Reuters Institute
for the Study of Journalism

REUTERS INSTITUTE DIGITAL NEWS REPORT 2016

ASIA-PACIFIC SUPPLEMENTARY REPORT

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ASIA-PACIFIC SUPPLEMENTARY REPORT

Kruakae Pothong and Rasmus Kleis Nielsen

Survey by

YouGov®
What the world thinks

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CONTENTS

FOREWORD

Dr Rasmus Kleis Nielsen
Director of Research | Reuters Institute for the Study of Journalism

This report presents a systematic analysis of the digital media environment across a range of markets in the Asia-Pacific region. It builds on our main annual Reuters Institute *Digital News Report*, which we have published since 2012, but goes beyond it in terms of paying special attention to a set of highly developed markets that are in some ways very different from those in Europe and North America. Three beliefs form the background to the report.

(1) we are currently living through some fast-paced and truly global changes in how people find and access news, changes that in turn impact both the profession of journalism and the institutions that sustain it, and that both journalists, industry leaders, and other stakeholders therefore need to pay close attention to.

(2) that though some of these changes are genuinely global – most importantly the rise of digital, mobile, and social media – the ways in which they play out depend enormously on context, including cultural, economic, and political differences, and that every country and region of the world therefore is likely to differ in important ways.

(3) that it is particularly important to understand the highly developed markets found in the Asia-Pacific region, with their vibrant digital media environments, very high levels of smartphone use, and high levels of social media use, if we are to see the different ways in which other media markets may develop in the future.

The report comes against the backdrop of a continued move towards a more digital, more mobile, and more distributed media environment – a move some suggest is a zero-sum game where large technology companies are quickly marginalising news media companies. The data presented here complicate that story. Without dismissing the serious strategic challenges ahead for news media organisations, it is important to note that in all four markets we focus on here, news media organisations remain widely used and very important sources of news, both in terms of people coming directly to them and in terms of a high reliance on mobile notifications from apps and SMS, even as people also rely on search and social media.

We hope this pilot study will help us build towards further analysis of developments in the region, not only in terms of how people use news, but also how news media organisations, technology companies, and media policymakers are navigating this changing environment. It is sometimes easy for those based in America and Europe to forget that things are different elsewhere, and that much can be learned from paying close attention. More than half of the world's internet users live in Asia, and developments in the region have global implications.

The pilot study is funded by the Reuters Institute for the Study of Journalism in line with our commitment to doing truly global research of relevance to journalists and news media all over the world. The report furthermore builds on the main Reuters Institute *Digital News Report*, which is supported by a wide network of sponsors: Google, the BBC, Ofcom, the Broadcasting Authority of Ireland (BIA), the Media Industry Research Foundation of Finland, the Fritt Ord Foundation in Norway, the Korea Press Foundation, Edelman UK, as well as our academic sponsors at the Hans Bredow Institute, the University of Navarra, the University of Canberra and the Centre d'études sur les médias, Université Laval, Canada.

We are also grateful to YouGov, our polling company, who did everything possible to accommodate our complex requirements, especially Charlotte Clifford who helped us analyse and contextualise the data. Finally, we are particularly grateful to Nic Newman, the lead author of the main Reuters Institute *Digital News Report* for his work in leading that ambitious project since the beginning; to Richard Fletcher, the lead researcher on the main report, for his advice and help; to David Levy for his support for this pilot study; and to Alex Reid for managing the process of moving from manuscript to publication with her usual patience and skill.

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 markets in the Asia-Pacific region. The report combines data from (1) our main *Digital News Report* with a full survey fielded by YouGov using an online questionnaire at the end of January/beginning of February 2016 across 26 countries and (2) an additional pilot study with a selection of the same questions and a smaller sample conducted across an additional four markets in Asia-Pacific in April 2016 – Hong Kong, Singapore, Taiwan, and Malaysia.

- The data were weighted to targets based on census/industry accepted data, such as age, gender, region, newspaper readership, and social grade, to represent the total population of each country. The sample is reflective of the population that has access to the internet, which is over 80% in Hong Kong, Singapore, and Taiwan but a lower 68% in Malaysia.
- As this survey deals with news consumption, we filtered out anyone who said that they had not consumed any news in the past month, in order to ensure that irrelevant responses didn't adversely affect data quality. In the four new markets, the figure ranged from 1% (in Hong Kong and Taiwan) to 6% (in Singapore).
- For the pilot study, we selected key questions from the comprehensive online questionnaire deployed in the main study to capture all aspects of news consumption and fielded these in the four new markets.
- The USA, UK, South Korea, Japan, and Australia – all covered in full in the main survey – are used here to provide context to the four markets in this pilot study.

Both the main survey and the pilot study were conducted online and as such the results will under-represent the consumption habits of people who are not online (typically older, less affluent, and with limited formal education). Where relevant, we have tried to make this clear within the text. It is particularly important to keep in mind when looking at results from Malaysia, where almost one-third of the population is not online. The main purpose, however, is to track the activities and changes over time within the digital space as well as gaining understanding about how offline media and online media are used together. A fuller description of the methodology and a discussion of non-probability sampling techniques can be found on our website, www.digitalnewsreport.org.

	HONG KONG	MALAYSIA	SINGAPORE	TAIWAN	AUSTRALIA	JAPAN	SOUTH KOREA	UK	USA
Start sampling	1,077	1,045	1,065	1,015	2,201	2,075	2,184	2,171	2,391
Non new users	1%	4%	6%	1%	8%	3%	2%	7%	8%
Final sample size	1,061	1,006	1,002	1,002	2,021	2,011	2,147	2,024	2,197
Total population	7,141,106	30,513,848	5,674,472	23,415,126	22,751,014	126,919,659	49,115,196	64,767,115	321,368,864
Internet penetration	81%	68%	82%	84%	93%	91%	92%	92%	87%

Source: Internet World Stat http:www.internetworldstats.com internet population estimate 2015

AUTHORSHIP AND RESEARCH ACKNOWLEDGEMENTS

Dr Kruakae Pothong is a Research Fellow at the Reuters Institute for the Study of Journalism and has led the research and analysis on this pilot study of four new Asia-Pacific markets (Hong Kong, Malaysia, Singapore, and Taiwan). More generally, her work focuses on online news media consumption, users and young people's internet experience, internet and net neutrality policies, as well as the politics of the policymaking process concerning these issues. Forthcoming publications include *The Internet on Trial: How Children and Young People Deliberated about their Digital Rights* (with Stephen Coleman, Elvira Perez Valleios, and Ansgar Koene).

Dr Rasmus Kleis Nielsen is Director of Research at the Reuters Institute for the Study of Journalism and Editor-in-Chief of the *International Journal of Press/Politics*. His work focuses on changes in the news media, political communication, and the role of digital technologies in both. He has done extensive research on journalism, American politics, and various forms of activism, and a significant amount of comparative work in Western Europe and beyond. Recent books include *The Changing Business of Journalism and its Implications for Democracy* (2010, edited with David A. L. Levy), *Ground Wars: Personalized Communication in Political Campaigns* (2012), and *Political Journalism in Transition: Western Europe in a Comparative Perspective* (2014, edited with Raymond Kuhn).

Country-level commentary and additional insight around media developments has been provided by Prof. Anthony Y. H. Fung, Dr Ming-Yeh Rawnsley, Nur Kareelawati Binti Abd Karim, Meera Selva, academic partners, and by our network of Reuters Journalist Fellows around the world.[1] We are very grateful for their help.

Additional expert analysis and interpretation of the survey data were provided by the team at YouGov, in particular, Charlotte Clifford, Ash Strange, Ema Globyte, and Stephanie Frost.

[1] 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.

EXECUTIVE SUMMARY

This report presents an analysis of news and media use in a range of markets in the Asia-Pacific region. It is based on a survey of online news users.

The report expands the work presented in the 2016 Reuters Institute *Digital News Report* by complementing data from that survey of 26 countries with additional data from a pilot survey of an additional four markets in the Asia-Pacific regions (Hong Kong, Malaysia, Singapore, and Taiwan).

We present here an overview of key trends in news media use across these four markets and compare the patterns observed with those found elsewhere in the Asia-Pacific region (Australia, Japan, South Korea) and in selected markets in Europe and North American (the UK and the US) to shed light on similarities and differences.

In the report, we show the following:

- Several markets in the Asia-Pacific region are significantly more technologically developed than most of Europe and North America in terms of the importance of digital news, the reliance on smartphones, and the role played by digital intermediaries like aggregators, search engines, and, especially, social media.
- At least seven in ten respondents in the four new markets say they have used a smartphone to access news in the last week. Hong Kong, Singapore, and Malaysia are all smartphone-first markets where more people say smartphones are their main device for accessing news than mention desktop. In Taiwan smartphones and desktops are tied.
- Social media are a significant gateway to news across all the markets covered here. In Singapore and Malaysia, a quarter of our respondents name social media as their main source of news. This is far higher than in the US or the UK.
- Mobile alerts via SMS and apps are more widely used as sources of news in most of these markets than elsewhere, suggesting how important these channels – and older ones like email newsletters – can be for news media fighting for relevance in an increasingly mobile and distributed media environment.
- The rise of mobile and social media has not by itself marginalised news media brands, who continue to be important sources of news across devices and channels. This is important for news media brands elsewhere who may fear that the rise of mobile media and digital intermediaries will inevitably marginalise news media.
- There are significant differences in how news media are used across the markets covered. It is clear that one can no more generalise easily across the Asia-Pacific region than any other region. Broadly speaking
    - Hong Kong, Singapore, and Taiwan have highly developed digital media markets with a high reliance on mobile devices, a large role played by intermediaries, and strong news media online. In these markets, social media are widely used for accessing news and for commenting/sharing. (Online news users in Malaysia report some of the same habits and preferences, but as internet use is lower there and our survey is an online poll, their behaviour is less representative of the wider population.)

  - In contrast, Japan and South Korea, covered in greater detail in the main *Digital News Report*, combine highly developed digital media markets with a greater reliance on desktop computers, a more prominent role for aggregators and portals, and a more limited role for news media brands online. In these markets, social media are widely used, but not for accessing news and commenting/sharing.
  - Australia, also covered in greater detail in the main *Digital News Report*, has more in common with many markets in North America and Western Europe. Digital news is important, but for most users still accessed via desktop more than smartphones, social media are a widely used source of news, but television even more so, and levels of engagement with and participation in online news lower.
- Trust in news remains tied to news media brands more than to journalists and varies significantly from market to market, between markets like Hong Kong and Singapore with high levels of trust, and markets like Taiwan and especially Malaysia with much lower levels of trust – more akin to those seen in South Korea and the US.
- Perceptions of whether news is free from undue political and/or commercial influence also varies, with significant numbers of people worrying about undue influence in Taiwan and especially Malaysia and much lower numbers in Hong Kong and Singapore.
- Importantly, variation in trust in the news and perceptions of whether news is subject to undue political and/or commercial influence do not have a direct, simple relationship with assessments of media freedom by outside observers like Freedom House or Reporters without Borders.

At the end of the report, we provide profiles of the four markets original to this report (Hong Kong, Malaysia, Singapore, and Taiwan). Country profiles of the three other Asia-Pacific markets (Australia, Japan, and South Korea) as well as for the international comparators (the UK and the US) can be found in the Reuters Institute *Digital News Report* 2016 and on the project website, www.digitalnewsreport.org.

ANALYSIS AND INTERNATIONAL COMPARISON

ANALYSIS AND INTERNATIONAL COMPARISON

SMARTPHONE-FIRST MARKETS

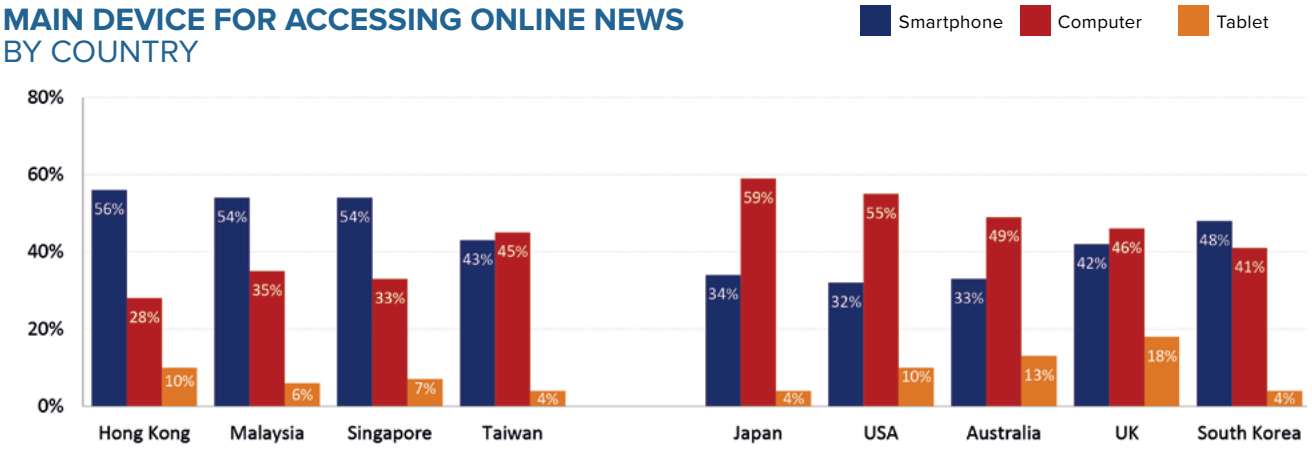
At least seven in ten internet users in the four new markets use smartphones to access online news. Hong Kong, Malaysia, and Singapore are all smartphone-first markets, with significantly more people naming their smartphone as the main device for accessing news than name desktops or tablets. In Taiwan, smartphone use is high, but tied with personal computers.

These levels of smartphone use for news exceed that of almost all the 26 countries covered in the 2016 *Digital News Report*. Across the countries covered in the main report, about half say they use smartphones for news, and little more than one in five named smartphones their main device for online news. No countries saw as high levels of smartphone use as Hong Kong, Malaysia, Singapore, and Taiwan, with even highly developed markets like the UK and the US, and other Asia-Pacific markets like Australia, Japan, and South Korea, trailing behind.

Across Hong Kong, Malaysia, Singapore, and Taiwan we see the same pattern as in Japan, South Korea and many other markets, with tablets far less popular for news than smartphones and personal computers. Of respondents in the new markets 10% or less use a tablet as their main device to access online news, lower than for example in the UK (18%) and on par with for example the USA (10%).

Overall, the high level of smartphone usage across the Asia-Pacific markets is related to the development of the digital infrastructure. Most of the smartphone-first countries have a high level of access to smartphones and mobile broadband, comparable to or exceeding those seen in Europe and North America. Malaysia is an exception. According to the Broadband Commission for Digital Development, the level of access to mobile broadband in Malaysia was recorded at 58% in 2014, and the smartphone penetration rate was significantly lower than in more affluent markets like Hong Kong, Singapore, and Taiwan.[2] The central role of smartphones amongst those in Malaysia who do have access to the internet is, however, in line with what we see in other markets with lower levels of internet access (like Brazil, Poland, and Turkey), where smartphones are more important than desktop computers for accessing news online – an example of the wider, global, move to a mobile-first internet.

MAIN DEVICE FOR ACCESSING ONLINE NEWS BY COUNTRY



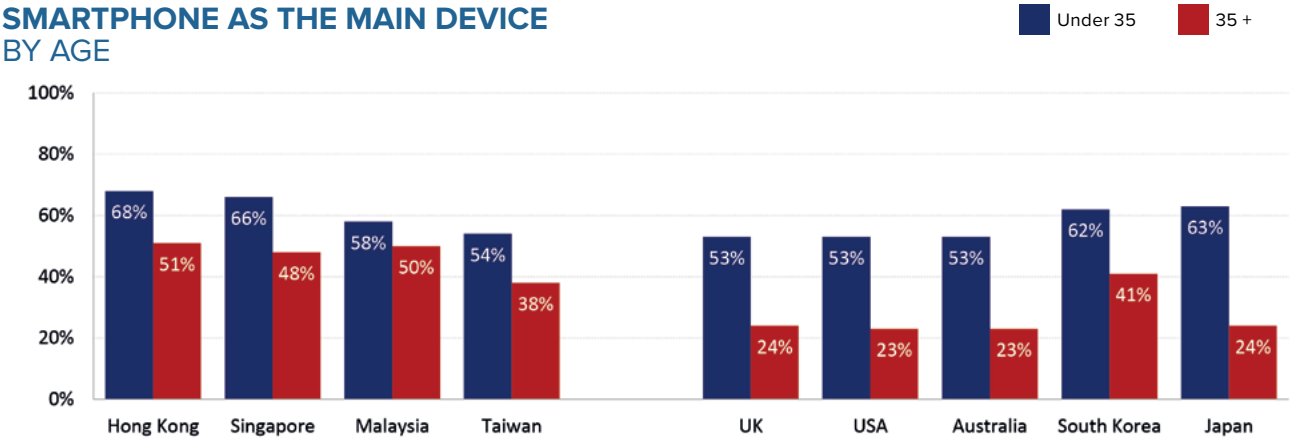
UK8b6_5. You've said you use the following devices to access news in the last week, which is your MAIN way of accessing online news?
Base: All who use any device for news (UK = 1691, USA = 1888, Australia = 1721, Japan = 1811, South Korea = 1962, Taiwan = 970, Hong Kong = 1005, Singapore = 952, Malaysia = 949)
Note: Data for each country do not add up to 100% because the small proportion who selected another digital device as their main device for news is not shown.

[2] The Broadband Commission's report is based on data from the ITU World Telecommunication/ICT Indicators database which can be accessed from http://www.broadbandcommission.org/documents/reports/bb-annualreport2015.pdf

SMARTPHONE BEATS OTHER DEVICES, ESPECIALLY FOR THOSE UNDER 35

In terms of main device for accessing news, the basic pattern is the same across Asia-Pacific as that seen elsewhere. Younger people overwhelmingly name smartphones as their main device for news, whereas older people more frequently rely on desktop computers. There is a clear break between those under and those over 35, as can be seen in markets like Australia, Japan, the UK, and the US, and to a lesser extent in South Korea and Taiwan. But smartphones are far more widely used to access news in Hong Kong, Singapore, and Malaysia, where smartphones are more important than desktop computers even in the older age groups.

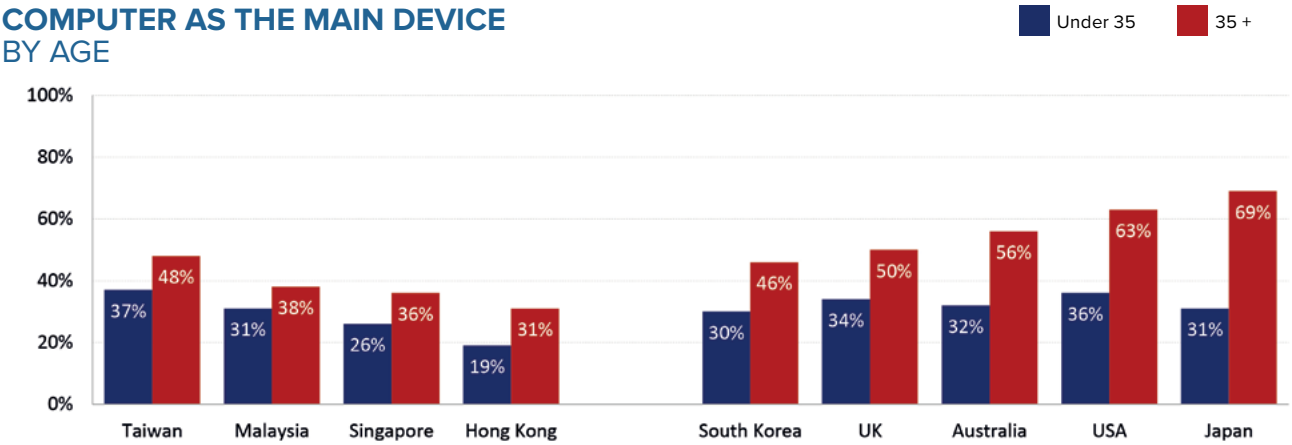
SMARTPHONE AS THE MAIN DEVICE BY AGE



UK8b6_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 (Under 35): Hong Kong: 330; Malaysia: 433 ; Singapore: 321; Taiwan: 382; Australia: 508; Japan: 427; South Korea: 677; UK: 372; USA: 429.
Base (35+): Hong Kong: 675; Malaysia: 516; Singapore: 631; Taiwan: 588; Australia: 1213; Japan: 1384; South Korea: 1285; UK: 1319; USA: 1462.

Given these systematic differences between generational cohorts that have (under 35) or have not (over 35) grown up with digital media, a country's overall demographics clearly influence how quickly new forms of media use become dominant. The population in many European countries and countries like Japan, for example, skew heavily towards the over-35 cohorts, whereas several of the other Asia-Pacific markets covered here have younger populations, and in part for this reason have seen a faster move to digital, mobile, and social media.

COMPUTER AS THE MAIN DEVICE
BY AGE



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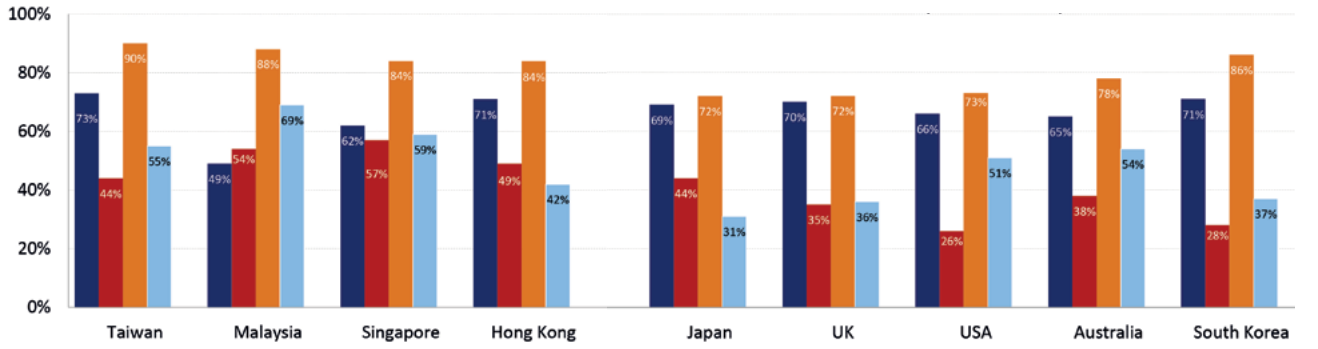
ONLINE MOST WIDELY USED SOURCE OF NEWS – DRIVEN BY BOTH NEWS MEDIA AND SOCIAL MEDIA

Among those with access to the internet, news media websites/apps and social media are the most widely used source of news in all the four new markets. In Malaysia, social media even overtake television alone in terms of reach amongst internet users.

This is broadly in line with what is seen in other highly technologically developed markets including both other Asia-Pacific markets like Australia, Japan, and South Korea, as well as markets like the UK and the US. It sets the four new markets covered here apart from other European countries like France and Germany, where television is still more widely used for news than online media, even amongst internet users.[3]

SOURCES OF NEWS BY COUNTRY



Q3. Which, if any, of the following have you used in the last week as a source of news? (Please select all that apply)
Base: All markets 2016 – Hong Kong: 1061; Malaysia 1006; Singapore: 1002; Taiwan: 1002; Australia: 2021; Japan: 2011; South Korea: 2147; UK: 2024; USA: 2197.

[3] See Newman et al. 2016.

ONLINE AS THE MAIN SOURCE OF NEWS – WITH BOTH NEWS MEDIA WEBSITES AND SOCIAL MEDIA IMPORTANT

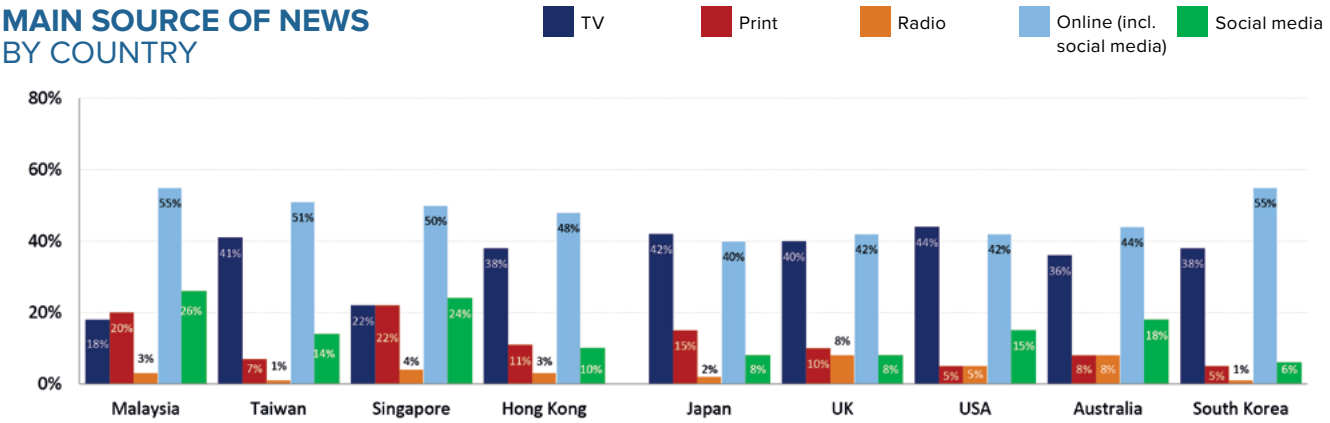
Online media are not only widely used, but are also most frequently named the main source of news in Hong Kong, Malaysia, Singapore, and Taiwan.[4] This is similar to what we see in other highly technologically developed markets like Australia, South Korea, and parts of Northern Europe, where online news has also overtaken television. (In Japan, as in the US, online and television are tied in terms of the number of people who name them as their main source of news.)

People get online news from a variety of different sources, including the websites and apps of news organisations and via social media. Taking a closer look at the different sources of news people say they have used in the past week, and the ones they identify as their main source, we can see that both news media and social media have significant reach, but generally, a higher proportion of those who say they use news media websites as a source of news also name these sites their *main* source of news.

Here, Malaysia in particular stands out as a country in which social media are not only widely used for news, but also the most frequently named main source of news. In Singapore, social media are tied with television and newspapers in the number of people who name them their main source of news. In both these markets, television is mentioned far less frequently as a main source of news than in most other markets, and newspapers significantly more frequently, a testament to the strength of titles like the *Straits Times* and *Today* in Singapore, *Sin Chew* and *The Sun* in Malaysia.

In the other markets, like Hong Kong, we see a pattern similar to that seen in most other countries covered in the *Digital News Report* – social media are widely named as a source of news, but more rarely as the main source of news. In some markets, the use of social media as a main source of news is lower than 10%. In addition to Hong Kong, this is the case in markets like the UK, Japan, and South Korea. Radio is mentioned far less frequently as a main source of news across the Asia-Pacific markets than in countries like the UK or the US.

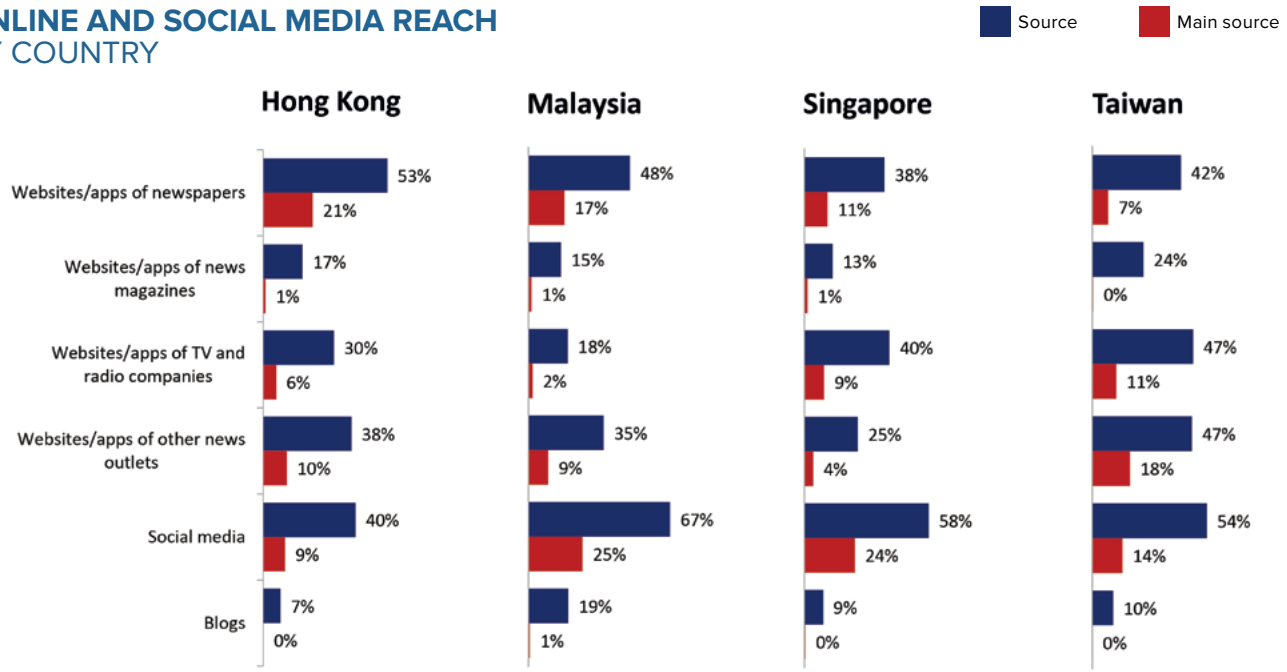
MAIN SOURCE OF NEWS BY COUNTRY



Q4. You say you've used these sources of news in the last week , which would you say is your MAIN source of news?
Base: All who have used at least one source of news in the last week (Hong Kong: 1055; Malaysia: 996; Singapore: 993; Taiwan: 1000; Australia: 1949; Japan: 1920; South Korea: 2095; UK: 1960; USA: 2107.)
Note: Data does not add up to 100% because the small proportion who selected another source as their main source of news are not shown.

[4] A reminder that as our survey relies on an online panel, it will under-represent the behaviours of those who are not online, particularly in countries like Malaysia where the internet is still far from universally accessible.

ONLINE AND SOCIAL MEDIA REACH
BY COUNTRY



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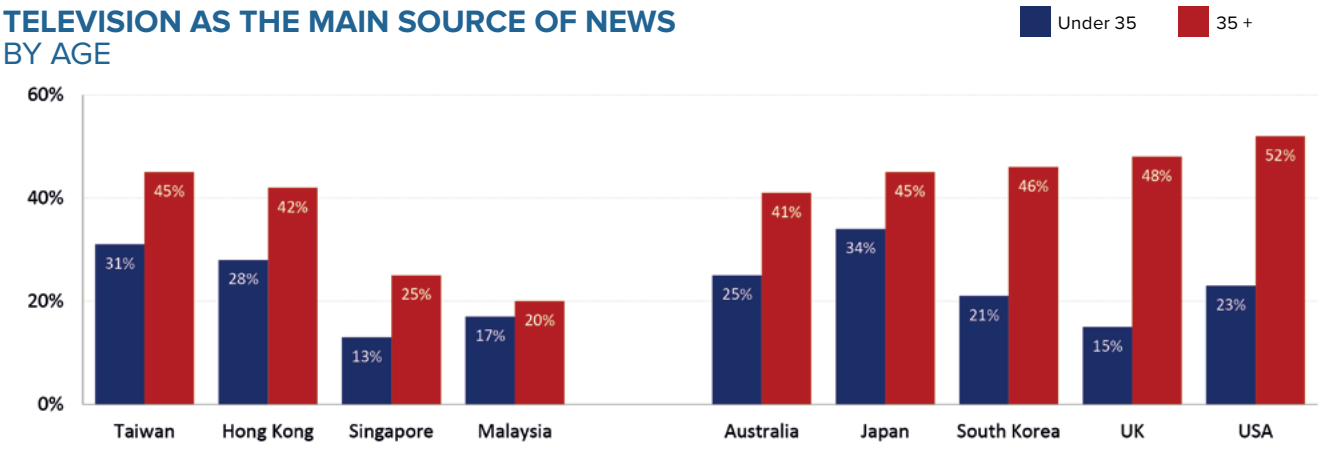
TELEVISION AND PRINT FAR MORE POPULAR WITH THOSE OVER 35, ONLINE LESS SO

There are clear generational differences not only in how people access news, but also what sources they use. Across the Asia-Pacific markets as elsewhere, older people are significantly more likely to name television and print their main source of news than those who are under 35. The pattern is similar to that seen for the choice of smartphone versus desktop as the main device for accessing online news.

Similarly, our data show that those under 35 are far more likely to name online media their main source of news, and much less likely to name television and (in most markets) printed newspapers. These patterns are broadly similar to those seen across most of the 26 countries covered in the main *Digital News Report*. But there are differences from country to country. While generational cohort influences news media use, it does not determine it in a simple sense.

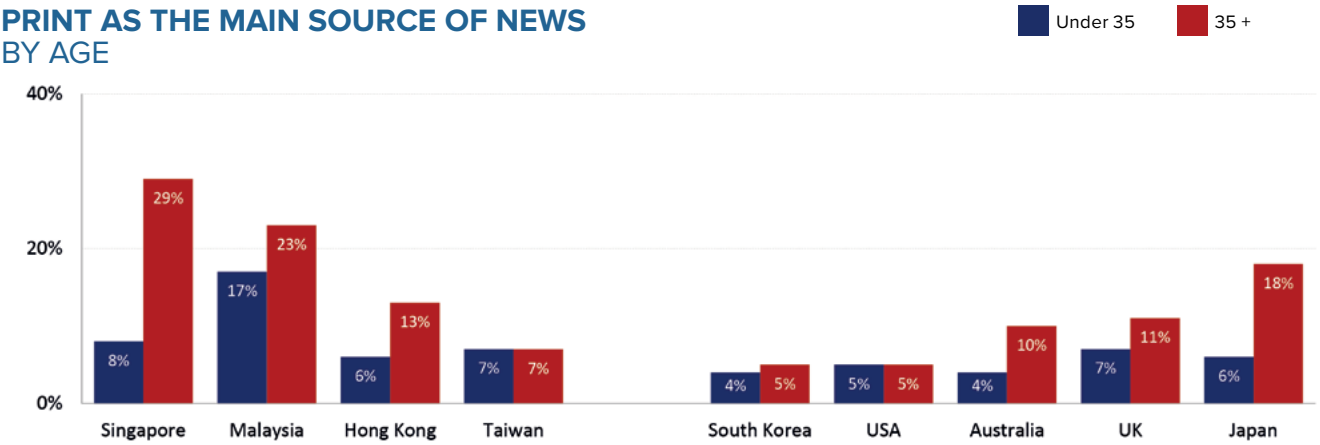
Comparing Hong Kong, Malaysia, Singapore, and Taiwan with markets elsewhere, it is worth noting that respondents over 35 there use online media, including social media, more for news than those of the same age group in Australia, Japan, the UK, and the US. Perhaps more surprisingly, a greater percentage of respondents of the younger generation (under 35) in Singapore and particularly Malaysia rely on the print media as their main news source than in the other markets included above. The level of reliance on print media as a main source of news is generally low across most markets except Singapore and Malaysia.

TELEVISION AS THE MAIN SOURCE OF NEWS BY AGE



Q4. You've used these sources of news in the past week, which would you say is your main source of news?
Base (for the under 35 age group): Hong Kong: 335; Malaysia: 452; Singapore: 332; Taiwan: 392; Australia: 552; Japan: 454; South Korea: 722; UK: 398; USA: 465.
Base (for the 35+ age group): Hong Kong: 720; Malaysia: 544; Singapore: 661; Taiwan: 608; Australia: 1397; Japan: 1448; South Korea: 1373 UK: 1562; USA: 1642.

PRINT AS THE MAIN SOURCE OF NEWS
BY AGE



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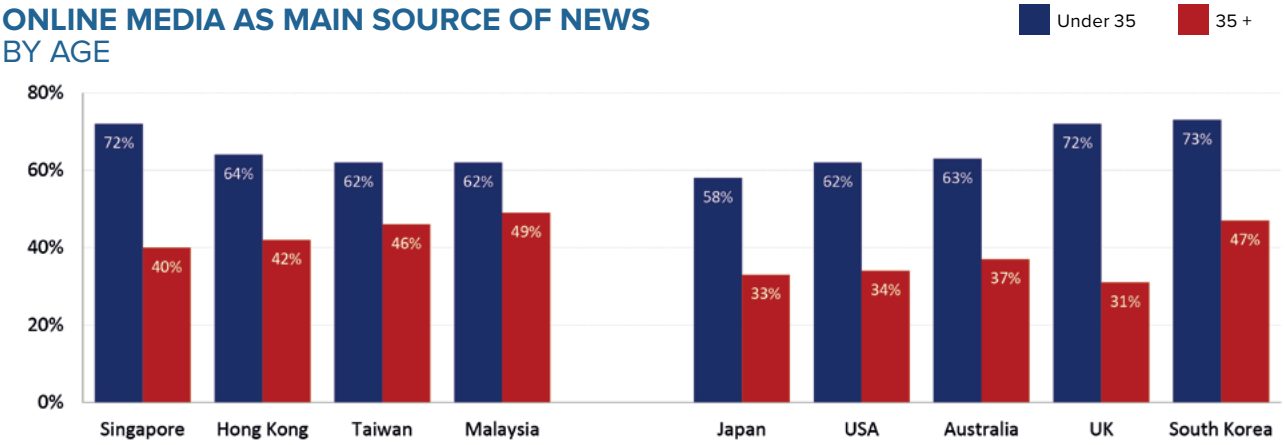
ONLINE MEDIA AS MAIN SOURCE OF NEWS
BY AGE



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BRANDS, SEARCH *AND* SOCIAL AS IMPORTANT WAYS OF FINDING NEWS ONLINE

Taking a closer look at how people come across news online, our data show how direct access to branded websites and apps, finding news via search engines, *and* coming across news on social media are all important across Hong Kong, Malaysia, Singapore, and Taiwan. In an environment that is more mobile-centred and has higher levels of social media use for news than almost any other markets, direct access via news media organisations' own websites and apps remains important ways of finding news. This is in contrast to for example Japan and South Korea where search and aggregators (including portals like Yahoo Japan and Naver) are far more important than direct access and social media, a pattern also seen in some European countries.

The use of social media as a gateway to news is particularly low in Japan and South Korea. In these two countries, the level of use of social media as a gateway to news falls below 20%. These two markets are also very different from the other Asia-Pacific markets due to the central role played by aggregators as a gateway to news. In Japan, the percentage of the surveyed online news users using an aggregator as a gateway to news is as high as 43%, while in South Korea the use of an aggregator for the same purpose is recorded at 38%. The use of aggregators as gateways to news is particularly low in the UK, the

WAYS OF COMING ACROSS NEWS BY COUNTRY

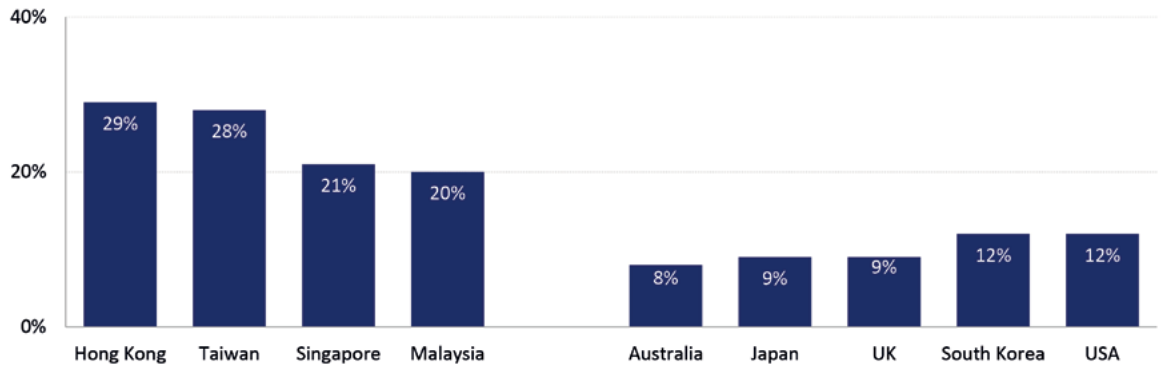
	HONG KONG	MALAYSIA	SINGAPORE	TAIWAN	AUSTRALIA	JAPAN	SOUTH KOREA	UK	USA
Directly accessed news websites/ apps	42%	45%	36%	34%	31%	12%	13%	47%	35%
Search engine- typed keyword for the name of a particular website	39%	36%	34%	45%	25%	27%	39%	15%	20%
Search engine- typed keyword about a particular news story	27%	28%	26%	37%	17%	21%	36%	10%	10%
Net search	51%	48%	46%	60%	35%	38%	60%	20%	30%
Aggregator	12%	15%	10%	12%	9%	43%	38%	6%	9%
Social media - came across news that way	38%	57%	53%	54%	36%	14%	18%	25%	35%
News via an email newsletter or email alert	14%	21%	20%	14%	16%	14%	12%	7%	20%
News alert through an app on my mobile phone/ tablet or via SMS	29%	20%	21%	28%	8%	9%	12%	9%	12%
Net direct brand entry	68%	65%	58%	64%	49%	35%	45%	57%	48%

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? Please select all that apply.
Base: Total sample in each market

USA, and Australia (below 10%), while in the four new markets, the use of aggregators as gateways to news stands between 10% and 15%.

Given that the move towards a more mobile and more social media environment is widely seen as pointing towards a future in which news media lose their direct connection with the audience, these highly technologically developed markets are particularly interesting in two ways. First, direct access to news websites and apps remains high even as search and especially social are also important. Second, other direct connections with users, like email newsletters and news alerts via apps or SMS, are far more widely used than in markets like Australia, the UK, or the US. This shows how news media organisations can develop new routes to markets even as old ones (like websites) in many cases become relatively less important.

NEWS ALERT VIA SMS OR APP AS A GATEWAY TO NEWS
BY COUNTRY



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? Please select all that apply.- Received a news alert via SMS or through an app on my mobile phone
Base: Total sample in each market.

SHARING NEWS LEADS ALL OTHER FORMS OF PARTICIPATION

The digital media environment provides more and more opportunities for sharing, commenting on, and creating content. In our survey, we ask online news users what ways they engage with and participate in the flow of news online. Across all countries covered, participation is tied to social networking sites much more than older formats like writing a blog, commenting on a news website, or sharing via email. Beyond this, the data show significant differences across countries with otherwise similarly high levels of digital, mobile, and social media use.

Sharing in its various forms is the most widely reported form of participation across all selected markets, particularly in Taiwan, Hong Kong, Malaysia, and Singapore. Taiwan has the highest number of online news users sharing news both across various options (42%) and specifically via social networking sites (34%). The numbers are high across Hong Kong, Malaysia, and Singapore too, on par with the US, higher than Australia and the UK, and considerably higher than Japan and South Korea. Given the high levels of technological development in the latter two markets, this is more likely attributable to different preferences from users than to structural differences.

Commenting in various ways is the second most widely reported form of participation across all selected markets. Again, Taiwan has the highest numbers, with 30% commenting – 26% via social networking sites. Hong Kong and Malaysia again have similarly high levels of commenting, again on par with the United States, whereas Singapore is lower and closer to South Korea and the UK.

Across all markets, sharing and commenting is far more widespread than more engaged, participatory activities like writing a blog about news or political issues or getting involved in a campaign, and participation via social networking sites is much more widespread than participation via websites and email. But the degrees to which people engage with news varies significantly across countries.

The four markets we cover here for the first time all have relatively engaged online news users, in contrast to countries like South Korea and Japan. Clearly markets across the Asia-Pacific region vary in important ways in this respect too. Japan in particular has the lowest level of participation across most ways in which the surveyed online news users engage with news. The exception here is posting or sending a news-related picture or video to a news website or organisation.

PARTICIPATION IN NEWS
BY COUNTRY

	HONG KONG	MALAYSIA	SINGAPORE	TAIWAN	AUSTRALIA	JAPAN	SOUTH KOREA	UK	USA
Write a blog on a news or political issue	6%	3%	2%	3%	3%	2%	5%	2%	3%
Take part in a campaign or group based around a news subject	6%	6%	5%	4%	7%	3%	5%	7%	5%
Comment on a news story in a social network	24%	22%	13%	26%	17%	6%	9%	14%	22%
Comment on a news story on a news website	9%	11%	8%	10%	8%	4%	8%	8%	16%
Net: Comment	29%	26%	17%	30%	21%	9%	15%	18%	29%
Share a news story via social network (e.g. Facebook, Twitter, Reddit)	28%	32%	27%	34%	21%	9%	13%	18%	25%
Share a news story via email	10%	10%	13%	13%	11%	5%	6%	8%	16%
Net: Share news	34%	38%	34%	42%	28%	13%	17%	23%	35%
Post or send a news related picture or video to a social network	12%	16%	11%	15%	8%	3%	6%	6%	11%
Post or send a news-related picture or video to a news website/ organisation	9%	7%	6%	7%	5%	3%	4%	2%	4%

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

DIFFERENT PATTERNS OF PARTICIPATION AND ONLINE NEWS

To better identify overall patterns in participation and online news, we deploy an ordered segmentation based on levels of participation. We operate with the three categories also used in the main *Digital News Report*.

Passive participators are those that have not actively participated in news coverage at all (but may respond that they have talked about news with friends and colleagues online and/or offline).

Reactive participators are those that have contributed to sharing existing news coverage via social networks or email, and/or rated, liked, or favourited a news story (or voted in an online poll via a news site or social network).

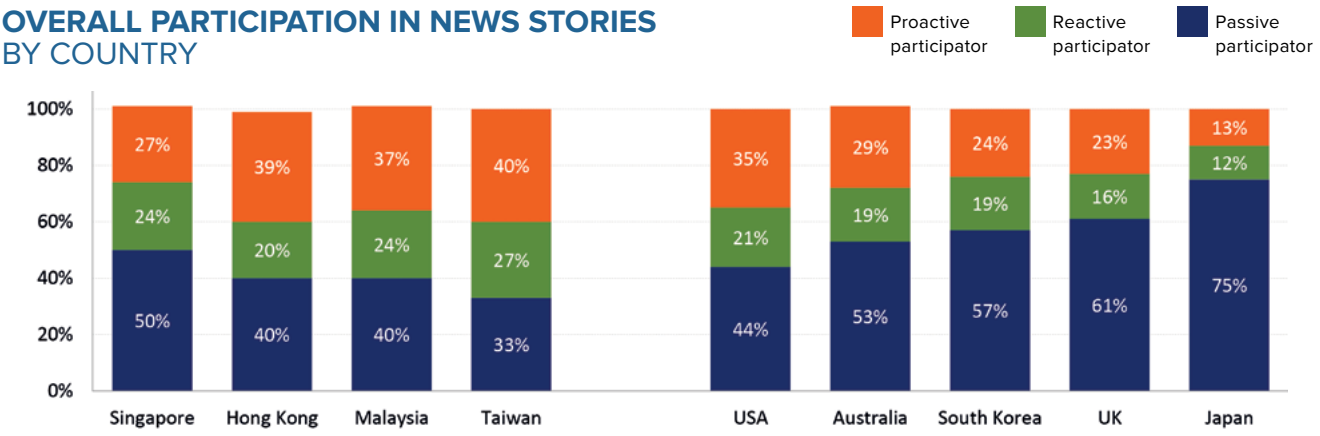
Proactive participators are those that have made an original or public contribution to news coverage by writing a blog, joining a campaign, commenting on a social network or blog, and/or posted a picture or video to a news website.

Across the 26 countries covered in the main 2016 Reuters Institute *Digital News Report*, 48% of all respondents were categorised as passive participators, and passive participators were the largest segment in 20 out of the 26 countries, including Australia, the UK, and the US as well as Japan and South Korea.

Of the four new markets, only Singapore shares this pattern. In Hong Kong and Malaysia, passive participators and proactive participators are about equally numerous, and in Taiwan, there are significantly more proactive participators than passive participators.

Especially Hong Kong, Malaysia, and Taiwan thus have very engaged and participatory online environments. The patterns seen in the new Asia-Pacific markets have far more in common with those observed in Brazil and Turkey, and in Southern Europe, than with those observed in North America, Western Europe, and in other East Asian countries like Japan and South Korea.

OVERALL PARTICIPATION IN NEWS STORIES BY COUNTRY



Segmentation C (This segmentation is based on **Question 13:** During an average week, in which (if any), of the following ways do you share or participate in news coverage? Please select all that apply.)
Base: Total sample in each market
Note: Data for each country do not add up to or exceed 100% because survey respondents are asked to select as many ways of participation as applicable.

TRUST IN NEWS, JOURNALISTS, AND NEWS ORGANISATIONS

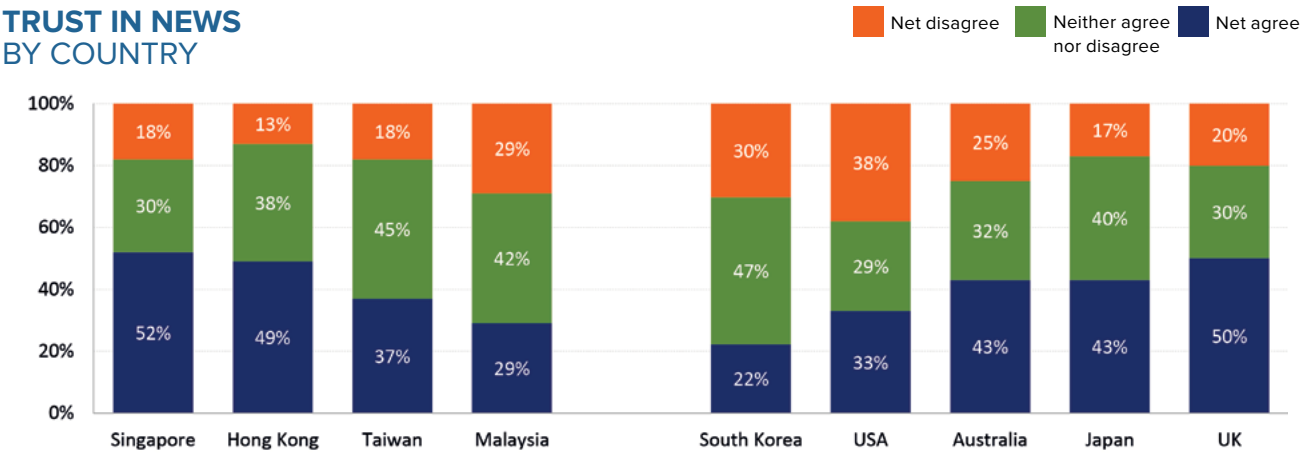
Our survey includes questions not only on how people get news and take part in the flow of news online, but also how they perceive news in terms of trust and in terms of independence from undue political and commercial influence.

The results vary by country. In Hong Kong, and especially Singapore, a high percentage of respondents say they trust news most of the time, figures comparable to those we see in the UK. The figures for Taiwan, and particularly Malaysia, are much lower, more comparable to the US and South Korea. Australia and Japan occupy a middle position. Malaysia not only has a lower percentage of people saying they trust news most of the time: it also has, again like the US and South Korea, a large number of respondents saying they do *not* trust news (29%). In most other countries, those who actively distrust news is a smaller minority.

To better understand the dynamics of trust in news, we follow up the general question with more specific questions about who or what people do or do not trust, asking about trust in journalists (the news profession) and trust in news organisations (the news institution).

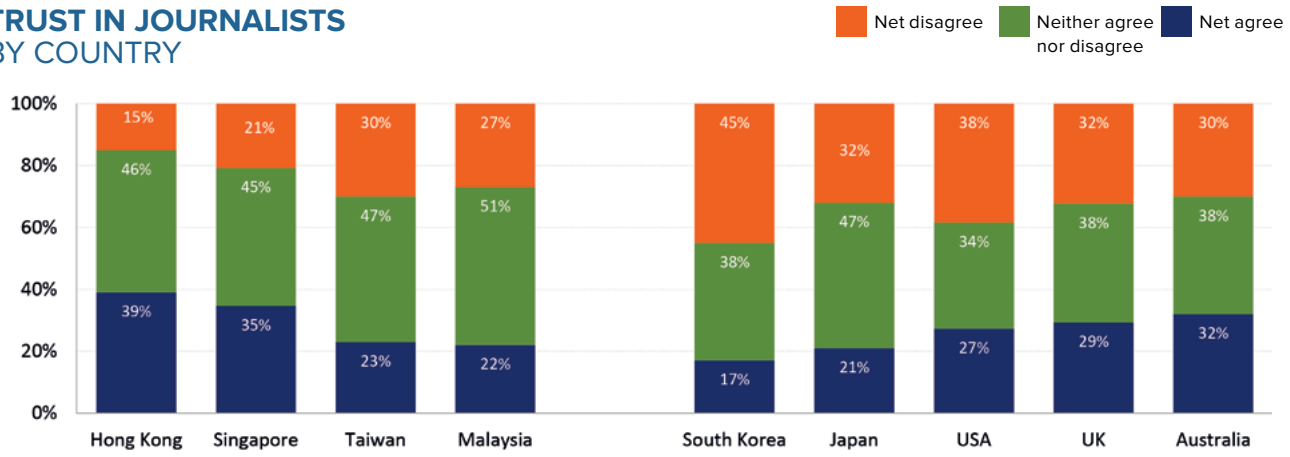
Two patterns stand out. First, trust in news generally and trust in, respectively, journalists and news organisations is closely aligned, with higher levels of trust in Hong Kong and Singapore, and lower levels of trust in Taiwan and Malaysia. Second, we see the same pattern across all four of these markets as was observed in almost every one of the 26 countries covered in the main 2016 *Digital News Report* – more people say they trust news organisations than say they trust journalists. This is an indication of how strong brands associated with editorial values can enhance the credibility of the work of individual journalists. Again, there are higher levels of distrust in Malaysia than in any other market covered in the pilot study, more akin to what is seen, for example, in South Korea.

TRUST IN NEWS
BY COUNTRY



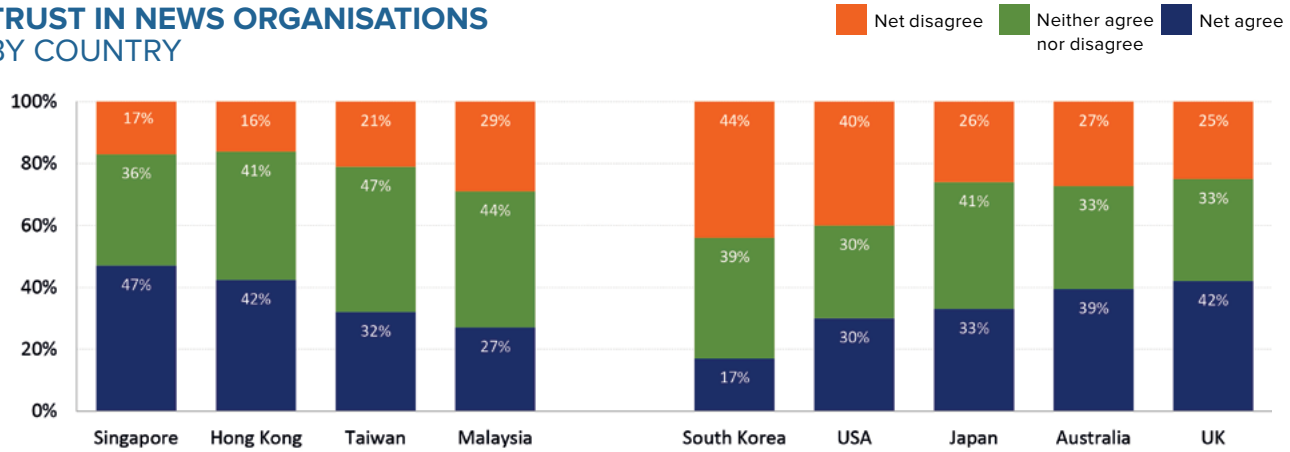
Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statement? 'I think you can trust most news most of the time.'
Base: Total sample in each market
Note 1: Net agree includes respondents who answered 'Tend to agree' and 'Strongly agree'. Net disagree includes 'Strongly disagree' and 'Tend to disagree'.
Note 2: Some of the data does not round up to 100%.

TRUST IN JOURNALISTS
BY COUNTRY



Q6_2016_2. Thinking about news in general, do you agree or disagree with the following statement? 'I think you can trust most journalists most of the time.'
Base: Total sample in each market
Note 1: Net agree includes respondents who answered 'Tend to agree' and 'Strongly agree'. Net disagree includes 'Strongly disagree' and 'Tend to disagree'.
Note 2: Some of the data does not round up to 100%.

TRUST IN NEWS ORGANISATIONS
BY COUNTRY



Q6_2016_3. Thinking about news in general, do you agree or disagree with the following statement? 'I think you can trust most news organisations most of the time.'
Base: Total sample in each market
Note 1: Net agree includes respondents who answered 'Tend to agree' and 'Strongly agree'. Net disagree includes 'Strongly disagree' and 'Tend to disagree'.
Note 2: Some of the data does not round up to 100%.

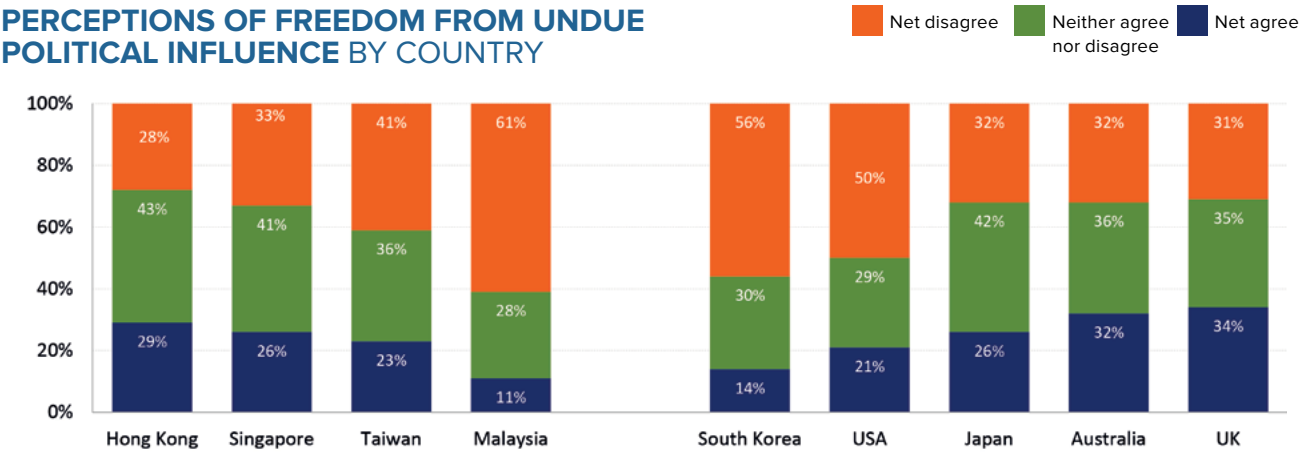
ARE NEWS MEDIA SEEN AS FREE FROM UNDUE POLITICAL AND COMMERCIAL INFLUENCE?

One issue potentially influencing people's trust in news is whether they see it as independent of undue influence. In our survey, we have questions focusing specifically on political and commercial influence.

Across all markets covered in the main report and the pilot study, significant numbers disagree with the statement that 'the news media in my country is independent from undue political or government influence most of the time' – that is, they see news media as subject to undue political influence. But there is substantial variation, from figures around 30% in many markets to figures over 50 or even 60% in cases like Malaysia, South Korea, and the US.

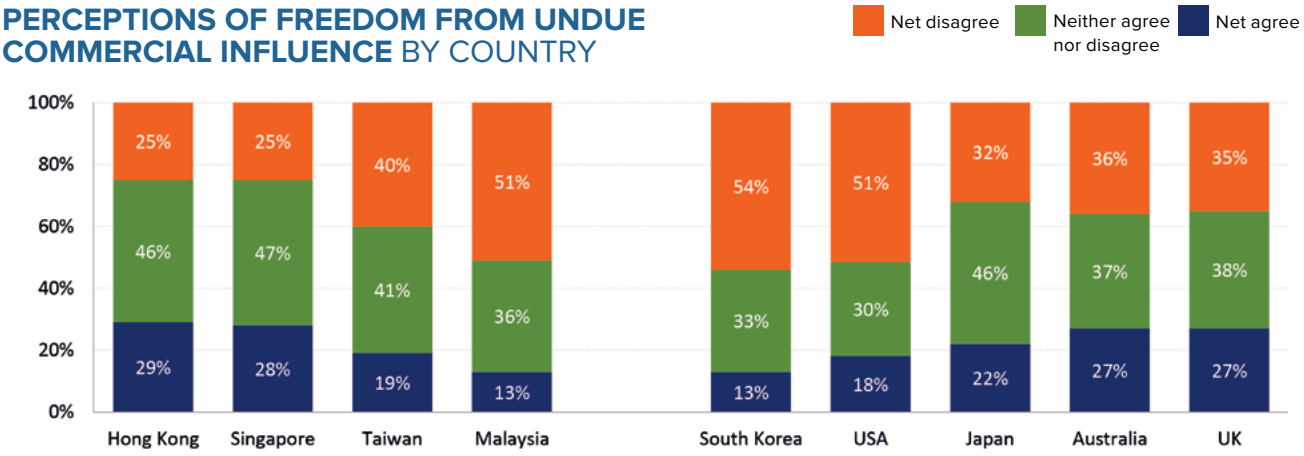
In the survey, we ask a similar question about commercial influences – 'the news media in my country is independent from undue business or commercial influence most of the time'. Again, large numbers of respondents disagree with this statement, suggesting they see news media as subject to undue commercial influence. In all four Asia-Pacific markets, the number of people who express concern over undue commercial influence is similar to the number of people who are concerned over undue political influence. (In some cases, the two forms of influence are of course tightly intertwined.) In Hong Kong, Singapore, and Malaysia, however, more people are concerned over undue political influence than undue commercial influence.

PERCEPTIONS OF FREEDOM FROM UNDUE POLITICAL INFLUENCE BY COUNTRY



Q6_2016_4. Thinking about news in general, do you agree or disagree with the following statements? 'The news media in my country is independent from undue political or government influence most of the time.'
Base: Total sample in each market
Note 1: Net agree includes respondents who answered 'Tend to agree' and 'Strongly agree'. Net disagree includes 'Strongly disagree' and 'Tend to disagree'.
Note 2: Some of the data does not round up to 100%.

PERCEPTIONS OF FREEDOM FROM UNDUE COMMERCIAL INFLUENCE BY COUNTRY



Q6_2016_5. Thinking about news in general, do you agree or disagree with the following statements? 'The news media in my country is independent from undue business or commercial influence most of the time.'
Base: Total sample in each market
Note 1: Net agree includes respondents who answered 'Tend to agree' and 'Strongly agree'. Net disagree includes 'Strongly disagree' and 'Tend to disagree'.
Note 2: Some of the data does not round up to 100%.

PRESS FREEDOM AND TRUST IN NEWS

It is interesting to note that our survey results concerning trust and people's perception of whether news media are free from undue political and commercial influence are only partially aligned with international assessments of press freedom.

In, for example, Freedom House's Press Freedom Rankings, many of the Asia-Pacific markets covered here are classified as partly free or not free. Of the Asia-Pacific markets discussed here, only the press in Australia, Japan, and Taiwan are rated free. This restriction distinguishes many markets in the region from some countries in Europe (like the UK) and North America (the US), which are ranked free. In line with the view expressed by many of our respondents, central issues identified by Freedom House concern the political environment. (Other observers like Reporters without Borders express similar concerns – rating the situation in Taiwan 'satisfactory', finding 'noticeable problems in Hong Kong', and a 'difficult situation' in Malaysia and Singapore.[5])

These kinds of ranking and scores, however, are not necessarily indicative of whether people trust news or believe news media to be free from undue influence. Take for example Singapore and Malaysia, neighbouring countries both categorised 'Not free' by Freedom House. In Singapore, 52% of our respondents say you can trust news most of the time, and a relatively small minority see news as subject to undue political (33%) and/or commercial (25%) influence. In Malaysia, in contrast, only 29% say you can trust news most of the time, and a majority see the media as subject to undue political (61%) and/or commercial (51%) influence. Or compare Hong Kong with the United States, one categorised 'Partly free', the other 'Free' by Freedom House. In Hong Kong, 49% of respondents say you can trust news most of the time, and a minority see the media as subject to undue political (28%) and/or commercial (25%) influence. In the United States, only 33% say you can trust news most of the time, and about half of all respondents see news as subject to undue political (50%) and/or commercial (51%) influence.

The differences between our data on people's perceptions of their media environments and the assessments offered by international observers like Freedom House underline the complexity of the relationship between the media and consumers of news as well as the legal, political, and economic environment in each selected market. Further research is required to establish the causal relationship between online news users' perceptions of their media and the media environment in each market as assessed by Freedom House and the like.

2016 PRESS FREEDOM SCORES BY COUNTRY

	HONG KONG	MALAYSIA	SINGAPORE	TAIWAN	AUSTRALIA	JAPAN	SOUTH KOREA	UK	USA
Press freedom status	Partly free	Not free	Not Free	Free	Free	Free	Partly free	Free	Free
Press freedom score (0 = best/ 100 = worst)	39	67	67	28	23	26	33	25	21
Legal environment (0 = best/ 30 = worst)	13	26	24	9	6	5	10	9	6
Political environment (0 = best/ 40 = worst)	17	24	22	9	10	15	14	9	10
Economic environment (0 = best/30 = worst)	9	17	21	8	7	6	9	7	5

Source: Press Freedom House (https://freedomhouse.org/report/freedom-press-2016/table-country-scores-fotp-2016)

[5] See their 2016 Press Freedom Index, https://rsf.org/en/ranking_table

CONCLUSION

The results from our pilot survey and analysis show that the four Asia-Pacific markets in focus, Hong Kong, Malaysia, Singapore, and Taiwan, generally are (1) mobile-oriented markets, (2) with a very wide use of social media for news, but that (3) news media organisations with strong brands and developed strategies using channels like newsletters and mobile alerts still retain a strong connection with a large number of users.

The third point is perhaps particularly important. Especially Hong Kong, Singapore, and Taiwan are more highly technologically developed media markets than most other countries around the world, with high reliance on digital media, high levels of smartphone use, and wide use of social media. In some ways, they represent possible versions of what a more digital, mobile-first, social-first media environment might look like. If so, the results from this pilot study are encouraging for news media organisations, because our data suggest that the growing importance of search engines and especially social media in terms of how people access and find news does not need to be a zero sum-game that leads to the marginalisation of news media. If their journalism is compelling, and their websites, apps, and other direct channels like newsletters and mobile alerts are good enough, they can still build a significant audience and maintain their position as the main source of news for many people.

Comparison with other Asia-Pacific markets covered in the main Reuters Institute *Digital News Report*, like Australia, Japan, and South Korea conclusively shows that the there is significant variation within the region in terms of the centrality of online news, in terms of how people access and find news online, and in terms of the degree to which they engage with and participate in online news. Japan and South Korea are big important markets in their own right, but not representative of trends elsewhere.

While there are patterns that recur across the markets covered here and the 26 countries covered in the main *Digital News Report* – most importantly generational differences in terms of the relative importance of mobile media, social media, and online media versus television – there are also significant differences between markets and each needs to be analysed and understood on its own terms.

Our survey included a range of questions concerning trust in the news and perceptions of whether news is subject to undue political and commercial influences. The results vary from market to market, and in ways that bear no simple relationship with freedom of the press. The media in both Malaysia and Singapore are categorised as 'Not free' by Freedom House, but people in Malaysia are far more sceptical of their media than people in Singapore. Similarly, while Hong Kong is categorised as 'Partly free' and the United States 'Free', many more people in the US distrust news and see news media as subject to undue political and commercial influence.

MARKET PROFILES

HONG KONG

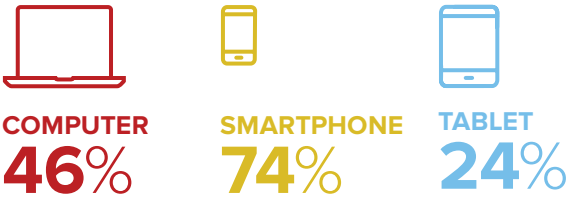
STATISTICS

Population: **7.1m**

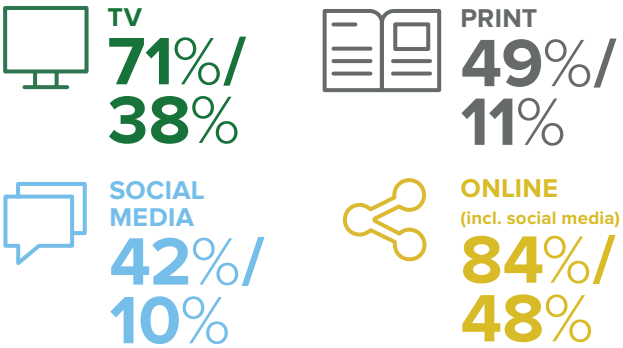
Internet penetration: **81%**

Hong Kong has relatively high levels of internet use. Among internet users, smartphones are heavily relied on for online news consumption. Direct access to news through news websites or applications or search engines is more common than access to news via social media. Television, generally, remains the most widely accessible media. More online news users rely on television as their main source of news than they do newspapers and radio. The media here are rated as 'Partly free' by outside observers.

AMONGST ONLINE NEWS USERS
WEEKLY USE FOR NEWS



MAIN REACH FOR NEWS/ MAIN SOURCE OF NEWS



Internet access in Hong Kong, at 81%, is lower than the access to domestic licensed free television (99%) and domestic pay television (94%) services, according to the Office of the Communications Authority.[6] A report by the Broadband Commission for Digital Development (2015) suggests that mobile broadband is more widely used than fixed broadband. Mobile phone penetration rate is high and so is the proportion of household access to personal computers.[7]

The Hong Kong media market features concentrations across all media platforms. The TV market is dominated by one free-to-air broadcaster, TVB, and a handful of pay-TV operators. Hong Kong used to have two free-to-air broadcasters, ATV and TVB. The government-run public broadcasting service Radio Television Hong Kong (RTHK) took over the analogue frequencies from ATV in April 2016 when the ATV licence expired.[8] Since then, the government has approved free-to-air TV licences for Hong Kong Television Entertainment Company Limited (HKTVE), owned by Hong Kong's top pay-TV operator, the Pacific Century CyberWorks or PCCW Limited[9] and to Fantastic Television Limited (Fantastic TV).[10] Despite new players in the market, some local scholars remain sceptical that the newcomers will be able to challenge TVB's domination.[11]

A similar situation applies to Hong Kong's domestic pay-TV market. Hong Kong's Office of the Communications Authority reveals three domestic pay-TV programme service licensees in June 2016: PCCW Media Limited (also known as Now TV), Hong Kong Cable Television Limited, and TVB Network Vision Limited.[12] PCCW Media Limited or Now TV dominates the IPTV platform, providing 223 television channels.[13] The operator also carries 62 channels operated by TVB Network Vision Limited, which is a pay-TV service offered by TVB. Hong Kong Cable Television Limited dominates the cable TV platform, providing 109 channels.

6 http://ofca.gov.hk/en/media_focus/data_statistics/key_stat/index.html
7 http://www.censtatd.gov.hk/hkstat/sub/so120.jsp
8 http://www.chinadaily.com.cn/hkedition/2015-04/03/content_19988835.htm
9 http://www.thestandard.com.hk/section-news.php?id=166756
10 http://www.info.gov.hk/gia/general/201605/31/P201605310562.htm
11 See Cheung 2015.
12 http://www.ofca.gov.hk/filemanager/ofca/en/content_108/channel_list_eng.pdf
13 http://www.ofca.gov.hk/filemanager/ofca/en/content_108/channel_list_eng.pdf

The satellite platform features a greater number of service providers than that seen on other delivery platforms. These licensees offer a mix of imported and locally produced content.

The radio broadcasting market here also shows signs of concentration. The record of the Office of the Communications Authority identifies four sound broadcasting licensees in Hong Kong.[14] Of these licensees, three are commercial broadcasters: Hong Kong Commercial Broadcasting Company Limited, Metro Broadcasting Corporation Limited, and Digital Broadcasting Corporation Hong Kong Limited (DBC). Hong Kong Commercial Broadcasting Company Limited operates three radio channels while Metro Broadcasting Corporation Limited and Digital Broadcasting Corporation Hong Kong Limited operate six and seven radio channels, respectively. However, DBC, a large commercial digital broadcaster has announced it is closing as of September 2016.[15] DBC's closure is the second digital radio station announcing its closure, following the closure of URadio under the Chinese channel Phoenix TV in September last year.[16] Hong Kong has one public service radio broadcaster, Radio Television Hong Kong (RTHK), which operates 12 radio channels.[17]

Hong Kong's newspaper market features many competing titles. These titles are owned by a handful of major business corporations, most of which have direct or indirect affiliation or business interests in Mainland China. The Sing Tao News Corporation, a Hong Kong-based media corporation with networks in Mainland China, North America, Europe, and Australia, owns two of the top daily newspapers, *Headline Daily* and *Sing Tao Daily*.[18] The Oriental Press group owns one of the top dailies in Hong Kong, *Oriental Daily*, other major news websites, and other services.[19] The group's business profile indicates its interest in attracting readers from Mainland China. Centaline Holdings, essentially a property company servicing the Mainland China, Hong Kong and Macau markets,[20] founded one of the top free newspapers in this market, *AM730*. Next Media, which publishes *Apple Daily* in Hong Kong and Taiwan as well as online news sites, is pro the democratic movement, following the political stand of its founder, Jimmy Lai.[21]

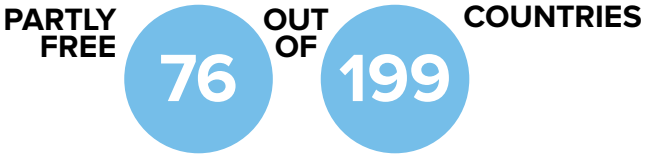
Other top newspaper titles have either merged with other businesses or been taken over by larger companies that raised concerns over the papers' editorial independence and political standpoints. Ming Pao Enterprise Corporation Ltd, which published *Ming Pao Daily*, merged with Sin Chew Media Corporation Berhad, and Nanang Press Holdings Berhad, giving rise to Media Chinese International Ltd in April 2008.[22] The appointment of Chong Tien Siong as *Ming Pao Daily's* Chief Editor in 2014, after the merger, raised concerns over the paper's editorial independence due to the Siong's close ties with Mainland China.[23] The acquisition of Hong Kong's high-profile English-language newspaper, *South China Morning Post*, by China's e-commerce giant, Alibaba Group in 2015, has raised similar concerns.[24]

[14] http://www.ofca.gov.hk/filemanager/ofca/en/content_108/channel_list_eng.pdf
[15] https://www.hongkongfp.com/2016/08/08/dbc-station-close-marking-second-closure-digital-radio-station-year/
[16] https://www.hongkongfp.com/2016/08/08/dbc-station-close-marking-second-closure-digital-radio-station-year/
[17] See Cheung 2015.
[18] http://www.singtaonewscorp.com/english/corporate_info_background.html
[19] http://opg.on.cc/en/introduction.html
[20] http://www.centaline-oir.com/Default.aspx
[21] http://www.referenceforbusiness.com/history2/91/Next-Media-Ltd.html
[22] http://www.mediachinesegroup.com/htm/content.cfm?channel=corp&path=corp_03&lang=E
[23] https://www.hongkongfp.com/2016/04/20/ming-pao-newspaper-union-extremely-angered-by-sudden-firing-of-executive-chief-editor
[24] http://www.scmp.com/news/china/society/article/1937256/alibabas-jack-ma-reveals-why-he-bought-south-china-morning-post

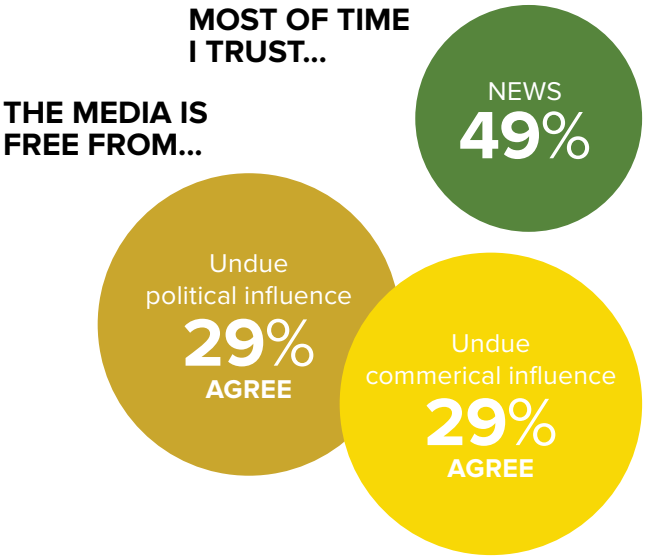
Many of these newspapers have a prominent online presence. Five of these papers' online counterparts, Next Media.com, On.cc, stheadline.com, Mingpao.com, and scmp.com, top Alexa's website traffic ranking for news. Two born-digital news websites, bastillepost.com and thestandnews.com, make it to Alexa's top five website traffic ranking. Hk01.com, another born-digital news website, is also gaining in popularity. According to Alexa's measures, other born-digital news websites such as Hong Kong Free Press, FactWire and Initium Media attract much less traffic.

The media in Hong Kong are classified by Freedom House as 'Partly free'. The key concerns for press freedom in this country include worrying degrees of self-censorship due to political and economic pressure, although the former is more visible than the latter.[25] The organisation observes that freedom of speech, press and publication stipulated in Article 27 of the Basic Law are at risk of being undermined by the political power of the Mainland China, Chinese surveillance in Hong Kong, and the media moguls' economic interests in Mainland China. Reporters without Borders see the situation as characterised by 'noticeable problems'.[26]

FREEDOM OF THE PRESS RANKING
(FREEDOM HOUSE)



AMONGST ONLINE NEWS USERS



[25] https://freedomhouse.org/report/freedom-press/2016/hong-kong

[26] https://rsf.org/en/ranking_table

MALAYSIA

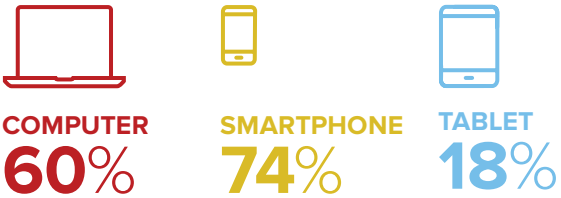
STATISTICS

Population: **30.5m**

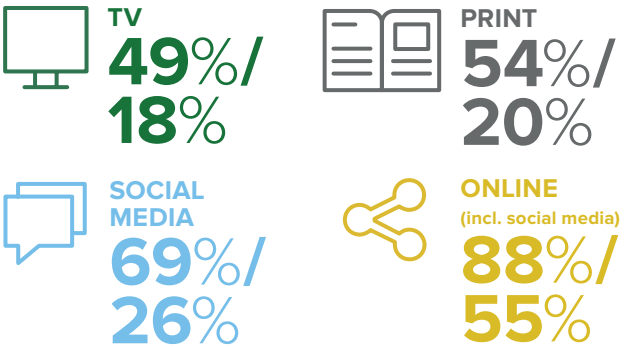
Internet penetration: **68%**

Malaysia has a lower level of internet penetration than more affluent parts of the Asia-Pacific region. Amongst those who do have internet access, online news, particularly found through social media, is widely used. More internet users here rely on printed newspapers for news than rely on television. More broadly, television remains the most widely accessible electronic media while the disparity between rural and urban broadband penetration persists. The media in Malaysia are categorised as 'Not free' by outside observers.

AMONGST ONLINE NEWS USERS
WEEKLY USE FOR NEWS



MAIN REACH FOR NEWS/ MAIN SOURCE OF NEWS



Internet access is, at 68%, less widespread than television (98%) and radio (86%). ITU data suggest fixed broadband subscriptions are still rare (10%) whereas mobile broadband is more widely available (58%).[27] Mobile phone penetration is high (though not all are smartphones or phones enabling web access), and more than half the population has access to a personal computer.[28]

The Malaysian media market features cross-media ownership and an oligopoly of players, many of whom are either directly or indirectly associated with the government and the UMNO (United Malays National Organisation) party, the dominant force in the governing Barisan National coalition. Two players dominate terrestrial TV broadcasting: Radio Televisyen Malaysia (RTM) and Media Prima Group. RTM is a state-run radio and television broadcaster. Media Prima Group is private and owns four terrestrial entertainment channels: TV3, NTV7, 8TV, and TV9. In a recent Open Society Foundation report, it was seen as closely tied to the ruling UMNO party.[29] The Media Prima Group also owns three mainstream newspapers: *New Straits Times*, *Harian Metro*, and *Berita Harian*. The other dominant player in the Malaysian TV market is Astro Malaysia Holdings.

The majority of the company's shares are owned by Ananda Krishnan, who is reported to have close ties with the former Prime Minister, Dr Mahathir Mohammed.[30] Another significant amount of the company's shares are owned by the government's investment fund known as Khazanah Nasional. Astro is Malaysia's sole digital satellite provider, offering both television and radio services and covering local news, sports, and entertainment programmes.

Radio broadcasting is again dominated by a handful of players with connections to the ruling coalition party, Barisan Nasional (BN), which has succeeded and combined UMNO, MCA (Malaysian Chinese Association), and MIC (Malaysian Indian Congress). Such players include Astro Malaysia Holdings, the MCA, and the Malaysian National News Agency (Bernama). Astro Malaysia Holdings operates AMP Radio networks. MCA operates Star RFM and also owns a national tabloid newspaper, *The Star.* The Malaysian National News Agency runs Bernama Radio 24. Many of these radio channel broadcasts are a mix of entertainment and news programmes. Only two are purely news channels: Business FM and Bernama Radio 24.

[27] See the ITU and UNESCO 2015.

[28] See data from Malaysian Communications and Multimedia Commission 2015.

[29] https://www.opensocietyfoundations.org/sites/default/files/mapping-digital-media-malaysia-20130617.pdf

[30] http://www.thestar.com.my/business/business-news/2015/01/08/new-shareholders-emerge-in-astro-malaysia-holdings

Similar to the broadcast landscape, the ownership of print media in Malaysia is concentrated, with the main players being Media Prima Group (see above), the Utusan Melayu Group, and Media Chinese International. The Utusan Melayu Group publishes *Utusan Malaysia*, a mainstream broadsheet newspaper and *Kosmo!* A significant number of its shares (49.77%) is reportedly held by UMNO, through an RHB nominee (Tempatan) Sdn Bhd, which is a subsidiary of Rashid Hussain Bhd.[31] Media Chinese International publishes one of the mainstream newspapers, *Sin Chew Daily*, as well as other titles such as *Nanyang Siang Pau*, *China Press*, and *Guang Ming Daily*. Of these newspapers, tabloids are generally more popular than broadsheets, with the exception of *Sin Chew Daily,* which is a Chinese-language newspaper. Another widely read title is the free tabloid paper *The Sun. New Straits Times* is the most important English-language upmarket title.

In terms of news websites, many of them are associated with legacy brands coming out of television, radio, and print. Alexa rankings for news suggest that some of the most widely used ones are newspaper websites, especially *The Star*, but some also turn to online-only players. The most important is Malaysiakini. The site was launched in 1999 with a capital injection from its founders, donations from friends and a US$100,000 grant from Southeast Asian Press Alliance (SEAPA). The news website maintains its operations mainly with a combination of subscriptions and advertising. The website's additional income derives from funding agencies such as the Asia Foundation, the Canadian International Development Agency (CIDA), Free Voice, and the International Centre for Journalists among others. For this reason, Malaysiakini claims to be independent of government control through ownership.[32] Over 60% of its shares are held by its co-founders, Steven Gan (Editor-in-Chief) and Premesh Chandran (CEO). In addition to Malaysiakini, many other digital news websites have emerged. These include, for example, The Malaysian Insider (Themalaysianinsider.com), Free Malaysia Today (Freemalaysiatoday.com), Malaysia Chronicle (Malaysia-chronicle.com), Malaysian Mirror (Malaysianmirror.com), and The Nut Graph (Thenutgraph.com). However, very few of these websites thrive in a politically and commercially challenging environment.[33]

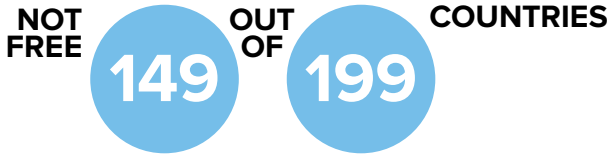
[31] http://www.theedgemarkets.com/my/article/utusan-melayu-continues-losing-streak-1q-net-loss-rm1997m?type=Markets

[32] http://about.malaysiakini.com/accountability

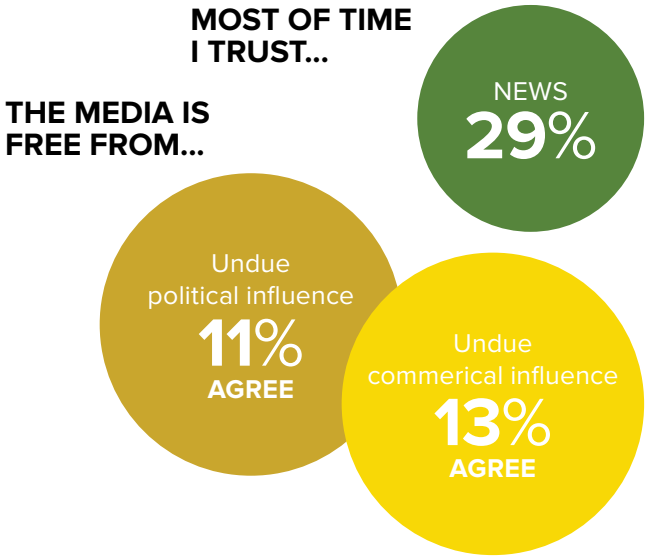
[33] https://www.opensocietyfoundations.org/sites/default/files/mapping-digital-media-malaysia-20130617.pdf

The Malaysian media environment is categorised as 'Not free' by Freedom House and other international observers like Reporters without Borders express similar concerns. Reporters without Borders call the situation 'difficult'.[34] The main issues include the legal environment, political pressures from the ruling party and government, and commercial pressures in part tied to political players. The 1948 Sedition Act, which criminalises any act with 'seditious tendency' that might 'excite disaffection' or 'bring into hatred or contempt' the rule of government, has been used against media reporting on corruption stories.[35] As has Section 233(1)(a) of the Communications and Multimedia Act 1998, which 'criminalises the use of network facilities or network services by a person to transmit any communication that is deemed to be offensive and could cause annoyance to another person'.[36] A minority of respondents in Malaysia say you can trust news most of the time and even fewer see news as free from undue political and commercial influence.

FREEDOM OF THE PRESS RANKING
(FREEDOM HOUSE)



AMONGST ONLINE NEWS USERS



[34] https://rsf.org/en/ranking_table

[35] https://freedomhouse.org/report/freedom-press/2015/malaysia

[36] According to Steven Thiru, the president of the Malaysian Bar, this piece of legislation has been used in ways that restrict freedom of expression and of the press. http://www.malaysianbar.org.my/press_statements/press_release_l_section_2331a_of_the_communications_and_multimedia_act_1998_creates_a_chilling_effect_on_freedom_of_speech_and_expression_and_should_be_repealed.html

SINGAPORE

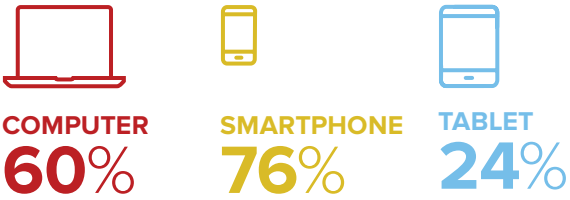
STATISTICS

Population: **5.7m**

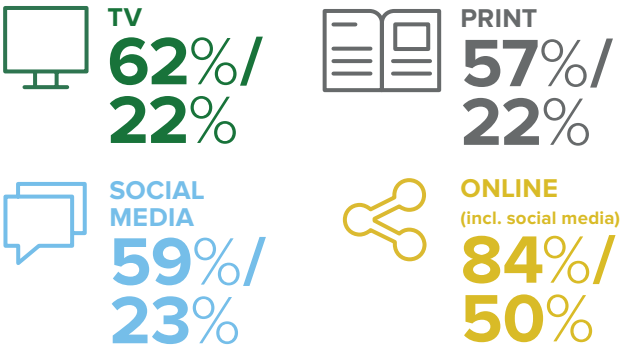
Internet penetration: **82%**

Singapore is a highly developed digital media market. Generally, people in Singapore now spend more time online than they do watching television. Around eight out of ten of these internet users use the online media, particularly social media, as a source of news. Many of them also comment on and share news via social media. The media here are categorised by outside observers as 'Not free'.

AMONGST ONLINE NEWS USERS
WEEKLY USE FOR NEWS



MAIN REACH FOR NEWS/ MAIN SOURCE OF NEWS



Singapore has a highly developed digital infrastructure. Data from the Broadband Commission[37] and the Infocomm Development Authority of Singapore (IDA)[38] show high levels of mobile broadband subscribers and mobile phone users more broadly. Access to the internet is 82%; 68% of the population have access to two or more computers at home.[39]

According to the *World Press Trends Database* (World Association 2015), the amount of time people in Singapore spend on television and newspapers has been in decline since 2010, while the amount of time they spend on the internet has consistently increased. In 2014, media users spent on average 117 minutes watching television and 39 minutes reading print newspapers per day, and 175 minutes online.

Despite the availability of over 500 foreign newspapers and international cable and satellite broadcasters, Singapore features a concentrated media market in most sectors; in some cases, according to an Open Society Foundation report, a monopoly.[40] The Foundation's report indicates that the ownership structure of local legacy media organisations subjects these organisations to the influence of state agencies.

Singapore's television service market features a monopoly on all delivery platforms. All the eight local free-to-air television channels are operated by the state-owned broadcaster, MediaCorp.[41] As for the paid television services, there are only two operators, each dominates one delivery platform. These include StarHub TV and SingTel IPTV (mio TV). The former is the sole provider of paid cable TV service; the latter provides television via internet protocol. Paid satellite-delivered television service is not available because private ownership of satellite dishes is prohibited.

[37] http://www.broadbandcommission.org/documents/reports/bb-annualreport2015.pdf
[38] https://www.ida.gov.sg/Tech-Scene-News/Facts-and-Figures/Telecommunications
[39] https://www.ida.gov.sg/Tech-Scene-News/Facts-and-Figures/Infocomm-Usage-Households-and-Individuals
[40] https://www.opensocietyfoundations.org/sites/default/files/mapping-digital-media-singapore-20131017_0.pdf
[41] https://www.opensocietyfoundations.org/sites/default/files/mapping-digital-media-singapore-20131017_0.pdf

The local radio market here is dominated by MediaCorp, which operates 13 FM stations.[42] Of these, only two (938LIVE and Capital 98.5FM) offer news and information; the rest either provide entertainment or serve the interests of minority communities. The other two radio service operators are the Singapore Armed Forces Reservists Association (AFRA) radio and SPH Radio. The former is defence-linked and operates two radio stations, Power 98FM and 883JiaFM. The latter operates three stations, ONE FM 91.3, UFM 100.3, and KISS 92FM.

The local print media are dominated by Singapore Press Holdings (SPH), which operates three radio stations as well as online news websites. The company owns most of the top local newspaper titles, both free and paid. These include the *Straits Times*, *My Paper*, *Lianhe Zaobao*, *Shin Min Daily News*, *Lianhe Wanbao*, and *Tamil Murasu*. The only other local company that publishes a local newspaper is MediaCorp Press. The company prints *Today*, the most popular free tabloid newspaper based on its circulation and readership.[43]

Cross-media ownership is also common. Examples include the cases of MediaCorp's *Today* newspaper and SPH's television operations. These ventures into the other's monopolistic turf resulted from the government's attempt to liberalise the media, issuing broadcast licences for SPH and a newspaper license for MediaCorp in 2000.[44] However, these ventures did not succeed commercially and the incumbent players have reasserted their dominance through the mergers of SPH's TV operations with MediaCorp and MediaCorp's newspaper with that of SPH.[45]

Online news is also dominated by incumbent legacy media, although alternative media in forms of current affairs news websites and various blogs have emerged. The top news websites, according to Alexa and the *World Press Trends Database* (World Association 2015), are either operated as an online version of the offline products of the local legacy media brands or as their born-digital version. These include Todayonline.com, Zaobao.com, Businesstimes.com.sg, Tnp.sg, Omy.sg, and Straitstimes.sb. Of these online news websites, only Todayonline.com is operated by MediaCorp; the rest are operated by SPH. Of these websites, Omy.sg, operated by SPH, is a born-digital news website that was launched in 2007.

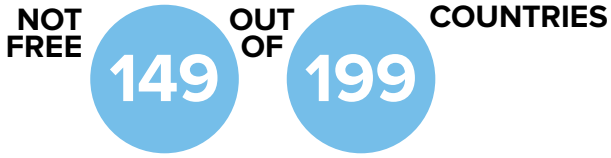
Alternative news sources in the form of new blogs and websites have grown, especially since the 2006 elections, according to the Open Society Foundation report.[46] Alexa's traffic metrics suggests that a number of these sites have received more traffic than some of the news websites operated by the legacy media in the past six months. Examples of these alternative news sources include mothership.sg,[47] the independent.sg,[48] and the onlinecitizen.com.[49] Despite the success of these alternative news sources, some have closed down due to political pressure.[50]

[42] https://www.opensocietyfoundations.org/sites/default/files/mapping-digital-media-singapore-20131017_0.pdf
[43] World Association 2015.
[44] http://www.wsj.com/articles/SB960194789940765619
[45] http://www.sph.com.sg/media_releases/150
[46] https://www.opensocietyfoundations.org/sites/default/files/mapping-digital-media-singapore-20131017_0.pdf
[47] http://mothership.sg/about-us
[48] http://theindependent.sg/about-us
[49] https://www.opensocietyfoundations.org/sites/default/files/mapping-digital-media-singapore-20131017_0.pdf
[50] http://www.todayonline.com/singapore/mda-suspends-licence-socio-political-website-real-singapore

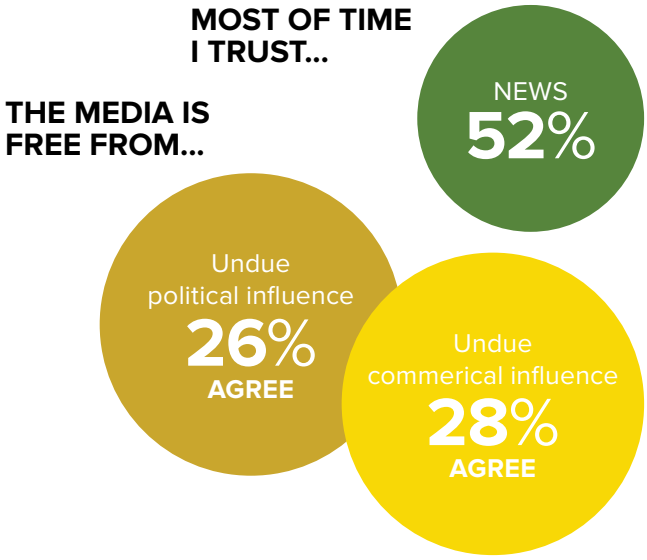
According to Freedom House,[51] the Singaporean government is tightening its control over these critical online voices. Recent examples include the eight-month jail sentence for the co-founder of the socio-political website, therealsingapore.com, for sedition in June 2016,[52] and the $150,000 defamation damages that Singapore's famous blogger, Roy Ngergn Yi Ling, was ordered to pay Prime Minister Lee in 2015. These cases indicate that the government appears to be particularly sensitive to criticisms of the Lee Kwan Yew family and posts that draw attention to, or create, racial tensions. The new regulations prescribing annual licensing for all media outlets and internet service providers were also applied in 2013 and a website that did not comply, breakfastnetwork.sg, was closed down.[53]

Given these incidents and the ownership structure of the media in Singapore, the media environment is categorised as 'Not free' by Freedom House. The core concerns include the ownership structure that allows for political control over media content and the applications of the Printing Press Act, Defamation Act, Internal Security Act, and Sedition Act to restrict and suppress criticism of the government. Reporters without Borders find the situation in Singapore 'difficult'.[54]

FREEDOM OF THE PRESS RANKING
(FREEDOM HOUSE)



AMONGST ONLINE NEWS USERS



[51] https://freedomhouse.org/report/freedom-press/2015/singapore
[52] http://www.straitstimes.com/singapore/courts-crime/trs-co-founder-yang-kaiheng-jailed-8-months-for-sedition
[53] https://sg.news.yahoo.com/mda-says-breakfast-network-cannot-operate-on-facebook--twitter-174257425.html
[54] https://rsf.org/en/ranking_table

TAIWAN

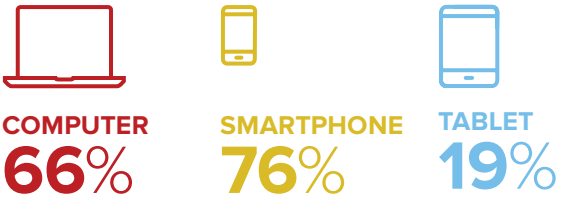
STATISTICS

Population: **23.4m**

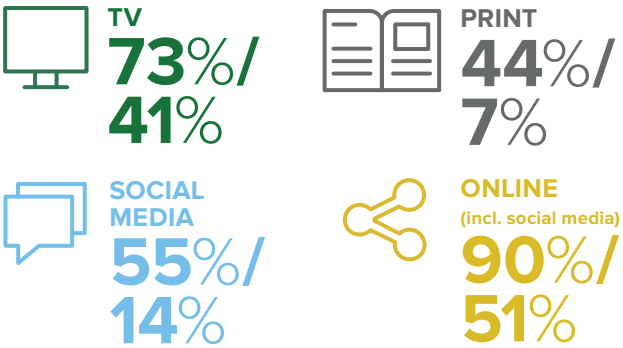
Internet penetration: **84%**

Taiwan has high levels of internet access and smartphone use. Those who have access to the internet rely heavily on online news. The most widespread gateways to news online are social media and search engines. Apart from online news, these internet users rely more on television than print for news. Taiwan has a high level of cable TV penetration and partisan newspapers. It is the only media market among the pilot study markets where the media is categorised by outside observers as 'free'.

AMONGST ONLINE NEWS USERS
WEEKLY USE FOR NEWS



MAIN REACH FOR NEWS/ MAIN SOURCE OF NEWS



The data from the National Communication Commission (NCC) suggest that internet access in Taiwan is served more by wireless and mobile broadband providers than fixed broadband providers. The Commission's latest record[55] (May 2016) suggests a quarter of all households have fixed broadband, with mobile broadband much more widely available. Generally, internet access (84%) is more widespread than cable TV.

Overall, television remains the most popular platform for news in Taiwan, with a penetration rate standing at 88% despite a decline in viewership since 2000.[56] The Taiwanese terrestrial TV broadcasting market is concentrated (Noam 2016) and is politically polarised.[57] It features four commercial stations (TTV, CTV, CTS, and FTV) and one public service broadcaster. The cable TV market is moderately concentrated (Noam 2016). The top four operators, Kbro, CNS, TBS, and TFN, commanded nearly 70% of the market in 2012.[58] Similarly, the satellite platform is also considered moderately concentrated (Noam 2016). It features major operators such as TVBS, ERA, Star TV, SET, VL, and ET. Each of these operators appears to have their own niche. For example, ET and VL focus on overseas movie imports, VL emphasises sports programmes, while SET and GTV produce dramas and export them to China and other Asian countries.[59]

The radio market here is considered unconcentrated.[60] The top three radio broadcasters are the Broadcasting Corporation of China (BCC), which had just over 20% of the market in 2012, UFO, and the Voice of Taipei. The market shares of UFO and the Voice of Taipei were only small fractions of that of the BCC.

[55] http://www.ncc.gov.tw/english/files/16030/274_1773_160712_1.pdf
[56] http://topics.amcham.com.tw/2016/03/taiwans-changing-media-landscape
[57] See Rawnsley et al. 2016.
[58] See Table 28-8. Market share and concentration in the cable TV industry, 2001–2012, in Noam 2016.
[59] See Noam 2016.
[60] Table 28-17. Market share, revenue, and the degree of concentration of daily newspapers, in Noam 2016.

The Taiwanese newspaper market, on the other hand, is classified as highly concentrated according to one comparative, international analysis.[61] The top established newspapers include *Apple Daily*, *China Times*, *United Daily News*, and *Liberty Times*. Most of these top newspapers are politically polarised. Such polarisation appears to be associated with the ownership and history of the newspapers. The most widely read paper in Taiwan, *Liberty Times*, is owned by the Lin family and is said to be pro-independence.[62] *China Times* and *United Daily News* are known to be slanted towards the Pan-Blue Coalition or pro-unification with China, particularly in terms of economic linkages.[63] Historically, both papers had warm relationships with the governing Kuomintang (KMT) party during the period of martial law (1949–87).[64] The political stand and ideology of the party continues to shape both papers' political standpoints and editorial decisions. However, *China Times* has reportedly succumbed to a top-down interference with editorial line, skewing its reports towards support for a particular Chinese state corporatism.[65] *Apple Daily*, unlike the aforementioned papers, focuses more on reporting scandals, crimes, and pop-culture rather than political news. The paper is printed in Taiwan but owned by a Hong Kong-based media company, Next Media.

Taiwan's online media has been gaining in popularity along with the expansion of internet use but has not made the traditional newspapers redundant. The major printed newspapers have led the transition from print to digital multimedia by offering online videos and live broadcasts, improving their web portals and exploring mobile platforms.[66] However, Alexa's traffic metrics indicates that Now News, a born-digital news site, which began operating in 2008,[67] now leads other online news sites operating in Taiwan. Following in second and third places are online versions of the most popular tabloid newspaper, *Apple Daily*, and a mainstream broadsheet newspaper, *China Times*. A close fourth in rank is another born-digital news website, Storm Media, which only registered for operation in 2013.[68] In the fifth rank is The News Lens, yet another born-digital news website, leaving the other online versions of the two mainstream newspapers, *United Daily News* and *Liberty Times*, quite far behind.

Taiwanese usage of online media, including social media, for news involves proactive participation, particularly through social media networks. Social media have been used as a tool for activists to bypass what is perceived to be the 'partisan filter' of the traditional media and to break stories, which will then

[61] Ibid.

[62] http://topics.amcham.com.tw/2016/03/taiwans-changing-media-landscape

[63] See Li. 2000.

[64] See Li 2000.

[65] http://www.taipeitimes.com/News/editorials/archives/2013/02/04/2003554169

[66] http://topics.amcham.com.tw/2016/03/taiwans-changing-media-landscape

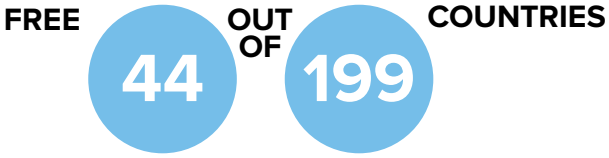
[67] http://ndmt.nownews.com/en/history.html

[68] https://www.directory.dnb.com/profiles/en/STORM-MEDIA-GROUP-4439.html

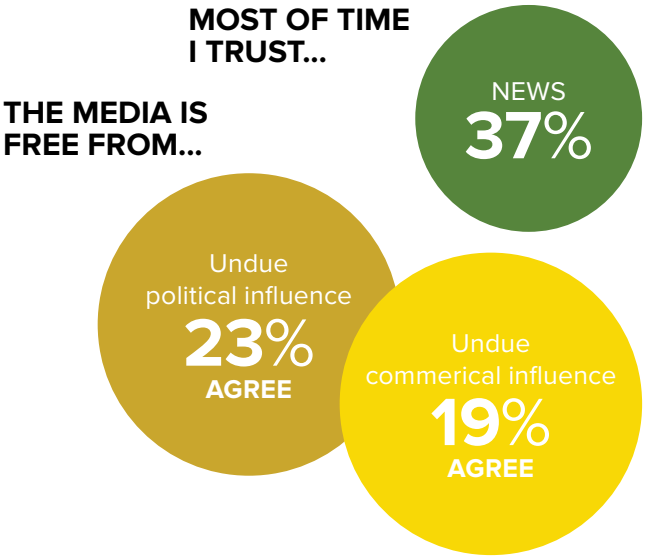
be picked up by the mainstream media.[69] An example is the Sunflower movement:[70] social media were used to coordinate the movement as well as streaming 24-hour live reports from the scene of a student occupation inside the parliament in spring 2014.

Classified as 'Free' by Freedom House, Taiwanese media are amongst the most free in this region. However, political polarisation, self-censorship, and subtle interference from Mainland China remain areas of concern, limiting the diversity of views in the mainstream media.[71] Such a limitation is seen to have resulted from the intertwining political and commercial pressures.[72] The political pressure is reflected, for example, in reports of journalists being pressured by their news organisations to take sides in their political coverage leading up to elections.[73] The economic pressure manifests itself in a growing emphasis on cheap, low-quality entertainment-oriented programming and sensationalist tabloid journalism for commercial gain and shareholder profits has also been observed.[74] Reporters without Borders classify the situation as 'satisfactory' in terms of press freedom.[75]

FREEDOM OF THE PRESS RANKING
(FREEDOM HOUSE)



AMONGST ONLINE NEWS USERS



[69] See Rawnsley et al. 2016.

[70] The Sunflower Student Movement refers to a protest by a coalition of students and civic groups against the legislation of the Cross-Strait Service Trade Agreement (CSSTA) by the ruling party, the Kuomintang (KMT), without a clause-by-clause review. The agreement is aimed at liberalising trade in services between mainland China and Taiwan.

[71] https://freedomhouse.org/report/freedom-press/2015/taiwan

[72] See Rickards 2016, and Rawnsley et al. 2016.

[73] See Rickards 2016.

[74] See Rickards 2016, and Rawnsley et al. 2016.

[75] https://rsf.org/en/ranking_table

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REFERENCES AND FURTHER READING

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