime stories are widely covered, with one recent murder suspect becoming a nationwide celebrity as a result of wall-to-wall media coverage. As a result, those that still practise more traditional journalism are getting left behind, and many worry about the future of serious investigations and documentaries.

Professor Jantima Kheokao
University of the Thai Chamber of Commerce,
and **Dhanaraj Kheokao**
Potsdam University, Germany

[136] https://reutersinstitute.politics.ox.ac.uk/risj-review/how-activists-and-digital-publishers-are-redefining-media-freedoms-thailand
[137] https://www.reuters.com/article/us-thailand-cyber-idUSKCN1QH1OB

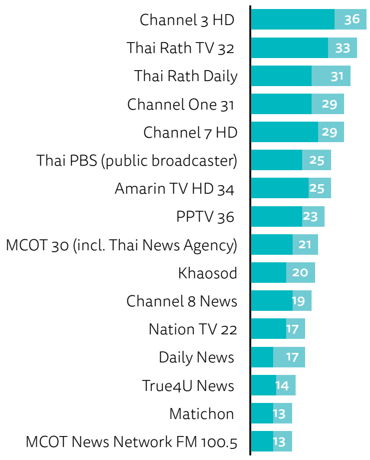
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

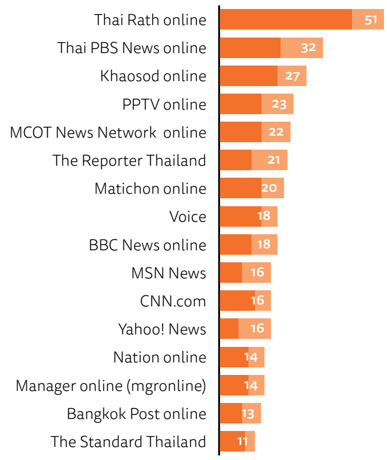
% Weekly usage

- 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 this (online) survey, online sources stand out as people's main source of information (91%), outperforming traditional media like TV (51%) and print (15%). Facebook (66%) and Line (56%) are the main social networks for accessing news.

SOURCES OF NEWS

TV **51%**

Online (including social media) **91%**

Print **15%**

Social media **78%**

DEVICES FOR NEWS

Computer **31%**

Smartphone **81%**

Tablet **19%**

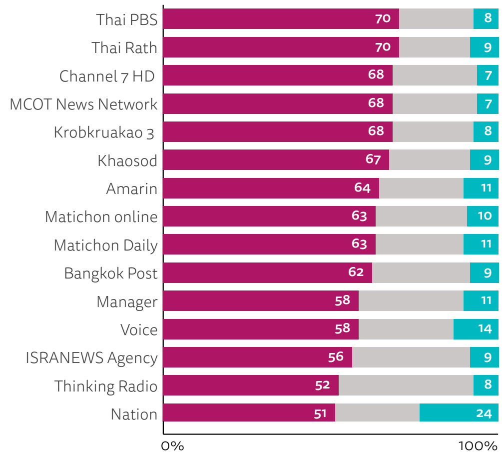
TRUST

Trust in the media (50%) is relatively high by regional standards, but traditional Thai deference towards institutions – including journalists – is starting to breakdown. Thai PBS and *Thai Rath* have the highest levels of brand trust, with the *Nation*, which came under fire in recent protests for a pro-establishment/its business owners' bias, least trusted. This may change following a recent transfer of ownership.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
50% =14/46	**50%**
News in search	*News in social*
46%	**38%**

BRAND TRUST SCORES



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

47%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	66%	80%
2	Line	56%	78%
3	YouTube	53%	79%
4	Facebook Messenger	27%	53%
5	Twitter	21%	32%
6	TikTok	14%	30%

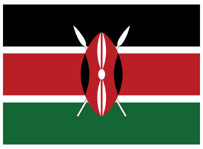
SECTION 3

Analysis by Country and Market
Africa

KENYA

STATISTICS

Population	55m
Internet penetration	85%



Kenyan media were suffering from pre-existing financial instability before the COVID-19 pandemic as they struggled to come to terms with digital disruption. Despite these challenges, the media are still a trusted source of news and the choices available to consumers continue to expand.

Kenya leads the region in internet connectivity, mobile phone use, and social media engagement and this in turn has made the country a pioneer in both digital consumption and innovation. Our survey shows that most of our Kenyan sample (83%) use a smartphone rather than a computer to access news each week and the GSMA estimates that Kenya will have seven million new mobile subscribers by 2025.[138]

For most Kenyans, though, free-to-air digital terrestrial TV still remains the most popular medium – with radio also reaching a significant proportion of the population via more than 150 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 study conducted by the Media Council of Kenya showed that just ten media owners – including the Nation Media Group, The Standard Group, Radio Africa Group (Star+), the Royal Media Services Group (Citizen TV, Citizen Radio, etc.), and Mediamax (People Daily, K24TV, Kameme FM) – dominate the landscape.[139]

Kenyan media are considered to be more vibrant when compared to others in the region. However, several laws restrict press freedom and incidents of harassment of journalists are rarely investigated. This and the high dependency on advertising leads self-censorship as the media are often afraid to ask hard questions about corporate failures and government corruption.

The Computer Misuse and Cyber Crimes Act of 2018, which criminalises falsehoods and misinformation and penalises those convicted with a fine of US$50,000 or a maximum of two years' imprisonment, has been used to harass journalists, bloggers, and other activists who have been critical of the government's handling of the new Coronavirus. The establishment of a multi-agency team to monitor, document, and enforce compliance with media broadcasting laws and social media guidance ahead of the 2022 general election has also had a chilling effect on press freedom. At least ten journalists and digital content creators have since been arrested or threatened with prosecution under the provisions of the Act. They have been accused of spreading false and alarming information on social media about the new Coronavirus.[140] At least ten others were arrested under the Public Order Act for allegedly flouting the curfew, even though journalists have been identified as essential service providers and therefore exempted from the curfew restrictions.

So-called 'fake news' is a phenomenon of deep concern for consumers, with the majority (75%) of those surveyed agreeing that they found it hard to distinguish between what is real and what is fake when it comes to news on the internet. Over half of our sample indicated that they had come across false or misleading information about health/COVID-19 (56%) or politics (63%) in the last week.

Restrictions around COVID-19 have affected the sales of print newspapers, partly due to fear of infection from surface contact and deprioritisation of spend on news in household budgets. Media organisations have reported losses and some, like the Nation and the Standard, are pinning their hopes on the growth of digital subscriptions, even though paying for news online is not popular with consumers. A digital tax introduced in January 2021, which is charged on subscription-based media, including news, magazines, and journals, may further dampen the expected growth. More than 300 journalists have lost their jobs as part of media cost-saving measures and those that remain have had to accept hefty salary cuts (between 30% and 50%).[141]

The Kenya Editors Guild and the Media Council of Kenya have suggested the creation of a media sustainability fund, but others worry that such a fund could make the media even more vulnerable to pressure from politicians, risking further undermining independence. An early casualty of the changing business circumstances is HiviSasa.com, a digital pioneer that closed after it was unable to identify a viable advertisement-led business model.

Several local media organisations have partnered with international news organisations such as the BBC, VOA, and DW to re-transmit their broadcasts. The Nation Media Group also joined the rapidly expanding podcast market when it launched Afripods, a new platform designed to showcase African content.

Catherine Gicheru
ICFJ Fellow and Director of the Africa Women Journalism Project[142]

[138] GSMA, 'Mobile Economy Africa', 2020. https://www.gsma.com/mobileeconomy/sub-saharan-africa/
[139] Council of Media of Kenya, Media Status Report, May 2012. https://issuu.com/mediacouncilkenya/docs/status_of_media_in_kenya_report
[140] https://www.article19.org/resources/kenya-journalists-attacked/
[141] https://www.theeastafrican.co.ke/tea/news/east-africa/kenyan-editors-in-plea-for-media-journalists-1444020
[142] https://theawjp.org/

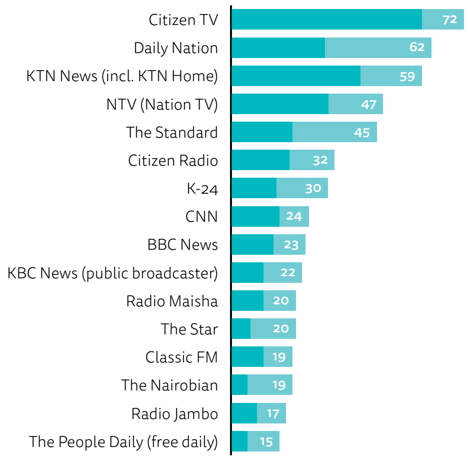
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

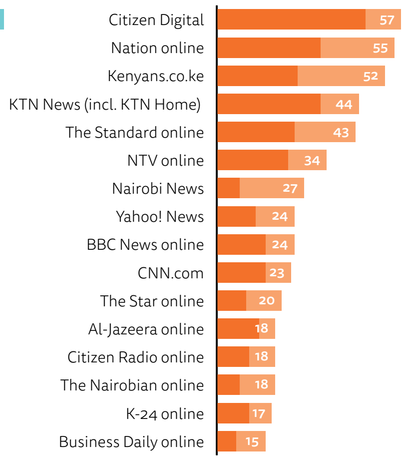
% Weekly usage

- **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



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

TV
73%
(-1)

Online (including social media)
88%
(-2)

Print
36%
(-11)

Social media
76%
(-1)

DEVICES FOR NEWS

Computer
49%
(-6)

Smartphone
83%
(-)

Tablet
9%
(-2)

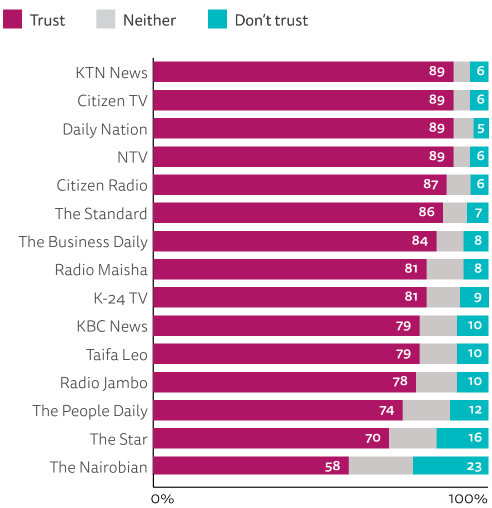
TRUST

Trust in media is relatively high by international standards, with 61% saying they trust most news most of the time. By contrast, trust is lower in the news found in social media or search engines. KTN News, Citizen TV, the *Daily Nation*, and NTV are the most trusted sources of news.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
61% (+11) =2/46	**65%**
News in search	*News in social*
55%	**40%**

BRAND TRUST SCORES



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

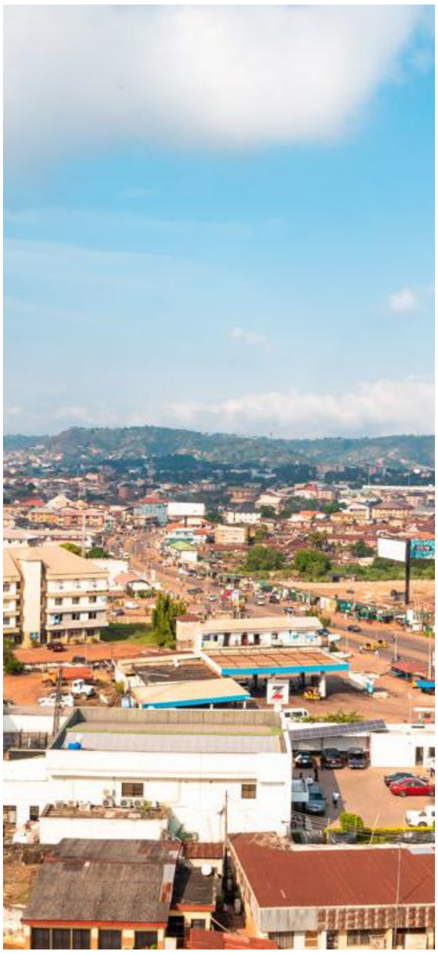
54%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	WhatsApp	64%	(-3)	88%
2	Facebook	62%	(-4)	79%
3	YouTube	47%	(-4)	78%

Rank	Brand	For News		For All
4	Twitter	34%	(-6)	49%
5	Instagram	22%	(-4)	47%
6	Facebook Messenger	20%	(-1)	46%

NIGERIA



STATISTICS

Population	**211m**
Internet penetration	**73%**

Nigeria's vibrant media scene is characterised by state and private broadcasters, popular international brands like the BBC and CNN, and more than 100 national and local print titles, many of which are struggling with digital transition. Relations between the media and the government are often difficult.

Nigeria's information minister's response to the announcement that Twitter had chosen to set up its first African office in neighbouring Ghana instead of Nigeria was to blame the media. He said the media had misrepresented the country when reporting protests calling for reforms to the Special Anti-Robbery Squad (#EndSARS), which spiked in October 2020. 'This is what you get when you de-market your own country,' the minister told reporters. 'Nigerian journalists were … painting Nigeria as a hell where nobody should live.'

It's indicative of the fractious relationship between the government and media, and indeed of the inimical conditions in which Nigerian journalists have to operate. The Media Foundation for West Africa said Nigeria was among the countries in the region where journalists are assaulted, attacked, or have had equipment seized and destroyed while covering COVID-19.[143] Journalists reported that, in some states, stories relating to the pandemic had to be approved by the taskforce set up by the state before they could be published. The 2021 World Press Freedom Index ranks Nigeria at 120 out of 180 countries, with journalists facing harassment, arrest, and prosecution when reporting on corruption and terrorism. Nigerian lawmakers are currently reviewing legislation, with a view to criminalising the dissemination of misinformation online. The law will enable the government to order internet shutdowns and block access to social media sites.[144]

The corollary to government attempts to influence the media is that independently owned news brands that are perceived to be free of political control come out best in our Brand Trust Scores. Channels TV is the most trusted brand at 84%, followed by *Vanguard* (82%), *The Punch* (82%), and the *Guardian* (80%) – all privately owned daily newspapers.

In terms of top news sources accessed, big offline brands like Channels TV and *The Punch* head the list, but international brands CNN and BBC are popular online with our respondents. *The Punch*, the *Guardian*, and *Vanguard* have seen more traffic and increased online revenue. Industry data show *The Punch*'s traffic increasing from 17.7 million visits in February to 28.8 million in March. *Daily Trust* also launched a new product called Trust TV with the aim to capture a younger audience.

As befits a population where 70% of citizens are below the age of 30, news consumed on mobile (84%) is more than double the number of readers on computers (41%), while tablets lag behind at 11%. Nigeria has relatively low data charges, ranking 43rd on the recent 230 country list of mobile data pricing.[145] This enables the high usage of social media, a fertile ground for the spread of misinformation, which includes claims that consuming cow urine, or a mixture of garlic and honey, cures COVID. The impact is exacerbated by the fact that misinformation on social media can migrate to legitimate news sites.[146]

The COVID-19 pandemic saw a number of media organisations come up with innovative ideas to quell the spread of misinformation by ensuring fact-checked information was available in a number of languages. BBC Africa launched a minute-long broadcast that aimed to provide an educational aspect as well as provide the audience with updated information. This broadcast segment was also published on the phone app of mobile company MTN.

However, in line with global trends, the pandemic adversely affected advertising spend in Nigeria, with analysts forecasting that Nigerian newspapers may be forced to cut about 10% of staff.[147]

Independent radio network Dandal Kura International reported that it had cut salaries – for some people by as much as 80% – and at least a third of the staff were instructed not to attend work due to pandemic-related cuts in advertising spend. *Punch* reduced its newspaper page count from 48 to 32 pages, and retrenched workers. The *Nation* cut 100 of its staff, a 20% reduction.

There are many other examples of what is a drastic cut in income for journalists, and a decline in media resources, with the Nigeria Union of Journalists pointing out that only state-owned outlets were relatively unaffected. This is an unequal dynamic between independent journalism and state-controlled media and is not an environment currently conducive to the thriving of a free press.

Adaugo Isaac and **Chris Roper**
Code for Africa

Editor's note: After being provided with new evidence, we have removed the assertion that Punch had to cut staff salaries for the reported period.

143 https://www.voanews.com/press-freedom/west-africas-press-freedoms-risk-during-coronavirus
144 https://www.voanews.com/press-freedom/rights-groups-sound-alarm-over-waning-press-freedoms-nigeria
145 https://www.cable.co.uk/mobiles/worldwide-data-pricing/
146 https://www.pri.org/stories/2020-03-06/nigeria-fights-fake-news-about-coronavirus
147 https://gijn.org/2020/04/27/coronavirus-may-spell-the-end-for-many-of-africas-print-newspapers/

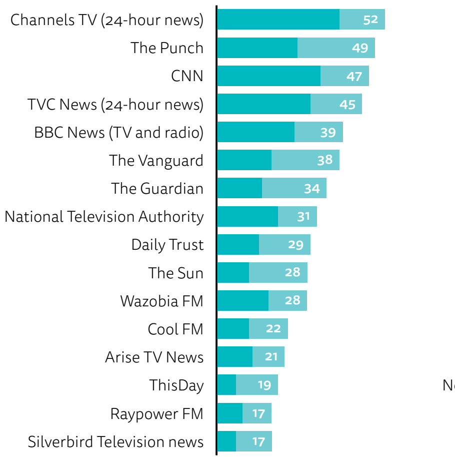
WEEKLY REACH OFFLINE AND ONLINE

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

TV **66%**

Online (including social media) **94%**

Print **28%**

Social media **78%**

DEVICES FOR NEWS

Computer **41%**

Smartphone **84%**

Tablet **11%**

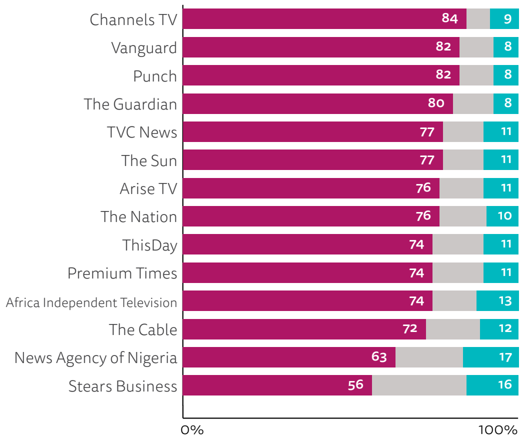
TRUST

Trust in news is relatively high by international standards (54%), with particularly high scores for independent news brands. By contrast, social media trust is at a low 38%, despite 78% of respondents saying they get news from social media. WhatsApp and Facebook lead at 65% and 63% respectively as sources for news each week.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
54% =7/46	**60%**
News in search	*News in social*
55%	**38%**

BRAND TRUST SCORES



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

59%

SHARE NEWS

via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	WhatsApp	65%	88%
2	Facebook	63%	82%
3	Twitter	44%	58%

Rank	Brand	For News	For All
4	YouTube	34%	70%
5	Instagram	34%	63%
6	Telegram	23%	50%

SOUTH AFRICA

STATISTICS

Population	60m
Internet penetration	58%

South Africa has one of the most diverse and independent media in Africa with a high degree of press freedom. But structural change combined with the effects of the COVID-19 pandemic are putting intense pressure on the finances of news organisations – at the same time as increasing demand for authoritative and fact-based news.

All large media houses in South Africa have seen a precipitous decline in circulation and revenue for print over the last year, with a concomitant knock-on effect for some of their digital products. As an example, circulations for daily newspapers are down by 40%, on average, for Q2 2020/2021.[148] Our Digital News Report survey shows that print as a source of news has dropped to 32%, 5pp down from last year. It can only be a matter of time before we see more print titles closing.

Not all the indicators are discouraging. Several news sites have built sustainable businesses, with the likes of Daily Maverick and Netwerk24 operating effectively on an amalgam of membership/subscription models and advertising, and investigative specialists amaBhungane on donor funding. Relatively new to the subscription model game is News24, the country's leading news site (73% of people surveyed access it at least weekly) and joint most-trusted brand with the BBC. Launching their paywall in August 2020, they reached 20,000 subscribers in the first two months.

Incredibly, in the midst of a pandemic and a generally disastrous revenue environment for news, the Daily Maverick launched a weekly, high-quality print publication called *DM168* in September 2020. Benefiting from an innovative partnership with the loyalty scheme of a major supermarket chain, Daily Maverick claim a circulation of 31,000 copies per week for the seven weeks leading up to end March. Too new to feature in this year's survey, the newspaper undoubtedly benefits from the Daily Maverick's growing reach online (up from 11% to 19%) and growth in trust from 60% in 2020 to 66%.

The Daily Maverick was, however, responsible for an egregious editorial blunder when they published a story in February 2021 by renowned investigative journalist Jacques Pauw, in which he apparently concocted details of false arrest and police harassment. The DM and journalist issued apologies, but the incident was seized upon by those eager to discredit reputable media. Trust in media is, however, based on a number of variables. Independent Online, the digital channel for Independent Media, scores just one percentage point (65%) below the Daily Maverick (66%), despite having embarked on a dizzying spiral of publishing misinformation and blatantly invented news.[149] Its daily newspaper, *The Star*, which lost 60% of its circulation Q2 2019–20, is placed just above with a trust score of 68%.

A notable mover in the survey is television channel eNCA, whose trust score is up 4pp to 82%, making it the third most trusted brand in South Africa, a position it also held last year. eNCA's television reach jumped 18pp to 58%, making it the most accessed offline brand, pushing the SABC into second place at 53%. Its online reach also jumped 15pp. This was despite eNCA being fined by the Broadcasting Complaints Commission of SA for contravening the Broadcast Code by featuring conspiracy theorist and COVID-19 denialist David Icke on one of their talk shows. In March 2021, the SABC cut back over 621 of their 3,000 employees, significantly impacting the public broadcaster's ability to provide a wide range of services in multiple languages.

As is the global norm, social media platforms have become an important arena for corrupt politicians, criminal businesspeople, and conspiracy theorists in their attempts to discredit news media. For example, there is an active, self-titled Radical Economic Transformation group that attacks journalists reporting on the corruption hearings around former president Jacob Zuma, attempting to paint the reporting as either racist propaganda or by media biased toward a particular government faction.[150]

The *DNR* shows that concern about misinformation is higher in Africa (74%) than other regions, with the global average at 58%. In South Africa, there have been calls by politicians for Facebook to be summoned to parliament to discuss steps to fight misinformation on its platforms. Facebook owns three of the top six platforms used by South Africans – with WhatsApp (88%) and Facebook (78%) the most used networks for any purpose and for news. Generally, the economic and trust pressures on media that the big platforms facilitate are mirrored by the political environment, with a range of interest groups invested in problematising the notion of truth, particularly with reference to investigative media.

Chris Roper
Deputy CEO, Code for Africa

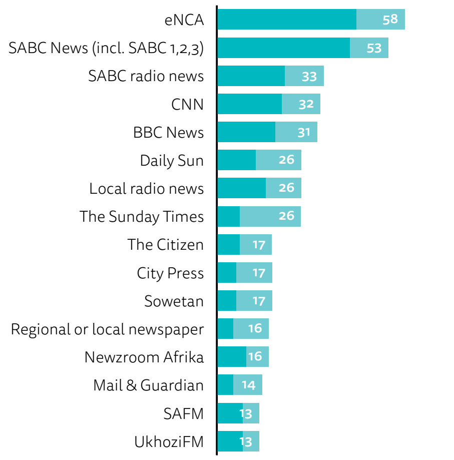
[148] https://www.moneyweb.co.za/news/south-africa/the-terrifying-collapse-of-newspapers-is-here/
[149] https://www.dailymaverick.co.za/article/2019-11-25-iqbal-surves-campaign-of-lies/
[150] https://www.dailymaverick.co.za/opinionista/2021-03-30-beware-the-rising-intensity-of-warfare-against-democracy-and-south-africas-constitution/

WEEKLY REACH OFFLINE AND ONLINE

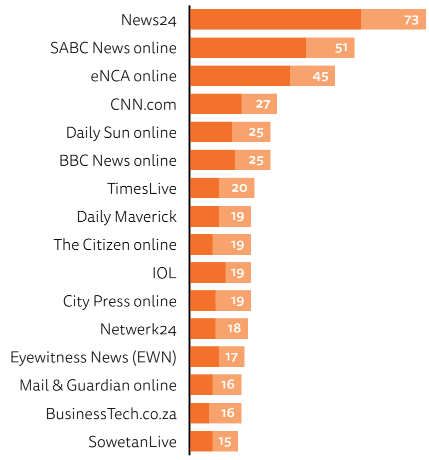
TOP BRANDS
% Weekly usage

- **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



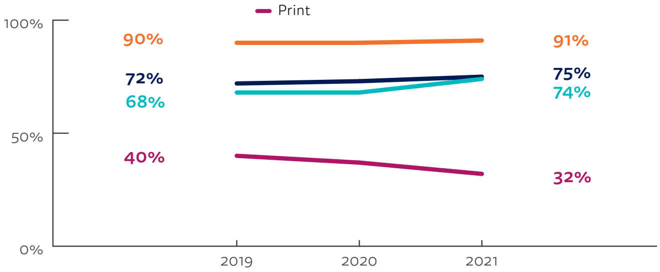
ONLINE



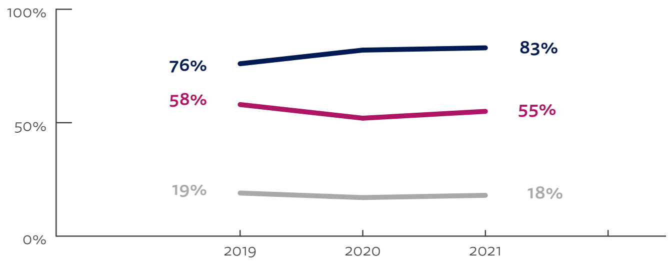
METHODOLOGY NOTE

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 2019–21



DEVICES FOR NEWS 2019–21



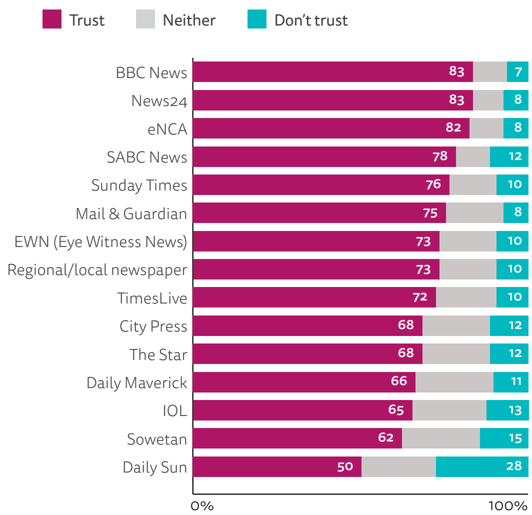
TRUST

Despite some high-profile editorial errors, and a concerted effort by agents of misinformation to attack media credibility, 2021 saw a growth in trust in news overall (52%, up 4pp from 2020). It's possible that the surfacing of the debate has educated users in understanding, and placing value on, the editorial integrity of trusted brands.

DIFFERENT TYPES OF TRUST

News overall	News I use
52% (+4) 12/46	57%
News in search	**News in social**
47%	29%

BRAND TRUST SCORES



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

61%
SHARE NEWS
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	55%	(-2)	78%
2	WhatsApp	52%	(+3)	88%
3	YouTube	39%	(-)	77%
4	Twitter	28%	(+5)	44%
5	Instagram	17%	(-)	46%
6	Telegram	13%	(+8)	34%

SECTION 4

References and Selected Publications

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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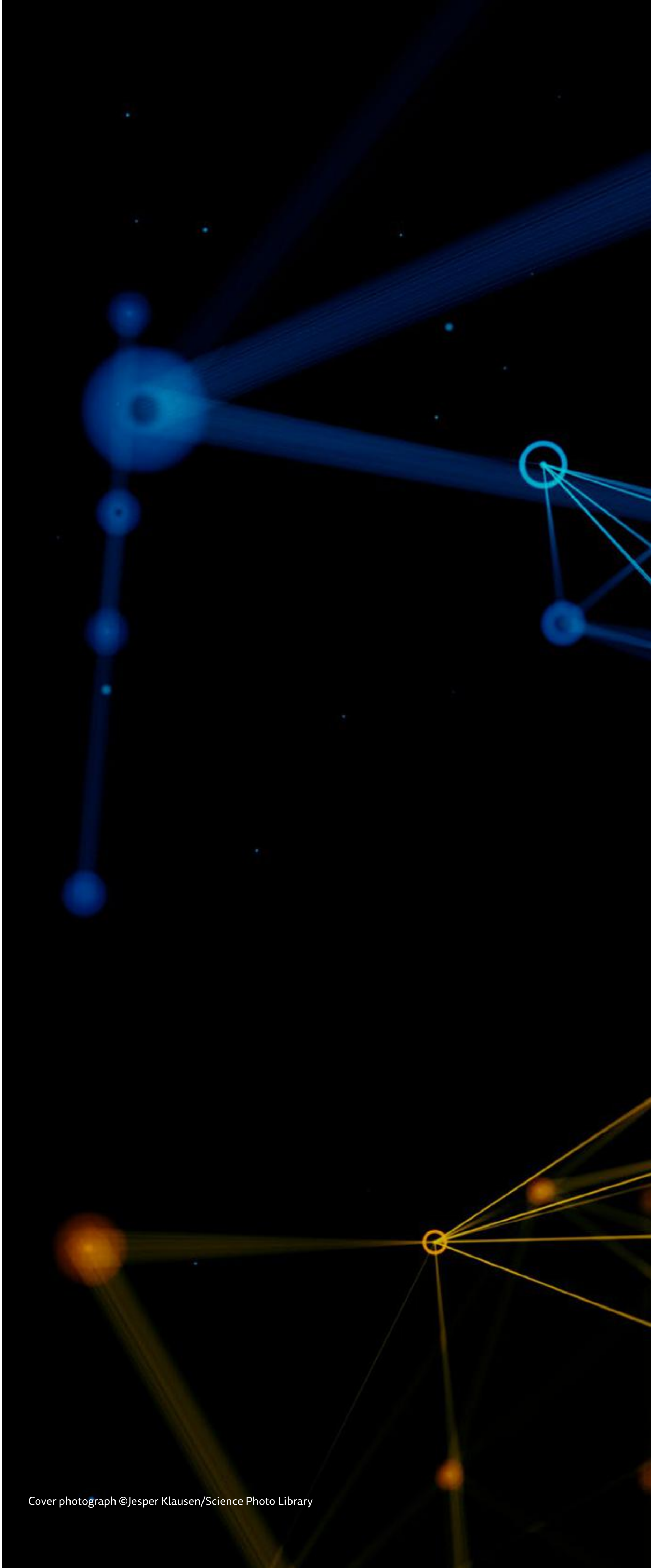

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