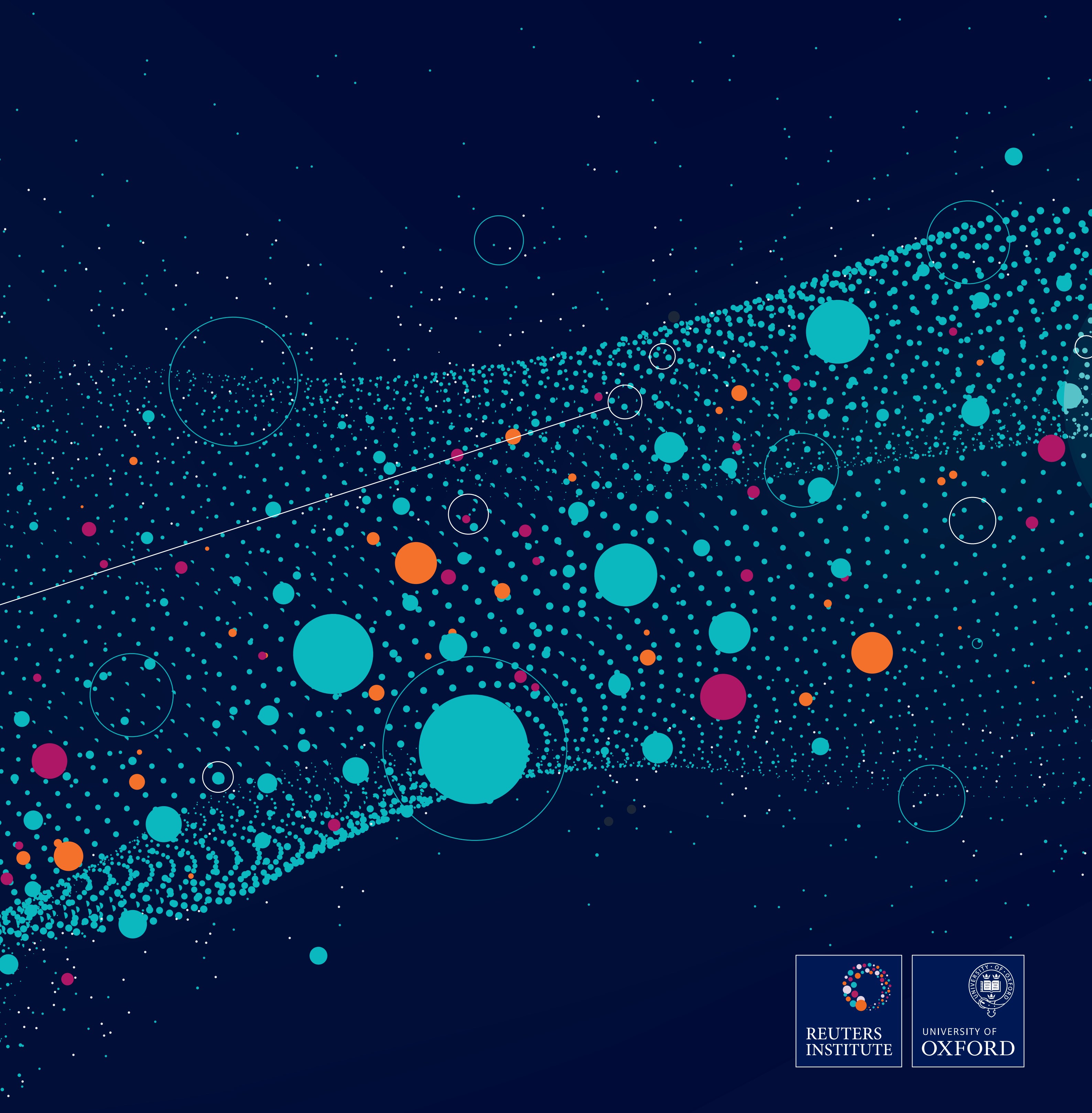
Reuters Institute Digital News Report 2024



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Reuters Institute Digital News Report 2024

Nic Newman with Richard Fletcher, Craig T. Robertson, Amy Ross Arguedas, and Rasmus Kleis Nielsen

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Foreword

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

This year's *Reuters Institute Digital News Report* documents the scale and scope of ongoing 'platform resets' where – even before new advances in generative artificial intelligence further change the information ecosystem – the environment for publishers and others who want to connect with the public is undergoing substantial change.

Legacy social media such as Facebook and X are actively reducing the prominence and role of news on their platforms, and moving further away from a reliance on links driving referrals to publishers, even as increasingly popular platforms of different kinds are growing more important, also for how many people access, find, share, and experience news. Visual and video-led platforms including TikTok, Instagram, and YouTube are all growing in importance, and WhatsApp, with very different forms of discovery and distribution, plays a major role in many countries.

As rival technology companies compete to attract public attention, advertising, and other partners, many of them are also focusing on encouraging a growing multitude of creators, influencers, and various others to post to their platforms. These voices are increasingly getting the most attention also from the public – sometimes even when it comes to news.

Driven by the strategies of competing platform companies, and by how members of the public and those who want to reach them make use of their offers, these changes compound the challenges faced by publishers across the globe who continue to struggle to convince much of the public that the news they offer is trustworthy and worth paying attention to (let alone paying for).

Research documenting these challenges can make for uncomfortable reading, but also provides necessary evidence and insight to help those in journalism and the news industry who are willing to contemplate the need for change to re-engage the wider public – as the Danish publisher Lea Korsgaard has put it, 'People don't miss journalism. But journalism miss people.'

Our report this year is based on data from many of these people, with answers provided by representative samples adding up to almost 100,000 individual survey respondents. With the addition of Morocco, this is the largest report we have ever published, covering 47 markets that together account for more than half the world's population. As we have expanded our work across very different markets, we continue to be selective about where we compare data points across the whole sample and focus more on meaningful comparisons across markets that are broadly similar. We continue to work to improve data quality and provide more detail about differences in polling samples in both the methodology pages and the relevant country pages.

The *Digital News Report* is only possible because we have the privilege of working with a strong network of partners and sponsors around the world. We collaborate with outstanding academics as well as experienced journalists and media experts who help us in many crucial ways, contributing to developing our survey questions and writing many of the country pages but also checking questionnaires in various languages, helping with interpretation, and in many cases publishing their own reports.

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

Making all this possible, we are hugely grateful to our sponsors, in particular to our main sponsor, the Google News Initiative, which continues to support research on a truly global scale, as well as BBC News, Ofcom, the Irish Coimisiún na Meán, the Dutch Media Authority (CvdM), the Media Industry Research Foundation of Finland, the Fritt Ord Foundation, the Korea Press Foundation, Edelman UK, NHK (Japan), and the Reuters News Agency, as well as our academic sponsors at the Leibniz Institute for Media Research/Hans Bredow Institute, the University of Navarra in Spain, the University of Canberra, the Centre d'études sur les médias, Québec, Canada, and Roskilde University, Denmark. Fundación Gabo continues to support the translation of the report into Spanish. We are delighted that YouTube has joined the group of sponsors, and grateful that Code for Africa has increased their support for the report to enable us to include Morocco this year, as we continue to seek to expand our coverage in the majority world.

Methodology

This study has been commissioned by the Reuters Institute for the Study of Journalism to understand how news is being consumed in a range of countries. Research was conducted by YouGov using an online questionnaire at the end of January/beginning of February 2024.

- Samples were assembled using nationally representative quotas for age, gender, and region in every market. Education quotas were also set in all markets except Kenya, Nigeria, Morocco, Peru, and Thailand. We also apply political quotas based on vote choice in the most recent national election in around a third of our markets including the United States, Australia, and much of Western Europe. The data in all markets were weighted to targets based on census/industry accepted data.
- Data from India, Kenya, Nigeria, and South Africa are representative of younger English-speakers and not the national population, because it is not possible to reach other groups in a representative way using an online survey. The survey was fielded mostly in English in these markets,[1] and restricted to ages 18 to 50 in Kenya and Nigeria. Findings should not be taken to be nationally representative in these countries.
- More generally, online samples will tend to under-represent the news consumption habits of people who are older and less affluent, meaning online use is typically over-represented and traditional offline use under-represented. In this sense, it is better to think of results as representative of the *online* population. In markets in Northern and Western Europe, where internet penetration is typically over 95%, the differences between the online population and national population will be small, but in South Africa (58%) and India (60%), where internet penetration is lower, the differences between the online population and the national population will be large, meaning we need to be cautious when comparing between markets.
- The use of a non-probability sampling approach means that it is not possible to compute a conventional 'margin of error' for individual data points. However, differences of +/- 2 percentage points (pp) or less are very unlikely to be statistically significant and should be interpreted with a very high degree of caution. We typically do not regard differences of +/- 2pp as meaningful, and as a general rule we do not refer to them in the text. The same applies to small changes over time.
- Surveys capture people's self-reported behaviour, which does not always reflect people's actual behaviour due to biases and imperfect recall. They are useful for capturing people's opinions, but these are subjective and reflect public opinion rather than objective reality.[2] Even with relatively large sample sizes it is not possible to meaningfully analyse many minority groups. Some of our survey-based results will not match industry data, which are often based on different methodologies, such as web-tracking.
- A fuller description of the methodology, panel partners, and a discussion of non-probability sampling techniques can be found on our website along with the full questionnaire reutersinstitute.politics.ox.ac.uk.

Market	Sample size	Population	Internet penetration
Europe			
UK	2,107	68m	95%
Austria	2,015	9.1m	88%
Belgium	2,050	11.7m	92%
Bulgaria	2,027	6.9m	70%
Croatia	2,007	4m	93%
Czech Republic	2,009	10.7m	87%
Denmark	2,011	5.8m	98%
Finland	2,015	5.6m	94%
France	2,010	66m	92%
Germany	2,012	84m	94%
Greece	2,020	10m	79%
Hungary	2,023	9.6m	89%
Ireland	2,034	5m	92%
Italy	2,015	60m	91%
Netherlands	2,037	17m	95%
Norway	2,024	5.5m	98%
Poland	2,000	38m	92%
Portugal	2,012	10m	88%
Romania	2,007	19m	78%
Slovakia	2,013	5.5m	90%
Spain	2,060	47m	93%
Sweden	2,018	10m	97%
Switzerland	2,012	8.8m	96%
Turkey	2,082	86m	85%
Americas			
USA	2,023	331m	90%
Argentina	2,023	46m	91%
Brazil	2,022	215m	83%
Canada	2,014	38m	94%
Chile	2,026	19m	97%
Colombia	2,025	52m	83%
Mexico	2,030	132m	67%
Peru	2,013	34m	87%
Asia-Pacific			
Australia	2,003	26m	90%
Hong Kong	2,005	7.6m	92%
India	2,016	1,402m	60%
Indonesia	2,008	278m	76%
Japan	2,019	127m	93%
Malaysia	2,012	33m	94%
Philippines	2,014	112m	91%
Singapore	2,013	5.9m	92%
South Korea	2,015	51m	97%
Taiwan	2,011	24m	95%
Thailand	2,008	70m	88%
Africa			
Kenya	2,043	56m	85%
Morocco	2,022	37m	69%
Nigeria	2,035	211m	73%
South Africa	2,013	60m	58%

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

[1] Respondents in India could choose to complete the survey in Hindi and respondents in Kenya could chose Swahili, but in both cases the vast majority selected an English survey.
[2] From 2012 to 2020 we filtered out respondents who said that they had not consumed any news in the past month. From 2021 onwards we included this group, which generally has lower interest in news. In previous years this group averaged around 2–3% of the starting sample in each market, meaning that the decision to include it has not affected comparative results in any significant way. Some figures have been affected by one or two points in the UK, USA, and Australia, and we have taken this into account when interpreting changes involving these years.

Authorship and Research Acknowledgements

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

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

Dr Craig T. Robertson is a Postdoctoral Research Fellow at the Reuters Institute for the Study of Journalism whose interests include trends in news consumption, audience trust in and perceptions of news, and the impacts of technology on the news industry.

Dr Amy Ross Arguedas is a Postdoctoral Research Fellow in Digital News at the Reuters Institute for the Study of Journalism. She has worked extensively on issues around trust in media and previously worked as a journalist for the Costa Rican newspaper *La Nación*.

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

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

SECTION 1

SECTION 1

Executive Summary and Key Findings

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

This year's report comes at a time when around half the world's population have been going to the polls in national and regional elections, and as wars continue to rage in Ukraine and Gaza. In these troubled times, a supply of accurate, independent journalism remains more important than ever, and yet in many of the countries covered in our survey we find the news media increasingly challenged by rising mis- and disinformation, low trust, attacks by politicians, and an uncertain business environment.

Our country pages this year (pp. 61-163) are filled with examples of layoffs, closures, and other cuts due to a combination of rising costs, falling advertising revenues, and sharp declines in traffic from social media. In some parts of the world these economic challenges have made it even harder for news media to resist pressures from powerful businesspeople or governments looking to influence coverage and control narratives.

There is no single cause for this crisis; it has been building for some time, but many of the immediate challenges are compounded by the power and changing strategies of rival big tech companies, including social media, search engines, and video platforms. Some are now explicitly deprioritising news and political content, while others have switched focus from publishers to 'creators', and pushing more fun and engaging formats – including video – to keep more attention within their own platforms. These private companies do not have any obligations to the news, but with many people now getting much of their information via these competing platforms, these shifts have consequences not only for the news industry, but also our societies. As if this were not enough, rapid advances in artificial intelligence (AI) are about to set in motion a further series of changes including AI-driven search interfaces and chatbots that could further reduce traffic flows to news websites and apps, adding further uncertainty to how information environments might look in a few years.

Our report this year documents the scale and impact of these 'platform resets'. With TikTok, Instagram Reels, and YouTube on the rise, we look at why consumers are embracing more video consumption and investigate which mainstream and alternative accounts – including creators and influencers – are getting most attention when it comes to news. We also explore the very different levels of confidence people have in their ability to distinguish between trustworthy and untrustworthy content on a range of popular third-party platforms around the world. For the first time in our survey, we also take a detailed look at consumer attitudes towards the use of AI in the news, supported by qualitative research in three countries (the UK, US, and Mexico). As publishers rapidly adopt AI, to make their businesses more efficient and to personalise content, our research suggests they need to proceed with caution, as the public generally wants humans in the driving seat at all times.

With publishers struggling to connect with much of the public, and growing numbers of people selectively (and in some cases continuously) avoiding the news, we have also explored different user needs to understand where the biggest gaps lie between what audiences want and what publishers currently provide. And we look at the price that some consumers are currently paying for online news and what might entice more people to join them.

This 13th edition of our *Digital News Report*, which is based on data from six continents and 47 markets, reminds us that these changes are not always evenly distributed. While journalism is struggling overall, in some parts of the world news media remain profitable, independent, and widely trusted. But even in these countries, we find challenges around the pace of change, the role of platforms, and how to adapt to a digital environment that seems to become more complex and fragmented every year. The overall story is captured in this Executive Summary, followed by Section 2 with chapters containing additional analysis, and then individual country and market pages in Section 3.

A SUMMARY OF SOME OF THE KEY FINDINGS FROM OUR 2024 RESEARCH

- In many countries, especially outside Europe and the United States, we find a significant further decline in the use of Facebook for news and a growing reliance on a range of alternatives including private messaging apps and video networks. Facebook news consumption is down 4 percentage points, across all countries, in the last year.
- News use across online platforms is fragmenting, with six networks now reaching at least 10% of our respondents, compared with just two a decade ago. YouTube is used for news by almost a third (31%) of our global sample each week, WhatsApp by around a fifth (21%), while TikTok (13%) has overtaken Twitter (10%), now rebranded X, for the first time.
- Linked to these shifts, video is becoming a more important source of online news, especially with younger groups. Short news videos are accessed by two-thirds (66%) of our sample each week, with longer formats attracting around half (51%). The main locus of news video consumption is online platforms (72%) rather than publisher websites (22%), increasing the challenges around monetisation and connection.
- Although the platform mix is shifting, the majority continue to identify platforms including social media, search, or aggregators as their main gateway to online news. Across markets, only around a fifth of respondents (22%) identify news websites or apps as their main source of online news – that's down 10 percentage points on 2018. Publishers in a few Northern European markets have managed to buck this trend, but younger groups everywhere are showing a weaker connection with news brands than they did in the past.
- Turning to the sources that people pay most attention to when it comes to news on various platforms, we find an increasing focus on partisan commentators, influencers, and young news creators, especially on YouTube and TikTok. But in social networks such as Facebook and X, traditional news brands and journalists still tend to play a prominent role.
- Concern about what is real and what is fake on the internet when it comes to online news has risen by 3 percentage points in the last year with around six in ten (59%) saying they are concerned. The figure is considerably higher in South Africa (81%) and the United States (72%), both countries that have been holding elections this year.
- Worries about how to distinguish between trustworthy and untrustworthy content in online platforms is highest for TikTok and X when compared with other online networks. Both platforms have hosted misinformation or conspiracies around stories such as the war in Gaza, and the Princess of Wales's health, as well as so-called 'deep fake' pictures and videos.

- As publishers embrace the use of AI we find widespread suspicion about how it might be used, especially for 'hard' news stories such as politics or war. There is more comfort with the use of AI in behind-the-scenes tasks such as transcription and translation; in supporting rather than replacing journalists.
- Trust in the news (40%) has remained stable over the last year, but is still four points lower overall than it was at the height of the Coronavirus pandemic. Finland remains the country with the highest levels of overall trust (69%), while Greece (23%) and Hungary (23%) have the lowest levels, amid concerns about undue political and business influence over the media.
- Elections have increased interest in the news in a few countries, including the United States (+3), but the overall trend remains downward. Interest in news in Argentina, for example, has fallen from 77% in 2017 to 45% today. In the United Kingdom interest in news has almost halved since 2015. In both countries the change is mirrored by a similar decline in interest in politics.
- At the same time, we find a rise in selective news avoidance. Around four in ten (39%) now say they sometimes or often avoid the news – up 3 percentage points on last year's average – with more significant increases in Brazil, Spain, Germany, and Finland. Open comments suggest that the intractable conflicts in Ukraine and the Middle East may have had some impact. In a separate question, we find that the proportion that say they feel 'overloaded' by the amount of news these days has grown substantially (+11pp) since 2019 when we last asked this question.
- In exploring *user needs* around news, our data suggest that publishers may be focusing too much on updating people on top news stories and not spending enough time providing different perspectives on issues or reporting stories that can provide a basis for occasional optimism. In terms of topics, we find that audiences feel mostly well served by political and sports news but there are gaps around local news in some countries, as well as health and education news.
- Our data show little growth in news subscription, with just 17% saying they paid for any online news in the last year, across a basket of 20 richer countries. North European countries such as Norway (40%) and Sweden (31%) have the highest proportion of those paying, with Japan (9%) and the United Kingdom (8%) amongst the lowest. As in previous years, we find that a large proportion of digital subscriptions go to just a few upmarket national brands – reinforcing the *winner takes most* dynamics that are often linked with digital media.
- In some countries we find evidence of heavy discounting, with around four in ten (41%) saying they currently pay less than the full price. Prospects of attracting new subscribers remain limited by a continued reluctance to pay for news, linked to low interest and an abundance of free sources. Well over half (55%) of those that are not currently subscribing say that they would pay nothing for online news, with most of the rest prepared to offer the equivalent of just a few dollars per month, when pressed. Across markets, just 2% of non-payers say that they would pay the equivalent of an average full price subscription.
- News podcasting remains a bright spot for publishers, attracting younger, well-educated audiences but is a minority activity overall. Across a basket of 20 countries, just over a third (35%) access a podcast monthly, with 13% accessing a show relating to news and current affairs. Many of the most popular podcasts are now filmed and distributed via video platforms such as YouTube and TikTok.

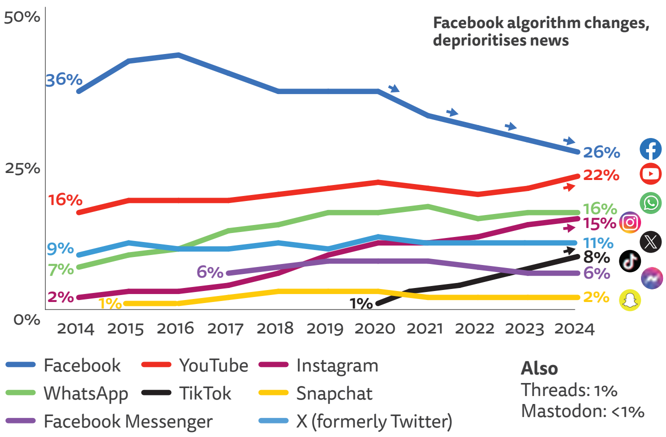
THE GREAT PLATFORM RESET IS UNDERWAY

Online platforms have shaped many aspects of our lives over the last few decades, from how we find and distribute information, how we are advertised to, how we spend our money, how we share experiences, and most recently, how we consume entertainment. But even as online platforms have brought great convenience for consumers – and advertisers have flocked to them – they have also disrupted traditional publishing business models in very profound ways. Our data suggest we are now at the beginning of a technology shift which is bringing a new wave of innovation to the platform environment, presenting challenges for incumbent technology companies, the news industry, and for society.

Platforms have been adjusting strategies in the light of generative AI, and are also navigating changing consumer behaviour, as well as increased regulatory concerns about misinformation and other issues. Meta in particular has been trying to reduce the role of news across Facebook, Instagram, and Threads, and has restricted the algorithmic promotion of political content. The company has also been reducing support for the news industry, not renewing deals worth millions of dollars, and removing its news tab in a number of countries.[3]

The impact of these changes, some which have been going on for a while, is illustrated by our first chart which uses aggregated data from 12 mostly developed markets we have been following since 2014. It shows declining, though still substantial, reach for Facebook over time – down 16pp since 2016 – as well as increased fragmentation of attention across multiple networks. A decade ago, only Facebook and YouTube had a reach of more than 10% for news in these countries, now there are many more networks, often being used in combination (several of them are owned by Meta). Taken together, platforms remain as important as ever – but the role and strategy of individual platforms is changing as they compete and evolve, with Facebook becoming less important, and many others becoming relatively more so.

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

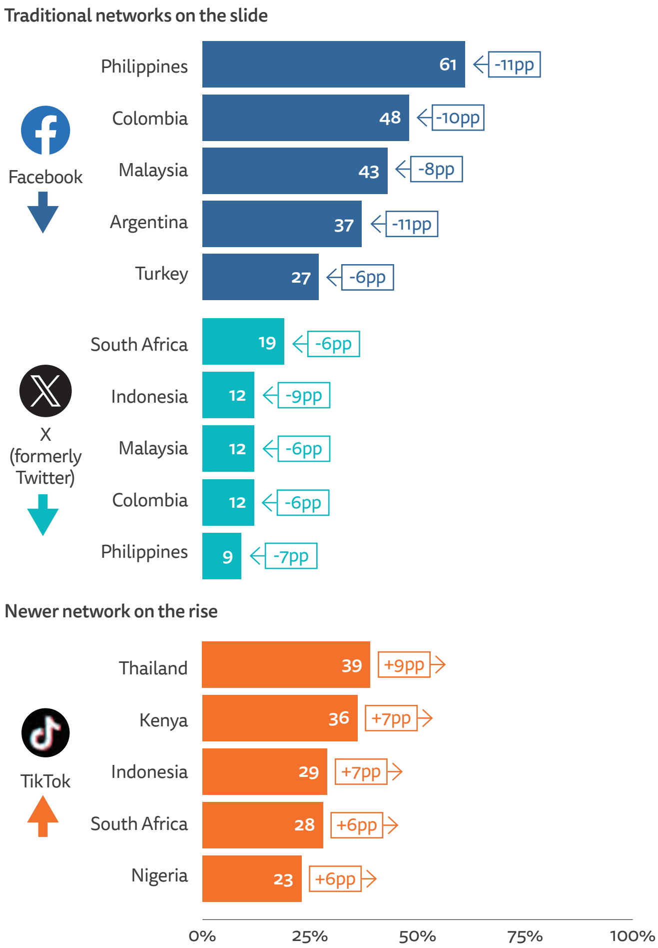


Q12b. Which, if any, of the following have you used for news in the last week? *Base: Total sample in each country-year in UK, USA, Germany, France, Spain, Italy, Denmark, Finland, Japan, Australia (2014-24), Brazil, and Ireland (2015-24) ≈ 2000.*

[3] https://www.theguardian.com/technology/2024/mar/26/instagram-meta-political-content-opt-in-rules-threads

The previous chart also highlights the strong shift towards video-based networks such as YouTube, TikTok (and Instagram), all of which have grown in importance for news since the COVID-19 pandemic drove new habits. Faced with new competition, both Facebook and X have been refocusing their strategies, looking to keep users within the platform rather than link out to publishers as they might have done in the past. This has involved a prioritisation of video and other proprietary formats. Industry data show that the combined effect of these changes was to reduce traffic referrals from Facebook to publishers by 48% last year and from X by 27%.[4] Looking at survey data across our 47 markets we find much regional and country-based variation in the use of different networks, with the fastest changes in the Global South, perhaps because they tend to be more dependent on social media for news.

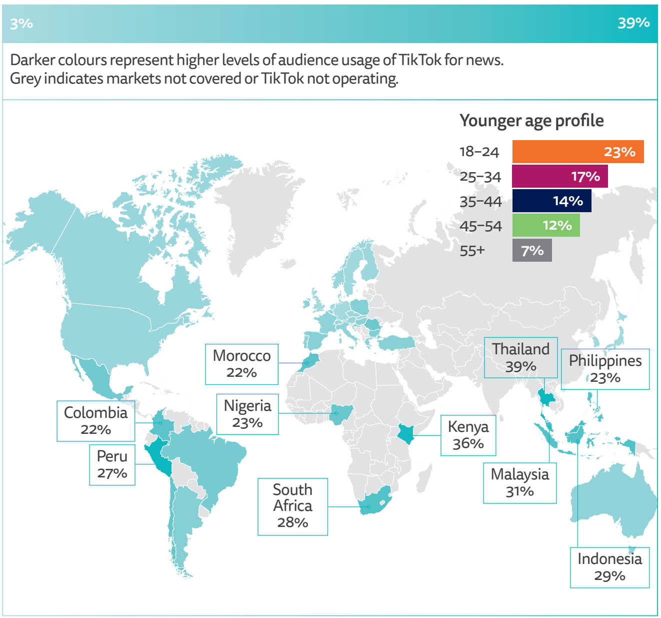
PROPORTION THAT USED EACH NETWORK FOR NEWS IN THE LAST WEEK - SELECTED COUNTRIES



Q12b. Which, if any, of the following have you used for news in the last week? *Base: Total sample in each country ≈ 2000. Note: Respondents in India and Hong Kong were not asked about TikTok.*

TikTok remains most popular with younger groups and, although its use for any purpose is similar to last year, the proportion using it for news has grown to 13% (+2) across all markets and 23% for 18–24s. These averages hide rapid growth in Africa, Latin America, and parts of Asia. More than a third now use the network for news every week in Thailand (39%) and Kenya (36%), with a quarter or more accessing it in Indonesia (29%) and Peru (27%). This compares with just 4% in the UK, 3% in Denmark, and 9% in the United States. The future of TikTok remains uncertain in the US following concerns about Chinese influence and it is already banned in India, though similar apps, such as Moj, Chingari, and Josh, are emerging there.

PROPORTION THAT USED TIKTOK FOR NEWS IN THE LAST WEEK
Top ten markets are all in the Global South



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

The growing reach of TikTok and other youth-orientated networks has not escaped the attention of politicians who have incorporated it into their media campaigns. Argentina's new populist president, Javier Milei, runs a successful TikTok account with 2.2m followers while the new Indonesian president, Prabowo Subianto, swept to victory in February using a social media campaign featuring AI-generated images, rebranding the former hard-line general as a cute and charming dancing grandpa. We explore the implications for trust and reliability of information later in this report.

For further information see Section 3, relevant country pages: Argentina p. 116, Indonesia p. 138

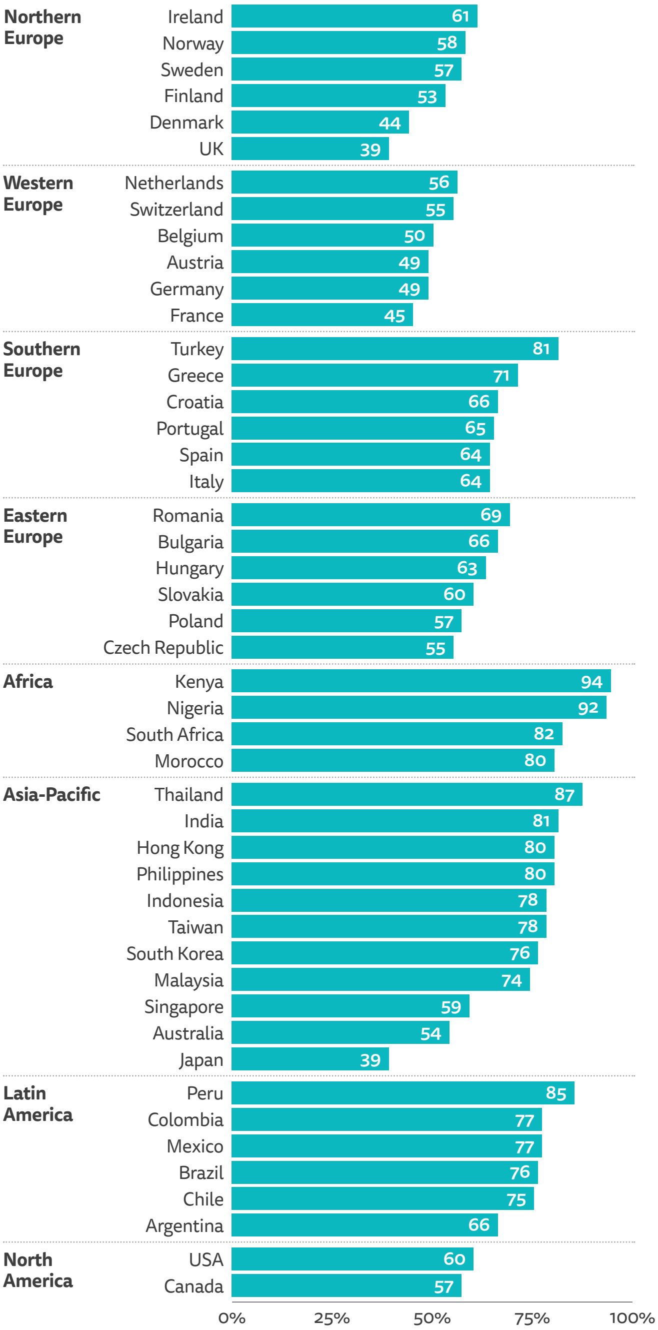
SHIFT TO VIDEO NETWORKS BRINGS DIFFERENT DYNAMICS

Traditional social networks such as Facebook and Twitter were originally built around the social graph – effectively this means content posted directly by friends and contacts (connected content). But video networks such as YouTube and TikTok are focused more on content that can be posted by anybody – recommended content that does not necessarily come from accounts users have chosen to follow.

[4] https://reutersinstitute.politics.ox.ac.uk/journalism-media-and-technology-trends-and-predictions-2024

In previous research (*Digital News Report 2021, 2023*) we have shown that when it comes to online news, most audiences still prefer text because of its flexibility and control, but that doesn't mean that video – and especially short-form video – is not becoming a much bigger part of media diets. Across countries, two-thirds (66%) say they access a short news video, which we defined as a few minutes or less, at least once a week, again with higher levels outside the US and Western Europe. Almost nine in ten of the online population in Thailand (87%), access short-form videos weekly, with half (50%) saying they do this every day. Americans access a little less often (60% weekly and 20% daily), while the British consume the least short-form news (39% weekly and just 9% daily).

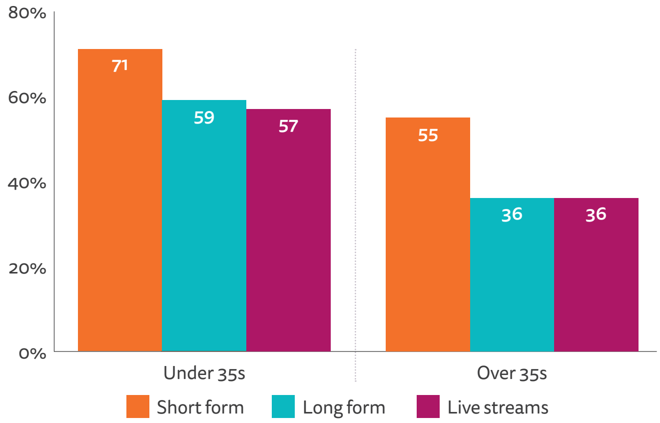
PROPORTION THAT USE SHORT FORM ONLINE NEWS VIDEO WEEKLY – ALL MARKETS



Q11_video_2024. Thinking about when you have used online videos about news-related issues – e.g. via a computer, smartphone, or tablet – how often, if at all, do you watch the following? – Short online news video(s) (a few minutes or less). *Base: Total sample in each market ≈ 2000.*

Live news streams and long-form recordings are also widely consumed. Taking the United States as an example, we can see how under 35s consume the most of each format, with older people being relatively less likely to consume live or long-form video.

PROPORTION THAT USE EACH FORM OF NEWS VIDEO WEEKLY BY AGE GROUP - USA



Q11_video_2024. Thinking about when you have used online videos about news-related issues – e.g. via a computer, smartphone, or tablet – how often, if at all, do you watch the following? – Short online news video(s) (a few minutes or less)/ Longer online news video(s)/ Live online video stream(s) (e.g. breaking news event or live discussion). *Base: U35s/35+ = 649/1374.*

One of the reasons why news video consumption is higher in the United States than in most European countries is the abundant supply of political content from both traditional and non-traditional sources. Some are creators native to online media. Others have come from broadcast backgrounds. In the last few years, a number of high-profile TV anchors, including Megyn Kelly, Tucker Carlson, and Don Lemon, have switched their focus to online platforms as they look to take advantage of changing consumer behaviour.

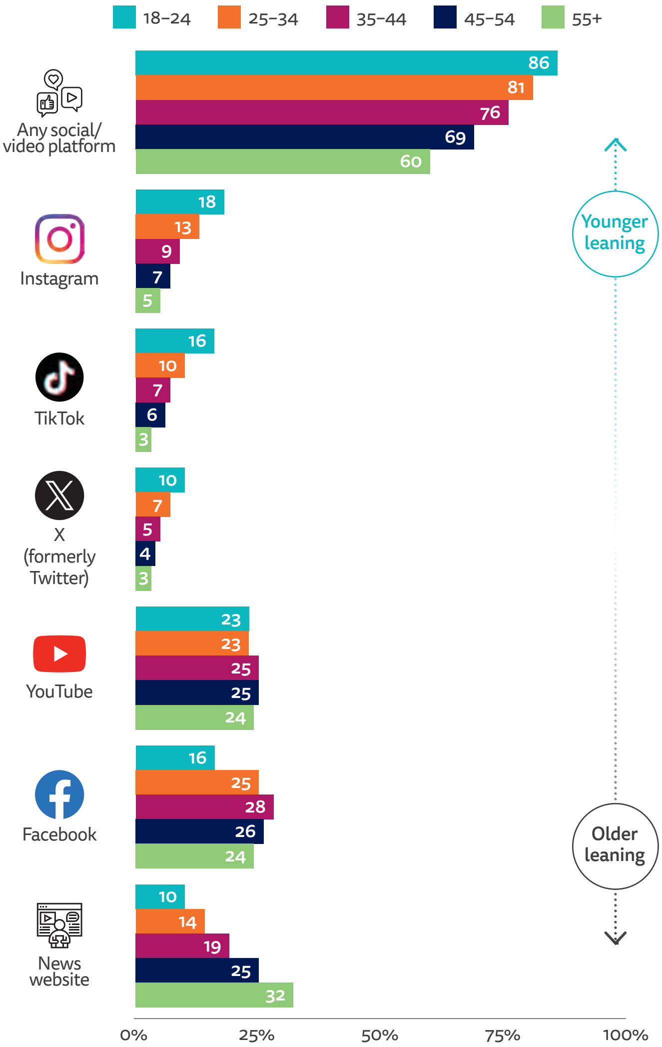
Carlson's interview with Russian president Vladimir Putin received more than 200m plays on X and 34m on his YouTube channel. In the UK, another controversial figure, Piers Morgan, recently left his daily broadcast show on Talk TV in favour of the flexibility and control offered as an independent operator working across multiple streaming platforms. (It is worth noting that many of these platform moves came only after the person in question walked out on or were ditched by their former employers on mainstream TV.)

The jury is currently out on whether these big personalities can build robust traffic or sustainable businesses within platform environments. There is a similar challenge for mainstream publishers who find platform-based videos harder to monetise than those consumed via owned and operated websites and apps.

YouTube and Facebook remain the most important platforms for online news video overall (see next chart) but we see significant market differences, with Facebook the most popular for video news in the Philippines, YouTube in South Korea, and X and TikTok playing a key role in Nigeria and Indonesia respectively. YouTube is also the top destination for under 25s, though TikTok and Instagram are not far behind.

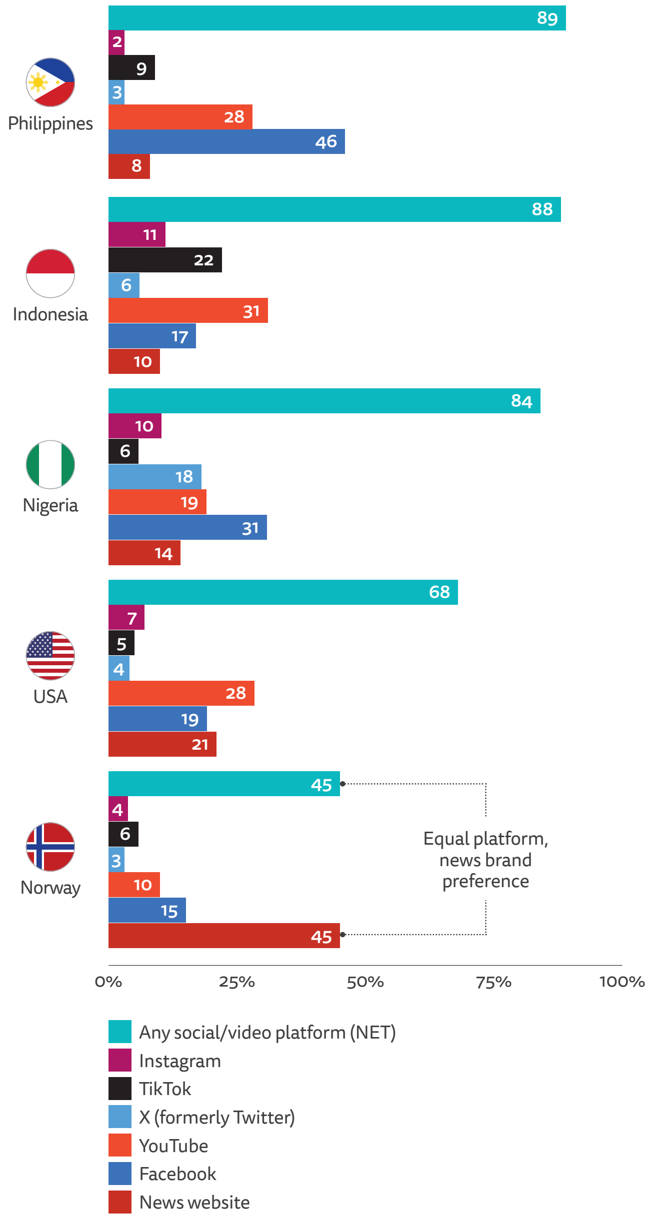
Older viewers still like to consume much of their video through news websites, though the majority say they mostly access video via third-party platforms. Only in countries such as Norway do we find that getting on for half of users (45%) say their main video consumption is via websites, a reflection of the strength of brands in that market, a commitment to a good user experience, and a strategy that restricts the number of publisher videos that are posted to platforms like Facebook and YouTube.

PROPORTION THAT SAY EACH IS THEIR MAIN ONLINE NEWS VIDEO PLATFORM BY AGE GROUP – ALL MARKETS



Q11_video_2024_channel. Which of the following do you tend to use most, when it comes to watching online news or news-related videos? *Base: 18-24/25-34/35-44/45-54/55+ who use online news-related videos in all markets = 10,024/15,332/15,177/13,729/26,517.*

PROPORTION THAT SAY EACH IS THEIR MAIN ONLINE NEWS VIDEO PLATFORM - SELECTED MARKETS



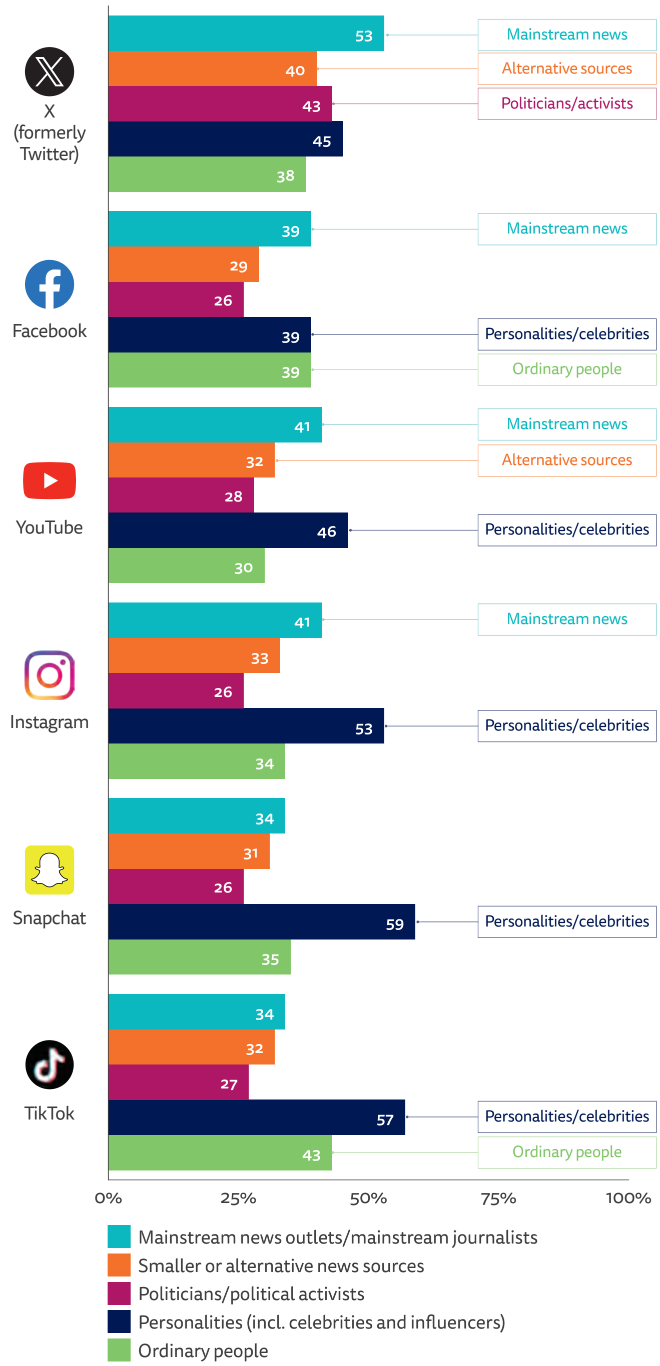
Q11_video_2024_channel. Which of the following do you tend to use most, when it comes to watching online news or news-related videos? *Base: All who use online news-related videos in Philippines = 1915, Indonesia = 1837, Nigeria = 2006, USA = 1630, Norway = 1706. Note: Snapchat (not shown) is relatively widely used for video in Norway (5%) but not in other markets.*

Where do people pay attention when using online platforms?

One of the big challenges of the shift to video networks with a younger age profile is that journalists and news organisations are often eclipsed by news creators and other influencers, even when it comes to news.

This year we repeated a question we asked first in 2021 about where audiences pay most attention when it comes to news on various platforms. As in previous years, we find that across markets, while mainstream media and journalists often lead conversations in X and Facebook, they struggle to get as much attention in Instagram, Snapchat, and TikTok where alternative sources and personalities, including online influencers and celebrities, are often more prominent.

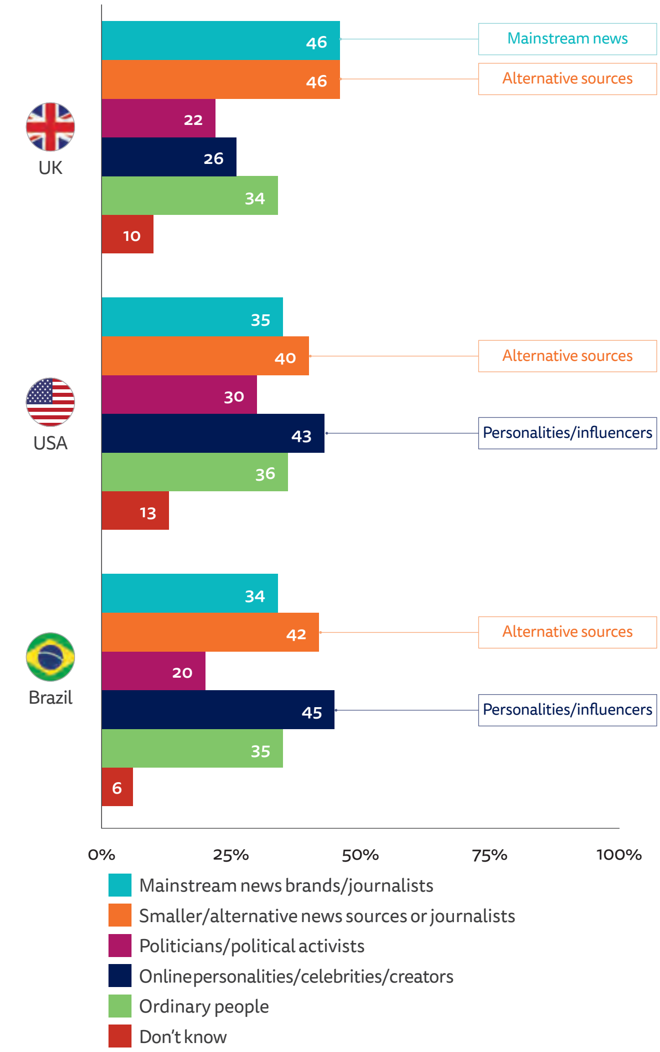
PROPORTION THAT PAY ATTENTION TO EACH SOURCE OF NEWS ON EACH NETWORK – ALL MARKETS



Q12_Social_sources. You said that you use <online platform> for news … When it comes to news on <online platform>, which of these sources do you generally pay most attention to? Please select all that apply. *Base: Randomly selected news users of Facebook = 22,441, X = 5414, YouTube = 17,614, Instagram = 8997, Snapchat = 909, TikTok = 5694.*

It is a similar story across many markets, though differences emerge when we look at specific online networks and at a country level. In the following chart we compare attention around news content on YouTube, the second largest network overall. We find that alternative sources and online influencers play a bigger role in both the United States and Brazil than is the case in the United Kingdom.

PROPORTION THAT PAY ATTENTION TO EACH SOURCE OF NEWS ON YOUTUBE – SELECTED COUNTRIES



Q12_Social_sources. You said that you use YouTube for news … When it comes to news on YouTube, which of these sources do you generally pay most attention to? Please select all that apply. *Base: Randomly selected YouTube news users in UK = 167, USA = 348, Brazil = 460.*

But who are these personalities and celebrities and what kind of alternative sources are attracting attention? To answer these questions, we asked respondents that had selected each option to list up to three mainstream accounts they followed most closely and then three alternative ones (e.g. alternative accounts, influencers, etc). We then counted and coded these responses.

In the United States, in particular, we find a wide range of politically partisan voices including Tucker Carlson, Alex Jones (recently reinstated on X), Ben Shapiro, Glenn Beck, and many more. These voices come mostly from the right, with a narrative around a 'trusted' alternative to what they see as the biased liberal mainstream media, but there is also significant representation on the progressive left (David Pakman and commentators from Meidas Touch). The top 10 named individuals in the US list are all men who tend to express strong opinions about politics.

For further analysis see Section 2.5: What do we Know about the Rise of Alternative Voices and News Influencers in Social and Video Networks?

Partisan voices (from both left and right) are an important part of the picture elsewhere, but we also find diverse perspectives and new approaches to storytelling. In France, Hugo Travers, 27, known online as Hugo Décrypte, has become a leading news source for young French people for his explanatory videos about politics (2.6m subscribers on YouTube and 5.8m on TikTok). Our data show that across all networks he gets more mentions than traditional news brands such as *Le Monde* or BFMTV. According to our data, the average audience age of his followers is just 27, compared to between 40 and 45 for large traditional brands such as *Le Monde* or BFMTV.

Youth-focused brands Brut and Konbini were also widely cited in France, while in the UK, Politics Joe and TLDR News, set up by Jack Kelly, attract attention for videos that try to make serious topics accessible for young people. The most mentioned TikTok news creator in the UK is Dylan Page, who has more than 10m followers on the platform. In the United States, Vitus Spehar presents a fun daily news round-up, often from a prone v on the floor, @underthedesknews (a satirical dig at the classic TV format).

YOUTH-BASED NEWS INFLUENCERS AROUND THE WORLD


Hugo Travers


Jack Kelly


Vitus Spehar

Coverage of war and conflict

We also found a number of accounts sharing videos about the wars in Gaza and Ukraine. With mainstream news access restricted, young social media influencers in Gaza, Yemen, and elsewhere have been filling in the gaps – documenting the often-brutal realities of life on the ground. Because these videos are posted by many different accounts and ordinary people, it is hard to quantify the impact, but our methodology does pick up a few individual influencer accounts as well as campaigning groups that pull together footage from across social media. As one example, the Instagram account Eye on Palestine appears in our data across a number of countries. The account says it brings 'the sounds and images that official media does not show'. WarMonitor, one of a number of influential accounts that have been recommended by prominent figures such as Elon Musk, has added hundreds of thousands of followers during the Israel–Palestine conflict.

Eye on Palestine
One of many accounts highlighting the devastation in Gaza
11m followers on Instagram

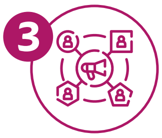
Finally, celebrities such as Taylor Swift, the Kardashians, and Lionel Messi were widely mentioned by younger people, mostly in reference to Instagram, despite the fact that they rarely talk about politics. This suggests that younger people take a wide view of news, potentially including updates on a singer's tour dates, on fashion, or on football.

Motivations for using social video

In analysing open comments, we found three core reasons why audiences are attracted to video and other content in social and video platforms.

Seeing is believing
'You can trust it more'

Convenience
'Aligns with my interests'



Diverse perspectives
'Variety of opinions.
Not just mainstream media'

First, respondents, including many younger ones, say the comparatively unfiltered nature of much of the coverage makes it come across as *more trustworthy* and authentic than traditional media. 'I like the videos that were taken by an innocent bystander. These videos are unedited and there is no bias or political spin,' says one.[5] There is an enduring belief that videos are harder to falsify, while enabling people to make up their own mind, even as the development of AI may lead more people to question it.

Secondly, people talk about the *convenience* of having news served to you on a platform where you already spend time, which knows your interests, and where 'the algorithm feeds suggestions based on previous viewing'.

> ***They are short, easy-to-watch clips that are sufficient to provide news in a nutshell***
> *Male, 39, USA*

Thirdly, social video platforms are valued for the *different perspectives* they bring. For some people that meant a partisan perspective that aligns with their interests, but for others it related to the greater depth around a personal passion or a wider range of topics to explore.

> ***I can find something on nearly any topic, many different worldviews and perspectives, long videos for deep-dives, short form for a quick look, and everything in between.***
> *Female, 23, USA*

[5] While not necessarily a reliable indicator of underlying trustworthiness, such reliance on 'realism heuristics' also helps shape often high trust in television news versus other sources.

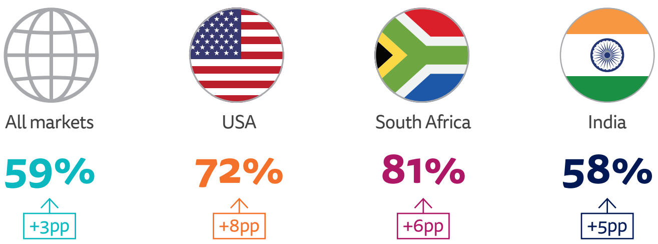
It is important to note that very few people *only* use online video for news each week – around 4% across countries according to our data. The majority use a mix of text, video, and audio – and a combination of mainstream brands that may or may not be supplemented by alternative voices. But as audiences consume more content in these networks, they sometimes worry less about where the content comes from, and more about the convenience and choice delivered within their feed. Though there are examples of successful video consumption within news websites and apps, for most publishers the shift towards video presents a difficult balancing act. How can they take advantage of a format that can engage audiences in powerful ways, including younger ones, while developing meaningful relationships – and businesses – on someone else's platform?

TO WHAT EXTENT DO PEOPLE FEEL CONFIDENT ABOUT IDENTIFYING TRUSTWORTHY NEWS IN DIFFERENT ONLINE PLATFORMS?

In this critical year of elections, many worry about the reliability of content, about the scope for manipulation of online platforms by 'bad actors', over how some domestic politicians and media personalities express themselves, and about the opaque ways in which platforms themselves select and promote content.

Across markets, the proportion of our respondents that say they are worried about what is real and what is fake on the internet overall is up 3pp from 56% to 59%. It is highest in some of the countries holding polls this year, including South Africa (81%), the United States (72%), and the UK (70%). Taking a regional view, we find the highest levels of concern in Africa (75%) and lower levels in much of Northern and Western Europe (e.g. Norway 45% and Germany 42%).

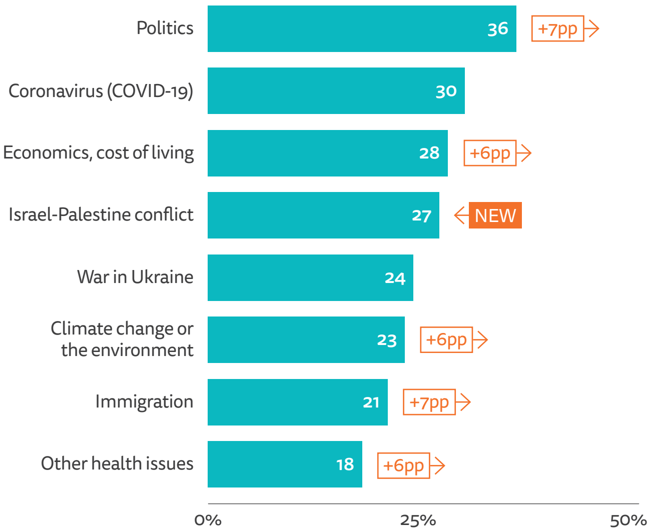
PROPORTION CONCERNED ABOUT WHAT IS REAL AND WHAT IS FAKE WHEN IT COMES TO NEWS ONLINE



Q_FAKE_NEWS_1. Please indicate your level of agreement with the following statement. 'Thinking about online news, I am concerned about what is real and what is fake on the internet.' *Base: Total sample in all markets = 94,943, USA = 2023, South Africa = 2013, India = 2016.*

Previous research shows that these audience concerns about misinformation are often driven less by news that is completely 'made up' and more about seeing opinions and agendas that they may disagree with – as well as journalism they regard as superficial and unsubstantiated. In this context it is perhaps not surprising that politics remains the topic that engenders the most concern about 'fake or misleading' content, along with health information and news about the wars in Ukraine and Gaza.

PROPORTION THAT SAY THEY HAVE SEEN FALSE OR MISLEADING INFORMATION ABOUT EACH TOPIC IN THE LAST WEEK – ALL MARKETS



Q_FAKE_NEWS_2021a. Have you seen false or misleading information about any of the following topics, in the last week? Please select all that apply. *Base: Total sample in all markets = 94,943.*

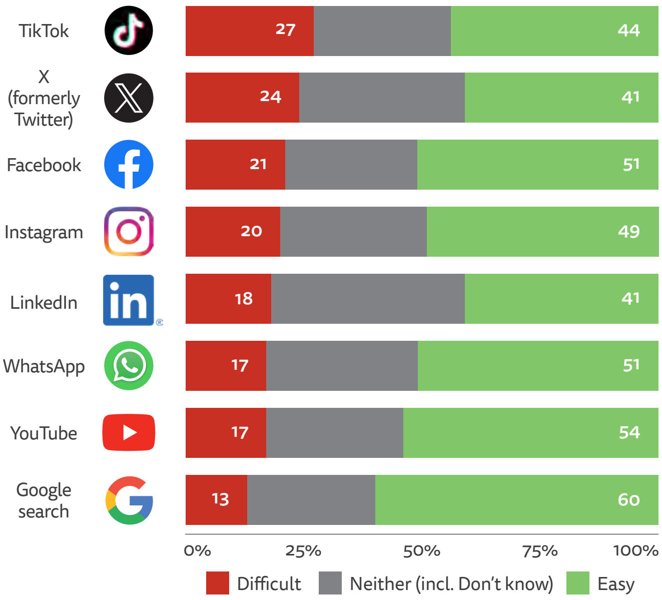
Against this backdrop of widespread concern, we have, for the first time, asked users of specific online platforms, how easy or difficult they find it to distinguish between trustworthy and untrustworthy content. Given its increasing use for news – and its much younger age profile – it is worrying to find that more than a quarter of TikTok users (27%) say they struggle to detect trustworthy news, the highest score out of all the networks covered. A further quarter have no strong opinion and around four in ten (44%) say they find it easy. Fact-checkers and others have been paying much more attention to the network recently, with Newsguard reporting in 2022 that a fifth (20%) of a sample of searches on prominent news topics such as Ukraine and COVID vaccines contained misinformation.[6] Most recently it was at the centre of a flood of unfounded rumours and conspiracies about the Princess of Wales after her hospital operation. A significant proportion of X users (24%) also say that it is hard to pick out trustworthy news. This may be because news plays an outsized role on the platform, or because of the wide range of views expressed, further encouraged by Elon Musk, a self-declared free speech advocate, since he took over the company.

The numbers are only a bit lower in some of the largest networks such as Facebook, Instagram, YouTube, and WhatsApp, which have all been implicated in various misinformation problems too.

While there is widespread concern about different networks, it is also important to recognise that many people are confident about their ability to tell trustworthy and untrustworthy news and information apart. In fact, around half of respondents using each network say they find it easy to do so, including many younger and less educated users – even if these perceptions may or may not be based on reality. All of the major social and video platforms recognise these challenges, and have been boosting their technical and human defences, not least because of the potential for a flood of AI-generated synthetic content in this year's elections.

[6] https://www.newsguardtech.com/misinformation-monitor/september-2022/

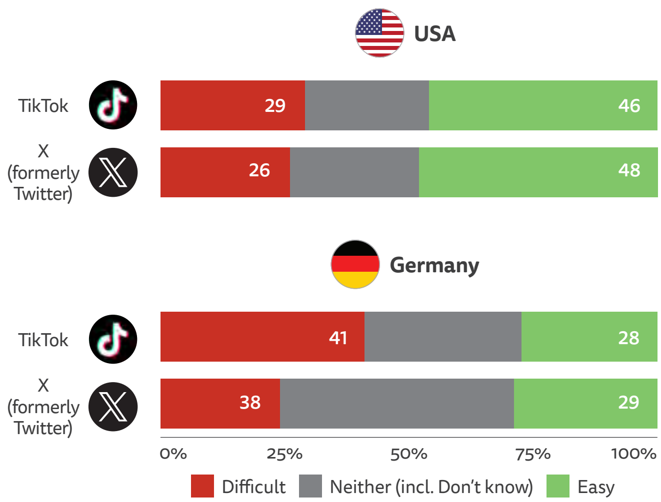
PROPORTION THAT FIND IT DIFFICULT TO IDENTIFY TRUSTWORTHY NEWS ON EACH PLATFORM - ALL MARKETS



Q6_platform_trust. Still thinking about trust, how easy or difficult is it for YOU to tell apart trustworthy versus untrustworthy news and information on each of the following platforms? *Base: All that say they use each platform, ranging from Google search = 92,185 to LinkedIn = 61,224. Note: Respondents in India and Hong Kong were not asked about TikTok.*

In exploring country differences, we find that people in Western European countries such as Germany (see the next chart) are less confident about their ability to distinguish between trustworthy and untrustworthy information on X and TikTok than respondents in the United States. This may reflect very different official and media narratives about the balance between free speech and online harms. The EU has introduced legislation such as the Digital Services Act, imposing greater obligations on platforms in the run-up to June's EU Parliament elections.[7] X is currently being investigated over suspected breaches of content moderation rules.

PROPORTION THAT FIND IT DIFFICULT TO IDENTIFY TRUSTWORTHY NEWS ON TIKTOK AND X - USA, GERMANY

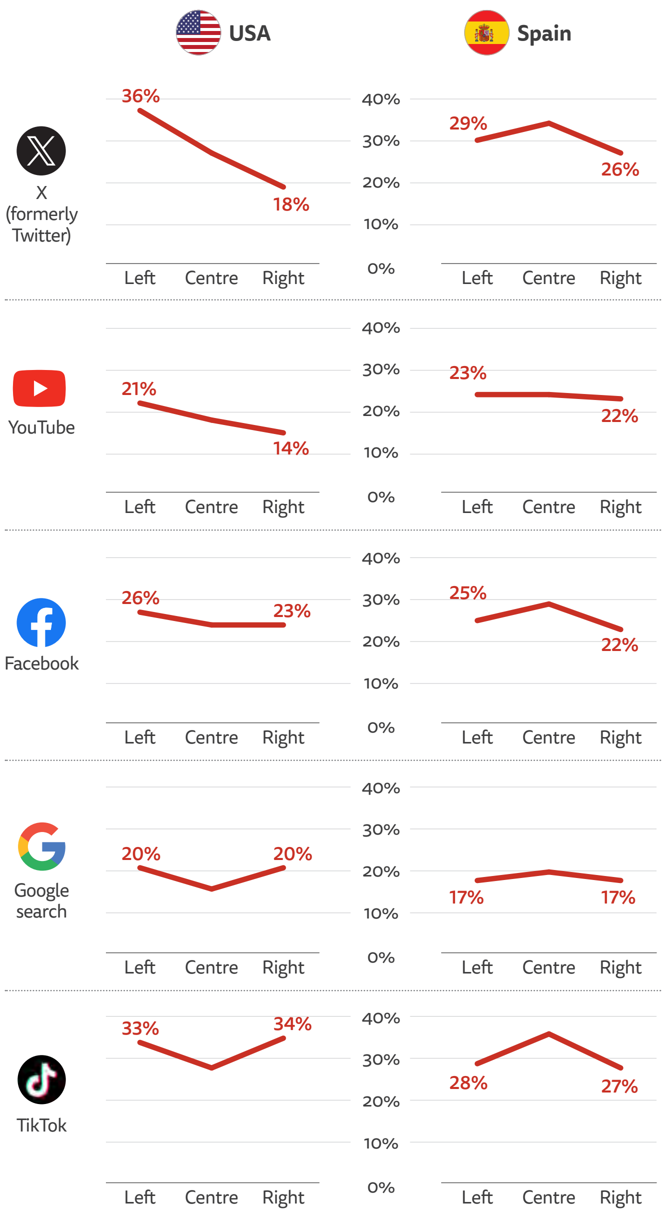


Q6_platform_trust. Still thinking about trust, how easy or difficult is it for YOU to tell apart trustworthy versus untrustworthy news and information on each of the following platforms? *Base: All those that say they use TikTok and X in USA = 1204/1269, Germany = 1105/1063.*

But even within the United States, which has lower concern generally, we find sharp differences based on political beliefs. Amid bitter debates over de-platforming, some voices on the left have been calling for more restrictions and many on the right insisting on even more free speech. We see this political split clearly in the data, especially in terms of attitudes to X and to some extent YouTube.

In our data, people on the left are much more suspicious of content they see in both networks, but other platforms are seen as mostly neutral in this regard. In no other market do we see the same level of polarisation around X, but the same broad left-right dynamics are at play, with the left more uncomfortable about the societal impact of harmful online content.

PROPORTION THAT FIND IT DIFFICULT TO TELL APART TRUSTWORTHY AND UNTRUSTWORTHY NEWS AND INFORMATION BY POLITICS - USA, SPAIN

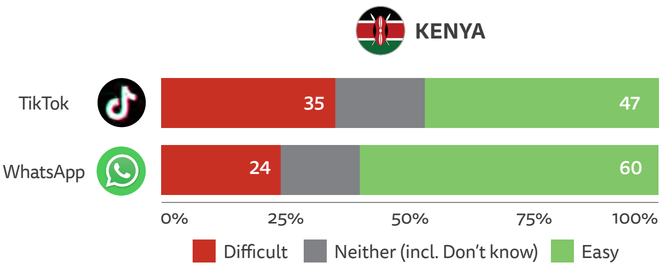


Q6_platform_trust. How easy or difficult is it for YOU to tell apart trustworthy versus untrustworthy news and information on each of the following platforms? *Base: Those on the Left/Centre/Right that use each platform in USA X = 309/583/276, YouTube = 404/807/390, YouTube = 404/807/390, Facebook = 381/776/391, Google search = 426/846/417, TikTok = 293/545/237* Spain X = 446/675/220, YouTube = 542/840/275, Facebook = 512/810/258, Google search = 591/895/296, TikTok = 437/669/220

[7] https://www.theguardian.com/media/2024/mar/26/tech-firms-poised-to-mass-hire-fact-checkers-before-eu-elections

In some African markets, such as Kenya, we see a significant difference in concern over TikTok compared with other popular networks such as X or WhatsApp, the most used network for news. The app has been labelled 'a serious threat to the cultural and religious values of Kenya' in a petition to parliament after being implicated in the sharing of adult content, misinformation, and hate speech.[8] But one other reason for TikTok's higher score may be because most content there is posted by people they don't know personally. WhatsApp posts tend to come from a close social circle, who are likely to be more trusted. Paradoxically, this could mean that information spread in WhatsApp carries more danger, because defences may be lower.

PROPORTION THAT FIND IT VERY OR SOMEWHAT DIFFICULT TO TELL APART TRUSTWORTHY AND UNTRUSTWORTHY NEWS AND INFORMATION ON TIKTOK AND WHATSAPP



Q6_platform_trust. How easy or difficult is it for YOU to tell apart trustworthy versus untrustworthy news and information on each of the following platforms? *Base: All that use each TikTok = 1930, WhatsApp = 2032.*

Fears around AI and misinformation

The last year has seen an increased incidence of so-called 'deep fakes', generated by AI including an audio recording falsely purporting to be Joe Biden asking supporters not to vote in a primary, a campaign video containing manipulated photos of Donald Trump, and artificially generated pictures of the war in the Middle East, posted by supporters of both the Palestinian and Israeli sides aimed at winning sympathy for their cause.

AI-generated (fake) pictures from the war have been widely circulated on social media

Our qualitative research suggests that, while most people do not think they have personally seen these kinds of synthetic images or videos, some younger, heavy users of social media now think they are coming across them regularly.

> ***I have seen many examples before, and they can sometimes be very good. Thankfully, they are still pretty easy to detect but within five years they will be indistinguishable.***
> *Male, 20, UK*

In the US some of our participants felt widespread use of generative AI technologies was likely to make detecting misinformation more difficult, especially around important subjects such as politics and elections; others worried about the lack of transparency and the potential for discrimination against minority groups.

> ***Having a conversation about news with an AI chatbot makes me wildly uncomfortable. Chatbots have become racist/homophobic/abusive through bad input before.***
> *Non-binary, 24, USA*

> ***AI-generated videos, pictures, and audio can easily misrepresent any person and is already being used to trick people globally.***
> *Male, 25, USA*

Others took a more balanced view, noting that these technologies could be used to provide more relevant and useful content, while also recognising the risks.

> ***It is easy, accessible and automated but people often abuse this type of technology.***
> *Female, 18, Mexico*

Journalistic uses of artificial intelligence

News organisations have reported extensively on the development and impact of AI on society, but they are also starting to adopt these technologies themselves for two key reasons. Firstly, they hope that automating behind-the-scenes processes such as transcription, copy-editing, and layout will substantially reduce costs. Secondly, AI technologies could help to personalise the content itself – making it more appealing for audiences. They need to do this without reducing audience trust, which many believe will become an increasingly critical asset in a world of abundant synthetic media.

In the last year, we have seen media companies deploying a range of AI solutions, with varying degrees of human oversight. Nordic publishers, including Schibsted, now include AI-generated 'bullet points' at the top of many of their titles' stories to increase engagement. One German publisher uses an AI robot named Klara Indernach to write more than 5% of its published stories,[9] while others have deployed tools such as Midjourney or OpenAI's Dall-E for automating graphic illustrations. Meanwhile, *Digital News Report* country pages from Indonesia, South Korea, Slovakia, Taiwan, and Mexico, amongst others, reference a range of experimental chatbots and avatars now presenting the news. Nat is one of three AI-generated news readers from Mexico's Radio Fórmula, used to deliver breaking news and analysis through its website and across social media channels.[10]

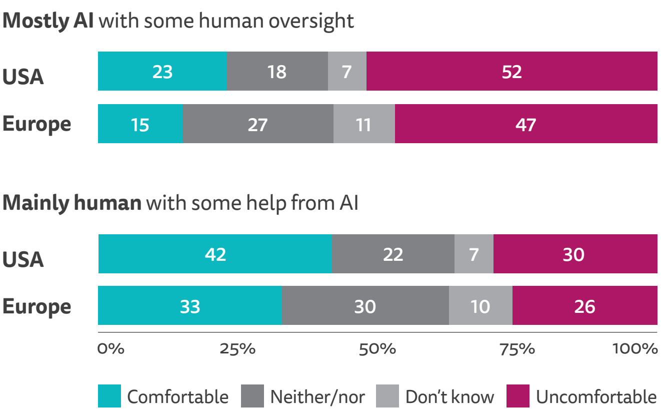
Nat, one of Radio Fórmula's AI-generated news readers

[8] https://www.semafor.com/article/04/19/2024/tiktok-fight-in-kenya
[9] https://wan-ifra.org/2023/11/ai-and-robot-writer-klara-key-todumonts-kolner-stadt-anzeiger-mediens-tech-future-as-it-switches-off-its-presses/
[10] https://www.d-id.com/resources/case-study/radioformula/

Elsewhere we find content farms increasingly using AI to rewrite news, often without permission and with no human checks in the loop. Industry concerns about copyright and about potential mistakes (some of which could be caused by so-called hallucinations) are well documented, but we know less about how audiences feel about these issues and the implications for trust overall.

Across 28 countries where we included questions, we find our survey respondents to be mostly uncomfortable with the use of AI in situations where content is created mostly by the AI with some human oversight. By contrast, there is less discomfort when AI is used to assist (human) journalists, for example in transcribing interviews or summarising materials for research. Here respondents are broadly more comfortable than uncomfortable.

PROPORTION THAT SAY THEY ARE VERY OR SOMEWHAT COMFORTABLE WITH NEWS BEING PRODUCED IN THE FOLLOWING WAYS - USA, EUROPE



Q2_AIComfortlevel_2024_1. In general, how comfortable or uncomfortable are you with using news produced in each of the following ways? *Base: Total sample in Europe = 34,351, USA = 2023. Note: Question not asked in Bulgaria, Croatia, Greece, Hungary, Romania, Slovakia, and Turkey.*

Our findings, which also show that respondents in the US are significantly more comfortable about different uses of AI than those living in Europe, may be linked to the cues people are getting from the media. British press coverage of AI, for example, has been characterised as overly negative and sensationalist,[11] and UK scores for comfort with less closely monitored use of AI are the lowest in our survey (10%). By contrast, the leading role of US companies and the opportunities for jobs and growth play a bigger part in US media narratives. Across countries, comfort levels are higher with younger groups who are some of the heaviest users of AI tools such as ChatGPT.

Our research also indicates that people who tend to trust the news in general are also more likely to be comfortable with uses of AI where humans (journalists) remain in control, compared with those that don't. We find comfort gaps ranging from 24 percentage points in the US to 10 percentage points in Mexico. Our qualitative research on AI suggests that trust will be a key issue going forward, with many participants feeling that traditional media have much to lose.

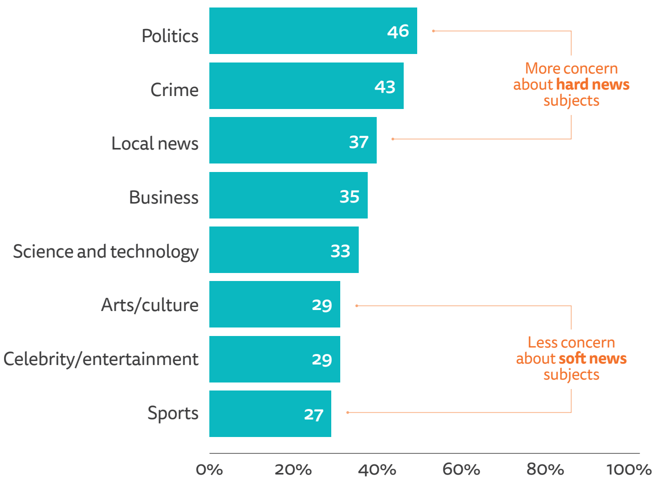
> ***If any news organisation was caught using fake images or videos in any way it should be held accountable and I'd lose trust with them, even if they were being transparent that the content was created with AI.***
> *Female, 33, USA*

Comfort with AI is also closely related to the importance and seriousness of the subject being discussed. People say they feel less comfortable with AI-generated news on topics such as politics and crime, and more comfortable with sports, arts, or entertainment news, subjects where mistakes tend to have less serious consequences and where there is potentially more value in personalisation of the content.

> ***Chatbots really shouldn't be used for more important news like war or politics as the potential misinformation could be the reason someone votes for a candidate over another one.***
> *Male, 20, UK*

While participants were generally more concerned for some topics rather than others, there were some important nuances. For example, some could see the value in using AI to automate local election stories to provide a quicker comprehensive service, as these tended to be fact-based and didn't involve the AI making political judgements.

PROPORTION THAT ARE UNCOMFORTABLE WITH USING NEWS ON THE FOLLOWING TOPICS PRODUCED MOSTLY BY AI



Q3_AIComfortlevel_2024_1/2. In general, how comfortable or uncomfortable are you with using NEWS about each of the following topics produced mostly by artificial intelligence with some human oversight? *Base: Total sample across 28 markets = 56,534. Note: Question not asked in Africa, Bulgaria, Chile, Colombia, Croatia, Greece, Hungary, Indonesia, Malaysia, Peru, Romania, Singapore, Slovakia, Taiwan, Thailand, and Turkey.*

Finally, we find that comfort levels about the different uses of AI tend to be higher with people who have read or heard more about it, even if many remain cautious. This suggests that, as people use the technology and find it *personally useful*, they may take a more balanced view of the risks and the benefits going forward.

Overall, we are still at the early stages of journalists' usage of AI, but this also makes it a time of maximum risk for news organisations. Our data suggest that audiences are still deeply ambivalent about the use of the technology, which means that publishers need to be extremely cautious about where and how they deploy it. Wider concerns about a flood of synthetic content in online platforms means that trusted brands that use the technologies responsibly could be rewarded, but get things wrong and that trust could be easily lost.

For further analysis see Section 2.2: Public Attitudes Towards the Use of AI in Journalism

[11] https://www.nature.com/articles/s41599-023-02282-w

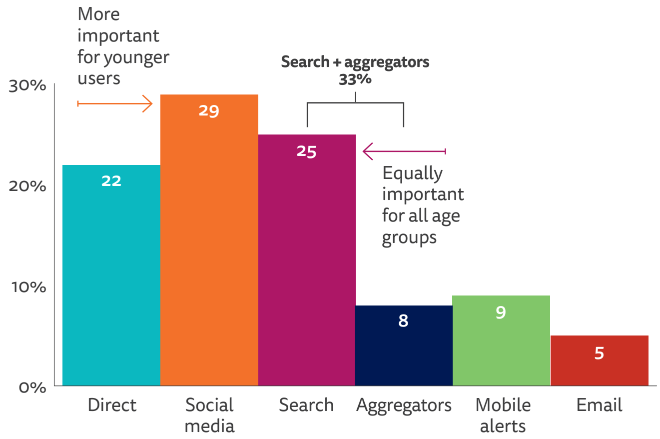
GATEWAYS TO NEWS AND THE IMPORTANCE OF SEARCH AND AGGREGATOR PORTALS

Publishers are not just concerned about falling referrals from social media but also about what might happen with search and other aggregators if chatbot interfaces take off. Google and Microsoft are both experimenting with integrating more direct answers to news queries generated by AI and a range of existing and new mobile apps are also looking to create new experiences that provide answers without requiring a click-through to a publisher.

It is important to note that across all markets, search and aggregators, taken together (33%), are a more important gateway to news than social media (29%) and direct access (22%). A large proportion of mobile alerts (9%) are also generated by aggregators and portals, adding to the concerns about what might happen next.

Unlike social media, search is seen as important across all age groups – 25% of under 35s also prefer to start news journeys with search – and because people are often actively looking for information, the resulting news journey tends to be more valuable for publishers than social fly-by traffic.

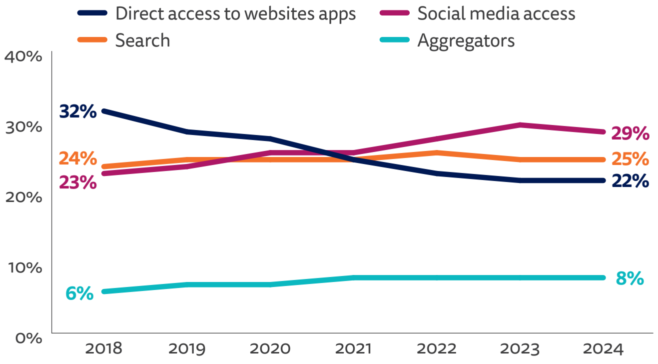
PROPORTION THAT SAY EACH IS THEIR MAIN GATEWAY TO ONLINE NEWS - ALL MARKETS



Q10a. Which of these was the main way in which you came across news in the last week? *Base: All who used online news in the last week in all markets = 86,966.*

Looking at preferred gateways over time we find that search has been remarkably consistent while direct traffic has become less important and social has grown consistently (until this year). Beneath the averages however, we do see significant differences across countries. Portals, which often incorporate search engines and mobile apps, are particularly important in parts of Asia. In Japan, Yahoo! News and Line News remain dominant, while local tech giants Naver and Daum are the key access points in South Korea – developing their own AI solutions. In the Czech Republic, Seznam has been an important local search engine, now supplemented with its own news service and also an innovator in AI. Social and video networks tend to be more important in other parts of Asia, as well as Africa and Latin America, but direct traffic still rules in a few parts of Northern Europe where intermediaries have historically played a smaller role. Publishers without regular direct access will be more vulnerable to platform changes and will inevitably find it harder to build subscription businesses.

PROPORTION THAT SAY EACH IS THEIR MAIN GATEWAY TO ONLINE NEWS (2018–2024) - ALL MARKETS



Q10a. Which of these was the main way in which you came across news in the last week? *Base: All who used online news in the last week in each market-year ≈ 2000. Note: Number of markets grew from 36 in 2018 to 47 in 2024. Markets listed in online methodology.*

PROPORTION THAT SAY EACH IS THEIR MAIN GATEWAY TO NEWS BY COUNTRY

Mostly direct

	Direct	Social	Search + Aggregators
Finland	**63%**	11%	18%
Norway	**59%**	10%	23%
Denmark	**53%**	19%	15%
Sweden	**51%**	12%	21%

Mostly social

	Direct	**Social**	Search + Aggregators
Thailand	7%	**59%**	26%
Kenya	16%	**48%**	21%
Philippines	12%	**47%**	28%
Chile	12%	**45%**	26%

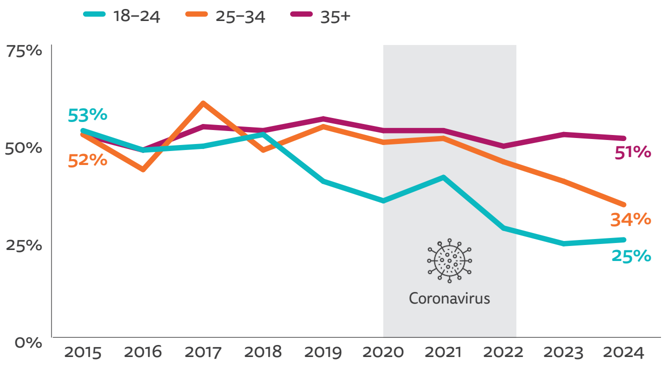
Deeply aggregated

	Direct	Social	**Search + Aggregators**
Japan	9%	8%	**70%**
South Korea	6%	17%	**67%**
Taiwan	11%	26%	**48%**
Czech Republic	25%	15%	**50%**

Q10a. Which of these was the main way in which you came across news in the last week? *Base: All who used online news in the last week in each market ≈ 2000.*

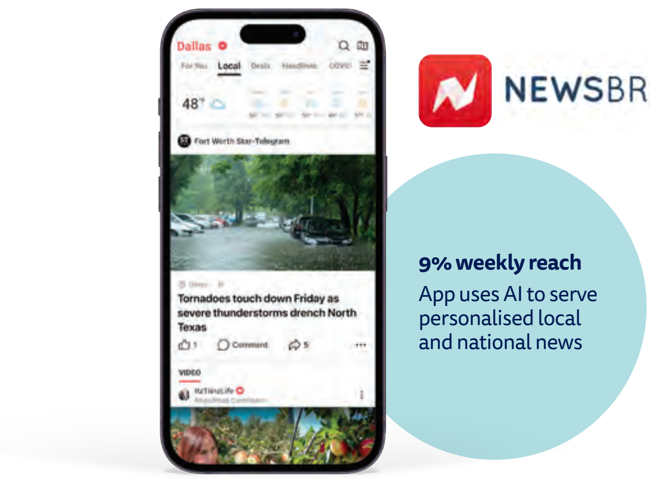
Even in countries with relatively strong brands such as the UK, we find significant generational differences when it comes to gateways. Older people are more likely to maintain direct connections, but in the last few years, especially since the COVID-19 pandemic, we have seen both 18–24s and now 25–35s becoming less likely go directly to a website or app. Across markets we see the same trends with the gap between generations just as significant as country-based differences, if not more.

PROPORTION THAT ACCESS ONLINE NEWS BY GOING DIRECT TO A NEWS WEBSITE OR APP IN THE LAST WEEK BY AGE GROUP (2015–2024) - UK



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

It is also worth noting the increasing success of mobile aggregators in some countries, many of which are increasingly powered by AI. In the United States, News Break (9%), which was founded by a Chinese tech veteran, has been growing fast with a similar market share to market leader Apple News (11%). In Asian markets, multiple aggregator apps and portals play important gateway and consumption roles, with AI features typically driving ever greater levels of personalisation.



PROPORTION THAT USED EACH NEWS AGGREGATOR IN THE LAST WEEK - SELECTED MARKETS

South Korea	Japan	Japan	Taiwan	India	Malaysia
Naver News 62%	Yahoo News 51%	Smart News 20%	Line Today 33%	Daily Hunt (English) 20%	Ohbulan! 22%

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 ≈ 2000.*

Mobile aggregators tend to be more popular with younger news consumers and are becoming a bigger part of the picture overall, partly fuelled by notifications on relevant topics. In terms of search, there is little evidence that search traffic is drying up and it is certainly not a given that consumers will rush to adopt chatbot interfaces. Even so, publishers expect traffic from search and other gateways to be more unpredictable in the future and will be exploring alternatives with some urgency.

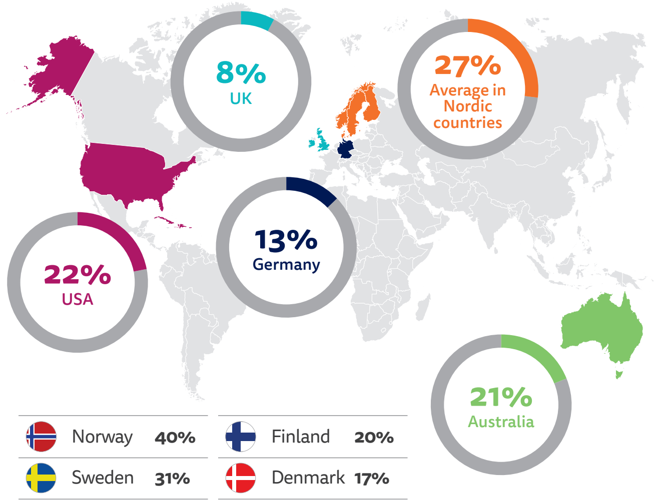
THE BUSINESS OF NEWS: SUBSCRIPTIONS STALLING?

A difficult advertising market, combined with rising costs and the decline in traffic from social media, has put more pressure on the bottom line, especially for publishers that have relied on platform distribution. These factors, together with news about US-based layoffs at the *Los Angeles Times*, *Washington Post*, NBC, Business Insider, *Wall Street Journal*, Condé Nast, and Sports Illustrated, recently led the *New Yorker* to publish an article titled: 'Is the Media Prepared for an Extinction-Level Event?'. The article argued that certain kinds of public interest journalism were now uneconomic and a new, more audience-focused approach was needed.

In this context, and with similar pressures all over the world, we are seeing news media looking to introduce or strengthen reader payment models such as subscription, membership, and donation. Paid models have been a rare bright spot in some of the richer countries in our survey, where publishers still have strong direct connections with readers, but have been difficult to make work elsewhere. As in previous years, our survey shows a significant proportion paying for online news in Norway (40%) and Sweden (31%) and over a fifth in the United States (22%) and Australia (21%), but much lower numbers in Germany (13%), France (11%), Japan (9%), and the UK (8%). There has been very little movement in these top line numbers in the last year.

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

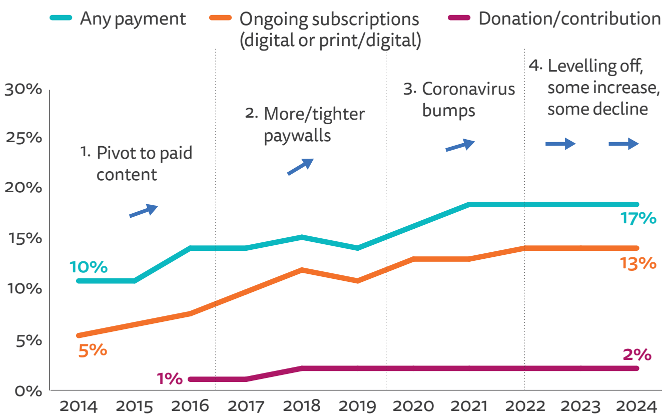
Via subscription/membership/donation or one-off payment



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 sample in each country ≈ 2000.*

Across 20 countries, where a significant number of publishers are pushing digital subscriptions, payment levels have almost doubled since 2014 from 10% to 17%, but following a significant bump during the COVID pandemic, growth has slowed. Publishers have already signed up many of those prepared to pay, and converted some of the more intermittent payers to ongoing subscriptions or donations. But amid a cost-of-living crisis, it is proving difficult to persuade most of the public to do the same.

PROPORTION THAT MADE EACH TYPE OF PAYMENT FOR ONLINE NEWS IN THE LAST YEAR (2014–2024) - AVERAGE OF SELECTED COUNTRIES

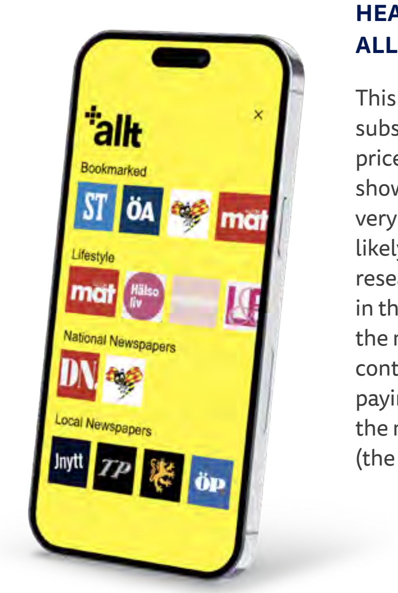


Q7a. Have you paid for online news content, or accessed a paid-for online news service, in the last year? *Base: Total sample in each country-year in Australia (2015-24), Austria (2015-24), Belgium (2016-24), Canada (2016-24), Denmark, Germany, Finland (2015-24), France, Ireland (2015-24), Italy, Japan, Netherlands (2015-24), Norway (2016-24), Poland (2015-24), Portugal (2015-24), Spain, Sweden (2016-24), Switzerland (2016-24), UK, USA ≈ 2000.*

In most countries, we continue to see a 'winner takes most' market, with a few upmarket national titles scooping up a big proportion of users. In the United States, for example, the *New York Times* recently announced that it has over 10m subscribers (including 9.9m digital only) while the *Washington Post*'s numbers have reportedly declined. Having said that, we do find a growing minority of countries where people are paying, on average, for more than one publication, including in the United States, Switzerland, Poland, and France (see table to the right).

This may be because some publishers in these markets are bundling together titles in an all-access subscription (e.g. *New York Times*, Schibsted, Amedia, Bonnier, Mediahuis). As one example, Amedia's +Alt product, which offers 100 newspapers, magazines, and podcasts, now accounts for 10% of Norwegian subscriptions, up 6 percentage points this year.

In Nordic countries, it is worth noting the high proportion of local titles being paid for online. In Canada, Ireland, and Switzerland, a significant proportion of subscriptions are going to foreign publishers.



Bonnier is bundling subscriptions in Sweden

PROFILE OF ONGOING DIGITAL NEWS SUBSCRIPTIONS - SELECTED COUNTRIES

Country *Top national titles*	% paying	Median number of subscriptions	% subscribe to local titles	% subscribe to foreign titles
Norway *VG, Aftenposten, Dagbladet*	**40**	1	45	3
Sweden *Aftonbladet, Dagens Nyheter, Svenska Dagbladet, Expressen*	**31**	1	43	7
USA *New York Times, Washington Post, Wall Street Journal*	**22**	2	20	26
Australia *The Australian, Guardian Australia, The Age, SMH, Herald Sun*	**21**	1	40	15
Finland *Helsingin Sanomat, Iltalehti Plus*	**20**	1	38	3
Denmark *Berlingske, Jyllands-Posten, Ekstrabladet, Politiken*	**17**	1	23	4
Switzerland *Tages-Anzeiger, NZZ*	**17**	2	50	21
Ireland *Irish Times, Irish Independent, Guardian, Irish Examiner*	**17**	1	4	37
Belgium *Het Laatste Nieuws, Le Soir, Het Nieuwsblad*	**15**	1	11	9
Netherlands *AD, de Volkskrant, De Telegraaf, NRC*	**15**	1	44	8
Canada *New York Times, Toronto Star, Globe and Mail*	**15**	1	10	43
Austria *Krone Pur, Kleine Zeitung, Der Standard*	**14**	1	15	11
Poland *Gazeta Wyborcza, Newsweek Polska, Fakt*	**14**	2	3	32
Germany *Bild, Die Welt, Handelsblatt, Die Zeit*	**13**	1	27	9
Spain *El País, El Mundo, La Vanguardia, El Español, El Periódico*	**12**	1	8	9
Portugal *Expresso, Público, Correio da Manhã*	**12**	1	4	6
France *Le Monde, Le Figaro, Mediapart*	**11**	2	19	13
Italy *Corriere della Sera, La Repubblica*	**10**	1	9	4
Japan *Nikkei, Asahi*	**9**	1	17	10
UK *Telegraph, Guardian, Times*	**8**	1	8	16

Q7a. Have you paid for online news content, or accessed a paid-for online news service in the last year? *Base: Total sample in each country ≈ 2000.* **Q7_SUBS_name.** *You said you have paid a subscription/membership to a digital news service in the last year … Which of the following did you subscribe to? Please select all that apply. Base: Ongoing digital news subscribers, ranging from Norway = 463 to UK = 131.*

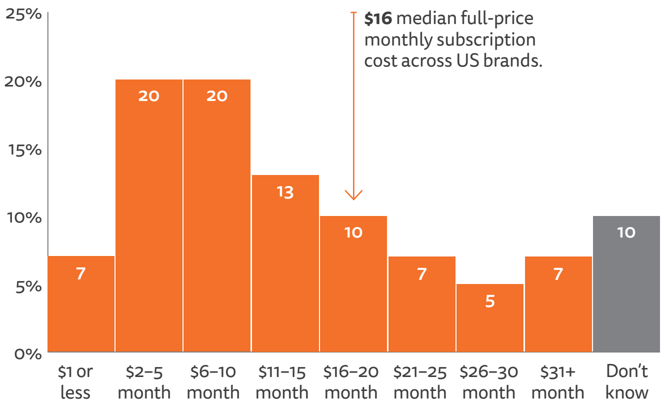
HEAVY DISCOUNTING PERSISTS IN MOST BUT NOT ALL MARKETS

This year we have looked at the price being paid for main news subscriptions in around 20 countries and compared this with the price that the main publications are charging for news. The results show that in the US and UK a large number of people are paying a very small amount (often just a few pounds or dollars), with many likely to be on low-price trials, as we found in last year's qualitative research.[12] In the next chart we find that well over half of those in the US who are paying for digital news report paying less than the median cost of a main subscription ($16), often much less. By contrast, in Norway, we see a different pattern with fewer people paying a very small amount and a larger number grouped around the median price, which in any case is much higher than in the US (the equivalent of $25).

[12] https://reutersinstitute.politics.ox.ac.uk/paying-news-price-conscious-consumers-look-value-amid-cost-living-crisis

PROPORTION OF ONGOING DIGITAL NEWS SUBSCRIBERS THAT PAY EACH AMOUNT FOR THEIR MAIN SUBSCRIPTION - USA

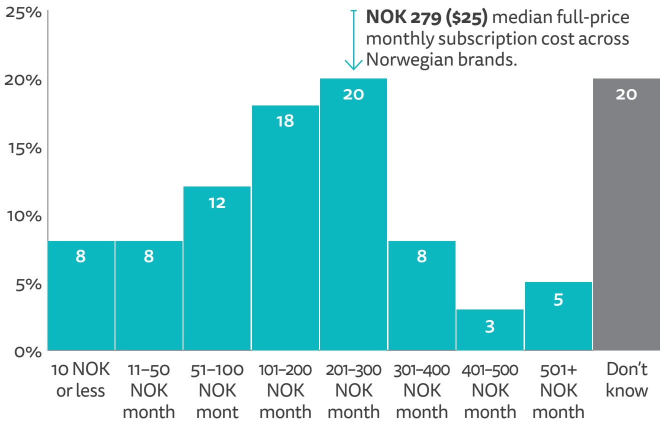
Proportion who pay an amount within each price bracket



Q1a_Pay_2024. You said that you pay for an online news subscription. How much does your MAIN online news subscription cost you per month? *Base: Ongoing digital subscribers in USA = 480.*

PROPORTION OF ONGOING DIGITAL NEWS SUBSCRIBERS THAT PAY EACH AMOUNT FOR THEIR MAIN SUBSCRIPTION - NORWAY

Proportion who pay an amount within each price bracket



Q1a_Pay_2024. You said that you pay for an online news subscription. How much does your MAIN online news subscription cost you per month? *Base: Ongoing digital subscribers in Norway = 834.*

The reasons for these differences become clearer when we compare the proportion that are paying the full sticker price for *each brand*. This allows us to estimate the proportion of subscribers in each country that are paying full price and the proportion that may be on a trial or other special deal. Using this methodology, we find significant differences between countries, with more than three-quarters (78%) in Poland paying less than full price, four in ten (46%) in the United States, but fewer in Norway (38%), Denmark (25%), and France (21%). It is not only the case that more people pay for digital news in the Nordic countries. It is also the case that fewer of them are paying a heavily discounted rate, and in Norway the median price is much higher than in other rich countries such as France, the UK, and the US.

HOW MUCH DO PEOPLE PAY FOR THEIR MAIN ONGOING DIGITAL SUBSCRIPTION? - SELECTED COUNTRIES

Country	Proportion paying less than full price for their subscription	Median cross-brand monthly price	Median price $USD
Poland	78%	36.5zł	$9
USA	46%	$16 USD	$16
UK	41%	£11.50	$14.50
Norway	38%	279 NOK	$25.50
Denmark	25%	DKK 99	$14
France	21%	€ 12	$13

Q7_SUBS_name. You said you have paid a subscription/membership to a digital news service in the last year … Which of the following did you subscribe to? Please select all that apply. **Q1a_Pay_2024.** You said that you pay for an online news subscription. How much does your main online news subscription cost you per month? *Base: Ongoing digital news subscribers, ranging from Norway = 463 to UK = 131. Note: Figures reflect what people say they pay for their online news subscription compared to the full asking price for that subscription. E.g. If a person says they are paying £10/pm for their subscription, but the full advertised price is actually £15/pm, they are considered as paying less than the full price. Prices accurate as of March/April 2024. 'Median monthly price across news brands' reflects the median price of standard online news subscriptions (non-trial, non-discount) across all major news subscription providers in the country. The median price balances between high-cost premium titles and lower cost 'freemium' offers, which can skew averages.*

For further analysis see Section 2.4: How Much do People Pay for Online News? And What Might Encourage More People to Pay?

We also asked those not currently paying, what might be a fair price, if anything? Across markets just 2% of non-payers say they would pay the equivalent of an average full price subscription, with 55% saying they wouldn't be prepared to pay anything. That last number is a bit lower in Norway (45%) but considerably higher in the UK (69%) and Germany (68%). In a few markets in the Global South, such as Brazil, we do find more willingness to pay something, but it rarely amounts to more than the equivalent of a few US dollars.

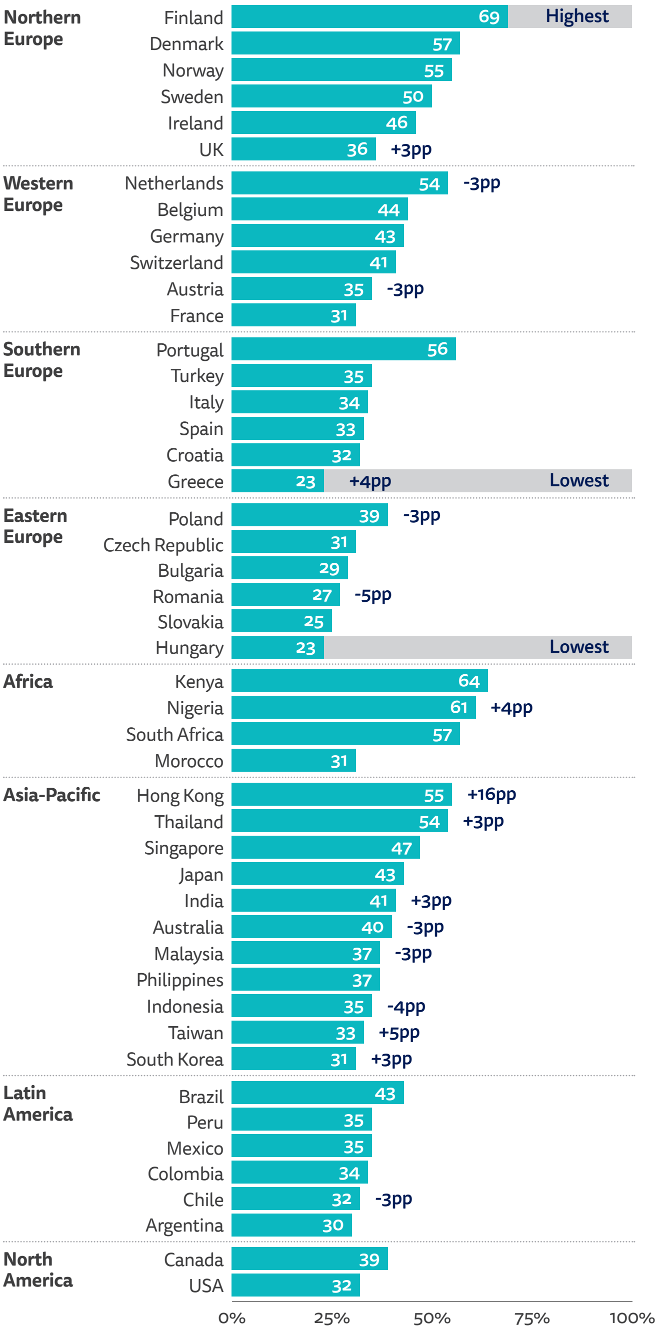
Not every publisher can expect to make reader revenue work, in large part because much of the public basically does not believe news is worth paying for, and continues to have access to plenty of free options from both commercial, non-profit, and, in some countries, public service providers. But for others, building digital subscriptions based on distinctive content is the main hope for a sustainable future. Discounting is an important part of persuading new customers to sample the product but publishers will hope that over time, once the habit is created, they can increase prices. It is likely to be a long and difficult road with few winners and many casualties along the way.

TRUST LEVELS STABLE – HAVE WE REACHED THE BOTTOM?

There is little evidence that upcoming elections or the increased prevalence of generative AI has so far had any material impact on trust in the news. Across markets, around four in ten (40%) say they trust most news most of the time, the same score as last year. Finland remains the country with the highest levels of trust (69%), Greece and Hungary (23%) have the lowest levels. Morocco, which was included in the survey for the first time, has a relatively low trust rating (31%), compared with countries elsewhere in Africa, a reflection perhaps of the fact that media control is largely in the hands of political and business elites.

Low trust scores in some other countries such as the US (32%), Argentina (30%), and France (31%) can be partly linked to high levels of polarisation and divisive debates over politics and culture.

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



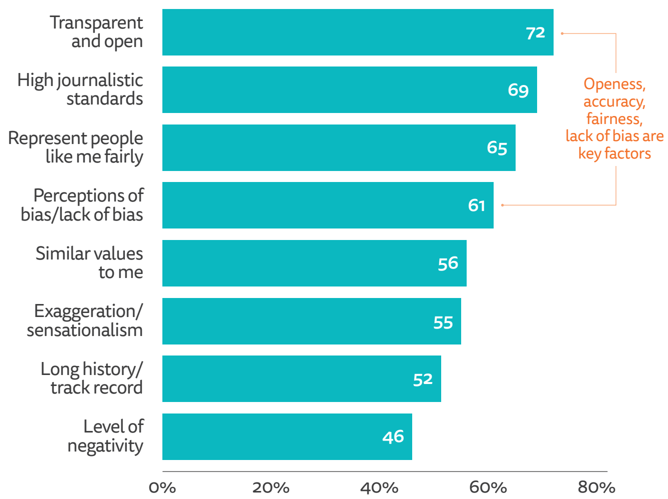
Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statements? I think you can trust most news most of the time. *Base: Total sample in each market ≈ 2000.*

As always, it is important to underline that our data are based on people's perceptions of how trustworthy the media, or individual news brands, are. These scores are aggregates of subjective opinions, not an objective measure of underlying trustworthiness, and as our previous work has shown, any year-on-year changes are often at least as much about political and social factors as narrowly about the news itself.[13]

This year, we have also been exploring the key factors driving trust or lack of trust in the news media. We find high standards, a transparent approach, lack of bias, and fairness in terms of media representation are the four primary factors that influence trust. The top responses are strongly linked and are consistent across countries, ages, and political viewpoints. An overly negative or critical approach, which is much discussed by politicians when critiquing the media, is seen as the least important reason in our list, suggesting that audiences still expect journalists to ask the difficult questions.

These results may give a clear steer to media companies on how to build greater trust. Most of the public want news to be accurate, fair, avoid sensationalism, be open about any agendas and biases including lack of diversity, own up to mistakes – and not pull punches when investigating the rich and powerful. People do not necessarily agree on what this looks like in practice, or which individual brands deliver on it. But what they hope news will offer is remarkably similar across many different groups.

PROPORTION THAT SAY EACH IS VERY OR SOMEWHAT IMPORTANT WHEN DECIDING WHAT NEWS OUTLETS TO TRUST - ALL MARKETS



TRUST_REASON_2024. Still thinking about trust in news ... how important or unimportant are the following to you when it comes to deciding which news outlets to trust? *Base: Total sample in all markets = 94,943.*

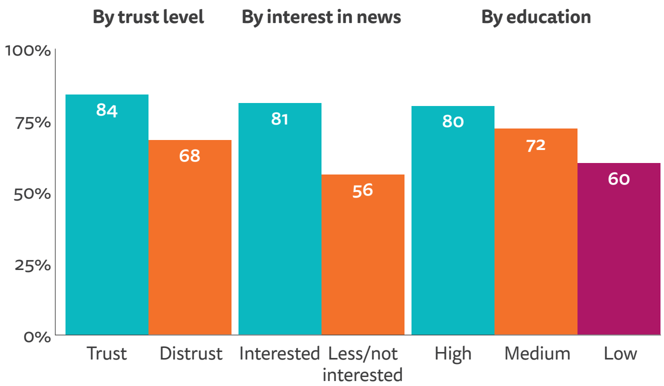
For further analysis see Section 2.1: Public Perspectives on Trust in News

Audience interest in transparency and openness seems to chime with some of the ideas behind recent industry initiatives, such as the Trust Project, a non-profit initiative that encourages publishers to reveal more of their workings using so-called 'trust indicators', the Journalism Trust Initiative orchestrated by Reporters without Borders, and others. Some large news organisations, such as the BBC, have gone further, creating units or sub-brands that answer audience questions or aim to explain how the news is checked. BBC Verify, launched in May 2023 aims to show and share work behind the scenes to check and verify information, especially images and video content in an era where misinformation has been growing. 'People want to know not just what we know (and don't know), but how we know it,' says BBC News CEO Deborah Turness. Leaving aside the risk that journalists and members of the public often mean different things when talking about transparency, with the former focusing on

[13] https://reutersinstitute.politics.ox.ac.uk/trust-news-project

reporting practices, the latter often on their suspicion that ulterior commercial and/or political motives are at play, our data suggest that these initiatives may not work for all audiences. Transparency is considered most important amongst those who already trust the news (84%), but much less for those are generally distrustful (68%) where there is a risk that it hardens the position of those already suspicious of a brand, if they feel that verification will not be equally applied to both sides of an argument.[14] Those that are less interested in the news are also less likely to feel that being transparent about how the news is made is important.

PROPORTION THAT SAY TRANSPARENCY IS VERY OR SOMEWHAT IMPORTANT WHEN DECIDING WHAT NEWS OUTLETS TO TRUST BY TRUST LEVEL, INTEREST IN NEWS, AND EDUCATION - ALL MARKETS



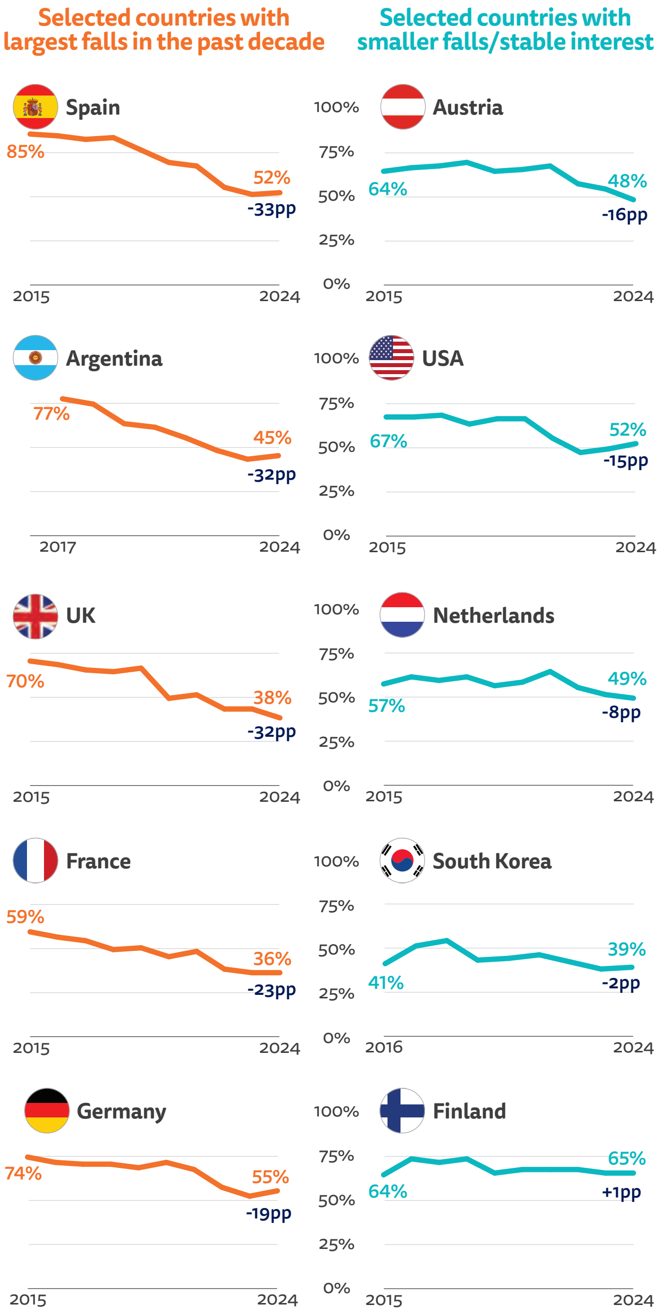
TRUST_REASON_2024. Still thinking about trust in news … how important or unimportant are the following to you when it comes to deciding which news outlets to trust? – Whether they are transparent about how the news is made. *Base: All that trust/distrust news = 38,459/26,671, interested/less or not interested in news = 44,627/13,024, high/medium/low education = 35,546/41,631/17,766.*

ATTENTION LOSS, NEWS AVOIDANCE, AND NEWS FATIGUE

For several years we have pointed to a number of measures that suggest growing ambivalence about the news, despite – or perhaps because of – the uncertain and chaotic times in which we live. Interest in news continues to fall in some markets, but has stabilised or increased in others, especially those like Argentina and the United States that are going through or have recently held elections.

The long-term trend, however, is down in every country apart from Finland, with high interest halving in some countries over the last decade (UK 70% in 2015; 38% in 2024). Women and young people make up a significant proportion of that decline.

PROPORTION EXTREMELY OR VERY INTERESTED IN NEWS (2015–2024)



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

[14] https://europeanconservative.com/articles/commentary/whos-verifying-bbc-verify/

While news interest may have stabilised a bit this year, the proportion that say they selectively avoid the news (sometimes or often) is up by 3pp this year to 39% – a full 10pp higher than it was in 2017. Notable country-based rises this year include Ireland (+10pp), Spain (+8pp), Italy (+7pp), Germany (+5pp), Finland (+5pp), the United States (+5pp), and Denmark (+4pp). The underlying reasons for this have not changed. Selective news avoiders say the news media are often repetitive and boring. Some tell us that the negative nature of the news itself makes them feel anxious and powerless.

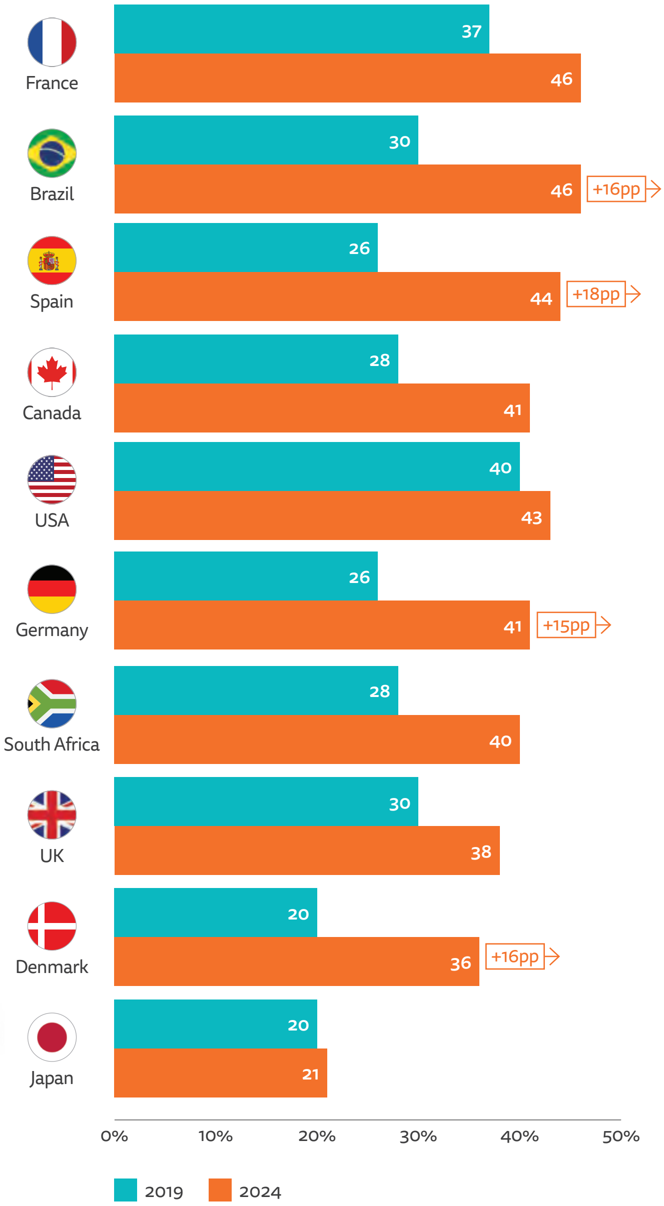
SELECTED NEWS AVOIDANCE AT HIGHEST LEVELS RECORDED - ALL MARKETS

World news is far too depressing at the moment with most news channels reporting on the same things.
Female, 45, UK

Q1di_2017. Do you find yourself actively trying to avoid news these days? *Base: Total sample in each country-year ≈ 2000. Note: Number of markets grew from 36 in 2017 to 47 in 2024. Markets listed in online methodology.*

But it is not just that the news can be depressing, it is also relentless. Across markets, the same proportion, around four in ten (39%) say they feel 'worn out' by the amount of news these days, up from 28% in 2019, frequently mentioning the way that coverage of wars, disasters, and politics was squeezing out other things. The increase has been greater in Spain (+18), Denmark (+16pp), Brazil (+16pp), Germany (+15pp), South Africa (+12pp), France (+9pp), and the United Kingdom (+8pp), but a little less in the United States (+3pp) where news fatigue was a bigger factor five years ago. There are no significant differences by age or education, though women (43%) are much more likely to complain about news overload than men (34%).

PROPORTION THAT SAY THEY FEEL WORN OUT BY THE AMOUNT OF NEWS (2019 AND 2024) - SELECTED COUNTRIES



Q1e_2019. Please indicate your level of agreement with the following statement. – I am worn out by the amount of news there is these days. *Base: Total sample in each country-year ≈ 2000.*

Since we started tracking these issues, usage of smartphones has increased, as has the number of notifications sent from apps of all kinds, perhaps contributing to the sense that the news has become hard to escape. Platforms that require volume of content to feed their algorithms are potentially another factor driving these increases. It was notable that in our industry survey, at the start of 2024, most publishers said they were planning to produce more videos, more podcasts, and more newsletters this year.[15]

The sheer volume of information is overwhelming. We can be left feeling helpless in the face of another remote disaster, leaving you feeling guilty and impotent.
Male, 71, UK

There's too much news nowadays ... some are fake and some are real, but I get confused and get a headache.
Male, 27, USA

[15] https://reutersinstitute.politics.ox.ac.uk/journalism-media-and-technology-trends-and-predictions-2024

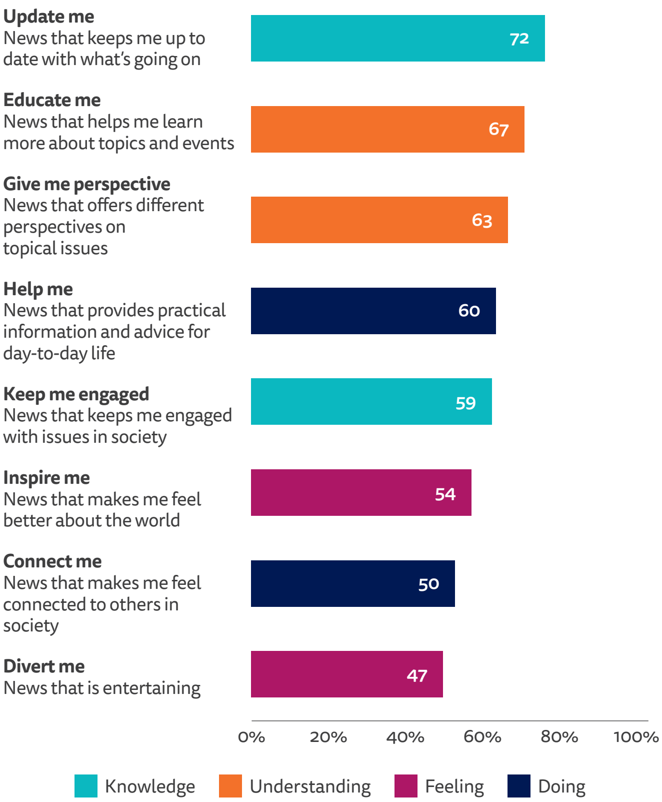
USER NEEDS AND INFORMATION GAPS

Industry leaders recognise the twin challenges of news fatigue and news avoidance, especially around long-running stories such as the wars in Ukraine and Gaza. At the same time, disillusion with politics in general may be contributing to declining interest, especially with younger news consumers, as previous reports have shown. Editors are looking for new ways to cover these important stories, by making the news more accessible and engaging – as well as broadening the news agenda but without 'dumbing down'.

One way in which publishers have been trying to square this circle has been through a 'user needs' model, where stories that update people about the latest news are supplemented by commissioning more that educate, inspire, provide perspective, connect, or entertain.

Originally based on audience research at the BBC, the model has been implemented by a number of news organisations around the world. In our survey this year, we asked about eight different needs included in User Needs 2.0, which are nested in four basic needs of knowledge, understanding, feeling, and doing.[16] Our findings show that the three most important user needs globally are *staying up to date* ('update me'), *learning more* ('educate me'), and *gaining varied perspectives* ('give me perspective'). This is pretty consistent across different demographic groups, although the young are a bit more interested in stories that inspire, connect, and entertain when compared with older groups. In the United States, for example, over half (52%) of under 35s think having stories that make them feel better about the world is very or extremely important, compared with around four in ten (43%) of over 35s.

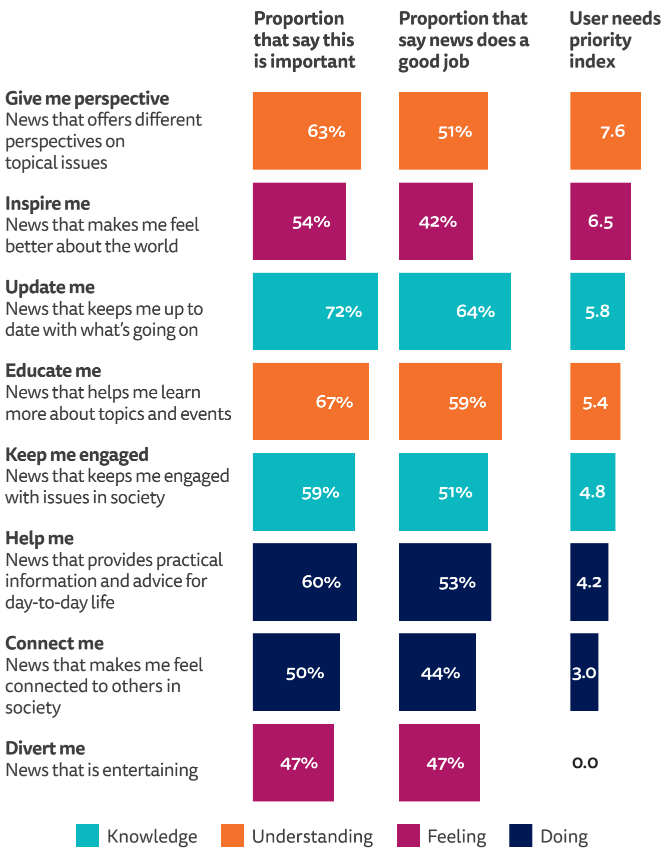
PROPORTION THAT SAID EACH USER NEED IS VERY OR SOMEWHAT IMPORTANT TO THEM - ALL MARKETS



Q1_Needs_2024. Thinking about the role that news plays in your life, how important or unimportant are each of the following. *Base: Total sample in all markets = 94,943.*

We also asked about how good the media were perceived to be at satisfying each user need. By combining these data with the data on importance, we can create what we call a User Needs Priority Index. This is a form of gap analysis, whereby we take the percentage point gap between the proportion that think a particular need is important and the proportion that think the news media do a good job of providing it and multiply this by the overall importance (as a decimal) to identify the *most important gaps*. Audiences say, for example, that updating is the most important need, but also think that the media do a good job in this area already. By contrast, there is a much bigger gap in providing different perspectives (e.g. more context, wider set of views) and also around news that 'makes me feel better about the world' (offers more hope and optimism).

USER NEEDS PRIORITY INDEX - ALL MARKETS



Q1_Needs_2024. Thinking about the role that news plays in your life, how important or unimportant are each of the following? **Q2_Needs_2024.** In your opinion how good or bad is the news media at providing you with each of the following? *Base: Total sample in all markets = 94,943. Note: User Needs Priority Index is the percentage point gap between the proportion that think a particular need is important and the proportion that think the news media does a good job of providing it multiplied by importance as a decimal.*

News organisations may draw different conclusions from these data, depending on their own mission and target audience, but taken as a whole, it is clear news consumers would prefer to dial down the constant updating of news, while dialling up context and wider perspectives that help people better understand the world around them. Most people don't want the news to be made more entertaining, but they do want more stories that provide more personal utility, help them connect with others, and give people a sense of hope.

For further analysis see Section 2.3: More than 'Just the Facts': How News Audiences Think about 'User Needs'

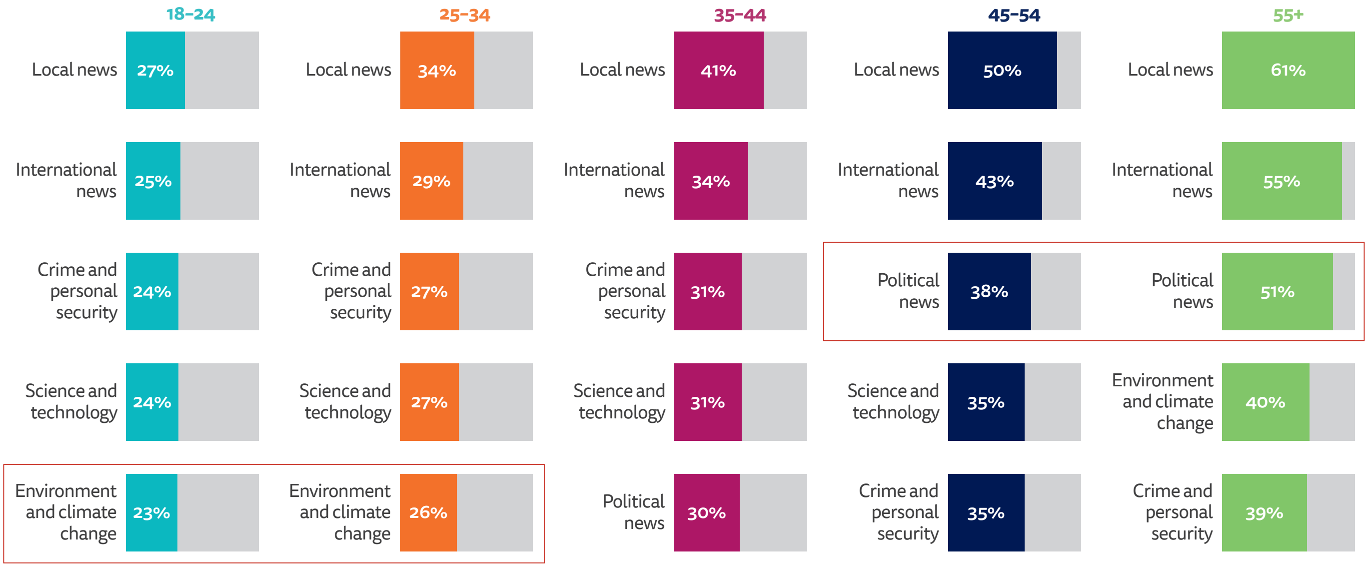
[16] https://smartocto.com/research/userneeds/

AGENDA AND TOPIC GAPS

Adopting a user needs model is one way to address some of the issues that lie behind selective news avoidance and low engagement, but a topic-based lens may also be useful. When looking at levels of interest in different subject areas by age, we find commonalities but also some stark differences. For all age groups, local and international news are considered the most important topics, but there is less consensus around political news. This doesn't feature in the top five for under-35s but it is a very different story for over-45s where politics remains firmly in the top three. Younger groups are more interested in the environment and climate change, as well as other subjects such as wellness, which are less of a priority for older groups.

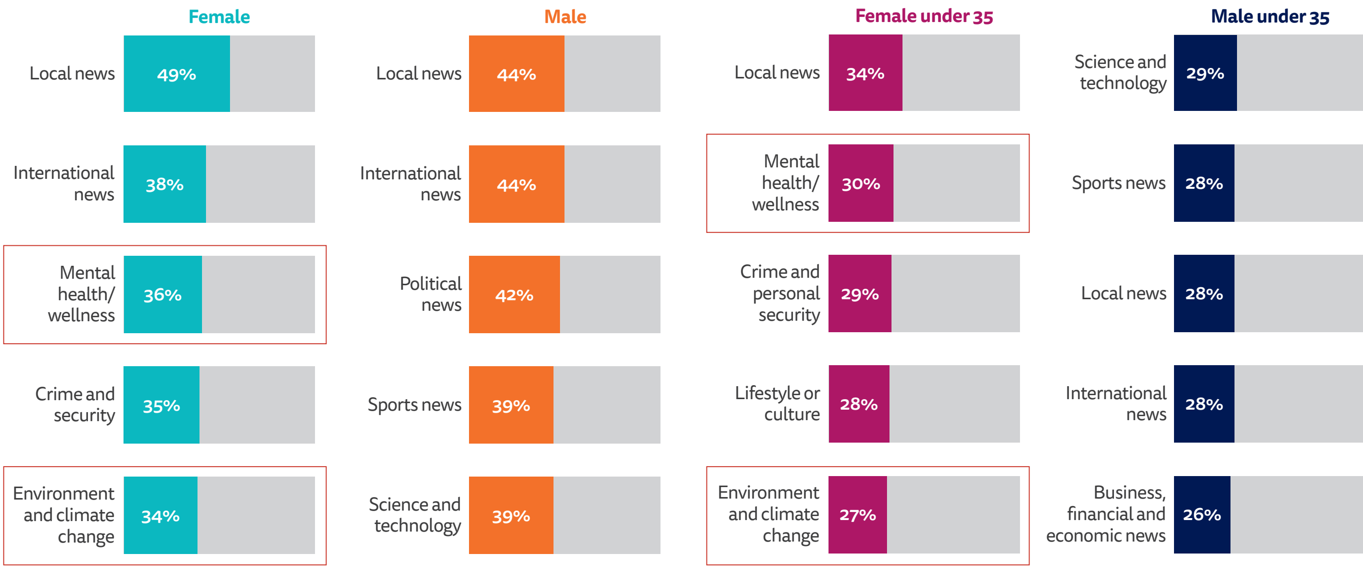
If anything, we find even bigger gaps around gender, with men more interested in politics and sport; women more interested in health/wellness and the environment. Much of this is not new but a reminder that older, male-dominated newsrooms may not always be instinctively in tune with the needs of those who don't look or think like them.

PROPORTION THAT SAY THEY ARE INTERESTED IN EACH NEWS TOPIC BY AGE GROUP - 43 MARKETS



Q1d_2022. Which of the following types of news, if any, are you interested in? Please select all that apply. *Base: 18-24/25-34/35-44/45-54/55+ in 43 markets = 9398/14,936/15,356/14,942/32,188. Note: Question not asked in Chile, Mexico, Kenya, Nigeria.*

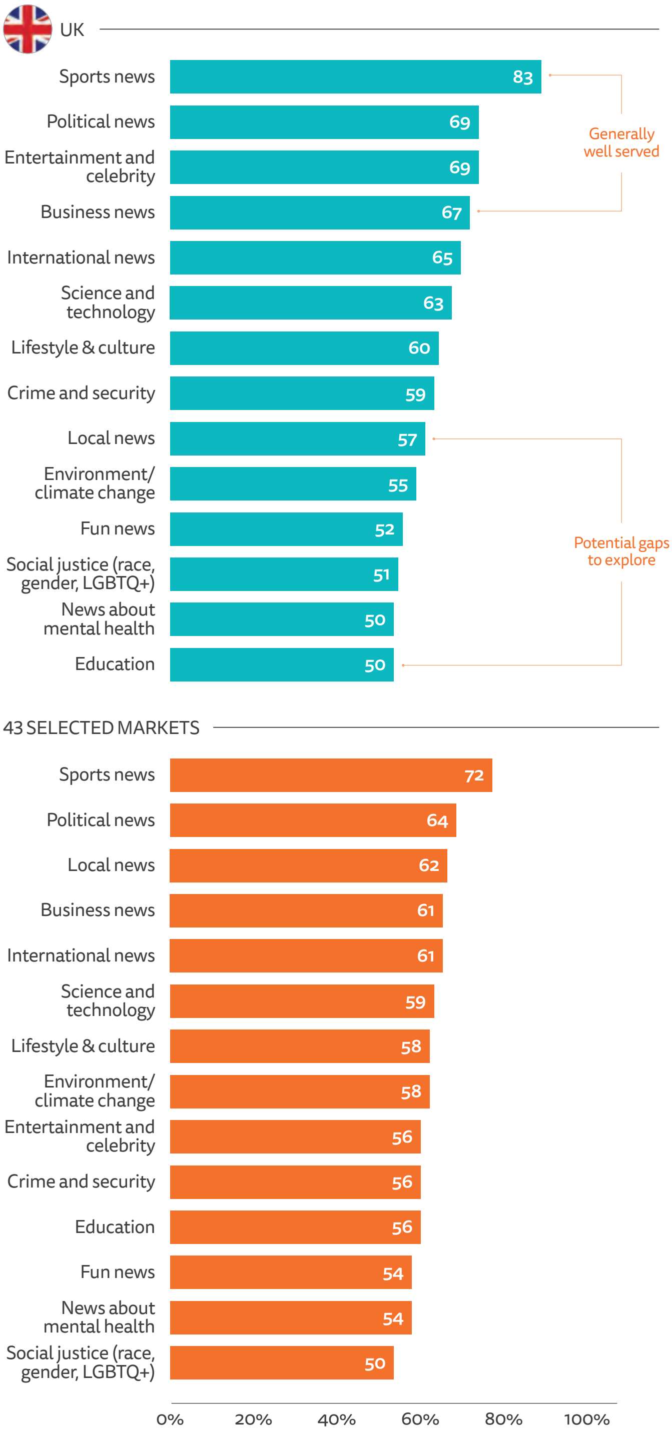
PROPORTION THAT SAY THEY ARE INTERESTED IN EACH NEWS TOPIC BY AGE-GENDER GROUP - SELECTED MARKETS



Q1d_2022. Which of the following types of news, if any, are you interested in? Please select all that apply. *Base: Female/male/Female U35/Male U35 in selected markets = 44,274/44,535/11,956/12,378. Note: Question not asked in Chile, Mexico, Kenya, Nigeria.*

Beyond interest, we also asked respondents to what extent, if at all, they felt their information needs are being met around each of these topics. Across countries we find that most people feel their needs around sport and politics (and often celebrity news) are well served, while there are substantial gaps in some other areas such education, environment, mental health, and social justice.

PROPORTION INTERESTED IN EACH TOPIC THAT SAY THEIR INFORMATION NEEDS ARE BEING MET - UK, SELECTED MARKETS

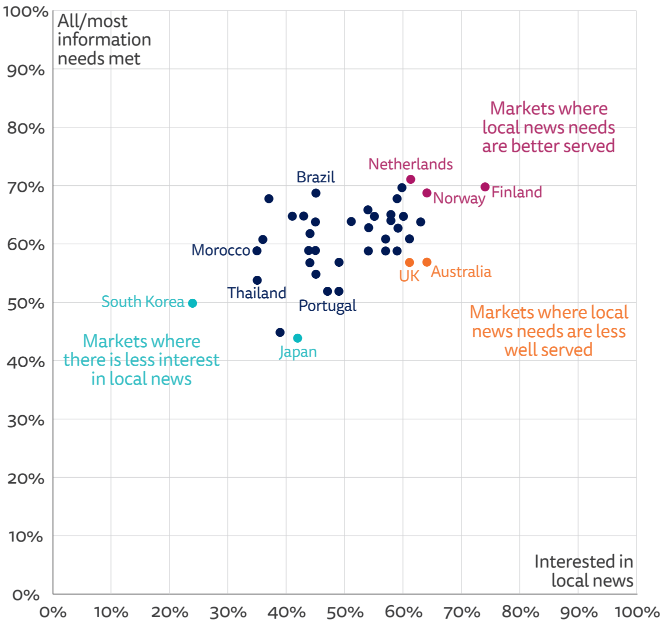


Q1d_2022. Which of the following types of news, if any, are you interested in? Please select all that apply. **Q_Needs_3_2024.** In your experience, how much of the information you need, if any, is available to access on each of the following topics? *Base: All interested in each topic in UK ranges from 460 to 816, selected markets ranges from: 22,000 to 44,000. Note: Question not asked in Chile, Mexico, Kenya, Nigeria.*

Local news is a mixed bag. In some countries, including the United States, more than two-thirds (68%) feel that most or all of their needs are being met, despite the loss of many local newspaper titles and journalist jobs over the past decade. Our data suggest that in most countries much of the public does not share the view that there is a crisis of local news – or at least that much of the information they value is being provided by other community actors accessed via search engines or social media.

But in a few countries, notably the UK and Australia, only a little over half say their needs are being met, suggesting that in these countries at least, local news needs are being significantly underserved. These are also countries where local publishers have taken a disproportionate share of job cuts. In countries such as Portugal, Bulgaria, and Japan a higher proportion of unmet needs are largely down to lower interest in local news overall, leaving aside the important role that local news can play in supporting democracy.

PROPORTION THAT SAY LOCAL INFORMATION NEEDS ARE BEING MET PLOTTED AGAINST INTEREST IN LOCAL NEWS - SELECTED MARKETS



Q1d_2022. Which of the following types of news, if any, are you interested in? *Base: Total sample in each market ≈ 2000.* **Q_Needs_3_2024.** In your experience, how much of the information you need, if any, is available to access on local news? *Base: All interested in local news in each market, ranging from South Korea = 478 to Finland = 1493. Note: Question not asked in Chile, Mexico, Kenya, Nigeria.*

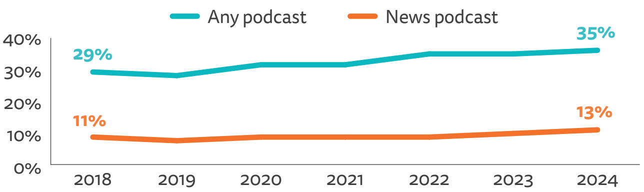
Overall, we find clear differences in terms of subject preferences by age and gender which help explain why some groups are engaging less with the news or avoiding it altogether. There is no one-size-fits-all answer to these issues but improving coverage of subjects with higher interest that are currently underserved would be a good starting point.

NEW FORMATS AND THE ROLE OF AUDIO

Publishers are also exploring different formats as a way of addressing the engagement challenge, especially those that are less immediately reliant on platform algorithms, such as podcasts.

In the last few years, leading publishers such as the *New York Times* and Schibsted have joined public broadcasters in trying to build their own platforms for distribution to compete with giants like Spotify, using exclusive content or windowing strategies to drive direct traffic. Legacy print publishers have been ramping up their podcast production, finding the combination of text and audio a good fit for specialist journalistic beats, and relatively low cost compared with video. In countries such as the United Kingdom, a strong independent sector is emerging with a range of new launches for politics and economic shows this year, as well as US spin-offs for popular daily podcasts such as the News Agents. Many of the most popular podcasts are now filmed and distributed via video platforms such as YouTube, further blurring the lines between podcasts and video. Across 20 countries where we have been measuring podcast consumption since 2018, just over a third (35%) have accessed one or more podcasts in the last month, but only just over one in ten (13%) regularly use a news one. The share of podcast listening for news shows has remained roughly the same as it was seven years ago.

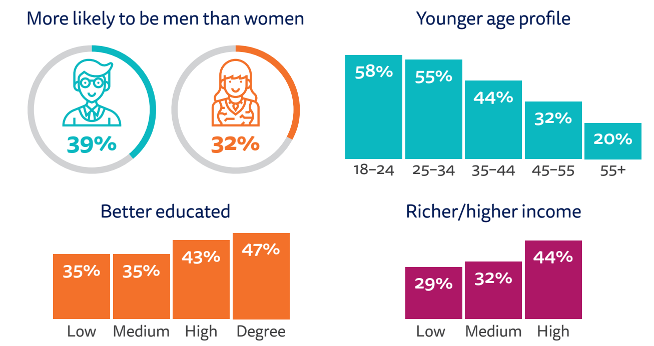
PROPORTION THAT USED A PODCAST IN THE LAST MONTH (2018–2024) - SELECTED COUNTRIES



Q11F. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? *Base Total sample in each country-year ≈ 2000. Note: Data from UK, USA, Germany, France, Italy, Spain, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Japan, Australia, Canada, Argentina, Singapore (2018-23).*

Podcasts continue to attract younger, richer, and better educated audiences, with news and politics shows heavily skewed towards men, partly due to the dominance of male hosts, as we reported last year. Many markets have become saturated with content, making it hard for new shows to be discovered and also for existing shows to grow audiences.

PROFILE OF PODCAST USERS



Q11F. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Please select all that apply. *Base: Those who listened to any podcast in the last month in 19 selected countries. Male = 18,775, Female = 19,637, 18-24 = 3695, 25-34 = 6235, 35-44 = 6241, 45-54 = 6413, 55+ = 15,827; Low income = 8097, Medium income =16,287, High income = 9344; Low education = 8363, Medium education = 16,287, High education = 13,762, Degree = 10, 396.*

CONCLUSIONS

Our report this year sees news publishers caught in the midst of another set of far-reaching technological and behavioural changes, adding to the pressures on sustainable journalism. But it's not just news media. The giants of the tech world such as Meta and Google are themselves facing disruption from rivals like Microsoft as well as more agile AI-driven challengers and are looking to maintain their position. In the process, they are changing the way their products work at some pace, with knock-on impacts for an increasingly delicate news ecosystem.

Some kind of platform reset is underway with more emphasis on keeping traffic within their environments and with greater focus on formats proven to drive engagement, such as video. Many newer platforms with younger user bases are far less centred on text and links than incumbent platforms, with content shaped by a multitude of (sometimes hugely popular) creators rather than by established publishers. In some cases, news is being excluded or downgraded because technology companies think it causes more trouble than it is worth. Traffic from social media and search is likely to become more unpredictable over time, but getting off the algorithmic treadmill won't be easy.

While some media companies continue to perform well in this challenging environment, many others are struggling to convince people that their news is worth paying attention to, let alone paying for. Interest in the news has been falling, the proportion avoiding it has increased, trust remains low, and many consumers are feeling increasingly overwhelmed and confused by the amount of news. Artificial intelligence may make this situation worse, by creating a flood of low-quality content and synthetic media of dubious provenance.

But these shifts also offer a measure of hope that some publishers can establish a stronger position. If news brands are able to show that their journalism is built on accuracy, fairness, and transparency – and that humans remain in control – audiences are more likely to respond positively. Re-engaging audiences will also require publishers to rethink some of the ways that journalism has been practised in the past; to find ways to be more accessible without dumbing down; to report the world as it is whilst also giving hope; to give people different perspectives without turning it into an argument. In a world of superabundant content, success is also likely to be rooted in standing out from the crowd, to be a destination for something that the algorithm and the AI can't provide while remaining discoverable via many different platforms. Do all that and there is at least a possibility that more people, including some younger ones, will increasingly value and trust news brands once again.

SECTION 2

SECTION 2

Further Analysis and International Comparison

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2.1 Public Perspectives on Trust in News

Rasmus Kleis Nielsen and **Richard Fletcher**

Almost all news reporting implicitly asks the public to trust it. At a basic level, it asks people to trust that 'we really did talk to the sources we mention, they really said what we have quoted them on, and the data we cite is reliable'. And in a more expansive sense, 'our editorial judgement on what to cover, who to talk to, and what data to rely on is sound, so is our presentation of what we found, and our motivations'.

But across the world, much of the public does not trust most news most of the time. While there is significant variation from country to country and from brand to brand, in this year's report, just 40% of our respondents across all 47 markets say they trust most news.

Public trust is not the same as trustworthiness. Sometimes people trust individuals and institutions that are not, in fact, trustworthy. Sometimes they do not trust – or even distrust – those that they might, on closer inspection, see are trustworthy (or that journalists or others think they ought to see as trustworthy).

But whether well-founded or not, trust in news is, from the perspective of journalists and news media who face an often sceptical public, what sociologists call a 'social fact', famously defined as 'manners of acting, thinking and feeling external to the individual, which are invested with a coercive power by virtue of which they exercise control' (Durkheim 1982: 52).

This means that trust, both at the brand level and at the general level, influences the role news can and does play in society. Journalists and media organisations have both pragmatic reasons to care – 'trust can be a key to unlocking user revenue' as Agnes Stenbom, the head of IN/LAB at Schibsted puts it[17] – and more principled reasons to care, as years of research has documented how people who trust the news less are less likely to believe in the information it presents and learn from it (see Altay et al. 2023 for an overview).

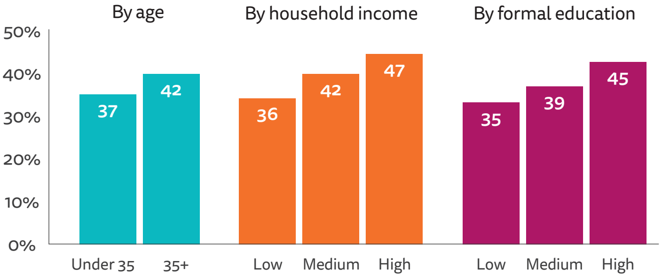
Individual reporters and editors will not necessarily agree with – let alone like – how they, their colleagues, and their competitors are seen by members of the public. And trust is not, in itself, a measure of the value of what journalists do, just as earning it is not always the most important thing journalists can or should aspire to. But public perceptions of trust are important in themselves. In people's relations with journalism and the news media, as in their relations with politics and much else, perception is a consequential part of reality.

MUCH OF THE PUBLIC HAS A SIMILAR VIEW ON TRUST IN NEWS MEDIA

Because we know that many journalists and editors care whether people trust the news or not, we have long tracked this at a general level by asking people whether they feel they can trust most news most of the time. While there is significant variation by country – and in some countries significant variation by, for example, political orientation – overall trust in news in many cases varies less by gender, age, income, and education (as well as by political orientation, as we will discuss in more detail in the last part of this chapter) than one might assume.

Generally, younger people, people with low income, and people with lower levels of formal education tend to trust the news less. These are also groups that are often less well served by the news media, and generally less likely to think that the media cover people like them fairly, as we showed in our 2021 *Digital News Report.*

PROPORTION WHO SAY THEY TRUST MOST NEWS MOST OF THE TIME BY AGE GROUP, INCOME, AND EDUCATION - ALL MARKETS

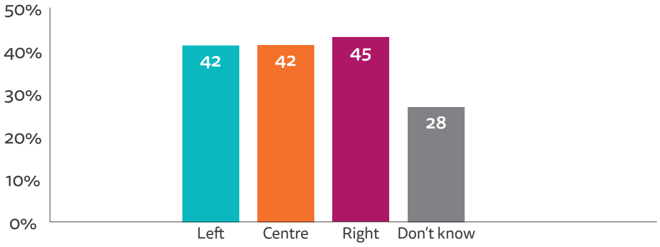


Q6_2016_1. Please indicate your agreement with the following statement - I think you can trust most news most of the time. *Base: Under 35s/35+ = 28,232/66,711, low/medium/high household income = 22,991/36,794/22,301, and low/medium/high formal education across all markets = 17,766/41,631/35,546.*

[17] https://schibsted.com/news/users-trust-in-editorial-media-is-influenced-by-four-key-drivers/

But looking across respondents who identify as being politically on the left, in the centre, or on the right, at the aggregate, there is little difference when looking at data from all our respondents (though there are partisan differences in some individual countries).

PROPORTION WHO SAY THEY TRUST MOST NEWS MOST OF THE TIME BY POLITICAL LEANING



Q6_2016_1. Please indicate your agreement with the following statement - I think you can trust most news most of the time. **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 across all markets = 14,530/47,033/13,081/18,295. Note: Left-right question not asked in Hong Kong.*

MUCH OF THE PUBLIC HIGHLIGHTS SIMILAR FACTORS UNDERPINNING TRUST IN NEWS

In this year's *Digital News Report*, we add further nuance to the work we have done over the years on trust in news by exploring what factors different members of the public say matter the most to them when it comes to deciding which news outlets to trust.

This is another step that builds on years of research documenting how trust in news is often highly dependent on political context, correlated with interpersonal trust and trust in other institutions in society. In some countries and at the level of individual brands, trust is often intertwined with political partisanship. It also sometimes in part reflects the volume of media criticism people see, often strategically targeted at independent news media and individual journalists by political actors who use social media and other channels to try to undermine those they see as challenges to their agenda.[18]

As part of our survey, we ask all respondents about eight different possible factors that we have derived from qualitative research we have done in the past, from existing academic work, and from input from journalists keen to better understand the drivers of trust in news. (They are not exhaustive, but cover several different factors known to influence people's relationship with news.)

TRUST FACTORS INCLUDED IN OUR SURVEY
How important or unimportant are the following to you when it comes to deciding which news outlets to trust?

Whether

- they have a long history
- they have high journalistic standards
- they are too negative
- they are biased
- they exaggerate or sensationalise
- they are transparent about how the news is made
- their values are the same as mine
- they represent people like me fairly

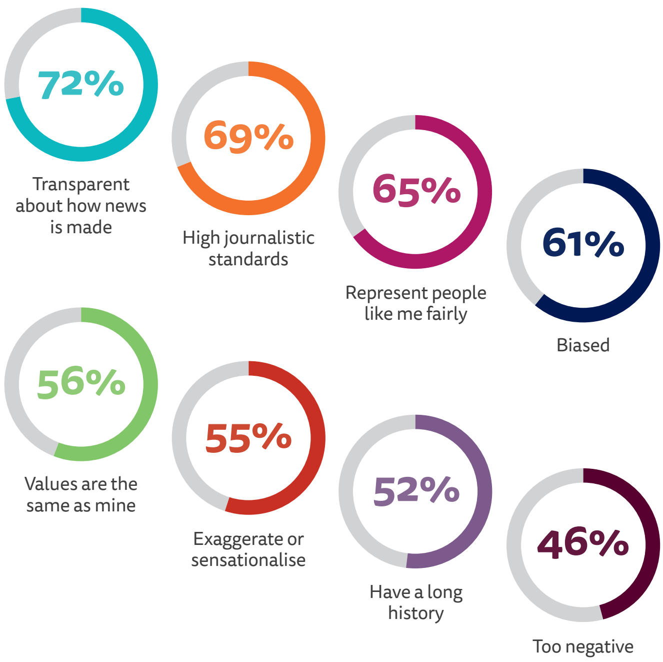
The eight factors include some that many journalists associate with trustworthiness – such as high journalistic standards, transparency, freedom from bias, avoiding exaggeration and sensationalism, and representing people fairly.

They also include factors that are not necessarily associated with trustworthiness from an editorial point of view, but that previous research suggests nonetheless *are* important in influencing whether people trust news – including whether news outlets have a long history, are seen as too negative, or have the same values as the respondent.

All these factors are in the eye of the beholder, often necessarily so (there are limits to what people can realistically learn about, e.g. the journalistic standards of specific outlets). What matters when it comes to trust is whether people *perceive* someone as trustworthy. The 'coercive power' these beliefs exercise over journalists – as per the sociological notion of 'social facts' – rests on people's perceptions having real-world consequences, including for which news media they give credence to, engage with, and rely on.

While there is important variation from country to country, two things stand out looking at our data across all markets. First, while *all* these factors are important for many respondents (underlining the complexity of what engenders trust), several of those that are most frequently highlighted by respondents as important for how they think about trust are also central to how many journalists think about trustworthiness – in particular transparency, high journalistic standards, and a freedom from bias. Fairness, also often identified as central to trustworthy news reporting, is, in our survey, specifically concerned with whether respondents believe that people like themselves are being represented fairly, and this too is among the factors most frequently underlined as important.

PROPORTION WHO SAY EACH FACTOR INFLUENCES WHICH NEWS OUTLETS TO TRUST - ALL MARKETS



Q1_TRUST_REASON_2024. Is the following important or not important to you when it comes to deciding which news outlets to trust? *Base: Total sample across all markets = 94,943.*

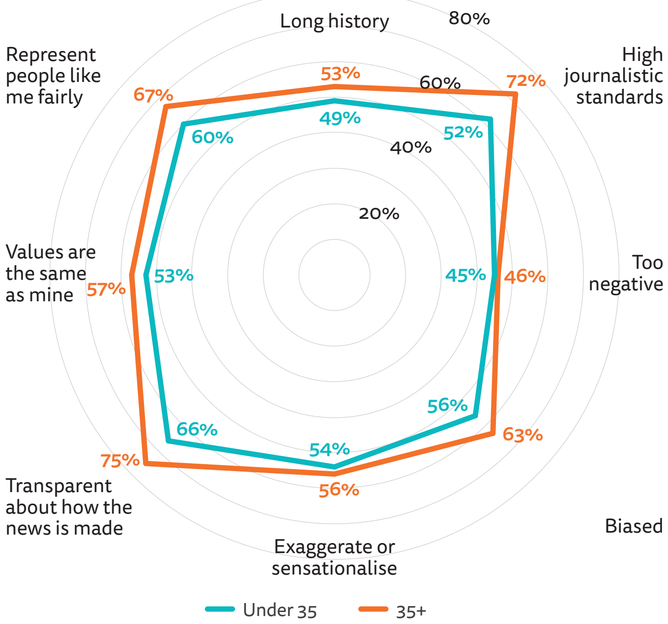
[18] Our own work includes the three-year Trust in News project with extensive research across Brazil, India, the UK, and the US (https://reutersinstitute.politics.ox.ac.uk/trust-news-project), and last year's Digital News Report data on media criticism and the relationship between press freedom and public trust in news (https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2023/how-we-ask-about-news-brands).

With data from 47 markets, there is necessarily a lot of important detail and variation, but it is worth highlighting that there is less cross-country variation when it comes to the emphasis on transparency, high standards, and representing people like me fairly than there is on the other factors. And while other factors are also important, they rarely rival these core values. Take the question of whether a news outlet's values are 'the same as mine' – in none of the markets we cover do significantly more respondents identify this as an important factor in deciding which outlets to trust than identify transparency, high standards, and representing people fairly.

Second, while it is sometimes assumed that different generations and different parts of the political spectrum think very differently about news, our data suggest that this is not actually the case when it comes to factors related to trust.

If, for example, we compare younger respondents (aged under 35) with older ones (35 and over), the differences are quite small, and not always as one might expect – journalists and editors may associate concerns over social justice and perceived unfairness with younger people, but actually older people are more likely to say this is important for how they think about trust in news.

PROPORTION WHO SAY EACH FACTOR INFLUENCES WHICH NEWS OUTLETS TO TRUST BY AGE GROUP - ALL MARKETS

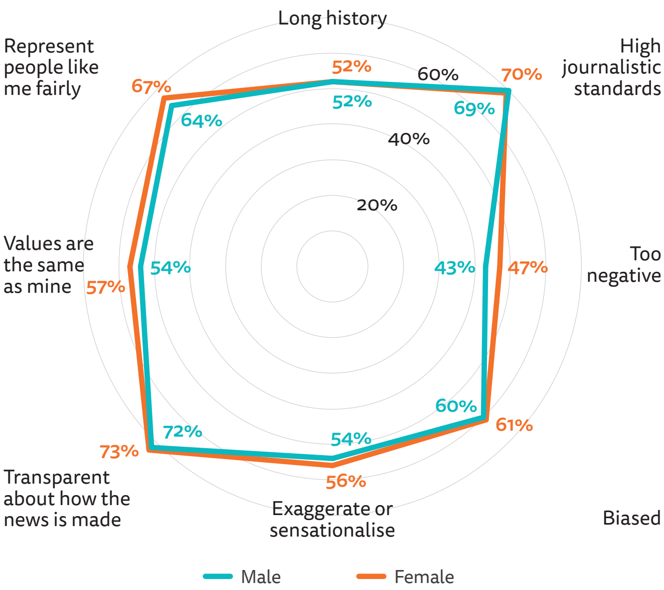


Q1_TRUST_REASON_2024. Is the following important or not important to you when it comes to deciding which news outlets to trust? *Base: U35/35+ across all markets = 28,232/66,711.*

Looking more closely at smaller subgroups, people who are more affluent, more highly educated, older, and more on the right politically are more likely to insist on the importance of people like them being represented fairly – our data thus provide quite a different picture from the impression some seem to have of discontent driven by younger, aggrieved lefties.

With some minor differences, the pattern we see when looking at different generations also holds for education, income, and, as shown in the chart, for gender.

PROPORTION WHO SAY EACH FACTOR INFLUENCES WHICH NEWS OUTLETS TO TRUST BY GENDER - ALL MARKETS



Q1_TRUST_REASON_2024. Is the following important or not important to you when it comes to deciding which news outlets to trust? *Base: Male/female across all markets = 46,050/48,893.*

This relative lack of variation is in itself a striking finding. Almost everything about how people use and think about news is deeply shaped by basic socio-economic factors such as age, income, and education, and people's relations with media are often influenced by political orientation. But this is not the case for how people think about trust in news overall.

Thus, our research suggests that much of the public has much in common in terms of what they want from news, and what they want is at least somewhat aligned with what many journalists and media would like to offer them. What varies is not so much which factors people highlight. They are strikingly similar. What varies are the conclusions they come to, reflecting often very different experiences with the news.

When trust in news is low, the issue is thus generally not that people do not know what to look for. It is that many do not feel they are getting it. If they are right, news has a product problem. If they are wrong, news has a communications problem.

'THE OTHER DIVIDE' – HOW POLITICAL ORIENTATION AND INTEREST IN POLITICS INTERSECTS WITH TRUST IN NEWS

While our data challenge the idea that younger people think very differently about trust in news from how older people think about it, and suggest education, income, and gender matter less than they do in some other respects, they do underline the importance of people's relationship with politics – but not in the way that is often assumed.

Many journalists operate in polarised political environments. Given that many of the most engaged news users – and of the most aggressively expressive voices on social media – are highly partisan, and given that some prominent politicians on the right (e.g. Donald Trump) and sometimes on the left (e.g. Andrés Manuel López Obrador) routinely attack the media, it is often presumed that people on the right think very differently about trust in news from those on the left or in the political centre.

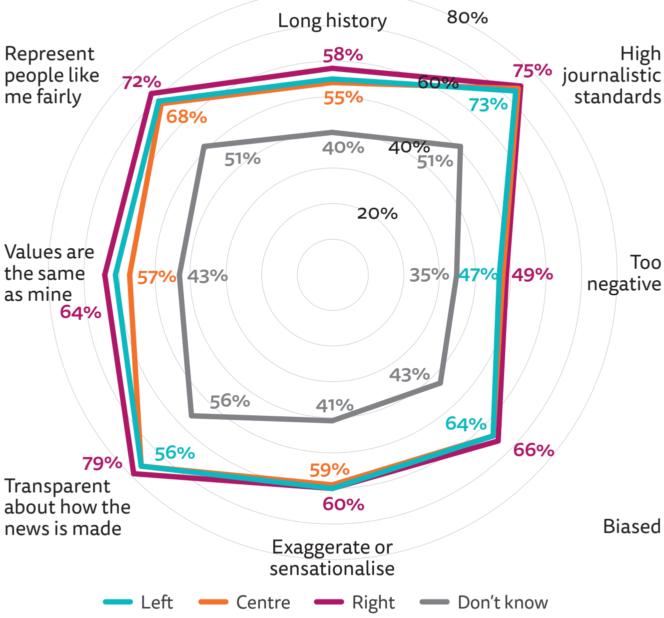
Certainly they often do when it comes to individual news media brands, and in some countries when it comes to trust in news overall. But they do not when it comes to what factors matter for them in deciding which news outlets to trust.

Differences between often highly engaged partisans on the right and on the left, or for that matter those with more centrist political orientations, are very small in our data. Instead, the most important political divide in how people think about what factors shape their trust in news is what political scientists call 'the other divide', the far less immediately obvious divide between those people who make politics a central part of their lives and those who do not (Krupnikov and Ryan 2022).

One way to capture this is to break down our respondents by political orientation. Across all markets covered, 15% of our respondents identify as very or fairly left-wing, 14% as very or fairly right-wing, and 50% centre or slightly to the left- or right-of-centre. The remaining 20% answer 'don't know' when asked about their political orientation.

PROPORTION WHO SAY EACH FACTOR INFLUENCES WHICH NEWS OUTLETS TO TRUST BY POLITICAL LEANING - ALL MARKETS

No significant differences across the political spectrum but the large part of the public that say 'Don't know' when asked about their political orientation, who trust the news far less than the public at large, including political partisans, are far less sure what is important for them in deciding which news outlets to trust.



Q1_TRUST_REASON_2024. Is the following important or not important to you when it comes to deciding which news outlets to trust? **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 across all markets = 14,530/47,033/13,081/18,295. Note: Left-right question not asked in Hong Kong.*

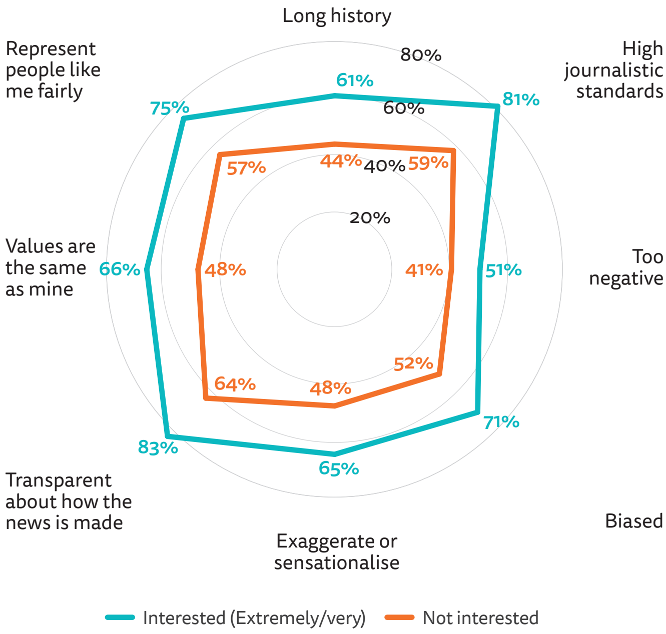
In discussions often focused on partisan division, this latter, large group is sometimes overlooked. Younger people, people with limited formal education, and people with lower incomes are more likely to be part of it. (Just as they are likely to trust the news less than the public at large.) It is also a group that is over-represented among consistent news avoiders and casual users, so often these are people who have a tenuous connection not only with conventional party politics, but also with the news.

Just 28% of the respondents who answer 'don't know' when asked about their political orientation say they think they can trust most news most of the time – compared to 43% of those on the left, 42% in the centre, and 45% on the right. And, as the next chart shows, they are far less likely to name any of the eight factors included in our survey as important for how they decide which (if any) news outlets to trust. This often overlooked large minority not only trusts the news less, they are also less sure about how to make up their minds about whom to trust.

Further illustrating this point, we can shift from political position to political interest. If we compare, across 47 markets, those who say they are interested in politics (27% of the sample) with those who say they are not interested in politics (35%) we find very different levels of trust. Around half (50%) of those interested in politics say they trust most news most of the time compared to 32% of those not interested.

The gaps in terms of which factors, if any, people identify as important are aligned with those outlined earlier in this chapter. Our qualitative research suggests that those that are not interested in politics are also much less sure about how to even begin to make up their mind about news media that many see as completely intertwined with, even indistinguishable from, political institutions that they often feel distant or even alienated from.

PROPORTION WHO SAY EACH FACTOR INFLUENCES WHICH NEWS OUTLETS TO TRUST BY POLITICAL INTEREST - ALL MARKETS



Q1_TRUST_REASON_2024. Is the following important or not important to you when it comes to deciding which news outlets to trust? **Q2_new2018.** How interested, if at all, would you say you are in politics? *Base: Interested/not interested = 26,767/32,595.*

SECURING TRUST IN NEWS CALLS FOR DIFFERENT APPROACHES FOR DIFFERENT PARTS OF THE PUBLIC

Across the world, our data thus capture two important things. First, most people think in broadly similar terms about what are the most important factors when it comes to deciding which news outlets to trust – transparency, high standards, freedom from bias, and treating people fairly. These are things many journalists aspire to live up to, and for these journalists, it is encouraging to see that there is such an overlap between how many reporters and much of the public think about what makes news worth trusting. The challenge for news media when it comes to winning and maintaining trust is to show that they live up to these expectations.

In some countries, trust in news is heavily influenced by politics, and people's trust in individual news brands is often influenced by whether they perceive the outlet in question as editorially aligned with their own political values (or at least not antithetical to them).

But generally, across differences in age, gender, and to a large extent across differences in education, income, and political orientation in terms of left, centre, and right, most people think in very similar terms about what matters for trust in news – even though they sometimes come to different conclusions both about news in general and particular news outlets. Many might appreciate that some outlets have values that are the same as their own. But when it comes to what people say is decisive for which outlets they trust, this factor is far less frequently mentioned than core issues around transparency, standards, bias, and fairness.

Second, however, for a large minority of the public with a distant relation to politics – a fifth of our respondents don't know where they stand in conventional political terms – trust in news is much lower, many of them are less clear about what might help engender trust, and their connection with news is generally more precarious. The same goes for the overlapping group of respondents who are not interested in politics – more than a third.

The challenge for news media with this part of the public is to overcome the distance and convince them that news is engaging, interesting, and valuable enough to spend time with – and on that basis perhaps over time earn their trust as well.

2.2 Public Attitudes Towards the Use of AI in Journalism

Amy Ross Arguedas

Artificial intelligence (AI) and similar technologies have been used by news organisations for some time, but these uses have been largely behind the scenes. However, recent developments in Large Language Models (LLMs) and the public launch of ChatGPT in late 2022, followed by a flurry of other generative AI tools, marked a real shift in public interest and in how publishers have been thinking about AI for the production of news content.

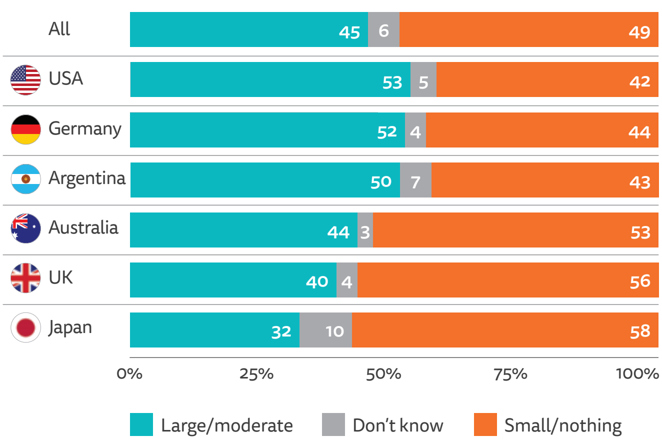
Research on the uptake of AI in newsrooms is rapidly growing, (e.g. Beckett and Yaseen 2023; Simon 2024), but we know considerably less about how news audiences might receive these incursions, especially in a context of low or declining trust in news in many countries. We have included questions on the topic in this year's survey, at a time when audiences themselves are learning and forming their own opinions about AI in general and few will understand how these technologies might be used in journalism specifically.

In the analysis that follows, we supplement our survey data with illustrative quotes and insights from qualitative research conducted by the market research agency Craft with 45 digital news users in Mexico, the UK, and the US. The research took participants on an individual 'deliberative journey', capturing their baseline understanding and comfort levels with AI in initial interviews, and then presenting them with news-related AI case uses to experiment with and reflect on. Just as publishers can use AI for different kinds of tasks, audiences approach distinct uses with varying degrees of comfort, more generally onboard with backend tasks and innovation in the delivery of news than with the generation of new content.

AI AWARENESS AND HOW IT SHAPES COMFORT WITH AI IN JOURNALISM

Before asking respondents about AI in news, we wanted to have a sense of their awareness about AI more generally. Across 28 markets where AI questions were included, self-reported awareness is relatively low, with less than half (45%) of respondents saying they have heard or read a large or moderate amount about it. Meanwhile, 40% of respondents say they have heard or read a small amount, and 9% say nothing at all.

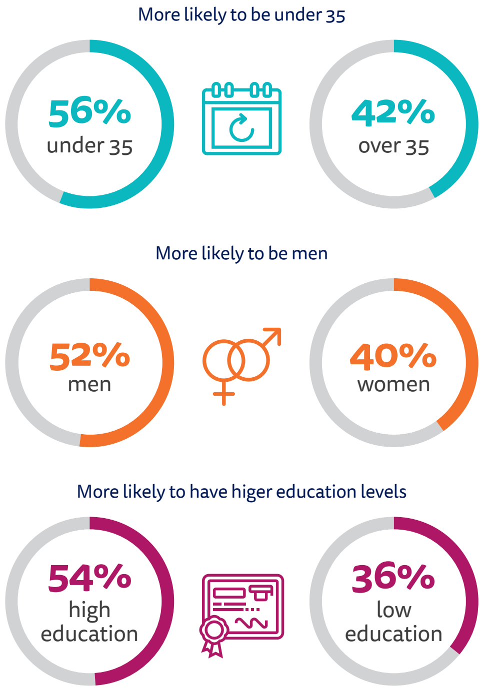
PROPORTION WHO SAY THEY HAVE HEARD A LARGE OR MODERATE AMOUNT ABOUT AI - SELECTED MARKETS



Q1_AIAwareness_2024. How much, if anything, have you heard or read about artificial intelligence (AI)? *Base: Total sample in each market ≈ 2000.*

Aside from country-level differences, AI awareness varies across socio-demographic groups, with marked gaps across age, gender, and education levels. On average, we find that AI awareness is higher among younger people, men, and those with higher levels of education.

PROFILE OF THOSE WHO SAY THEY HAVE HEARD A LARGE OR MODERATE AMOUNT ABOUT AI - AVERAGE 28 MARKETS



Q1_AIAwareness_2024. How much, if anything, have you heard or read about artificial intelligence (AI)? *Base: Under 35/35+ = 15,088/41,446, male/female = 27,178/29,356, high/low education = 11,363/20,292 across 28 markets. Note: Question not asked in Africa, Bulgaria, Chile, Colombia, Croatia, Greece, Hungary, Indonesia, Malaysia, Peru, Romania, Singapore, Slovakia, Taiwan, Thailand, and Turkey.*

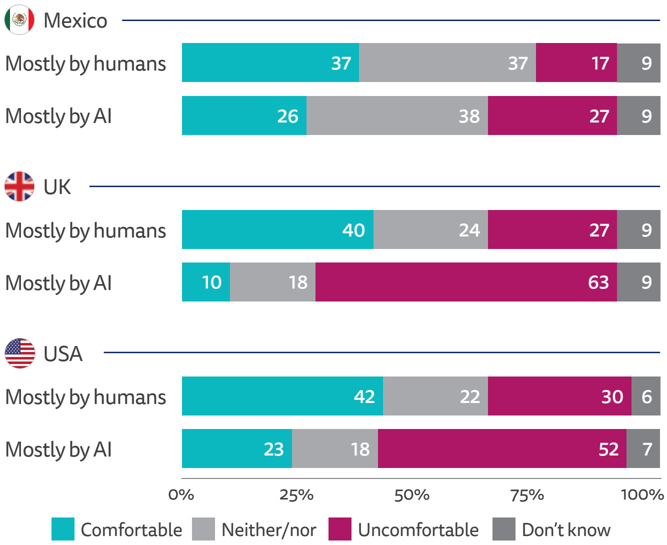
These figures give us a sense of how much information about AI respondents have encountered, but not where they have seen it, what kind of information it is, or what experiences they have had with AI themselves. Recent studies suggest people don't always recognise what AI is, and most are not using it on a regular basis.[19] Evidence from our qualitative data echoes these findings, also showing that, while a small subset of people may already be using AI tools and many will have encountered information about it in the news and social media, for others, science fiction TV series and films also shape their perceptions.

> ***AI is in all the devices we use now – phone, computer, in everything we do on the internet. And there are more advanced things like ChatGPT that students now use a lot.***
> *Female, 26, Mexico*

> ***It worries me slightly, if we do become very dependent on AI and AI becomes a big thing, how AI can basically just destroy the world. It's a very 'out there' take, but it's one of those we just can't help think about. I adore sci-fi, The Terminator, Space Odyssey.***
> *Male, 19, UK*

Understanding how much people have seen or heard about AI is important for publishers because, in the absence of personal experience, popular portrayals play an outsized role in colouring perceptions of AI overall, which in turn shape attitudes towards using news made with or by AI – something most have likely not seen that much of yet. Our survey data show that, across all countries, only a minority currently feels comfortable using news made by humans with the help of AI (36%), and an even smaller proportion is comfortable using news made mostly by AI with human oversight (19%).

PROPORTION WHO SAY THEY ARE COMFORTABLE USING NEWS PRODUCED IN THIS WAY - SELECTED MARKETS



Q2_AIComfortlevel_2024. In general, how comfortable or uncomfortable are you with using NEWS produced in each of the following ways …? Mostly by artificial intelligence (AI) with some human oversight. Mostly by a human journalist with some help from artificial intelligence (AI). *Base: Total sample in each country ≈ 2000.*

We also find that people with greater AI awareness tend to feel relatively more comfortable with the use of AI in journalism. While still very low, comfort using news made mostly by AI is twice as high among those who have seen or heard more about AI (26%) relative to those who have seen less (13%). We see a similar gap when asking about comfort using news produced mostly by a human journalist with some help from AI (45% versus 30%).

DIFFERENT COMFORT LEVELS FOR DIFFERENT AI USES

Most audiences have not put much, if any, thought into how AI could be used for news, and our qualitative research shows that people's starting point is generally one of resistance, suspicion, and fear. However, over the course of testing out a variety of AI use cases in journalism, participants often developed and articulated more nuanced opinions about where they were more or less comfortable with the implementation of AI, depending on whether it is used behind the scenes, to deliver news in new ways, or to generate entirely new content. Perceptions about AI are rapidly evolving, and while majorities are put off by AI news in principle, it is possible that, as audiences become more familiar with AI, some may become more open to its adoption for at least certain functions.

> ***If it was disclosed to me that this was produced by an AI [I] will probably go, 'Okay, well, then I'll just not read that.'***
> *UK, 40, Male*

Many publishers have, for years, used AI and similar technologies for behind-the-scenes tasks such as monitoring trending topics online, transcribing interviews, and personalising recommendations for readers (Beckett 2019). However, concerns with guardrails and best practices have become salient as more newsrooms explore using generative AI for increasingly public-facing applications. For example, in the US, *Men's Journal* has used AI to help write summary pieces based on previous articles. In Mexico and the UK, radio and TV channels have experimented with synthetic newsreaders. Others have trialled applications like

[19] https://www.ons.gov.uk/businessindustryandtrade/itandinternetindustry/articles/publicawarenessopinionsandexpectationsaboutartificialintelligence/julytooctober2023
https://www.pewresearch.org/short-reads/2023/05/24/a-majority-of-americans-have-heard-of-chatgpt-but-few-have-tried-it-themselves/

headline testing, summary bullets, chatbots, image generation, and article translation. Still, most publishers are moving cautiously, learning from the mishaps of others who have come under scrutiny for insufficient disclosure and oversight, in some cases resulting in inaccurate information making its way onto news websites.[20]

Men's Journal (US) article written with an AI tool

Max, one of Radio Fórmula's (Mexico) synthetic newsreaders

Our qualitative research tells us that people tend to be most comfortable with behind-the-scenes applications, where journalists use AI to make their work more efficient and in ways not directly visible to audiences. They are less comfortable with, but in some cases still open to, the use of AI for delivering news in new ways and formats, especially when this improves their experiences as users and increases accessibility. They are least comfortable with the use of AI to generate entirely new content. Regardless of the application, there is widespread agreement that total automation should be off limits and a human should always remain 'in the loop' – which coincides with how most publishers are thinking about the implementation of generative AI.

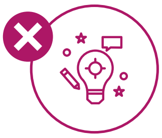
AUDIENCE COMFORT WITH THE USE OF AI ACROSS DIFFERENT STAGES OF NEWS PRODUCTION

Behind the scenes

AI used to aid journalistic practice that is not visible to the audience but could potentially influence the creation of news content.

Delivering news in new ways

AI used to create new audience-facing experiences e.g. creating new/bespoke formats, talking to chatbots, summaries.



Creating content

AI used to generate different kinds of content that the audience consumes directly e.g. writing text, creating images, graphics and videos.

> ***I am somewhat/mostly comfortable with … AI manipulating and reformatting information to some extent, but AI does not seem to be intentionally creating new content in these scenarios.***
> *Female, 24, US*

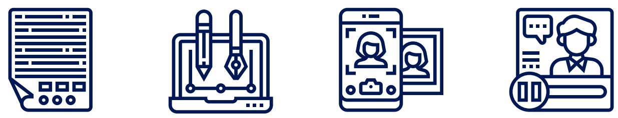
While audiences tend to be uncomfortable with the use of AI to create new content, not all forms of content are seen equally. We found participants to be least resistant towards the use of AI to generate text-based content, followed by illustrations or stylised graphics and animations, which many reasoned are nothing new and add aesthetic appeal. Meanwhile, they are most strongly opposed to the use of AI for creating realistic-looking photographs and especially video, even if disclosed. Past research shows that people often rely on images and videos as 'mental shortcuts' when trying to discern what to trust online, with many expressing the idea that 'seeing is believing' (e.g. Ross Arguedas et al. 2023). This crucial function of images, often serving as proof of what is being reported, helps explain why synthetic imagery disrupting that logic would cause greater uneasiness.

> ***Some uses of AI do not alter anything, they are graphics, complementary images and can make the content more attractive.***
> *Female, 24, Mexico*

> ***For producing images and things like that, that is a little more tricky because it can generate images that appear to show something that is not reality, especially when given the prompts by the author.***
> *Male, 41, US*

EXAMPLES OF DIFFERENT FORMATS SHOWN TO RESEARCH PARTICIPANTS

Most acceptable **Least acceptable**



Text | Illustrations and animations | Photos | Videos

As noted in the Executive Summary, the topic at stake also shapes comfort levels. While comfort levels are low across the board, audiences express greater discomfort with the use of AI to generate content about more consequential topics, such as politics, relative to less consequential topics such as sports. In our qualitative research, participants note that the potential to cause harm and the scope of such harm varies considerably depending on the subject matter.

> ***Different types of news carry different weights. AI fact-checking football game scores … for a sports article has almost no consequence if it reports something incorrectly/with bias. Fact-checking an article about a political party or election news could have catastrophic consequences.***
> *Non-binary, 24, US*

[20] https://apnews.com/article/journalists-ai-counterfeit-writers-479cc3869c0638df5bbb26d4b1e4f18f

The type of information being generated also shapes perceptions, as some people are more open to the use of generative AI for creating outputs based on verifiable 'facts' and 'numbers', such as sports scores or even elections reports, than they are when it comes to more complex news they believe requires human interpretation, nuance, sensitivity, and even emotion. Such distinctions are not only about accuracy, but also about more philosophical questions around what journalism is and what kinds of work people think are and should remain fundamentally human.

> ***The best thing is to try to keep the use of AI to facts, numbers, statistics, and not analysis or opinion, where more context needs to be given. That is where humans are needed, to provide that value.***
> *Female, 52, Mexico*

> ***When you're delivering, like, really triggering and hopeless news, it's very emotional. Regardless of whether you want it to, it will affect you in some way or other, and I feel like humans kind of have that emotional context.***
> *Male, 19, UK*

AI NEWS, DISCLOSURE, AND TRUST

One key concern for publishers experimenting with AI is how using these technologies may impact public trust in news, which Digital News Report data show has declined in many countries in recent years. Many worry about the potential for AI to generate biased, inaccurate, or false information. However, beyond ensuring information quality, some are grappling with best practices around disclosing AI use. On the one hand, providing transparency about how they are using AI may help manage expectations and show good faith. On the other hand, to the extent that audiences distrust AI technologies, simply knowing news organisations are using them could diminish trust. Early experimental research suggests that audiences view news labelled as AI-generated as less trustworthy than that created by humans.[21] This tension means that news organisations will want to think carefully about when disclosure is necessary and how to communicate it.

> ***It is very important that there is human supervision. I trust a human more, because we have the ability to analyse and discern, while AI is not sensitive, it has errors, it does not know how to decide what to do … it does not have a moral compass.***
> ***Male, 28, Mexico***

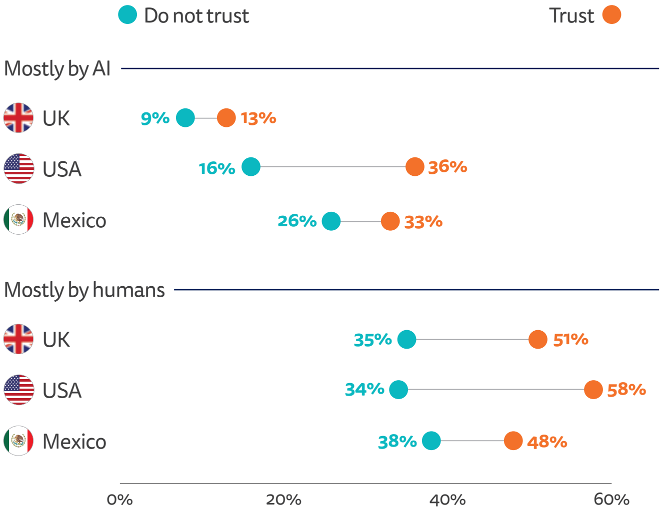
When asked about disclosure generally, participants in our research welcome and often demand complete transparency about the use of AI in journalism. However, when probing further on diverse AI applications, not everyone finds it necessary across all use cases. Some view labelling as less important when it comes to behind-the-scenes uses where human journalists are using AI to expedite their work but imperative for public-facing outputs, especially those made mostly by AI, since it might shape how they approach the information or whether they want to use it in the first place.

> ***I don't think they need to disclose when [it's] … behind the scenes and it's still [a] human interacting with both those services. It's still human-based, they're just helping with assistive tools, so I think it's fine and it speeds up the process a lot.***
> *Male, 26, UK*

> ***News organisations and journalists should always let consumers know that they have used AI. I think there are net benefits in that kind of transparency … so consumers can make the decision themselves of whether they want to consume this content or not.***
> *Female, 28, US*

Furthermore, trust can itself shape how comfortable audiences are with using news produced by or with the help of AI. We find that trusting audiences tend to be more comfortable, particularly when it comes to using news produced mostly by humans with the help of AI, with gaps in comfort levels between trusting and untrusting audiences ranging from 24 percentage points in the US to 10 percentage points in Mexico. It is likely that audiences who tend to trust news in general have greater faith in publishers' ability to responsibly use AI, relative to their untrusting counterparts.

PROPORTION OF THOSE WHO DO AND DO NOT TRUST NEWS WHO ARE COMFORTABLE USING NEWS PRODUCED IN THESE WAYS - SELECTED MARKETS



Q2_AIComfortlevel_2024. In general, how comfortable or uncomfortable are you with using news produced in each of the following ways …? **Q6_2016_1.** Please indicate your level of agreement with the following statements. I think you can trust most news most of the time. *Base: Trust/Do not trust in Mexico = 719/723, UK = 723/687, and USA = 688/780.*

We see evidence of this in our qualitative findings as well, both in general and at the outlet level. Individuals who trust specific news organisations, especially those they describe as reputable or prestigious, also tend to be more open to them using AI. Whether it is because they view such outlets as more benevolent, have greater faith in their oversight capacities, or simply think they have the most to lose if they do it carelessly, these segments of the audience appear less uncomfortable with journalists using AI. On the flipside, audiences who are already sceptical or cynical of news organisations may view their trust further eroded by the implementation of these technologies.

> ***It depends on who uses it … If a serious, recognised, prestigious news company uses it, I feel that it will be well used, because I don't think a company will put its prestige at play.***
> *Male, 28, Mexico*

[21] https://ora.ox.ac.uk/objects/uuid:5f3db236-dd1c-4822-aa02-ce2d03fc61f7/files/s9306t097c

CONCLUSION

Just as there is no single AI technology or application, there is no single view from audiences on whether the use of AI by news organisations is acceptable or not. While the starting point is largely of resistance, when examining specific uses, audiences express nuanced opinions across a range of different applications, and our findings highlight the areas they seem more comfortable accepting as well as those that are more likely danger areas, where news organisations will want to tread lightly or entirely avoid.

Our findings show audiences are most open to AI uses that are behind the scenes and areas where AI can help improve their experiences using news, providing more personalised and accessible information. They are less comfortable when it comes to public-facing content, sensitive or important topics, and synthetic videos or images that may come across as real, and where the consequences of error are viewed as most consequential. Overall, there is consensus that a human should always be in the loop and complete automation should be off limits.

Carefully threading the needle when it comes to disclosing the use of AI will be crucial for publishers concerned with audience trust, as will be explaining to audiences what AI use in journalism looks like. Excessive or vague labelling may scare off individuals with already low trust and/or those with limited knowledge about what these uses entail, who will likely default to negative assumptions. But failing to provide audiences with information they may want to decide what news to use and trust could equally prove damaging.

These are still early days, and public attitudes towards the application of AI in journalism will continue to evolve, especially as the balance between abstract considerations and more practical experience shifts if larger parts of the public use AI tools more in their personal and professional life. At present, many are clear that there are areas they think should remain in the hands of humans. These kinds of work – which require human emotion, judgement, and connection – are where publishers will want to keep humans front and centre.

2.3 More than 'Just the Facts': How News Audiences Think about 'User Needs'

Richard Fletcher

It is sometimes assumed that the public neither wants nor needs anything more than 'just the facts' from the news media. The perceived value of pure facts – uncontaminated by bias, free of unnecessary subjectivity, not weighed down by context and nuance – has a powerful hold on the public imagination, and extends into many areas of cultural life beyond the news media.

However, a long history of academic media research has shown that people find value in news consumption in ways that go well beyond the factual information it provides. Back in the 1940s, Bernard Berelson (1949) described how people living in New York felt a sense of companionship and connectedness from reading the newspaper, and from the 1970s onwards, researchers have detailed a wide range of 'uses and gratifications' – such as entertainment and escapism – that people can find through news or other forms of media use.

Today, many news organisations increasingly think carefully about the needs of their audience, grounding their understanding using tools like the 'user needs model', originally developed at the BBC and later evolved by Dmitry Shishkin and others, structuring and classifying content in terms of how well it satisfies people's basic needs like knowledge and understanding, through specific user needs such as 'inform me', 'divert me', and 'give me perspective'. This model differs from uses and gratifications theory in many ways, but what they both share is the core idea that people want a variety of things from the news media, and they might want different things at different times.

The user needs model is just one way for news organisations to better understand their audience, but it has been widely adopted in many different newsrooms around the world to guide their thinking and structure their output. In this year's survey we asked a series of questions about what people want from the news media, and how well they think they do at providing it, informed by different needs identified by the model. User Needs 2.0 has identified eight needs people have from news (e.g. 'update me', 'keep me engaged'), which sit in four categories of more basic need (see the following table), which we might think of as fundamental drivers or motivations.[22] We therefore asked respondents about the importance of each user need to them ('Thinking about the role that news plays in your life, how important or unimportant are each of the following?') and how well the news media do in providing it ('Thinking about the role that news plays in your life, in your opinion how good or bad is the news media at providing you with each of the following?'). The analysis for this chapter will discuss both basic needs and specific user needs.[23]

Basic need	User need	Question wording
Knowledge	Keep me engaged	'News that keeps me engaged with issues in society'
	Update me	'News that keeps me up to date with what's going on'
Understanding	Educate me	'News that helps me learn more about topics and events'
	Give me perspective	'News that offers different perspectives on topical issues'
Feeling	Divert me	'News that is entertaining'
	Inspire me	'News that makes me feel better about the world'
Doing	Connect me	'News that makes me feel connected to others in society'
	Help me	'News that provides practical information and advice for day-to-day life'

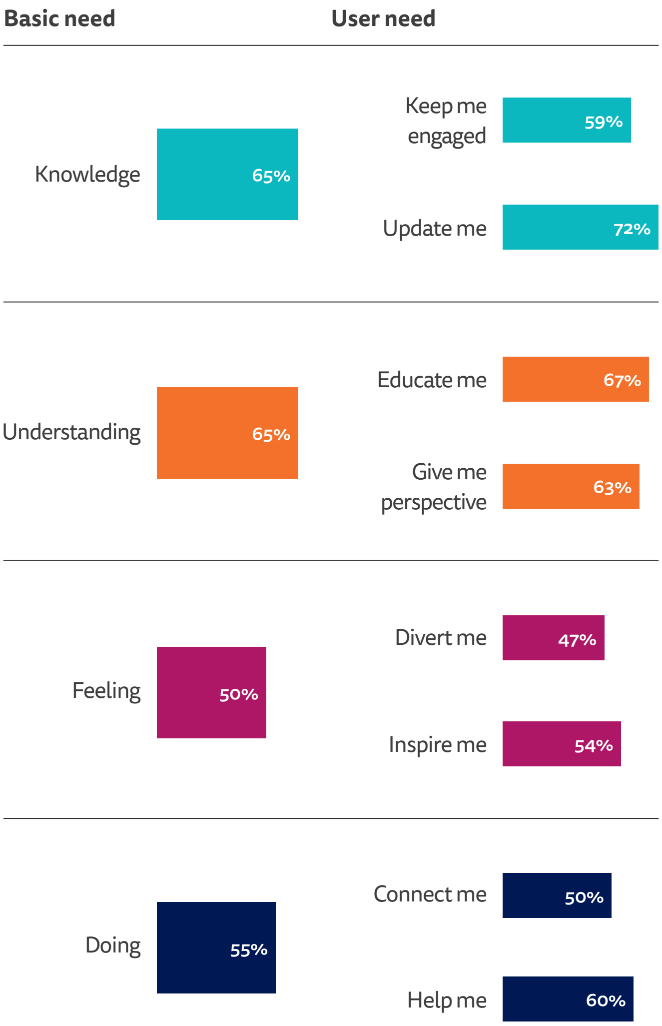
[22] https://smartocto.com/research/userneeds/
[23] Very/somewhat important and very/somewhat good responses are recoded as 1 with all other responses recoded as 0. Percentages for user needs are the mean of the recoded responses. Percentages for basic needs are the mean of the mean of the two user needs for each respondent.

WHAT IS THE MOST IMPORTANT USER NEED?

If we look across all 47 markets included in the survey, we see that news that satisfies the basic needs of knowledge and understanding is deemed very or somewhat important by two-thirds (65%) of the population. News designed to help people with doing something is seen as important by 55%, and news designed to help people feel something is the least important driver (50%) – but still deemed important by half of all respondents.

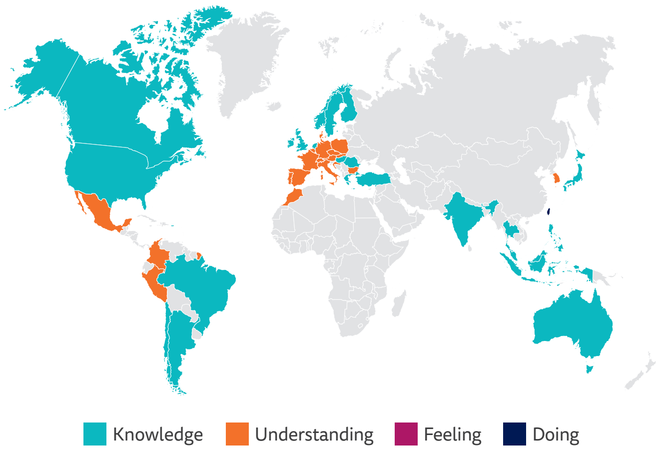
At the more granular level of specific user needs, 'update me' (72%), 'educate me' (67%), and 'give me perspective' (63%) emerge as the most important. 'Divert me' is the only user need seen as important by less than half of respondents (47%), perhaps in part because diversion is so abundantly available from many kinds of media.

PROPORTION THAT SAY EACH USER NEED IS IMPORTANT TO THEM - ALL MARKETS



As we can see from the following map, in around two-thirds of the markets we surveyed, the knowledge need is the most important, with understanding ahead in the remaining one-third of cases. The only exception is Taiwan, where doing is slightly ahead.

MOST IMPORTANT BASIC NEED - ALL MARKETS



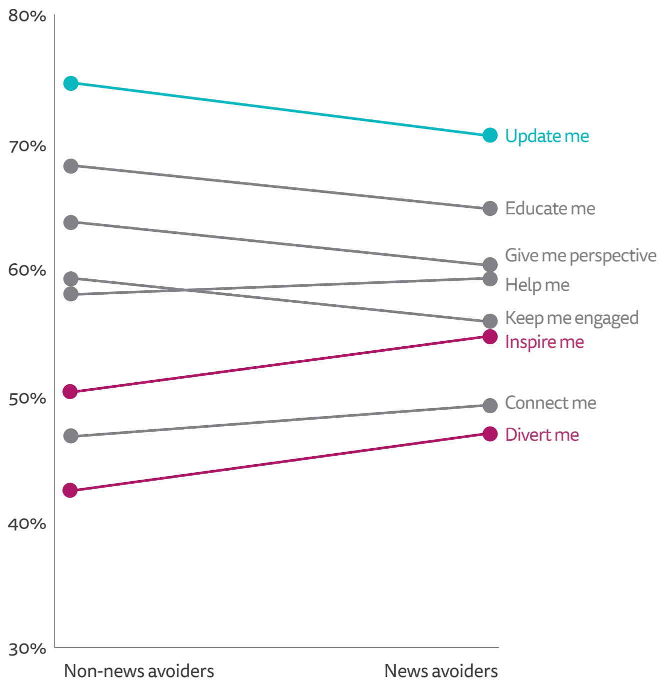
Q1_Needs_2024. Thinking about the role that news plays in your life, how important or unimportant are each of the following? *Base: Total sample in each market ≈ 2000.*

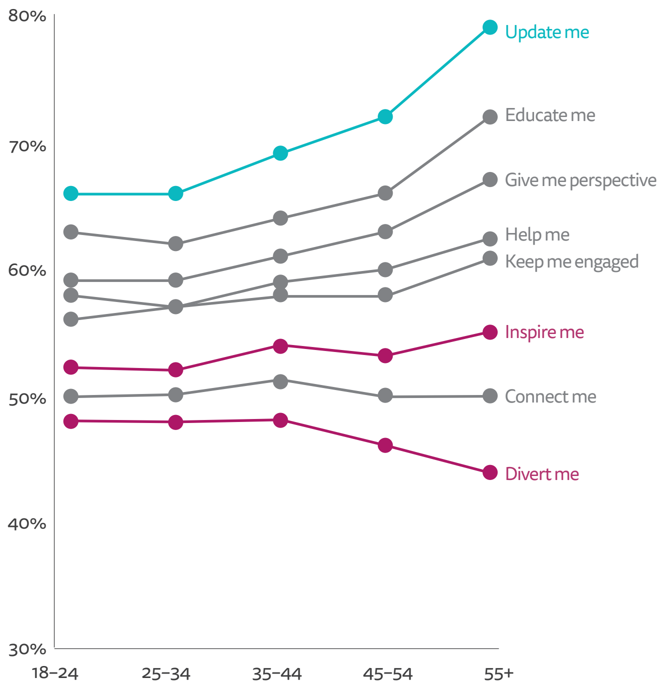
In Western Europe (e.g. France and Germany), Southern Europe (e.g. Spain and Italy), and Eastern Europe (e.g. Poland and Czech Republic), as well as parts of Latin America (e.g. Mexico and Colombia), news that helps people understand things is typically seen as more important – though the differences between knowledge and understanding are usually very small and not statistically significant. Elsewhere, such as in Northern Europe (e.g. UK and Norway), Asia-Pacific (e.g. India and Japan), North America (e.g. USA and Canada), parts of Africa (e.g. Nigeria and Kenya), and the rest of Latin America (e.g. Brazil and Argentina), knowledge emerges slightly ahead of understanding. But, again, the differences are small. The key point is that in most cases, news that helps with knowledge and understanding is deemed more important than news that helps with feeling and doing.

It is important to keep in mind that the questions in the survey specifically ask about what people want from the news media, and not the information environment more broadly. Information that is diverting or that helps people solve problems may be more important overall to their lives, but may not be something that they expect the news media to provide. Also, the clustering of the same basic needs in geographic regions is unlikely to be caused by geography per se, but because, as comparative media research has consistently shown, countries in the same parts of the world often have similar political and media systems due to shared culture and history.

The importance of needs varies only slightly between different demographic groups. As we might expect, for younger people and regular news avoiders, needs like 'inspire me' and 'divert me' become slightly more important relative to needs like 'update me', but the basic hierarchy of user needs described above stays the same.

PROPORTION THAT SAY EACH USER NEED IS IMPORTANT TO THEM BY NEWS AVOIDANCE AND AGE GROUP - ALL MARKETS



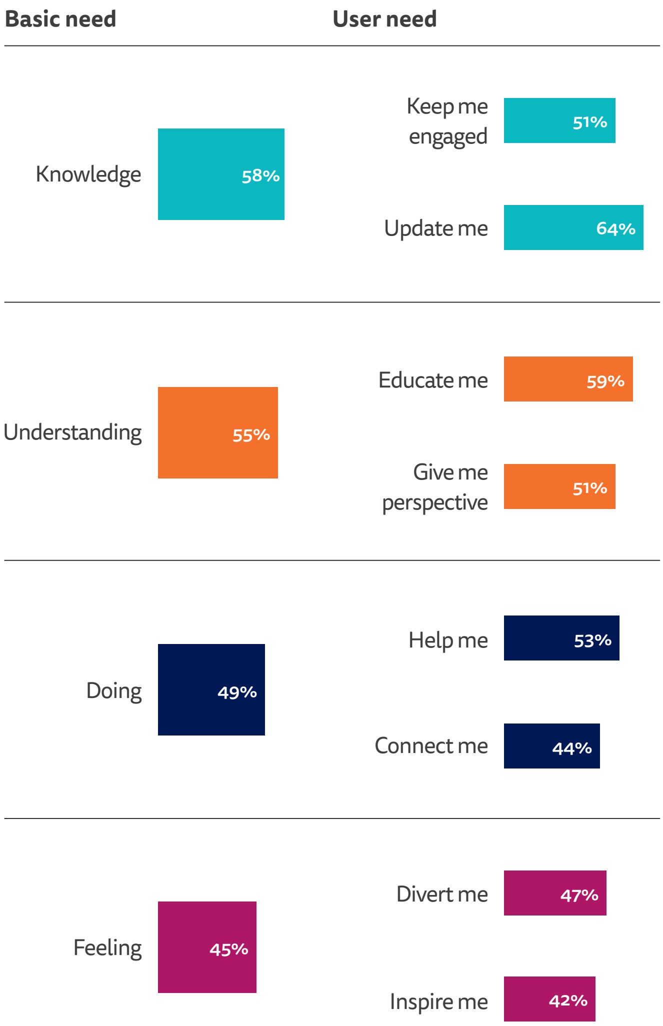


Q1_Needs_2024. Thinking about the role that news plays in your life, how important or unimportant are each of the following? *Base: Non-news avoiders/news avoiders in all markets = 57,737/37,206 and 18-24/25-34/35-44/45-54/55+ in all markets = 11,025/17,207/17,476/16,212/33,023.*

WHAT USER NEEDS ARE BEING BEST SERVED?

In terms of how well people think the news media satisfy different user needs, on average across 47 markets people are more likely to think that they do a good job on *knowledge* needs (58%), especially 'update me' (64%) – perhaps not surprising given that many people would say this is the core function of the news media. Just over half think that the news media do a good job on *understanding* (55%), followed by *doing* needs (49%) – with under half (45%) saying the news does a good job of needs to do with how people *feel*, especially 'inspire me' (42%).

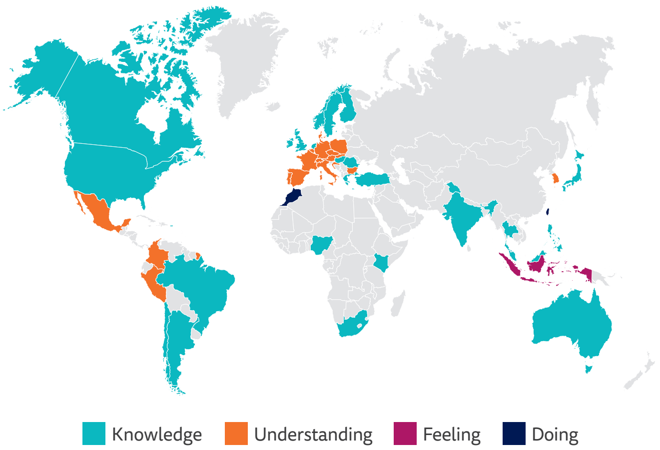
PROPORTION THAT SAY THE NEWS MEDIA DO A GOOD JOB OF PROVIDING EACH - ALL MARKETS



Q2_Needs_2024. Thinking about the role that news plays in your life, in your opinion how good or bad is the news media at providing you with each of the following? *Base: Total sample in all markets = 94,943.*

In most countries surveyed, people are more likely to think that their knowledge-based user needs are being best served. However, this also means that in many of the countries where people rate understanding as being more important – such as in parts of Western Europe (France and Germany) – this is not the area in which people think the news media excels.

BEST SERVED BASIC NEED - ALL MARKETS



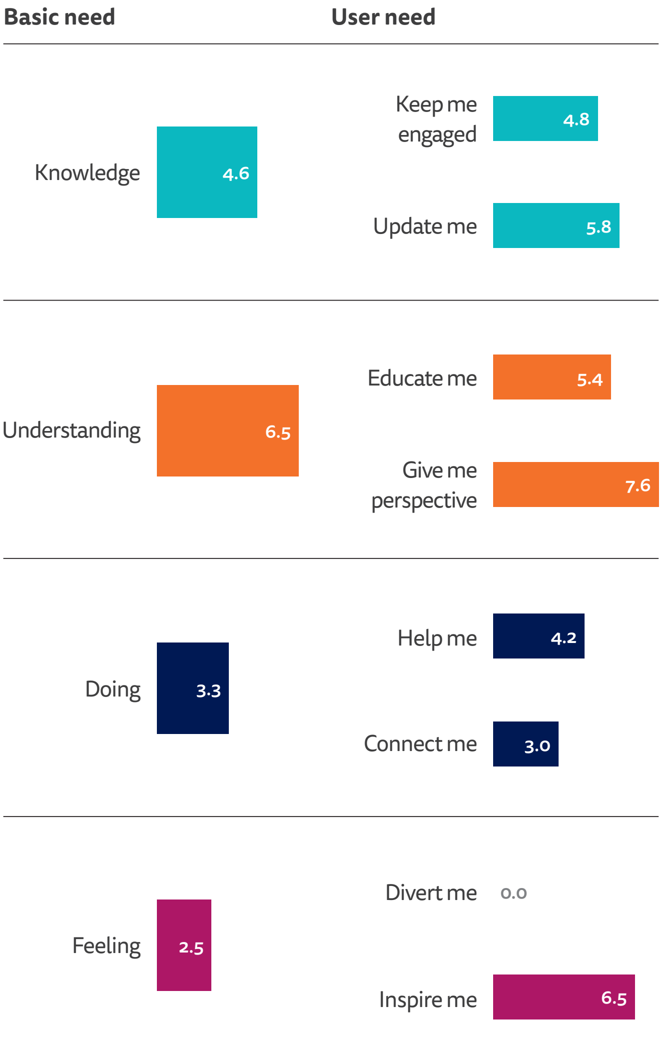
Q2_Needs_2024. Thinking about the role that news plays in your life, in your opinion how good or bad is the news media at providing you with each of the following? *Base: Total sample in each market ≈ 2000.*

WHAT DO AUDIENCES THINK IS THE BIGGEST PRIORITY FOR THE NEWS MEDIA?

This begins to point to types of news coverage that the public thinks are important, but where many think the news media is falling short of their needs. We can explore this more formally using a technique called gap analysis. If we look at the percentage point gap between the proportion that think a particular need is important, and the proportion that think the news media do a good job of providing it, we can identify the needs with the biggest gap between importance and performance. But we can go a step further, and weight that gap by the overall importance of the user need, which gives us a sense which gaps are more important than others in the eyes of the public. We call this the User Need Priority Index, because it highlights those user needs where the public thinks it is important for the news media to perform better (and possibly the area where there is most potential for improvement).[24]

As we showed in the Executive Summary, when we compute this index, we see that the top priority for the news media across all 47 markets is providing news that helps people with understanding (6.5) – more specifically, news that gives people different perspectives (7.6). Doing more to address knowledge-based needs (4.6), particularly 'update me' (5.8), also emerges as a priority. Even though this is the area that many people rate most positively in terms of performance, it is so fundamental to what the news media do in the eyes of the public that even small gaps between importance and performance matter. News that helps people with doing things is less of a priority (3.3), and although feeling-based needs are the least important (2.5), this masks the fact that the 'inspire me' need is the second highest priority individual user need (6.5). This need scores higher among news avoiders and younger people, making it an even greater priority for news organisations aiming to bring back these audiences.

USER NEED PRIORITY INDEX - ALL MARKETS

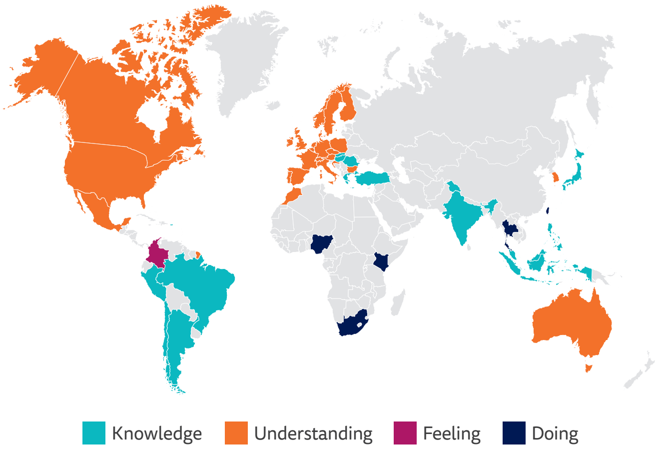


Q1_Needs_2024. Thinking about the role that news plays in your life, how important or unimportant are each of the following? **Q2_Needs_2024.** Thinking about the role that news plays in your life, in your opinion how good or bad is the news media at providing you with each of the following? *Base: Total sample in all markets = 94,943. Note: User Need Priority Index = Percentage point gap between importance and good job, multiplied by importance (as a decimal).*

If we look at the top priority by country, we see that in most markets in the survey understanding-based needs are the priority for the public. Generalising somewhat, this is mostly true of countries in the Global North, including Europe, Australia, and North America. In much of the Global South, including Latin America and Asia-Pacific, news that satisfies people's need for knowledge is top.

[24] The User Need Priority Index for basic needs is based on the same computation using the percentages at the basic need level. It is not the mean of the User Need Priority Index for each pair of user needs.

TOP PRIORITY ACCORDING TO THE USER NEED PRIORITY INDEX - ALL MARKETS



Q1_Needs_2024. Thinking about the role that news plays in your life, how important or unimportant are each of the following? **Q2_Needs_2024.** Thinking about the role that news plays in your life, in your opinion how good or bad is the news media at providing you with each of the following? *Base: Total sample in each market ≈ 2000. Note: User Need Priority Index = Percentage point gap between importance and good job, multiplied by importance (as a decimal). User Need Priority Index for basic needs is calculated based on percentages for basic needs, not the average of user needs.*

This clear pattern maps onto different levels of press freedom. As the next chart shows, in countries where press freedom (as measured by Reporters without Borders) is lower, knowledge-based needs are more of a priority. This is probably because the public recognises that it may be difficult to find out basic information about what is happening due to restrictions on what the press can and cannot say. However, in countries where press freedom is higher, this is less of an issue, and the public instead is looking for ways of better understanding what is happening. This all highlights how user needs are not only shaped by what individuals want at a given time, but also the broader context in which they find themselves.

CONCLUSION

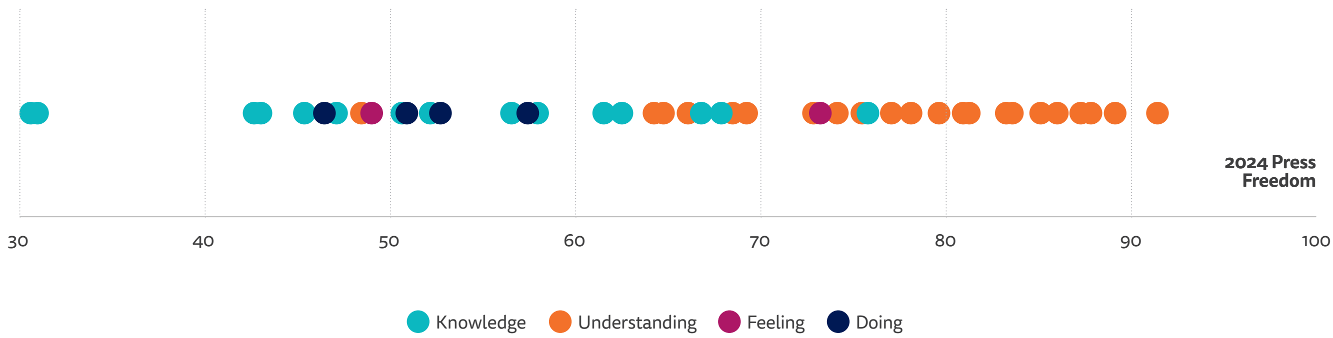
In this chapter, we have explored what the public wants from the news media using the lens of the User Needs Model 2.0. While it is clear that people want the news media to provide facts that keep them knowledgeable about current events ('update me'), there is also a strong need for the news to 'educate me' and 'give me perspective'. And even though these needs are on average considered more important than news that helps people do or feel things, a substantial minority of at least 40% of the public consider these important too. In other words, while providing news that keeps people up to date with what is going on is a defining part of what the public wants and expects, many people want the news media to satisfy a range of needs, and few want 'just the facts'.

Although young people and news avoiders are slightly more likely to want news that inspires or diverts them than older people or non-avoiders, the importance of knowledge and understanding remains. The news media may be able to appeal to hard-to-reach groups by providing diverting or inspiring content, but the data suggest that this should not come at the expense of coverage that explains and informs.

By looking at the gap between what needs people think are important and what they think about what the news media provide, we can learn about their priorities through the User Need Priority Index. In countries with high levels of press freedom, people's knowledge-based needs are more likely to be met, and people want to learn more about issues and hear different perspectives. In countries with lower levels of press freedom, the public to some extent seems to recognise that their more basic knowledge needs are not being met by the media – and this is their priority.

TOP PRIORITY ACCORDING TO THE USER NEED PRIORITY INDEX BY PRESS FREEDOM - ALL MARKETS

In markets with lower levels of press freedom, the top basic need priority is knowledge, but in countries with higher levels of press freedom it is understanding.



Q1_Needs_2024. Thinking about the role that news plays in your life, how important or unimportant are each of the following? **Q2_Needs_2024.** Thinking about the role that news plays in your life, in your opinion how good or bad is the news media at providing you with each of the following? *Base: Total sample in each market ≈ 2000. Note: User Need Priority Index = Percentage point gap between importance and good job, multiplied by importance (as a decimal). User Need Priority Index for basic needs is calculated based on percentages for basic needs, not the average of user needs. Press Freedom data from Reporters Without Borders (see country/market pages).*

2.4 How Much do People Pay for Online News? And What Might Encourage More People to Pay?

Craig T. Robertson

Our research into news payment over the last decade shows that in a few richer countries a significant number of people have started to pay for online news. Around four in ten people (40%) in Norway and a fifth (22%) in the United States say they pay for online news, but only around one in ten pay in France (11%) and the UK (8%). But after some growth during the COVID-19 pandemic, subscription numbers seem to have levelled. In our data, the proportion that pay for online news across 20 countries is 17% – a figure that has not changed for the last three years.

Our data also show persistent winner-takes-most patterns. A few big upmarket newspapers – such as the *New York Times*, *Le Monde*, and *El País* – have done best in recent years, having a strong presence in their respective markets. Industry data show a similar picture, with the *New York Times* reaching 10 million subscribers as of the start of 2024.[25] *El País* reported reaching 300,000 subscribers in 2023,[26] while *Le Monde* reached 500,000.[27]

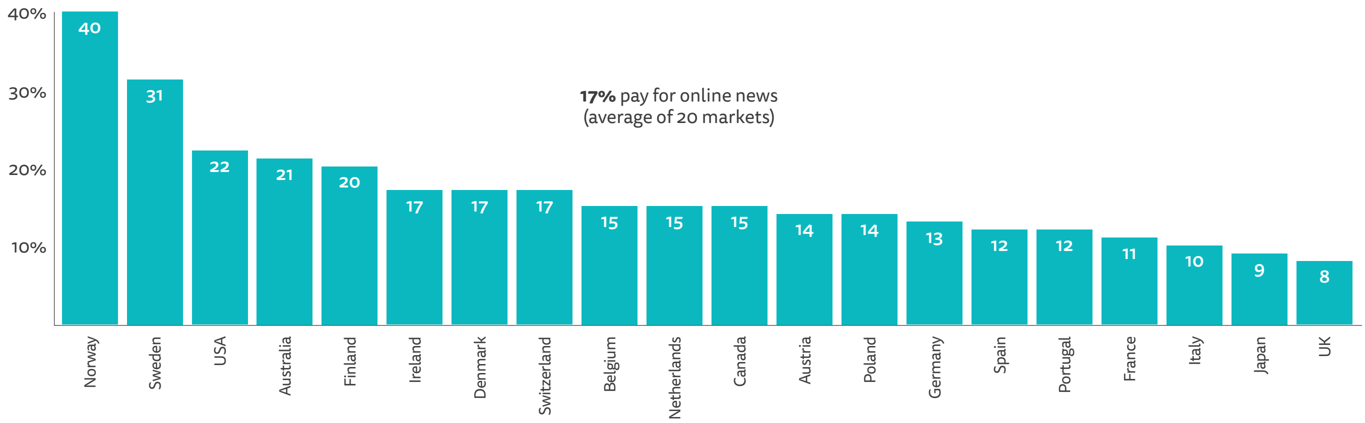
Yet while these headline numbers tell us something, they are only one way of looking at success. This is especially so given the wide range of prices charged and the many different kinds of payments now being used, including donations, low-cost trials, and high-cost premium subscriptions. Headline numbers can obscure the number of people on trials or special offers, or the rate of churn.

In this chapter, we explore the price being paid by digital subscribers across 20 countries and compare this with the official (non-trial) prices advertised by publishers. We also look at how much, if anything, non-subscribers might be willing to pay for online news and the strategies news brands might take to generate more reader revenue.

HOW MANY PEOPLE ARE PAYING FULL PRICE FOR THEIR NEWS SUBSCRIPTION?

For several years of the *Digital News Report*, we have asked survey respondents across a subset of 20 markets what online news brands they subscribe to. This has given us a picture of the winner-takes-most dynamic playing out across several markets like the US, where the *New York Times* is a dominant player, and Finland, where *Helsingin Sanomat* has a formidable subscriber base.

PROPORTION PAYING FOR ANY ONLINE NEWS IN THE LAST YEAR - 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, a donation, or one-off payment for an article or app or e-edition). *Base: Total sample in each market ≈ 2000.*

[25] https://www.nytimes.com/2024/02/07/business/media/new-york-times-q4-earnings.html
[26] https://www.prisa.com/en/noticias/noticias-1/el-pais-supera-los-300.000-suscriptores-en-solo-tres-anos
[27] https://www.lemonde.fr/en/about-us/article/2023/09/24/two-major-milestones-for-le-monde-s-independence_6139073_115.html

But in our qualitative work we found that many current and former digital news subscribers were not paying full price to access news. This was not surprising, since many news brands offer discounts or trials to new subscribers as a way to encourage people to sign up. But we wanted to try and quantify this in our research.

This year, we asked those who subscribed to different news brands to tell us how much they paid monthly for their main online news subscription, offering them payment bands to choose from (in the UK these were £1 or less, £2–£5, £6–£10, £11–£15, £16–£20, £21–£25, £26–£30, £31–£35, or £36+ per month). We then compared this to the full, non-discounted, non-trial monthly prices advertised for standard digital subscriptions[28] to the brands people said they paid for. The next chart shows the proportion of people in each country who pay less than the full asking price for their subscription.

PROPORTION OF NEWS SUBSCRIBERS WHO ARE PAYING LESS THAN THE FULL MONTHLY PRICE FOR THEIR ONLINE NEWS SUBSCRIPTION - SELECTED MARKETS

	Proportion paying less than full price for their subscription	Median cross-brand monthly price*	Median price in $USD**	Netflix monthly standard price	Spotify Premium monthly price
Poland	78%	36.5zł	$9	43zł	23.99zł
Canada	54%	$18 CAD	$13	$16.49 CAD	$10.99 CAD
Australia	49%	$20.50 AUD	$13	$16.99 AUD	$13.99 AUD
Ireland	48%	€12	$13	€14.99	€10.99
Austria	48%	€15	$16	€12.99	€10.99
Switzerland	47%	18 CHF	$20	20.90 CHF	13.95 CHF
Finland	47%	€17.50	$19	€11.99	€11.99
USA	46%	$16 USD	$16	$15.49 USD	$10.99 USD
Germany	46%	€18.50	$20	€13.99	€10.99
UK	41%	£11.50	$14.50	€10.99	£11.99
Japan	39%	¥1850	$12	¥1,490	¥980
Norway	38%	279 NOK	$25.50	109 NOK	129 NOK
Italy	35%	€8	$9	€12.99	€10.99
Netherlands	35%	€13	$14	€11.99	€10.99
Portugal	34%	€7	$7.50	€11.99	€7.99
Belgium	29%	€11	$12	€13.49	€10.99
Sweden	28%	149 SEK	$14	129 SEK	119.00 SEK
Spain	26%	€9	$10	€12.99	€10.99
Denmark	25%	99 DKK	$14	114 DKK	109 DKK
France	21%	€12	$13	€13.49	€10.99

Q7_SUBS_name_2022. You said you have paid a subscription/membership to a digital news service in the last year … Which of the following did you subscribe to? Please select all that apply. **Q1a_Pay_2024.** You said that you pay for an online news subscription. How much does your main online news subscription cost you per month? *Base: Ongoing digital news subscribers, ranging from Norway = 463 to UK = 131. Note: Figures reflect what people say they pay for their online news subscription compared to the full asking price for that subscription. *Prices accurate as of March/April 2024. Median monthly price across news brands reflects the median price of standard online news subscriptions across all major news subscription providers in the country. Median price balances between high-cost premium titles and lower-cost offers, which can skew averages. **Exchange rates as of April 2024. Prices were rounded.*

Across all 20 markets, 41% of subscribers say they are not paying the full sticker price, with the majority in Poland (78%) seeming not to pay the full amount, and large proportions in the UK (42%) and US (46%) also not on full-price subscriptions. In markets where the median price[29] of a subscription is higher, such as Switzerland, larger proportions of people are paying less than the full asking price. For example, *NZZ* costs around 29 CHF per month (~US$32), as does *Le Temps*. But in some other markets where subscriptions are relatively cheaper, such as Spain, Italy, and Portugal, larger proportions are paying the full amount or more. In Spain, a standard *El País* digital subscription is around €11 (~US$12), and *Público* in Portugal costs around €7 (~US$7.50).

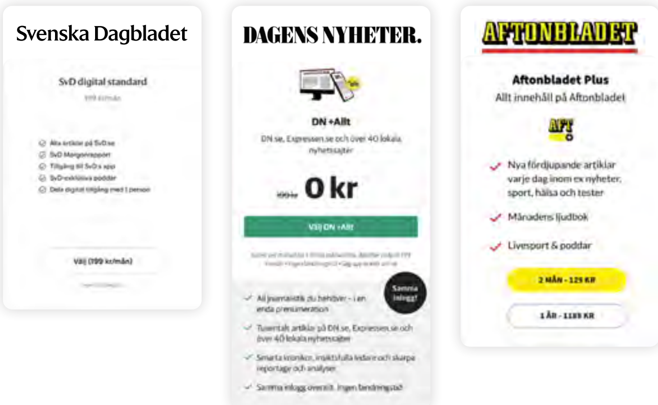
It is important to note that these estimates are based on survey data and subject to issues of recall. Individual news brands certainly have a picture of how many of their own subscribers are paying full price. But what our data allow is the drawing of a wider picture across the industry, highlighting that there is some commonality across markets. While many people in the US and UK seem not to be paying full price, this also appears to be the case in Australia, Canada, and elsewhere.

WITH TRIALS, PUBLISHER STRATEGIES VARY ACROSS COUNTRIES

A major reason many people may not be paying the full asking price, as already mentioned, is the fact that many news brands offer discounts and trials as a way to encourage people to sign up. This has been an effective strategy for many news brands looking to build their subscriber base by offering readers a chance to try things out and see what their brand is all about.

Strategies on this differ by country. Looking at Sweden, where the majority of subscribers (65%) are paying full price for the basic package (or more), shorter trials seem to be the norm: *Dagens Nyheter* is free for the first three months and *Aftonbladet* is discounted for the first two months if a monthly subscription is chosen. *Svenska Dagbladet* didn't appear to be offering a trial at the time of writing.

SUBSCRIPTION OFFERS IN SWEDEN



Brands in other markets offer trials or discounts for much longer periods of time – sometimes up to a year or more. The US is an example of this, where three of the most prominent news brands – the *New York Times*, *Washington Post*, and *Wall Street Journal* – offer inexpensive one-year trials.

Trials may lead to people being won over. As one subscriber (Male, 27) to the *Wall Street Journal* told us in our report from last year on paying for news (Newman and Robertson 2023): 'I'm on the 0.99 cent per week promo for the *Wall Street Journal*. I do think I'll keep the subscription beyond the promo rate though because the content has won me over.' But this is not a guarantee. Cheap trials can be effective in getting sign-ups, but keeping people subscribed is another story.

[28] Brands often offer multiple types of subscriptions. We looked at standard digital subscriptions that give access to news content without the additional benefits that premium or standard+ subscription packages offer.
[29] The median price balances between high-cost premium titles and lower-cost 'freemium' offers, which can skew averages.

The jump from a cheap trial to full price is often too much for many. Trial subscribers may not also continue to full price if they didn't get into the habit of using their subscription. As one former subscriber (Female, 27) to the *Cincinnati Enquirer* told us: 'I really never used the subscription – I only signed up because it was $1.'

SUBSCRIPTION OFFERS IN THE UNITED STATES

It must be kept in mind, however, that our survey data represent a snapshot of what people said they were paying for their news subscriptions at one point in time. We can't say how many people paying trial prices will potentially move on to paying full prices. But our prior work on this suggests that many may not.

In last year's *Digital News Report*, we found that 28% of news subscribers in the US said they had cancelled one or more news subscriptions in the last year. In the UK, the proportion was 17%. After gaining many subscribers during the Trump presidency, it has been reported that the *Washington Post* has lost hundreds of thousands of subscribers in recent years.[30] Based on what our qualitative and quantitative work tells us, it may be the case that many of these were trial subscribers who cancelled early or decided not to continue paying after the trial period ended. Again, raw subscriber numbers do not tell the full story, with such figures potentially masking high rates of underlying churn, where many trial subscribers are lost, only to be replaced with new trial subscribers.

HOW MUCH WOULD NON-SUBSCRIBERS CONSIDER PAYING, IF ANYTHING?

In addition to asking news subscribers how much they paid, we also asked non-subscribers how much, if anything, they would be willing to pay monthly for an online news subscription. The headline finding is that, across the 20 markets we track, the majority (57%) would not consider paying anything. This rises to around two-thirds in the UK (69%), Germany (68%), and France (67%). A smaller – but still significant – proportion say the same in Finland (43%), Norway (45%), and Ireland (46%). Our data document that much of the public does not believe online news is worth paying for.

There is, however, a group of non-payers who say they would be willing to pay a small amount for a monthly subscription. Keeping in mind that people are answering a hypothetical question ('what would you pay?'), data suggest there is room for growth in markets that already have high levels of subscription, such as Finland, where half of non-subscribers would consider paying up to €10 per month.

PROPORTION OF THOSE WHO DO NOT PAY FOR ONLINE NEWS WHO SAY THEY MIGHT PAY A SMALL AMOUNT OR NOTHING - SELECTED MARKETS

	Proportion willing to pay €/£/$1 or less per month*	Proportion willing to pay €/£/$2–5 per month	Proportion willing to pay €/£/$6–10 per month	Proportion not willing to pay anything
UK	10%	15%	4%	69%
Germany	6%	14%	6%	68%
Japan	15%	13%	2%	67%
France	11%	13%	5%	67%
Belgium	12%	16%	7%	61%
Austria	9%	16%	9%	60%
Netherlands	13%	17%	8%	58%
Australia	10%	17%	10%	57%
Switzerland	11%	15%	10%	57%
Canada	12%	17%	9%	57%
USA	13%	17%	8%	56%
Poland	9%	10%	13%	55%
Denmark	14%	21%	8%	55%
Sweden	19%	17%	7%	54%
Spain	16%	21%	7%	51%
Italy	19%	20%	6%	50%
Portugal	17%	24%	6%	48%
Ireland	15%	25%	8%	46%
Norway	21%	17%	10%	45%
Finland	20%	23%	11%	43%

Q1b_Pay_2024. You said you don't currently pay for online news. If you were to pay for online news, what is a fair price that you would be happy paying, if anything? *Base: Those who do not pay for news online, ranging from Norway = 1146 to UK = 1803. *Note: Other pay brackets are: Denmark: 10 DKK or less, 11-50 DKK, 51-100 DKK. Japan: ¥200 or less, ¥201-1,000, ¥1,001-2,000. Norway: 10 NOK or less, 11-50 NOK, 51-100 NOK. Poland: 1 PLN or less, 2-5 PLN, 6-10 PLN. Sweden: 20 SEK or less, 21-100 SEK, 101-200 SEK. Switzerland: 1 CHF or less, 2-5 CHF, 6-10 CHF.*

WHAT ARE THE POTENTIAL APPROACHES TO ENCOURAGING PEOPLE TO PAY?

Over the last few years, publishers have developed a number of different models for optimising reader revenue. The chart below, adapted from Raabe (2024), shows a number of the most common approaches to monetising content from ad-based models to different paid approaches.

TYPES OF CONTROLLED ACCESS TO DIGITAL NEWS CONTENT

Least restrictive

Free:	No restrictions to support with donations
Donation:	Audience asked to support with donations
Metered:	Certain number of articles freely available weekly or monthly
Registration:	Users asked to register with website or app
Freemium:	Much (or most) content freely available, some articles reserved for subscribers
Partial:	Portions of articles visible, but full access requires subscription
Trial:	Access for a lower cost for a period of time
Premium:	Some free articles, most reserved for subscribers
Hard paywall:	No free articles

Hybrid

Most restrictive

Adapted from T. S. Raabe, 'The Norwegian Newspaper Industry in the Digital Age', Ph.D. thesis. University of Cambridge, 2024.

[30] https://www.thewrap.com/washington-post-lost-subscribers-biden-term/

Looking across markets, we find brands using a mix of strategies, rather than just a single approach. A common one, despite the increased focus on reader revenue in parts of the news industry, is free access. Many commercial news media continue to make all or most of their news available for free online, and seek to sell advertising around it (e.g. CNN, Sky News, RTL in Germany). In markets where they exist, many non-profit news media and public service media also provide online news for free (e.g. BBC).

At the other end of the continuum, some upmarket publications such as *The Australian* use a relatively hard paywall, but others such as the *New York Times*, the *Irish Independent*, and *de Volkskrant* (Netherlands) use a hybrid registration/premium approach, where readers can access some general news stories for free if they register, but where the rest of the content is for subscribers only. With the decline of third-party cookies, there has been a push for registration across the industry, a strategy which gives news brands the opportunity to communicate directly with readers via email and to better track logged-in audience behaviour for targeted communications or advertising. The goal here is to take those who register on the journey towards on-going subscription.

The following chart shows the approaches taken by some of the largest subscription brands in their respective markets, including *Gazeta Wyborcza* in Poland (articles are partially available to non-subscribers) and *Le Monde* (France), *Expresso* (Portugal), and *El País* (Spain), which operate a partial/premium approach, where some articles are free to access, while others have the first paragraph available before being cut off by a paywall. Finally, the freemium approach is adopted by many tabloids with large amounts of online traffic. This strategy, used by *Bild* (Germany), *VG* (Norway), and *Het Laatste Nieuws* (Belgium), allows them to offer much cheaper deals to subscribers, with these lower prices being offset by advertising revenue.

MAJOR NEWS BRANDS AND THEIR MONETISATION STRATEGIES

It goes without saying, however, that there is no one-size-fits-all approach to encouraging people to pay for news, and what works will vary from market to market, brand to brand. The size of these mentioned brands doesn't mean their approaches are necessarily the best way forward, especially for small or mid-sized publications.

THE FUTURE OF PAYING FOR NEWS

The news business is in a difficult spot and more publishers are looking to direct reader payment as a primary strategy to supplement advertising revenue. But in all countries we find that only a minority (17%) are willing to pay and, as we have shown, the rest are not prepared to pay very much at all. The majority (57%) would not consider paying anything.

Our findings, moreover, suggest that the news industry has, in many countries, already got most of the people interested enough to pay for current offers and at current prices, with rates of payment stagnating. Cheap trials have been one way for news brands to increase headline subscriber numbers, but it's not a guarantee that those on trial will continue to pay long term. We find that the tendency to offer discounts has resulted in a significant proportion of subscribers (41%) not paying full price.

Besides this group of payers, in most markets there is a group willing to pay something if the price and product are right, but it's only ever a small amount – and perhaps not enough to be attractive for publishers. Strategies to encourage those on the fence have included longer trials, bundled multi-brand offers, non-news features like games and recipes, or different packages of content like cut-down curated offers or replica e-editions at different price points.

Whatever the monetisation approach adopted by news brands, however, it is incumbent on news organisations to showcase their value to audiences, demonstrating why they are worth paying for. The industry has many different techniques to encourage people to pay, but they will only do so if it enriches their lives. A sizeable minority has been convinced to pay significant sums for current online news offers, but most people are not willing to pay for what is currently on offer. And among those not currently paying – who may be convinced to do so – are many who do not look open to existing standard offers and price points.

2.5 What do we Know about the Rise of Alternative Voices and News Influencers in Social and Video Networks?

Nic Newman

In recent years large social and video networks, offering powerful creator tools and free global distribution, have provided a platform for an increasingly wide range of voices and perspectives. Most of this content has nothing to do with news. Much of it generates very little attention, but some accounts and individuals have become increasingly influential around politics, and a range of other subjects.

As we discussed in the Executive Summary, in newer networks such as TikTok and Instagram as well as in long-standing video platforms like YouTube, mainstream media are significantly challenged by a range of so-called online influencers, creators, and assorted personalities, as well as smaller, alternative news outlets and ordinary people. This contrasts with older networks such as Facebook and X where mainstream media and journalists still tend to lead the conversation when it comes to news, albeit with strong competition from the other sources.

But what kind of online influencers and alternative voices are we talking about? Which groups are paying most attention to them, and what type of 'news' do they discuss? How reliable is the information they share and what does this mean for wider society?

In this chapter we explore these questions in five countries (United States, United Kingdom, France, Argentina, and Brazil) through analysing open survey responses across six of the most popular networks for news – Facebook, X, YouTube, Instagram, Snapchat, and TikTok. In our survey we asked a random selection of those that used each network for news to state where they paid attention (mainstream media and their journalists or one or more of the alternative sources). Based on these selections, we then asked them to name up to three mainstream and alternative accounts they followed most closely that related to news and counted the most popular individuals and news brands from the combined data. This methodology, which relies on recall, is likely to underplay the long tail of small accounts that characterises this space, but it does give us some idea about the biggest alternative accounts in each country, as well as their relative importance compared with mainstream media and journalists.

PROPORTION WHO PAY ATTENTION TO EACH FOR NEWS ON EACH PLATFORM - ALL MARKETS

JOURNALISTS MOSTLY LEAD		ONLINE PERSONALITIES MOSTLY LEAD		
X (formerly Twitter)	**Facebook**	**YouTube**	**Instagram**	**TikTok**
1. **Journalists/news media 53%**	1= **Journalists/news media 39%**	1. **Online influencers and personalities 46%**	1. **Online influencers and personalities 53%**	1. **Online influencers and personalities 57%**
2. Online influencers and personalities 45%	1= Online influencers and personalities 39%	2. Journalists/news media 41%	2. Journalists/news media 41%	2. Ordinary people 43%
3. Politicians/activists 43%	1= Ordinary people 39%	3. Alternative news sources 32%	3. Ordinary people 34%	3. Journalists/news media 34%

Q12_Social_sources. You said that you use <platform> for news … When it comes to news on <platform>, which of these sources do you generally pay most attention to? Please select all that apply. *Base: Randomly selected news users on Facebook = 22,441, X = 5414, YouTube = 17,614, Instagram = 8997, Snapchat = 909, TikTok = 5694 across all markets.*

It is important to note that this methodology draws on audience perceptions of what is meant by news, and this definitional issue is most relevant when discussing the online influencers and personalities category. As well as news creators and commentators, we find it also includes celebrities such as Taylor Swift and Lionel Messi who rarely talk about topics like politics directly. Their inclusion, however, shows that many younger users, in particular, take a wide view of news, including updates on music, sport, food, fitness, fashion, and travel.

In the lists below, we have chosen to focus on journalists, influencers, and alternative voices that mostly address issues of news and politics head-on in their social and video accounts (setting aside celebrities) and we compare these with news brands that do the same.

UNITED STATES

In the Executive Summary we noted that the United States has a much higher use of YouTube for news compared with many other countries, with a high proportion of those users who say they are paying attention to alternative news sources. X is another important network for alternative voices in the US, where creators have been encouraged in recent years by owner Elon Musk. The network has recently refocused its strategy on video and is supporting commentators like Tucker Carlson, who was dismissed by Fox News, and has subsequently built a significant audience there.

Our list of the most mentioned individuals is headed by Carlson along with Joe Rogan who runs a successful daily show on YouTube (as well as Spotify). It is striking that all of the most mentioned (top ten) individual names are known for political commentary or chat rather than original newsgathering. Most of the content is partisan with little or no attempt to put the other side, and the entire top ten list is made up of men. Many of these names can hardly be called 'alternative', as they often come with decades of experience from legacy media, having previously been fixtures for years on traditional cable or talk radio networks.

Tucker Carlson's interview with Vladimir Putin (Feb 2024) was viewed over 200m times on X and 30m on YouTube.

MOST MENTIONED INDIVIDUAL NEWS-RELATED ACCOUNTS - USA

	Personality name	Known for	Main platform	Followers
1	Tucker Carlson	Conservative commentary	X	11.6m (X)
2	Joe Rogan	Podcaster/Conservative Chat	YouTube	16m (YT)
3	David Pakman	Left leaning commentator	YouTube	2m (YT)
4	Tim Pool	Conservative commentary	YouTube	1.35m (YT)
5	Alex Jones	Right-wing commentary	X	2.1m (X)
6	Ben Shapiro	Conservative commentary	YouTube	6.75m (YT)
7	Anderson Cooper	CNN anchor	X, Instagram	9.5m (X), 4.1m (IG)
8	Bryan Tyler Cohen	US progressive talk	YouTube	2.59m (YT)
9	Jimmy Dore	Comedian, commentator	YouTube	1.3m (YT)
10	Dave Rubin	Libertarian commentator	YouTube	2.1m (YT)

Q12_Social_sources_2024_ Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok = 498. Lists based on 1427 mentions (604 mainstream and 821 alternative).*

Some of these US individuals are attached to wider online networks, such as the Daily Wire and Blaze TV (conservative) and Young Turks and Medias Touch (progressive) that contain multiple creators within a wider brand. But whatever the politics, the look is remarkably consistent – somewhere between a podcast and a TV broadcast – with mostly male hosts armed with oversized microphones talking to mostly male guests.

The contentious nature of some of this content often doesn't appeal to advertisers, so some personalities have focused on other ways of generating money such as appealing directly for donations or selling merchandise. A few, such as Tucker Carlson, are trying out premium subscriptions, which provide additional content or networking opportunities for a fee. Alternative voices received more citations in total from our US sample than traditional media, but mainstream media brands and their journalists still accounted for 42% of mentions. The biggest brand, CNN, was mentioned five times more than the biggest individual account (Tucker Carlson). Mainstream media anchors such as Anderson Cooper (CNN) and David Muir (ABC) also featured lower down the list.

MOST MENTIONED NEWS BRANDS - USA

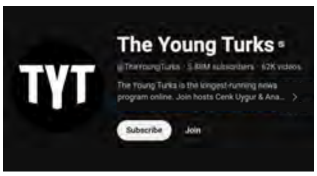
	Brand name	Type	Followers (X)	Followers (YouTube)
1	CNN	Broadcaster	62m	16m
2	Fox News	Broadcaster	24m	11m
3	MSNBC	Broadcaster	6m	5m
4	ABC News	Broadcaster	18m	16m
5	New York Times	Newspaper	55m	4.5m

42% of those that named accounts mentioned mainstream news brands (58% cited other accounts including alternative media, influencers, politicians)

Q12_Social_sources_2024_Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok = 498. Lists based on 1427 mentions (604 mainstream and 821 alternative).*

Mainstream news brands and journalists struggle to cut though on TikTok. Alternative news accounts tend to be more prominent, such as @underthedesknews which features creator V Spehar presenting news updates from a lying down position – to contrast with the formulaic 'over the desk' approach on mainstream TV. The account has over 3 million subscribers with content aimed at explaining current events and news for younger audiences.

BIG ON YOUTUBE



The Young Turks (TYT): Long running progressive news commentary show that also appears on selected streaming TV channels.

BIG ON TIKTOK

Under the Desk News: Vitus 'V' Spehar is a TikToker that has become a go-to source for GenZ and Millennials for news.

Other widely mentioned accounts include celebrities, businessmen, politicians, and other public figures. Elon Musk regularly posts content on subjects such as free speech, AI, and the failings of mainstream media to his 150 million followers. Donald Trump has 65 million followers on X and 6.5 million on Truth Social.

UNITED KINGDOM

In the United Kingdom, traditional news brands established an early and strong presence in social media networks such as Twitter (X) and Facebook, but have been slower to adapt to newer networks. This has opened the door for alternative voices and news creators in networks such as Instagram and TikTok that have become key channels for under 35s.

When analysing our open responses overall we find that, unlike the United States, it is mainstream media brands such as the BBC and Sky, rather than alternative accounts, that still gain most attention, especially on X and Facebook. These big brands are more challenged on YouTube and TikTok by a range of youth-orientated outlets such as Politics Joe, LADbible, and TLDR – and also by a range of more partisan political outlets such as Novara Media – as well as individual creators.

MOST MENTIONED NEWS BRANDS - UK

	Brand name	Type	Followers	
1	BBC News	Broadcaster	X 15m	YouTube 16m
2	Sky News	Broadcaster	X 8.5m	YouTube 7.4m
3	The Guardian	Newspaper	X 10.8m	YouTube 6m
4	ITV News	Broadcaster	X 2.6m	YouTube 2.9m
5	Politics Joe	Digital born	X 470k	TikTok 500k

57% of mentions were for mainstream or news brands and journalists, 43% for other accounts including alternative news, influencers celebrities and politicians.

Q12_Social_sources_2024_Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok = 362. Note: Lists based on 943 mentions (537 mainstream, 405 alternative).*

When it comes to our list of top ten individual accounts, however, we also find many more journalists from mainstream media brands than in the United States. Topping the list is James O'Brien (LBC/Global), who has been particularly effective on YouTube and TikTok with outspoken, smartly packaged video clips from his radio show regularly going viral. Robert Peston, political correspondent from traditional broadcaster ITV and an early adopter of social media, is in second place. Also represented is former CNN, ITV, and TalkTV host Piers Morgan who recently took his eponymous Uncensored show online-only to get round what he calls the 'unnecessary straitjacket' of TV schedules.

As in the United States, there is a clear absence of women in the most-mentioned list. Partisan perspectives are provided, on the left, by columnist and author Owen Jones and on the right by TV hosts from GB News. These include Nigel Farage, former leader of the UK Independence Party (UKIP) and Neil Oliver, whose controversial views on lockdowns and vaccinations have led to complaints to the broadcast regulator Ofcom.[31]

MOST MENTIONED INDIVIDUAL NEWS-RELATED ACCOUNTS - UK

	Personality name	Known for	Main platform	Followers
1	James O'Brien	Radio talk show (LBC)	X, YouTube	1.2m (X), 717k (YT)
2	Robert Peston	News and comment (ITV)	X	1.3m (X)
3	Joe Rogan	Podcaster/conservative chat	YouTube	15m (YT)
4	Piers Morgan	Outspoken talk show	X, YouTube	8.7m (X), 2.45m (YT)
5	Owen Jones	Left leaning commentator	X, YouTube	1.1m (X), 500k(YT)
6	Martin Lewis	Personal finance expert	X, TikTok	2.7m (X), 845k TikTok
7	Russell Brand	Monologues, libertarian	YouTube	6.75m (YT)
8	Neil Oliver	Monologues, TV host	X, YouTube	400k (X), 235k (YT)
9	Nigel Farage	Broadcaster/politician	X, Facebook	1.8m (X), 1.2m (FB)
10	David Ornstein	Sports transfer talk	X	2.7m (X)

Q12_Social_sources_2024_ Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok = 362. Note: Lists based on 943 mentions (537 mainstream, 405 alternative).*

Comedian Russell Brand attracts an eclectic crowd for his outspoken, libertarian, and anti-mainstream media views expressed mainly via YouTube and Rumble. Sports journalists David Ornstein and Fabrizio Romano, both with a reputation for football transfer scoops, are widely followed, as are others with specialist knowledge such as Dan Neidle, a former high-profile lawyer who breaks stories about dodgy tax affairs of the rich and famous.[32] Influencer Dylan Page, 25, operates what he claims is the biggest English-language news account on TikTok (10.8m followers). Celebrities, such as BBC football presenter and podcast entrepreneur Gary Lineker (9m followers on X) tweet from time to time about politics and refugees. Elon Musk's tweets are also widely followed in the UK.

BIG ON YOUTUBE

Politics Joe: Accessible, hard hitting, often longer, videos aimed at U35s. 523,000 subscribers.

BIG ON TIKTOK

Dylan Page: Covers serious and lighter issues relevant to young audience (e.g. gaming, politics, bizarre stories).

FRANCE

In France, we find mainstream media challenged on social and video platforms by a range of alternative media including a number of young news influencers. Head and shoulders above the others is YouTuber and podcaster Hugo Travers, 27, known online as Hugo Décrypte, (literally Hugo Deciphers … the news). With 2.6 million subscribers on his main channel on YouTube and 5.7 million on TikTok, he has become a leading news source for young French people.

In our survey data, Décrypte received more mentions than *Le Monde*, *Le Figaro*, and *Liberation* combined. His followers had an average age of 27, around 20 years younger than many other news brands. Travers regularly interviews top politicians and global figures such as Bill Gates. The social media generation 'won't start reading a newspaper or watching the news on TV at 30', he says.[33]

[31] Oliver was cleared by Ofcom over suggestions that he had materially misled the audience after suggesting that vaccines led to turbo-cancer with young people. His live show was subsequently moved online. https://www.independent.co.uk/news/uk/home-news/gb-news-coronavirus-conspiracy-b2492164.html
[32] https://www.youtube.com/watch?v=9WqKPMq1pRQ
[33] Hugo Travers interview with the *New York Times*, June 2022. https://www.nytimes.com/2022/06/27/world/europe/france-politics-news-youtube.html

Youth-focused news brands such as Brut and Konbini have also built large audiences via social and video distribution. Brut has 2.1 million followers on YouTube, 3.8 million on Instagram, and 6.3 million on TikTok, with Konbini a little way behind. This level of engagement highlights the weakness of many traditional French news brands, which still primarily cater for older elites and have been slow to innovate through social platforms.

Travers interviews French President Emmanuel Macron in 2023

This dynamic has also spawned a wave of ideologically motivated investigation sites such as Le Media, Blast, and Pure Politique, which often criticise traditional news organisations for underplaying issues such as corruption, media ownership, and ecology. Most of these sites are co-operatives and rely on crowdfunding.

MOST MENTIONED INDIVIDUAL NEWS-RELATED ACCOUNTS - FRANCE

	Personality name	Known for	Main platform	Followers
1	Hugo Décrypte	Political interviews, explainers	YouTube, TikTok	2.6m (YT), 5.8m (TikTok)
2	Pascal Praud	Right-leaning commentator	X	317,000 (X)
3	Hugo Clement	Social and environmental issues	Instagram, TikTok	1.3m (IG), 868k (TikTok)
4	Salomé Saqué	Youth, environment issues	Instagram, X	273k (IG) , 204k (X)
5	Éric Zemmour	Commentator, far-right politician	X	475,000 (X)

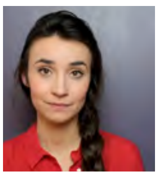
Q12_Social_sources_2024_Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok = 365. Note: Lists based on 864 mentions (413 mainstream, 451 alternative).*

Protecting the environment has become an important theme for alternative voices. Hugo Clément (32) and Salomé Saqué (28) are two prominent alternative voices, who have built their ecological reputations through social media but now appear regularly on mainstream media.

Meanwhile many older, male, right-leaning commentators who built their careers via broadcast, such as Pascal Praud and former presidential candidate Éric Zemmour, are extending their influence through like-minded and mostly older communities on X and Facebook.

YOUNG INFLUENCERS

Hugo Clément



Salomé Saqué

OLDER INFLUENCERS

Éric Zemmour

Pascal Praud

MOST MENTIONED NEWS BRANDS - FRANCE

	Brand name	Type	Followers	
1	Brut	Digital-first (youth focused)	TikTok 6.5m	YouTube 2m
2	Le Monde	Newspaper	X 10.8m	YouTube 1.7m
3	Mediapart	Digital-first (investigations)	X 3.1m	Instagram 1m
4	BFMTV	Broadcaster	X 4m	YouTube 1.9m
5	Le Parisien	Newspaper	X 3.3m	YouTube 1.4m

48% of mentions were for mainstream or news brands and journalists, 52% for other accounts including alternative news, influencers celebrities and politicians.

Q12_Social_sources_2024_Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok = 365. Note: Lists based on 864 mentions (413 mainstream, 451 alternative).*

ARGENTINA

Latin American nations are some of the highest users of social and video networks in our *Digital News Report*, as well as some of the fastest adopters of new networks. In Argentina, we find that mainstream brands and their journalists continue to attract most attention across a wide range of networks when it comes to news. Instagram plays a far bigger role than in the United States or Europe, while YouTube and TikTok are growing fast.

In Argentina, we find the top named individuals are all men, including many popular radio or TV hosts whose content has been repackaged for social channels. Mate con Mote, a YouTuber and TikTok influencer, makes videos about politics with humour and social commentary.

MOST MENTIONED INDIVIDUAL NEWS-RELATED ACCOUNTS - ARGENTINA

	Personality name	Known for	Main platform	Followers
1	Jorge Lanata	Radio host and commentator	YouTube	429k (YT)
2	Jonatan Viale	TV News anchor (TN)	X	1.1m (X)
3	Eduardo Feinmann	Radio and TV host, columnist	X, Instagram	1.1m (X), 439k (IG)
4	Alejandro Fantino	TV and radio host	X	2.9m (X)
5	Mate con Mote	Influencer, commentator	YouTube, TikTok	1.39m (YT), 1.3m (TT)

Q12_Social_sources_2024_Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok = 590. Note: Lists based on 1772 mentions (884 mainstream, 888 alternative).*

In keeping with Argentina's polarised politics, we also find regular mentions of right-wing, left-wing, and libertarian influencers. El Presto is a COVID denier who encouraged public gatherings during the Argentine lockdowns and has 460,000 followers on YouTube. Iñaki Gutiérrez is a 22-year-old student who set up and runs the TikTok account of the Argentinian president Javier Milei.

He's an influencer in his own right with a big following on Instagram (550,000), TikTok (500,000), and X (279,000). He says his views represent the views of many young people who feel let down by the politics of the left.

Iñaki Gutiérrez set up and runs the TikTok account of the Argentinian president Javier Milei.

MOST MENTIONED NEWS BRANDS - ARGENTINA

	Brand name	Type	Followers
1	TN (Todo Noticias)	Broadcaster	X 6.1m, YouTube 4.1m
2	La Nacion	Newspaper	X 4.1m, YouTube 2.6m
3	C5N	Broadcaster	X 3.1m, YouTube 2.35m
4	Infobae	Digital first	Instagram 2.8m, TikTok 2.6m
5	Telefe	Broadcaster	X 3m, Instagram 4.7m

50% of mentions were for mainstream or news brands and journalists, 52% for other accounts including alternative news, influencers celebrities and politicians.

Q12_Social_sources_2024_Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok = 590. Note: Lists based on 1772 mentions (884 mainstream, 888 alternative).*

A number of our respondents also mentioned paying attention to the social accounts of Milei himself (5.6m on Instagram and 2.1m on TikTok) and to those of the main presidential spokesman. But these numbers are dwarfed by footballer Lionel Messi who was regularly cited and has amassed 500 million followers on Instagram alone.

BRAZIL

Brazil follows a similar pattern to Argentina with the biggest news brands such as Globo, Record, and CNN Brasil working with TV hosts to build profiles and influence in social channels. Many long-standing (or former) broadcasters, often with a reputation for conservative political commentary, have extended their influence through a range of social channels. Alexandre Garcia, who heads the list, was accused of spreading false information about the COVID-19 pandemic, with hundreds of videos removed from his YouTube account.[34] He is a supporter of former President Jair Bolsonaro.

One distinctive feature of Brazilian social media is the prominence of celebrity journalists and influencers. Leo Dias and Hugo Gloss have Instagram followings of more than 15 million but they combine this with their own websites as well as working closely with traditional media portals to extend their reach. Fashion- or music- based influencers such as Virgínia Fonseca (46m followers on YouTube) and Carlinhos Maia (30m) are also widely mentioned in our data though they rarely discuss political or social issues. They mostly make money from advertising and product endorsements.

MOST MENTIONED INDIVIDUAL NEWS-RELATED ACCOUNTS - BRAZIL

	Personality name	Known for	Main platform	Followers
1	Alexandre Garcia	Journalist, political commentator	X, YouTube	4.2m (X), 2.7m (YT)
2	Leo Dias	Celebrity journalist	Instagram	15.6m (IG)
3	Augusto Nunes	Conservative commentator	X	2.4m (X)
4	Hugo Gloss	Entertainment journalist/influencer	Instagram, Facebook	21.1m (IG), 6.6m (FB)
5	Datena	Hosts a TV show on crime	X	1.1m (X)

MOST MENTIONED NEWS BRANDS - BRAZIL

	Brand name	Type	Followers
1	Globo (incl. G1)	Broadcaster	X 15m, Instagram 3m
2	Record (incl. R7)	Broadcaster	X 5.1m, Instagram 5.6m
3	CNN Brasil	Broadcaster	YouTube 4.8m, X 4.5m
4	UOL	Digital first portal	YouTube 4m, X 2.8m
5	Jovem Pam	Broadcaster	X 2.2m, YouTube 7.92m

38% of mentions were for mainstream or news brands and journalists, 62% for other accounts including alternative news, influencers celebrities and politicians

Q12_Social_sources_2024_Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok = 726. Note: Lists based on 2257 mentions (854 mainstream, 1403 alternative).*

As in Argentina, Brazilian politicians have blazed a trail on social media, allowing them to build direct connections with voters and to some degree bypass scrutiny by traditional media. Current President Lula da Silva has 13 million followers on Instagram; Bolsonaro has 12 million on X.

CONCLUSION

It is extremely difficult to measure the extent of news being consumed in social and video networks given the range of accounts and subjects being discussed, but our approach has helped to understand a little more about some of the most influential accounts, the balance of attention between mainstream and other news brands and individual influencers and personalities.

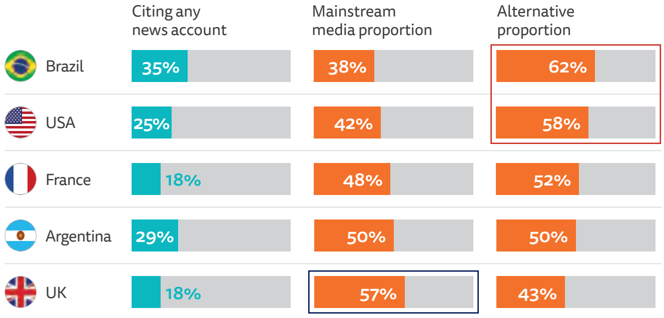
Looking across our five selected countries we find that news-related accounts of any kind are cited much more often in Brazil, the United States, and Argentina than they are in the UK or France. This is in line with greater use of social media for news in those countries.

In the United States and Brazil we also see a greater number of alternative news or individual accounts cited as opposed to mainstream news brands and journalists, suggesting that the trend towards news creators and influencers is far more developed in these large markets.

[34] https://www.portaldosjornalistas.com.br/rafael-colombo-deixa-quadro-da-cnn-por-conflito-com-alexandre-garcia/

In the United Kingdom, by contrast, mainstream media brands and journalists account for the majority of citations. There is a more even split in Argentina and France, where the most mentioned account overall is a young news creator.

PROPORTION MENTIONING ANY ACCOUNT AND THE SPLIT BETWEEN MAINSTREAM VS OTHER ACCOUNTS - SELECTED MARKETS



Q12_Social_sources_2024_Mainstream/alternative. You said that you pay attention to mainstream/alternative news outlets or journalists for news on social media. Can you name any of the accounts you follow or pay attention to? Please name up to three. *Base: Randomly selected news users on Facebook, X, YouTube, Instagram, Snapchat, and TikTok in Brazil = 726, USA = 498, France = 365, Argentina = 590, UK = 362. Note: proportion of citations derived from the number mentions in each category (i.e. derived from an audience view of what accounts are mainstream media and which are from alternative news, influencers, celebrities etc.).*

Digging further into the content itself, we find that many of the most cited accounts belong to partisan political commentators (from left and right) producing content that, on the one hand, often stands outside what would normally be published by the news media but who, on the other hand, often have worked for many years in legacy media. Some of these creators have been criticised for factual inaccuracies and for spreading conspiracies or misleading narratives, even as they are highly trusted by those who share their political views. Many of the commentators now committed to online distribution emphasise their ability to speak freely (e.g. Tucker Carlson Unfiltered, Piers Morgan Uncensored), setting themselves up as an alternative to a mainstream media that they say 'suppresses the truth' or is driven by 'elite and corporate interests'. But any increase in the range of views is not matched by diversity, with the most popular accounts mostly white and male, in the five countries studied.

A second important trend is the popularity of news creators and influencers that speak to younger audiences, mostly using video formats. In France, Hugo Décrypte is blazing a trail in trying to make news more accessible and entertaining, along with V Spehar in the United States and Dylan Page in the UK. Brands such as Brut, Politics Joe, and TLDR News are engaging a large number of under 35s using younger hosts, as well as a different agenda, including more content about climate, social justice, and mental health.

In some countries, especially in Latin America, we also see evidence that populist politicians are building attention across a range of social networks including Instagram, X, YouTube, and TikTok, enabling them to get their messages out directly to supporters, effectively bypassing traditional media. Completing the picture are celebrities and social media influencers whose followings vastly outstrip journalists and politicians, even if they rarely get drawn into contentious subjects such as politics.

The vitality of alternative voices in social and video networks in some ways highlights perceived weaknesses of news organisations on such issues as trust, diversity, and digital storytelling – at least with some people. In that sense, traditional media have much to learn on how to better engage audiences in this increasingly complex and competitive space.

SECTION 3

SECTION 3

Analysis by Country and Market

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

These include an overview of consumption in each market, including details of the most popular news brands – traditional and online. The pages also contain statistics about the different sources of news over time, the role of different social networks, and levels of payment for online news. Information is drawn from the 2024 Digital News Report survey using the methodology outlined on page 6, with the exception of population and internet levels which are drawn from *Internet World Statistics*[35] and press freedom scores from Reporters without Borders.[36]

Data from India, Kenya, Nigeria, and South Africa are representative of younger English-speakers rather than the national population. The survey was fielded in English in these markets (respondents had the option of selecting Hindi in India and Swahili in Kenya, but the majority selected English), and restricted to ages 18 to 50 in Kenya and Nigeria. In some other markets, where internet penetration is lower, our data often represent younger and more affluent groups – even if they meet other nationally representative quotas. For all these reasons, one should be cautious in comparing some data points across markets where we know these limitations apply. In a few markets we do not ask certain questions (such as on paying for news and podcasts) because sample differences could lead to misunderstandings or misleading comparisons. We have also signalled important details about samples in a short note on the country page, where relevant. We have ordered the countries and markets by geography (Europe, Americas, Asia-Pacific, and Africa) and within each region countries are then ordered alphabetically – with the exception of the UK at the start of the Europe section and the United States at the start of the Americas.

Previously published data from Bulgaria, Indonesia, Kenya, Romania, and Nigeria in 2021 contained a very small number of respondents that should have been excluded during data processing. We have corrected this error in 2024, meaning that some data points on some line charts in these countries have shifted by 1pp.

Finally, we reformulated questions about the use of different devices for any purpose and for news, asking about each device separately to ensure greater accuracy of response. Data will not be directly comparable to previous years and we have indicated this on the charts in question.

[35] https://www.internetworldstats.com/
[36] https://rsf.org/

SECTION 3

SECTION 3

Analysis by Country and Market
Europe

Population	68m
Internet penetration	95%

UNITED KINGDOM

The UK media scene is characterised by strong public and commercial broadcasters and a competitive and outspoken national press. But both public and private funding models are under pressure as audiences shift their attention further towards digital channels. Publishers are hoping for a traffic boost following summer elections and a new government.

Media groups continue to suffer from a combination of rising costs and lower than expected advertising revenues. Reach plc, owners of the *Daily Mirror*, *Express*, and *Star*, along with around 200 local titles, announced 450 redundancies in November, the third round of job cuts in a year. Regional print sales have been particularly hard hit – down 19% in the second half of 2023[37] – while online audiences have suffered from a slump in social media referrals. National tabloids and mid-market papers are also struggling, with the *Mail*, which operates one of the biggest English-language websites in the world, planning job cuts and new working practices across print and online. Meanwhile publishers of the *Mail*, the *Sun*, and the *Mirror* are grappling with costs from ongoing legal cases related to historic phone hacking and other alleged unlawful activities targeting public figures including Prince Harry.[38]

Most upmarket newspapers in the UK have shifted to an online subscription model as they actively prepare for the end of the print era. *The Times* and *Sunday Times*, part of Rupert Murdoch's newspaper stable, has amassed 558,000 digital-only subscribers, partly helped by a recent focus on international growth. The *Guardian* has over 1 million paying supporters, but its membership growth has slowed and a sharp drop in advertising revenue in the last six months of 2023 led to a projected loss of £39m. Despite this, it launched a European edition with 10 new editorial roles as well as a new food app (Feast) selling at £2.99 a month. The Telegraph Media Group hit its ambitious target of 1 million subscribers, partly off the back of heavily discounted subscriptions, but its future remains uncertain. The proposed £600m sale of the *Telegraph* and its sister title the *Spectator* to a consortium backed by the United Arab Emirates (UAE) met hostility from politicians opposed to foreign governments owning a UK newspaper that is particularly influential within the Conservative party. Other potential owners are waiting in the wings, including controversial billionaire hedge fund investor Sir Paul Marshall, who already holds a major stake in right-leaning TV news channel GB News. The saga highlights concern that news media are increasingly being viewed as a way to buy political influence.

Meanwhile, losses at GB News ballooned to £42m at the same time as it paid big money for right-leaning presenters, many of them serving or former politicians such as Sir Jacob Rees-Mogg MP and Nigel Farage. Broadcasting regulator Ofcom found GB News repeatedly breached its impartiality rules and many advertisers continue to boycott the channel.[39] Our survey shows a small but growing audience (7% weekly reach) but low levels of public trust. Rival opinion-based broadcaster Talk TV has also been in trouble with the regulator and amid mounting losses is switching to online-only output in the summer.

Economic and audience pressures are also bearing down on traditional broadcasters. Channel 4, which is state-owned but commercially funded, plans to cut around 200 jobs, axe underperforming linear channels, and focus more on digital – faced with competition from streaming platforms. The BBC has had another difficult year with the government imposing a smaller than expected licence fee increase and further questions over its mission in a digital age. Looking to the future, it is looking to build its own artificial intelligence models and is considering selling access to its vast archives to Big Tech.

BBC News remains dominant offline and online, although Digital News Report data show that reach has fallen over time, especially with younger audiences. The Gaza conflict has tested the BBC's approach to impartiality, with coverage attracting criticism from both sides. With an election due in 2024, and amid concerns about potential for AI-generated fakes, the BBC has been stepping up its attempts to fact-check statements, videos, and images, under the banner BBC Verify.

Finally, a sign of the times is how a fictional TV drama (*Mr Bates vs the Post Office* from ITV) was able to move both the public and politicians about the wrongful convictions of British postmasters. Measures to resolve the historic injustice have been widely welcomed but the drama's success has also highlighted the diminished power of journalists, since news media had reported the scandal for years, largely without results.

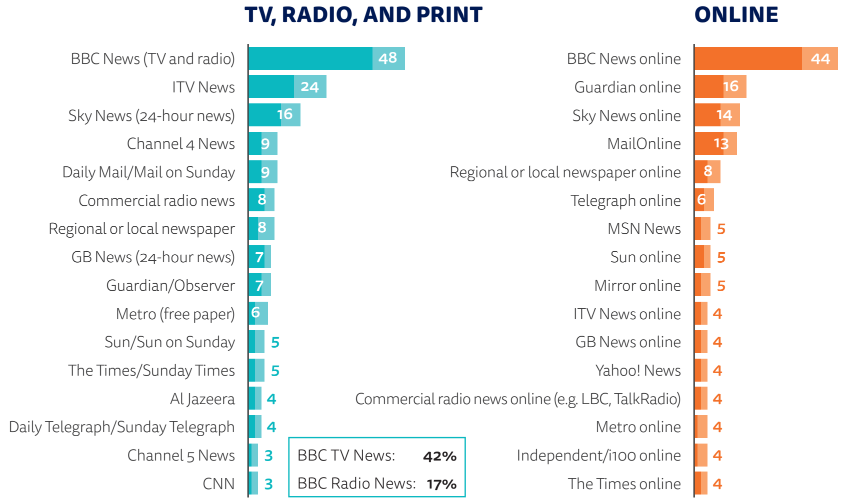
Nic Newman
Senior Research Associate, Reuters Institute

[37] https://pressgazette.co.uk/media-audience-and-business-data/media_metrics/uk-regional-daily-newspaper-circulation-print-2023-abc/
[38] https://www.independent.co.uk/news/uk/home-news/prince-harry-privacy-court-case-media-b2531444.html
[39] https://pressgazette.co.uk/media-audience-and-business-data/media_metrics/uk-regional-daily-newspaper-circulation-print-2023-abc/

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

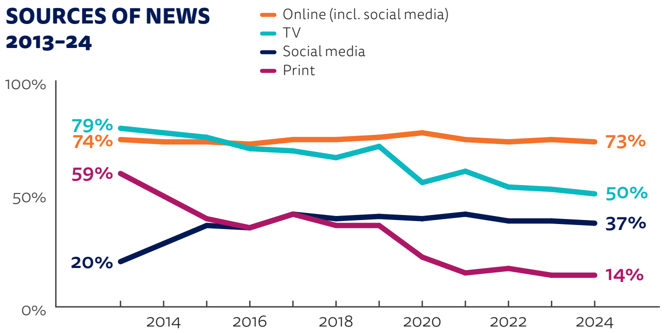


8% pay for **ONLINE NEWS**

CHANGING MEDIA

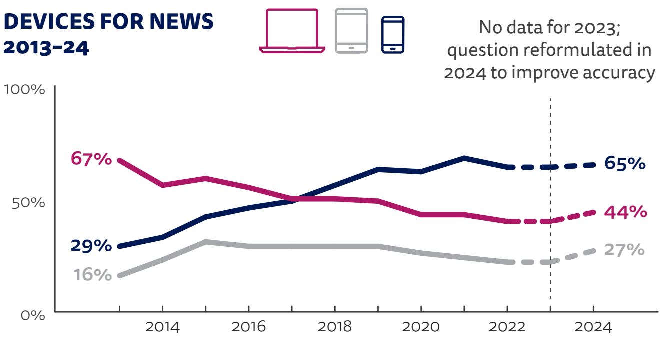
Audiences for traditional news sources like TV and print have fallen significantly over the last decade, with younger groups preferring to get their news online or via social media.

SOURCES OF NEWS 2013–24



DEVICES FOR NEWS 2013–24

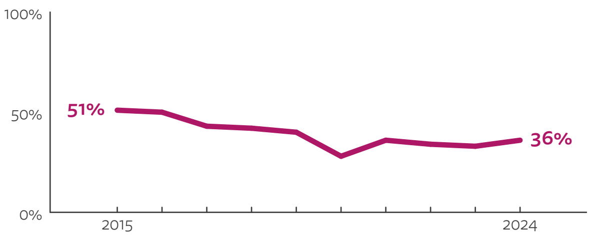
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Overall trust in news is marginally up this year, but remains around 15 percentage points lower than before the Brexit referendum (2016). Public broadcasters such as the BBC, Channel 4, and ITV remain the most trusted news brands. More opinionated news brands tend to have lower trust levels in our survey, along with tabloid newspapers.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

36%
OVERALL TRUST
25/47 markets

RSF REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2024**	Score: **77.51**	**23**/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
BBC News	62%	16%	22%
Channel 4 News	59%	26%	15%
Daily Mail/MailOnline	25%	24%	51%
Daily Mirror	22%	30%	48%
Daily Telegraph	41%	32%	26%
Financial Times	57%	31%	11%
GB News	29%	27%	44%
Guardian	52%	29%	19%
Independent	49%	34%	17%
ITV News	59%	25%	15%
Regional or local newspaper	53%	32%	15%
Sky News	53%	29%	19%
Sun	15%	22%	63%
TalkTV	21%	41%	38%
The Times	49%	31%	20%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	17%	(-)	63%
2	X (formerly Twitter)	14%	(+1)	25%
3	YouTube	13%	(+3)	53%

Rank	Brand	For News		For All
4	WhatsApp	10%	(+1)	68%
5	Instagram	8%	(+2)	38%
6	TikTok	4%	(+1)	15%

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

Population	9.1m
Internet penetration	88%

AUSTRIA

The Austrian news market is characterised by a strong public broadcaster (ORF), commercial broadcasters, and a wide range of national and local newspapers, which are adapting to digital challenges at varying speeds. Public subsidies, including advertising spending by public institutions, play an important role in the viability of some news organisations, but also exacerbate the tensions between commercial and public service providers.

The ORF, Austria's public service and largest media organisation, has undergone significant changes following the enactment of the new ORF Act in July. One major change is the move from device-based financing to a household fee system. The fee collected by the ORF from each household is approximately 20% lower, but the base should expand by approximately 400,000 households. This adjustment not only addresses a ruling from the Constitutional Court (VfGH) mandating a new financing mechanism but also seeks to mitigate concerns from other quality news media regarding ORF's perceived unfair advantage in digital audience competition spurred by public funding.

Consequently, ORF's website has revamped its content structure, with text contributions capped at 350 per week and limited to 30% against 70% video content. Additionally, ORF Director General Weißmann has initiated cost-cutting measures to save approximately 10% over three years or €300m by 2026. Two specialised portals – for classical music and films/series – have been closed. The newly rebranded 'ORF On' on-demand streaming platform was launched to replace ORF TVthek, which is closing down as a result. Despite these changes, the *Zeit im Bild* (ZiB) news programme has achieved significant milestones by surpassing 1 million followers on Instagram and half a million on TikTok.

Data from the Austrian Audit Bureau of Circulations (ÖAK), shows that sales of daily newspapers continue to decline, despite a modest rise in sales of e-papers. Against this challenging background, some Austrian news organisations continued to adapt and innovate.

For example, the editorial teams of the free newspaper *Heute* and the online platform heute.at have been merged, and both *Heute* and the platform vol.at have begun delivering features such as a Morning Briefing and news updates and overviews via WhatsApp.

Russmedia, the publisher of the regional newspaper *Vorarlberger Nachrichten*, is working with OpenAI to equip its employees with a digital assistant which it hopes will free up journalists to do more research and enable the development of more targeted advertising. As part of the Google News Initiative, the Austria Press Agency (APA) has been developing new projects with the internet giant. These projects include APA Signals, a monitoring tool tailored to assist editorial teams in managing the deluge of information and efficiently categorising content and sources, and Datenpunkt Klima, focused on improving coverage of climate-related topics.

The decision to close the print edition of the *Wiener Zeitung*, recognised as the world's oldest continuously published daily newspaper, from June 2023, and move online with a reduced editorial team, met with mixed reactions. This transition was prompted by government legislation removing the obligation on companies to publish corporate announcements in the paper. The government then committed to giving €13.5m per annum to Wiener Zeitung GmbH., of which €7.5m was for editorial while €6m was directed to Media Hub Austria for practical journalism training. Following the closure of the print edition, a group of former *Wiener Zeitung* journalists created *Das Feuilleton*, a new monthly printed newspaper, which thanks to successful crowdfunding, started publication on 1 December 2023. The newspaper *Kurier* has announced plans to lay off up to 20% of its staff.

An analysis of 103 Austrian-produced podcasts covering 1,074 hours of audio material in the first half of 2023 from media analysts APA-Comm reveals that politics and economics dominate the content, with 26% of episodes focused on political events and 22% on the economy and finance. In 2022, the federal government collected €96m through the digital tax, introduced in 2020, which targets internet advertising services not already covered by a pre-existing tax. The proceeds contribute to the Fund for the Promotion of Digital Transformation, endowed with €20m annually. In 2023, the digital tax generated €103m and the Austrian Regulatory Authority RTR has allocated all of that to support 115 projects.

ProSiebenSat.1Puls4 Group introduced the streaming platform Joyn, to bolster the domestic media landscape against international platforms. Meanwhile, the Czech billionaire Renáta Kellnerová increased her stake in ProSiebenSat.1, reaching around 15%, while the German broadcasting group under new CEO Bert Habets is pursuing closer collaboration with major shareholder MediaForEurope (MFE) owned by the Berlusconi family, in advertising, technology, and content.

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

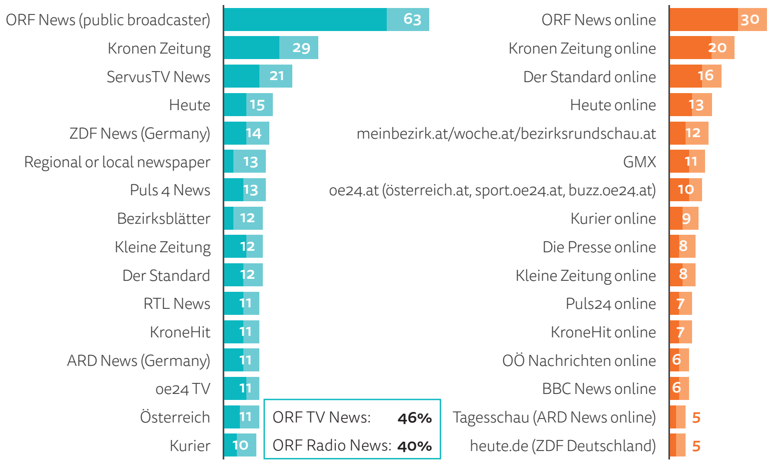
WEEKLY REACH OFFLINE AND ONLINE

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

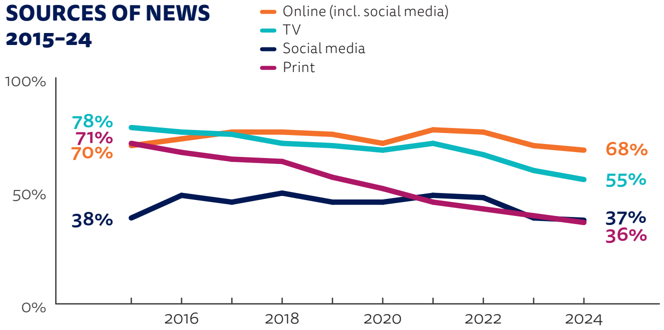
14% pay for **ONLINE NEWS**



CHANGING MEDIA

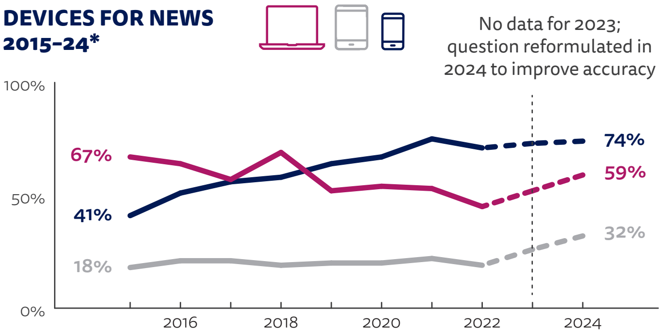
Austrians still have one of highest rates of daily newspaper readership in the world but the proportion accessing weekly has halved since 2015. TV audiences are down overall, particularly with younger people.

SOURCES OF NEWS 2015–24



DEVICES FOR NEWS 2015–24*

No data for 2023; question reformulated in 2024 to improve accuracy

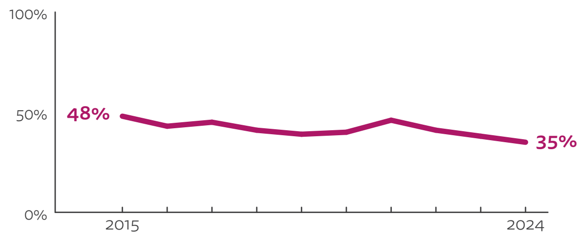


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

The percentage of respondents who expressed trust in the news fell to just below 35%, the lowest level recorded for the Austrian market since its inclusion in the report in 2015. Trust has fallen by 11 percentage points since its high point reported in 2021, at the height of the COVID-19 pandemic.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

35% OVERALL TRUST 26/47 markets

RSF REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 74.69	32/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
ATV	37%	26%	37%
Der Standard	58%	17%	25%
Die Presse	56%	19%	25%
Heute	29%	23%	48%
Kleine Zeitung	46%	25%	29%
Kronen Zeitung	40%	20%	40%
Kurier	49%	23%	28%
NEWS	39%	28%	33%
oe24	35%	23%	42%
OÖ Nachrichten	45%	29%	26%
ORF News	60%	16%	24%
Puls 4 News	43%	26%	30%
Regional or local newspaper	54%	25%	21%
Salzburger Nachrichten	49%	27%	25%
Servus TV News	52%	20%	28%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

33% listened to **PODCASTS** in the last month

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	YouTube	20%	(-1)	56%
2	Facebook	20%	(-4)	49%
3	WhatsApp	18%	(-2)	69%
4	Instagram	11%	(-2)	35%
5	Facebook Mesenger	4%	(-)	20%
6	TikTok	4%	(-2)	14%

Population	11.7m
Internet penetration	92%

BELGIUM

Belgium has two distinct media markets: French-speaking Wallonia and Flemish-speaking Flanders. Established news media are still pursing further consolidation, while room for small players old and new remains limited.

In Belgium, industry figures from the Centre of Information on the Media (CIM)[40] show a mixed picture for the combined online and offline reach of established news media brands. In Flanders, local paper *Het Belang van Limburg* and financial paper *De Tijd* saw an increase of around 7%, regional paper *Gazet van Antwerpen* of 3%. DPGMedia's *Het Laatste Nieuws* and *De Morgen* remain stable, while the Mediahuis titles *Het Nieuwsblad* and *De Standaard* decrease with around 6% and 9% respectively.

On the French-speaking side, *L'Echo*, the sister publication of *De Tijd*, is the only one to see slight growth. All other French-language titles record significant declines. *La Libre* (-14%), *L'Avenir* (-11%), *Le Soir* (-11%), *La Dernière Heure* (-10%), and *Sudinfo* (-5%) have suffered heavy losses. We can see how Belgium's two main news markets are fundamentally different, which is also reflected in the gap for print consumption in Digital News Report data. In Flanders, we can observe a pattern of behaviour that is more typical of northern Europe: overall, the population remains very attached to the written press, whereas in southern Europe there is a preference for broadcast media.

Profitability in both markets continues to be affected by declining advertising revenues, rising costs, most notably for energy, paper, and labour, and audiences moving to online news. The latest casualty of these combined forces was the free daily *Metro*, distributed in both Dutch and French in public transport stations, whose owner Groupe Rossel closed it in October 2023 because the paper was loss making. New players do emerge, such as the snappy, meme-inspired Instagram Dutch-language account @cestmocro which is popular in the Netherlands and Flanders. However, the fact that some are anonymous, and often spread misinformation and engage with the extreme right, rather illustrates the kind of news outlets that can take root in such a fragile news market.

The Belgian government's decision to end their longstanding subsidy for newspaper distribution has added to the problems. Publishers can now no longer count on home deliveries by BPost at below-market rates but will need to negotiate with commercial distribution services. They still enjoy some government support, but the total subsidy has been cut by two-thirds. The details of the new support regime, and its start date, are still being discussed, prompting concern amongst many publishers.

For legacy news organisations, the strategic response to falling domestic profit margins remains to expand their operations, in the hope of creating synergies that will in time pay off. For example, Roularta Media acquired the magazines *Happinez*, *Yoga*, *Psychologie*, and *FLOW*, and seeks to integrate these within its existing web store. Mediahuis acquired the remaining shares of its German subsidiary Medienhaus Aachen, where it had bought a 70% share in early 2022. In December 2023 DPG Media, after taking control of a major part of the Dutch newspaper market via years of acquisitions, finalised its takeover of broadcaster RTL Nederland, hoping for further synergies in terms of content production and advertising.

At some point, these synergies lead to layoffs, as happened in February 2024 when Mediahuis announced it would shed around 20 posts including some editors. 'We are evolving into a future-proof marketing organisation around specific digital expertise centres. These must make maximum use of the knowledge available across the four titles,' says CEO Koen Verwee,[41] demonstrating how digital transformation and organisational efficiencies go hand in hand. That trend may accelerate as most news outlets are currently exploring the uses of AI. This has led the Council for Journalism to produce guidelines on the implementation of artificial intelligence in journalism, underscoring the need for editorial accountability and public transparency.

Amidst this turmoil, it is reassuring that journalists still express a high degree of job satisfaction, valuing content diversity, intellectual stimulation, and autonomy. However, opinions on workload are split, with a majority reporting increased duties and job insecurity. Moreover, more than half of journalists face harassment at work, with verbal aggression being the most common.[42] A significant proportion encounters various forms of intimidation, with women particularly affected by sexual harassment and discrimination. Sadly, most of this behaviour goes unreported.

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

[40] Centre for Information on the Media, 'New Reach Data for the Press', 17 Oct. 2023. https://www.cim.be/nl/nieuws/2162-nieuwe-bereikscijfers-voor-de-pers
[41] Apache, 'Ontslagen bij Mediahuis brengen einde van papieren krant dichterbij' (19 Feb. 2024). https://apache.be/2024/02/19/ontslagen-bij-mediahuis-brengen-einde-van-papieren-krant-dichterbij
[42] CJS-ReSiC, 'Portret van Belgische journalisten 2023: weinig divers, loonkloof en geconfronteerd met grensoverschrijdend gedrag'. https://www.mediapuntvlaanderen.be/onderzoekfiches/portret-belgische-journalisten-2023

Editor's note: In a previous version of this page, we stated wrongly that Mediahuis had announced it would shed 120 posts including some editors-in-chief. As the text says now, the company is actually shedding 20 posts, including editors (not editors-in-chief).

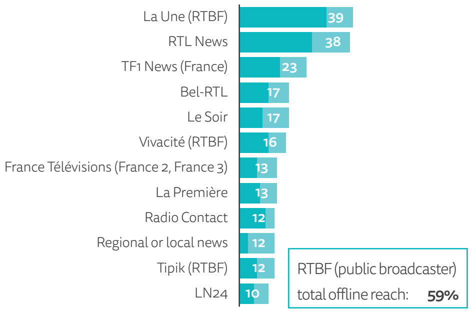
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

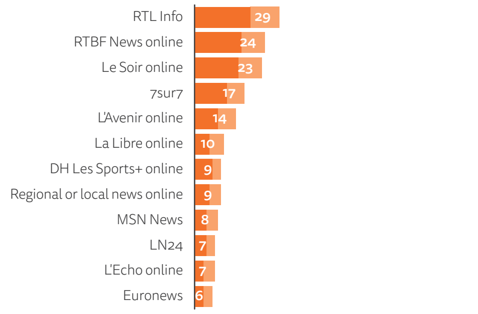
% Weekly usage

- 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

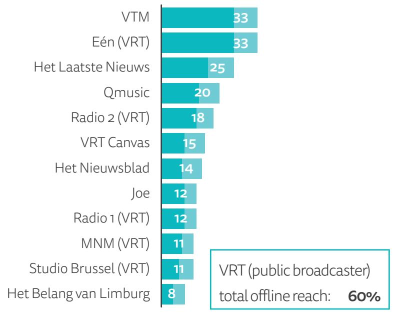
TV, RADIO, AND PRINT (FRENCH SPEAKING)



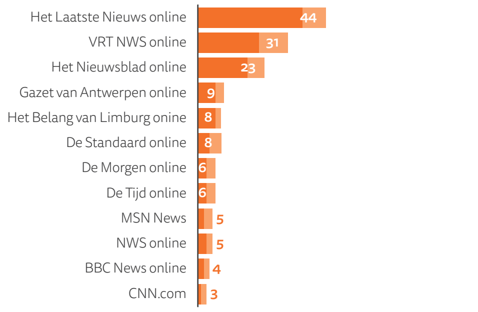
ONLINE (FRENCH SPEAKING)



TV, RADIO, AND PRINT (FLEMISH SPEAKING)



ONLINE (FLEMISH SPEAKING)



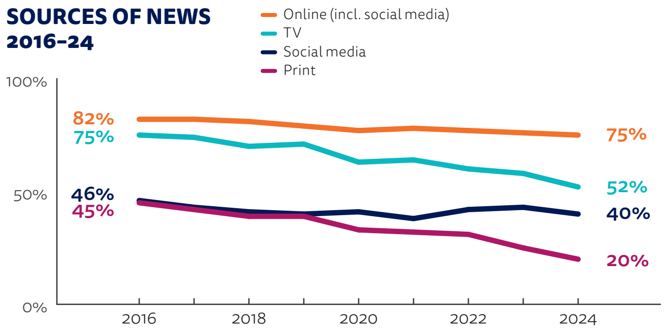
15% pay for **ONLINE NEWS**

French 14% | Flemish 15%

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

French 28% | Flemish 26%

SOURCES OF NEWS 2016–24



DEVICES FOR NEWS 2016–24

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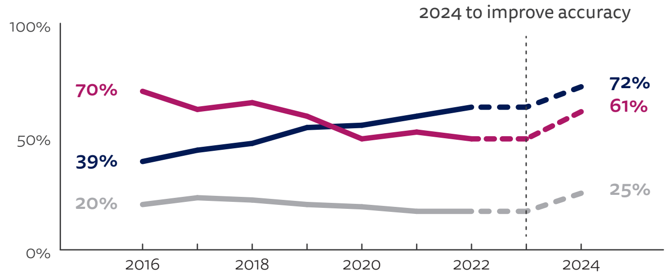
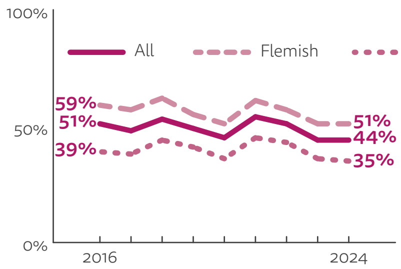


TRUST IN NEWS 2016–24



44% OVERALL TRUST 14/47 markets

Flemish-speaking Flanders (51%) and French-speaking Wallonia (35%) continue to feature a significant trust gap. This gap also translates to brand trust scores, which are significantly higher and more resilient in Flanders than in Wallonia. In both markets, the respective public broadcasters VRT and RTBF remain the most trusted news sources.

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	32%	(-6)	65%
2	YouTube	16%	(-1)	49%
3	WhatsApp	14%	(-1)	56%
4	Instagram	14%	(-)	39%
5	Facebook Messenger	12%	(-)	47%

PUBLIC OPINION ON BRAND TRUST

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

FRENCH

Brand	Trust	Neither	Don't Trust
7sur7	43%	37%	20%
Bel-RTL	53%	27%	19%
France 2	56%	32%	13%
La Dernière Heure	44%	35%	21%
La Libre	54%	35%	11%
La Première	59%	30%	11%
L'Avenir	47%	37%	16%
Le Soir	63%	25%	11%
Metro	38%	40%	22%
Radio Contact	47%	33%	20%
Regional or local newspaper	54%	34%	12%
RTBF News	65%	23%	11%
RTL	54%	25%	20%
TF1	55%	25%	20%
Vivacité	56%	30%	14%

FLEMISH

Brand	Trust	Neither	Don't Trust
De Morgen	67%	23%	11%
De Standaard	71%	21%	7%
De Tijd	70%	23%	7%
Gazet van Antwerpen	64%	26%	11%
Het Belang van Limburg	63%	26%	11%
Het Laatste Nieuws	67%	20%	13%
Het Nieuwsblad	68%	22%	9%
Joe FM	60%	29%	11%
NWS (@nwsnwsnws)	60%	29%	11%
Qmusic	61%	28%	11%
Radio 1	73%	20%	7%
Radio 2	72%	20%	8%
Regional or local newspaper	65%	26%	10%
VRT Nieuws	79%	14%	7%
VTM Nieuws	74%	17%	9%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

WORLD PRESS FREEDOM INDEX SCORE 2024 — Score: **81.49** — **16**/180

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

Population	6.9m
Internet penetration	70%

BULGARIA

As the poorest country in the European Union with a constantly declining population and very few people prepared to pay for news, Bulgaria offers limited business opportunities in the media sector apart from mergers and acquisitions. Each major broadcaster is owned by a telecommunications group that targets their subscribers with services focused primarily on entertainment, rather than news.

In February 2024 the United Group, a leading media conglomerate in Central Eastern Europe which owns the commercial broadcaster Nova Broadcasting Group (the top brand in terms of reach according to our research) acquired the last big independent TV provider Bulsatcom. But there are reports that United itself might be put up for sale by its major shareholder BC Partners.[43] If this happens it will be the third change of ownership for Nova Broadcasting Group in exactly five years, indicating the intense but precarious development of the media market in Bulgaria and the region. When it comes to the online advertising market, revenues are split between the leading broadcasters and major platforms such as Meta/Facebook and Alphabet/Google, leaving little for anyone else.

However, with hardly any news companies even trying to charge for news via subscriptions or membership, there is a heavy dependence on advertising revenue – both from corporate and state organisations. These pressures are exacerbated by low and declining print sales. All media groups are looking for greater efficiencies and their negotiations for advertising contracts often test the limits of editorial independence. Print media, and commercial radio stations in particular, try to lure advertisers with advertorials and other special projects or partnerships that provide positive coverage of organisations such as banks, insurers, hospitals, and even universities in return for paying for advertising pages.

Even the biggest media companies have to make editorial compromises when it comes to advertising revenues. In August 2023 one of the leading bottling companies polluted a river, effectively killing all fish downstream, but the two major broadcasters waited a couple of days to deliver the news. One never covered the admission of responsibility by the company, only reporting the remedial measures undertaken by them.

Low levels of trust in Bulgarian news are a longstanding feature and derive from a high degree of political polarisation – currently fuelled by differences over the Russia/Ukraine war – and a sense that media companies' independence is compromised for economic reasons or by businessmen with close links to politics.

Since May 2023 Bulgaria has been governed by a coalition between the former ruling GERB party led by controversial veteran Boyko Borissov and We Continue the Change, a party which built their campaign on promises to put Boyko Borissov in prison. Both parties agreed to alternate the post of Prime Minister after nine months, but the agreement collapsed in March 2024, with a new caretaker government installed and elections called for June.

Bulgaria remains a major arms supplier to Ukraine. The majority of the political elite and mainstream media support sanctions against Russia and aid for Ukraine, but a significant share of the population opposes those policies and reports low trust in Bulgaria's government and Parliament.[44] Abuses of power might help explain why. One recent example was when an adviser to the defence minister threatened staff in the emergency department of Sofia's largest hospital, demanding priority treatment of his child. The news broke when a nurse shared the story on Facebook.[45] Officials from the Ministry of Defence accused the latter of being a Russian agent, and focused their investigation on the leak before scrutinising the behaviour of the adviser.

In 2023 nearly 500,000 Bulgarians signed a petition, proposing that the adoption of the euro be put to a referendum but the constitutional court rejected this. The authorities are spending millions on a campaign to promote the euro, and that money benefits the major media companies. Meanwhile, on 31 March 2024 Bulgaria, along with Romania, became partial members of the EU's border-free Schengen area but only for travellers by air and sea, rather than by land

Traditional media have launched podcasts or platforms for online news streaming but it is the journalists with a strong personal following who attract the greatest audience. These include former mainstream journalists with independent shows holding leading positions on platforms such as YouTube, TikTok, and Patreon. Among the most successful are Martin Karbovski with his own channel, Genka Shikerova as part of Free Europe, and Peter Volgin as part of Bulgarian National Radio.

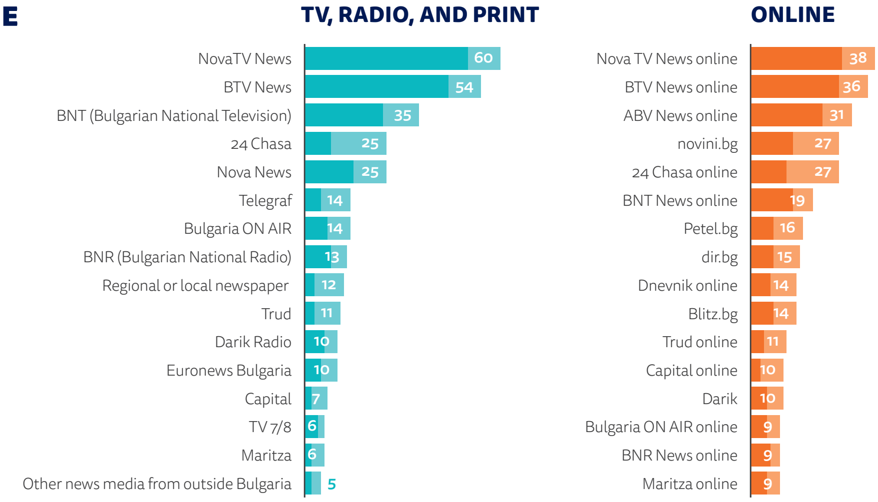
Stefan Antonov
Business Journalist and former Reuters Institute Journalist Fellow

[43] https://ionanalytics.com/insights/mergermarket/bc-partners-taps-jp-morgan-and-morgan-stanley-to-advise-on-upcoming-united-group-exit-sources/
[44] Standard Eurobarometer 100, Autumn 2023. Country Factsheet in English: Bulgaria. https://europa.eu/eurobarometer/surveys/detail/3053
[45] https://www.bgonair.bg/a/2-bulgaria/317778-tagarev-poiska-proverki-ot-ministar-hinkov-v-pirogov-po-sluchaya-mustafa-emin

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

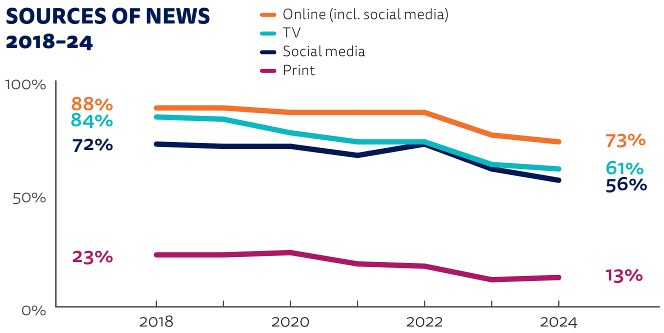


11% pay for **ONLINE NEWS**

METHODOLOGY NOTE

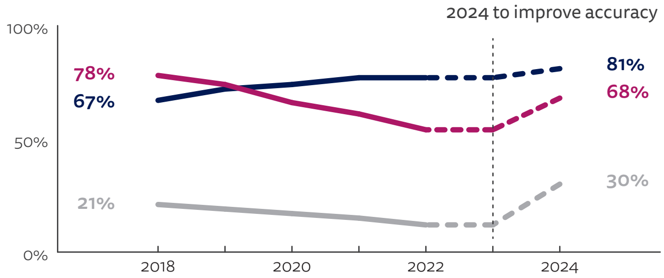
We introduced education quotas in 2023 to make data more representative of national populations. Part of the declines in reach in the source chart between 2022 and 2023 will be because there are more people with lower levels of education in our sample, who typically have lower interest in news.

SOURCES OF NEWS 2018–24



DEVICES FOR NEWS 2018–24

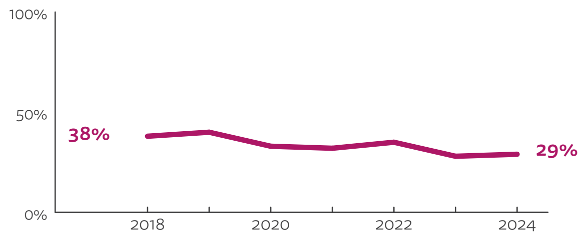
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in the news is down almost 10pp over the last seven years and remains one of the lowest in our survey. At the brand level, public broadcasters Bulgarian National Television and Bulgarian National Radio lead with 60% and 59%, respectively. They come under political pressure but follow legal requirements for fair treatment of all political parties.

OVERALL TRUST SCORE 2018–24



Proportion that trusts 'most news most of the time'

29% OVERALL TRUST
43/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
24 Chasa	47%	29%	24%
ABV News	41%	34%	25%
Bivol	41%	28%	31%
BTV News	53%	20%	26%
Bulgarian National Radio (BNR)	59%	23%	18%
Bulgarian National Television (BNT)	60%	20%	20%
Capital	47%	29%	24%
Darik	55%	27%	18%
Dir	41%	33%	26%
Dnevnik	43%	32%	24%
Euronews Bulgaria	51%	27%	21%
Nova TV News	58%	20%	22%
Novini	50%	29%	21%
Regional or local newspaper	42%	32%	26%
Trud	43%	29%	28%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 65.32	59/180

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

30% SHARE NEWS via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	56%	(-8)	71%
2	YouTube	32%	(+1)	61%
3	Viber	15%	(-6)	53%

Rank	Brand	For News		For All
4	Facebook Messenger	14%	(-4)	49%
5	TikTok	12%	(-)	29%
6	Instagram	11%	(-2)	30%

Population	4m
Internet penetration	93%

CROATIA

Croatia's small media market continues to be impacted by recent economic crises and the dominant role of big digital platforms. Offline use is dominated by two foreign-owned TV news channels (Nova and RTL) together with the public broadcaster (HRT). Long-term financial pressures have led to the closure of several local TV and radio stations, while consolidation in the local newspaper sector has highlighted concerns about increased political influence.

Overall advertising revenue grew by 5% in 2023 to reach €266m and finally return to 2% of the Croatian GDP (last seen in 2007). The greatest growth (10%) was in internet display, while the largest decline (7%) was in print. Television retains the lion's share of advertising revenue (47%), with internet display accounting for a quarter (25%).[46] In recent years publishers' share of online advertising revenues has been rising, by 10% in 2022.[47] Meanwhile, in spite of some growth, very few Croatians are prepared to pay directly for online news via subscription, membership, or one-off payment - just 9%, one of the lowest figures in our survey.

The major commercial TV companies have been foreign-owned for over two decades, with the United Group operating the cable news channel N1 and the top-ranked free-to-air station, Nova. Meanwhile Czech-based Central European Media Enterprises (CME) has owned the popular RTL TV since 2022. Austrian and German companies remain key players in the print market. The tabloid *24 sata*, owned by the Austria Styria group, is the best-selling newspaper and attracts large numbers of readers online, while the domestic-owned Hanza media is the market leader in print media overall.

Public broadcaster HRT relies on a compulsory licence fee of around €10.40 a month for the majority of its funding, with advertising accounting for just 7% of its income. But budgets are under pressure due to freezing of the licence fee since 2010, combined with recent rises in inflation. Press reports revealed recent plans by the HRT Director General, Robert Šveb, to cut costs and jobs to secure the company's future viability. While HRT claims it is editorially independent, as required by law, it is less trusted than the leading commercial operators, and many industry and academic experts highlight its continuing pro-government bias. In spite of this, HRT is in second place as an offline news source this year in terms of reach (after Nova TV with 49% reach), but it does much less well online, with just 17% of our survey respondents using it weekly.

The financial crunch prompted the closure of several popular local media which were respected for their investigative and critical reporting. These closures highlighted the dependence of local media on funding by local governments, and the possible influence that could give over their coverage.

Slovak media holding JOJ Media House sold its share in Novi list, the publisher of three local papers – *Novi list*, *Glas Istre*, and *Zadarski List* – to the locally owned Media Solutions, publisher of the local paper *Glas Slavonije*. JOJ cited high paper and energy costs as reasons for the sale and the subsequent planned consolidation. But the strong ties between the owners of Media Solutions and the ruling party, HDZ, led the Croatian Journalists Association to criticise this as an attempt to politically control the local press. This is particularly sensitive since 2024 is a super-election year in Croatia, with parliamentary elections held in April, EU elections in June, and presidential elections due in December.

Trust in institutions is traditionally low in Croatia and media are part of that trend. The coming election year is likely to see intensified attacks between political rivals, with the main actors continuing attempts to delegitimise their opponents with accusations of a lack of patriotism or of dishonesty.

State advertising was at the centre of a scandal in which a government minister was fired after his adviser was caught trying to arrange a kickback from a local TV station. This focused attention on the lack of transparency in government advertising and promotion on TV and radio. A report by GONG[48] found that over €7m was spent by government and state agencies between 2017 and 2021 on sponsorship or advertising in the media. The main media beneficiaries included two major TV stations – Nova TV and RTL TV – and the largest print companies Styria and Hanza media. Opposition parties and the Croatian Journalists Association called for the government and the media to provide the details of this spending, but to no avail.

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

[46] https://hura.hr/istrazivanja/medijska-potrosnja-u-hr/
[47] https://adex.hudi.hr
[48] https://gong.hr/2021/12/29/drzavno-oglasavanje-milijuni-iz-proracuna-i-drzavnih-tvrtki-slijevaju-se-u-birane-medije/

WEEKLY REACH OFFLINE AND ONLINE

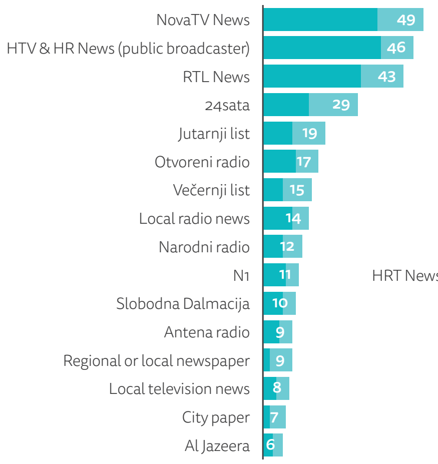
TOP BRANDS

% Weekly usage

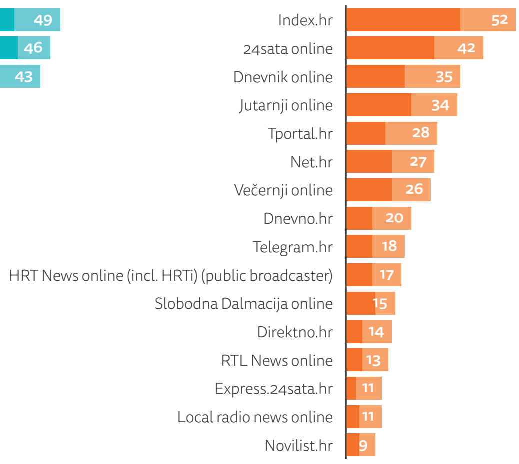
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

9% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



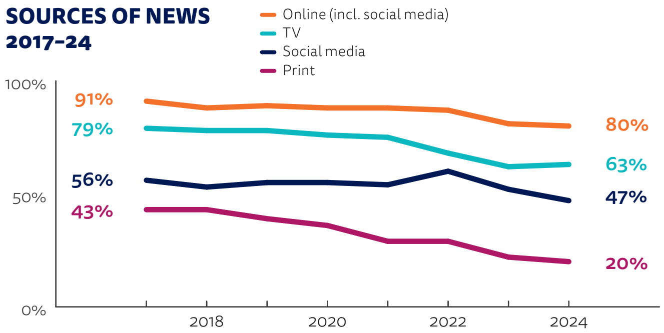
ONLINE



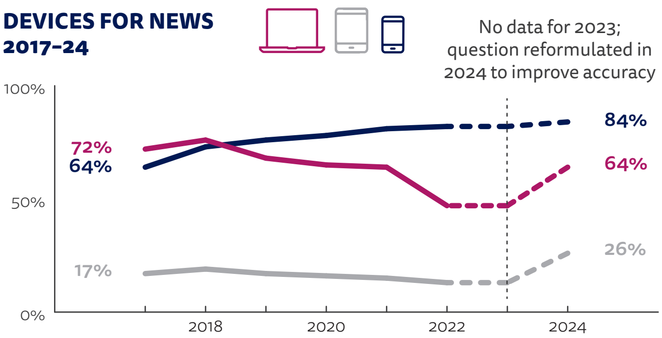
CHANGING MEDIA

TV remains an important source of news, well ahead of social media, while print's position today (20%) is less half of what is was eight years ago (43%).

SOURCES OF NEWS 2017–24



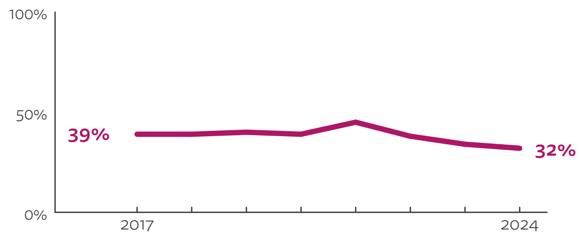
DEVICES FOR NEWS 2017–24



TRUST

Trust in news continues to decline, amidst a growing polarisation of society. It declined from a peak of 45% in 2021 (COVID-19 increase) to 32% this year. Despite this, some brands have increased trust in the last year, including news portal Telegram (+4pp) which is known for investigative critical journalism and has stepped up its efforts to recruit subscribers.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

32% OVERALL TRUST =35/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
24sata	46%	28%	26%
Dnevno.hr	43%	33%	24%
HTV News (public television)	52%	23%	26%
index.hr	46%	25%	29%
Jutarnji list	51%	27%	22%
N1	49%	31%	19%
Net.hr	42%	33%	24%
NovaTV	65%	22%	13%
Otvoreni radio	56%	30%	15%
Regional or local newspaper	50%	32%	18%
RTL News	61%	24%	15%
Slobodna Dalmacija	45%	34%	21%
Telegram	44%	31%	25%
Tportal.hr	45%	33%	22%
Večernji list	50%	27%	23%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 68.79	48/180

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

30% SHARE NEWS via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	49%	(-4)	67%
2	YouTube	24%	(-3)	61%
3	WhatsApp	18%	(-1)	59%
4	Instagram	14%	(-)	38%
5	Viber	11%	(-2)	43%
6	Facebook Messenger	8%	(-3)	36%

Population	10.7m
Internet penetration	87%

CZECH REPUBLIC

The Czech media had a turbulent year, characterised by legislative and ownership changes, but also by companies embracing digital innovations, including the use of AI in the newsrooms. The proposal to raise TV licence fees drew strong criticism from commercial media, while publishers have launched a joint campaign to defend their rights against digital platforms.

The media market continued to cope with a challenging financial situation in 2023, negatively impacted by economic recession (-0.4% GDP) and one of the highest inflation rates in the EU (+10.7%). These slowed the process of post-pandemic recovery in the sector and intensified competition for resources, including from digital advertising. Following the amendment to the Copyright Act, transposing the EU Directive on Copyright in the Digital Single Market, 17 leading media companies established the Czech Publishers' Licensing Association as the collective administrator of publishing rights, to strengthen their hand in negotiations with large tech platforms dominating the market – Google and Facebook in particular – about remuneration for the use of the publishers' content.[49]

The drying up of revenue streams has also opened a rift between commercial media and public service media (PSM), following the government's proposal to raise television and radio licence fees from 2025 (by €1 and 40 cents per month, respectively). Given that the fees have been static for the last 15 years in case of TV, and for 18 years for radio, their planned increase has been welcomed by supporters of Czech Television and Czech Radio as a long-overdue move to secure financial stability of both PSM organisations. However, in an unprecedented joint initiative, representatives of all the main commercial media have united against this plan, criticising the proposal to raise the fees without first (re)defining the mission and role of public service media in the digital age.[50]

While the future of the PSM funding was a highly contentious issue throughout 2023, the political independence of public service broadcasters has been reinforced. The amendments to the Act on Czech Television and the Act on Czech Radio, adopted in July 2023, have diversified the system of appointment (and dismissal) of the members of both PSM councils, by dividing these responsibilities, for the first time, between the Chamber of Deputies and the Senate. In addition, the Acts mean it is no longer possible to sack the entire council, but only individual members, and tighten the rules around nominations, which were often abused in the past for political motives. Even though the appointment process is ultimately still controlled by the Parliament, these changes have been broadly welcomed by media advocacy groups as positive steps, and an improvement compared to the previous system.

Another piece of legislation from 2023 brought about one of the biggest ownership changes on the Czech media market for years. Having closed a loophole that enabled beneficial owners to hide behind other legal entities, the amendment to the Act on Conflict of Interests has finally forced the ex-Prime Minister and leader of the political movement ANO2011, Andrej Babiš, to sell the media assets that have been 'parked' in his trust fund since 2017. His former media house, Mafra, and radio broadcaster Londa have been purchased by Kaprain Group, a Czech investment company owned by an entrepreneur Karel Pražák, thereby ending the decade during which one of the country's leading politicians (and a PM in 2017–21) controlled some of the most influential news media outlets, and a significant proportion of the media market.

There have been several other ownership changes, including the acquisition of Borgis, the publisher of the daily *Právo* and content supplier for Novinky.cz – one of the top news websites – by the largest Czech digital company Seznam. The country's oldest political weekly *Respekt* split from the media house Economia and started operating under a newly established independent publisher Respekt Media, co-owned by the journalists and a consortium of Czech and Slovak investors.

In 2023 there was further expansion of the use of AI in the Czech media, both for content production and moderation. In June, Expres FM (owned by Seznam) became the first commercial radio station to introduce a regular AI programme host; since then, several other AI-generated presenters have been added, mainly to read regional news. In January 2024, regional TV Brno 1 announced plans to use AI avatars as on-screen news anchors. Several media companies, including Seznam, Economia, Prima, or Refresher, started utilising AI for content moderation on discussion forums and social media sites, including the detection and filtering out of disinformation.[51]

Václav Štětka
Loughborough University, UK

[49] https://www.ctk.eu/news/?id=3762
[50] https://english.rozanek.cz/czech-industry-groups-halt-public-television-law/
[51] https://www.mediaguru.cz/clanky/2023/07/startup-proti-dezinformacim-elv-ai-vstupuje-na-cesky-trh/

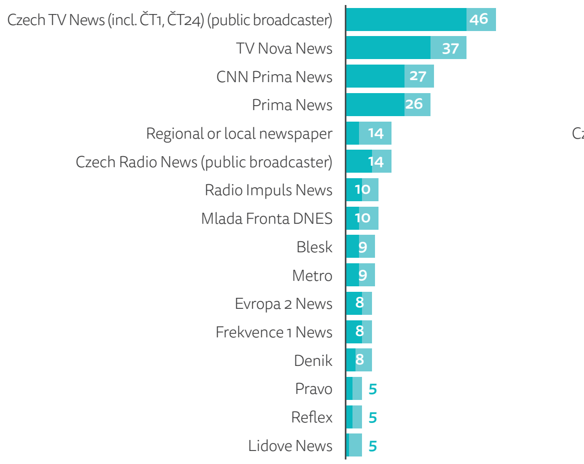
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

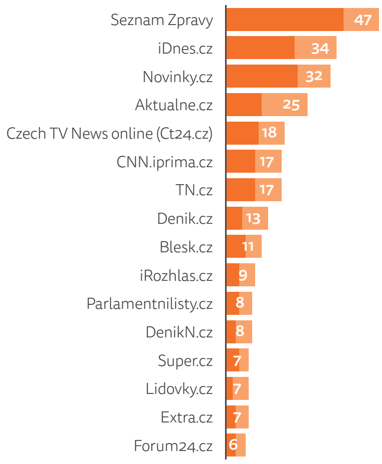
Weekly use TV, radio & print
More than 3 days per week TV, radio & print
Weekly use online brands
More than 3 days per week online brands

13% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



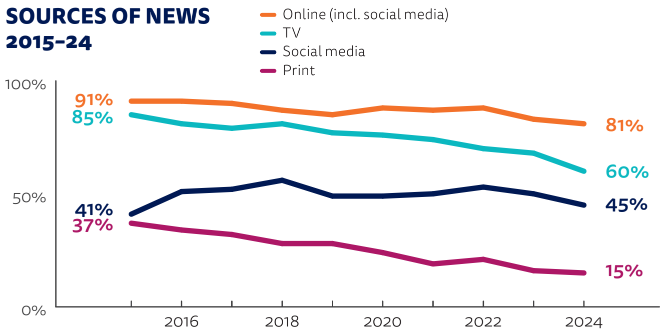
ONLINE



CHANGING MEDIA

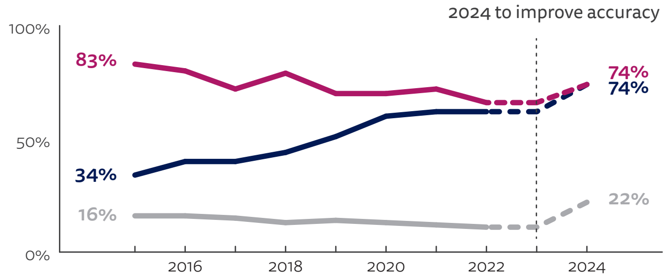
Since 2015, the proportion using TV and print as news sources has declined by 25% and 22%, respectively. Online and social media have also dropped significantly since 2022.

SOURCES OF NEWS 2015–24



DEVICES FOR NEWS 2015–24 *

No data for 2023; question reformulated in 2024 to improve accuracy

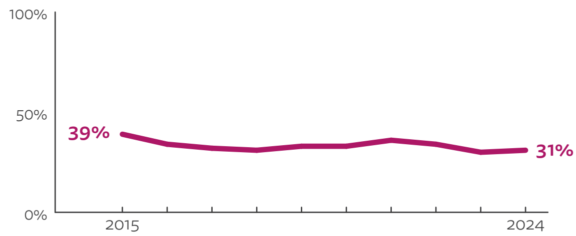


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Overall trust in news media has remained low, reflecting the country's troublesome economic situation and polarised political climate. Trust in individual news brands has increased this year, in some cases significantly (by 4–5pp). The public service media (Czech Television and Czech Radio) continue to hold their status as amongst the most trusted news brands of those polled.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

31%
OVERALL TRUST
=38/47 markets

	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 80.14	17/180

RSF REPORTERS WITHOUT BORDERS

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Aktualne.cz	54%	29%	18%
Blesk	18%	22%	60%
CNN Prima News	56%	22%	21%
Czech Radio News (public broadcaster)	62%	22%	17%
Czech TV News (public broadcaster)	59%	17%	24%
Deník	49%	33%	18%
Frekvence 1	50%	32%	18%
Hospodářské noviny	58%	27%	15%
iDnes.cz	53%	27%	20%
Lidové noviny	49%	31%	21%
Mlada Fronta DNES	47%	30%	23%
Novinky.cz	51%	28%	21%
Radio Impuls	48%	33%	19%
Seznam Zpravy	57%	23%	21%
TV Nova	43%	25%	32%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

28%
SHARE NEWS
via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	36%	(-9)	67%
2	YouTube	21%	(-3)	59%
3	WhatsApp	17%	(+2)	57%
4	Instagram	12%	(-)	35%
5	Facebook Messenger	10%	(-3)	43%
6	X (formerly Twitter)	6%	(-1)	11%

Population	5.8m
Internet penetration	98%

DENMARK

The Danish media market has two strong public broadcasters (DR and TV2) and several successful commercial brands, which receive an annual public subsidy. Commercial news organisations are facing increased newsprint costs, declines in print subscribers and advertising revenue, growing inflation, and increased wages after a March 2024 deal with unions. Company responses involve cost-cutting and redundancies.

The growing financial pressures on commercial media have led to a 'cascade of cutbacks' (*Mediawatch*) in the past year,[52] often accompanied by industrial action from journalists. TV and print advertising revenues dropped 16% in 2023 and small increases in advertising on media companies' digital services did not make up for this decline. Decreasing traffic from social media is being met with plans for differentiated pay models, including those involving bundling different services. In the TV market, TV2 faced 65 layoffs. After going online-only in 2023, the tabloid BT is losing revenue and users.

In the newspaper market, regional and local media in particular suffered considerable losses in 2023. One regional news organisation will phase out print newspapers by 2027, while others are considering less-than-daily editions and increased subscription prices. Some regional/local conglomerates have merged local free weekly titles, and stopped home delivery, relying solely on distribution at shopping centres and transport hubs. Weekly magazine publishers will be closing some print titles in 2024.

Most commercial news websites – except the tabloid BT which relies solely on advertising – have paywalls with only limited content freely available, and our 2024 survey reports a relatively high rate of paying for news online (17%). Digital subscription prices in Denmark are quite high but many people don't pay the full price. Public and commercial media are intensifying efforts to get users to log in and provide first-party data. Those reliant on commercial revenues hope this will improve cross-pollination between free and paid content and attract increased advertising revenues.

All Danish news organisations are investing heavily in generative AI tools and are gradually implementing them in daily news operations. In early 2024, JP/Politiken launched an in-house repository of trusted content from its three titles that can be used to drive AI experimentation, including assisting journalists with interview transcription, news text and headline generation, and in time voice clone and photo generation functions. All news organisations are experimenting with recommendation algorithms that also recognise the democratic functions of news. In February 2024, *Jyllands-Posten* launched a new personalising frontpage algorithm, that tries to combine user preferences with an additional journalistic weighting score designed to avoid echo-chamber type effects. In late 2023 an updated version of the Danish rules on press ethics was produced which now specifically covers material that has been partly or wholly created using AI.[53]

Publishers are continuing their efforts to combat big tech's exploitation of news organisations' copyrighted content and data archives for AI-model training purposes. After collective negotiations with tech giants, an agreement was landed with Microsoft and Google. But Meta, Apple, and TikTok have declined participation in state-mandated conciliation talks.

An overhaul of the system of state subsidies, which sought to increase platform neutrality between print and online news media, achieved political consensus. These subsidies, totalling around €55m, are awarded to 'publicistic media', i.e., commercial companies meeting a 50% threshold of news covering politics, society, and culture. National news organisations were concerned because the deal redirects subsidies from national to local and regional news organisations and reduces subsidies to companies owning several titles. But the intention behind these changes is to reverse the trend towards increasing numbers of local news deserts.

The streaming market is heavily dominated by evenly balanced competitors TV2 Play, Netflix, and DR-TV. Recent research from DR shows that in the general TV market, live viewing continues to decline slowly, with streaming growing steadily.

Although declining, Facebook is still the leading form of social media for news in Denmark (32%), even among the young 18–24 (34%), with Instagram (19%) and TikTok (15%) following. With TikTok, news organisations are divided about how to balance reaching the young against risks of Chinese data leaks/ surveillance, with *Ekstra Bladet* and *Zetland* continuing use of the platform.

Although consumption levels plateaued in 2023, podcasting is continuing its march towards mass media status as new providers mushroomed among established news media and startups. Market leader DR started removing its podcasts from commercial third-party platforms in order to focus listening through its own audio platform but suffered some (forecast to be temporary) losses in podcast reach. Traditional radio listening dropped by 9% in 2023.

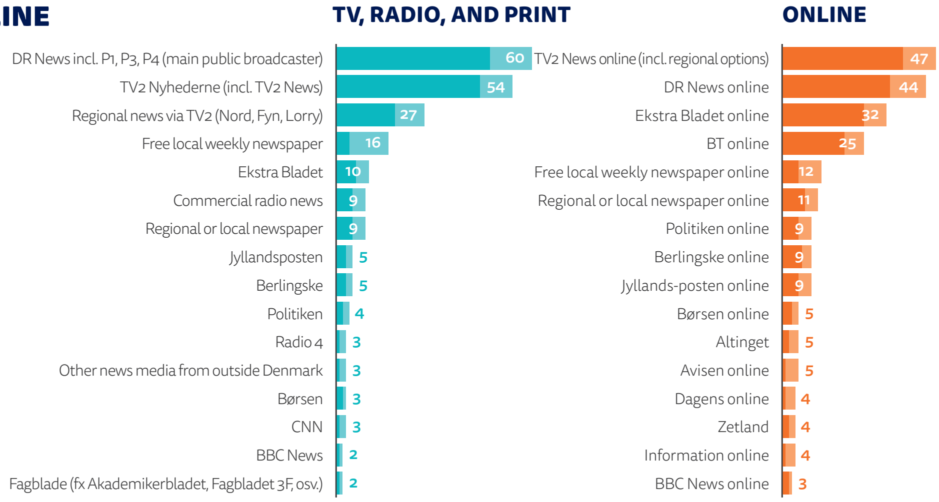
Kim Christian Schrøder, **Mark Blach-Ørsten**, and **Mads Kæmsgaard Eberholst**
Roskilde University, Denmark

[52] This and other insights about the Danish media landscape are based on the trade journal *Mediawatch*.
[53] https://www.pressenaevnet.dk/retningslinjer-for-god-presseskik/

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

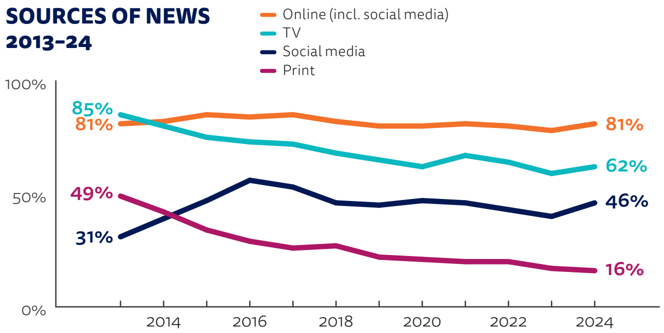


17% pay for **ONLINE NEWS**

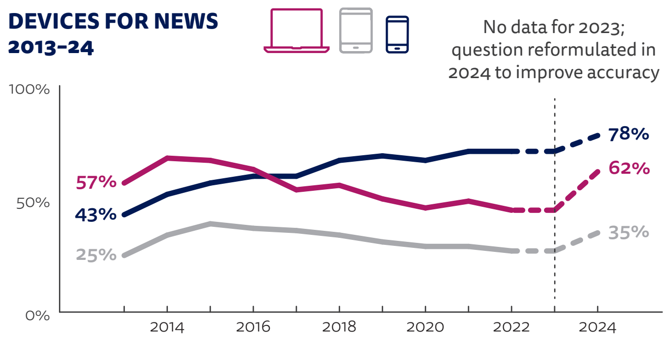
CHANGING MEDIA

In 2024 news from social media has increased by 6 percentage points (pp). Online and TV news use has grown by 3–4pp, led by national and regional public service news providers.

SOURCES OF NEWS 2013–24



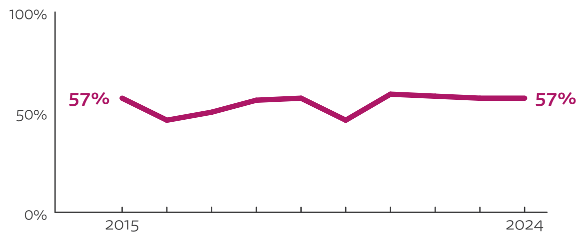
DEVICES FOR NEWS 2013–24



TRUST

General trust in news media has remained pretty stable over the last decade. In 2023 there were several public debates with criticism of news media, over alleged pro-Israel coverage of the Israel/Palestine conflict, and a plagiarism case at a national newspaper. Neither seems to have affected general trust or trust in the largest and most trusted brands, DR and TV2.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

57% OVERALL TRUST =4/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Altinget.dk	55%	32%	12%
Avisen	42%	39%	19%
Berlingske	68%	23%	8%
Børsen	71%	21%	7%
BT	41%	25%	34%
Dagens.dk	35%	37%	28%
DR News (main public broadcaster)	84%	10%	7%
Ekstra Bladet	35%	21%	44%
Information	65%	26%	9%
Jyllands Posten	68%	22%	10%
Kristeligt Dagblad	57%	30%	14%
Politiken	70%	21%	9%
Regional or local newspaper	69%	24%	7%
TV2 Nyhederne (incl. TV2 News)	81%	12%	7%
Zetland	53%	33%	14%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 89.6	2/180

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

35% listened to **PODCASTS** in the last month

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	32%	(+1)	70%
2	YouTube	10%	(+3)	48%
3	Instagram	9%	(+2)	42%
4	Facebook Messenger	8%	(-)	56%
5	X (formerly Twitter)	6%	(+1)	11%
6	LinkedIn	5%	(-)	20%

Population	5.6m
Internet penetration	94%

FINLAND

Finland's news media environment features a strong regional press, a strong public service broadcaster (Yle), one widely read national upmarket daily (*Helsingin Sanomat*), and two popular evening tabloids, both reaching over half of the adult population. The digital transition continues with several regional newspapers moving away from daily print publication.

Declining print revenues and increasing delivery costs have hit newspapers hard in sparsely populated Finland. Newspaper companies tried to reduce costs through acquisitions and by reducing the number of weekdays when readers receive their paper in print. In the first half of 2023, five regional newspapers announced plans to do this. For example, *Kaleva* in the Oulu region now only appears in print from Monday to Saturday.

While revenues from print continue to decline, digital earnings are not growing much either. Newspaper online advertising (free city papers included) decreased 1.4% from 2022 to 2023,[54] and according to our survey, the share of payers for online news has stayed flat since 2020 and is now 20%. Subscriptions are heavily concentrated, with 51% of Finnish respondents with a current digital subscription saying it is to *Helsingin Sanomat*. Strikingly too, 38% say that they are paying for regional or local news online. Both are high figures internationally.

In March 2021, one of the two Finnish evening tabloids, *Iltalehti*, introduced a paid 'Plus' section, while most of the site can still be read for free. This has proved a successful move because 18% of the subscribers in our survey now say they have subscribed to *Iltalehti* Plus. In February 2024, the other Finnish evening tabloid, *Ilta-Sanomat*, followed *Iltalehti*'s example and introduced its own paid 'Extra' section. Both tabloids now publish a few paid stories per day and price their subscription at €6.99 per month.

There are also efforts for curating news from different outlets in a single user-friendly service. A Finnish startup, Briif, selects newspaper and magazine stories that it considers interesting for its target group and delivers them in audio for €11.99 per month or €99.99 per year.[55] Briif focuses particularly on young women, and has a contract with several media houses, including Otava, Sanoma, and the *Financial Times*. The idea is that the media houses are paid in proportion to the content that is listened to. Briif aims to expand into other European markets, with articles in the local language.

The concentration of Finnish regional media into the hands of two main players, Sanoma and Keskisuomalainen, continued, with Sanoma buying *Länsi-Suomi* and merging it with *Satakunnan Kansa*, another regional paper appearing in Western Finland. Keskisuomalainen, for its part, acquired PunaMusta's media businesses including *Karjalainen*, a regional paper in Eastern Finland.

In 2023 there was a major deal within Finland's Swedish-language news media. Sweden's Bonnier became a majority owner of *Hufvudstadsbladet* and two local newspapers, *Västra Nyland* and *Östra Nyland*. These papers were previously wholly owned by Konstsamfundet, a wealthy association promoting art and culture for Swedish-speaking Finns and paying its newspapers' losses. It has promised to continue its support to some extent, even though the aim is for profitability.

Finnish major news companies are actively adopting artificial intelligence tools into their operations and have set up special teams for that. In some newsrooms, generative AI already helps in composing news headlines, shortening stories to the desired length, or writing summaries of larger articles or themes.

The position of Finnish public service media Yle has long been a contentious issue in Finnish media policy. Private media companies have blamed the PSB for unfair competition in the digital world while the population largely see Yle as trustworthy and important. The main parties (National Coalition Party and Finns Party) in the current right-wing government previously proposed cutting Yle's funding, and a parliamentary working group is reviewing Yle's public service remit, funding, and its relationship with commercial media. The report is expected in May or June 2024. Yle's half-billion-euro budget is funded mainly by the annual Yle-tax of a maximum of €163 collected from Finnish taxpayers.

The changing media environment and new business models have also created pressures to update the Journalistic Guidelines, the major self-regulatory ethical guidebook for Finnish journalists, with updated guidelines accepted in April 2024. One addition in the new version is a statement that sponsored articles are allowed, but that the funder must be clearly stated if they affect the choice of subject area of the sponsored contents. All other decisions about journalistic content must be made independently of the funder, it says. The new guidelines come into effect in October.

Esa Reunanen
Tampere University, Finland

[54] https://www.kantar.com/fi/inspiraatioksi/mediamainonnan-maara/vuosi-2023
[55] https://briif.io/

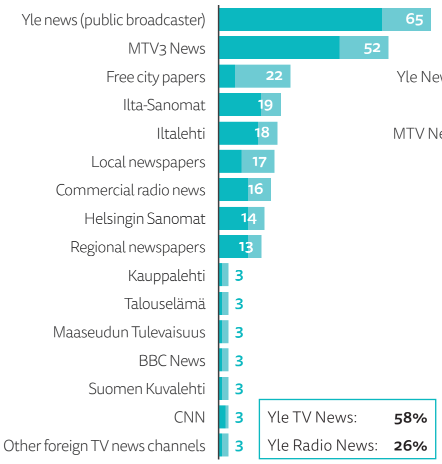
WEEKLY REACH OFFLINE AND ONLINE

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

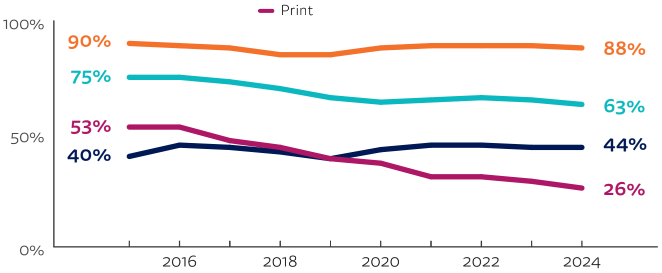
20% pay for **ONLINE NEWS**

CHANGING MEDIA

The use of online news sources is unchanged, with almost 90% weekly reach, while television news and the printed press continue their slow decline.

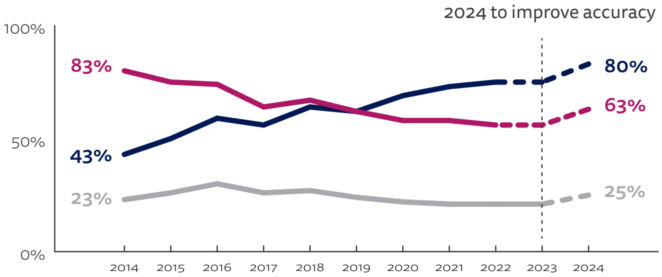
SOURCES OF NEWS 2015–24

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



DEVICES FOR NEWS 2014–24

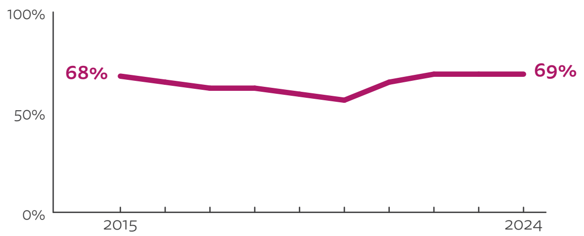
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Finnish news remains the most highly trusted among the countries surveyed, with no major changes from 2022. The news media in Finland are not politically polarised, so politically based scepticism felt by a minority towards the news media targets all the major news brands. For some others, scepticism seems to be linked to an outlet's tabloid image.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

69% OVERALL TRUST 1/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 86.55	5/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Commercial radio news	68%	19%	13%
Free city papers	58%	24%	18%
Helsingin Sanomat	80%	10%	11%
Hufvudstadsbladet	68%	22%	10%
Iltalehti	62%	15%	22%
Ilta-Sanomat	64%	15%	21%
Kauppalehti	79%	15%	7%
Local newspaper	80%	14%	6%
Maaseudun Tulevaisuus	72%	18%	10%
MTV News	80%	11%	9%
Regional newspaper	78%	15%	7%
Suomen Kuvalehti	75%	17%	8%
Talouselämä	80%	14%	6%
Uusi Suomi	64%	24%	13%
Yle News (public broadcaster)	85%	6%	9%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	28%	(-4)	65%
2	YouTube	15%	(-)	63%
3	WhatsApp	14%	(-1)	72%
4	Instagram	10%	(-)	46%
5	X (formerly Twitter)	7%	(-1)	15%
6	TikTok	6%	(+1)	21%

Population	66m
Internet penetration	92%

FRANCE

In France, it has been a year of billionaires buying media assets. Amidst increased concerns about media independence, debates about how regulation can support media pluralism and how journalists can approve appointment of leading editors are echoing through the work of the Estates General of News created by President Macron.

In spring 2024 it was announced that leading 24-hour TV channel BFMTV, previously owned by the billionaire Patrick Drahi, is to be sold. The purchaser is the billionaire shipping magnate Rodophe Saadé, whose group has bought the Marseille-based newspaper *La Provence* and the former business paper, *La Tribune*, now reborn as a Sunday newspaper *La Tribune Dimanche*, and a 10% share in the TV station M6.

During the summer of 2023, journalists at the famous Sunday newspaper *Le Journal du Dimanche* (*JDD*), recently acquired by billionaire Vincent Bolloré, held a 40-day strike against the appointment of a new right-wing editor-in-chief. Fearing that the new leadership might convert the paper into a tool for the far right, many politicians and personalities supported the movement. Almost 90% of the journalists resigned and it led to a major debate in France about the role of journalists in approving the editor-in-chief. Some presume Bolloré will adopt the strategy with the *JDD* that he did with CNews, which became the closest thing in France to a Fox News-type channel in the years after he bought it. However, a dramatic decision by the French highest administrative court may change this, by calling on Arcom, the media regulator, to better enforce its political plurality requirements over CNews.

Les Echos, a daily business newspaper, has had a year without an editor after the journalists and owner (LVMH) failed to agree on the appointment. In September 2023, the journalists voted against the owner's proposed candidate, the current deputy editor. LVMH's next candidate, Christophe Jakubyszyn, a famous economic journalist from BFM Business, was submitted to another vote by the newsroom in April 2024 and approved, by 213 for and 20 against.

Les Echos, *Le Monde*, and some other newspapers have this 'right of agreement'. The question of how it could be extended to any newsroom in France, where commercial media support 70% of the cost of news[56] in France compared to 30% by public TV and radio, together with how regulation should protect media independence, is part of the agenda of the Estates General of News launched by President Macron in October 2023. Proposals are expected in June 2024.

Relations with platform companies will no doubt feature in those recommendations. So far relations between French publishers and platforms have ebbed and flowed, with a mixture of fines and deals. In March 2024 the competition authority fined Google €250m on the grounds of not respecting some of its commitments to publishers on remuneration for content shown online, as well as how information was shared with them.

Le Monde is the first French newspaper to sign a lucrative deal with Open AI: it allows ChatGPT users to access content from *Le Monde*. *Le Monde English*, which was launched in 2022, also uses AI technologies to translate the first draft of each article, which humans then revise.

There's been no increase in the low level (11%) of our survey respondents paying for news online, but France is unusual in that our respondents who pay said they had an average of two subscriptions – which is only the case in a few of the other countries in the survey, such as the United States. *Le Monde*, *Le Figaro*, and Le Mediapart are the top three outlets that people have subscribed to online and they are all seeing increases. *Le Monde*'s digital numbers hit 527,000, *Le Figaro* 227,000, and digital-born Mediapart 220,000 subscribers. The last of Mediapart's co-founders handed over to a new female CEO/Editor-in-Chief, Carine Fouteau.

Among the successful latest disruptors are alternative voices such as Hugo Travers, known as Hugo Decrypte,[57] whose company now employs 25 people and has just launched a new product named Elan targeted at the young as they look to enter working life. Decrypte's YouTube explainers for younger audiences are very popular, so popular in fact that President Macron chose to be interviewed by him. Last year, Hugo Travers and his team were refused a French press card, because the authorising committee argued that there is a difference between being a journalist and a content creator. After some negotiations they now have a press card, on the grounds of having more written pieces published online rather than just videos.

Alice Antheaume
Executive Dean, Sciences Po Journalism School

[56] A figure largely based on the cost of employing staff and freelance journalists and associated journalism-related costs.
[57] See Chapter 2.5: *What do we Know about the Rise of Alternative Voices and News Influencers in Social and Video Networks?*, p. 53.

WEEKLY REACH OFFLINE AND ONLINE

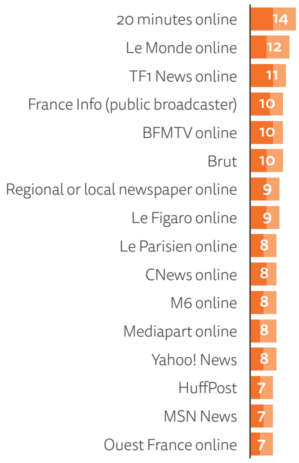
TOP BRANDS
% Weekly usage

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

11% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT

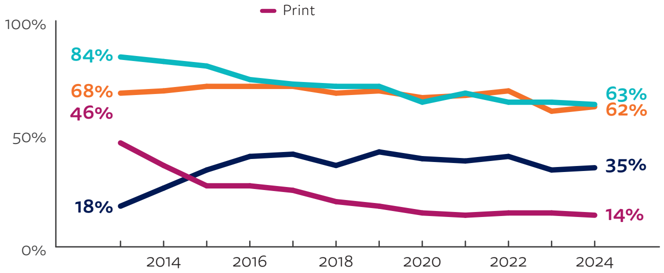
ONLINE



CHANGING MEDIA

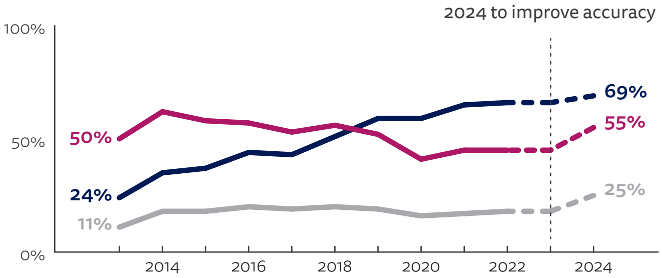
TV remains the most accessed news source in France, along with online media. Printed newspapers remain in long-term decline, requiring legacy media companies to find new digital revenue streams.

SOURCES OF NEWS 2013–24



DEVICES FOR NEWS 2013–24

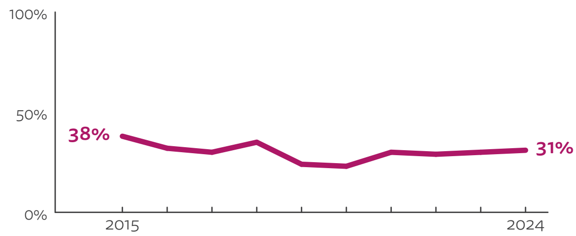
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

France still ranks low for overall news trust (31%) by international standards. Most brands, however, have increased their trust levels slightly this year, with regional or local papers being most trusted of those we survey, followed by public service brands and *Le Monde*, the leading quality newspaper brand. Among those included in our survey, BFMTV is the brand with lowest trust (38%), along with 40% who distrust it.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

31% **OVERALL TRUST =38/47 markets**

RSF REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 78.65	21/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
20 Minutes	44%	38%	18%
BFMTV	38%	21%	40%
CNews	42%	26%	32%
France Bleu	49%	37%	14%
France Info	57%	28%	14%
France Inter	53%	30%	17%
France Télévisions News	60%	24%	16%
Le Figaro	44%	37%	19%
Le HuffPost	38%	41%	21%
Le Monde	53%	30%	16%
Le Parisien/Aujourd'hui en France	44%	37%	19%
M6 News	47%	35%	18%
Mediapart	46%	30%	24%
Regional or local newspaper	63%	27%	10%
TF1 News	49%	18%	23%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

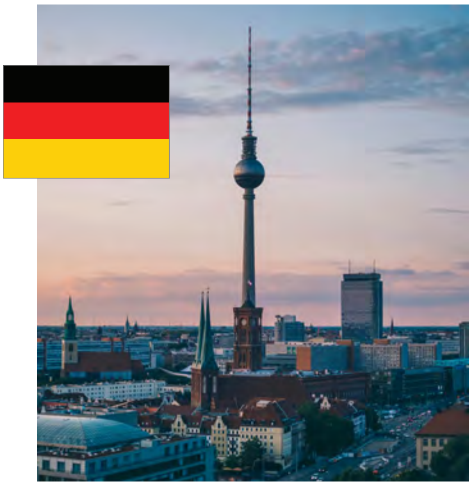
28% listened to **PODCASTS** in the last month

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	32% (-4)	55%
2	YouTube	21% (-2)	47%
3	Instagram	16% (-)	36%
4	WhatsApp	16% (+1)	44%
5	Facebook Messenger	10% (-4)	31%
6	X (formerly Twitter)	9% (+1)	13%

Population	84m
Internet penetration	94%

GERMANY



The German market has a number of national and regional public broadcasters that compete for audiences with powerful commercial operators (including Axel Springer and Bertelsmann). Much of the press still operates from a regional or local standpoint and has struggled to adapt its business models to digital. Now the next wave of disruption is hitting newsrooms with a focus on artificial intelligence (AI).

Public awareness of artificial intelligence remains somewhat limited, but already the majority of Germans are sceptical about its use in the newsroom. Only 14% of those surveyed are comfortable with using news mainly produced by AI. However, when news is mainly produced by journalists with assistance from AI, the proportion increases to one in three (36%). Meanwhile, German newsrooms are witnessing an increased utilisation of AI primarily to assist news production, potentially freeing up resources for in-depth investigations and enhancing reader engagement. For instance, the public broadcaster ZDF uses AI for live television broadcast captioning. The national weekly newspaper *Die ZEIT* is experimenting with an AI-based application to answer reader questions on current events from its archives. For digital subscribers with little time, the national daily newspaper *Frankfurter Allgemeine Zeitung* (*FAZ*) offers an AI-generated summary of selected news articles within its news app.

The deal between the Axel Springer media company, owner of Germany's most popular tabloid newspaper *Bild*, and OpenAI has also caused quite a stir. Axel Springer has agreed to supply ChatGPT with selected content from its news brands, including *Bild*, *Die Welt*, *Politico*, and *Business Insider*, to train ChatGPT to provide information on current events. For Axel Springer the incentive is that the ChatGPT responses will link to the full Springer articles, the company will reportedly receive very significant funding for use of their content, and OpenAI will support Springer in its own AI-driven projects. In light of Springer's digital-only strategy, the increasing use of AI is also seen as a way to save costs, i.e, through significant job cuts.

Following a slight increase in revenues in 2023, the overall advertising market saw a marked rise in January and February 2024 (+11% compared to the previous year). However, the proportion of our survey respondents who say that they are paying for online news remains low at 13%. Among the titles mentioned most frequently in this context were regional or local daily newspapers, *Bild*, and *Die Welt*. The paywalled site *Bildplus* now has over 700,000 subscribers, the biggest subscriber base in the German-speaking world. So while *Bild's* circulation fell below the 1 million mark by the end of 2023, falling print revenues are finally being compensated by growth in digital.[58]

The digital transformation of the newspaper industry is accelerating due to significantly increased costs of print production and delivery. Following *Bild* and *Die Welt's* mid-2023 announcement that they were ending home delivery of their Sunday editions, other brands, such as *Tagesspiegel*, *Berliner Morgenpost*, or *Hamburger Morgenpost* replaced some of their printed editions. In rural areas, some print editions have either stopped or are no longer being delivered, but getting people to switch to digital papers can be difficult. For example, in May 2023 the *Ostthüringer Zeitung* discontinued its print edition in rural parts of its circulation area in Thuringia. Within a year, 45% of subscriptions were cancelled.

The downward trend in news trust in Germany stabilised this year. However, there is an increase in attacks and hostility towards journalists, often linked to investigations into right-wing extremism. Furthermore, during some of the so-called farmer protests, which are primarily directed against the Green government party, Bündnis 90/Die Grünen entire media houses were blocked by protesters, e.g. preventing newspaper delivery trucks leaving the buildings.

In March 2023 the Broadcasting Commission of the federal states established a so-called Future Council to develop a long-term perspective for German PSB.[59] The committee has eight experts from the fields of science, media law, and journalism and in January 2024 published its first recommendations. It suggested that German PSBs should become more digital and efficient, while better fulfilling its public service mandate. Among other things, the experts called for structural reforms, a shared digital platform for ARD, ZDF, and Deutschlandradio, as well as a new (ex-post) funding procedure based on whether the institutions have fulfilled their public service mandate, i.e. in terms of reaching all parts of society and aspects of their content being sufficiently distinctive. While the recommendations are only advisory, they certainly increase the pressure for far-reaching reforms within the German PSB.

Julia Behre, **Judith Möller**, and **Sascha Hölig**
Leibniz Institute for Media Research, Hans Bredow Institute, Hamburg

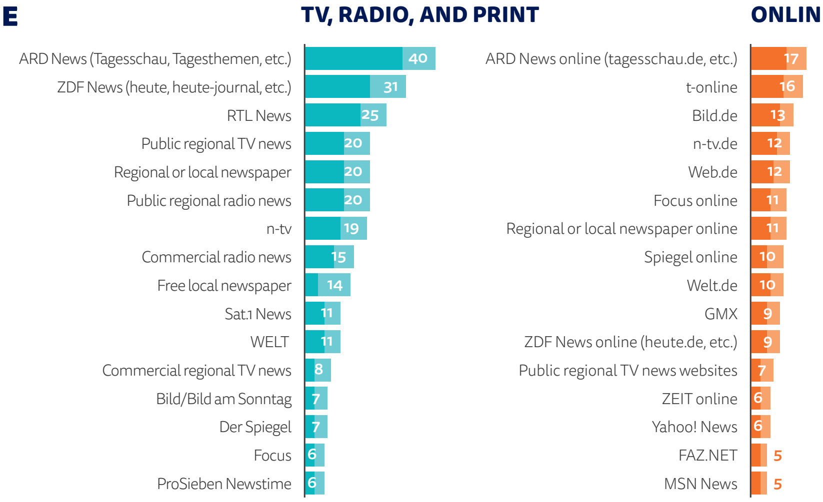
[58] https://www.dwdl.de/zahlenzentrale/96488/ivwauflage_bild_faellt_erstmals_unter_die_millionenmarke/
[59] https://rundfunkkommission.rlp.de/fileadmin/rundfunkkommission/Dokumente/Zukunftsrat/ZukunftsratPressemitteilung_.pdf

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

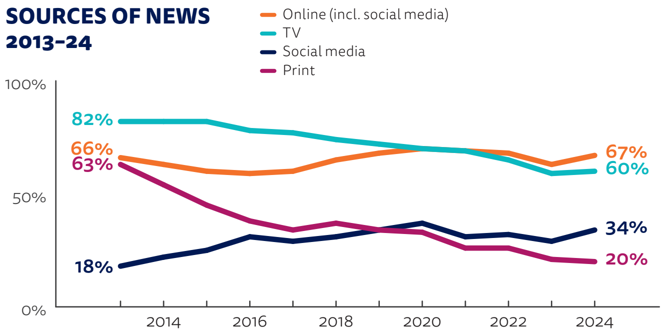
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

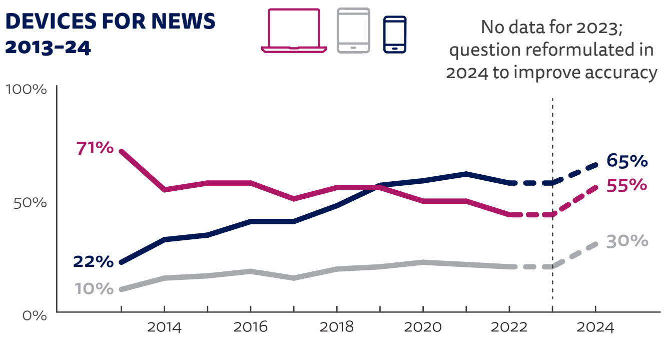
13% pay for **ONLINE NEWS**



CHANGING MEDIA

Weekly reach for both TV news and print is near all-time lows, with online and social media not making up the gap.

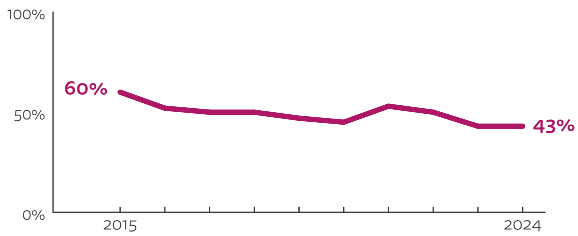




TRUST

Trust in news has stabilised after a 7 percentage point drop from last year, but remains at a lower level than before the COVID bump, with regional or local newspapers and PSB news being the most trusted brands in the list surveyed. Despite its wide reach, the national tabloid *Bild* still has the lowest ratings.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

43%
OVERALL TRUST =15/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
ARD Tagesschau	64%	16%	20%
Bild	22%	21%	57%
Der Spiegel	54%	23%	22%
Die ZEIT	55%	26%	19%
FAZ	54%	28%	18%
Focus	52%	27%	21%
n-tv	59%	23%	18%
Regional or local newspaper	63%	22%	15%
RTL aktuell	45%	26%	30%
Stern	49%	28%	23%
Süddeutsche Zeitung	56%	26%	19%
t-online	44%	32%	24%
web.de	35%	35%	29%
WELT	54%	25%	21%
ZDF heute	62%	18%	20%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 83.84	10/180

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

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	YouTube	21%	(-5)	51%
2	Facebook	16%	(+2)	37%
3	WhatsApp	15%	(+1)	65%
4	Instagram	11%	(+3)	31%
5	TikTok	5%	(+2)	14%
6	X (formerly Twitter)	5%	(-)	9%

Population	10m
Internet penetration	79%

GREECE

The Greek media market is characterised by a high degree of media concentration, digital brand fragmentation, high use of social media for news, and the lowest trust in news amongst our 47 markets, due to political polarisation and concerns about undue influence from politicians and powerful businessmen.

The past year was characterised once again by polarising debates about the relationship between politics and media. This was intensified due to a prolonged electoral period lasting from March until October and including four elections held at the parliamentary as well as the regional/local level. During the past year, the government and the main opposition parties again offered two radically opposing narratives about press freedom and, more broadly, the state of democracy and rule of law in Greece. The government cites the Economist Intelligence Unit's Democracy Index which upgraded Greece from 'flawed' to 'full' democracy for their first time since 2008. The opposition cites the damning Press Freedom Index ratings from Reporters without Borders (RSF) and a recent resolution adopted by the European Parliament citing concerns about the rule of law and media freedom in Greece.

The board of the independent broadcasting regulator in Greece, the National Council for Radio and Television, was replaced in September 2023. The appointment of the new board was not a result of customary consultation and compromise between political parties. Just three weeks before the vote, the president of the Greek Parliament enlarged the membership of the Parliament's governing group that decides who is appointed to independent authorities. Despite this manoeuvre the new board only just achieved support from the required majority in a controversial manner, and its appointment was met with strong opposition from other parties.[60] The only party that voted for the new board of the regulator, other than the governing New Democracy, was the far-right party Elliniki Lysi. The party has been vocal in opposing independent authorities and its leader previously faced large fines from the broadcasting regulator for hate speech and misleading commercial advertisements.

Media companies in Greece have been slow to introduce online subscription models compared to elsewhere in Europe, in part because of their fear of losing audiences and influence, as well as the long-lasting economic crisis. But the past year saw some moves towards digital pay models, prompted in part by falling referrals from social networks. *Kathimerini*, a leading legacy newspaper, recently introduced a soft paywall, being one of the very few Greek newspapers to have done so. Their freemium offer gives unrestricted access to all its pages as well as exclusive access for subscribers to newsletters, op-eds, audio articles, and games.

In 2022, the public service broadcaster, ERT, launched a 24-hour news channel ERTNEWS to strengthen its news offering, which now has 19% weekly use amongst our respondents. Their successful web streaming platform Ertflix, which includes news but it is primarily used for entertainment programmes, has been at the forefront of controversy by commercial broadcasters who are struggling to build subscribers to their paid platforms. Some commercial broadcasters have argued that Ertflix represents unfair competition and asked the government to force ERT to charge for the service.

There have been changes in the state subsidies granted to broadcasters. Until recently broadcasters were getting hefty state subsidies for producing TV series. The funding also helped them strengthen current affairs programming. However, the subsidies have now been cut dramatically, creating problems for some, but potentially leaving more space for (cheaper) current affairs programming on commercial TV.

In a further expansion of his media empire, Evangelos Marinakis, a shipping magnate who already owns a number of major outlets in Greece (*To Vima*, *Ta Nea*, in.gr, Mega TV broadcaster, and One TV broadcaster), bought the rights to use the domain of the historic left-wing newspaper *Eleftherotypia* and its Sunday edition *Kyriakatiki Eleftherotypia* for €8.1m. The newspaper closed in 2014 after going bankrupt. In addition, 2022 pod.gr, a successful website for podcast production, was bought by the media group belonging to the Vardinogiannis family.

Social media continue to be used by most Greeks online to get news (61%), however the platforms they use are changing. Facebook is now only used for news by 44% of Greeks who are online, down from 68% in 2016. Meanwhile Instagram and TikTok are now increasingly used for news, 20% and 14% respectively, particularly among younger audiences. However, Greek publishers are still struggling to attract large audiences on these platforms which are dominated by social media personalities or smaller digital-born brands.

Antonis Kalogeropoulos
Free University Brussels (VUB)

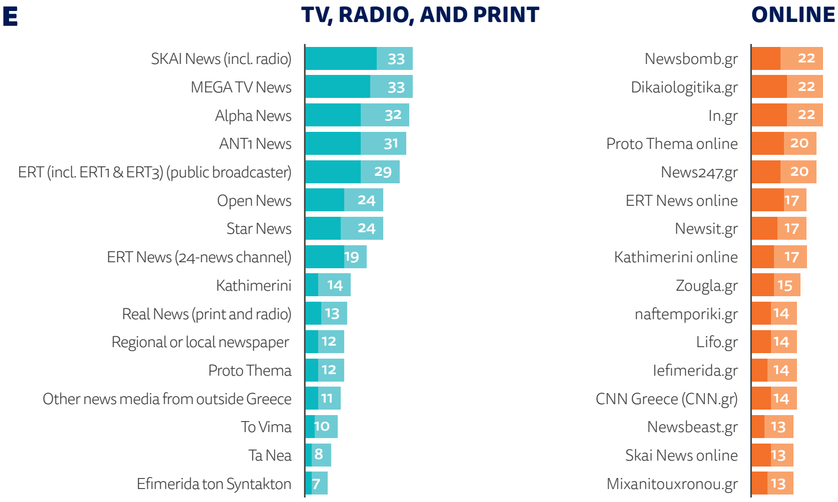
[60] https://vouliwatch.gr/resources/file/2023/11/7/5f34e7a5-6701-44a9-b201-c33ef392ad54.pdf

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

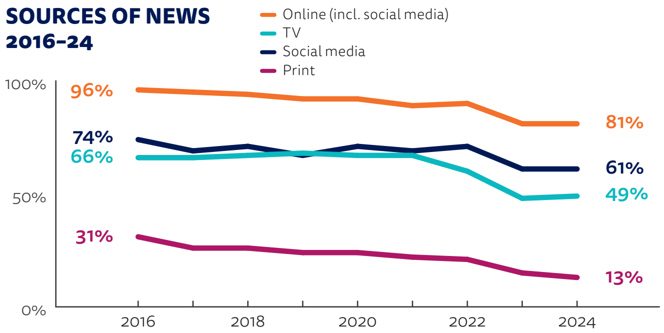
11% pay for **ONLINE NEWS**



CHANGING MEDIA

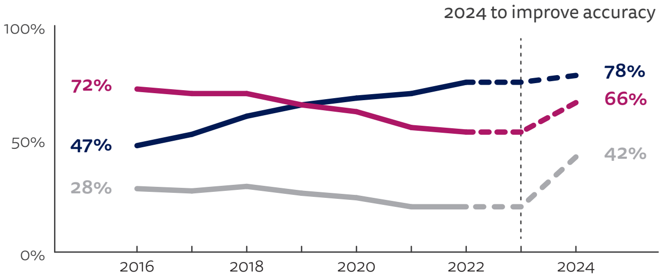
Social media sources continue to dominate over TV among online news users in Greece; print continues to decline.

SOURCES OF NEWS 2016–24



DEVICES FOR NEWS 2016–24

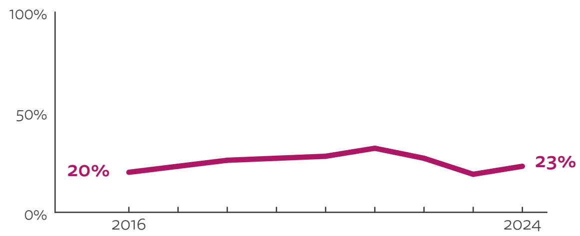
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Despite small increases in trust overall and by brand since 2023, Greece still has the lowest levels of trust in news across 47 markets. Trust is low across all groups, but even lower among younger and left-wing respondents. Local and regional news is trusted more than other specific brands surveyed, highlighting the brand weaknesses of both legacy and digital-born outlets.

OVERALL TRUST SCORE 2016–24



Proportion that trusts 'most news most of the time'

23% OVERALL TRUST =47/47 markets

WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 57.15	88/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Alpha News	48%	25%	27%
Ant1 News	47%	24%	29%
Dikaiologitika.gr	54%	27%	20%
Efimerida ton Syntakton	48%	26%	25%
ERT News (public broadcaster)	53%	23%	25%
in.gr	47%	27%	26%
Kathimerini	52%	24%	24%
MEGA News	46%	23%	31%
news247.gr	48%	29%	23%
Newsbomb.gr	43%	29%	27%
Proto Thema	44%	26%	29%
Real News	46%	26%	28%
Regional or local newspaper	55%	27%	18%
SKAI News	40%	19%	41%
Ta Nea	47%	27%	25%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All	Rank	Brand	For News	For All
1	Facebook	44% (-2)	64%	4	Facebook Messenger	19% (-)	49%
2	YouTube	29% (-1)	62%	5	Viber	18% (-2)	51%
3	Instagram	20% (+2)	47%	6	TikTok	14% (+5)	31%

Population	9.6m
Internet penetration	89%

HUNGARY

After a turbulent 2022, this has been a much calmer year in the Hungarian media market. Political pressure on independent media, however, continued to grow, culminating in new regulation 'to defend Hungary's sovereignty', which may have a severe impact on media freedom.

Hungarian Prime Minister Viktor Orbán won his fourth successive term in 2022 following a media capture process, increasing his and his allies' direct influence over the media, through ownership and legal, regulatory, and economic pressures. Some independent media remain, but recent measures may mean they face a tougher environment.

Of the two major national commercial television channels, government-aligned TV2 dominated over independent RTL in the ratings, although our online survey, which is likely to be drawn more from urban areas, found that RTL was used by more people as a news source than TV2 (36% and 23%, respectively). Most Hungarians continued to consume content on linear television channels, but industry research suggests the use of subscription-based streaming services among internet users aged 18–59 increased significantly from the previous year (from 51% to 59%).[61]

While the market was relatively stable in 2023, some independent newsrooms experienced internal tension with several key journalists and editors quitting Telex.hu and 444.hu. Telex.hu completed the process to become employee-owned, a unique model in Hungary, seen by the staff as the best way to guarantee the portal's independence. In another important development, independent local news portals countrywide joined forces to cover topics of interest for larger regions together, trying to offer some alternative news sources in the countryside, which is generally dominated by pro-government media.

As for the advertising market, spending in real terms was still below the pre-COVID-19 level. While digital giants have had the largest share of the Hungarian advertising market since 2019, their share in 2023 increased only minimally from the previous year (34.3% in 2023, from 34.0% in 2022).[62] Advertising on digital platforms is not only important for businesses but also plays an important role in Hungarian politics. Telex.hu found that in 2019–23, €26.5m was spent on political ads on Facebook, which is the third highest per capita spending on such ads in the EU. A significant proportion of this spending came from a range of pro-government influencers.[63]

Our survey found no significant change in the news sources with the greatest weekly reach. RTL, TV2, and ATV still lead the list of legacy media outlets, while Index.hu, 24.hu, Telex.hu, and Origo.hu are the most widely used online news portals. Independent Telex.hu overtook pro-government Origo.hu, but a drop was registered for nearly all media outlets. Similarly with brand trust scores, the share of respondents saying they distrusted a particular brand increased for all of those listed. Half (50%) distrust the public service broadcaster.

In 2023 the authorities started implementation in earnest of the controversial 2021 'child protection act', which prohibits the 'promotion' and portrayal of homosexuality and gender-nonconformity to minors. Bookstores were fined for selling young adult literature with LGBTQAI+ characters. In October, the World Press Photo exhibition in the National Museum was closed to minors because it included some photos of the LGBTQAI+ community. Hungary's media authority ruled that RTL could only run an animated video promoting the Budapest Pride Festival between 10 pm and 5 am, and an investigation was also launched into a promotional video on YouTube for Hungary's popular Sziget Festival, because it included a brief shot of a same-sex couple kissing.

In December, after years of smear campaigns accusing independent media outlets that receive foreign funding of serving foreign interests, the Hungarian Parliament adopted a law 'to defend Hungary's sovereignty'. The ideological foundations for the law regarding the media were spelt out by Hungarian Prime Minister Viktor Orbán's political director Balázs Orbán, who told a conference in January, 'Whoever controls a country's media controls that country's mindset and through that the country itself.' While the law does not explicitly regulate the media, critics claim it may severely restrict media freedom in Hungary. It establishes a new authority that will have very broad investigatory powers, that cannot be overruled by a court, to collect information, including documents and records from other authorities, about practically any organisation or individual involved in public life it suspects of undermining Hungary's national sovereignty. International media freedom organisations warned that, while the new authority will have no power to impose legal sanctions, it will easily be able to harass and stigmatise media outlets and journalists.[64]

Judit Szakács and **Éva Bognár**
CEU Democracy Institute

[61] https://www.memeinfo.hu/system/files/researches/attachments/panelkutatas_2023_nielsenmeme_kozos_sajtokozlemeny.pdf
[62] https://mrsz.hu/cmsfiles/62/e7/2023_MRSZ_media-komm-torta_v9_teljes_final.pdf
[63] https://telex.hu/belfold/2023/12/01/politika-propaganda-fidesz-hirdetes-facebook-megafon-kormany-mediaworks
[64] https://ipi.media/hungary-draft-sovereignty-protection-act-poses-fresh-threat-to-independent-media/

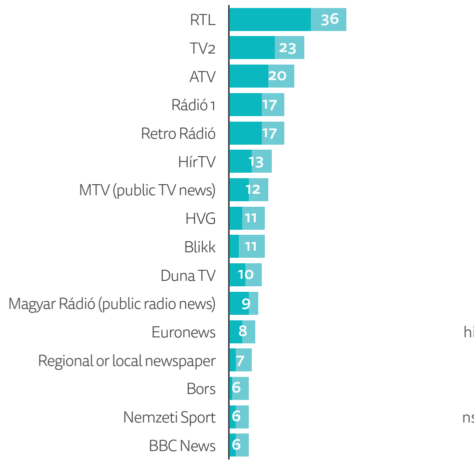
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

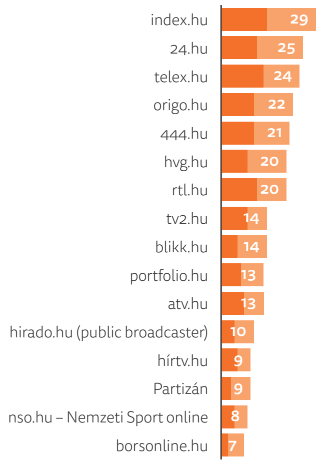
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

10% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



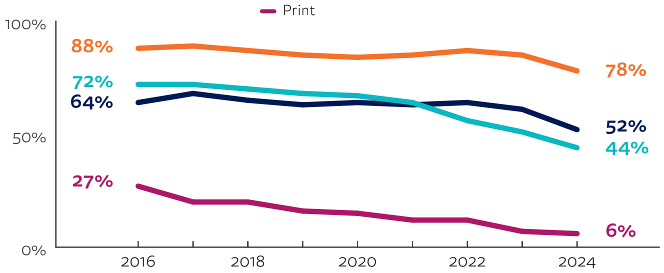
ONLINE



METHODOLOGY NOTE

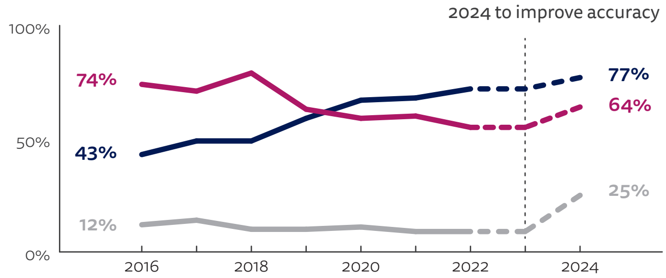
We introduced education quotas in 2023 to make data more representative of national populations. Part of the declines in reach in the sources chart between 2022 and 2023 will be because there are more people with lower levels of education in our sample now, who typically have lower interest in news.

SOURCES OF NEWS 2016–24



DEVICES FOR NEWS 2016–24*

No data for 2023; question reformulated in 2024 to improve accuracy

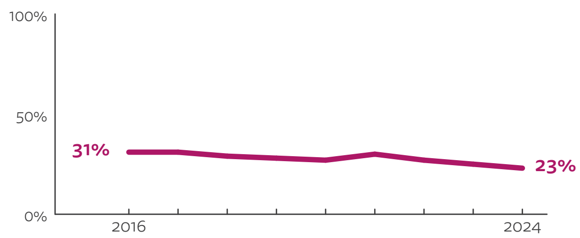


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

With pro-government media spreading propaganda on the one hand, and independent media stigmatised as serving foreign interests on the other, overall trust in news continued to decrease, with Hungary now ranking the lowest in the survey, along with Greece. While TV2 led industry viewing charts on most days in 2023, over half of respondents to our survey said they did not trust it.

OVERALL TRUST SCORE 2016–24



Proportion that trusts 'most news most of the time'

23% **OVERALL TRUST =47/47 markets**

RSF REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 62.98	67/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
24.hu	41%	29%	30%
444.hu	38%	27%	35%
ATV	41%	25%	34%
Blikk	21%	26%	53%
HírTV	32%	24%	44%
HVG	50%	24%	26%
Index.hu	38%	28%	34%
Magyar Nemzet	32%	28%	41%
MTV (public television)	30%	20%	50%
Népszava	33%	32%	35%
Origo.hu	30%	26%	44%
Regional or local newspaper	35%	29%	35%
RTL	49%	23%	28%
telex.hu	45%	27%	28%
TV2	27%	22%	52%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	47% (-6)	70%
2	YouTube	25% (-3)	66%
3	Facebook Messenger	11% (-1)	59%

Rank	Brand	For News	For All
4	TikTok	9% (-)	27%
5	Instagram	6% (-1)	30%
6	X (formerly Twitter)	3% (-2)	7%

Population	5m
Internet penetration	92%

IRELAND

The cost and purpose of public service media (PSM) have been debated across the nation this year while a payments scandal at Raidió Teilifís Éireann (RTÉ) has unfolded. The scandal began in July 2023 when the Grant Thornton accountancy firm uncovered that secret payments had been made by the former management to boost the pay of a star presenter.

This and further revelations have meant that RTÉ has scarcely been off the front pages of the newspapers and online media outlets. The previous director-general Dee Forbes stands accused of a number of breaches of corporate governance and these decisions have been scrutinised regularly on live television by the Media Committee of the Irish Parliament.

While Ms Forbes has pleaded too ill to attend the sessions, the incoming director-general Kevin Bakhurst has had to help uncover and explain the decisions made by the previous management team. These decisions have included high exit payments to departing staff and chronic overspending on loss-making programming.

Media analysts, politicians, and the public have subsequently questioned the very necessity of PSM in a changing digital landscape.[65] RTÉ is a 'semi-state company' and most of the problems centre around its commercial activities; however, the degree to which public money has been squandered is also being questioned.

In terms of consumption though, RTÉ News still tops the chart for the most used news source in the categories of 'TV, radio, and print' and 'online' and retains very high trust levels. More disturbing for RTÉ, however, is the fact that the number of TV licence fees bought last year fell by 13%, a drop of over 123,000 compared to 2022.[66] This has resulted in a loss of almost €22m. A proposed government bailout of RTÉ is now contingent on cost-cutting. So far RTÉ has announced plans for salary caps and 400 redundancies.

In late November serious riots broke out in central Dublin that included attacks on the Gardai (Irish police) and members of the public causing over €20m of damage. The riots began after an assailant stabbed four members of the public, including young children. News that he was of Algerian origin spread quickly on social media and anti-immigrant crowds and general rioters joined in the fray. Social media have been used increasingly by right-wing activists to stir up resentment of migrants.

In February the EU's Digital Services Act (DSA) was introduced in Ireland, requiring online platforms to do more to remove illegal content and counter the impact of disinformation disseminated through their services. The Irish media regulator, Coimisiún na Meán is responsible for enforcing the DSA in Ireland, alongside the EU, and has set up a contact centre to advise the public on their rights and escalate complaints under the legislation. Platforms that are repeat offenders can face heavy fines and EU-wide bans. Meanwhile artificial intelligence companies OpenAI and Anthropic are establishing bases in Dublin. OpenAI's office will be responsible for the company's data privacy and oversight and will provide services such as ChatGPT across Europe.

According to a PwC report[67] (November 2023), newspaper publishers will see an increase in revenues from digital media by 2027, but this upturn will not make up for the expected decline in print sales. The country's newspaper market was worth €379m in 2022 and is forecast to fall to €288m in 2027.

The chief executive of Mediahuis Ireland, Peter Vandermeersch, publisher of titles including *The Irish Independent*, announced 50 job cuts while repeating his mantra that the news industry is shifting from print to digital under a plan known as 'Digital-only 2030'. This will involve an eventual disappearance of printed newspapers from Monday to Friday.

The Irish radio sector meanwhile appears to be in relatively good health, according to figures from the industry body Radiocentre Ireland which boasted advertising revenues of €164m in 2023, with digital audio revenue up 33% to €7.2m (excluding global brands). Coimisiún na Méan has also announced funding of €2.4m to independent radio stations to aid digital transformation and for programmes with equality inclusion themes. This year it is also introducing a Local Democracy Reporting Scheme and a Courts Reporting Scheme.

Professor Colleen Murrell
Dublin City University

[65] David McWilliams, 'We are Witnessing the Death Throes of RTÉ. I Say This with a Heavy Heart', *Irish Times*, 2 Mar. 2024. https://www.irishtimes.com/opinion/2024/03/02/we-are-witnessing-the-death-throes-of-rte-i-say-this-with-a-heavy-heart/
[66] 'Tell us your Story: Why did you Stop Paying the TV Licence Fee?', *Irish Times*, 13 Feb. 2024. https://www.irishtimes.com/media/2024/02/13/tell-us-your-story-why-did-you-stop-paying-the-tv-licence-fee/
[67] 'Ireland's Entertainment & Media Outlook 2023–2027', PwC, 6 Nov. 2023. https://www.pwc.ie/media-centre/press-releases/2023/entertainment-media-outlook-2023-2027.html

WEEKLY REACH OFFLINE AND ONLINE

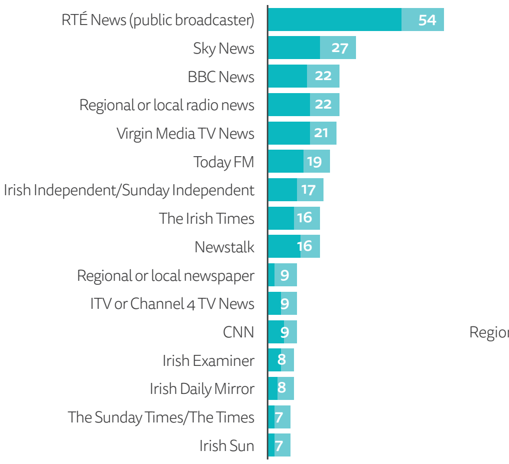
TOP BRANDS

% 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

17% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT

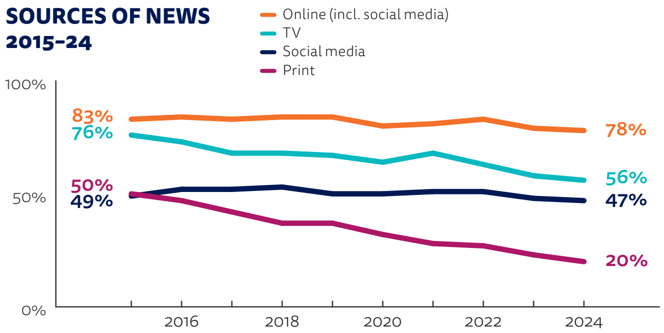


ONLINE

CHANGING MEDIA

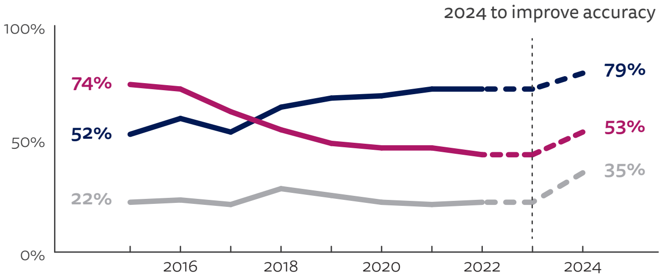
After a slight COVID bump, TV continues its long-term decline as a news source. Print has been hit even harder with use now well under half the level of 2015.

SOURCES OF NEWS 2015–24



DEVICES FOR NEWS 2015–24

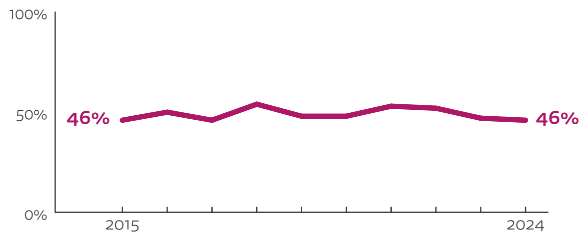
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

While overall trust in news is down 7 percentage points since the height of the COVID-19 pandemic, it is relatively unchanged this year. At the brand level, trust in RTÉ News appears unaffected by the recent scandal, with it at 72%, level pegging with *The Irish Times*.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

46% OVERALL TRUST 13/47 markets

REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 85.59	8/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
BBC News	68%	18%	14%
Breakingnews.ie	58%	27%	16%
Irish Daily Mail	44%	25%	31%
Irish Daily Mirror	41%	27%	33%
Irish Examiner	64%	23%	12%
Irish Independent	68%	19%	13%
Newstalk	66%	21%	13%
Regional or local newspaper	69%	20%	11%
Regional or local radio	71%	18%	11%
RTÉ News	72%	14%	14%
Sky News	65%	19%	16%
The Irish Times	72%	16%	13%
TheJournal.ie	60%	25%	15%
Today FM	66%	23%	11%
Virgin Media News	64%	22%	14%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

43% listened to **PODCASTS** in the last month

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	29%	(-1)	59%
2	YouTube	23%	(+4)	55%
3	WhatsApp	22%	(+1)	69%

Rank	Brand	For News		For All
4	Instagram	17%	(+2)	42%
5	X (formerly Twitter)	13%	(-2)	21%
6	TikTok	10%	(+1)	22%

Population	60m
Internet penetration	91%

ITALY

The Italian media system is in a state of flux. Historically characterised by a dominant television sector, a weaker yet influential press, and a slower digital transformation than elsewhere, today the media landscape sees television losing its primacy, major publishers selling traditional print outlets, and digital-born outlets seriously challenging established players.

Italian television remains highly popular, yet its role as a primary source of news is steadily diminishing, with a decline from 85% in 2017 to 65% in 2024, as shown by our survey. Age matters, with just 50% of younger respondents (18–24) using TV for news weekly. The market retains a significant level of concentration, with the three major broadcasters – the PSB RAI and the commercial players Sky and Mediaset – accounting for approximately three-quarters of the total revenues in the television sector.

Online advertising displaced TV's leadership in recent years, and by 2022 accounted for over half (58%) of overall advertising revenues, with television and print accounting for 29% and 5% respectively. However, online advertising's growth is not providing a lifeline for the struggling news industry. Publishers generate just a minor portion (15%) of digital advertising revenues, with online platforms such as Alphabet/Google and Meta/Facebook garnering the lion's share (85%).[68]

The structural crisis of the newspaper sector is accelerating, primarily due to a consistent decline in copies sold (-37% from 2019 to 2023) and advertisers' increasing preference for other media platforms. Most newspapers responded by implementing paywall solutions, while some digital-native outlets such as Il Post, Open, and Linkiesta have recently introduced membership models. However, our survey shows little or no change in the proportion paying for online news each week – just 10%. While the digital replicas of printed newspapers are prioritised by publishers because they are priced higher than access to news via websites and apps, they still account for a tiny proportion of total sales.

The impact of digital disruption is also clear from shifts in the online reach of news brands. Until 2016–17, legacy players – both broadcasters and newspapers – largely dominated the Italian online news market. However, new brands started to challenge more established players in recent years, with Fanpage (a digital-born outlet with a strong social media presence) returning in 2024 to the position first attained in 2022 of being the leading online brand by reach in our survey. Il Post is another example of a digital-native player challenging more established newspapers' positions.

The newspaper market is less concentrated than the television sector. GEDI and Cairo/RCS, the two main publishing groups, jointly account for 38% of the total copies sold in 2023, while other publishers each contributed less than 10%. Major changes occurred within the GEDI group after its acquisition in 2020 by the Agnelli-Elkann family, the largest shareholder in the car conglomerate Stellantis. Following the takeover, GEDI sold its flagship newsmagazine *L'Espresso* and most of the many local newspapers the group was known for. Recently, journalists went on strike in protest against the proposed sale of their few remaining local outlets. Journalists at *La Repubblica* have also criticised the group for softening the paper's traditional centre-left stance, a new editorial strategy which they argue alienates its traditional audience without attracting new readers.[69] GEDI's recent acquisition of influencer-focused marketing companies (Stardust) and online outlets based on social media distribution (cronachedispogliatoio.it) also testify to a change in the group's priorities.

Takeovers are also occurring among centre-right newspapers. Antonio Angelucci, a right-wing MP, businessman with stakes in private healthcare, and owner of the conservative papers *Libero* and *Il Tempo*, has recently bought the newspaper *Il Giornale* from the Berlusconi family and, at the time of writing, is in negotiations for the acquisition of AGI, the second-largest news agency in Italy, previously owned by the energy conglomerate Eni. The possible takeover of AGI has also sparked concerns and led to strikes among AGI journalists.

The closure of news kiosks, the Italian outdoor stands where print newspapers have traditionally been sold, also testifies to the severity of the crisis of the Italian news industry. Nearly 2,700 news kiosks disappeared across the country in four years, with the total number dropping to approximately 13,500 by 2023.[70] Finally, the ending from January 2024 of the obligation to publish tender and public contract information in newspapers, known as 'legal advertising', poses a new challenge, with newspapers facing losses in revenue estimated at around €40m annually. Despite pressure from publishers, the government refused to postpone the implementation of the new system.

Alessio Cornia
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[68] https://www.agcom.it/relazioni-annuali
[69] https://www.repubblica.it/economia/2023/12/15/news/repubblica_assemblea_redattori_piano_tagli-421671830/
[70] https://mailchi.mp/6781c4b58de9/digital-media-sunday-brunch?e=05a6f96f40

WEEKLY REACH OFFLINE AND ONLINE

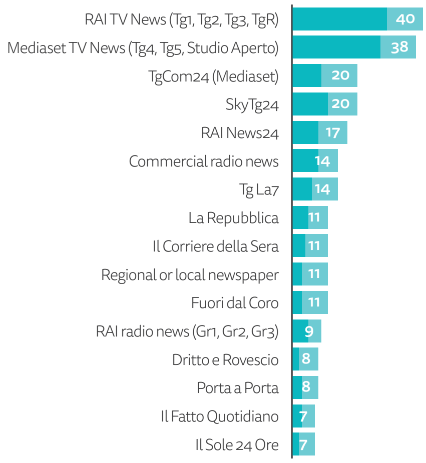
TOP BRANDS

% Weekly usage

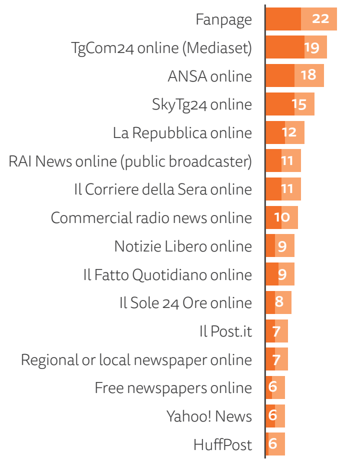
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

10% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



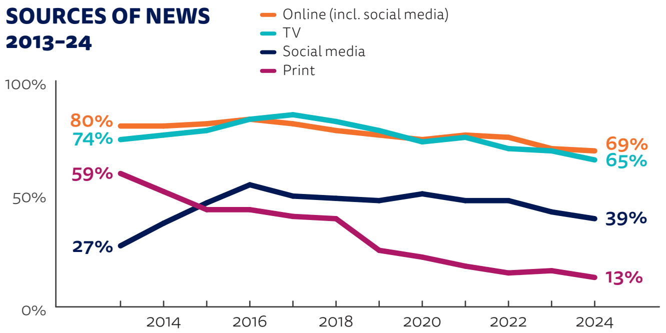
ONLINE



CHANGING MEDIA

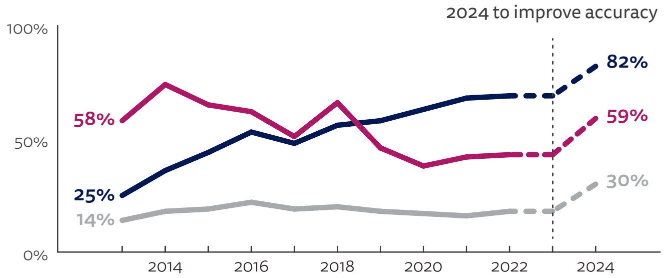
Weekly reach for TV news has declined with printed newspapers at just 13%, one-third the level of 2018. Social media use for news is down, driven by a drop in Facebook use as news source.

SOURCES OF NEWS 2013–24



DEVICES FOR NEWS 2013–24*

No data for 2023; question reformulated in 2024 to improve accuracy

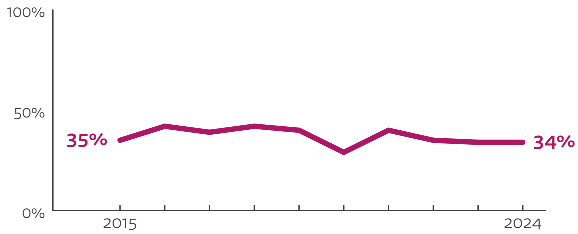


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Trust in the news remains low (34%). The most trusted brands are generally those seen as less partisan, while those with a clear partisan bias tend to command lower trust. The lower scores of digital-born players like Fanpage and Il Post may be because they have had less time to build a reputation.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

34%
OVERALL TRUST =31/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
ANSA	75%	16%	9%
Fanpage	42%	29%	29%
Il Corriere della Sera	61%	24%	14%
Il Fatto Quotidiano	53%	27%	20%
Il Giornale	46%	29%	24%
Il Sole 24 Ore	67%	22%	11%
IlPost.it	42%	38%	19%
La Repubblica	58%	24%	18%
La Stampa	54%	28%	18%
Libero Quotidiano	43%	29%	29%
Mediaset News	58%	20%	22%
RAI News (public broadcaster)	58%	21%	20%
Regional or local newspaper	60%	25%	14%
SkyTG24	69%	20%	11%
Tg La7	62%	23%	15%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 69.8	46/180

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

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	37%	(-7)	62%
2	WhatsApp	25%	(-2)	78%
3	YouTube	20%	(+1)	59%

Rank	Brand	For News		For All
4	Instagram	20%	(-)	50%
5	TikTok	9%	(+1)	24%
6	Telegram	8%	(-1)	26%

Population	17m
Internet penetration	95%

NETHERLANDS

The Netherlands continue to be dominated by a strong PSB and two Belgian-owned media companies, and there is risk of further media consolidation. The past year was marked by an investigation into workplace safety within the PSB. A former Instagram meme page has turned into a popular news source for young people, raising concerns about misinformation and polarisation.

The Dutch media landscape continues to be characterised by a high degree of media concentration. Three players dominate the media market: public service broadcaster NOS and two Belgian publishers DPG Media and Mediahuis, which together own the majority of the Dutch newspapers.

Further market consolidation seems imminent, as DPG Media signed an agreement with the RTL Group to acquire RTL Nederland and streaming platform Videoland for €1.1bn. Already the largest media company in the Netherlands, this move would add the TV market to DPG Media's activities in print, radio, and online. The Netherlands Competition Authority (ACM) has yet to approve the acquisition. Previously, in 2023, the regulator blocked RTL's acquisition of Talpa Network (which includes SBS TV), arguing that the merger would make RTL powerful enough to set TV advertising rates. However, since DPG Media currently does not own any Dutch television stations, their acquisition of RTL is likely to be approved. Meanwhile, Mediahuis plans a major reorganisation, merging its different branches Mediahuis Nederlands, Mediahuis Limburg, and Mediahuis Noord into one organisation. Critics have voiced concerns about this wave of takeovers and mergers, asking for guarantees that the editorial independence and the plurality of the news will be safeguarded.[71]

Most (commercial) online news brands have a freemium business model, presenting their premium content behind a paywall in the hopes of attracting subscribers. DPG Media also bundles their content: anyone subscribing to one of their titles gets additional access to ten other (national and regional) newspapers under the DPG umbrella.

In addition to remaining the top brand offline (no. 1) and online (no. 2) in terms of access, as well as the number 1 most trusted brand among those included in our survey, public news service NOS continues to successfully reach younger audiences on social media. Most notably, on Instagram, both their main account NOS and their initiative aimed specifically at 13-to-18-year-olds NOS Stories have – respectively – near and over a million followers. On YouTube, NOS op 3 is especially popular: this channel dedicated to weekly 10–20 minutes explainer videos has around half a million followers. However, on Instagram, the mysterious player 'cestmocro' has also grown very popular, passing its millionth follower in the past year. It is still unclear who is behind this initiative. Starting out as a meme page in 2017, it has since pivoted to news, mainly reposting (with credit) and summarising content from mainstream sources such as NOS, RTL Nieuws, CNN, and Al Jazeera. However, 'cestmocro' has also been criticised for occasionally posting misinformation and failing to moderate hateful reactions in the comment section. Faced with criticism for adopting a one-sided, pro-Palestine perspective on the Israel-Hamas war, 'cestmocro' responded that they 'choose the perspective of the repressed and not the oppressor'.[72]

Despite three sanctions for spreading disinformation and bringing the Dutch public broadcaster into disrepute, the Secretary of Culture and Media had decided against revoking the licence of aspirant PSB Ongehoord Nederland (ON) (Unheard Netherlands). Claiming to give a voice to those unrepresented by existing broadcasters and to add a 'critical voice' on such issues as globalisation and immigration, ON became an 'aspirant' broadcaster in 2022, guaranteeing them public funding and airtime. Its run has been riddled with controversy, with their early broadcasts drawing formal complaints about disinformation and racism. The NPO – the umbrella administrative body for all public broadcasting services in the Netherlands – was allowed to request revocation of ON's licence after the third sanction, but the Secretary argued the problems weren't 'manifest and structural' enough to justify a revocation.

In early 2024, the Investigative Committee on the Conduct and Culture of Broadcasters released their report on workplace safety and culture at the Dutch public broadcaster NPO. After sexual misconduct at commercial broadcasters was reported in 2022, the following year saw high-profile scandals at the NPO, including workplace bullying at a popular daily talk show, and bullying, (sexual) intimidation, and discrimination at the sports division of PSB news channel NOS. The report concluded that unacceptable behaviour is widespread at the NPO, with 75% of their respondents indicating they have been a victim or a witness in the past year. The committee's recommendations included paying more attention to developing leadership skills, avoiding temporary contracts, and professionalising HR.[73]

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Vrije Universiteit Amsterdam

[71] https://www.cvdm.nl/wp-content/uploads/2023/10/CvdM-Mediamonitor-2023.pdf
[72] https://www.instagram.com/p/CyYHDV0Ko4k/?img_index=1
[73] https://ogco.nl/actueel/niets-gezien-niets-gehoord-niets-gedaan-de-zoekgemaakte-verantwoordelijkheid

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

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

15% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT

Brand	%
NOS Nieuws (TV and radio) (public broadcaster)	57
RTL Nieuws (incl. RTL Z and EditieNL)	30
SBS Nieuws (Hart van Nederland)	22
Other NPO TV news programmes	17
Local or regional daily newspaper	16
Commercial radio news	16
Free local papers	15
Algemeen Dagblad (AD) and regional editions	15
De Telegraaf	14
Regional TV news	11
Regional radio news	10
de Volkskrant	8
Non-daily regional or local newspaper	6
BBC News	6
BNR Nieuwsradio	6
CNN	5

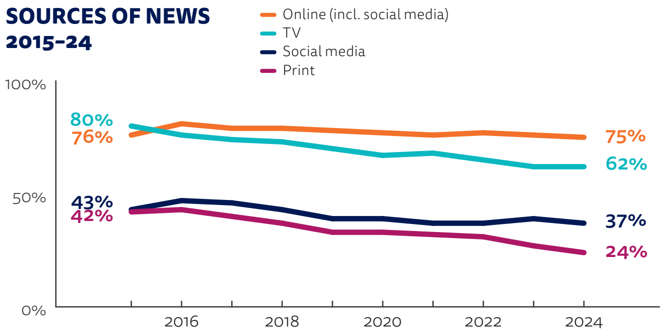
ONLINE

Brand	%
NU.nl	45
NOS Nieuws online	32
Algemeen Dagblad (AD) online	28
RTL Nieuws online	20
De Telegraaf online	19
Regional or local TV news online	12
SBS Nieuws online	9
Regional or local newspaper website	9
de Volkskrant online	8
Indebuurt.nl	6
Nederlands Dagblad online	6
MSN News	5
Metro News online	5
NRC online	5
BBC News online	5
Linda Nieuws	5

CHANGING MEDIA

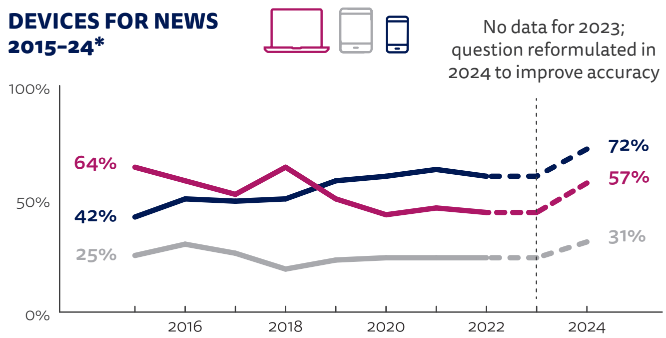
Public service broadcaster NOS and free, ad-driven news site NU.nl maintain their dominance. While Facebook has decreased as a news source, video-focused platforms YouTube, Instagram, and TikTok are slightly up.

SOURCES OF NEWS 2015–24



DEVICES FOR NEWS 2015–24*

No data for 2023; question reformulated in 2024 to improve accuracy

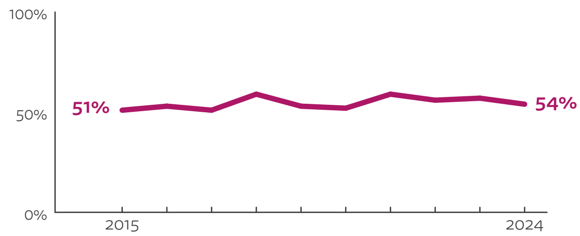


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Trust in news has been fairly stable over the past year, although a slight drop (3pp) causes the Netherlands to drop five spots to ninth in the overall country rankings. Despite several scandals at the public service broadcaster, NOS Nieuws continues to rank as the most trusted source among those included in our survey.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

54% **OVERALL TRUST =9/47 markets**

REPORTERS WITHOUT BORDERS — WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 87.73	4/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Algemeen Dagblad (AD)	74%	17%	9%
BNR Nieuwsradio	63%	26%	11%
De Telegraaf	57%	21%	22%
De Volkskrant	70%	20%	10%
GeenStijl	30%	29%	42%
Hart van Nederland (SBS Nieuws)	60%	22%	18%
Het Financieele Dagblad	68%	22%	9%
Linda News	36%	35%	30%
Metro	56%	30%	14%
NOS Nieuws	82%	10%	8%
NRC	66%	23%	10%
NU (Nu.nl)	74%	18%	8%
Regional or local newspaper	76%	17%	7%
RTL Nieuws	74%	16%	9%
Trouw	66%	23%	11%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	22%	(-5)	55%
2	WhatsApp	19%	(+2)	75%
3	YouTube	16%	(+2)	50%
4	Instagram	13%	(+2)	41%
5	X (formerly Twitter)	7%	(-)	13%
6	TikTok	6%	(+2)	18%

Population	5.5m
Internet penetration	98%

NORWAY

The Norwegian media landscape combines strong national legacy brands and public service media, with a reputation for innovation in content and business models. Willingness to pay for news remains high among the population, but this year also saw severe cuts and restructuring among commercial news providers.

Norwegian consumers are again those most willing to pay for news across all 47 countries surveyed this year. The proportion of paying users (40%) seems to be levelling out though. Norway has a strong newspaper reading tradition, and the transition to digital subscriptions has been promoted with hybrid solutions that typically bundle paper and digital content and by publishers' willingness and ability to focus on a long-term approach to growing their subscriber base. This, and the absence of freesheets, helps to explain the relative success of online news payment.

The top national titles that our respondents said they were subscribing to online remained *VG*, *Aftenposten*, and *Dagbladet*. But a new addition to Norwegian's subscription menu is bundled subscriptions providing access to all newspapers owned by media conglomerates. Alt+ from local news owner Amedia and Schibsted's bundle Full Tilgang are both having some success with 10% and 6% of subscribers respectively choosing them.

Results from the third quarter of 2023 suggest a slightly better year for the newspaper industry. However, there are some clouds on the horizon. It is hard to get young adults to subscribe - the average age of Amedia's subscribers is 50. Several local newspapers have also reduced the frequency of their print editions, because of readers moving online and high printing costs. Leading tabloid *VG* also stopped print distribution to some parts of Northern Norway, saying it is no longer economically sustainable.

TV 2, the second-largest national television brand, announced major cuts: 400m NOK (€34m) with 45–50 redundancies. The company blamed increased costs for production and content, a weaker currency, tougher competition, and investment in new technology. Another cause is probably linked to the government's introduction of VAT on video news in 2022, but not on written news and photographs. The change was designed to keep streaming services such as Netflix outside the VAT exemption, a longstanding media policy in Norway. The change will cost TV 2 150m NOK (€13m) annually. Late 2023 also saw the national news agency NTB announcing substantial redundancies of 147 full-time equivalent posts, due to revenues being down by 10%. In addition, reforms to modernise the press subsidy scheme were introduced, providing changes in the criteria for support and more support for local news media. These reforms were designed to adapt subsidies to the digital era but have been criticised for their design by companies and media researchers.

In December Schibsted, the major media conglomerate, announced a formal separation between its news operations and the rest of its activities. In Norway Schibsted owns the largest tabloid *VG*, the largest broadsheet *Aftenposten*, regional newspapers, and legacy news titles in neighbouring countries. Schibsted's most successful digital business is primarily in online classified ad sites. The new entity, provisionally called Schibsted Media, will house the editorial news businesses, while the profitable digital ads services will go to a separate entity called Schibsted Marketplaces. Commentators have welcomed the fact that the news operation will be owned by a trust – but there is concern about future income streams, and whether hiving off tech and data analysis expertise might weaken the news operation.

The year has also been marked by multiple political scandals. At the end of the year, the war in Ukraine was overshadowed by Hamas's attack on Israel, and Israel's subsequent invasion of Gaza. The coverage of the conflict prompted a vigorous debate about whether mainstream news media were biased. *VG* was criticised for being pro-Israel in a high-profile letter by a well-known artist, while NRK received numerous complaints following jokes about the victims in Gaza on a news satire show in October.

Publicly funded NRK remains a strong presence in Norwegian news as the most trusted brand compared to the others surveyed, the most used offline brand and even strengthening its position online in weekly usage this year. A major press ethics scandal – involving a high-profile television documentary (*Bamsegutt*) that got withdrawn following public and journalistic scrutiny – has thus apparently not damaged the PSM's reputation. NRK has also positioned itself as a frontrunner in the use of AI in news production. In the project *Norge i rødt, hvitt og grått*[74] (Norway in red, white and grey), AI-analysed satellite photos of the Norwegian landscape from 2017 to 2022 showed the environmental degradation caused by the expansion of roads, industry, etc.

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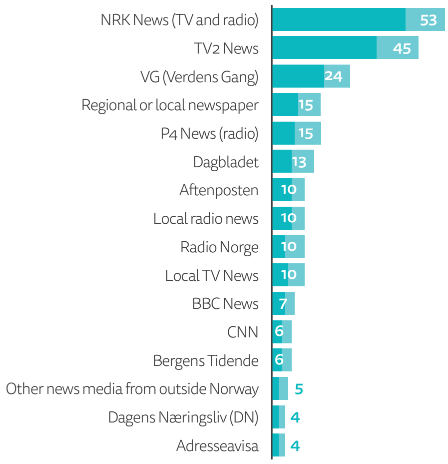
[74] https://www.nrk.no/dokumentar/xl/nrk-avslorer_-44.000-inngrep-i-norsk-natur-pa-fem-ar-1.16573560

WEEKLY REACH OFFLINE AND ONLINE

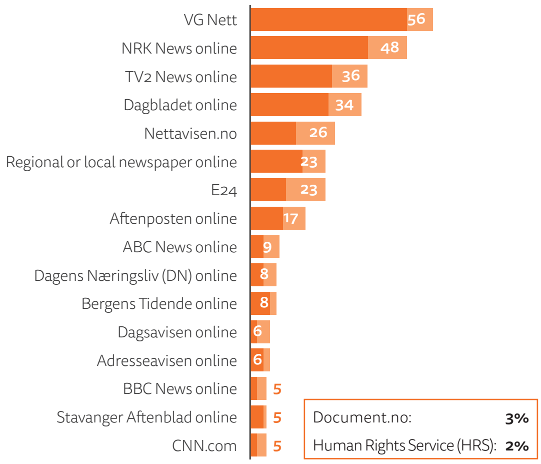
TOP BRANDS
% Weekly usage

- 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

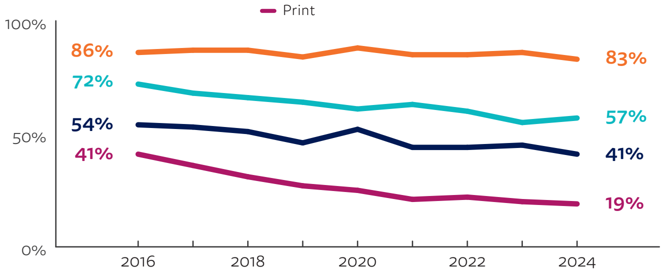


40% pay for **ONLINE NEWS**

CHANGING MEDIA

The decline of TV and print seems to have flattened out, but social media fell 4pp this year, likely as a result of Facebook's algorithms deprioritising news.

SOURCES OF NEWS 2016–24



DEVICES FOR NEWS 2016–24

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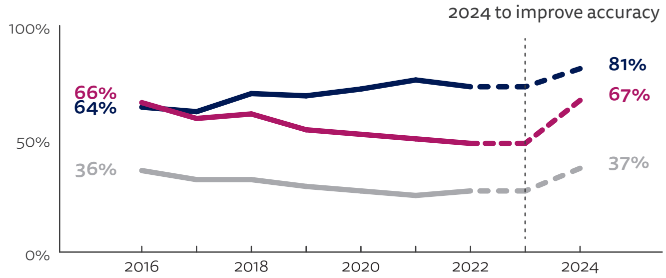
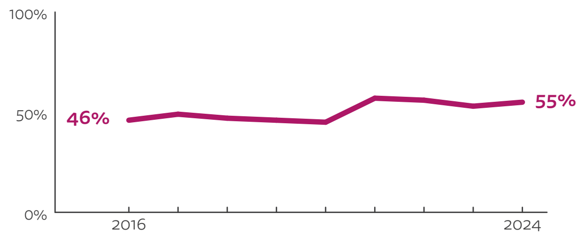


TRUST

This year's survey shows a very slight increase in overall trust levels (55%, +2pp), which is also reflected at brand level. So-called alternative media site Document.no, granted governmental press subsidies for the first time, saw a 7pp increase in trust, but still ranks significantly below established news providers.

OVERALL TRUST SCORE 2016–24



Proportion that trusts 'most news most of the time'

55% **OVERALL TRUST =7/47 markets**

RSF REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 91.89	1/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
ABC News	44%	34%	22%
Aftenposten	71%	18%	11%
Dagbladet	53%	20%	27%
Dagens Næringsliv	70%	20%	10%
Document.no	35%	27%	38%
E24	65%	23%	12%
Klassekampen	50%	27%	22%
Local radio news	66%	22%	12%
Nettavisen	56%	25%	19%
NRK News (public broadcaster)	80%	10%	10%
P4	60%	26%	14%
Radio Norge	56%	28%	16%
Regional or local newspaper	75%	15%	10%
TV2 News	76%	13%	12%
VG	67%	16%	16%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

42% listened to **PODCASTS** in the last month

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	25%	(-4)	65%
2	YouTube	13%	(-)	47%
3	Snapchat	11%	(-)	48%
4	Instagram	10%	(+1)	45%
5	Facebook Messenger	8%	(-1)	48%
6	TikTok	7%	(+1)	18%

Population	38m
Internet penetration	92%

POLAND

The October 2023 parliamentary elections brought a change in government in Poland, ending eight years marked by rising political pressure on independent media and the politicisation of public service broadcasting under the Law and Justice (PiS) party. This shift has left a deeply polarised media landscape and a need for significant reform.

On 20 December 2023, millions of Poles sat down in front of their televisions to watch the main news broadcast on public television. However, instead of the traditional opening sequence, a screen appeared with the words 'End of transmission'. In a dramatic move, the new government fired TVP executives and took its flagship news channel off air, citing a lack of impartiality. This unprecedented step sparked criticism from the former ruling party, who called for the defence of public media. The following day, a newly hired newsroom launched the '19:30' evening bulletin.

The boards of Polish Radio and the Polish Press Agency were also sacked. However, the legal basis for this transfer of power was shaky. The government dissolved the existing boards and created new ones with fresh leadership, arguing the previous administration used public media as a 'propaganda arm'.[75] Dismissed journalists returned as managers, and a recruitment drive brought a surge of new personnel. Human rights organisations criticised the way the changes were handled.[76] This turmoil also benefited the former niche channel, TV Republika. It capitalised on the situation by recruiting sacked pro-PiS presenters from TVP and now enjoys a 10% weekly reach amongst our respondents.

The new government aims to depoliticise the National Broadcasting Council (KRRiTV), currently dominated by former PiS representatives. However, KRRiTV has responded by hardening its stance, imposing a 550,000 złoty (€127,477) fine on TVN, the largest commercial broadcaster, for airing a film about sexual abuse in the church. The National Media Council (RMN), also dominated by PiS, exacerbated the situation by appointing a new TVP CEO after the government's dismissal of the board.

Other political strongholds are Orlen Press, the largest group of regional daily newspapers in Poland, and Ruch, the second-largest newspaper distributor. Both are currently owned by the state-owned oil company Orlen. Following a change in management, the oil giant has begun exploring options to divest its media arm. This move reflects the challenges of adapting to a rapidly digitising market. Orlen Press closed local weeklies in 2023, and its news portal, I.pl, failed to compete with other general portals like Onet and Wirtualna Polska.

Meanwhile, major private players are focusing on digital strategies. Onet, owned by Ringier Axel Springer Polska, made another attempt to revitalise its subscription offer and introduced the 'Onet Premium' package, while Wirtualna Polska acquired Audioteka, a leading audiobook provider, for €13.8m.

The declining circulation of printed newspapers has also forced independent publishers to make difficult decisions. The publisher of the influential independent weekly *Polityka* closed the magazine *Forum*, which had been published for 58 years and reprinted articles from foreign newspapers. *Gazeta Wyborcza*, one of the leaders in digital subscriptions in Europe, laid off 180 people in the first quarter of 2024. However, its owner, Agora Group, completed the acquisition of the controlling stake in Radio Zet, the second-largest commercial radio broadcaster, for about €9.17m. The acquisition has been blocked since 2021 on the grounds of competition concerns which were generally seen as politically motivated.

The television market saw a declining audience for major broadcasters, paving the way for streaming services to gain further traction. New players like SkyShowtime (a Comcast and Paramount Global joint venture) entered the market, while established players like Wirtualna Polska, TVN, and Rakuten launched new FAST (free ad-supported streaming television) channels. Interestingly, unlike Western markets struggling to finance new TV productions, Polish services continued to increase spending on original content.

Further contributing to the dynamic rise of digital video was the launch of Kanał Zero on YouTube by former sports journalist Krzysztof Stanowski. The channel quickly gained traction, attracting not only prominent journalists and experts but also high-profile guests typically featured on major news outlets. Notably, its launch on 1 February 2024 featured an interview with the President of Poland, Andrzej Duda. By March 2024, Kanał Zero had amassed an impressive subscriber base of 970,000, outpacing an unexpected competitor – the lower house of the Polish Parliament, the Sejm.[77] The Sejm's official YouTube channel, nicknamed Sejmflix, saw a surge in subscribers, reaching 650,000 in just a few weeks. This is five times more than the subscriber base of Germany's Bundestag channel.

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

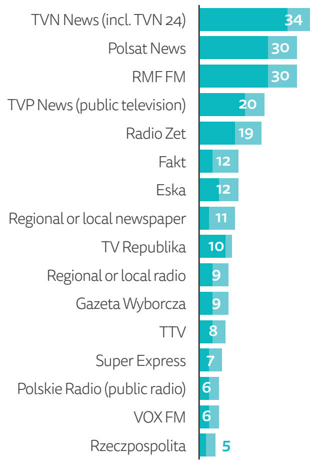
[75] https://www.ecpmf.eu/media-freedom-at-a-crossroads-journalism-in-poland-faces-uncertain-future-ahead-of-election/
[76] https://www.bbc.com/news/world-europe-67828421
[77] https://www.ft.com/content/3d3bc484-b206-4383-b24b-408e50f9fc91

WEEKLY REACH OFFLINE AND ONLINE

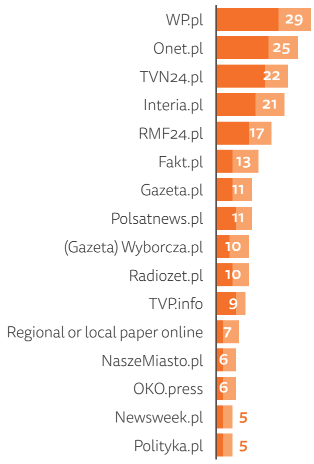
TOP BRANDS
% Weekly usage

- 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



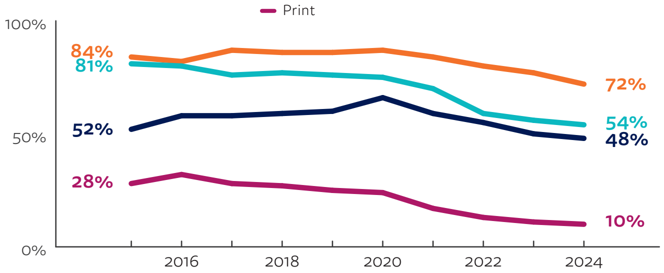
14% pay for **ONLINE NEWS**

PAY

CHANGING MEDIA

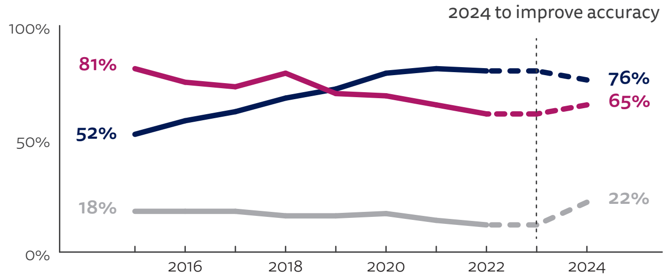
Use of all sources of news continue to decline, with print at 10% just a third of its use in 2016. Social media use for news is also down, with significant declines in Facebook use for news (-6pp).

SOURCES OF NEWS 2015–24



DEVICES FOR NEWS 2015–24*

No data for 2023; question reformulated in 2024 to improve accuracy

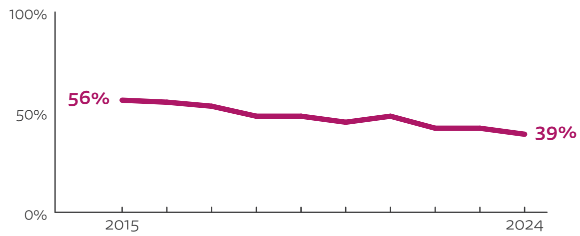


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Public trust in news media is down 17 percentage points since 2015. RMF FM remains amongst the most trusted of brands surveyed, along with Radio Zet. Notably, the Polsat News channel has seen an increase in trust scores, while Oko.press appeared in the ranking for the first time. The turmoil at TVP News has not helped improve its very low trust ratings.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

39% OVERALL TRUST =21/47 markets

RSF REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 69.17	47/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Fakt	30%	30%	39%
Gazeta Polska	31%	35%	34%
Gazeta Wyborcza	37%	29%	34%
Interia	43%	34%	24%
Newsweek Polska	40%	34%	26%
OKO.press	32%	37%	32%
Onet.pl	44%	30%	26%
Polsat News	48%	31%	22%
Radio Zet	49%	32%	19%
Regional or local newspaper	44%	36%	20%
RMF FM	54%	30%	16%
Super Express	28%	33%	39%
TVN News	45%	25%	30%
TVP News (public broadcaster)	29%	32%	39%
WP.pl	42%	34%	24%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

30% **SHARE NEWS** via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	42% (-6)	66%
2	YouTube	31% (+1)	61%
3	Facebook Messenger	15% (-4)	47%
4	WhatsApp	12% (-)	38%
5	Instagram	12% (-)	33%
6	TikTok	10% (-1)	25%

Population	10m
Internet penetration	88%

PORTUGAL

The Portuguese market is dominated by four major commercial media groups (Impresa, Cofina, Media Capital, Global Media) and RTP the public broadcaster, a challenging setting for the establishment of new players. Amidst discontent among journalists and issues of financial sustainability for brands, the media landscape also faces potential increased political instability.

Despite historically high trust in news figures and press freedom remaining a staple of Portuguese democracy, the rise of politically motivated disinformation and increasing polarisation may pose new hurdles to an ailing news sector. The general election held in March 2024, following the fall of the left-centrist government led by Prime Minister António Costa, was preceded by months of instability in which a caretaker government cautiously held power over a country on the brink of the most polarised election in decades. Disinformation attempts intensified and, for the first time on record, foreign electoral intervention in Portugal was detected, by actors aiming to harm the two major political parties of the centre left and centre right. A team of MediaLab Iscte researchers discovered a set of sponsored YouTube ads paid for by a foreign company,[78] which investigative journalists partnering with Bellingcat would later confirm to be related to an advertising agency in Argentina.[79]

The main Portuguese media groups continue their search for innovative approaches, trying to find solutions that take advantage of their size, synergies between their businesses and different platforms, but at a significant risk and cost. Cofina SGPS, which held Cofina Media, the owner of daily newspaper *Correio da Manhã* and Correio da Manhã TV (CMTV), ended the year with the announcement of the group's acquisition by a management buyout by a group of current and former employees, along with other investors.

The problems facing Global Media Group, owner of historical daily *Diário de Notícias*, *Jornal de Notícias*, and legacy radio broadcaster TSF, were evident from successive changes in management, wages paid late, and the collective dismissal of workers announced early in 2024.

Those working in the industry are actively expressing discontent about the deteriorating working conditions and general devaluing of journalism. The 5th National Congress for Journalists in January 2024 was attended by more than 700 people and called for a journalists' general strike, the first in 40 years. The subsequent strike, held on 15 March, affected nearly 50 news organisations, including leading brands such as SIC Noticias, CNN, TVI, and RTP.

The Associação Portuguesa de Radiodifusão (APR), representing radio stations nationwide, also held a protest led by more than 70 local radio stations, aimed at boycotting the elections by a news-reporting shutdown. This protest highlighted the particularly harsh conditions for local and regional media, worsened by inadequate state support and the imposition of rules such as an increased quota for Portuguese music to be broadcast, which the sector believes could further constrain their activity at a time when their survival is at stake.

The former government intended to update the Press Law, which some regard as outdated. For example, the current law dates from 1999 and completely ignores the impact of the digital transition and the need to protect the integrity of journalism in the digital environment. Pressure is building for a updated version that preserves editorial independence and the status of journalists as professionals. These aspects may well come into effect now that EU law requires countries to protect media independence and prevent economic and/or political interference.

In terms of economic sustainability there are several innovation frameworks currently being developed by both legacy brands and digital-born outlets. Larger brands such as *Expresso* and *Público* are focusing on branded audio using podcasts as their main tool to reach and engage users. Grupo Impresa-owned SIC TV brands now also exist as a streaming platform (OPTO) while the public broadcaster RTP continues to expand its digital presence with the free-to-use RTP Play on-demand service. Despite their smaller scale, digital-born Observador and Lisbon's local A Mensagem continue to achieve impressive levels of audience engagement.

With the looming threat of AI taking over central production processes within several industries, the discussion regarding the impact of AI on the Portuguese media ecosystem is only just beginning. Most brands, whether large or small, have still not incorporated AI technology either into their own production structures or as a way of promoting better interaction with audiences.

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

[78] https://combatefakenews.lusa.pt/medialab-indicios-de-interferencia-externa-em-anuncios-on-line-contra-ps-e-psd/
[79] https://expresso.pt/politica/2024-03-18-Anuncios-proibidos-ligam-o-Chega-a-publicitarios-subversivos-de-Javier-Milei-na-Argentina-85e0cc56

WEEKLY REACH OFFLINE AND ONLINE

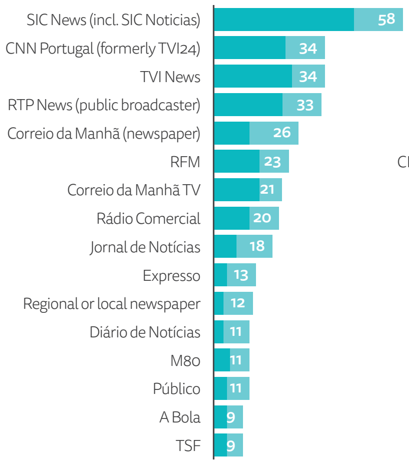
TOP BRANDS

% Weekly usage

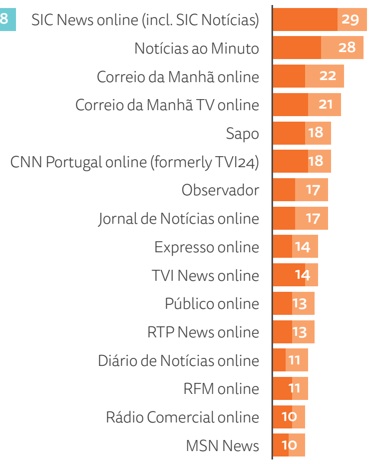
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

12% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



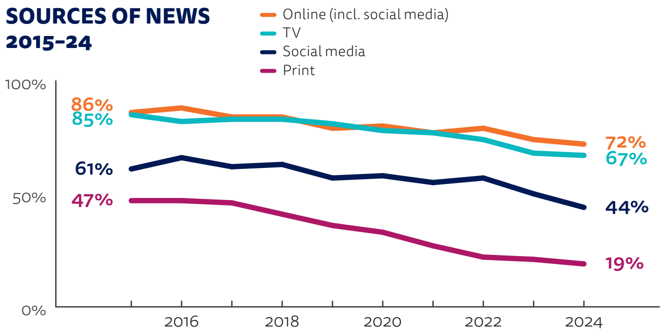
ONLINE



CHANGING MEDIA

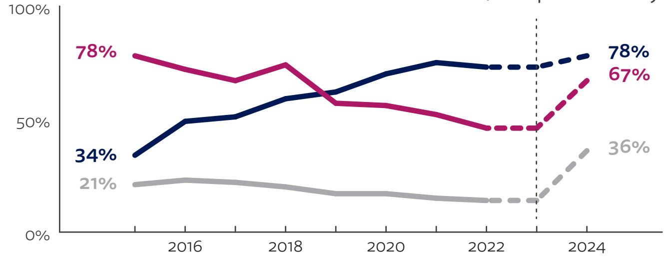
Despite a further slight fall this year, television remains the main source of news for many Portuguese, along with online sources. Social media use for news is significantly down this year (-6pp), across all networks but particularly driven by lower use of Facebook.

SOURCES OF NEWS 2015-24



DEVICES FOR NEWS 2015-24*

No data for 2023; question reformulated in 2024 to improve accuracy

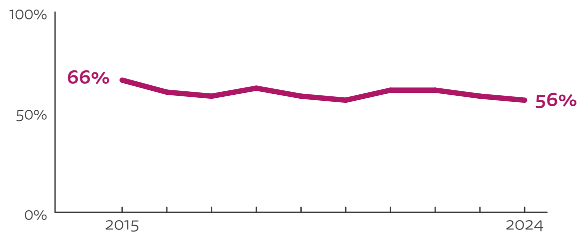


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Trust in news continues its downward path since 2022 and this year, for the first time, Portugal fell from third to sixth place out of 47 global markets. The country's persistently unstable political situation may have contributed to this drop in trust levels.

OVERALL TRUST SCORE 2015-24



Proportion that trusts 'most news most of the time'

56% OVERALL TRUST 6/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Agência Lusa	72%	19%	8%
Correio da Manhã	53%	20%	26%
Expresso	76%	16%	8%
Jornal de Notícias	77%	16%	7%
Notícias ao Minuto	68%	22%	10%
Observador	68%	21%	11%
Público	74%	18%	8%
Rádio Comercial	75%	17%	8%
Rádio Renascença	73%	18%	9%
RDP Antena 1	71%	20%	9%
Regional or local newspaper	65%	25%	11%
RTP News	79%	13%	8%
SIC News	78%	14%	8%
TSF	72%	19%	9%
TVI News	70%	16%	13%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 85.9	7/180

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

42% listened to **PODCASTS** in the last month

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	35%	(-5)	64%
2	WhatsApp	23%	(-1)	65%
3	Instagram	21%	(-2)	51%

Rank	Brand	For News		For All
4	YouTube	21%	(-2)	59%
5	Facebook Messenger	11%	(-3)	41%
6	TikTok	7%	(-2)	22%

Population	19m
Internet penetration	78%

ROMANIA

At the beginning of the busiest electoral year ever, Romanian newsrooms face high levels of distrust and significant concerns about press freedom. In the last year, parliamentary parties have tried to limit the independence of the press, prosecutors refused to pursue two cases against an investigative journalist, and a foreign media investor fired its investigative team.

In December 2023, journalists took to the streets for the first time in more than two decades. They joined with human rights activists to protest outside the General Prosecutor Office, in support of Emilia Șercan, a journalist who uncovered plagiarism in the doctoral thesis of prime minister Nicolae Ciucă (2021–3). After publishing her investigation in 2022, she was threatened by unknown people and caught in a kompromat campaign involving the police. In 2023, the prosecutors working on these cases closed both of them, as a threat against a journalist was considered 'not of public interest', and the acts in the kompromat case either 'did not exist' or 'were not provided for in criminal law'.

Newspapers *Libertatea* (generalist) and *Gazeta Sporturilor* (sports), both owned by Swiss-based Ringier, caught public attention with the firing of key staff in a dispute between journalists and management over editorial independence and ethics standards. In the summer of 2023, Mihnea Vasiliu, the CEO of Ringier Romania, left to be replaced by an interim CEO. During the autumn, several editors from *Gazeta Sporturilor* were removed by the interim CEO and then, in December, the renowned *Libertatea* investigative team, led by Cătălin Tolontan, and the editors of *Libertatea* were fired.

Journalists documented the whole process in *Libertatea*, exposing, for example, gambling companies' attempts to control the editorial content of *Gazeta Sporturilor*. For its part, Ringier referred to 'strategic restructuring' due to falling print sales – down by 27% since 2018 – and rising newsprint costs, and closed *Gazeta Sporturilor*'s print edition. *Gazeta Sporturilor* led the way in publishing an online edition, almost two decades ago, replicating its print edition, without a paywall – a model followed by most print newspapers. After the 2008 economic crisis, as audiences moved online, newspapers closed their print editions one by one, leaving Ringier with some of the last print titles.

The total advertising market has grown from €601m in 2021 to €657m in 2022 and €683m in 2023.[80] However, most of this growth has been fuelled by increased spending on digital advertising (which now accounts for 37% of the total) where it is estimated that €9 out of every €10 spent on digital advertising goes to search and social platforms. Meanwhile traditional media's share is also declining offline, TV for example had 51% of total advertising spend in 2023, down from 64% in 2019.

Political pressure on the media has increased, ahead of the busy 2024 electoral year, with local, parliamentary, presidential, and EU elections, and with the fourth largest parliamentary party, the far-right AUR party (The Alliance for the Union of Romanians) forecast to make gains. Almost half of the €45m public funds given to parliamentary parties last year was designated for 'media and propaganda'.[81] A recent EU report on the rule of law in Romania highlighted secret contracts between parties and media for political coverage, and called for their publication. The 'media and propaganda' funds may only represent about 3% of the total estimated advertising market, but can still have a powerful impact. Commentators complain that some coverage of the two main parties, now in coalition, is so positive it looks like political advertising, and that negative coverage is sometimes part of smear campaigns against political opponents, paid for by public funds.[82]

The EU report also warned further about risks to the independence of public service radio and TV. The governing boards of both institutions mainly comprise parliamentary parties' representatives, in proportion to their seats in parliament. The state budget provides most of their annual income (around €83m each for radio and TV). The public media services law requires 1% of total broadcast time to be devoted to parliamentary parties, but this is fulfilled by broadcasting speeches either in their entirety (radio) or only partially moderated (TV).

In the case of independent journalists and newsrooms, the use of intimidating actions and SLAPPs, by politicians and other individuals, who are subject to media investigations, is widespread.

Raluca-Nicoleta Radu
University of Bucharest

80 Initiative, Media Factbook. Romania 2023. https://www.mediafactbook.ro/
81 Expert Forum, Subvențiile partidelor politice în 2023: Noi recorduri. 2024. https://expertforum.ro/subventii-2023-integral/
82 ActiveWatch, *Political Parties, Money and the Media: A Toxic Relationship.* 2023. https://activewatch.ro/documents/259/freeex_digest_4_eng.pdf

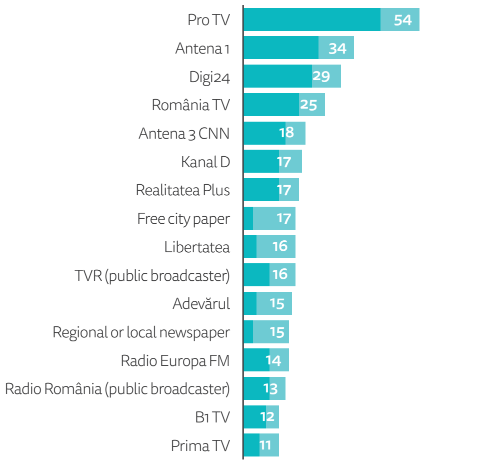
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

16% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT

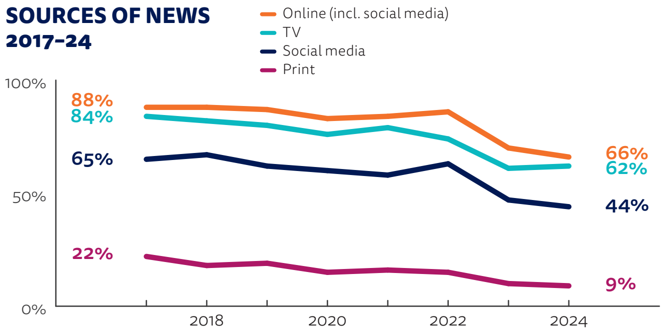


ONLINE

METHODOLOGY NOTE

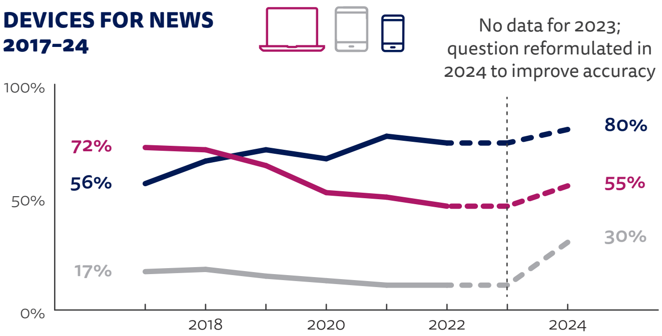
We introduced education quotas in 2023 to make data more representative of national populations. Part of the declines in reach in the sources chart between 2022 and 2023 will be because there are more people with lower levels of education in our sample now, who typically have lower interest in news.

SOURCES OF NEWS 2017–24



DEVICES FOR NEWS 2017–24

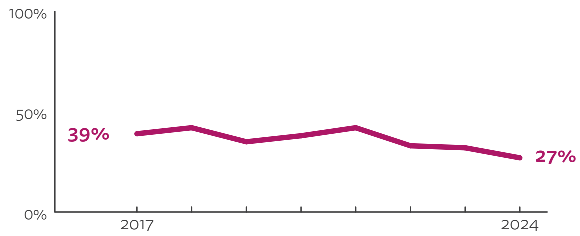
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in the news overall is amongst the lowest in our survey. Despite this, some of the most used brands are trusted by over half our sample, including commercial and public mainstream media, that strive for moderation and balance in their news coverage. ProTV, with its flagship investigative programme *Romania, I love you*, remains the most used and trusted brand for news of those surveyed.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

27% **OVERALL TRUST** =44/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Adevărul	51%	29%	20%
Antena 1	54%	22%	24%
Antena 3	50%	22%	28%
Digi 24	60%	21%	19%
HotNews	50%	27%	23%
Kanal D	50%	27%	23%
Libertatea	49%	30%	21%
Pro TV	65%	19%	15%
Radio România	60%	23%	17%
Realitatea Plus	46%	26%	29%
Regional or local newspaper	52%	30%	18%
România TV	44%	24%	32%
Stiri pe surse	50%	28%	22%
TVR (public broadcaster)	59%	23%	18%
Ziare.com	48%	31%	22%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 68.45	49/180

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

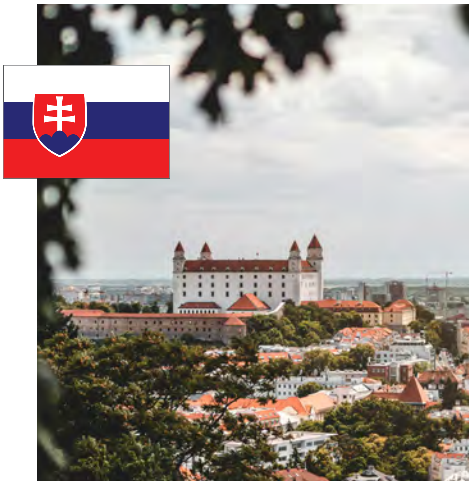
28% **SHARE NEWS** via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	46% (-9)	64%
2	YouTube	28% (-6)	56%
3	WhatsApp	23% (-1)	56%
4	TikTok	16% (-)	31%
5	Facebook Messenger	12% (-4)	34%
6	Instagram	11% (-2)	27%

Population	5.5m
Internet penetration	90%

SLOVAKIA



In a year of political crisis, September's premature elections saw the return of Robert Fico as Prime Minister, five years after being forced out by street protests following the murder of journalist Ján Kuciak. An attempted assassination of the Prime Minister in May 2024 was met by unqualified expressions of solidarity across the media and wider society.

The autumn parliamentary election took place in a climate of outright hostility towards the media by certain political parties, and the campaign provided further evidence that some politicians no longer see participation in set-piece television debates on the main terrestrial TV stations as essential. Robert Fico and other leading politicians from Smer and the Slovak National Party (SNP) believe they have more to lose than gain from critical questioning and direct confrontation with opponents, when they can get uncritical exposure in partisan, self-styled 'alternative' media and/or rely on their large social media followings (nearly 7 million interactions on Fico's Facebook profile in 2023).

Shortly before the elections a recording emerged purporting to show Michal Šimečka, leader of Progressive Slovakia, a party in second place in the opinion polls, and Monika Tódová, a journalist at Denník N, conspiring to influence the election.[83] Although the recording was quickly identified as a deepfake by both civil society and police fact-checkers, at whose behest most social networks blocked it, the hoax had already gained such traction on Telegram, Instagram, TikTok, Facebook, and YouTube that it was the most viral social media post of the whole campaign.

Shortly after taking office, Prime Minister Fico ordered a review of media accreditation policy for government headquarters. Four organisations whom Fico regards as 'unfriendly' – TV Markíza, Denník N, Sme, and Aktuality – saw their accreditation temporarily withdrawn and ministers continue to refuse to answer their questions.

The attempted assassination of the Prime Minister at a meeting in Handlová has highlighted concerns about political polarisation with a parliamentary resolution calling for a de-escalation of tensions and a cessation of hate speech. This, however, did not prevent renewed attacks on the media by representatives of the ruling parties in the immediate aftermath.

Following last year's licence fee abolition, Slovakia's PSB RTVS was guaranteed at least 0.17% of the state budget, but after the elections this was cut to 0.12%. This will increase the organisation's dependence on contracts with the state for specific 'public interest' programmes, allowing the government to directly influence programming.

The incoming government was known to be dissatisfied with RTVS and talked candidly about radical reforms. Initially it wanted to return to the pre-2010 structure of separate television and radio, which many saw as a ruse to allow the Director General to be replaced more easily. Andrej Danko, the leader of the SNP and deputy chair of parliament, said in an interview that he wants a 'state broadcaster' not a public service broadcaster.

The Minister of Culture (also a member of the SNP) proposed a new law in March 2024. It would alter RTVS's structure and oversight in ways contrary to key tenets of PSB such as editorial and financial independence, according to the European Broadcasting Union.[84] A seven-member Monitoring Board (four members elected by Parliament, three appointed by the Culture Minister) could remove the Director General more easily. Within days of publication, the majority of RTVS staff had signed a protest letter calling for the proposals to be withdrawn. The appeal cited repeated surveys showing RTVS to be the most highly trusted news source, and claimed the proposed changes effectively enable 'the political control of RTVS by any government'.

Markíza, the leading commercial TV station, owned since 2020 by Czech financial group PPF, has altered the style of its political coverage since the appointment of a new head of news, Michal Kratochvíl, in December 2023. In February 2024 the 'vast majority' of Markíza's reporters signed a protest letter alleging that Kratochvíl has tried to steer political coverage away from criticism of the government and favour its Presidential candidate. PPF has several large government contracts in transport and telecommunications and, like other stations, Markiza benefits from government advertising. In a barely veiled threat, Prime Minister Fico said he would ask ministers to consider spending their advertising budgets elsewhere.[85]

Penta – the Slovak financial group with a chequered history of political influence trading, currently perceived as close to the ruling party Smer – acquired *Nový Čas* and cas.sk in 2023. This means it owns both leading tabloids and their online versions (with *Plus Jeden Deň* and pluska.sk).

Transparency International Slovakia reported that 29% of Slovaks live in districts which it classifies as local news 'deserts'. The result is that criticism of local issues is often conducted via social media rather than in the local press and TV.

Andrea Chlebcová Hečková,
Constantine the Philosopher University, Nitra
Simon Smith,
Charles University, Prague

[83] https://edition.cnn.com/videos/business/2024/01/31/deepfake-ai-warnings-donie-osullivan-pkg-vpx.cnn?cid=ios_app
[84] https://www.ebu.ch/news/2024/03/slovak-government-proposals-threaten-media-independence
[85] https://standard.sk/492307/fico-markiza-dennik-n-sme-a-aktuality-su-nepriatelske-media-v-tomto-duchu-vydam-pokyny-na-urade-vlady

WEEKLY REACH OFFLINE AND ONLINE

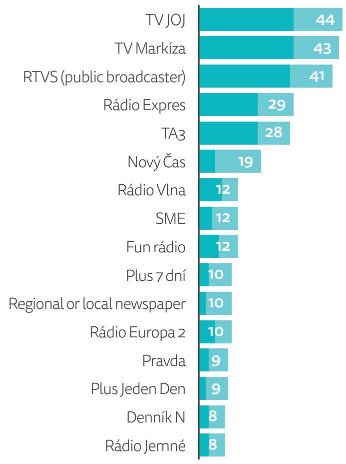
TOP BRANDS
% Weekly usage

- 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

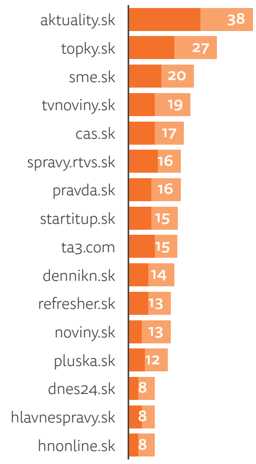
12% pay for **ONLINE NEWS**

PAY

TV, RADIO, AND PRINT



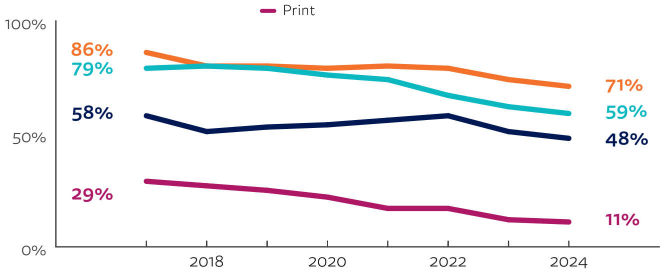
ONLINE



CHANGING MEDIA

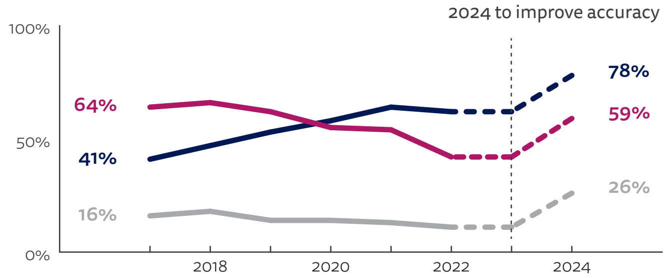
Although the largest declines are in TV and print, even online and social media are used as sources of news by 10–15% fewer respondents than in 2017.

SOURCES OF NEWS 2017–24



DEVICES FOR NEWS 2017–24

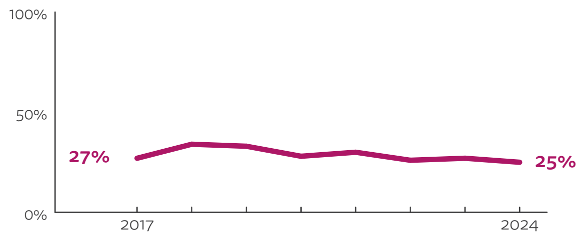
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Overall trust in the media (25%) fell to its lowest level yet in the eight years we have monitored Slovakia. The trend for many political leaders – especially within the government – to spurn the traditional media in favour of partisan sites where they get uncritical publicity is one factor that saps public trust in traditional brands.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

25% OVERALL TRUST =45/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Aktuality.sk	46%	27%	27%
Denník N	36%	26%	38%
Hospodárske noviny	48%	31%	21%
Nový Čas	27%	29%	45%
Plus 7 dni	31%	29%	40%
Pravda	42%	33%	25%
Rádio Expres	49%	31%	20%
Refresher.sk	31%	38%	31%
Regional or local newspaper	46%	35%	19%
RTVS (public broadcaster)	56%	23%	21%
SME	41%	27%	31%
TA3	56%	24%	20%
topky.sk	28%	31%	41%
TV JOJ	47%	24%	29%
TV Markiza	40%	24%	36%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF REPORTERS WITHOUT BORDERS | **WORLD PRESS FREEDOM INDEX SCORE 2024** | Score: **76.3** | **29**/180

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

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	49% (+1)	70%
2	YouTube	24% (-1)	59%
3	Facebook Messenger	16% (+1)	48%
4	Instagram	16% (+5)	35%
5	WhatsApp	10% (+1)	37%
6	TikTok	6% (+2)	17%

Population	47m
Internet penetration	93%

SPAIN

The Spanish media market is characterised by intense rivalries between major conglomerates, the continuing importance of broadcast news, and innovation online. Local and general elections in 2023 heightened political, media, and social polarisation, with news organisations covering the elections in a market defined by low media trust and decreasing interest in politics and information.

The Spanish media market has undergone significant changes, particularly at Mediaset, a leading broadcast TV corporation. The group closed Nius, its experimental digital-born news media company, which launched in 2019. Staff will be redeployed to the websites of Mediaset's two main channels Telecinco and Cuatro. Separately, news bulletins on Cuatro have restarted. Mediaset also hired Carlos Franganillo from public broadcaster RTVE in January 2024 as a primetime news anchor. Franganillo's appointment helped Telecinco's primetime news programme overtake TVE, positioning it as the second-most-watched news programme in Spain, behind Antena 3 *Noticias*.

In March 2024, turmoil erupted at public broadcaster RTVE where the decision by the interim president, Elena Sánchez, to dismiss the Head of Content prompted the board to remove her. The controversy arose over Sanchez's resistance to government pressure to acquire a late-night interview show hosted by David Broncano for €12m p.a. for two years, with a guaranteed primetime slot for 18 months. In the end the contract was approved thanks to the casting vote of the new interim president.

Overall, Spanish people are watching less traditional TV, with the growth of streaming contributing to that. But TV is holding up better than in many countries. Although the percentage of Spaniards subscribing to OTT services has increased from 37% to 65% in the past five years, linear TV remains dominant, with 84% of viewing compared to 16% for streaming services.[86]

According to InfoAdex, Spanish media companies experienced a modest increase in advertising revenue (4%) in 2023, with digital advertising accounting for 48% or €2.8bn of the €5.9bn total. Digital spending was primarily directed towards websites (38%), search engines (35%), and social media platforms (27%). The growth in branded content, up 21% to €550m reflects how engaging and narrative-driven content has become a preferred method for connecting with audiences.[87]

Traditional media formats, such as magazines, newspapers, and TV, had mixed fortunes: advertising revenues for magazines grew by 2.2% to €126m, but fell in newspapers by 2.1% to €340m, and remained flat in TV (-0.2%) at €1.7bn.

Spain's major news companies started digital subscription strategies around 2019, later than in some other European countries. However digital news subscriptions grew significantly last year, boosted by introductory offers and discounting. Company data indicate a total of 1.1 million digital subscribers. *El País* (350,000 subscriptions), *El Mundo* (123,000), and *La Vanguardia* (107,000) led this ranking. However, the lack of any independent audit of subscriber numbers means the figures should be viewed with caution.

In February 2023, *El Mundo*, the second largest Spanish newspaper, redesigned its digital and print editions. Prisa, meanwhile, announced plans for a major business news site bringing together journalists from *El País*'s economics section and the specialised daily *Cinco Días*. Prisa Audio is the second-largest audio streaming company in the world and the leader in the Spanish-speaking market. Major Spanish news outlets such as *El País*, Eldiario.es, El Español, *El Mundo*, and El Confidencial have taken significant steps towards leveraging social platforms for wider news dissemination by distributing content through WhatsApp since September.

Relevo, one of the newest digital sports media in the Spanish market, launched in 2022 and owned by Vocento, has pursued a very vigorous social media strategy with more than a million followers on social media and a strong focus on TikTok and Twitch alongside Twitter and Instagram. It quickly made waves with its in-depth coverage and investigative journalism, and its 2023 exposé of the sexual scandal involving Luis Rubiales, president of the Spanish Football Federation, became a huge story and eventually led to his resignation.

This year also saw significant legal developments in Spain's media landscape. The Association of Information Media, representing 83 Spanish news outlets, filed lawsuits against Meta alleging data protection violations and unfair competition. These cases highlight the need for tech giants to comply with European regulations.

Finally, artificial intelligence (AI) has played an increasingly pivotal role in the media landscape, with 94% of Spanish media executives believing that AI will enhance user experiences through content personalisation.[88] However, concerns about misinformation and the newsroom's capacity to adapt to AI-driven changes persist among the Spanish editors.

Alfonso Vara-Miguel, **Roncesvalles Labiano**, **María Fernanda Novoa** and **Aurken Sierra**
University of Navarra

[86] According to data from the CNMC Household Panel of the National Commission on Markets and Competition (CNMC). https://data.cnmc.es/
[87] Estudio Infoadex de la Inversión Publicitaria en España 2023. https://www.infoadex.es/wp-content/uploads/2024/01/Resumen-Estudio-InfoAdex-2023.pdf
[88] IBERIFIER, Iberian Digital Media Research and Fact-Checking Hub. https://iberifier.eu/2024/01/10/iberifier-reports-analysis-of-trends-and-innovations-in-the-media-ecosystem-in-spain-and-portugal-2025-2030/

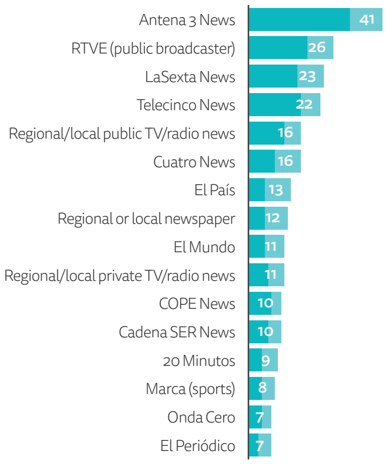
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

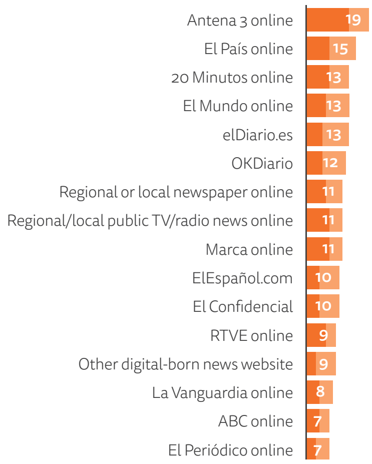
% Weekly usage

- 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

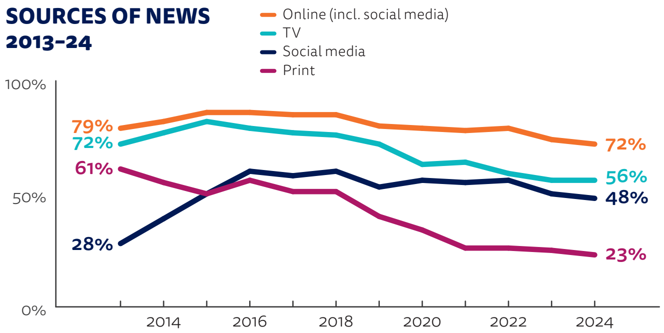


12% pay for **ONLINE NEWS**

CHANGING MEDIA

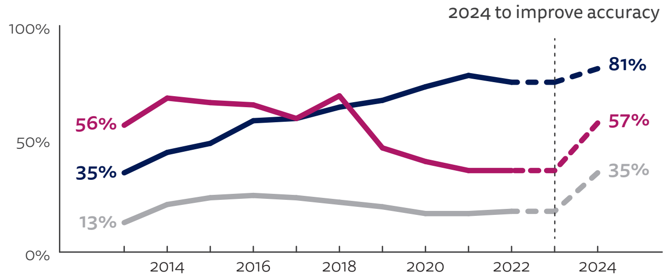
Traditional sources of news such as TV and print have declined significantly since the COVID-19 pandemic, but digital consumption is also down, perhaps a reflection of increasing news avoidance overall.

SOURCES OF NEWS 2013–24



DEVICES FOR NEWS 2013–24*

No data for 2023; question reformulated in 2024 to improve accuracy

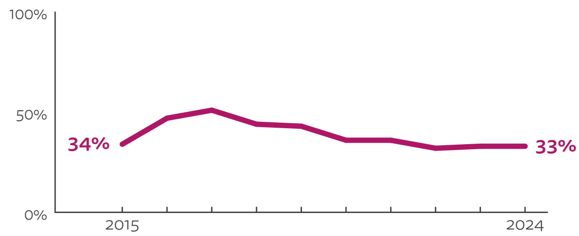


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

In a year with two elections, trust in news overall remained unchanged, and worryingly, those who distrusted the news in general (39%) still exceeded the group that usually trusted it (33%). There was though a 6pp increase in trust in the Spanish public broadcaster, RTVE, driven particularly by the young (25–34-year-olds) and voters on the left.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

33% OVERALL TRUST =33/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
20 Minutos	42%	35%	23%
ABC	43%	28%	29%
Antena 3	52%	24%	24%
Cadena SER	50%	26%	24%
COPE	46%	24%	30%
El Mundo	47%	28%	25%
El País	48%	27%	25%
ElConfidencial.com	37%	37%	26%
elDiario.es	40%	34%	25%
La Vanguardia	44%	33%	23%
LaSexta	45%	24%	31%
OKdiario.com	31%	32%	36%
Regional or local newspaper	54%	30%	16%
RTVE (public broadcaster)	53%	22%	24%
Telecinco	34%	27%	39%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 76.1	30/180

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	WhatsApp	27%	(-)	75%
2	Facebook	26%	(-4)	52%
3	YouTube	22%	(+1)	58%
4	Instagram	21%	(-)	52%
5	X (formerly Twitter)	16%	(-2)	25%
6	TikTok	11%	(+1)	29%

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

Population	10m
Internet penetration	97%

SWEDEN

Sweden is an example of a country with strong but separate public service radio and TV media organisations and a commercial media sector that has successfully persuaded people to pay for online news. Despite concentrated media ownership, government policies are focused on supporting plurality at national and local level, in part through press subsidies. Sweden is also one of the pioneers of using AI in the newsroom.

Sweden has a relatively strong news media landscape by international standards with even commercial news publishers getting some support from public subsidies. Until about a decade ago Swedish news publishers relied mostly on advertising revenues, while direct reader revenues were less significant. However, while the online advertising market continues to prosper, around two-thirds of all revenues go to Alphabet and Meta, leaving less for publishers. As commercial publishers' advertising revenues have declined, they've been cutting costs and looking for new sources of income, primarily from readers. The largest news publishers have built income from print subscriptions, which have accounted for approximately three-quarters of their overall reader revenues. In 2023 the Swedish newspaper industry managed to sustain overall reader revenues (6250.9m SEK, €545m), at a similar level to the previous year, with the share coming from online news increasing from 24% in 2022 to 28% in 2023.[89] Over the past decade news publishers have reduced the frequency of print publication and distribution in rural areas as costs per print copy increase with reduced subscriber numbers.

Sweden, along with Norway, has consistently been at the top of our countries in terms of people paying for news, with our 2024 survey reporting 31% in 2024 compared to 33% in 2023. However, online news subscribers tend to be less loyal than for print, often taking up special offers for a relatively short period of time. Swedish news publishers are on a path from all free content, to some free, to working with paywalls, and are now increasing their prices.[90]

Four Swedish news publishers with national coverage have been successful in charging for news. Two are owned by the Norwegian Schibsted group (*Aftonbladet* and *Svenska Dagbladet*), and the other two by Sweden's Bonnier group (*Expressen* and *Dagens Nyheter*). The Bonnier Group were recognised for developing the best reader revenue business with their Bonnier News+ solution, offering its subscribers access to online content from more than 150 newspapers and magazines.[91]

The evening tabloids *Aftonbladet* (48%) and *Expressen* (32%) have the highest reach online (alongside SVT with 36%). Swedish news publishers tend to offer some news for free (such as newswire) and then paywall premium content or services, with news alongside services for weight-management, etc.

Swedish news publishers are known for being digital forerunners. Recently, organisations such as *Aftonbladet* (Schibsted) and *Expressen* (Bonnier) have expanded into audio formats such as podcasts as well as TV. *Aftonbladet* has invested in news personalisation, whereas *Svenska Dagbladet* (Schibsted) has adopted a 'podcast-first' approach. As elsewhere, Swedish news publishers have started investing in and incorporating AI, to improve efficiency. For example, *Aftonbladet* has created an AI hub with a cross-functional team, while PSM Swedish Radio (SR) use AI in many ways, including synthetic voices and transcribing audio, but block platforms from training their AI on their content. This is in line with both PSM and commercial news publishers continuously innovating, but having become more cautious when it comes to third-party platform companies, seeking to reduce their dependence on them.

Facebook, YouTube, and Instagram are the top three social media platforms in Sweden, in general and for news. But while two-thirds report using Facebook, only one-quarter use it for news. Facebook has repeatedly deprioritised news in their algorithms, and the platform has lost some of its value for publishers.

PSM are repeatedly criticised by other publishers for their innovative activities, by the far right for not offering credible news, and also criticised for not reaching the entire public. PSM in Sweden are required to own and control their own distribution infrastructure, and thus cannot rely unduly on external platforms to increase reach. SVT social media guidelines reflect this approach: key features include safeguarding their independence and that their social media activities facilitate access in a positive way, with user data managed properly, and the brand protected by clear separation from advertising.

Oscar Westlund
Oslo Metropolitan University and University of Gothenburg

[89] TU Mediefakta, Läsarintäkterna bibehölls tack vare fortsatt digital tillväxt.
[90] Thomas Baekdal, Gratis, lite gratis, betalvägg och höjda priser.
[91] Tidningsutgivarna, Vinnarna I Årets Dagstidning 2024 har korats, 20 Mar. 2024.

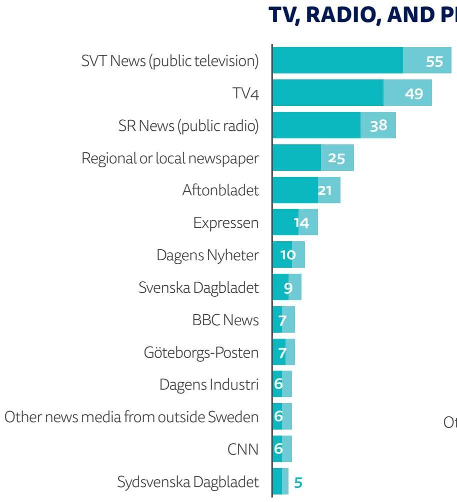
WEEKLY REACH OFFLINE AND ONLINE

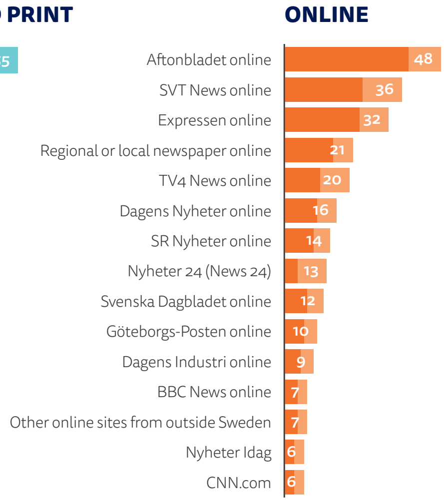
TOP BRANDS

% 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

31% pay for **ONLINE NEWS**

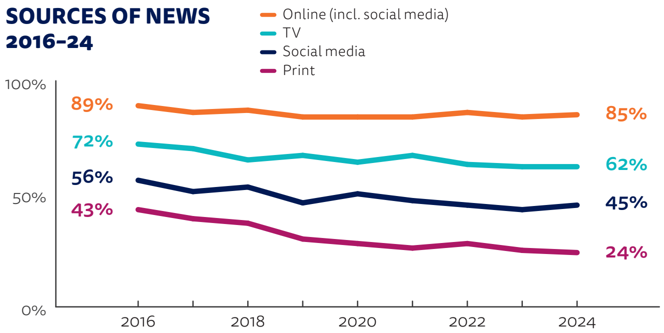




CHANGING MEDIA

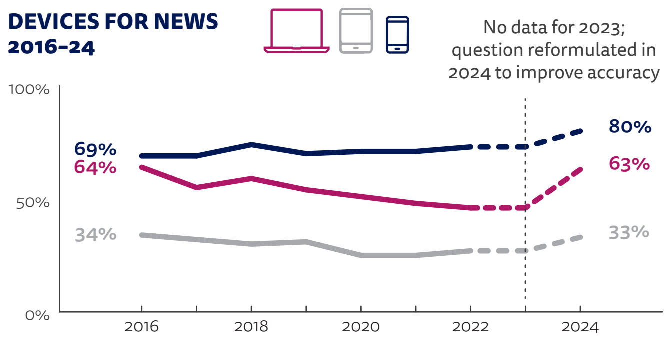
Swedes predominantly access the news online, with reach for both television and print declining over time. Use of social media for accessing news has decreased in recent years.

SOURCES OF NEWS 2016–24



DEVICES FOR NEWS 2016–24

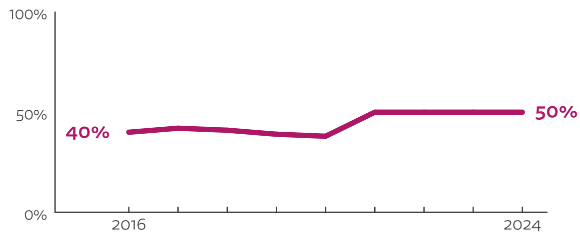
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in news overall has remained unchanged at 50%, since the very significant boost it had after the start of the COVID-19 pandemic. Amongst the brands surveyed, Swedes express most trust in the two public service media (PSM) organisations and local newspapers, and the least trust in alternative news media.

OVERALL TRUST SCORE 2016–24



Proportion that trusts 'most news most of the time'

50% **OVERALL TRUST =11/47 markets**

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 88.32	3/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Aftonbladet	52%	18%	30%
Dagens Industri	70%	19%	10%
Dagens Nyheter	68%	17%	16%
Expressen	53%	21%	26%
Fria Tider	25%	20%	55%
Göteborgs-Posten	63%	25%	13%
Nya Tider	24%	24%	52%
Nyheter 24	41%	27%	32%
Nyheter Idag	40%	30%	30%
Regional or local newspaper	73%	17%	10%
Samhällsnytt	36%	27%	38%
Svenska Dagbladet	68%	19%	13%
Sveriges Radio (SR) News	77%	10%	13%
Sveriges Television (SVT) News	77%	9%	13%
TV4 News	63%	20%	17%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

43% listened to **PODCASTS** in the last month

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	25%	(+1)	66%
2	YouTube	17%	(+2)	57%
3	Instagram	15%	(+3)	56%
4	X (formerly Twitter)	9%	(+1)	15%
5	Facebook Messenger	8%	(-1)	49%
6	TikTok	5%	(+1)	14%

Population	8.8m
Internet penetration	94%

SWITZERLAND

In a country with four official languages, only a few larger media companies operate in more than one of Switzerland's relatively small markets. The public broadcaster still has the most trusted news brands but could see substantial budget cuts. With audiences' interest in news declining and willingness to pay for news stagnating, commercial media companies have announced more layoffs.

People's interest in news has been declining, and the group of people with limited news repertoires, the so-called 'news deprived', has been on the rise, now making up roughly 40% of the adult population.[92] Faced with stagnating levels of paying for online news (17% in 2024), commercial media companies juggle between saving costs and looking for revenue sources old and new. On the cost side, the bigger players, TX Group, CH Media, and Ringier, announced substantial layoffs in late 2023, affecting both advertising-based brands such as *20 Minuten* and blick.ch, as well as regional subscription-based brands such as *Aargauer Zeitung*. TX Group and CH Media continue to centralise news production across their brands, streamlining international and national news. On the revenue side, blick.ch has implemented a (freemium) paywall, reporting that more than 10,000 subscribers are paying around 10 CHF (around $10 US) per month.

Publishers are pushing for a new law to make technology platforms pay copyright fees for link previews and news snippets, in line with other European countries. A draft law is likely to come before Parliament in 2024 and may well succeed.

In a process of consolidation, the biggest private media companies from Switzerland's larger German-speaking region now own many news brands in the smaller markets, thus getting access to a larger nationwide advertising market. These include, for instance, TX Group with French-language *20 minutes* or *24heures* and Ringier and CH Media with recent spin-offs of blick.ch and watson.ch in French. By contrast, NZZ group, the publisher of the renowned Zurich based *NZZ* newspaper, is focused on pursuing opportunities in the much larger neighbouring German market.

Finally, the public broadcaster SRG SSR, whose SRF and RTS brands continue to be the most used and most trusted brands, must provide programmes in all regions, and uses some of the licence fee revenues from the larger German-language market to subsidise the smaller language regions. The licence fee is contested and could be halved, after right-wing politicians from German-speaking Switzerland successfully launched a referendum, which might take place in 2026. At the moment, the federal government is testing the waters by inviting feedback on its counter-proposal to the referendum, which would result in a more limited reduction in the licence fee. Taking into account the licence fee reduction, together with shrinking advertising revenues and increasing inflation, SRG SSR fears that even the more moderate plan would effectively lead to a budget cut of roughly 15%.

This political debate might exacerbate existing tensions within the sector, with several private media companies claiming that the public broadcaster constitutes a threat in the television and the online markets. However, there are also some joint cooperation initiatives. SRG SSR is participating in 'OneLog', a joint industry project to provide users with a single login for online news content. The four largest private media companies are also currently working to extend 'OneLog' with 'OneID', a technology to better identify users across websites after the expected end of Google's third-party cookies in 2024.

Digital journalism remains challenging and, perhaps unsurprisingly, Switzerland's online sector is dominated by traditional players from print and broadcasting; only 20% of the 300+ online news media are online pure players. In order to reach fragmented audiences, more than six in ten online news media are active not only on Facebook and X but also on Instagram, and slightly less so on YouTube. TikTok has been adopted so far only by larger media brands.[93]

Artificial intelligence has become the talk of the day in the media industry. Anticipating a substantial transformation through generative AI, industry-wide guidelines have been formulated, and all big media companies have appointed heads of AI, created specialised AI departments, or launched processes to implement AI throughout the journalistic value chain. Audiences are sceptical towards AI-generated news. In a survey, people also indicated that they would not want to pay for AI-generated news, believing that the use of AI allows media companies to reduce costs.[94] It seems that AI in journalism has not only highlighted the issue of trust but will also have economic ramifications.

Linards Udris and **Mark Eisenegger**
Research Center for the Public Sphere & Society (fög), Department of Communication and Media Research (IKMZ)/University of Zurich

92 Fög – University of Zurich, Yearbook Quality of the Media, 2023. Schwabe. https://www.foeg.uzh.ch/dam/jcr:40dd3a23-50d0-4505-9173-464d78f78788/JB_2023_I_Main_findings_final.pdf
93 L. Udris, Q. Ryffel, D. Vogler, Bericht: Pilotstudie Struktur der Onlinemedienangebote. Zürich: Forschungszentrum Öffentlichkeit und Gesellschaft/UZH, 2023. https://doi.org/10.5167/uzh-253197
94 M. Eisenegger, D. Vogler, L. Udris, S.Fürst, 'How a Swiss audience poll revealed strong reservations about AI in news production'. 2023. https://en.ejo.ch/digital-news/how-a-swiss-audience-poll-revealed-strong-reservations-about-ai-in-news-production

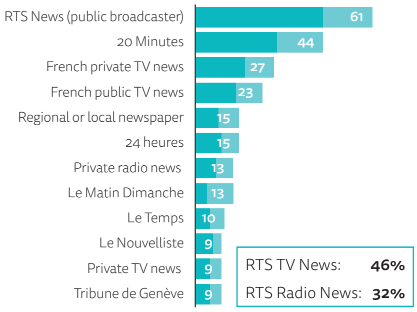
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

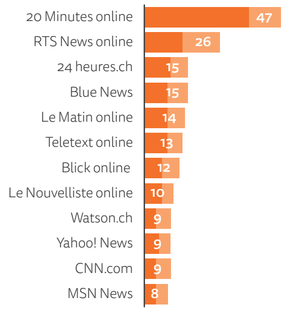
% Weekly usage

- 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

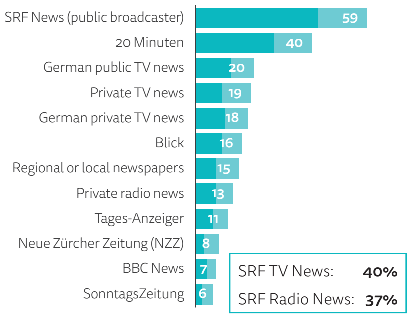
TV, RADIO, AND PRINT (FRENCH SPEAKING)



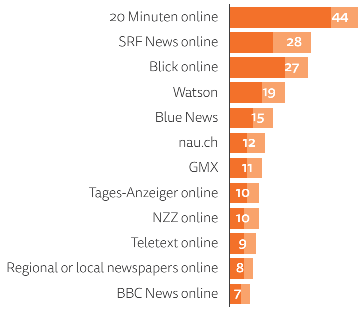
ONLINE (FRENCH SPEAKING)



TV, RADIO, AND PRINT (GERMAN SPEAKING)



ONLINE (GERMAN SPEAKING)



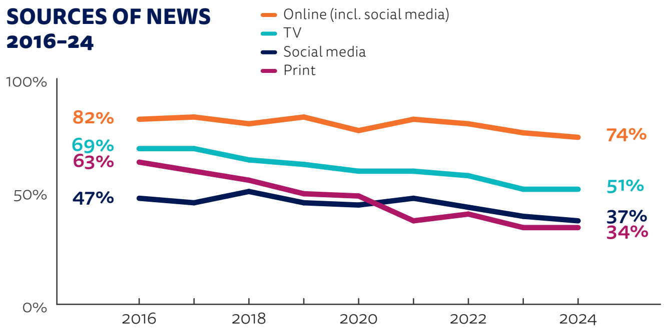
17% pay for **ONLINE NEWS**

French 18% | German 16%

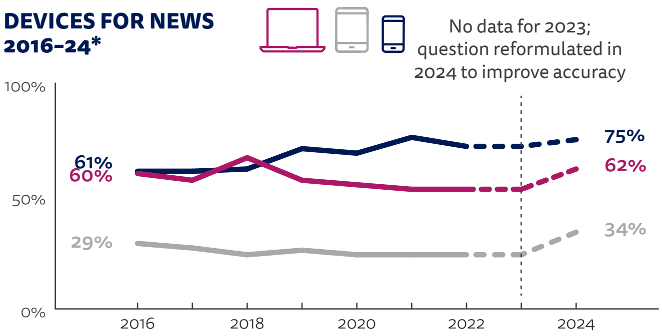
35% listened to **PODCASTS** in the last month

French 34% | German 36%

SOURCES OF NEWS 2016–24

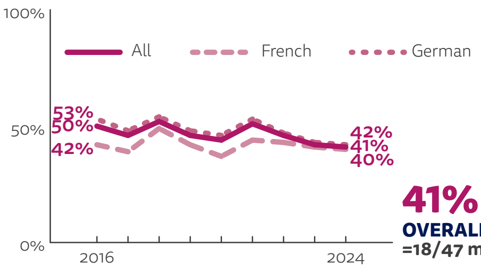


DEVICES FOR NEWS 2016–24*



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

TRUST IN NEWS 2016–24



41% **OVERALL TRUST** =18/47 markets

Overall trust levels have declined slightly for the last three years, particularly in German-speaking Switzerland. Brands from the public broadcaster remain the most trusted in both German-speaking and French-speaking Switzerland, followed by subscription-based newspaper brands. Less trust tends to be placed in tabloids and digital-born brands.

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	WhatsApp	25%	(-1)	69%
2	YouTube	23%	(-1)	55%
3	Facebook	20%	(-2)	46%
4	Instagram	17%	(+2)	40%
5	TikTok	7%	(+1)	17%

PUBLIC OPINION ON BRAND TRUST

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

FRENCH

Brand	Trust	Neither	Don't Trust
20 minutes	55%	22%	23%
24 heures	63%	26%	11%
Arcinfo	53%	33%	15%
Blick	47%	31%	22%
Blue News	48%	34%	18%
Le Matin	59%	24%	17%
Le Nouvelliste	59%	29%	12%
Le Temps	65%	25%	10%
MSN	33%	37%	30%
Private radio news	56%	31%	13%
Private TV news	58%	28%	14%
Regional or local newspaper	63%	27%	11%
RTS News	73%	18%	9%
Tribune de Genève	58%	30%	11%
Yahoo! News	32%	36%	32%

GERMAN

Brand	Trust	Neither	Don't Trust
20 Minuten	51%	24%	25%
Aargauer Zeitung	55%	32%	14%
Blick	39%	21%	41%
Blue News	47%	30%	22%
gmx	33%	38%	29%
MSN News	36%	36%	28%
nau.ch	43%	31%	26%
NZZ	66%	20%	14%
Private radio news	57%	27%	17%
Private TV news (e.g. Tele Züri)	61%	23%	16%
Regional or local newspaper	67%	20%	13%
SonntagsZeitung	60%	24%	16%
SRF News	72%	16%	12%
Tages Anzeiger	64%	21%	15%
Watson	47%	29%	24%

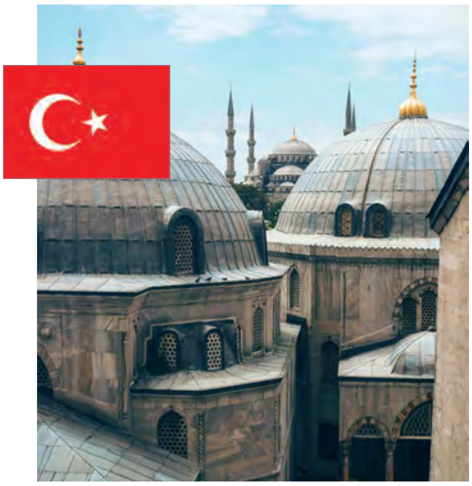
Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

WORLD PRESS FREEDOM INDEX SCORE 2024 | Score: **84.1** | **9**/180

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

Population	86m
Internet penetration	85%

TURKEY



After winning a narrow victory in last year's presidential elections, Recep Tayyip Erdoğan began his new term with renewed vigour and continued tight control over the media. But with the country still split, the president suffered a setback in March 2024 local elections, the biggest defeat for the ruling party since 2002.

The general election campaign in 2023 took place in an atmosphere of intense sorrow and heightened grievances about the devastating February earthquakes. Described as 'competitive, but still limited' by the Organisation for Security and Co-operation in Europe's election observation team, the 2023 elections were characterised by campaign coverage in the mainstream media that mostly favoured the ruling parties and candidates.[95] Government-friendly brands such as CNN Türk, which is owned by Demirören Media and A Haber, owned by the Turkuvaz Media Group, as well as the public broadcaster, TRT, allocated disproportionately greater airtime to the incumbents despite impartiality being required by the Turkish constitution.

Meanwhile the High Council for Broadcasting (RTÜK), whose legal obligations include securing freedom of expression and media pluralism, handed out heavy fines to a number of TV channels that included critical voices. NOW TV (formerly FOX) was amongst those fined for a live election broadcast in which a journalist said that 'democracy does not solely consist of the ballot box'. HalkTV was fined 5% of its monthly ad revenue for carrying comments questioning the legitimacy of the election outcome from a 'political standpoint' as opposed to a legal one. Another station was fined 3% of its monthly ad revenue for discussing allegations of ballot irregularities.[96]

To the widespread surprise of many, however, local elections in March 2024 marked the largest electoral defeat for President Erdoğan and his ruling party since 2002. Winning not only Turkey's largest cities including Istanbul, the capital Ankara, and Izmir, but also some of the rural districts that were long considered as government strongholds, the main opposition party, Republican People's Party, also secured the most votes nationwide. Many analysts agree that these results, almost a year after Erdoğan's presidential victory, reflect widespread frustration with the skyrocketing inflation rates, near 70% in April 2024.

Turkey also celebrated the Republic's 100th anniversary in 2023, which coincided with a major controversy involving the Disney Plus (Disney+) platform, resulting in a wave of subscriber boycotts. Originally set to be released on 29 October, Republic Day, it was announced that the six-episode series on the country's founding father, Mustafa Kemal Ataturk, would be pulled from the platform. Amidst allegations that Disney's decision was linked to lobbying by the Armenian diaspora, the RTÜK started an investigation into the platform for disrespecting 'the most important social value' of the Republic.[97]

In December 2023, RTÜK was back in the headlines when it issued a fine and a two-episode ban on NOW TV's drama series *Kızıl Goncalar* (Crimson Buds) for its critical depiction of pious characters in the show in a way that violates the society's national and spiritual values and general morality.

The longstanding media censorship climate in Turkey also impacts freedom of discussion and debate in social media and video networks. Over the last decade, a number of famous journalists have gained popularity by carving out a niche on platforms such as YouTube, with less oversight or interference from the government. But now a number of legal amendments, such as the Disinformation Bill, pose greater uncertainty and risk to journalists, activists, and ordinary citizens alike. This year's Digital News Report data show that 44% report sharing news online, with previous data indicating that the majority feel they have to be careful when talking about politics with others online.

In January 2024, the state-run Press Bulletin Authority (BİK) accepted a regulation that includes online news sites among the media where official announcements and advertisements will be published. The Turkish Journalists Association have opposed this in part because of concerns that the official announcement requirement being removed when a website is blocked would constitute a serious risk to the freedom of the press and expression in a country where blocking decisions are frequently issued.[98]

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

95 https://www.osce.org/odihr/elections/turkiye/543552
96 https://ipi.media/turkey-broadcast-regulator-fines-several-news-channels-over-critical-coverage-of-elections/
97 https://www.washingtonpost.com/world/2023/08/02/turkey-disney-ataturk-series-cancelled/
98 https://medyascope.tv/2023/01/13/internet-haber-sitelerine-iliskin-resmi-ilan-ve-reklam-yonetmeligi-bik-genel-kurulunda-kabul-edildi-gazeteciler-cemiyeti-anayasaya-ve-calisma-hurriyetine-aykiri/

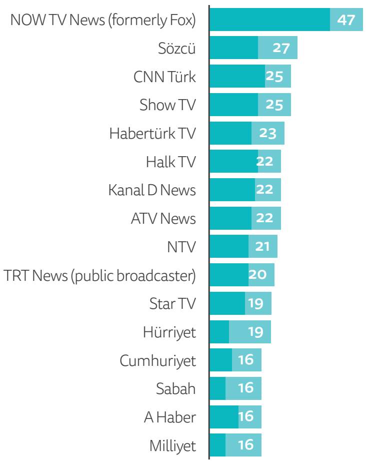
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

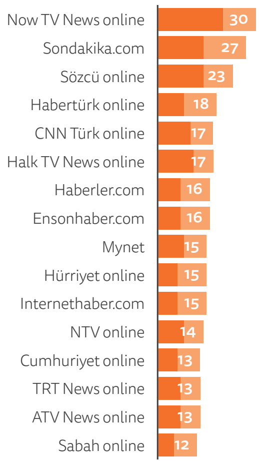
% Weekly usage

- 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



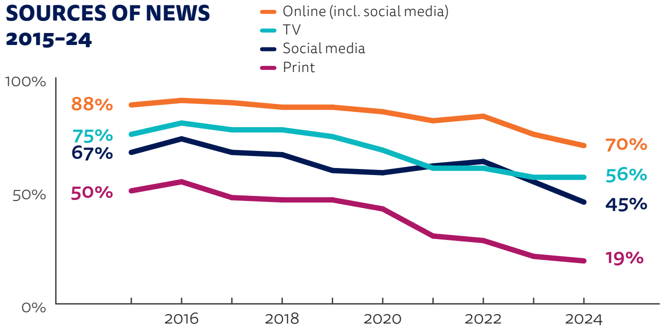
ONLINE



CHANGING MEDIA

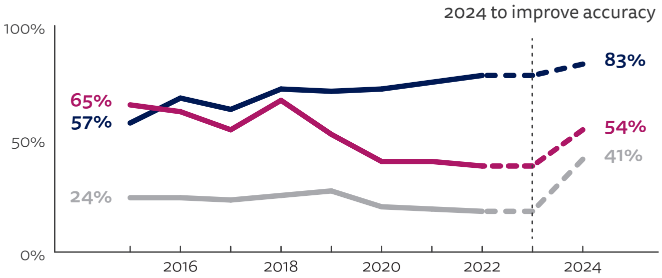
Television remains the most influential news medium in Turkey along with online news services of the leading national publishers. Printed newspapers, by contrast, are in sharp decline, with weekly reach less than half what it was in 2015.

SOURCES OF NEWS 2015–24



DEVICES FOR NEWS 2015–24*

No data for 2023; question reformulated in 2024 to improve accuracy

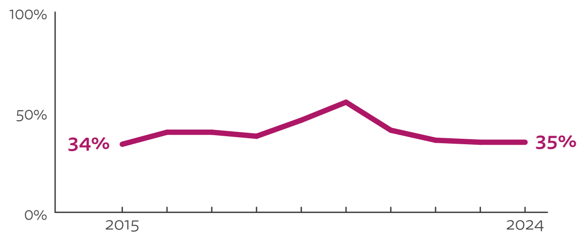


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Trust in news in general has remained stable at 35%. While most brands that still carry critical voices of the government have seen a slight increase in their trust scores this year, the public broadcaster (TRT), which has been criticised for its election coverage in favour of the incumbent, dropped 3pp.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

35%
OVERALL TRUST
=26/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
A Haber	35%	17%	48%
ATV	36%	19%	45%
CNN Türk	50%	21%	29%
Cumhuriyet	54%	22%	25%
Habertürk	51%	23%	26%
Halk TV	52%	19%	29%
Hürriyet	42%	24%	34%
Kanal D News	42%	26%	32%
Milliyet	44%	24%	33%
NOW TV News (formerly Fox)	60%	16%	25%
NTV News	52%	22%	26%
Sabah	39%	21%	40%
Show TV News	43%	26%	31%
Sözcü	53%	20%	27%
TRT News	45%	18%	37%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 31.6	158/180

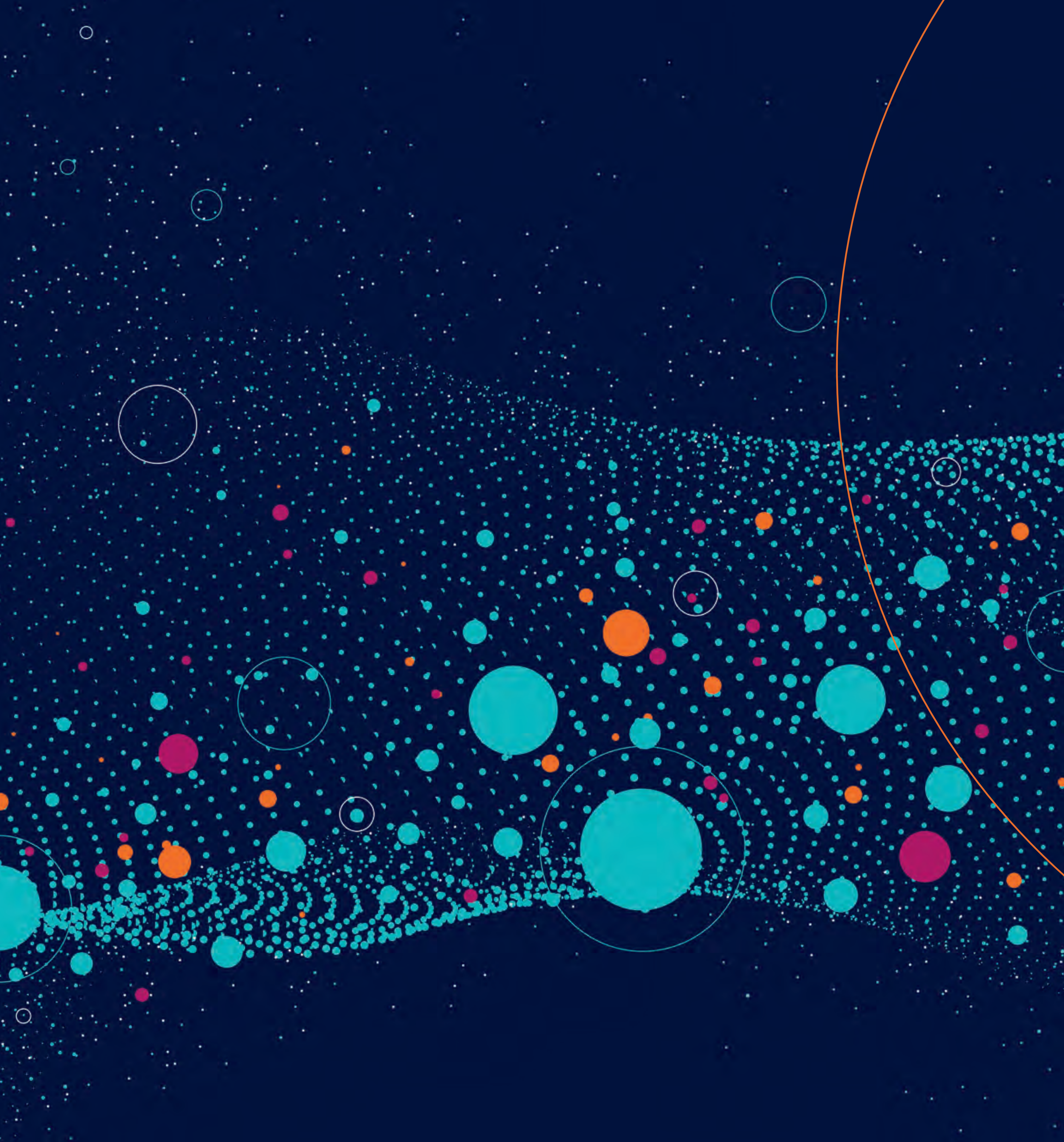
Measure of press freedom from NGO Reporters Without Borders based on expert assessment. More at rsf.org

44%
SHARE NEWS
via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	YouTube	38% (-7)	60%
2	Instagram	38% (2)	59%
3	WhatsApp	29% (+1)	62%
4	Facebook	27% (-6)	45%
5	X (formerly Twitter)	22% (-4)	29%
6	TikTok	10% (-)	20%

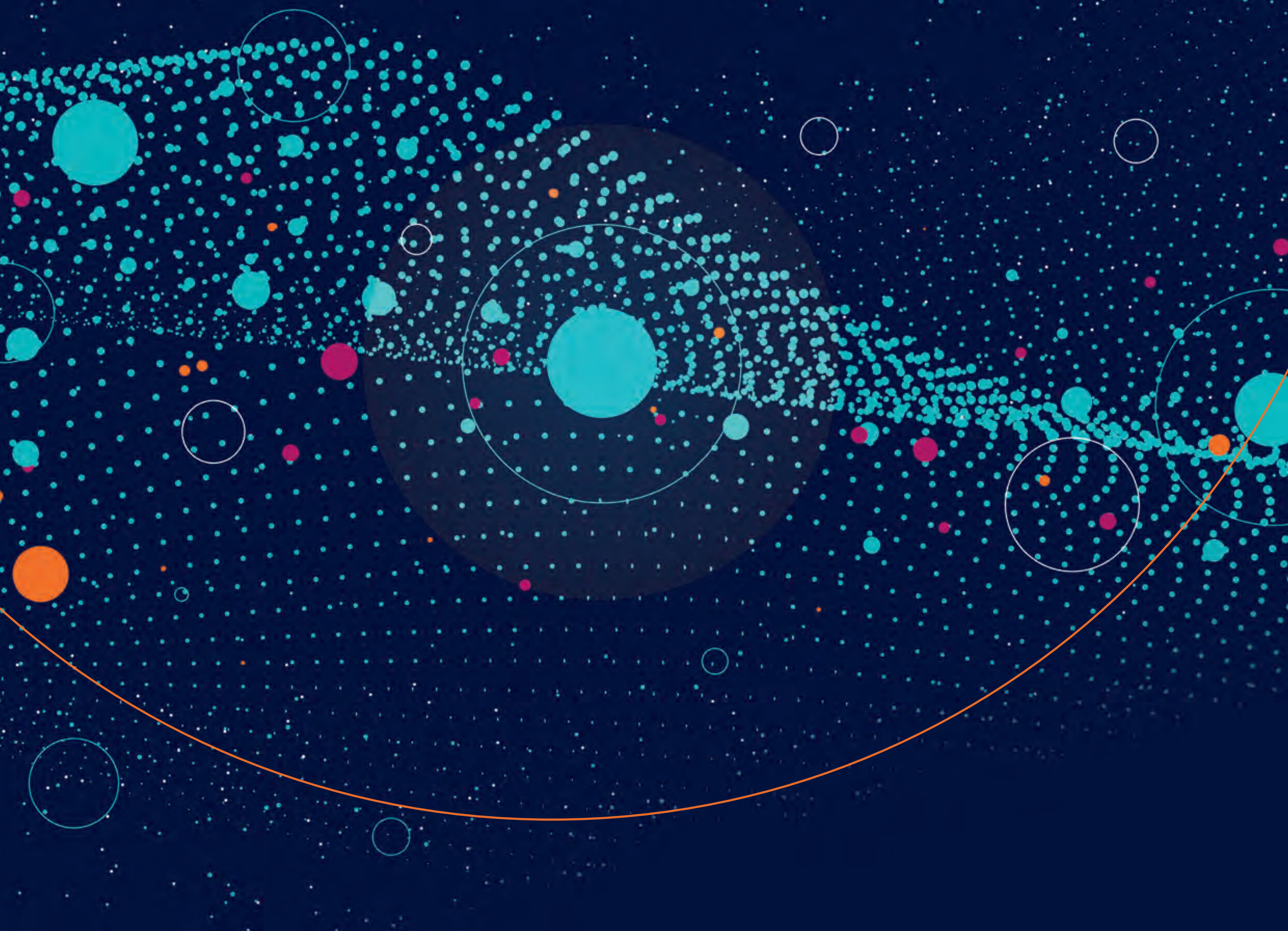
SECTION 3



SECTION 3

Analysis by Country and Market

Americas



Population	331m
Internet penetration	90%

UNITED STATES

A year of sweeping job losses that some compare to the 2008 financial crisis has left US newsrooms hoping that heightened attention in a presidential election year will staunch the industry-wide bleeding. Meanwhile, publishers have been wrestling with how generative AI could help drive greater efficiency in the newsroom without damaging trust. New roles are being created to manage this process.

The US news industry shed jobs at a precipitous rate over the last year, with total losses of nearly 2,700 positions in 2023 – the grimmest year since the pandemic – followed by a wave of high-profile layoffs in early 2024. The cuts have hit iconic brands across the industry, from broadcast giants NBC News and ABC News, to *Time Magazine* and *National Geographic*, to major NPR affiliates like New England Public Radio, New York Public Radio, and Southern California Public Radio.

Newspapers continue to be hit the hardest. The *Los Angeles Times* laid off 115 journalists to begin 2024, more than one-fifth of its newsroom. That followed a year in which the *Washington Post* cut more than 250 positions through a combination of layoffs and buyouts. Many regional papers, like the *Dallas Morning News* and the *San Diego Union Tribune*, saw major newsroom cuts in 2023.

Among digital-first venues, the non-profit Texas Tribune announced its first-ever layoffs in August, losing 10% of its newsroom. Vox Media and Vice Media both saw two waves of staff cuts in 2023; the latter then laid off 'hundreds' more in February 2024 and announced it would shutter its news site, vice.com. Business Insider, owned by Axel Springer, likewise announced an 8% staff cut to begin the new year. The revered music journalism site Pitchfork, launched in 1996, was restructured by parent Condé Nast and folded into GQ magazine.

Meanwhile, a report from the Medill School of Journalism at Northwestern University found 2.5 local newspapers closed every week in 2023; that leaves more than half of all counties in the US with 'limited access to reliable news and information', the authors found. According to the report, by the end of 2024, the US will have lost a third of its newspapers since 2005.[99]

To help mitigate these trends, a coalition of 22 national funders and donors launched Press Forward in 2023. The national initiative will invest more than $500m over five years to strengthen local newsrooms, address inequalities facing underserved communities and news-desert areas, and support policies focused on access to news and information, among other goals. Public officials at the state and national levels have also introduced bills focused on supporting and sustaining local news outlets and journalists.

Generative AI is becoming an important tool for newsrooms. Some news organisations drew negative attention for their AI use, including *Sports Illustrated*, which published AI-generated articles accompanied with bylines and headshots of fake writers, according to reporting by Futurism. Earlier, the website CNET published more than 70 articles written using AI tools, some of which contained mistakes and were inadequately labelled.[100]

The *New York Times* has begun building a team to explore strategies for using AI in the newsroom, hiring Quartz co-founder Zach Seward as the editorial director of AI initiatives. A social media post from Seward referenced plans to hire a machine-learning engineer, a software engineer, a designer, and editors for the initiative. The *Times* also drew attention for its lawsuit against OpenAI and Microsoft for copyright infringement. The suit alleges that the companies' chatbots were trained with millions of articles published by the *Times* – and now represent sources of competition.[101]

The challenges facing X (formerly Twitter) continue to mount, with a study from Edison Research finding that the platform experienced a 30% usage drop from 2023–24. More than a year after taking over as CEO, Elon Musk has eliminated the platform's blue-check verification system and outsourced content moderators, and many staff members have been fired, laid off, or have exited, including the head of Trust and Safety. In July, Musk tweeted that the company had seen a 50% drop in advertising revenue. In July, Facebook launched Threads, a text-based version of Instagram that drew 10 million users in its first seven hours and surpassed 100 million within days but has struggled to maintain that early momentum.

Cable news outlets have seen major shakeups over the past year, including the September retirement of Rupert Murdoch from the Fox and News Corp boards and the appointment of his son Lachlan to run the global media empire. New CNN chief executive Mark Thompson announced in early 2024 that the network would overhaul its morning programming, including transitioning flagship show *CNN This Morning* from a chat-show format to straight news coverage, amid viewership declines.

Joy Jenkins
University of Missouri
Lucas Graves
University of Wisconsin-Madison

[99] https://localnewsinitiative.northwestern.edu/projects/state-of-local-news/2023/
[100] https://futurism.com/cnet-ai-articles-label
[101] https://www.theguardian.com/media/2023/dec/27/new-york-times-openai-microsoft-lawsuit

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

22% pay for **ONLINE NEWS**

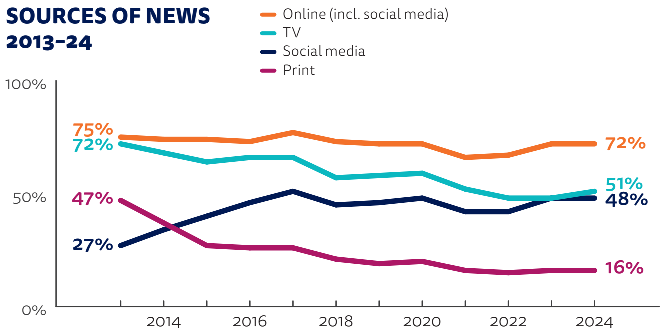
TV, RADIO, AND PRINT

ONLINE

CHANGING MEDIA

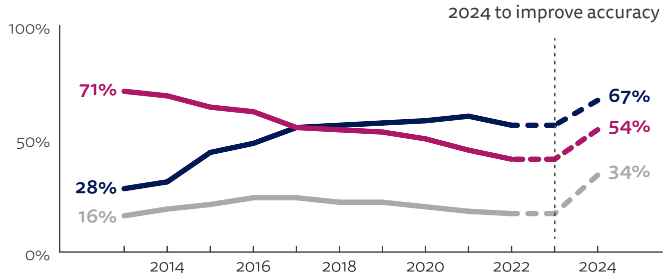
Online news continues as the top source for Americans, with access via social media a big part of that. Television news has seen an uptick this year (+3pp) and will potentially increase further as presidential election coverage ramps up.

SOURCES OF NEWS 2013–24



DEVICES FOR NEWS 2013–24

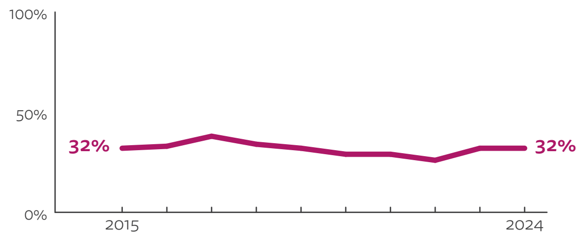
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in news (32%) has remained stable in the US since 2023, though it remains at the bottom half of surveyed countries. Among the brands included in our survey, local TV news and local newspapers remain most trusted (62% and 61% respectively) with trust levels for other brands affected by the highly polarised US market. Cable news channels Fox News and CNN continue to have some of the highest levels of *distrust*.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

32% OVERALL TRUST =35/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 66.59	55/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
ABC News	52%	20%	28%
BBC News	52%	25%	23%
CBS News	52%	20%	28%
CNN	48%	15%	37%
Fox News	43%	15%	43%
HuffPost	39%	28%	32%
Local television news	62%	21%	17%
NBC/MSNBC News	49%	18%	32%
New York Times	50%	20%	30%
NPR News	47%	23%	29%
Regional or local newspaper	58%	24%	18%
USA Today	47%	27%	27%
Wall Street Journal	49%	26%	25%
Washington Post	46%	23%	31%
Yahoo! News	40%	29%	30%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	31%	(+2)	61%
2	YouTube	29%	(+5)	60%
3	X (formerly Twitter)	15%	(+1)	25%
4	Instagram	14%	(+2)	36%
5	TikTok	9%	(+3)	23%
6	Facebook Messenger	9%	(+2)	38%

Population	46m
Internet penetration	91%

ARGENTINA

The Argentine information environment is in turmoil, with the newly elected president pledging to privatise or close the already weak public media and to eliminate all government advertising. Faced with rampant inflation, this has piled further pressure on privately owned news outlets. Yet interest and trust in news remains low.

The impact of libertarian President Javier Milei's hostility to the media is being felt throughout Argentina's news industry, something which is underscored by extensive downsizing in both public and private outfits. In early 2024, more than 700 news workers were laid off when the government shut down the state-owned news agency Télam, 600 were laid off from public broadcaster Radio Nacional, and 250 from América TV, one of the four most important private television stations.

Milei emerged first as an outsider candidate, becoming president in 2023. Following a playbook established by Trump in the US and Bolsonaro in Brazil, he became notorious for challenging critical journalists, an approach which has continued into office. Reporters without Borders (RSF) said his 'readiness to designate a sector of the media as enemies of his government … is an alarm signal for journalism in Argentina'.

The president is a heavy user of social media, sometimes reposting on X hundreds of times a day. 'I use social media at breakfast, lunch and at night,' he told an interviewer. As for his fellow Argentinians, in our survey, 37% of respondents said they got news on Facebook, compared to 46% in 2023. News consumption remained stable on Instagram and WhatsApp, where a third of respondents report getting information, but has increased significantly on YouTube (+4pp) and TikTok (+4pp).

The decline in interest in news was not reversed by the heated presidential election, in which opposing campaigns used images generated by AI to present their candidates in imaginary flattering settings. The percentage of people who said they were very or extremely interested in news has remained low at 45% compared to 77% in 2017.

Decades-old newspaper *Ámbito Financiero* discontinued its print edition, while circulation of other dailies has continued to fall. *Clarín*, the top-selling print newspaper in Argentina, reported an average daily print circulation of 51,000 by the end of 2023, down from 65,000 the previous year,[102] and far from the average 250,000 circulation it had only a decade ago. Although the digital subscription base grew from 550,000 to 712,000, dwarfing print, the paper still earns much more from print than digital. *Clarín´s* main competitor, *La Nación*, saw its digital subscriber base remain relatively stable at 378,000.[103]

Online news outlets tend to opt for either subscription or voluntary contributions. While legacy print media, such as *Perfil* and *El Cronista* have maintained their paywalls, digital natives such as Cenital and elDiarioAR have relied on a membership system. By the end of 2023, Cenital was earning more than half its operating revenue from voluntary payments.[104]

The two top online news outlets in early 2024 were Infobae, accessed by four out of ten (40%) respondents, and the website and apps of cable news channel TN, which 30% report having visited. Neither have subscription programmes. Although willingness to pay for news has increased by 3 percentage points to 15%, half of subscribers report paying less than the equivalent of two US dollars each month.

Broadcast television viewership continued its decline, with 18.4% average ratings spread across all stations during 2023, down from 19.6% the previous year.[105] Online video has increased its relevance as a source of news according to our survey: two-thirds of the audience access short-form videos for information at least weekly, mainly on social media platforms. Online live video, which relies on a mix of news and entertainment, surged during the pandemic and has increased its popularity and sophistication. Luzu TV started as an online talk show and has grown into a YouTube channel with 1.33 million subscribers. It streams a variety of programmes from 8 am until 11 pm. Its main competitor, Olga, which interviewed football star Lionel Messi in 2023, now has over half a million subscribers. It features radio and television personalities in its daily programming. Many legacy radio stations have taken up the video streaming format, transmitting their programming on YouTube as well as on their traditional broadcast formats.

The appearance of online live video could reflect audience weariness of broadcast and cable television news, which are mostly owned by large private conglomerates and have tended to reflect the country's political polarisation. President Milei's rise to power has not appeared to challenge that, since print, radio, and television were mostly clearly divided either in support or in opposition camps.

Eugenia Mitchelstein and
Pablo J. Boczkowski
Center for the Study of Media and Society, Argentina (MESO)

[102] Grupo Clarín Financial Statement 2023. https://ir.grupoclarin.com/en/quarterly-results/
[103] Media Kit, *La Nación*. https://www.lanacion.in/
[104] Cenital, Balance 2023. https://cenital.com/ahora-mas-que-nunca/
[105] Kantar Ibope.

WEEKLY REACH OFFLINE AND ONLINE

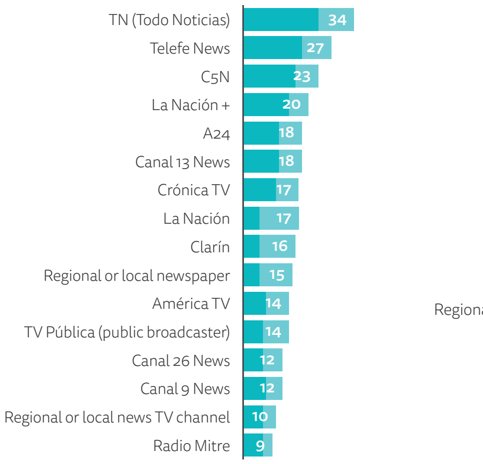
TOP BRANDS

% Weekly usage

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

15% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT

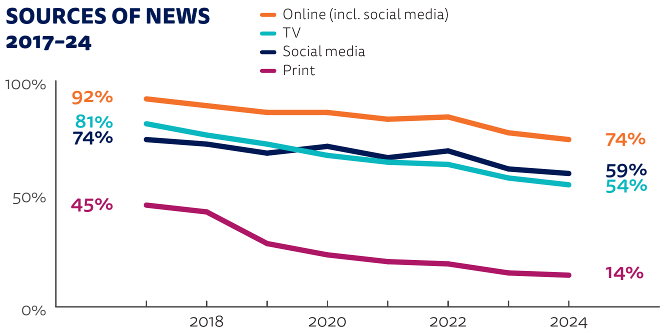


ONLINE

CHANGING MEDIA

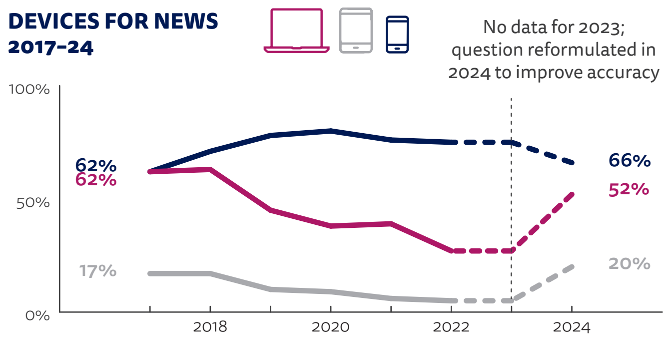
News consumption on all outlets, from print and television to online and social media, has consistently declined over the past eight years, which reflects persistent levels of distrust and growing news avoidance.

SOURCES OF NEWS 2017–24



DEVICES FOR NEWS 2017–24

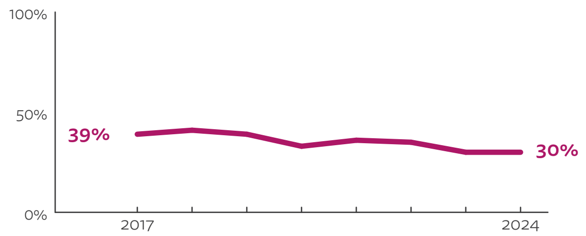
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

The percentage of members of the audience that trust the media in general has remained low, at 30%, while 36% say they trust the news sources they use. Argentina is among the countries with lowest levels of media trust. However, individual brands such as Telefé Noticias and TN have continued to be perceived as trustworthy for at least half of the respondents.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

30% OVERALL TRUST =42/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 63.13	66/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
A24	43%	32%	26%
C5N	34%	22%	44%
Canal 13 News	47%	28%	25%
Clarín	41%	27%	33%
Cronista	33%	37%	30%
Infobae	49%	28%	23%
La Nación	49%	26%	25%
La Voz	33%	39%	27%
Minuto Uno	35%	39%	26%
Página/12	34%	32%	33%
Perfil	32%	38%	31%
Regional or local newspaper	42%	37%	21%
Telefe News	55%	27%	18%
TN (Todo Noticias)	50%	25%	25%
TV Pública News	35%	30%	35%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	37% (-9)	60%
2	Instagram	33% (+1)	55%
3	WhatsApp	33% (+2)	69%
4	YouTube	31% (+4)	61%
5	TikTok	15% (+4)	29%
6	X (formerly Twitter)	11% (-)	17%

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

Population	215m
Internet penetration	83%

BRAZIL

Brazil's politics remains deeply polarised following close-run elections in 2022 and subsequent attempts to overturn the result, which included riots and the storming of the National Congress. Media ownership remains concentrated, with a number of large, privately owned conglomerates running outlets across broadcast, print, and online. But these businesses are coming under pressure as audience habits change.

A year after the national poll that saw leftist Luiz Inácio Lula da Silva narrowly overcome former far-right president Jair Bolsonaro, Brazilians remain more divided than ever. An opinion survey by the research institute Quaest showed that in February, 83% of Brazilians believed that the country was more divided than united, up from 64% just six months earlier.[106] In June 2023, a panel of judges of Brazil's highest electoral court concluded that Bolsonaro had abused his power during his failed re-election bid and had cast baseless doubts on the national electronic voting system. Bolsonaro, 69, was barred from running for office again until 2030.

The former president and many of his allies, including former ministers and high-ranking military officers, are being investigated by the federal police for allegedly plotting a military coup. Since early 2023, the arrests and the ongoing legal inquiry have dominated the political headlines. Combined with conflict in the Middle East and Ukraine, the heavyweight news agenda might have been the cause of a sharp increase in news avoidance.

The proportion of respondents who avoid news often or sometimes reached 47%, up from 41% last year. Weekly reach of all the main news sources has declined in the past few years, including social media, where all the main networks have been on a downward path, except for TikTok, where Lula and Bolsonaro still post regularly. Despite their efforts to grow an audience on TikTok, the news media are no match for the most well-known personalities there. The largest broadcaster in the country, TV Globo, has around 6 million TikTok followers while comedian Whindersson Nunes has 22.4 million.

Brazil has struggled with misinformation being spread on social networks. In our survey, TikTok and X are considered the least trustworthy of the top networks for news – 24% of users of both platforms say it's difficult to tell trustworthy and untrustworthy news content apart.

There was an unsuccessful attempt to pass a bill regulating digital platforms and misinformation last year. The tech firms fiercely opposed the 'fake news bill', which would make digital platforms responsible for preventing the spread of falsehoods and hate speech. There was even a short-lived stand-off with the government when Google put a link on its homepage opposing the law, enraging the justice minister, who threatened an hourly fine. Google backed down after a few minutes. After four years of discussions in Congress, the bill was abandoned. In April, the president of the House of Representatives, Arthur Lira, announced the creation of a group to discuss a new regulation proposal.

There are concerns about the use of generative artificial intelligence to create fake campaign images targeting candidates or parties in this October's municipal elections. In late February, the Supreme Electoral Court issued a ruling banning deepfakes from official election campaign material. The court also ruled that any synthetic multimedia content should have a label stating it was created using AI. The fast-paced development of AI also prompted Editora Globo, one of the largest magazine and book publishers, to bar AI companies from crawling its content to train their generative models. However, some are finding new opportunities: the daily *O Estado de S. Paulo* launched a chatbot which uses its previously published content to answer questions posed by readers.

The downward trend in circulation for the newspaper industry was reversed last year, but mainly as a result of a change in the criteria used to calculate the number of online subscribers. The average daily paid circulation for the ten best-selling newspapers rose by almost 14% over 2022 to 1.7 million, according to Instituto Verificador de Comunicação. A change in methodology had meant that even readers who paid extremely low promotional prices were now considered subscribers.

This boost was not reflected in jobs. A study commissioned by the National Federation of Journalists showed that while 9,500 professionals were hired last year, 10,400 jobs were lost.[107] There was promising news regarding safety, however – the federation found that the number of attacks against journalists fell by 52% to 181. The figures include physical aggression, threats, legal decisions restricting the freedom of press, and journalist arrests, among other types of violence.

Rodrigo Carro
Financial journalist and former Reuters Institute Journalist Fellow

[106] https://noticias.uol.com.br/politica/ultimas-noticias/2024/03/10/pesquisa-quaest-polarizacao-brasil.htm
[107] https://www.portaldosjornalistas.com.br/mercado-do-jornalismo-demitiu-mais-do-que-contratou-em-2023-diz-pesquisa/

WEEKLY REACH OFFLINE AND ONLINE

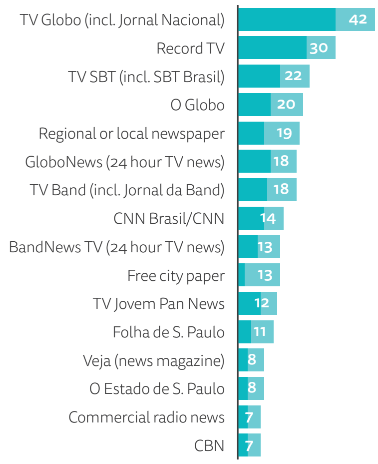
TOP BRANDS

% Weekly usage

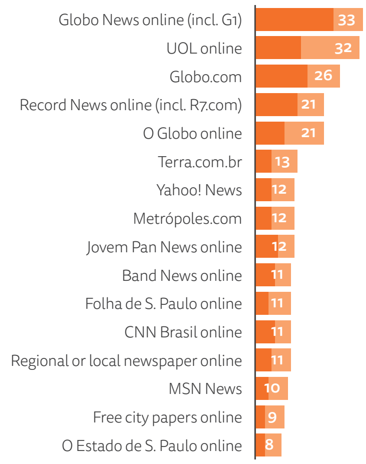
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

19% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



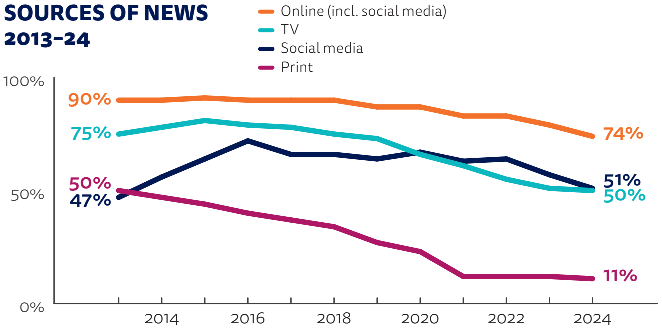
ONLINE



CHANGING MEDIA

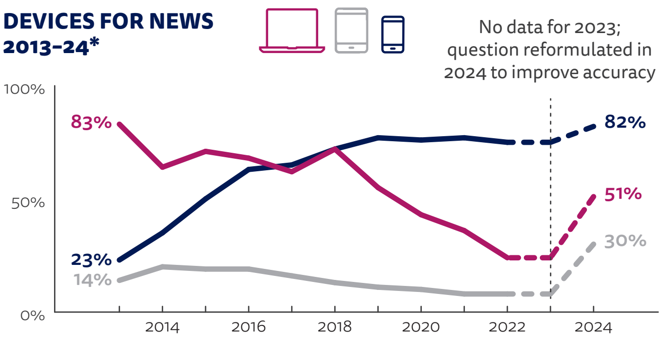
Although TV still gets most of the advertising money, its use as a news source has declined sharply since 2015. Print experienced a steeper fall but has stabilised in the last few years.

SOURCES OF NEWS 2013–24



DEVICES FOR NEWS 2013–24*

No data for 2023; question reformulated in 2024 to improve accuracy

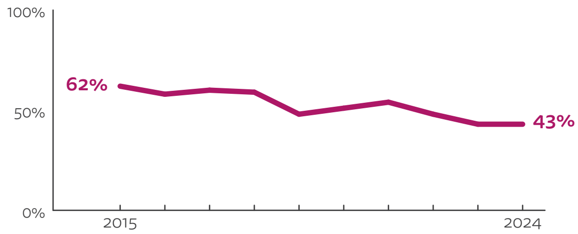


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Overall trust in news is unchanged from last year at 43%, after significant decreases in the last two years. Even so, Brazil ranks in first place, in terms of trust, among the six Latin American countries surveyed. Among those we include, big news brands along with their evening TV shows remain most trusted overall, along with the regional and local press.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

43%
OVERALL TRUST =15/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 58.59	82/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Band News (incl. Jornal da Band)	59%	20%	20%
Folha de S. Paulo	54%	19%	27%
Globo (incl. TV Globo, GloboNews, G1)	55%	16%	29%
Metrópoles.com	48%	27%	24%
O Estado de S.Paulo	54%	21%	25%
O Globo (newspaper)	54%	17%	29%
Record News (incl. Jornal da Record, R7)	60%	20%	19%
Rede TV	52%	25%	24%
Regional or local newspaper	61%	23%	17%
SBT News (incl. SBT Brasil)	62%	22%	17%
Terra.com.br	50%	27%	23%
UOL	56%	21%	24%
Valor Econômico	51%	27%	22%
Veja	50%	23%	28%
Yahoo! News	46%	29%	24%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

41%
SHARE NEWS
via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	WhatsApp	38% (-5)	68%
2	YouTube	38% (-3)	64%
3	Instagram	36% (-3)	58%
4	Facebook	29% (-6)	51%
5	TikTok	14% (-1)	28%
6	X (formerly Twitter)	9% (-5)	16%

Population	38m
Internet penetration	94%

CANADA

Canada is a bilingual market with high consumption of news from foreign sources, especially the USA. Engaging broad audiences online and generating revenue is increasingly difficult, especially for regional and local news outlets, as news content is no longer visible on Meta's social media platforms in response to new legislation.

The Canadian government's Online News Act, introduced last year, required tech companies to compensate news organisations for showing their content on their platforms. Google eventually secured a deal to contribute around US$73m a year to be distributed among Canadian news publishers, but Facebook's parent company Meta played hardball, blocking news media posts and links from its top networks. The ban led to an outcry, with some newspapers publishing a blank front page in protest and a number of large advertisers withdrawing their business from Meta platforms.

Almost a year after the boycott, many big media companies have adjusted their strategies and overall traffic to Facebook itself is largely unaffected – though news consumption and sharing is down 15pp in the past two years, at its lowest level since our survey began.

News consumption on some other networks, such as YouTube and TikTok, is up, but small regional and local outlets which relied heavily on Facebook traffic say they are suffering – not the outcome policymakers were hoping for when they introduced the legislation.

Part of the money from the Google deal will go to broadcasters, including public media CBC and Radio-Canada, which had announced cuts at the end of 2023 but subsequently obtained an increase in public funding. The bulk of the money is to be distributed among eligible organisations based on the number of journalists employed, and will be allocated by a collective body which will settle disputes.

Big national brands like the *National Post* and *Globe and Mail* have been building subscription numbers but they face competition (free and paid) from US-based news brands such as CNN, Apple News, and the *New York Times*, which has signed up Canadian news consumers in large numbers over the past few years, according to our data.

Economic and structural pressures contributed to the reduction or closure of hundreds of local and hyperlocal news services, after a two-year relative lull.[108] The largest media-telecom group in the country, Bell Canada Enterprises, laid off 6,000 employees, more than 10% of its total workforce. Forty-eight of its radio stations were sold to regional entities, and six more were closed. Québecor, the largest media-telecom group in the Francophone market, eliminated one-third of jobs at Groupe TVA, its media branch, as part of a restructuring effort that involves, among other things, overhauling its news operations.

The end of a door-to-door flyer delivery service in Ontario and Quebec forced dozens of community newspapers to become digital only. The Metroland Media Group cut 650 jobs, while Métro Média ended operations in Montreal. SaltWire Network, owner of 23 newspapers in Atlantic Canada, filed for creditor protection, and Black Press Media, a group of 80 hyperlocal publications, was bought by Canadian institutional investors.

More positively, digital-born Village Media's model of bundling local information, such as weather, classified ads, school bus schedules, and community webcams, has allowed the company to expand its network across Ontario.[109] Digital French-language daily *La Presse* saw growth thanks to its boutique ad service, which asks readers to volunteer information through features such as quizzes. It also had a successful donation drive. Daily newspaper *Le Devoir* increased digital subscriptions by 13% and is now registered to issue tax receipts to donors.

AdPerfect, a Canadian software firm which already provides a classifieds platform to Metroland Media, partnered with the Torstar group for technology to host obituaries. The firm was recently acquired by Tribute Technology, a leading software provider to funeral homes in North America.

The Local Journalism Initiative, a subsidy programme for news in underserved communities, has been renewed, and the cap on expenditures for the journalism labour tax credit is set to be increased. Some provincial governments are also contributing to support news organisations. The city of Longueuil in Quebec committed to increase its ad spending, to promote local media and to help lobby Canada Post for free door-to-door delivery of local newspapers.

Amid concerns about misinformation produced with generative AI, organisations such as the *Globe and Mail*, *La Presse*, and CBC made public their preliminary guidelines for the use of AI. New tools are being incorporated into workflows, including automating some checking of content, while broadcasters have experimented with AI-produced transcripts and text summaries of interviews.

Colette Brin and **Sébastien Charlton**
Director and Coordinator, Centre d'études sur les médias, Université Laval

[108] https://localnewsresearchproject.ca/2024/02/05/local-news-map-data-reports/
[109] https://mediapolicy.ca/2024/03/05/jeff-elgie-canadian-media-unicorn/

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

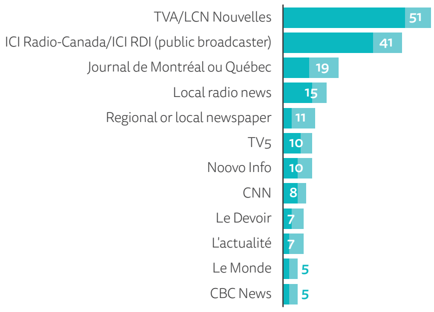
% Weekly usage

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

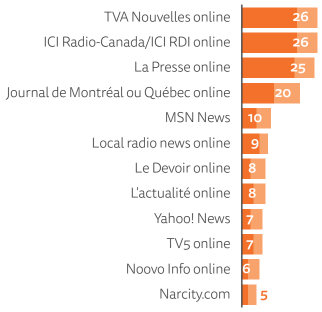
TV, RADIO, AND PRINT (ENGLISH SPEAKING)

ONLINE (ENGLISH SPEAKING)

TV, RADIO, AND PRINT (FRENCH SPEAKING)



ONLINE (FRENCH SPEAKING)



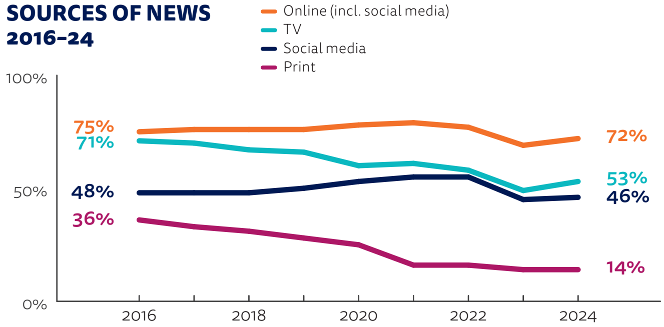
15% pay for **ONLINE NEWS**

English 16% | French 11%

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

English 44% | French 29%

SOURCES OF NEWS 2016–24



DEVICES FOR NEWS 2016–24*

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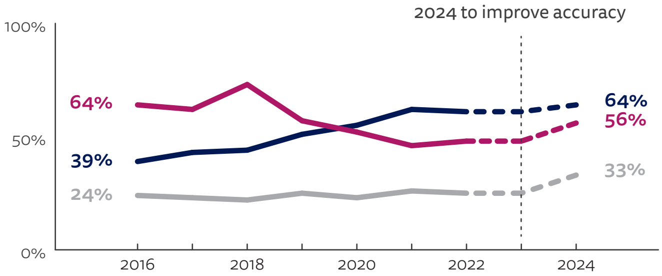
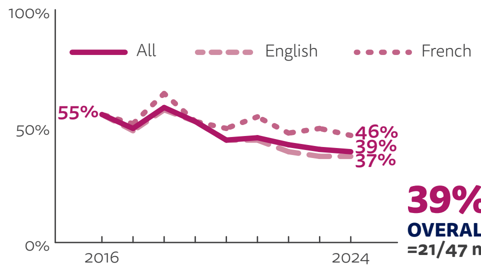


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST IN NEWS 2016–24



39% **OVERALL TRUST** =21/47 markets

The downward trend of overall trust towards news in Canada continues with a loss of almost 20 percentage points since 2018. Trust has fallen equally amongst English- and French-speaking markets. Despite this, trust for most individual brands has increased a little this year, with the most widely used being trusted by over 60% of those who are familiar with them.

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	YouTube	29%	(+4)	62%
2	Facebook	25%	(-4)	60%
3	Instagram	13%	(+3)	37%
4	X (formerly Twitter)	11%	(-)	18%
5	Facebook Messenger	11%	(-)	44%

PUBLIC OPINION ON BRAND TRUST

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

ENGLISH

Brand	Trust	Neither	Don't Trust
BBC News	60%	24%	16%
CBC News	63%	20%	17%
CityNews	59%	25%	16%
CNN	54%	21%	25%
CP24	52%	31%	18%
CTV News	66%	19%	15%
Fox News	32%	20%	48%
Global News	65%	20%	15%
Globe and Mail	58%	25%	17%
MSN News	42%	33%	24%
National Post	55%	27%	18%
Regional or local newspaper	65%	23%	12%
The New York Times	54%	26%	20%
Toronto Star	52%	28%	20%
Yahoo! News	36%	39%	25%

FRENCH

Brand	Trust	Neither	Don't Trust
CTV News	52%	36%	12%
ICI Radio-Canada/ICI RDI	74%	17%	9%
Journal de Montréal ou Québec	61%	24%	16%
L'actualité	63%	27%	10%
La Presse	68%	22%	10%
La Presse Canadienne	66%	25%	9%
Le Devoir	63%	26%	11%
Les coops de l'information (6 regional newspapers in Quebec)	58%	29%	12%
MSN Actualités	40%	38%	22%
Narcity.com	28%	39%	33%
Noovo info	54%	34%	12%
Regional or local radio	62%	29%	9%
Regional or local weekly newspaper	61%	28%	11%
TV5	57%	32%	11%
TVA Nouvelles/LCN	67%	17%	15%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

WORLD PRESS FREEDOM INDEX SCORE 2024 | Score: **81.7** | **14**/180

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

Population	19m
Internet penetration	97%

CHILE

Chile has been remembering the 50th anniversary of the coup d'état that ushered in 17 years of dictatorship, at a time of increased political polarisation and strained relationships between press and government. Yet amid the challenges, new players and innovative approaches have emerged.

Chile has spent several years wrangling over a new constitution to replace one from the dictatorship era. The most recent moves involved selecting advisers to draft a new document and holding a referendum to approve it, after an earlier attempt was rejected. The proposed new constitution was also rejected. While the first draft had primarily represented a left-wing agenda, the second concentrated on ideas from the right, underscoring the country's polarisation and contributing to a growing disillusion with news and politics overall and to greater levels of news avoidance.

The media did not cover this process with the same enthusiasm as they had first time around. Instead, crime dominates the news agenda – a study by the National Television Council of Chile showed that crime news occupied the most screen time in each broadcast, with TVN, the country's sole public channel, an exception.[110]

The second year of left-wing President Gabriel Boric's administration was marked by a strained relationship with the press, partly due to this change in news coverage. Speaking in front of a national business conference, he said: 'Honestly, I read the newspapers very little these days. But it's impressive how there's a preference for the bad news. I don't know how those who keep reading *El Mercurio*, *La Tercera*, *La Segunda* [right-wing and centrist newspapers] end up feeling afterward because, honestly, it's as if we live in a hellish country. And we're not about that.' The remarks were criticised by national and international journalism organisations, but the government argued that the comments were just an invitation for the media to reconsider their priorities rather than direct criticism.

Within this growing tension there was also public debate about the government's initiative to convene an Advisory Commission against Disinformation.[111] This body, comprising experts from several disciplines, received a mixed welcome from journalists, academics, and politicians, many of whom were sceptical about the intentions behind the plan. The government insisted the commission was an expert body, and its work concluded with two reports compiling academic research and information from foreign experiences.

In 2023, Chile marked 50 years since the Chilean Armed Forces bombed La Moneda, the Government Palace, which led to 17 years of right-wing military dictatorship under Augusto Pinochet. Guidelines for covering the anniversary came from the National Institute of Human Rights and the National Television Council, in itself perhaps a demonstration of current polarisation. The guidelines emphasised the relevance of acknowledging the violation of human rights during the dictatorship and the duty of news media to avoid disinformation, hate, and denialist speech.

News outlets prepared special coverage using archives and documentary research to tell previously untold stories from the time. They formed partnerships with NGOs, museums, and universities to compile these narratives and develop innovative digital products such as dramatic audio recreations and combined digital/physical experiences. Television news consumption increased slightly, perhaps due to the deployment of news journalists to support their sports news colleagues in covering the Pan American Games, hosted this year by Chile.

Chilean media is largely centralised in Santiago, but it was a local outlet, Timeline, based in the port city of Antofagasta, 1000 km north of the capital, that gained national attention by uncovering a corruption scandal involving politicians from the ruling party.

Chile's newspapers are dominated by two conglomerates centred around the big players *La Tercera* and *El Mercurio*. However, a new player, Spain's Prisa Group, has entered the market, with an online Chilean edition of *El País* that uses a subscription model, and its first Chilean journalism-based podcast, a controversial true crime documentary. A new right-leaning FM radio station, La Metro, launched and CNN's Chilean output was acquired by lawyer and entrepreneur Jorge Carey, who secured the rights to the brand for ten years after serving as an executive at the channel.

Independent site Copano.news is among those experimenting with AI, saying it publishes more than 40 articles every day using an AI-powered CMS, and consistently sees its stories trending on social media. Another example is WazNews, a virtual assistant delivering text and audio on demand via WhatsApp. After a series of AI options, users are given the option to hear news stories narrated by journalists.

Francisco J. Fernández and **Enrique Núñez-Mussa**
Pontificia Universidad Católica de Chile/ Michigan State University

110 https://cntv.cl/estudio-repositorio/temas-y-actores-en-noticieros-centrales-de-la-tv-abierta-septiembre-y-octubre-2023/
111 https://www.minciencia.gob.cl/areas/comision-contra-la-desinformacion/

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

Weekly use
TV, radio & print

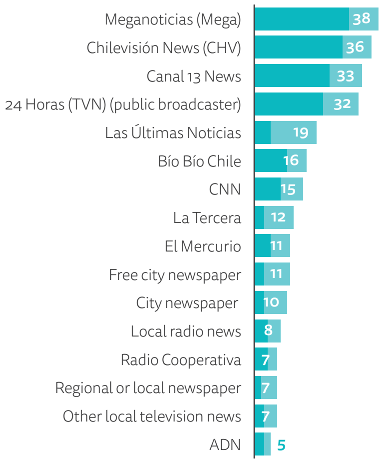
More than 3 days per week
TV, radio & print

Weekly use
online brands

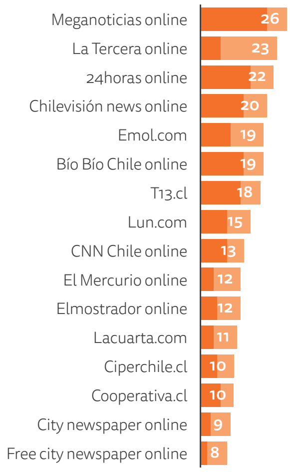
More than 3 days per week
online brands

12%
pay for
ONLINE NEWS

TV, RADIO, AND PRINT



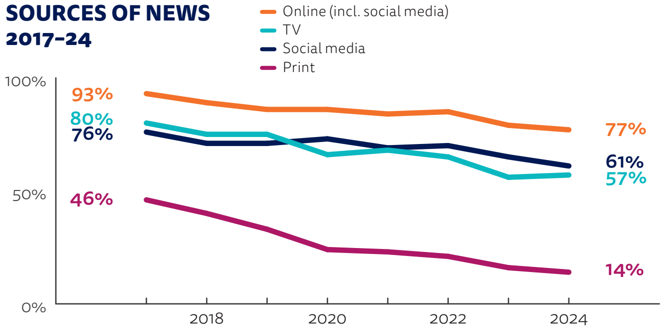
ONLINE



CHANGING MEDIA

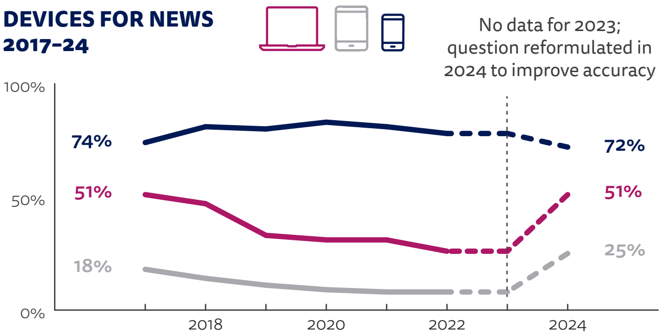
News consumption has declined across all sources since 2017, with television news and printed newspapers seeing the biggest falls. News use via social media platforms such as Facebook and X is also significantly down this year.

SOURCES OF NEWS 2017–24



DEVICES FOR NEWS 2017–24

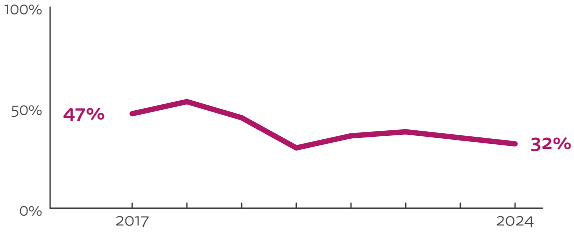
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in the news (32%) is nearing its lowest point since 2017, and is amongst the lowest in our global survey. This trend aligns with a backdrop of political polarisation and recurring elections, some featuring binary options that tend to divide the country between right-wing and left-wing alternatives.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

32%
OVERALL TRUST
=35/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 67.32	52/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
24 Horas	55%	24%	21%
Bío Bío Chile	64%	20%	16%
CHV Noticias (CHV)	56%	24%	21%
CIPER Chile	48%	30%	21%
CNN Chile	63%	21%	16%
Cooperativa	61%	23%	16%
El Mercurio	50%	23%	27%
El Mostrador	44%	33%	22%
Emol.com	46%	27%	26%
Free city newspaper	45%	33%	22%
La Tercera	50%	25%	25%
LUN	41%	29%	29%
Meganoticias (Mega)	57%	22%	22%
Regional or local newspaper	52%	31%	17%
Tele 13 (Canal 13)	54%	24%	22%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

45%
SHARE NEWS
via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	43%	(-7)	65%
2	Instagram	34%	(-)	57%
3	WhatsApp	31%	(-3)	68%

Rank	Brand	For News		For All
4	YouTube	28%	(-3)	60%
5	TikTok	19%	(+1)	36%
6	X (formerly Twitter)	10%	(-6)	18%

Population	52m
Internet penetration	83%

COLOMBIA

The Colombian media landscape is vibrant, albeit within a concentrated market. There are three particular challenges: a fall in news consumption, rising concern about the role of artificial intelligence, and the influence of publicly funded advertisements on press independence.

Faced with falling audiences and the increasing difficulty of building direct web traffic, the media in Colombia have welcomed advertising spending from national and local governments. This has brought its own problems, with growing concerns about balance and impartiality, particularly surrounding the regional elections for governors and mayors which took place in October 2023.

The Foundation for Freedom of the Press reported that official advertising had been used to 'bind loyalties, silence critics, enhance the image of politicians and violate the most elementary principles of state contracting'. According to the publication *National Survey on Freedom of Expression and Access to Information*, 44% of the 585 journalists, columnists, editors, and other news staff workers surveyed stated that they knew of a local media outlet that had stopped publishing something for fear of losing government advertising and almost half the respondents said they knew of a journalist or media outlet that had changed editorial position for a public advertising contract.

On top of this, the role played by public media has been questioned, with accusations that its state funding is used to defend the governments in power and underplay the views of opposition parties.

Meanwhile, violence and attacks against journalists continue to prevail with the assassination of social leader and citizen journalist Jaime Vásquez by hitmen in the border city of Cucuta.

Overall, things are not looking good for the mainstream media. Consumption of top journalism brands continues to decline, partly due to news avoidance (44%), low levels of trust in the media (34%), online misinformation, and polarisation. The falls seem to be across the board, even for big free-to-air TV news channels like Caracol News, part of the privately owned Grupo Valorem, which saw a dip in its weekly audience in our figures. The channel's main competitor, RCN News TV, part of Ardila Lülle Organisation, remains in second place, with a quarter of people saying they accessed it at least once a week.

Online news leader ElTiempo.com reached 25% of weekly users, a drop of 4 percentage points from last year, while CaracolTV.com remained flat in second place. Online aggregator Pulzo.com fell from 22% last year to 18% of weekly news use in 2024 and dropped to fourth place among top brands.

Facebook and X continue to tumble in overall popularity in Colombia and this has had an impact on their use for news. Facebook (48%) remains the most important social media platform to distribute news, but this represents a fall of 10 percentage points compared with last year. Just 12% of respondents said they used X for news, a drop of 6 points from 2023.

This declining engagement contrasts with the continued heavy use of social platforms by Colombian journalists and news organisations, both as a source of news and to set agendas. Most journalistic, academic, economic, and political elites still debate on X, often in confrontational and uncivil ways, and this tone often seems to bleed through into heated debates in the mainstream media itself – arguably making the media seem even more out of touch with ordinary people.

Social media as a source for news has declined in Colombia, from 72% in 2022 to 61% in 2024, but TikTok continues to grow. Colombia is one of the top ten markets in our global survey, with 40% of respondents using the platform for any purpose and 22% saying they used it for news. Short- and long-form video news is an increasingly important way for Colombians to access and consume news, but this increases the challenge for publishers as there are even fewer opportunities to link back to websites and apps.

High hopes for benefits from generative artificial intelligence have become tempered. The industry is bracing itself for disruption as search engines, chatbots, and new browsers are expected to replace some of the functions currently played by media, especially in answering questions or points of fact. Deepfake videos have been distributed on social media impersonating TV anchors and journalists to convey misinformation. At the same time, media companies are looking to use AI to make workflows more efficient. And some, including *El Tiempo*, *El Espectador*, and Caracol TV, are using it to find new ways of converting occasional web visitors into regular subscribers.

Professor Víctor García-Perdomo
Director, Research Center for Digital Technology & Society, Universidad de la Sabana, Bogotá, Colombia.

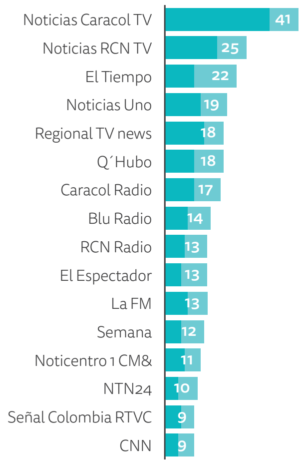
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

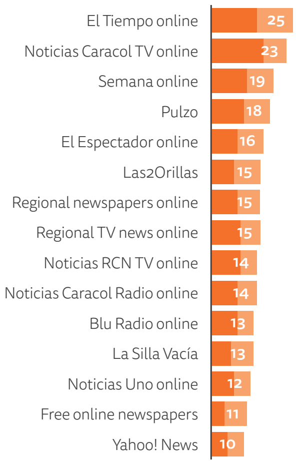
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

15% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



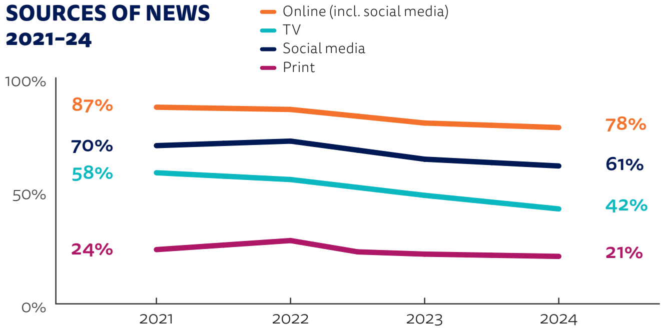
ONLINE



CHANGING MEDIA

Colombians in our more urban-based sample get their news more frequently online (including from social media) than from TV or print, which are both losing reach. Facebook remains the most important social network for news but is losing traction, especially with younger people.

SOURCES OF NEWS 2021–24



DEVICES FOR NEWS

Computer **54%**

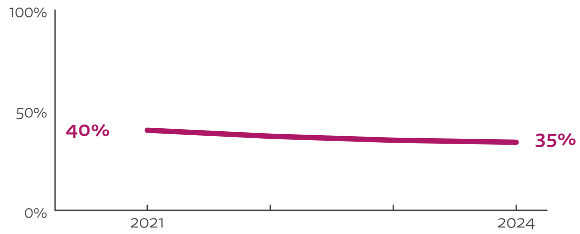
Smartphone **76%**

Tablet **28%**

TRUST

Overall trust in the news (34%) remains low by international standards and is down 6 percentage points since 2021. All media brands, with the exception of RCN Radio, also saw their scores fall over the last year. Independent TV and online media Noticias Uno (68%) are among the most trusted news brands surveyed, along with public broadcaster Señal Colombia (63%).

OVERALL TRUST SCORE 2021–24



Proportion that trusts 'most news most of the time'

34% OVERALL TRUST =31/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 49.63	119/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Caracol Radio	51%	21%	28%
Caracol Televisión	52%	19%	29%
El Espectador	58%	20%	22%
El Tiempo	57%	20%	23%
Las2Orillas	45%	29%	26%
NotiCentro 1 CM&	60%	22%	18%
Noticias Uno	68%	18%	14%
Pulzo	46%	27%	26%
Q´Hubo	44%	26%	30%
RCN Radio	49%	21%	30%
RCN Televisión	48%	20%	31%
Regional newspapers	54%	25%	21%
Regional TV news	62%	22%	16%
Semana	46%	19%	35%
Señal Colombia	63%	21%	16%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

48% **SHARE NEWS** via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	48% (-10)	65%
2	WhatsApp	41% (-)	69%
3	YouTube	34% (-2)	62%
4	Instagram	29% (-)	49%
5	TikTok	22% (+2)	40%
6	X (formerly Twitter)	12% (-6)	18%

Population	132m
Internet penetration	67%

MEXICO

Mexico has elected its first female president, Claudia Sheinbaum, candidate for the ruling Morena party and former mayor of Mexico City. But though the political climate may be changing, Mexico's news still faces multiple challenges, from political attacks to physical safety. While decreasing advertising adds pressure to business models, the lure of artificial intelligence is becoming stronger.

This year, the main candidates for president in Mexico were both women for the first time. They communicated with their potential voters, most of whom are young, not only via traditional press channels but through social networks and online video.

This year's presidential contenders represented two coalitions: Claudia Sheinbaum Pardo for an alliance of Morena (López Obrador's party), Labor, and the Greens, and Xóchitl Gálvez Ruíz heading an alliance of left, centre-right, and conservative parties called Frente Amplio por México (Broad Front for Mexico). Galvez's campaign adopted an innovation started by the outgoing president – morning broadcasts titled *Mañaneras de la Verdad* (Morning Truths), distributed through X, Facebook, and YouTube. This came after she had turned up at one of López Obrador's morning briefings, having obtained a court order securing a right of reply to false claims he had made about her.

A third candidate, Jorge Álvarez Máynez, represented Movimiento Ciudadano (Citizens' Movement political party). At 38 he was the youngest candidate and used TikTok to communicate directly with young people, a highly significant group in this election, in a fun way. Máynez claimed to be the candidate of a 'new politics'.

June's elections also marked the end of the administration led by President Andrés Manuel López Obrador (AMLO) – Mexican presidents are limited to a single term – though in some ways it was a referendum on him. His final year in office was much like earlier ones – regular verbal attacks on journalists, human rights advocates, and the media generally.

The highest profile verbal attack from the outgoing president this year was on *New York Times* reporter Natalie Kitroeff, when he displayed a letter during a broadcast which contained her personal information, even reading out her phone number. YouTube removed the video, saying it contravened its anti-harassment policies. The president was unapologetic, accusing YouTube of censorship. The *Times* said it was a 'worrisome tactic' from a world leader.

Physical attacks on journalists have not subsided in the past year, with 15 murders recorded. In one ten-day stretch in December, the Committee for the Protection of Journalists reported, eight journalists were either abducted or shot at in four separate incidents. As one widely reported example, television and radio anchor Jaime Barrera was seized and bundled into a car as he left a radio station where he worked. He was held hostage overnight while his captors demanded he tell them whose orders he follows – among his coverage of politics and other issues he also reports on drug trafficking. He said afterwards it had been an attempt to intimidate him. One possible reason for the incident is that his daughter sits on the ruling council of the president's Morena party. Barrera has worked in various media companies, such as Televisa Guadalajara, Canal 44, and the newspapers *El Informador* and *Milenio.*

The creation of the Mexican Information Agency (AMEXI) was significant as it followed the final closure of the state-owned news agency Notimex, which had been operating for more than 50 years. Notimex had been hit by industrial disputes but its closure was seen by opponents of the president as another attempt to control information. AMEXI was founded by former Notimex employees, primarily women.

Televisa-Univisión, which was the result of a merger of Grupo Televisa and US-based Spanish-language network Univision, cut more than 200 jobs involving long-running programmes and well-known broadcasters, blaming 'the evolution of the media landscape'. Its ViX streaming platform did what Netflix, Disney+, and Amazon Prime have done and introduced advertising to its paid plans.

More people are using TikTok for news – up 3 percentage points to 18%. Law student Gerardo Vera, 19, is one of many individuals to have used the platform to tell stories for a younger generation. Having started covering news on social media aged just 12, he now has more than 2 million followers on the platform. He produces daily videos which attempt, in his words, to 'democratise public knowledge', and has received recognition for his efforts to try to remain impartial.

New rules to regulate the use of AI are being drawn up by the Federal Telecommunications Institute, but the media aren't waiting. One radio station, Radio Fórmula, introduced an AI-generated newsreader, with the aim of delivering impartial and reliable bulletins. In our Digital News Report survey, only 37% of respondents said they feel comfortable using news produced by human journalists with the help of AI.

María Elena Gutiérrez-Rentería
Universidad Panamericana

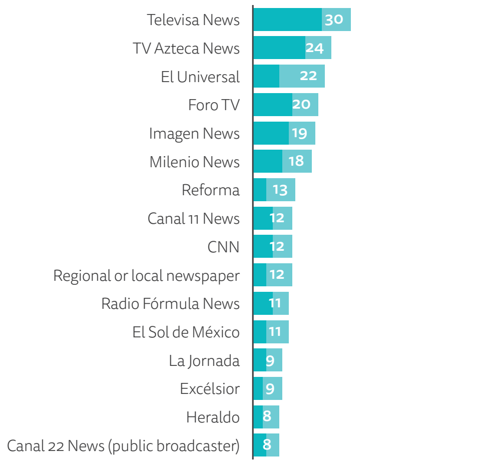
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

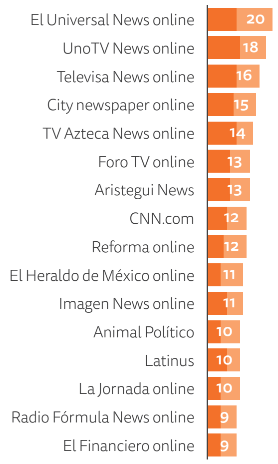
- **Weekly use** TV, radio & print
- **More than 3 days per week** TV, radio & print
- **Weekly use** online brands
- **More than 3 days per week** online brands

18% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



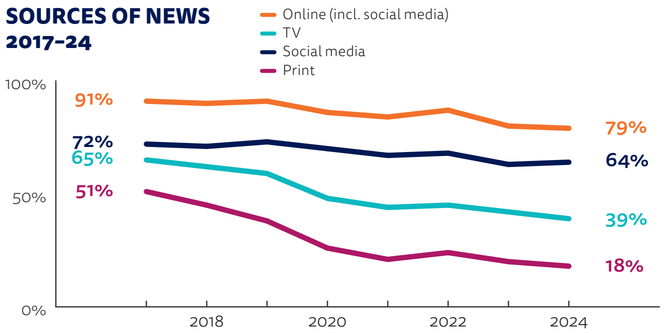
ONLINE



CHANGING MEDIA

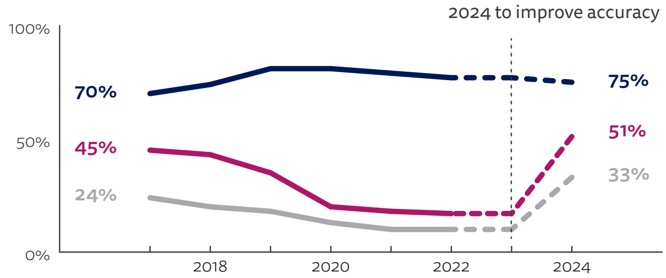
News consumption from print and television has become consistently less important over time for our online sample, with social media widely used across age groups. Mexicans are heavy users of social media, with TikTok growing fastest for news.

SOURCES OF NEWS 2017–24



DEVICES FOR NEWS 2017–24

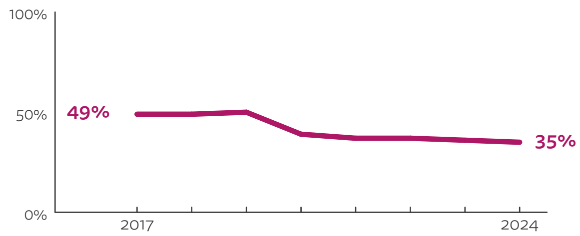
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in the news declined by around 15pp after the election of populist president Andrés Manuel López Obrador in 2018. During his term, he regularly attacked the news media and journalists critical of his government. CNN is the international journalistic brand most trusted by the citizens, of those included in our survey, followed by the newspaper *El Universal* and Imagen Noticias.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

35%
OVERALL TRUST
=26/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 49.1	121/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Aristegui News	57%	21%	22%
Canal 22	61%	24%	15%
CNN	69%	18%	13%
El Economista	59%	24%	17%
El Financiero	60%	23%	17%
El Universal	64%	19%	17%
Imagen News	63%	20%	17%
Latinus	46%	24%	30%
Milenio News	63%	20%	17%
Radio Fórmula News	62%	20%	18%
Reforma	58%	22%	20%
Regional or local newspaper	57%	25%	18%
Televisa News	52%	19%	30%
TV Azteca News	57%	20%	23%
UnoTV	60%	23%	17%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

47%
SHARE NEWS
via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	50% (-6)	70%
2	YouTube	34% (-5)	64%
3	WhatsApp	28% (-2)	66%

Rank	Brand	For News	For All
4	TikTok	18% (+3)	40%
5	X (formerly Twitter)	14% (-1)	23%
6	Instagram	13% (-1)	37%

Population	34m
Internet penetration	87%

PERU

Mainstream media have been badly affected by the economic downturn with falling advertising revenue, leading to layoffs and cost-cutting. But consumption of news remains steady in a year that was marked by violent protests and revelations about the judicial system being weaponised against journalists.

After a troubled few years for Peru, in which a constitutional upheaval saw the country's first female president, Dina Boluarte, ascend to power, only to face violent protests which were put down even more violently – 49 people were killed by the police and army – there is at last a period of relative calm. The superiority of Congress has been re-established, even though acceptance rates are still in single digits.

The fallout from these events continues, however, with a widely held sense of injustice for those killed in the protests. There is also economic unease due to recession and high unemployment.

At the same time the press has found itself the target of judicial harassment which, according to the Inter-American Commission of Human Rights[112] and the National Association of Journalists,[113] has increased year on year. Connections were exposed between the office of the attorney general, Patricia Benavides, and political and religious organisations that have been pursuing prosecution for investigative journalist Paola Ugaz. She, with other reporters, exposed sexual harassment and abuse inside Sodalicio de Vida Cristiana, a Catholic religious organisation. Two other journalists, Juan Carlos Tafur from digital investigative site Sudaca.pe and César Romero of *La República*, who were suspected of having investigated Benavides's educational record, became subjects of police surveillance. More widely, journalists reported an increase in harassment from local and national government officials and their agencies, even citing instances of official social media accounts being used to discredit reports.

Online investigative outlet IDL-Reporteros won the two most important journalism awards in the country for their work piecing together multiple video sources and geolocation to show that many of the 49 victims of the protests had not been taking part and were unarmed. Some of them were children. The government still maintains the protesters were part of terrorist cells, though there is no evidence for this.

Mainstream media continue dealing with shrinking markets. The two largest media groups, El Comercio and Grupo La República, reported significant drops in advertising revenues in 2023. El Comercio had a 16.7% drop in revenues and an overall loss of more than US$19m, and laid off about 150 journalists and staff. More reductions may be in the pipeline and it's reported that a further round of reorganisation is being considered, which could include selling off some non-key brands.[114] On the other side, Grupo La República closed several regional branches and laid off about 200 journalists and employees at the end of the year.

This year, just over half (53%) of our survey respondents said they were extremely or very interested in news. This is a 6-point drop from last year and an 8-point drop from 2022. Even so, weekly news reach to major news brands has largely maintained last year's levels.

However, there was an across-the-board drop in the use of social media for news compared to last year, with Facebook seeing the greatest decline (-13%), as parent company Meta has made it clear that it is less focused on promoting news content. Peru continues to be among the five countries in the report with the largest use of TikTok for all purposes (47%) as well as for news consumption (27%).

One beneficiary of this growth has been reporter Fernando Llanos who was laid off from broadcasters America Noticias and Canal N after a 15-year career. He turned to TikTok fulltime and in a matter of weeks had gained 700,000 followers for content that includes a daily 90-second newscast 'Las 5 Pepas de Llanos' (Llanos's five scoops). Llanos seems to be monetising his TikTok account through LIVE Gifts, a programme that allows followers to send virtual gifts that can be turned into money. Our survey shows that Peruvians consume more long- and short-form video than most other countries. Among the 95% of respondents who said they use videos for news, 85% said they watch at least one news item in short-form video each week, and 39% watch every day.

Finally, after 35 years, there was justice for the killing of journalist Hugo Bustíos, with the sentencing to 12 years' imprisonment for former presidential candidate and retired army general Daniel Urresti, the last of a group to be convicted of his murder.

Lourdes M. Cueva Chacón
San Diego State University

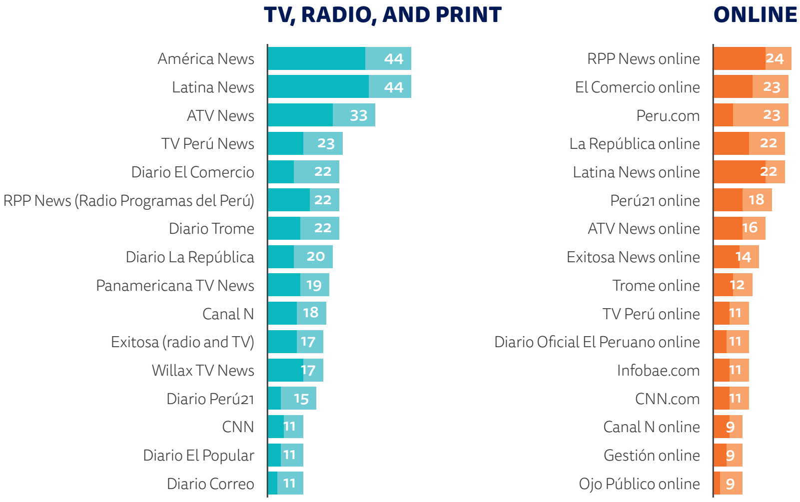
[112] https://www.oas.org/es/cidh/expresion/publicaciones/Informe%20Libex%20Peru%20(7).pdf
[113] https://anp.org.pe/anp-registro-352-ataques-a-la-libertad-de-prensa-en-el-2023-cifra-record-en-el-siglo-xxi/
[114] https://semanaeconomica.com/sectores-empresas/medios-de-comunicacion/grupo-el-comercio-diarios-prensa-perdidas-despidos-desinversiones-duras-decisiones-estarian-mesa-negociacion

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

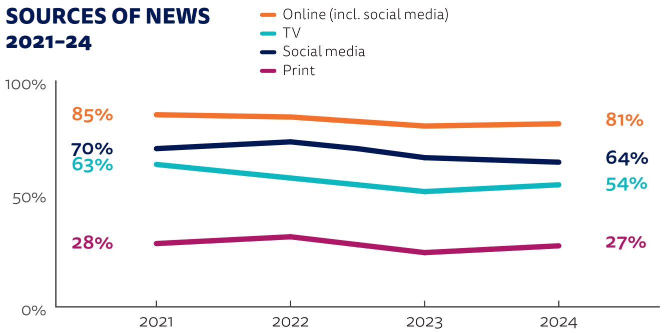
16% pay for **ONLINE NEWS**



CHANGING MEDIA

There has been a slight recovery in print and TV as news sources but use of online news sources has remained stagnant.

SOURCES OF NEWS 2021–24



DEVICES FOR NEWS

Computer **69%**

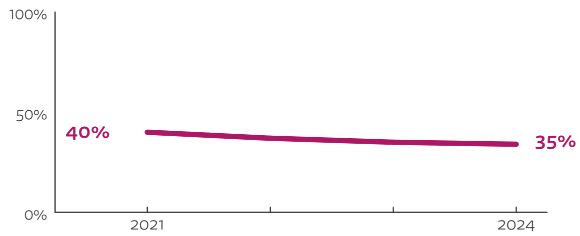
Smartphone **79%**

Tablet **32%**

TRUST

The proportion that trusts 'most news most of the time' (35%) remains low by both global and regional standards. Many Peruvians see the media as not sufficiently independent from powerful business and political interests. However, some news brands with a long heritage, such as the largest broadcast network RPP Noticias and *El Peruano*, a paper first established by Simón Bolívar in 1825, are trusted by over 50% of our respondents.

OVERALL TRUST SCORE 2021–24



Proportion that trusts 'most news most of the time'

35% OVERALL TRUST =26/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 47.76	125/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
América TV News	47%	24%	29%
Canal N	54%	23%	24%
El Comercio	57%	20%	23%
El Peruano	59%	23%	18%
Exitosa	50%	24%	27%
Gestión	54%	23%	23%
La República	54%	21%	24%
Latina News	52%	23%	25%
Local newspaper, radio, or TV	47%	29%	24%
Ojo Público	38%	28%	34%
Panamericana News	49%	27%	24%
RPP News	63%	19%	18%
Trome	34%	24%	41%
TV Perú News	53%	25%	22%
Willax TV News	44%	21%	35%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

52% **SHARE NEWS** via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	53% (-13)	72%
2	YouTube	34% (-5)	64%
3	WhatsApp	31% (-5)	65%
4	TikTok	27% (-3)	47%
5	Instagram	22% (-)	45%
6	X (formerly Twitter)	10% (-4)	16%

SECTION 3

SECTION 3

Analysis by Country and Market
Asia-Pacific

Population	26m
Internet penetration	90%

AUSTRALIA

The past year has been marked by persistent inflation, a rising cost of living, and severe flooding in many parts of Australia. Late in 2023, following a divisive campaign laden with misinformation, Australians voted against an amendment to the constitution to establish an Australian Indigenous Voice to Parliament.

It is a critical time when audiences are in need of quality news yet the news ecosystem continues to shrink. Australia now has 29 local government areas with no local news publishers, TV, or radio servicing the local community. Print media have been hit hard due to the decline in advertising revenue and rising print costs. Government departments are cutting back print advertising and instead rolling out campaigns on social media. In 2023, the Victorian government announced they would cease all metropolitan print newspaper advertising. For regional news outlets the reduction in government advertising spend is worrying and they are lobbying for a more consistent policy. Currently the local, state, and federal governments spend about 1% of their advertising budget on regional news.

Streaming services continue to grow, and their weekly reach (58%) has surpassed that of free-to-air TV (54%). However, the cost-of-living crisis has been forcing audiences to cut back on their digital subscriptions. One in three subscribers say they have reduced their subscriptions.[115] The major streaming services such as Netflix, Amazon Prime, Paramount+, and Binge have reduced their spending on local content by 11% (A$46m). The government has promised to introduce a quota system for streaming services in 2024. The media industry is advocating for a 20% local content quota while streaming platforms are lobbying for 2%.

In March 2024, Facebook's parent company, Meta, shocked the sector by declaring they were pulling back from news, closing their Australian news partnerships team, and not entering new commercial deals with news organisations. Their current deals with major companies are reported to be worth A$70m annually. This follows the Australian government's introduction of the News Media Bargaining Code in 2021. Under the Code, Google and Meta are together paying news publishers roughly A$200m a year on voluntary content agreements. This has helped sustain the news industry, but most agreements expire this year. There are now calls to 'designate' Meta under the Code, which would force the company to negotiate with publishers or face fines of 10% of its annual Australian revenue. Google and Meta's combined advertising revenue in Australia was A$8.3bn in 2023. This is more than half of all digital ad revenues (A$14.2bn).

In late 2023, Communications Minister Michelle Rowland announced A$10.5m in funding through the News Media Assistance Program to promote a diverse and sustainable media sector. The Australian Communications and Media Authority has received the funding to implement the Media Diversity Measurement Framework, which was developed through a public consultation.

Public broadcaster ABC continued its transition into a digital-first media organisation in 2023, announcing a series of proposals to further shift investment into digital services. The ABC Five-Year Plan (2023-2028) forecasts that by 2028 most of its audience engagement will come through its digital services. Newly appointed Chair, Kim Williams, said his priorities included securing better funding for the ABC and upholding its Charter responsibilities, including the requirement for impartiality.

Misinformation was abundant during the divisive Voice referendum campaign where Australians voted to reject a proposal to set up a formal body for Indigenous people to give advice on laws. There were widespread claims that the plan might lead to tax increases or that the Australian Electoral Commission would tamper with votes, revealing a deep distrust with the government. The 'no' campaign's main strategy was to instil fear and doubt, suggesting that the proposal didn't carry enough details. Seven in ten Australians subsequently expressed concern about the lies and misinformation on social media during the campaign.[116]

The media landscape is undergoing a significant shift as AI increasingly permeates newsrooms, prompting traditional outlets to reconsider their approach to the technology as the industry grapples with how to use it effectively and safely. News Corp Australia is producing 3,000 articles a week using artificial intelligence. The rise of AI use has led to widespread public concern. According to a report from media monitoring organisation Streem,[117] over half (57%) believe AI creates more problems than it solves. These concerns indicate a need for policy frameworks that balance the benefits of AI with the public interest.

Sora Park
News and Media Research Centre, University of Canberra

[115] https://news.nab.com.au/news/stream-less-spend-less-younger-aussies-hit-pause-on-subscriptions/
[116] B. Browne, 'Polling – Misinformation and the referendum'. The Australia Institute. https://australiainstitute.org.au/report/misinformation-and-the-referendum/
[117] https://www.themandarin.com.au/235452-report-state-of-australian-media-report/

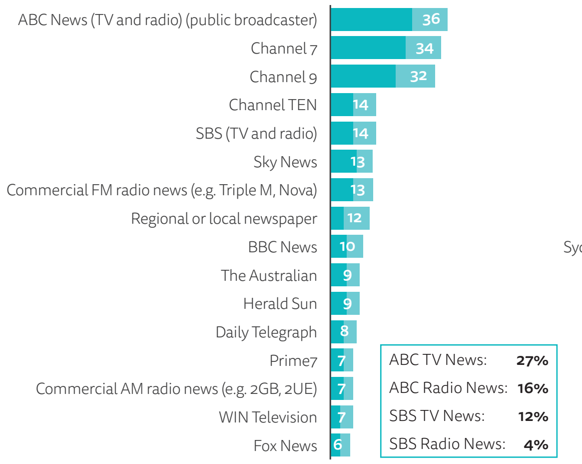
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

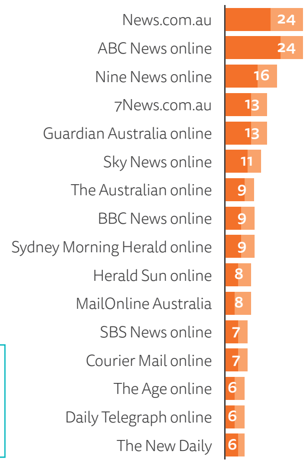
% Weekly usage

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

TV, RADIO, AND PRINT



ONLINE

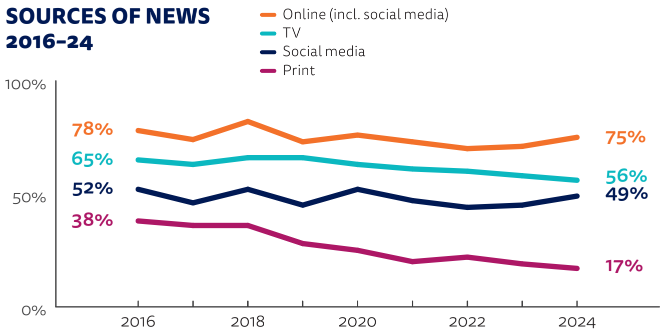


21% pay for **ONLINE NEWS**

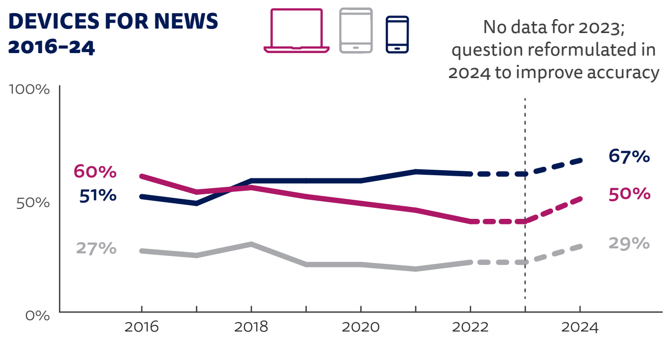
CHANGING MEDIA

TV and print news consumption continue to decline, while online and social media are becoming more significant. In line with this trend, Australians are increasingly accessing news across digital devices.

SOURCES OF NEWS 2016–24



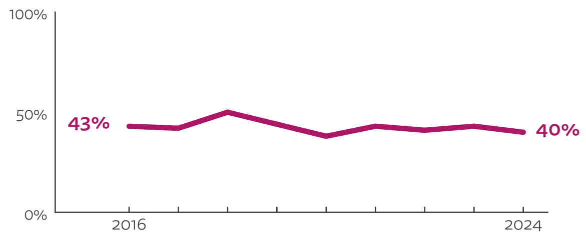
DEVICES FOR NEWS 2016–24



TRUST

Trust in news dropped this year by 3pp, reaching its lowest point since 2020. It has fallen the most amongst women. The top trust factors were 'high journalistic standards' (81%) and 'transparency' (80%). Public broadcasters such as ABC and SBS are the most trusted sources of news surveyed, along with regional and local newspapers.

OVERALL TRUST SCORE 2016–24



Proportion that trusts 'most news most of the time'

40% OVERALL TRUST 20/47 markets

REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 73.42	39/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
ABC News	64%	17%	19%
Australian Financial Review	54%	30%	15%
BBC News	59%	26%	15%
Channel 7 News	54%	23%	23%
Channel 9 News	55%	22%	24%
Daily Telegraph	42%	30%	29%
Guardian Australia	50%	31%	20%
Herald Sun	44%	29%	27%
News.com.au	48%	27%	26%
Regional or local newspaper	60%	27%	14%
SBS News	65%	21%	14%
Sky News	45%	23%	33%
Sydney Morning Herald	48%	29%	23%
The Age	48%	31%	21%
The Australian	50%	28%	22%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

40% listened to **PODCASTS** in the last month

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	32% (-)	66%
2	YouTube	26% (+3)	62%
3	Instagram	16% (+2)	43%
4	X (formerly Twitter)	10% (-2)	16%
5	Facebook Messenger	10% (+1)	51%
6	TikTok	9% (+1)	21%

Population	7.6m
Internet penetration	92%

HONG KONG

Fears for press freedom in Hong Kong have been heightened by the introduction of new national security provisions, containing tougher punishments for offenders. Meanwhile media organisations continue to struggle to adapt to rapidly changing audience consumption habits and significant declines in advertising revenue, resulting in financial losses and closures.

The repercussions of the earlier National Security Law (2020) continue to reverberate in Hong Kong as journalists navigate uncertainties and potential red lines that could lead to charges of 'secession', 'subversion', 'terrorism', and 'collusion with foreign organisations'. Based on a poll of its members, the Hong Kong Foreign Correspondents' Club (FCC) found that two-thirds (67%) of journalists already engaged in self-censorship in their writing through avoiding certain topics; almost three-quarters (73%) were concerned about the possibility of arrest or prosecution from their reporting or editing.[118] Many journalists have also left the profession. The number of members of the Hong Kong Journalists Association (HKJA) declined from 800 in 2019 to the present number of around 300.

These challenges to journalism in Hong Kong will likely intensify with the enactment of the Safeguarding National Security Bill. Known as 'Article 23', the bill comprises several laws prohibiting acts of treason, secession, sedition, and subversion. A previous attempt to pass these provisions was scrapped in 2003 after hundreds of thousands of people took to the streets in protest. This time, public criticism has been more muted. While such laws are relatively common in many democracies, observers note that the definition and scope of some of the offences were too broadly defined, leaving journalists worried that they could inadvertently be breaking laws from their news-gathering activities. As noted by the HKJA[119] and FCC[120] in their calls for the provision of a 'public interest defence' to the bill, journalists could be imprisoned for having knowledge of potentially treasonous activities and not disclosing them to the police.

One bright spot for press freedom in Hong Kong was the successful appeal by a Hong Kong journalist, Choy Yuk-ling, to the Court of Final Appeal against her conviction for 'knowingly making a false statement' when she accessed the Transport Department's vehicle registry database to identify the owner of a car as part of a TV documentary related to an incident during the 2019 Anti-Extradition protests. The database was routinely used by journalists in their investigative reporting, but there is no option for them to select 'journalism' as a reason for accessing it and hence they selected 'other traffic and transport related matters'. As part of its judgment, the court noted the fact that 'the appellant was exercising her freedom of speech and of the press in connection with investigating the events of 21 July 2019 should be taken into consideration'.[121] The TV documentary that Choy Yuk-ling produced, '7.21 Who Owns the Truth', was released under RTHK's long-running current affairs series *Hong Kong Connection*, and it eventually won several press awards. However, RTHK, which is funded by the government, declined to accept them.

Meanwhile, the shift from offline to online advertising continues unabated in Hong Kong, with adverse effects on the local media environment. The free newspaper *Sky Post* ceased publication of its print edition after 12 years, and even though it still offered an online edition, numerous journalists responsible for the day-to-day reporting were dismissed. In their heyday, printed newspapers were ubiquitous in Hong Kong as 90% of the population used public transportation and free newspapers were handed out at train stations and bus stops.

But increased digitalisation means that many newspapers ceased publication or have transitioned to online-only editions. This currently leaves *Headline Daily*, *AM 730*, and *Lion Rock Daily* as the remaining free printed Chinese-language newspapers, and *The Standard* as the only free printed English newspaper.

Despite significant audience reach for its news programmes, broadcaster TVB continues to suffer year-on-year financial losses as it struggles to attract advertisers. This has resulted in more staff cuts and the proposed reduction of free TV channels from five to four, which involves merging its news and finance information channel with a youth-orientated channel focusing on entertainment and lifestyle. YouTube has taken over from Facebook as the most popular social or video platform for accessing news, which partially reflects the trend of people paying attention to public affairs on the platform, including channels operated by commentators and activists who have emigrated overseas.

Michael Chan, **Francis Lee**, and **Hsuan-Ting Chen**
Chinese University of Hong Kong

[118] On Point: FCC Press Freedom Survey 2023. https://issuu.com/fcchk/docs/thecorrespondent_july_2023_online
[119] 'The Hong Kong Journalists Association to Lodge Submission to the Security Bureau on Basic Law Article 23 Legislation'. https://docs.google.com/document/d/1pPExqOsWHItFgT4EJGo8X4gCGI_tSA_AKMtsup3mY-0/edit?pli=1
[120] FCC Submission on the Consultation Document of Article 23 of the Basic Law. https://www.fcchk.org/fcc-submission-on-the-consultation-document-of-article-23-of-the-basic-law
[121] In the Court of Final Appeal of the Hong Kong Special Administrative Region Final Appeal no. 2 of 2023 (criminal). https://legalref.judiciary.hk/lrs/common/search/search_result_detail_frame.jsp?DIS=152985&QS=%2B%7C%28FACC%2C2%2F2023%29&TP=JU

WEEKLY REACH OFFLINE AND ONLINE

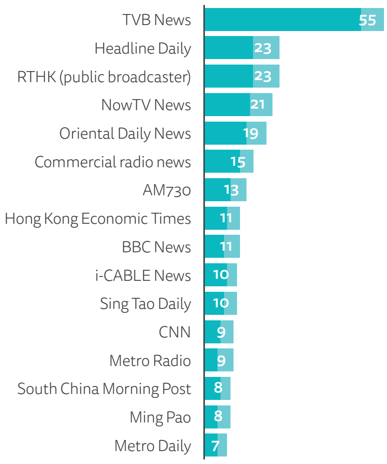
TOP BRANDS

% Weekly usage

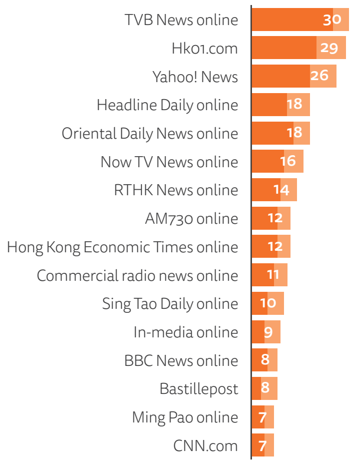
- **Weekly use** TV, radio & print
- **More than 3 days per week** TV, radio & print
- **Weekly use** online brands
- **More than 3 days per week** online brands

18% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



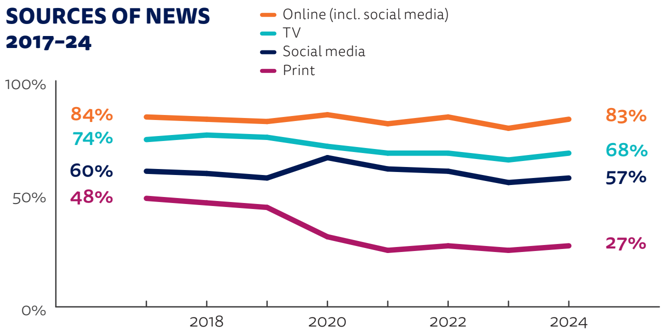
ONLINE



CHANGING MEDIA

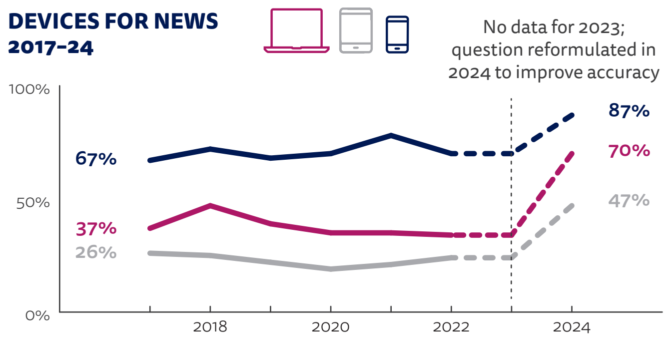
The trend of declining consumption of both TV news and news via social media has slowed down in recent years. Print consumption has fallen by more than 20pp since 2017 but has also stabilised.

SOURCES OF NEWS 2017–24



DEVICES FOR NEWS 2017–24

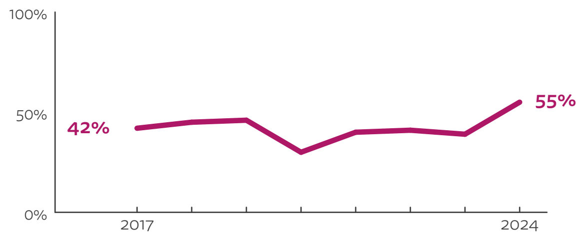
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in the news has increased substantially from 39% to 55%. All news brands included in the survey also registered increased brand trust scores, with percentages trusting the brands rising by 5% to 15%. The few digital-only news brands remain relatively less trusted when compared to the more conventional news brands.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

55% **OVERALL TRUST =7/47 markets**

REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 43.6	135/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
AM730	61%	28%	11%
Bastillepost	50%	30%	20%
Commercial radio	66%	25%	9%
Dot Dot News	51%	33%	17%
Headline Daily	66%	22%	13%
HK01	59%	26%	14%
i-CABLE News	62%	27%	11%
In-media	55%	29%	16%
Ming Pao	63%	26%	11%
NOW TV News	70%	21%	9%
Oriental Daily News	61%	24%	16%
RTHK (public broadcaster)	66%	20%	14%
Sing Tao Daily	63%	25%	12%
TVB News	64%	16%	19%
Yahoo! News	65%	26%	9%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

44% **SHARE NEWS** via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	YouTube	46% (+6)	74%
2	Facebook	42% (-2)	69%
3	WhatsApp	26% (-2)	70%
4	Instagram	19% (+2)	44%
5	WeChat	15% (+4)	45%
6	X (formerly Twitter)	8% (+1)	18%

Population	1,402m
Internet penetration	60%

INDIA

For much of the year India's media have been engaged in covering parliamentary elections, won by Prime Minister Narendra Modi's ruling alliance, albeit with a smaller majority than expected. The run-up to the elections saw a number of new laws passed, some replacing archaic legislation, which many fear may undermine press freedom in India.

Journalists and digital media groups have expressed concern about sweeping regulatory powers given to the government under the new laws. The Digital Personal Data Protection Act (DPDP) gives powers to government-appointed board members to implement its provisions. Critics point out that the law also lacks exemptions for journalists to access personal data for doing journalistic work that might be in the public interest.[122] A second law, the Press and Registration of Periodicals Act, replacing earlier colonial era legislation, aims to simplify the process of registration of periodicals. However, concerns have been raised about the unspecified powers given to the government to issue guidelines or make rules under the Act. A third new law, The Telecommunications Act 2023, was passed when many opposition members were under suspension in the Parliament and it has raised concerns over its broad definitions of telecommunication services, and about excessive powers for surveillance, internet shutdowns, and government access to encrypted social media messages.[123]

In March, the central government's plans to make its fact-check unit under the Ministry of Information and Broadcasting the core place to flag false information related to government business were put on hold by the Supreme Court. The Court noted that there were 'serious constitutional issues' related to the government's move, which many media bodies have said will affect freedom of speech and expression.

In a move to restore transparency in electoral funding, the Supreme Court of India also intervened to strike down electoral bonds, essentially anonymous ways of funding political parties. Noting it affected the voter's right to information, the court also directed the State Bank of India (SBI) to release information on electoral bonds purchased so far.[124] This ruling provided opportunities for digital platforms such as NewsLaundry and The News Minute to collaborate on investigative stories to cast light on the electoral funding of political parties in the country.

This year's Digital News Report survey shows declining trust for some news brands, at a time when the mainstream Indian media have also faced criticism for their coverage of the violence in the state of Manipur. The national and regional media's coverage of the tensions between the ethnic Kuki and Meitei communities in May last year was found lacking context and balance. But concerns were also expressed about widespread misinformation via WhatsApp and other social media, which was fuelling tensions. The internet ban imposed by the government to control the situation adversely affected free flow of information for reporters within the region and alienated the rest of the country from crucial developments, a fact-finding report by the Editors' Guild of India noted.[125]

These developments highlight the widespread use of different social media and messaging apps for news in India. Our survey respondents reflect, in some measure, a new generation of Indians whose main source of news is often via social media platforms. Almost half of respondents use YouTube (54%) and WhatsApp (48%) for news each week, while Facebook and X are becoming less popular.

However, legacy platforms such as NDTV, *Times of India*, Republic TV, and BBC News continue to enjoy high viewership in their offline and online products, among our younger, urban, mostly English-speaking sample. Despite a general decline in interest in news over the years, print (40%) and TV (46%) remain popular platforms for respondents to access news, especially during this crucial election year.

After taking control of NDTV, AMG Media Networks, which is part of the powerful business conglomerate Adani Enterprises Ltd., has increased its stake in the news agency Indo-Asian News Service (IANS) and more recently in the company that runs the digital financial news platform BQ Prime. The Adani Group's expansion within the media landscape reflects the increasing corporatisation of media in India.[126]

In October, the offices and residences of employees and journalists associated with the bilingual digital news portal NewsClick were raided by the Special Cell of the Delhi Police. The raids followed previous surveys and investigations by the Enforcement Directorate, Income Tax Department, and other government agencies over alleged foreign funding received by the news organisation.[127] Journalists' unions and several independent press bodies have criticised the actions of the government agencies, which involved seizure of devices, and the use of terrorism charges against NewsClick as 'chilling' and an effort to muzzle press freedom.

Anjana Krishnan
Research Associate, Asian College of Journalism, Chennai

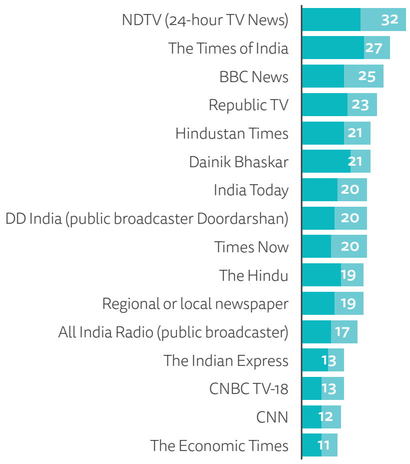
122 https://editorsguild.in/statements-issued/
123 https://thewire.in/government/telecom-broadcasting-data-protection-bill-digipub
124 https://www.thehindu.com/news/national/electoral-bonds-scheme-unconstitutional-sbi-should-reveal-the-details-of-donors-rules-sc/article67848211.ece
125 https://editorsguild.in/wp-content/uploads/2023/09/EGI-report-on-Manipur.pdf
126 https://economictimes.indiatimes.com/industry/media/entertainment/adani-buys-remaining-51-stake-in-bq-publisher-quintillion-business-media/articleshow/104911115.cms?from=mdr
127 https://economictimes.indiatimes.com/news/india/journalist-bodies-condemn-raid-on-newsclick-call-it-attempt-to-muzzle-the-press/articleshow/104140331.cms?from=mdr

WEEKLY REACH OFFLINE AND ONLINE

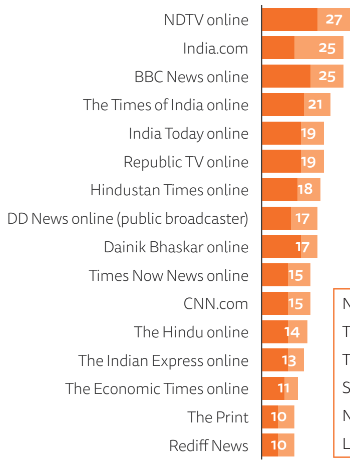
TOP BRANDS
% Weekly usage

- 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

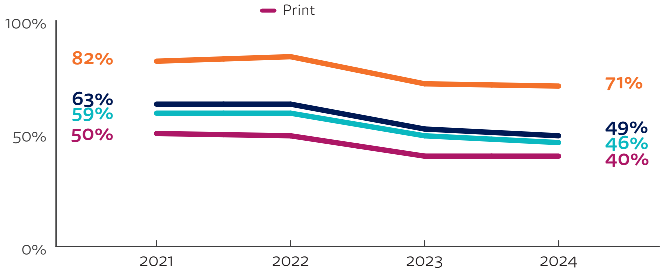


NewsClick:	10%
The Wire:	9%
The Quint:	9%
Scroll.in:	8%
Newslaundry:	7%
Livemint:	6%

METHODOLOGY NOTE

These data are based on a survey of mainly English-speaking, online news users in India – a small subset of a larger, more diverse, media market. Findings in this online poll are not nationally representative and will tend to under-represent the continued importance of traditional media such as TV and print.

SOURCES OF NEWS 2021–24



DEVICES FOR NEWS

Computer **61%**

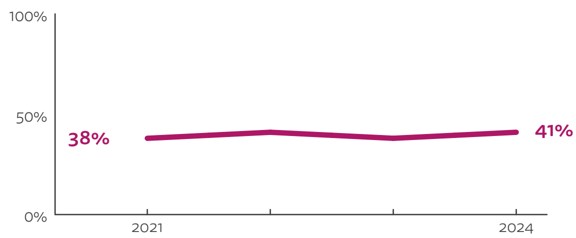
Smartphone **79%**

Tablet **44%**

TRUST

Overall trust in news increased slightly in this election year (41%). Among those included in our survey, large legacy media brands tend to retain the highest levels of trust, including public broadcasters like the BBC and All Indian Radio. Partisan commercial broadcasters and independent digital portals who are either uncritical or extremely critical of those in positions of power are actively distrusted by the respondents. As always, scores should not be seen as a measure of the quality or trustworthiness of the content itself.

OVERALL TRUST SCORE 2021–24



Proportion that trusts 'most news most of the time'

41%
OVERALL TRUST =18/47 markets

REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 31.28	159/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
All India Radio	65%	15%	20%
BBC News	65%	14%	21%
CNN	59%	18%	22%
DD News	64%	15%	21%
Economic Times	65%	17%	19%
Hindustan Times	65%	16%	19%
India Today	63%	16%	21%
NDTV	63%	16%	21%
Regional or local newspaper	61%	18%	21%
Republic TV	57%	17%	26%
Scroll.in	49%	22%	29%
The Hindu	63%	17%	20%
The Indian Express	66%	16%	18%
The Times of India	71%	13%	16%
The Wire	51%	21%	28%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

45%
SHARE NEWS via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	YouTube	54% (-2)	71%
2	WhatsApp	48% (+1)	71%
3	Facebook	35% (-4)	50%
4	Instagram	33% (+1)	54%
5	Telegram	20% (-)	38%
6	X (formerly Twitter)	13% (-7)	21%

Population	278m
Internet penetration	76%

INDONESIA

As the world's third largest democracy geared up for the 2024 general elections, the use of social media as a source of news continued to outpace print and TV. The 14 February election of Indonesian Defence Minister and former Kopassus (Special Forces) head Prabowo Subianto, along with the looming implementation of a new Criminal Code, raised fears of both illiberal populism and democratic backsliding.

In an election in which voters born after 1980 made up 56.5% of the electorate, the campaigns of all three presidential contenders made unprecedented use of TikTok and other social media. Yet it was the victor, Prabowo Subianto, whose videos utilised an AI-generated image of him as a *gemoy*, or cute and charming grandpa, that attracted the most attention.

The tactics were quite different from his previous campaigns of 2014 and 2019, which were marked by hyper-masculine right-wing nationalist and Islamist appeals. Instead, the round-cheeked, dancing grandpa of the 2024 campaign was presumed to be more appealing not only to women, but also to younger Indonesian voters who didn't know of either his alleged history of human rights violations in Timor Leste, Papua, and Aceh, or his role in the 'disappearing' of human rights activists in the waning days of the Soeharto regime. Of the legacy media, only *Tempo* and *The Jakarta Post* regularly reminded readers of the former general's activities during these years, or that he had been discharged from the army in 1998 for breaking the law, violating human rights, and disobeying orders.

Retirement is early in Indonesia – 58 in 2023 – and a cohort of industry leaders who were working during the fall of Soeharto are now retired or retiring, leading to a sea change in newsroom leaderships along with new experiences and memories. Although there were no major closures of media outlets in 2023, Indonesian media continued to suffer a loss of advertising revenue and the rise of online shopping sites such as Shopee and Tokopedia has contributed to the challenges faced by traditional media.

Meanwhile, the new Criminal Code, which includes bans on insulting the president, the vice-president, state institutions, the flag, and the state ideology known as Pancasila, was one year closer to being implemented. Decades in the making, the new code will replace the existing law, which was enacted in 1946 and is a carry-over from the Dutch colonial period. The Indonesian Press Council has noted that the new law, which will come into effect after a three-year waiting period, has 17 articles that have the capacity to threaten press freedom.

The past few years have witnessed other disturbing encroachments on digital expression. The 2008 Electronic Information and Transactions Law contains criminal penalties for those found guilty of distributing, transmitting, and making electronic information containing libel accessible to the public. Although the law was intended to regulate e-commerce, it contains a number of vague and imprecise offences with penalties including arrest and detention. Any kind of electronic communication – including social media – is fair game under the law, as are all manner of 'insults', including blasphemy.

Similarly, Ministerial Regulation 5 (MR5), which was introduced in late November 2020 and governs the functioning of private electronic systems operators (ESOs), affects Indonesian services and platforms as well as multinational companies such as Facebook, X, Google, TikTok, and others. Granting the government authority to regulate private ESO activity, MR5 gives authorities access to user data and provides for sweeping notice and takedown orders.

Social media sites such as WhatsApp, YouTube, Facebook, and Instagram are extremely popular among users in Indonesia: 60% of Indonesians report getting their news from social media platforms. Of these, TikTok in particular gained in popularity as a source for news, jumping 7 percentage points from 22 to 29%. WhatsApp continued to dominate as the overall social media platform for any use.

Because of the popularity of social media as a source of news, much attention has been directed to its role in spreading disinformation, political propaganda, 'hoaxes', and hate speech. COVID-19 led to a flood of misinformation, and the presidential election likewise raised widespread concern about the use of automated accounts and paid commentators, locally known as 'buzzers', to promote various political interests.

However, the 2024 election was less about disinformation than it was about what Nicole Curato has described as 'erasing history through good vibes and toxic positivity'.[128] As Ross Tapsell has observed, the *gemoy* images of Prabowo were part of 'a fake campaign without fake news', in which 'AI was used to sanitise discourse rather than muddy it'.[129]

Janet Steele
Professor of Media and Public Affairs and International Affairs, George Washington University

[128] https://th.boell.org/en/2022/03/28/philippines-good-vibes-toxic-positivity
[129] https://www.cigionline.org/articles/its-time-to-reframe-disinformation-indonesias-elections-show-why/

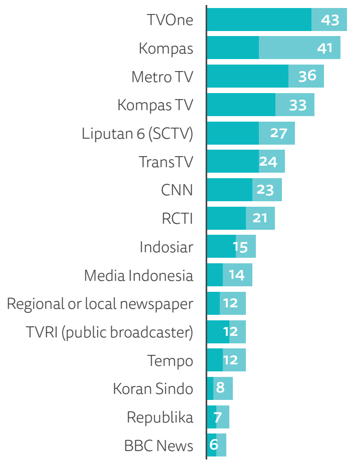
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

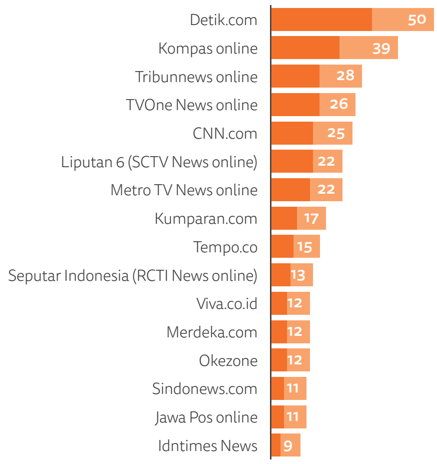
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

16% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



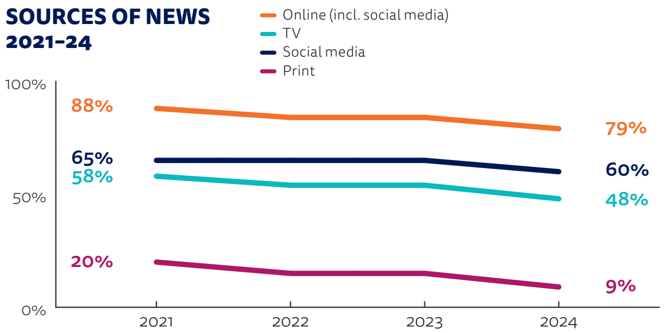
ONLINE



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 most important for the millions of people who are not online.

SOURCES OF NEWS 2021–24



DEVICES FOR NEWS

Computer **53%**

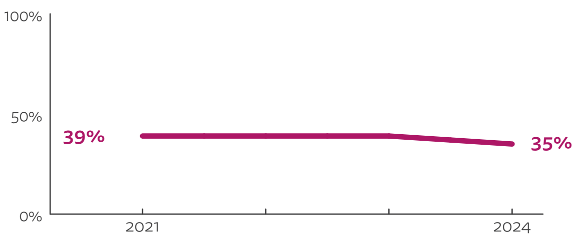
Smartphone **84%**

Tablet **35%**

TRUST

Overall trust in news dipped by 4 percentage points this year, having been stable since 2021. Falling trust is often associated with election cycles as contentious issues are aired more frequently in the news media. Trust in all of the individual brands for which data exist declined, with the top three, *Kompas* (-8pp), CNN (-8pp), and TVRI (-5pp) declining the most.

OVERALL TRUST SCORE 2021–24



Proportion that trusts 'most news most of the time'

35% **OVERALL TRUST** **=26/47 markets**

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
CNN	60%	33%	8%
Detik.com	58%	36%	6%
Jawa Pos	50%	44%	6%
Kompas	61%	33%	6%
Kumparan.com	47%	45%	8%
Local television news	54%	39%	7%
Merdeka.com	49%	44%	7%
RCTI	53%	37%	10%
SCTV (Liputan6)	58%	35%	7%
Sindonews.com	46%	44%	9%
Suara.com	45%	48%	7%
Tempo	57%	36%	7%
Tribunnews	51%	41%	8%
TVOne	58%	32%	10%
TVRI	61%	34%	5%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

REPORTERS WITHOUT BORDERS – WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 51.15	111/180

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

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	WhatsApp	46% (-5)	72%
2	YouTube	41% (-7)	65%
3	Facebook	35% (-3)	52%

Rank	Brand	For News	For All
4	Instagram	29% (-8)	49%
5	TikTok	29% (+7)	44%
6	X (formerly Twitter)	12% (-9)	20%

Population	127m
Internet penetration	93%

JAPAN

The Japanese media scene is characterised by lively competition between public and commercial broadcasters and an influential newspaper sector where some dailies still sell millions of print copies. Online news is mainly accessed via free portals and aggregators such as Yahoo! and Line News. Social media use tends to be lower than in other countries, with YouTube the dominant video network.

Japan's historically high newspaper circulation continued to decline to a total of 28.5 million in March 2023, down by 7.31% from the previous year. With the Japanese yen at weak levels, prices of paper and ink made from mostly imported materials have hit the sector hard. Five national dailies, four of which still have seven-digit print circulation, are struggling to develop digital business models fast enough to make up for shrinking print revenues. One exception is *Nikkei* (Japan Economic Daily), which recently reached 1 million digital subscribers and has been pushing hard into the corporate sector as well as chasing the next generation of readers. A new premium service (Nikkei Prime) includes specialist content on technology, automobiles, and green business transformation. Minutes by Nikkei, launched in November 2023, is a product aimed at briefing young readers in a concise way. The leading business publisher, which also owns the *Financial Times*, now has the fifth largest digital subscriber base in the world and the largest in non-English media. By contrast, another early adopter, *Asahi Shimbun*, has achieved only around 300,000 digital subscribers over a similar time period. Conservative national daily *Yomiuri*, which at 6 million has the largest print circulation, has started to invest more in digital development while maintaining its strategy of only allowing digital access to print subscribers.

Japan's competitive national and local broadcasters are also facing the impact of changing audience viewing habits. As of March 2023, more than half of households (52.7%) subscribe to at least one TV streaming service, and the majority use YouTube.[130] Tver, a free catch-up (VOD) service operated by the main commercial broadcasters, is increasing its viewing figures but is not yet consistently profitable.[131] The scope and remit of public broadcaster in the digital age has also been discussed, with amendments to the Broadcasting Act tabled in March 2023 to change NHK's internet remit, currently defined as 'complementary business to broadcasting', to 'essential business'. This will now cover streaming and catch-up TV, though savings will be needed as the receiving fee was cut by 10% from 2023. However, concerns about the 'crowding out' of commercial media persist, with new services still requiring 'public interest tests'.

NHK has often been the first in Japan to adopt new technologies and introduced an AI newsreader back in 2018, an animated character named 'News Yomiko', designed by a manga artist. Now several commercial broadcasters have followed suit, hoping to cut production costs. *Nikkei* has also been using AI to help summarise corporate results, but deeper analysis is still done by humans.

Following the massive earthquake on New Year's Day in north-western Japan a number of false claims went viral on social media. These included suspicious rescue requests from places that do not exist and suggestions that the earthquake was man-made, prompting the government to issue a request to the main online platforms to take appropriate action. LINE Yahoo, the owner of Yahoo! News, which over half (53%) cite as their main source of online news, deleted over 1,800 posts mainly related to the earthquake. To meet the increasing challenge of disinformation, the news media, advertising agencies, and platform companies in Japan have jointly developed a technology to identify and verify the source of content as well as other information related to its credibility, using a digital watermark.[132] The Originator Profile Collaborative Innovation Partnership aims to be in use by 2025.

Yahoo! News came under the spotlight in September 2023 when Japan's Fair Trade Commission (FTC) warned that it might be in breach of Anti-Monopoly Law if rates paid for using publisher articles were too low. It urged Yahoo!, along with other news portals, to 'disclose as much information as possible' about how licence fees and advertising arrangements are decided, to enable publishers and others to review whether they are paid fairly. The report also published their own research findings which showed that, on average, publishers receive 124 yen (less than US$1) per 1,000 page views (PVs), less than a quarter (24%) of the ad revenue earned by the portals. The regulator suggested there should be proper negotiation between the two parties.

Yasuomi Sawa
Journalist and Professor of Journalism, Waseda University
Reiko Saisho
NHK, Broadcasting Culture Research Institute

130 https://minpo.online/article/-part-2.html
131 https://catr.jp/companies/5a3aa/30771
132 https://wan-ifra.org/2023/09/originator-profile-cross-industry-project-aims-for-safer-cyberspace/

WEEKLY REACH OFFLINE AND ONLINE

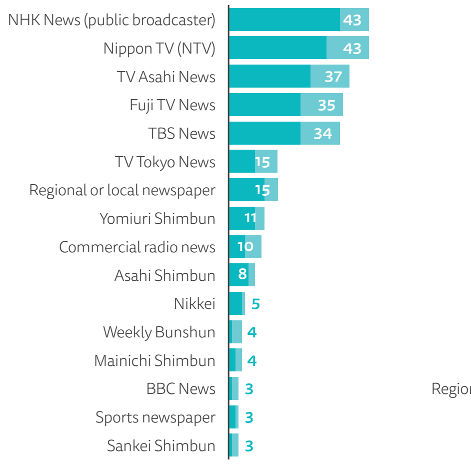
TOP BRANDS

% Weekly usage

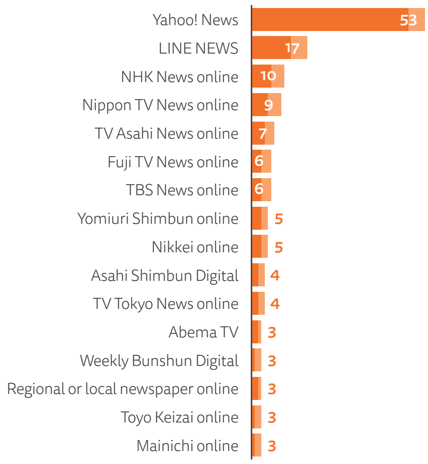
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

9% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



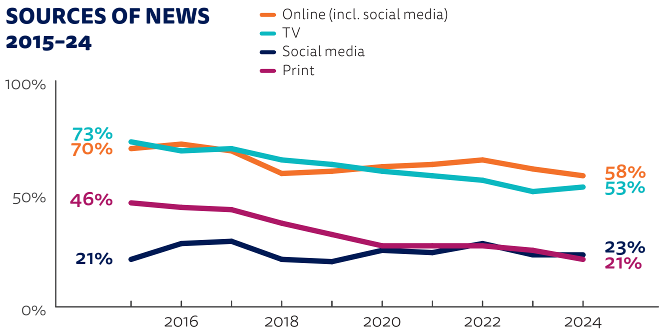
ONLINE



CHANGING MEDIA

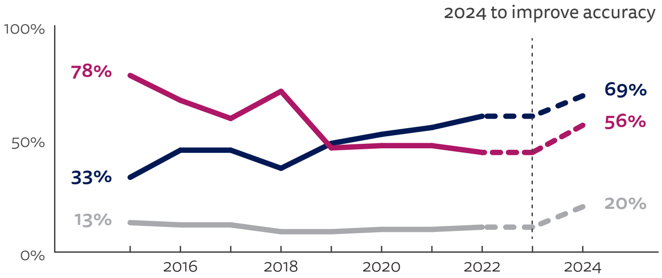
In Japan's ageing society, where over-65s make up almost a third (29%) of the population, older people still cling to TV and print, but younger groups mainly get news from online aggregators and social and video networks, such as YouTube and Line.

SOURCES OF NEWS 2015–24



DEVICES FOR NEWS 2015–24*

No data for 2023; question reformulated in 2024 to improve accuracy

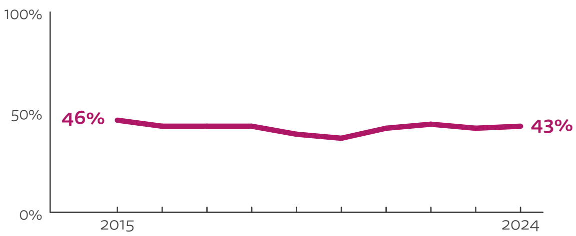


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Overall trust levels remain stable, while the scores for individual news brands declined by between 2 and 6 percentage points. Major media outlets have been posed tough questions as to why it took so long to investigate long-swirling rumours of large-scale sexual abuse of male stars by the late idol impresario Johnny Kitagawa. It took an investigation by a non-Japanese media company, the BBC, to force the matter into the open.

OVERALL TRUST SCORE 2015–24



Proportion that trusts 'most news most of the time'

43% OVERALL TRUST =15/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Asahi Shimbun	44%	36%	20%
Fuji TV News	49%	36%	15%
Local newspaper	50%	39%	11%
Mainichi Shimbun	43%	41%	17%
NHK News	59%	28%	13%
Nikkei	50%	38%	12%
Nippon TV News	52%	35%	12%
Sankei Shimbun	42%	43%	15%
TBS News	51%	35%	15%
TV Asahi News	51%	33%	16%
TV Tokyo News	48%	40%	12%
Weekly Bunshun	26%	39%	35%
Weekly Shincho	25%	46%	29%
Yahoo! News	47%	37%	15%
Yomiuri Shimbun	47%	40%	14%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF REPORTERS WITHOUT BORDERS | **WORLD PRESS FREEDOM INDEX SCORE 2024** | Score: **62.12** | **70**/180

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

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	YouTube	28% (+2)	59%
2	Line	19% (+6)	50%
3	X (formerly Twitter)	17% (+1)	32%
4	TikTok	5% (+2)	14%
5	Instagram	5% (+1)	22%
6	Facebook	4% (-)	12%

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

Population	33m
Internet penetration	94%

MALAYSIA

The uncertainties faced by the Malaysian media industry continued into 2024 with at least two online news portals closing temporarily and industry leader, satellite pay-TV operator Astro Awani, suffering significant losses. The wider environment has not been very supportive either, with the constantly pressured Unity coalition government of Prime Minister Anwar Ibrahim imposing greater controls on Malaysia's media.

This Unity government was cobbled together after the general election of November 2022. Many were cautiously hopeful that the fragile political and economic environment that had troubled many Malaysians since the coup of 2020 would finally be stabilised. Eighteen months into its five-year tenure, however, the many reforms that had been proposed have not been carried out and the uncertainties prevail.

In this environment, Malaysia's media have undergone a tough year. Astro, for example, posted a net loss of almost US$10m for the third quarter of 2023, after paying one-off costs linked to a 20% reduction of its headcount as well as foreign exchange losses.[133] In November last year, some streamlining of Malaysia's news portal environment was anticipated when the three-year-old news portal, The Vibes, acquired the much older The Malaysian Insight (TMI). But by February this year both halted operations, reportedly due to their inability to pay employees' wages.[134] Both have since reopened, but the question of how long this will go on remains.

Consumption of traditional media sources such as television news and print has been declining for several years, with weekly use of print newspapers having halved since 2017. Online and social media have become a convenient alternative with Facebook, WhatsApp, YouTube, and TikTok becoming important sources of news. Our Digital News Report data show TikTok has grown by 7 percentage points in the last year while Facebook news use has declined by a roughly similar percentage.

Ongoing actions taken by the government to control the media illustrate a low level of tolerance despite promises of a freer environment. Just in the first three months of 2024, the government referred more than 51,000 cases of 'harmful social media content' to Meta and TikTok for further action. These cases were reportedly related to the now-infamous and taboo '3Rs' – race, religion, and royalty. Race and religion are sensitive issues in Malaysia, which has a mainly Muslim ethnic Malay majority, alongside significant ethnic Chinese and Indian minorities. It also has laws prohibiting seditious remarks or insults against its monarchy.[135] A joint statement by the government media monitoring body, the Malaysian Communications and Multimedia Commission (MCMC), and the police stated that 'TikTok and Meta have been required to provide an improvement plan and strategy with comprehensive details as agreed in the meeting'.[136]

One potentially positive ongoing development has been the numerous open discussions held between the government and media professionals, academics, and civil society regarding the formation of a self-regulated Malaysian Media Council to promote, protect, and defend media freedom in Malaysia. It is anticipated that the Media Council Bill will be tabled in Parliament in June this year. A few months earlier, however, the Malaysian government reduced the validity period of media accreditation cards for online journalists. These cards, issued by a government agency, JaPen, make it easier for journalists to attend and report official government events.

It is evident from these contradictory developments that a government initially promising free speech as part of a slew of reforms is still smarting from the rise – and apparent success – of right-wing religious rhetoric online during the 2022 general elections. The elections saw the Islamist party, the Pan-Malaysian Islamic Party (PAS) making major inroads in middle/urban Malaysia, winning the largest number of parliamentary seats (43 of a total of 222 seats) after successfully campaigning using social media, especially TikTok. It was a campaign largely based on hate and exclusion, pitting one dominant religion against other minority religions, one major ethnic group – supposedly under siege – against so-called 'immigrants' (*pendatang*). There was nothing novel about the nature and content of the campaign. Race and religion have been the main ingredients of Malaysian politics for many decades. What is, however, novel and attractive for many – and continues to worry the government and even civil society – is the use of social media to divide the country further.

Zaharom Nain
University of Nottingham in Malaysia

133 Sulhi Khalid, 'Astro Posts its First Quarterly Net Loss as VSS Costs Weigh.' 2023. https://theedgemalaysia.com/node/693948
134 R. Loheswar, 'Report: News Outfit "The Malaysian Insight" Halts Operation "Indefinitely" amid Unpaid Wages.' 22 Jan. 2024. https://www.malaymail.com/news/malaysia/2024/01/22/report-news-outfit-the-malaysian-insight-halts-operation-indefinitely-amid-unpaid-wages/113918
135 Reuters, 'Malaysia Reports Increase in Requests to Restrict Social Media Content.' 9 Apr. 2024. https://www.reuters.com/technology/malaysia-reports-increase-requests-restrict-social-media-content-2024-04-09/
136 Sebastian Strangio, 'Malaysia Orders Meta, TikTok to Formulate Plan for "Harmful' Content"'. Apr. 2024. https://thediplomat.com/2024/04/malaysia-orders-meta-tiktok-to-formulate-plan-for-harmful-content/

WEEKLY REACH OFFLINE AND ONLINE

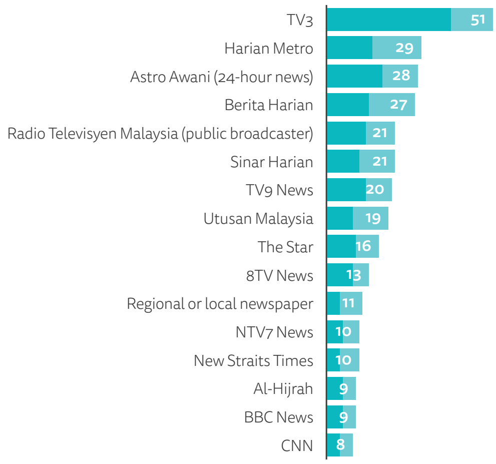
TOP BRANDS

% Weekly usage

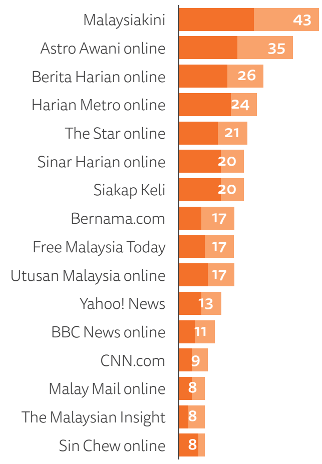
- **Weekly use** TV, radio & print
- **More than 3 days per week** TV, radio & print
- **Weekly use** online brands
- **More than 3 days per week** online brands

21% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



ONLINE

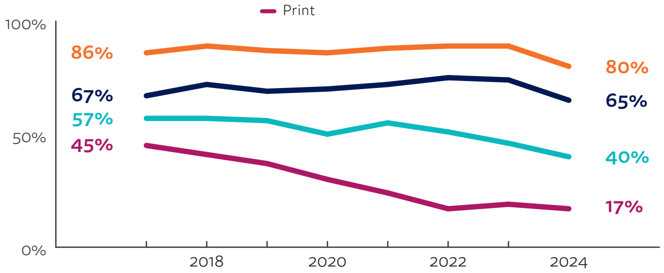


METHODOLOGY NOTE

We introduced education quotas for the first time in Malaysia as part of our programme to make data more representative of national populations. For example, the chart below shows a significant drop in all sources of news this year. Some of this drop will be related to the fact that there are more people with lower levels of education in our sample now, who typically have lower interest in news.

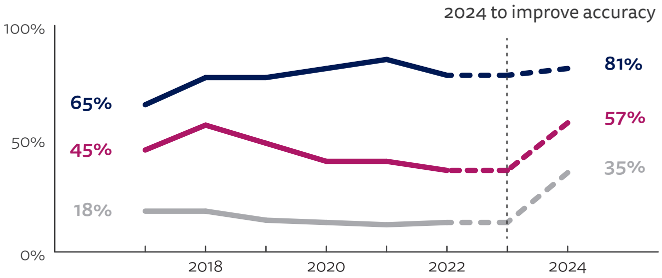
SOURCES OF NEWS 2017–24

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



DEVICES FOR NEWS 2017–24

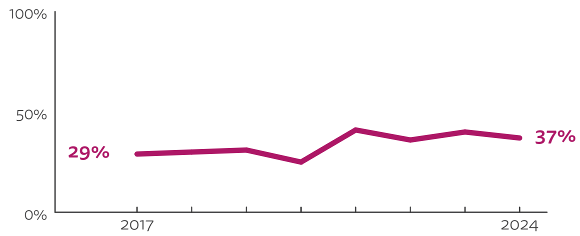
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

After a sharp 16% rise in trust to 41% in 2021, possibly linked to the COVID-19 lockdowns and greater dependence on media reports during the pandemic, the figure has hovered below that level over the past four years. Broadcast brands tend to have higher levels of trust, with many politically aligned national-language and vernacular newspapers often having lower public trust scores.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

37% OVERALL TRUST =23/47 markets

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2024** Score: **52.7** **107**/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Astro Awani	64%	23%	13%
Berita Harian	60%	25%	15%
Free Malaysia Today	53%	30%	17%
Harian Metro	58%	27%	15%
Malaysiakini	60%	25%	15%
Radio Televisyen Malaysia	63%	24%	14%
Regional or local newspaper	58%	31%	11%
Sin Chew Daily	49%	33%	18%
Sinar Harian	58%	27%	15%
The Malaysian Insight	52%	32%	16%
The Star	58%	28%	14%
TV3 News	60%	25%	16%
TV9 News	60%	27%	13%
Utusan Malaysia	57%	26%	16%
Yahoo! News	51%	32%	17%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

43% **SHARE NEWS** via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	43% (-8)	60%
2	WhatsApp	42% (-3)	68%
3	YouTube	38% (+1)	62%
4	TikTok	31% (+7)	46%
5	Instagram	21% (-3)	38%
6	Telegram	16% (-1)	33%

Population	112m
Internet penetration	91%

PHILIPPINES

The Philippine news media landscape has seen significant changes over the past year, especially in private broadcasting, which is experiencing a continuing decline in viewership. Concerns over press freedom persist, highlighted by the United Nations special rapporteur's alarm over ongoing attacks on journalists and activists.

The ownership and operation of several private broadcasters were caught in a state of flux marked by financial losses and closures, emergence of new partnerships, and government flexing its regulatory powers. In one of the most significant developments, Swara Sug Media Corp, which operates the far-right, religious-run Sonshine Media Network International (SMNI), is at risk of losing its 25-year congressional franchise due to accusations of misinformation, 'red-tagging' (labelling individuals or groups as communists or terrorists), and failing to inform Congress of major corporate changes. A House bill seeking to revoke its franchise, due to expire in 2044, awaits Senate approval.

Earlier, the National Telecommunications Commission (NTC) indefinitely suspended SMNI's operations at the House's behest, although it remains active on social media.[137] SMNI is owned by religious leader Apollo Quiboloy, a friend and ally of former president Rodrigo Duterte whom he engaged to broadcast a weekly show. In December the show was suspended by the Movie and Television Review and Classification Board over alleged death threats and vulgar language, alongside another programme accused of falsely reporting on the Speaker's travel expenses.

Nine Media Corp's staggering financial losses led it to shut down CNN Philippines in January. However, a partnership with TV5 Network, owned by business magnate Manuel V. Pangilinan, allowed for the launch of RPTV on the same frequency, expanding Pangilinan's MediaQuest Holdings, which encompasses TV5, Cignal TV (One PH), *BusinessWorld*, and *The Philippine Star*.

When the country's largest broadcast network, ABS-CBN, failed to get Congress to renew its franchise in 2020, it was forced to take its primetime newscast, *TV Patrol*, off its long-held free-to-air frequency, Channel 2, but kept running the service on its own cable channel and on A2Z through a partnership with the evangelical church-owned Zoe Broadcasting. *TV Patrol* in mid-April began simulcasting on its old frequency, thanks to a partnership with business tycoon and former Senate President Manuel Villar's ALLTV, Advanced Media Broadcasting System, which now occupies ABS-CBN's old frequency.

Months earlier, ABS-CBN's TeleRadyo returned to its old AM band as the rebranded TeleRadyo Serbisyo Radyo 630 as the network forged a joint venture with Prime Media Holdings associated with the family of Speaker Martin Romualdez. The partnership has broadened Romualdezes' footprint in the industry, which includes the Journal Group, Manila Standard, FM Radio Philippines, and the regional television network PRTV.

The leading network, GMA Network, introduced AI sportscasters Marco and Maia in keeping with its 'commitment to innovation in journalism'. The move sparked discussions on the use of AI in media, including the necessity and limitations of AI-generated presenters in a field packed with energy and emotion. GMA's former Digital Media head and Nieman fellow Jaemark Tordecilla, meanwhile, created a custom AI assistant that summarises government audit reports to assist investigative reporting.[138] Rappler has added AI summarisation features to its website and also unveiled Rappler Communities, a 'digital town square' for web and mobile that combines AI and human moderation to create safe spaces to discuss a wide range of subjects, from governance to travel.

During her visit to Manila, UN Special Rapporteur on Freedom of Opinion and Expression, Irene Khan, noted that the government of President Ferdinand Marcos Jr. was 'more amiable' toward the media than the previous Duterte administration, but expressed concerns over the red-tagging of journalists, misuse of libel laws against the media, a state order blocking the websites of alternative media platforms Bulatlat and Pinoy Weekly, failure to renew ABS-CBN's franchise, and the inadequacy of a governmental task force in protecting journalists.[139]

As of January, the National Union of Journalists of the Philippines documented 109 incidents of attacks and threats against journalists during the Marcos presidency, 47% higher over the same period than during Duterte's time. Rappler cofounder and Nobel Peace Laureate Maria Ressa's appeal of her cyber libel conviction remains pending before the Supreme Court, to which Khan has been admitted as an *amicus curiae*.

Philippine journalists, however, received a piece of good news days after World Press Freedom Day when a court convicted the gunman in the 2022 killing of broadcaster Percy Lapid. The mastermind, a former prisons chief, remains at large. The media, meanwhile, have stepped up self-policing efforts, setting up nine media-citizen councils under the aegis of the Philippines Press Institute (PPI).

Yvonne T. Chua
University of the Philippines

[137] Last year's survey showed SMNI's online arm as a source of news for 12% of Filipino respondents. The network was not included in this year's survey.
[138] https://reutersinstitute.politics.ox.ac.uk/news/i-created-ai-tool-help-investigative-journalists-find-stories-audit-reports-heres-how-i-did-it
[139] https://www.ohchr.org/sites/default/files/documents/issues/expression/statements/20240202-eom-philipines-sr-freedex.pdf

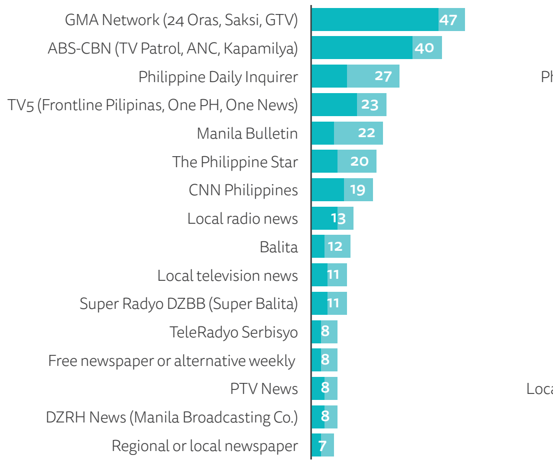
WEEKLY REACH OFFLINE AND ONLINE

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

18% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT

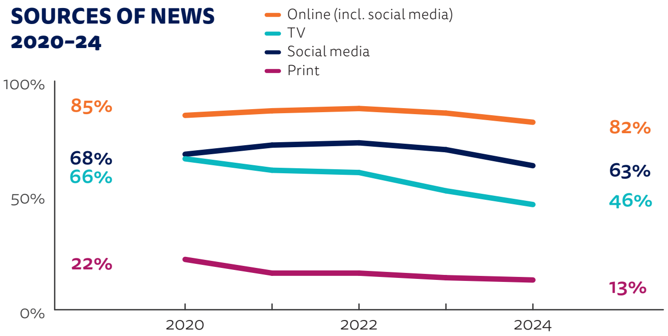


ONLINE

CHANGING MEDIA

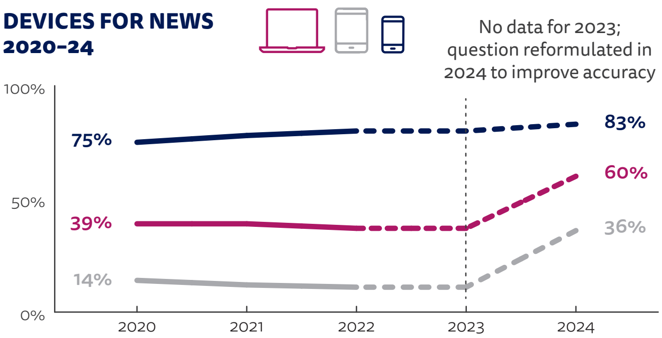
Online and social media remain the most popular sources of news in the Philippines with our more urban sample. TV and radio news is important for those who are not online, but reach has declined over the last five years.

SOURCES OF NEWS 2020–24



DEVICES FOR NEWS 2020–24

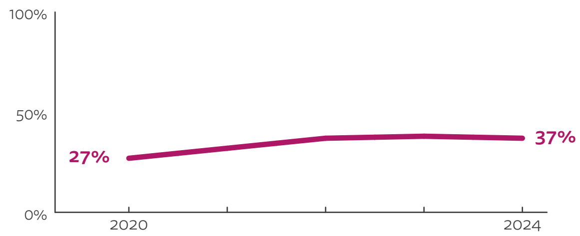
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Overall trust in news has remained stable since 2022. Many of the longest established media brands such as GMA Network and the *Philippine Daily Inquirer* have relatively high levels of trust, but some independent outlets respected for their reporting on those in positions of power are often actively distrusted by supporters of the politicians in question and subject to coordinated harassment. As always, public trust is not in itself a measure of the quality or trustworthiness of the content.

OVERALL TRUST SCORE 2020–24



Proportion that trusts 'most news most of the time'

37% **OVERALL TRUST =23/47 markets**

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 43.36	134/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Abante/Abante Tonight	49%	35%	16%
ABS-CBN	64%	23%	14%
DZRH	64%	27%	9%
GMA Network	72%	20%	8%
Manila Bulletin	65%	25%	10%
Philippine Daily Inquirer	66%	23%	11%
PTV	58%	29%	13%
Radyo Pilipinas	59%	30%	11%
Rappler	46%	26%	28%
Regional or local newspaper	60%	30%	11%
SunStar	53%	35%	12%
Super Radyo DZBB (Super Balita)	65%	26%	9%
TeleRadyo	60%	29%	10%
The Philippine Star	65%	25%	10%
TV5	67%	25%	9%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

42% **SHARE NEWS** via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	61% (-11)	74%
2	YouTube	45% (-10)	67%
3	Facebook Messenger	26% (-7)	53%
4	TikTok	23% (+2)	41%
5	Instagram	12% (-2)	30%
6	X (formerly Twitter)	9% (-7)	17%

Population	5.9m
Internet penetration	92%

SINGAPORE

Singapore's media industry remains tightly regulated, with an intricate system of laws in place covering mainstream, digital, and social media. Independent and alternative websites, as well as people posting on social media, now deal with 'correction orders' under the country's strict 'anti-fake news' laws.

With mainstream media already closely regulated, the authorities have been increasingly paying attention to what is said on social media, which is widely used by Singaporeans to discuss and share news. While WhatsApp (34%), Facebook (32%), and YouTube (28%) are the most used networks, the authorities have been paying particular attention to Instagram (20%) and TikTok, the fastest growing network for news at 15% (+3pp).

TikTok's chief executive officer, Chew Shou Zi, is Singaporean, and one of the company's two global headquarters is in Singapore. With the platform's rise in popularity, it has also been classified as an 'internet intermediary', part of a list of platforms with obligations to combat fake news.

Known officially as the Protection from Online Falsehoods and Manipulation Act (POFMA), the country's 'anti-fake news' law is just part of Singapore's elaborate network of laws governing traditional and online media. The laws give the government the right to order the publication of 'corrections' to online content that it considers to be erroneous, or to prevent a 'diminution of public confidence' in the government. In August 2023, a TikTok user received three such correction orders for claims related to public housing and other policies,[140] and in February this year, an order was given to opposition party leader Dr Chee Soon Juan for a video he put on social media, also about public housing. Dr Chee complied with the order and TikTok placed a notice under the original video that links to the government's correction notice.[141] Another opposition leader, Mr Leong Mun Wai, stepped down as the secretary-general of his party in February 2024, in response to correction orders on his social media posts.

Some international observers continue to express reservations about these laws, and more widely the state of free expression and media freedom in Singapore.[142]

Alternative news site The Online Citizen, which had previously received correction orders as well as several sanctions from the government for offences including not declaring its funding, started publishing from Taiwan after again having its publishing licence suspended. A note on its homepage now says it has been marked as a 'declared online location' and is thus still within the regulations. Also displayed on its homepage is a notice saying: 'Multiple falsehoods have been communicated on this page. Viewers should exercise caution when accessing this page for information.'

But the site's staff has set up another site, Gutzy Asia, also published in Taiwan, which covers Singaporean news and a small amount about other countries. The Online Citizen page now consists solely of hyperlinks to stories on Gutzy Asia, and its active Telegram account, where it has more than 5,000 subscribers, also distributes links to Gutzy Asia stories.

The state-owned Mediacorp operates most of the television and radio stations on the island, including the 24-hour news network CNA (used weekly by 33%), English-language Channel 5 (25%), and Chinese-language Channel 8 (23%). It is owned by the government through its investment company, Temasek. The other large player is SPH Media Trust (SMT), which publishes most of Singapore's local newspapers, including the English-language broadsheet *The Straits Times* (used weekly by 36%), Chinese-language *Lianhe Zaobao* (8%), Malay-language *Berita Harian* (4%), and Tamil-language *Tamil Murasu* (2%).

SMT is funded by the government, which has committed S$900m for five years to finance its digital transformation. In the interim, some of its funding is being withheld as it failed to meet certain performance targets set out by the government. To strengthen its regional coverage, SMT acquired Tech In Asia, a publication focused on business tech news, which sparked questions on the use of government funding and mergers in the media industry; the government maintained the acquisition was consistent with the goals of its funding of SMT.

Digital native Mothership remains the most used online news website, though now tied with Channel NewsAsia (46%). Founded in 2014, Mothership has won a following primarily among younger people for its mix of social news and viral posts. But in September 2023, it drew flak after writing an article about a social media video that triggered public outrage against its creator. The article had included some inaccuracies, and Mothership apologised and updated the article. In October 2023, the site again lost its press accreditation for six months after breaking a news embargo for a government announcement on water prices – this restricted its access to government events but did not stop it from publishing.

Edson Tandoc Jr. and **Matthew Chew**
Wee Kim Wee School of Communication and Information, Nanyang Technological University, Singapore

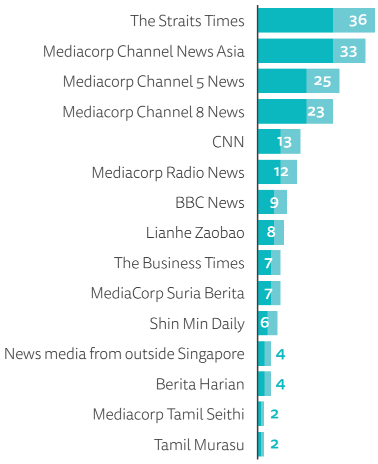
[140] https://www.channelnewsasia.com/singapore/pofma-order-correction-direction-tiktok-user-public-housing-policies-hdb-3721791
[141] https://www.todayonline.com/singapore/chee-soon-juan-pofma-falsehood-public-housing-2368366
[142] https://rsf.org/en/country/singapore

WEEKLY REACH OFFLINE AND ONLINE

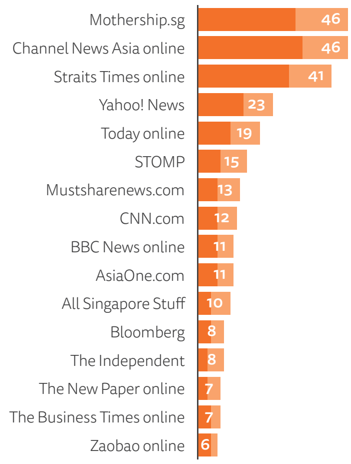
TOP BRANDS
% Weekly usage

- **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

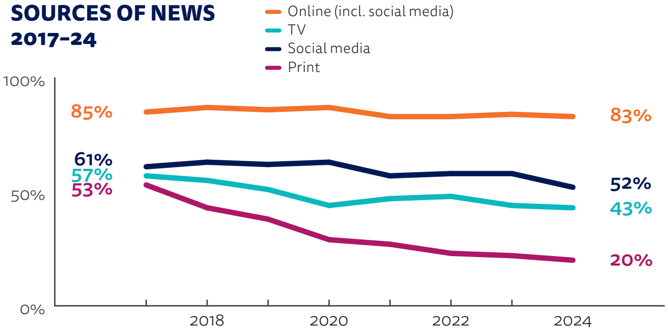


14% pay for **ONLINE NEWS**

CHANGING MEDIA

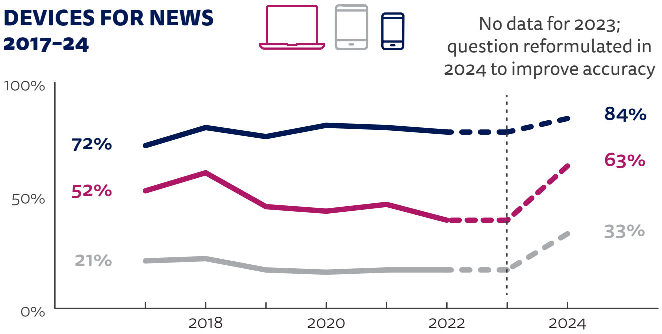
Online and social media remain the most common ways of accessing news in Singapore, while both TV and print have declined significantly over the last few years. Most survey participants do not pay for news.

SOURCES OF NEWS 2017–24



DEVICES FOR NEWS 2017–24

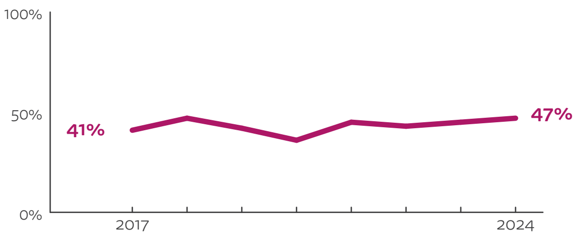
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in the news remains stable at 47% in 2024, with mainstream news brands Mediacorp's Channel NewsAsia (74%) and SPH Media Trust's (SMT) *The Straits Times* (73%) being the most trusted by audiences among the brands included. Alternative and independent outlets tend to be smaller and younger than legacy media organisations, and therefore many of them tend to be less well known. Scores should be seen in that context and not as a measure of the quality or trustworthiness of the content.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

47% OVERALL TRUST 12/47 markets

REPORTERS WITHOUT BORDERS | **WORLD PRESS FREEDOM INDEX SCORE 2024** | Score: 47.19 | **126**/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
All Singapore Stuff	41%	40%	19%
BBC News	63%	26%	11%
CNN	64%	25%	11%
Gutzy Asia (previously The Online Citizen Asia)	31%	43%	26%
Lianhe Zaobao	61%	28%	11%
Mediacorp Channel 5 News	71%	21%	7%
Mediacorp Channel 8 News	69%	23%	7%
Mediacorp Channel News Asia	74%	19%	6%
Mediacorp Radio News	68%	24%	8%
Mothership.sg	55%	30%	15%
Shin Min Daily	54%	31%	15%
The New Paper	58%	30%	12%
The Straits Times	73%	19%	9%
Today online	64%	27%	9%
Yahoo! News	53%	35%	12%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

32% SHARE NEWS via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	WhatsApp	34% (-4)	77%
2	Facebook	32% (-4)	58%
3	YouTube	28% (-2)	67%

Rank	Brand	For News	For All
4	Instagram	20% (+1)	48%
5	TikTok	15% (+3)	33%
6	Telegram	15% (-3)	40%

Population	51m
Internet penetration	97%

SOUTH KOREA

South Korea's news media is characterised by competitive public and private broadcasters, a newspaper sector struggling to adapt to digital change, and powerful Korean-owned portals that dominate the distribution of news online. But in recent years overall news consumption has been falling, especially with younger generations.

The economic slowdown has increased the pressure on South Korean media companies, with major advertisers such as Samsung Electronics and LG Electronics slashing ad spending by more than 30%. Many media outlets posted operating losses in 2023 and even those that recorded profits suffered a sharp drop in their earnings compared with the previous year. Increased video consumption via big online streaming platforms is another factor reducing attention for news programming and consequent revenues. Some broadcasters such as KBS (public media) and JTBC have looked to make savings by reducing staff and slashing production costs.

Newspapers have found it hard to develop new online business models beyond advertising, such as subscription and membership. Many have been tightening their belts while increasing the number of low-cost classified advertisements. News startups also confront a major crisis amid shrinking venture investments.

Compounding these problems are the public's growing disinterest in the news as documented by *Digital News Report* data as well as regular surveys for the Korea Press Foundation (KPF). Latest KPF research shows consumption falling not only via legacy media such as TV News, but also through the major online portals such as Naver and Daum.[143] In particular, the news consumption of those aged between 20 and 40 has shrunk across all media platforms including social media.[144] When accessing news from portals, users are less likely to select a specific news organisation or identify a news provider. In the light of these shifting audience perceptions and behaviours, the media industry will need to explore new strategies and directions.

Korean news media have been looking to use artificial intelligence to boost efficiency and make content more relevant to audiences. *Chosun Ilbo*, a major daily, has developed a news-writing assistant program based on generative AI technology. *Dong-a Ilbo*, another daily, has developed an AI chatbot called 'AskBiz' specialising in business and management content. Meanwhile, media outlets are actively looking to protect news copyright and drive compensation, after big tech companies used publisher content to train their large language models (LLMs). The Korea Press Foundation and media-related associations are working together to jointly establish the 'News Copyright Forum in the AI Era' for discussing legal issues, calculating the value of news content, and establishing industry guidelines for generative AI.

Meanwhile levels of innovation at Korean media outlets remains stagnant. Amid slow digital transformation, journalists feel more fatigue from constant experiments and changes in labour practices. According to a survey by the Korea Press Foundation, when asked about whether they feel fatigue from digital innovation efforts, 38% of journalists answered 'yes' and 34% answered 'moderately'. The fear of missing out on technology advances drives media firms to continue to experiment with new models, but the lack of a long-term strategy has resulted in many failed projects. The explosive growth of online articles and increasingly demanding newsroom workloads have compounded the sense of fatigue – potentially negatively affecting the way journalists respond to technological innovation in the future.

Meanwhile South Korean media companies came under fire for their sensationalised reporting on a movie star who took his own life in December 2023. The actor, who was under investigation for alleged drug use, received intense media attention for several months, with even details of private conversations that were not directly related to the drug probe being recklessly published. After his death, some 2,000 artists and cultural figures issued a statement critical of a sensationalist media culture that reports allegations without checking facts and reports on the private lives of celebrities, even when there is little or no public interest at stake. The media's focus on gaining public attention has intensified since the shift to online platforms and many argue it has contributed to the rapid circulation of low-quality, sensational news. Increased social media use on platforms such as YouTube, used by 51% of our sample for news each week, have compounded the spread of doubts and allegations about the private lives of celebrities without verification.

Hyunwoo Lee and **Youngheum Park**
Senior Researchers, Korea Press Foundation (KPF)

[143] Korea Press Foundation. 'Media Users in Korea'. 2023.
[144] From 2021 to 2023, the use of portal news decreased from 95.4% to 81.9% among those in their twenties and from 94.7% to 88.0% among those in their thirties. Ibid. p. 23.

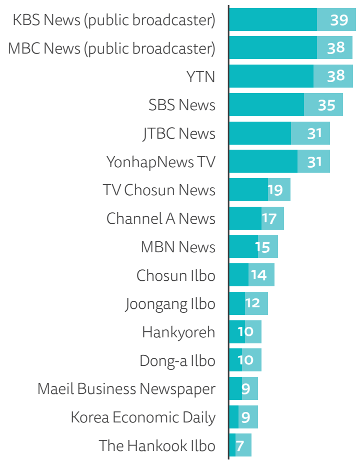
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

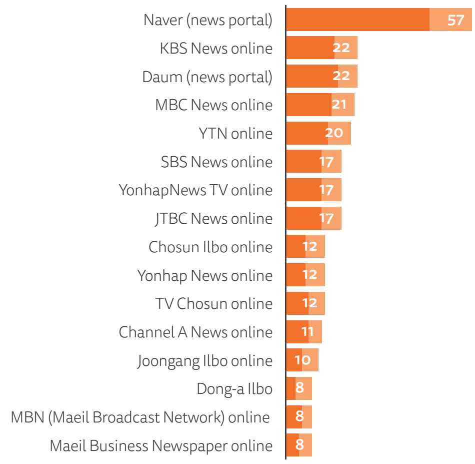
- Weekly use — TV, radio & print
- More than 3 days per week — TV, radio & print
- Weekly use — online brands
- More than 3 days per week — online brands

15% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



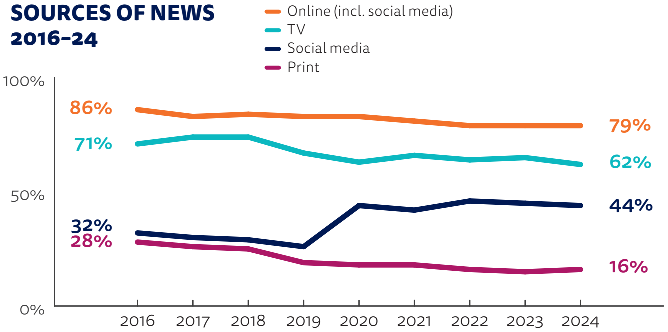
ONLINE



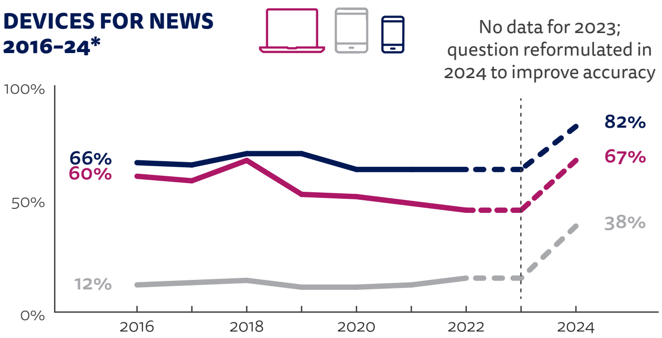
CHANGING MEDIA

Online portals, led by Naver, account for the biggest share of news consumption in South Korea, followed by broadcasters, social media, and print media. Recently, a pattern of a decline in news usage has appeared across the media.

SOURCES OF NEWS 2016–24



DEVICES FOR NEWS 2016–24*

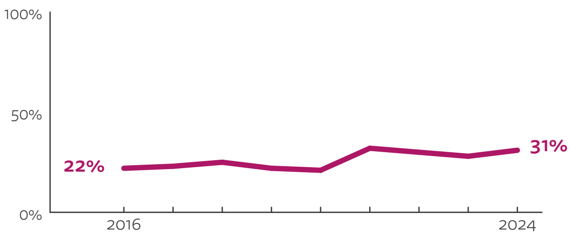


* 2018 figures for computer use were likely overstated due to an error in polling

TRUST

South Koreans' trust in the news remains generally low, with 31% of respondents trusting the news in 2024, a slight increase from the previous year. Among the brands we cover, Koreans tend to trust broadcast media such as MBC, YTN, JTBC, SBS, and KBS, while showing a relatively low level of trust toward newspapers such as *Chosun Ilbo*, *JoongAng Ilbo*, *Dong-a Ilbo*, *Hankyoreh*, and *Kyunghyang Shinmun*.

OVERALL TRUST SCORE 2016–24



Proportion that trusts 'most news most of the time'

31%
OVERALL TRUST =38/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 64.87	62/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Channel A News	41%	30%	29%
Chosun Ilbo	34%	27%	39%
Dong-a Ilbo	38%	30%	32%
Hankyoreh	39%	33%	28%
JoongAng Ilbo	37%	31%	32%
JTBC News	55%	26%	19%
KBS News	51%	24%	25%
Kyunghyang Shinmun	37%	36%	27%
MBC News	57%	21%	22%
MBN News	42%	33%	25%
Regional or local newspaper	34%	40%	26%
SBS News	54%	27%	19%
TV Chosun News	37%	26%	37%
YonhapNews TV	51%	29%	20%
YTN	56%	27%	17%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

22% SHARE NEWS via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	YouTube	51%	(-2)	75%
2	Kakao / KakaoTalk	19%	(-3)	62%
3	Instagram	12%	(-)	38%
4	Facebook	9%	(-1)	27%
5	TikTok	5%	(+1)	15%
6	X (formerly Twitter)	4%	(-)	12%

Population	24m
Internet penetration	95%

TAIWAN

Taiwan's media are dominated by a number of private companies that are both highly competitive and increasingly polarised. Recent presidential elections again put the focus on strained relations with China, which claims the island territory, and pro-independence and pro-unification arguments are often played out in the press.

The January 2024 election was won by pro-independence candidate William Lai of the ruling Democratic Progressive Party (DPP), despite him being labelled a troublemaker by China. Chinese media and officials repeatedly warned people against voting for Lai, with the opposition KMT promising better ties with Beijing. Against the geopolitical backdrop, a media war was taking place in Taiwan. The pro-independent media such as *Liberty Times* adopted a pro-democracy line, saying that voting for the pro-unification candidate would be tantamount to voting for Chinese autocracy. The pro-unification media such as *United Daily* and *China Times* dubbed Lai 'the dangerous friend of the US' who would bring war to the region.

A feature of this election, though, was the rise of a third force, the Taiwan People's Party (TPP), which placed the spotlight on media bias. It launched a boycott of the commercial news channels, alleging biased reporting and pointing out that some of them – notably EBC and Sanlih – were owned by tycoons, who were too close to political parties.

But while TPP called for impartiality, it also launched its own news channels on social media. Its candidate, Ko Wen-je – known popularly as Professor Ko – used social media to appeal to young voters, sometimes making politically incorrect statements which made him seem like a breath of fresh air. He enjoyed the highest social media popularity of any Taiwanese politician – his TikTok posts sometimes attract more than 1.5 million views, and he duly received a quarter of the popular vote, succeeding in his goal of denying any party an overall majority.

Although TikTok is owned by the Chinese technology company ByteDance, it is not banned in Taiwan – indeed it is used by 19% of our sample for any purpose and 8% for news. The pro-independence government does, however, consider it to be a 'a national cybersecurity threat', with the possibility of control by 'foreign hostile forces'.

While the media wars were going on during election season, some news media were tackling social issues, adopting innovations in storytelling, and engaging with young readers. The public broadcaster PTS, one of the most trusted brands, cooperated with Taiwan's fact-checking organisations on countering election misinformation and detecting deepfakes.[145]

Some commercial channels, for example, Formosa TV News, have developed AI news presenters, largely as a demonstration that they were innovative and up-to-date. The AI anchors read stories which were written and checked by journalists. Formosa TV is considering training its AI anchor to read in the Taiwanese dialect, which is different from official Mandarin. PTS published AI guidelines such as avoiding harm and stating that that news reports generated with AI assistance should be reviewed by humans. PTS will also cooperate with Japan's NHK to create a Taiwanese version of the AI sign language anchor for the 2025 Tokyo Deaflympics. It is expected to establish Taiwan's AI sign language for public service purposes, such as disaster prevention and rescue.

Two business news magazines, *CommonWealth* and *Business Weekly*, are among the most trusted brands. Both expanded their markets by launching niche channels and strengthened their digital transformation with multimedia storytelling, data journalism, and AI assistance. Over the years, *CommonWealth*'s digital revenues have increased and largely compensated print losses.

The Reporter, an eight-year-old independent news organisation, continues to make award-winning investigative reports. Its analysis of the trajectory of a Chinese rocket over Taiwan (actually a satellite launch) was adopted and translated by the *Washington Post*. Since 2022 it has run a 'Junior Reporter' project, inviting teenagers to read and write news stories and to interview the three presidential candidates.[146]

Since 2020 Taiwanese news publishers have lobbied for the government to lean on the US-based tech giants to pay for news. Legislators have proposed drafts for bargaining codes and journalism funds as in other countries. Google launched a US$10m three-year programme to help news providers with digital transformation. Twenty-three applicants gained grants in 2023, but it was not without criticism – first, that it was to support digital transformation, not news; second, that some tech companies received grants, not only news publishers; and third, that the fund was temporary.

Lihyun Lin
National Taiwan University

[145] PTS, 'Fake News in the Election'. 6 Dec. 2023. https://newslab.pts.org.tw/video/289. 'Spot Deep Fakes Created by AI'. Feb. 2024. https://www.youtube.com/watch?v=J56oMYQ2Heg

[146] The Reporter, 'The Reporter's impact report 2023'. https://drive.google.com/file/d/1vexsf91G7v-xzBEIodn9xyQpwP92hNGQ/view

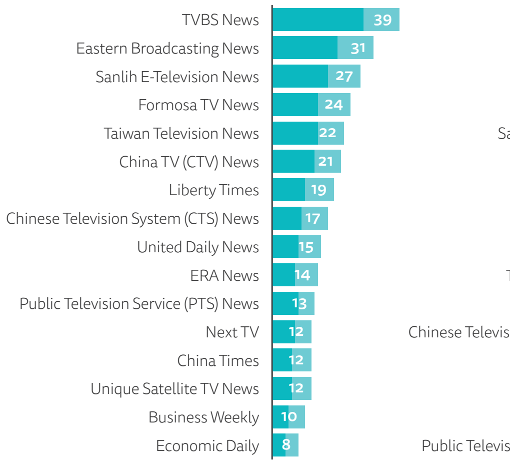
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

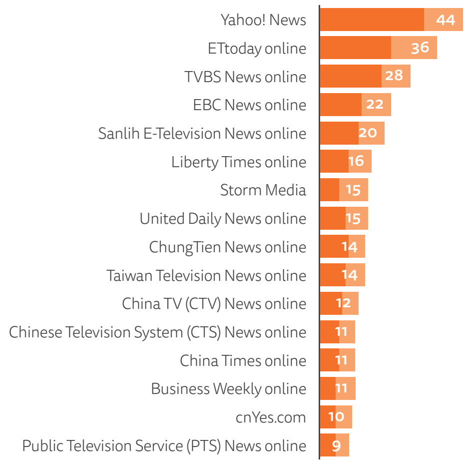
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

15% pay for **ONLINE NEWS**

TV, RADIO, AND PRINT



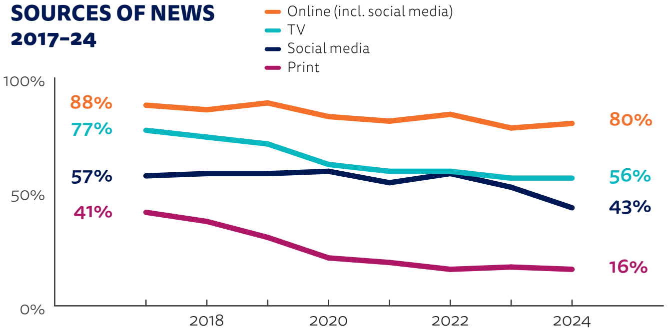
ONLINE



CHANGING MEDIA

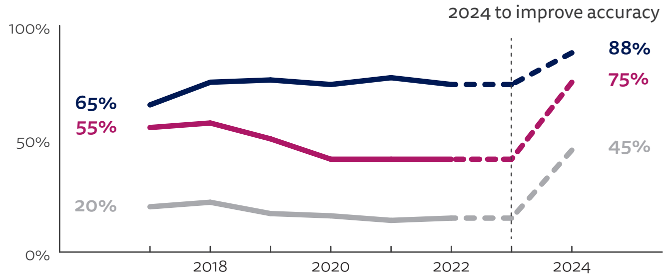
Traditional media sources such as television and print have become less important over time while digital news has consolidated its position. YouTube (46%) is the most important online platform for news, with Facebook (39%) losing traction.

SOURCES OF NEWS 2017–24



DEVICES FOR NEWS 2017–24

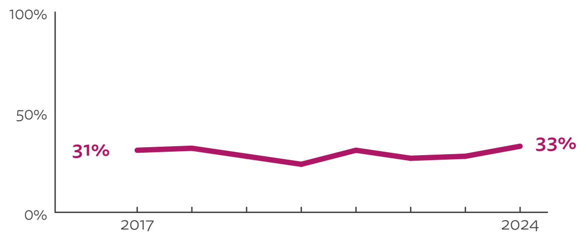
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in the news has risen by 5 percentage points in this election year but remains amongst the lowest in our multi-market survey. Trust in specific news brands, such as investigative news magazines *CommonWealth* and *Business Weekly*, is also up, together with public broadcaster PTS. Public service media, together with fact-check organisations and the government, have tried to step up their efforts on how to counter misinformation in the last year.

OVERALL TRUST SCORE 2017–24



Proportion that trusts 'most news most of the time'

33% **OVERALL TRUST =33/47 markets**

REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 76.13	27 / 180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Business Weekly	59%	33%	8%
China TV (CTV) News	49%	37%	15%
Chinese Television System (CTS) News	46%	38%	16%
CommonWealth Magazine	59%	32%	9%
EBC News	50%	37%	14%
Economic Daily	58%	35%	8%
ETtoday.net	51%	37%	12%
Formosa TV News	40%	33%	27%
Liberty Times	41%	34%	25%
Public Television Service (PTS) News	58%	31%	11%
Sanlih E-Television (SET) News	38%	31%	31%
Storm Media	41%	40%	20%
TTV News	50%	38%	12%
TVBS News	55%	33%	12%
United Daily	51%	37%	12%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

33% **SHARE NEWS** via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	YouTube	46% (+2)	68%
2	Line	41% (-6)	63%
3	Facebook	39% (-2)	63%
4	Instagram	11% (+1)	31%
5	TikTok	8% (+3)	19%
6	Facebook Messenger	7% (+1)	25%

Population	**70m**
Internet penetration	**88%**

THAILAND

Media freedom remains constrained after years of tight control by leading politicians, the military, and other elites. Thai media remain free to criticise government policies and cover instances of corruption, but a strict lese-majesty law prohibits reporting that is critical of the royal family. Journalists also tend to exercise self-censorship regarding the military, the judiciary, and a range of other sensitive issues.

Last year's elections sparked much hope among young people in particular about a shift towards democracy, with a strong showing for reformist groups Move Forward and the Pheu Thai party. One year on, this optimism dimmed after backroom deals which saw Pheu Thai forming a coalition with parties backed by the military. Once democracy champions, Pheu Thai's alignment with conservative forces has bewildered supporters, eroding trust. The release from prison of former prime minister Thaksin Shinawatra, just a few months after his return from exile following his eight-year conviction for historic abuse of power, has further deepened public scepticism around commitment to change.

Against this background, transparent reporting, fostering accountability, and informed discussion remain in short supply, with the press mostly afraid to speak out against powerful elites – and with self-censorship still widely practised in mainstream media. News coverage of the royal family is a case in point. While online and social media platforms serve as conduits for alternative perspectives, traditional news agencies often tread cautiously, mostly refraining from delving beyond establishment-sanctioned narratives. The recent arrest and ongoing legal proceedings against a news reporter and photographer, after their coverage of anti-lese-majesty graffiti at the Grand Palace, underscore the precarious nature of journalistic freedom in the country.[147] Meanwhile the issues of the royal succession remain unresolved. Concerns regarding the whereabouts of the king's eldest daughter and the sudden return of his exiled son from the US persist, serving as focal points of heightened online discussion.

Thais are deeply immersed in the digital world, enthusiastically embracing social media as a primary news source. Platforms like Facebook, YouTube, Line, and TikTok have become integral parts of daily life. Among these social media, YouTube is the most important as a platform for generating income for individuals and publishers. Thailand is also a leading market for TikTok's entertaining content, with a remarkable 39% of users now turning to the platform for news – a significant 9-point jump from 2023. This trend signifies a growing openness to diverse sources of information and a willingness to engage with news in innovative ways, potentially paving the way for a more dynamic and inclusive media landscape in Thailand. The trend of online celebrities (and journalists) cultivating personal brands while reporting the news is set to flourish further, with their follower counts anticipated to soar.

Multichannel TV, via cable and satellite, is widely available in Thailand, with leading providers including Channel 3 HD, Thai Rath TV, and Channel 7 HD. But broadcast licences are expensive and some have given them up to pursue online-only opportunities, with others expected to follow. Meanwhile, Thailand's privately run print media have also been struggling, with just a handful of Thai-language dailies accounting for most newspaper sales. Traditional media dominate online consumption, however, with *Thai Rath* being the leading provider with a 46% share, followed by *Khaosod* online at 26%. Popular news talk programmes like *Hone-Krasae* on Channel 3 HD attract millions of viewers daily on YouTube, highlighting the public's fascination with opinion-driven content.

Meanwhile, in a surprise move, Voice TV, a channel closely aligned with Thaksin, announced it would be closing down amidst an identity crisis in his camp and the rise of new political movements. Launched in 2008, Voice TV started as a satellite channel but later became a digital pioneer, streaming content via YouTube and Facebook. Around 100 staff members and journalists will lose their jobs.

The need to compete for attention online has led many mainstream news providers towards more sensationalist reporting, exemplified by extensive coverage of a foreign expat assaulting a local Thai doctor in Phuket, sparking debates on policies around property ownership. Meanwhile, the Thai public's voracious appetite for supernatural beliefs was highlighted by the attention given to a giant gargoyle-like statue of a winged man with fangs and talons that was installed outside a Bangkok hotel. Some came to worship the statue of a supposed revered teacher of the Khmer faith called Kru Kai Kaew, as a 'god of wealth', even asking for blessings for their lottery numbers. In contrast, others called it sacrilegious and demanded its removal.[148] The saga led to extensive coverage and debate in mainstream and social media platforms.

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Asian Network for Public Opinion Research (ANPOR)
Dhanaraj Kheokao
Potsdam University, Germany

[147] https://www.reuters.com/world/asia-pacific/thai-journalists-arrested-news-coverage-anarchist-graffiti-temple-2024-02-13/
[148] https://www.scmp.com/news/asia/southeast-asia/article/3231581/giant-gargoyle-statue-stirs-controversy-bangkok-he-lucky-or-sacrilegious

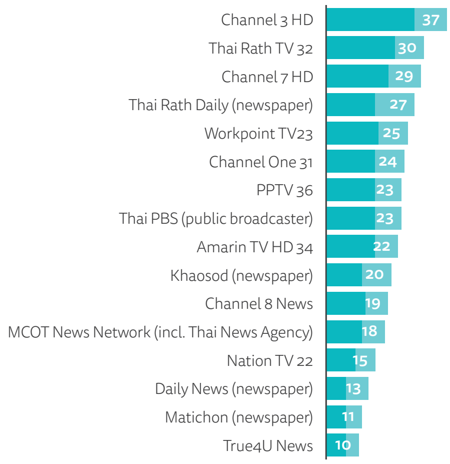
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

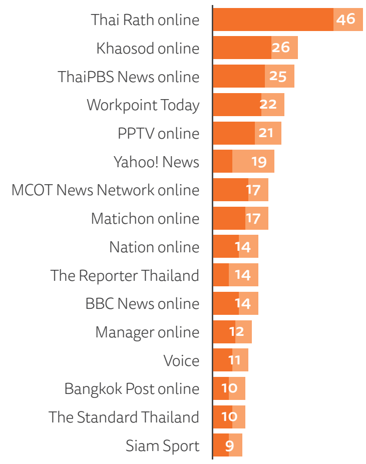
% Weekly usage

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

TV, RADIO, AND PRINT



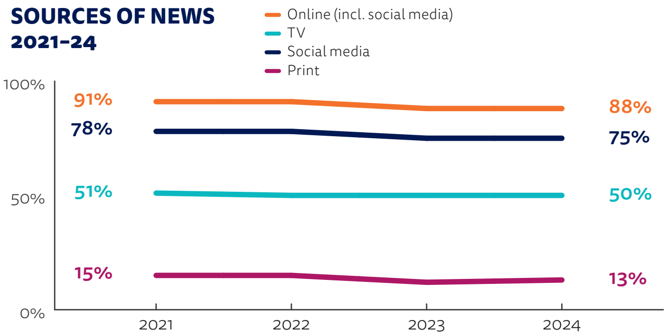
ONLINE



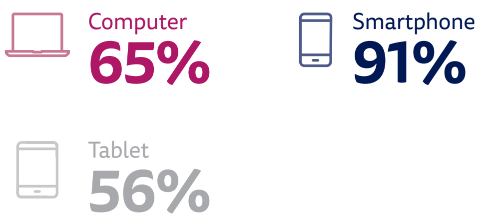
CHANGING MEDIA

Although television remains an important source of news for older Thais, our more educated, urban sample relies heavily on online and social media sources for news. The most important social media platforms for news include Facebook, YouTube, Line, and TikTok.

SOURCES OF NEWS 2021–24



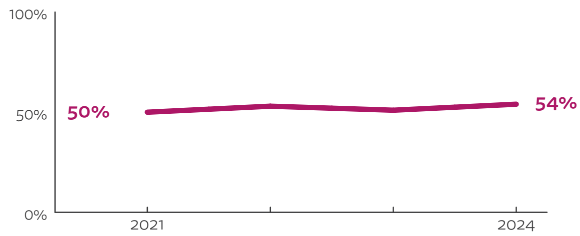
DEVICES FOR NEWS



TRUST

In the wake of last year's election, trust in the news is slightly up at 54% (+3pp). Thais continue to have considerable trust in most mainstream news brands, due to a combination of traditional deference and their role in verifying and investigating information first seen in social networks. This dynamic has helped maintain credibility despite the proliferation of platforms like TikTok.

OVERALL TRUST SCORE 2021–24



Proportion that trusts 'most news most of the time'

54% OVERALL TRUST 9/47 markets

RSF Reporters Without Borders	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 58.12	87/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Amarin	69%	23%	8%
Bangkok Post	66%	29%	6%
Channel 7 HD	74%	22%	5%
Daily News	65%	28%	7%
Khaosod	67%	26%	7%
Krobkruakao 3	68%	24%	8%
Manager	60%	30%	10%
Matichon	67%	26%	8%
MCOT News Network	70%	25%	5%
Nation	62%	25%	13%
PPTV	70%	26%	5%
Regional or local newspaper	59%	33%	8%
Thai PBS (public broadcaster)	72%	22%	6%
Thai Rath	70%	22%	8%
Workpoint TV	73%	22%	6%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

40% SHARE NEWS via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	64%	(-1)	77%
2	YouTube	56%	(+2)	79%
3	Line	42%	(-6)	67%
4	TikTok	39%	(+9)	58%
5	Facebook Messenger	20%	(-1)	45%
6	X (formerly Twitter)	17%	(-5)	25%

SECTION 3

SECTION 3

Analysis by Country and Market

Africa

Population	56m
Internet penetration	85%

KENYA

Kenya's media scene is characterised by a small number of privately owned groups, a state-funded public broadcaster, and widespread use of social media. Press freedom is enshrined in the constitution but is threatened by a combination of a hostile government and a prolonged economic downturn.

William Ruto's election as president in August 2022 marked the start of a challenging time for the media, with politicians and officials showing little tolerance for reporting that is seen as overly critical of government policies. Senior figures, including the Deputy President and Cabinet Secretaries, have openly threatened independent media, resulting in the sacking of several prominent journalists and news managers.[149] There has been economic pressure too. Early in its term, the government awarded the contract for carrying its weekly publication (MyGov) to just one newspaper, leading to suggestions it was looking to reward favourable coverage. More recently the government indicated that it would withdraw advertising from *all* independent media and direct them toward the state-run Kenya Broadcasting.

The situation is exacerbated because the country is going through an economic downturn that has affected the capacity of private media to operate sustainably. Given the importance of government advertising, it is often hard for media houses to withstand political pressure, and reports indicate that many have been pulling back from critical reporting or are operating a degree of self-censorship. Some newspapers, such as the Aga Khan-owned *Nation*, had to pull investigative pieces critical of the government due to pressure from the seemingly intolerant ruling party and its leadership. Despite this, more critical conversations are still happening online and via small news outlets or blogs whose audiences are growing.

Parts of the media in Kenya have recently come under malicious and damaging online attacks. Stories were spread on X falsely suggesting The Standard Group (SG) was about to close down or was insolvent[150] and similar rumours were spread about Nation Media Group (NMG). The *Nation* claimed, in an editorial, that the attacks began immediately after the paper started running the 'Broken System' series, which reported on inefficiencies in government institutions, including the immigration department, Kenya Bureau of Standards, hospitals, and others.[151]

The financial strain on media organisations has worsened following years of COVID-19-related austerity measures, resulting in staff cuts, wage reductions, and limitations on content development. Journalists' salaries have not been restored to pre-pandemic levels and even then, at some publications, the salaries are delayed for at least two or three months at a go and only released when journalists threaten industrial action. The print media have reduced their pagination to help them stay afloat, despite the challenges.

Few people are prepared to pay for online news in Kenya, but the *Nation* has been tightening its paywall after briefly dropping it during the recent elections. The paper operates a freemium model with generic news for free but with some opinion pieces by popular writers now behind the paywall. The paper is also publishing more 'sponsored' content as a way of shoring up its revenue. Some popular TV networks have also begun charging for news interviews online, with these developments seen as a necessary evil given the financial difficulties.

Traditional media houses also face competition online from digital-born websites such as Tuko.co.ke, which reaches around 70% of our online sample each week. Much of its content is focused on entertainment and gossip attracting a younger audience. Tuko.co.ke also has a reputation for breaking and frequently updated news, which many older outlets struggle to match.

Meanwhile, social media experienced the most significant increase by 5 points to 77%, with YouTube and TikTok showing an increase in their use for news. YouTube grew by 8% to 59%, while TikTok grew by 7% to 36%. Even though Facebook use remained stable, it is still the most popular social network for news along with WhatsApp (60%) – both owned by Meta. X is the biggest loser, with a decline of 3% from the previous year to 37%.

Kenyans' heavy use of different social and video platforms is raising concerns at the highest levels, with a particular focus on TikTok. A petition to Parliament recently called for an outright ban, describing the app as 'a serious threat' after it said the platform had been used to promote violence, explicit content, and offensive behaviour. TikTok's popularity with young people and businesses means that government is likely to opt for stronger regulation, rather than outlawing the app completely.[152]

Catherine Gicheru
ICFJ Fellow and Director, Africa Women Journalism Project
George Nyabuga
Associate Dean and Associate Professor of Media and Journalism, Aga Khan University's Graduate School of Media and Communications

[149] https://www.talkafrica.co.ke/the-media-in-kenya-right-now-is-facing-an-existential-crisis/
[150] https://twitter.com/ItsKiprotich1/status/1772855042069922203.
[151] https://www.theeastafrican.co.ke/tea/news/east-africa/why-cowardly-cyberbullying-will-not-dissuade-nmg-from-discharging-its-public-interest-mandate-4520040
[152] https://www.semafor.com/article/04/19/2024/tiktok-fight-in-kenya

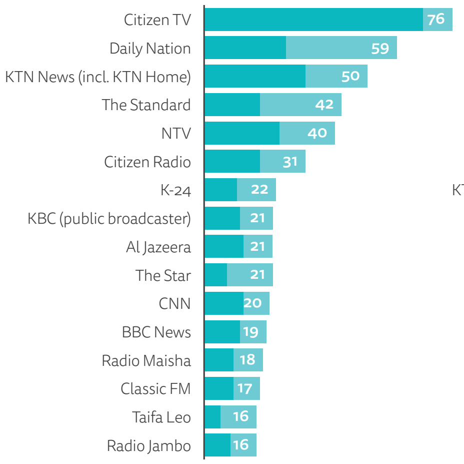
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

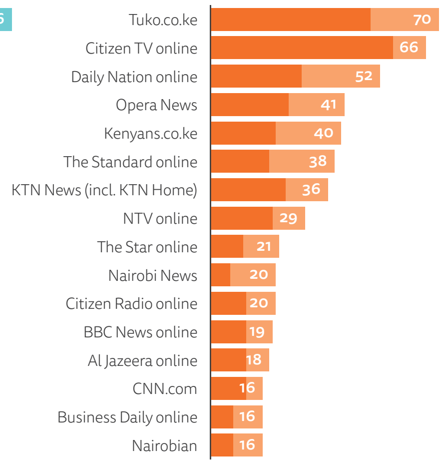
% Weekly usage

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

TV, RADIO, AND PRINT



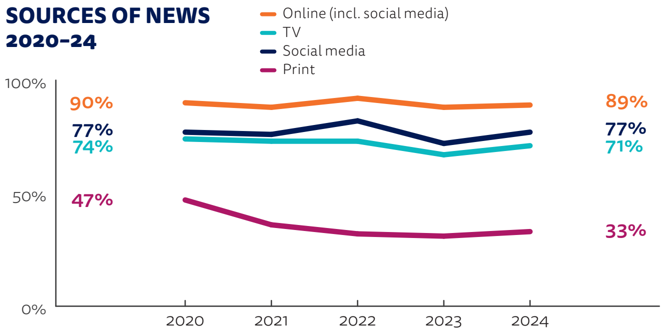
ONLINE



METHODOLOGY NOTE

These data are based on an online survey of mainly English-speaking, online news users in Kenya – a subset of a larger, more diverse, media market. Respondents were generally more affluent, younger (18–50 only), have higher levels of formal education, and are more likely to live in cities than the overall Kenyan population. Findings should not be taken to be nationally representative.

SOURCES OF NEWS 2020–24



DEVICES FOR NEWS

Computer **82%**

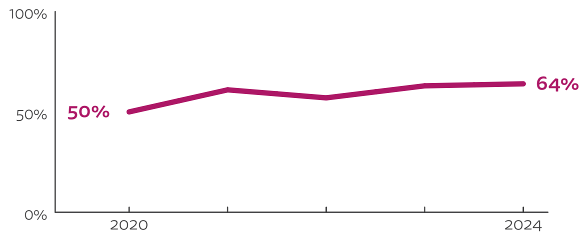
Smartphone **94%**

Tablet **48%**

TRUST

Overall trust in the news (64%) is relatively high compared with other countries in our survey. Many of the most popular commercial brands such as Citizen, NTV, KTN, and the *Daily Nation* are trusted by around 90% of our sample. This is a reflection of the independent reputation of most Kenyan media, despite growing economic and political pressures.

OVERALL TRUST SCORE 2020–24



Proportion that trusts 'most news most of the time'

64% OVERALL TRUST
2/47 markets

REPORTERS WITHOUT BORDERS **WORLD PRESS FREEDOM INDEX SCORE 2024** Score: 53.22 **102**/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
BBC News	87%	7%	6%
Citizen Radio	89%	6%	5%
Citizen TV	91%	4%	4%
Daily Nation	91%	5%	4%
K-24 TV	84%	10%	7%
KBC (public broadcaster)	82%	9%	9%
KTN News	91%	5%	4%
NTV	91%	5%	4%
Radio Jambo	81%	12%	7%
Radio Maisha	82%	11%	7%
Taifa Leo	82%	10%	8%
The Business Daily	83%	10%	6%
The People Daily	78%	13%	9%
The Standard	89%	7%	4%
The Star	77%	13%	10%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

59% SHARE NEWS via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	60%	(-1)	75%
2	WhatsApp	60%	(-)	83%
3	YouTube	59%	(+8)	81%
4	X (formerly Twitter)	37%	(-3)	48%
5	TikTok	36%	(+7)	61%
6	Instagram	29%	(-)	52%

Population	37m
Internet penetration	69%

MOROCCO

Morocco's constitution guarantees freedom of expression and prohibits censorship, but in practice, critical journalistic voices are often subject to harassment or even criminal proceedings. News companies are dependent on government subsidies, with many topics remaining outside the bounds of journalistic criticism. Meanwhile, social media have become one of the main sources of information.

Television and radio remain an important source of news for many Moroccans, with the editorial line of leading outlets generally in line with governmental priorities and acting as official sources for news. In recent years, the state has strengthened its influence on the broadcast sector, taking a stake in many of the most popular channels, including market leader 2M.

The vast majority of Morocco's news media is in Arabic but some of the most influential business publications are in French. The press sector was hit particularly hard by the COVID-19 pandemic and total daily newspaper circulation typically does not exceed 100,000, while periodicals only achieve sales of 25,000.[152] Printed newspapers are almost all state-subsidised, but this money comes with strings attached. Although some scrutiny of government policies is allowed, most print media abide by unspoken rules, including avoiding criticism of the monarchy, the military, the intelligence services, anything relating to the Western Sahara issue, or the handling of the COVID-19 crisis, and a range of other sensitive issues. That said, media ownership in the country is varied, including royal company subsidiaries, as well as a web of companies and business interests and moguls owning major shares in media companies across the spectrum.[154]

A recent World Freedom Press Index report by Reporters without Borders highlights a lack of legal safeguards for freedom of expression and press freedom, a low level of judicial independence, and the harassment of independent journalists, who it says are often subjected to arrest without warrant and prolonged pre-trial detention.[155]

Trumped-up sex and spying charges have been used against several journalists in the past five years, including Omar Radi, Taoufik Bouachrine, and Soulaimane Raissouni.[156] These cases have sent a strong message to journalists across the country that the state will not be lenient on journalists it deems to be a threat, while also further encouraging self-censorship amongst the profession. Although a new press law was introduced in 2016, the state has tended to pursue journalists through criminal law and steered away from directly prosecuting journalists for their written pieces, under the journalism code of conduct. The state has also been meddling with the working of the National Press Council, which saw its independence diluted through the newly introduced law NO. 90.30.[157]

Morocco's news media consumption as highlighted in Digital News Report survey data is heavily concentrated on online (79%) amongst our more urban, educated sample. This compares with 41% for TV and just 14% for print, which is mainly used by older generations. Increasingly, the whole population relies on a combination of smartphones and social media. Facebook (51%) and YouTube (50%) are the most widely used online platforms for news, but TikTok (22%) is popular with younger generations. YouTube is especially used by bloggers, political commentators, and other social media influencers to publish content that is on the borders of what is accepted speech in Morocco.

Heavy use of social media combined with relatively low trust in traditional sources has left Moroccans vulnerable to regular bouts of misinformation, especially during the COVID-19 pandemic. Many amateur YouTubers were arrested for instigating misinformation (claiming the virus does not exist), or directly opposing the strict measures against public gatherings, or challenging the decision to close mosques.

Overall trust in news sources in Morocco is low (31%), ranking Morocco 38 out of 47 surveyed countries, but some specific brands have higher levels of trust, including Medi1 TV and Medi1 Radio with 68% and 65% of respondents respectively. Medi1 TV is a publicly created private media company based in Tangier with a varied ownership of private banks and retirement funds in Morocco.[158] Morocco's online subscription model is still nascent, with the vast majority of publications free at the point of access and big online outlets such as Hespress relying on online advertising as their prime source of revenue.

Morocco's media scene remains fragile, with traditional business models under pressure and online advertising not making up the gap. Against this background, many Moroccans are turning to independent self-produced media such as YouTube channels of Moroccans, independent journalists, citizen journalists, or Pan-Arab media such as Al Jazeera, who are often the only ones producing content critical of the current situation.

Imru AL Qays Talha Jebril
Research fellow at the Moroccan Institute for Policy Analysis

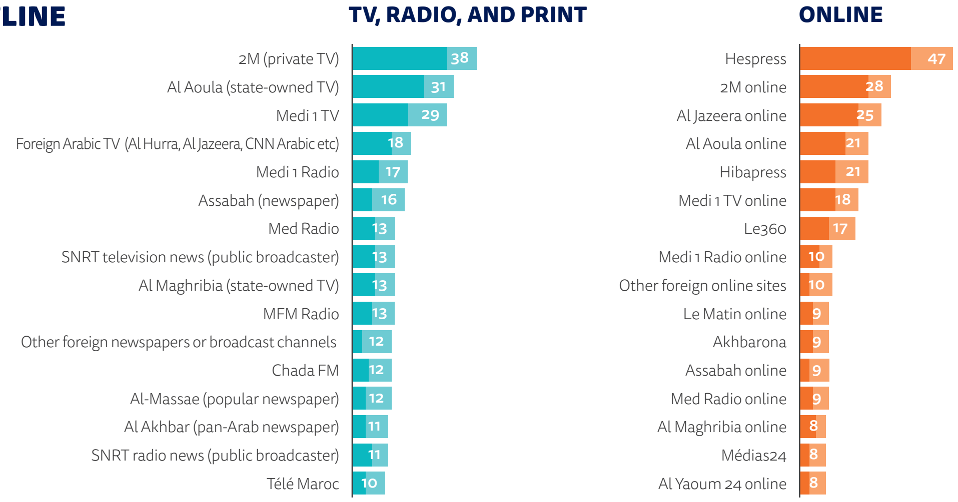
[153] https://fr.hespress.com/357141-presse-papier-au-maroc-le-crepuscule-dun-parchemin.html
[154] https://fr.hespress.com/326376-le-maroc-enregistrait-quotidiennement-entre-20-a-25-fake-news-durant-la-pandemie-du-covid-19.html
[155] https://rsf.org/en/country/morocco-western-sahara
[156] https://www.france24.com/en/live-news/20230719-moroccan-court-keeps-two-journalists-behind-bars
[157] https://wjwc.org/reports/moroccos-press-freedom-at-risk-concerns-of-erosion-and-bleak-future
[158] https://maroc.mom-gmr.org/fr/proprietaires/societes/detail/company/company/show/medi1-tv/

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

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



CHANGING MEDIA

Online and social media remain popular sources of news in Morocco with our educated and more urban sample, but TV and print remain important with older generations and for those who are not online.

SOURCES OF NEWS

TV **41%**

Online (including social media) **79%**

Print **14%**

Social media **60%**

DEVICES FOR NEWS

Computer **63%**

Smartphone **82%**

Tablet **36%**

TRUST

Overall trust in news sources in Morocco is amongst the lowest in our survey at just 31%. Many Moroccans do not see news media as truly independent, avoiding sensitive subjects and mostly reflecting government views and perspectives. Some specific brands, however, do have a reasonable level of trust, including some of the most widely used outlets on TV and online.

31% OVERALL TRUST =38/47 markets

53% MISINFORMATION CONCERN =33/47 markets

RSF REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 45.97	129/180

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

AUDIENCE BRAND TRUST SCORES

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

Brand	Trust	Neither	Don't Trust
2M	60%	16%	24%
Al Aoula	64%	15%	20%
Al Maghribia	59%	20%	21%
Al Yaoum 24	49%	27%	24%
Al-Massae	53%	26%	21%
Assabah	52%	26%	22%
Hespress	63%	17%	21%
Hibapress	53%	23%	25%
Le Matin	53%	24%	23%
Le360	50%	25%	24%
Medi 1 Radio	65%	17%	18%
Medi 1 TV	68%	16%	16%
Morocco World News	46%	29%	25%
SNRTNews	57%	20%	22%
Télé Maroc	52%	24%	24%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

35% SHARE NEWS via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	51%	62%
2	YouTube	50%	66%
3	WhatsApp	36%	62%
4	Instagram	33%	47%
5	TikTok	22%	34%
6	Telegram	12%	23%

Population	211m
Internet penetration	73%

NIGERIA

The Nigeria media landscape features a blend of traditional and digital platforms, with over 80 locally owned digital news outlets or startups. Challenges include dwindling advertising revenues, greater regulatory scrutiny, and threats to press freedom. Social media are widely used for news, but misinformation and hate speech present integrity concerns.

Traditional media such as television and print have been losing reach and influence in recent years as digital and social media plays a bigger role in shaping public discourse. Even so, there are still around 100 national and local print titles, of which the best known include *The Punch*, *The Nation*, *Vanguard*, *The Guardian*, and *The Premium Times*.

National broadcasting media in Nigeria, including both public and private entities, still remain primary sources of information for many Nigerians and often benefit from a perception of trust and credibility among viewers. The Nigerian Television Authority (NTA), as the country's largest public broadcaster, maintains a wide reach through its network of stations across Nigeria. Private broadcasters like Channels Television, Arise TV, TVC News, and African Independent Television have gained prominence for their objective journalism and comprehensive coverage of news events, both domestically and internationally. In response to changing consumer preferences and technological advancements, Nigerian broadcast channels have embraced digital platforms to expand their reach and engage with audiences more effectively. Many of these national broadcasters now offer live-streamed channels on platforms like YouTube. Additionally, several broadcast channels operate 24 hours a day, ensuring continuous coverage of breaking news and events.

But in recent years many Nigerians have been turning to online sources, driven by the increasing use of smartphones by one of the youngest populations in Africa. Our survey shows that nine in ten (91%) of our respondents access news online each week from traditional websites, apps, or social media platforms.

Platforms like Facebook (75%), YouTube (70%), Instagram (58%), Telegram (53%), and TikTok (46%) have become popular and many use them to access bite-sized news updates and interactive content tailored to these mobile users. Additionally, podcasting has gained traction with popular news shows like Nigeria Politics Weekly and Nigeria Daily. Furthermore, media organisations are increasingly leveraging artificial intelligence (AI) to enhance content personalisation, to assist with fact-checking, and for customer support. Legit.ng, which is one of the leading digital-born brands in Nigeria, uses AI to curate personalised news feeds, while organisations like Dubawa and The Cable employ AI to combat misinformation. These innovations underscore a paradigm shift in audience engagement and content delivery within the Nigerian media landscape.

The publishing industry faces significant economic challenges from dwindling advertising revenues, prohibitive licence fees, and rising costs linked to the devaluation of the naira. The National Bureau of Statistics reported a headline inflation rate of 32% in February 2024, exacerbating production costs, squeezing profit margins for media companies, and leading to layoffs.[159] Salary arrears for journalists can reach months or even years, according to the human rights group RSF, and the economic weakness of news organisations makes them vulnerable to undue influence by politicians and business people, it says.[160]

As businesses cut advertising budgets, several publishers, including *THISDAY*, *The Guardian*, and *Vanguard*, have introduced subscription models for their e-paper editions, but with charges as low as $0.30 per week revenue is limited and the exact number of subscribers remains undisclosed. Grant support from international organisations or non-profits such as the Nigeria Media Innovation Programme and the MacArthur Foundation helps support sustainability in the short term, but can't be relied on over time. Initiatives include mentoring and capacity-building for digital startups and innovation as well as training support and advice on digital transition for the sector overall.

Beyond economic pressures, press freedom violations abound in the aftermath of last year's general elections. These include physical attacks on journalists, bombings of broadcast stations,[161] and government sanctions against media houses. Lawsuits against media organisations and journalists, often stemming from allegations of defamation or privacy violations, are not uncommon. Organisations like Socio-Economic Rights and Accountability Project (SERAP), Committee to Protect Journalists, and civil society organisations (CSOs) are actively engaging in legal battles to safeguard journalists' rights and media freedom.[162]

The proliferation of misinformation, fake news, and hate speech on social media that was also a feature of the recent elections poses significant challenges to media integrity and ethical journalism standards. But newly proposed legislation, such as the National Broadcasting Commission (NBC) Act Amendment Bill, and the Social Media Bill have also raised concerns about censorship, prompting pushback from journalists and CSOs advocating for a free media environment.

Tolulope Adeyemo
Code for Africa

[159] https://techcabal.com/2023/08/04/big-cabal-media-reduces-workforce/
[160] https://rsf.org/en/country/nigeria
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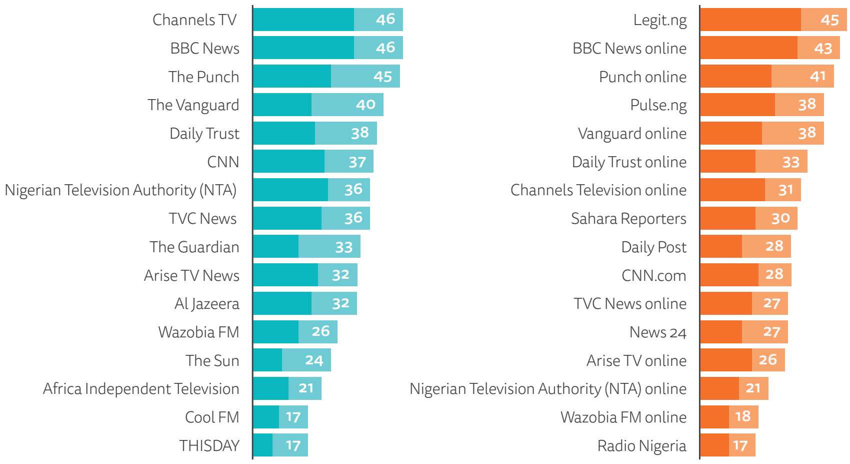
[162] https://www.vanguardngr.com/2023/09/just-in-serap-sues-tinubu-over-unlawful-ban-of-25-journalists-from-aso-villa/

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

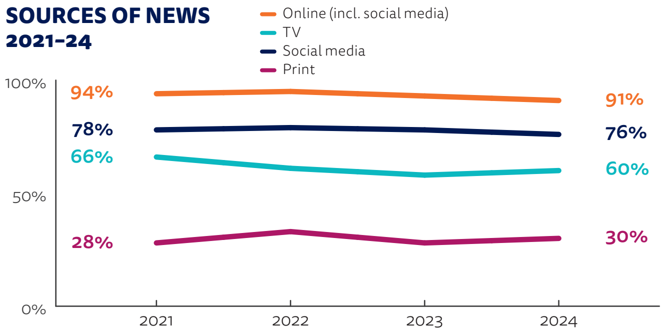
TV, RADIO, AND PRINT | ONLINE



METHODOLOGY NOTE

These data are based on a survey of English-speaking, online news users in Nigeria – a subset of a larger, more diverse, media market. Respondents are generally more affluent, younger (18–50 only), have higher levels of formal education, and are more likely to live in cities than the wider Nigerian population. Findings should not be taken to be nationally representative.

SOURCES OF NEWS 2021–24



DEVICES FOR NEWS

Computer **77%**

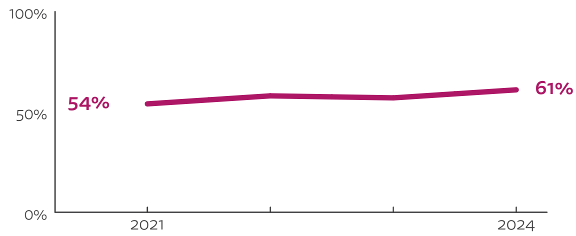
Smartphone **91%**

Tablet **54%**

TRUST

Brand trust in Nigeria has increased by 4 percentage points, ranking third across 47 surveyed markets. This surge is likely attributed to heightened reliance on legacy media during the recent election. Independent brands like BBC News, Channels TV, and *The Punch* continue to maintain particularly high scores, underscoring their credibility and influence.

OVERALL TRUST SCORE 2021–24



Proportion that trusts 'most news most of the time'

61%
OVERALL TRUST =3/47 markets

REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 51.3	112/180

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

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
Africa Independent Television	78%	10%	12%
Arise TV News	83%	9%	8%
BBC News	86%	7%	8%
Channels TV	86%	6%	8%
News Agency of Nigeria	73%	15%	12%
Nigerian Television Authority (NTA)	73%	11%	16%
Premium Times	78%	14%	9%
Pulse.ng	77%	13%	10%
The Guardian	83%	9%	8%
The Nation	76%	13%	11%
The Punch	84%	8%	8%
The Sun	78%	13%	9%
The Vanguard	83%	8%	8%
THISDAY	77%	14%	9%
TVC News	79%	10%	11%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

64%
SHARE NEWS
via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News	For All
1	Facebook	62% (-2)	75%
2	WhatsApp	58% (-5)	77%
3	YouTube	44% (+4)	70%
4	X (formerly Twitter)	40% (-4)	51%
5	Instagram	38% (+2)	59%
6	Telegram	30% (+4)	53%

Population	60m
Internet penetration	58%

SOUTH AFRICA

South Africa is entering a new era of coalition politics, after the ANC lost its parliamentary majority for the first time since it swept to power at the end of apartheid. These changes come as news media has been subject to a hollowing out of the resources, including retrenchments and the closing down of news titles. More positively, trust in media is holding steady despite lapses in editorial rigour by some publications.

Two newspapers ceased publishing: the 125-year-old *Pretoria News* and the almost 80-year-old *Weekend Post*. The two media groups that owned them, Independent Media and Arena Holdings, also embarked on processes of retrenchment. Independent said they were aiming to cut their staff by 40%, and Arena implemented a restructuring process without specifying the number of people affected. The South African National Editors Forum (SANEF) lamented the effect that these cuts are having on the diversity and plurality of voices in newsrooms.

The Audit Bureau of Circulations (ABC) reported a year-on-year decline of 7.4% for the collective circulation of its print members. Tellingly, ABC's membership dropped from 448 in 2022 to 403 at the end of 2023. The SABC's TV audience ratings have declined by over 40% over the past seven years, and the public broadcaster has over R1.3bn debt due to signal distributor Sentech by April 2025, with losses growing across its wider operation.

Top digital news site News24 reported in January 2024 that they had broken the 100,000-subscriber mark, making it the largest news website in Africa in terms of paid subscriptions. The independent Daily Maverick has grown its paid membership base to 27,500. Other news organisations are less open about their subscription figures. In another positive sign, broadcaster Eyewitness News launched a new on demand 'daily English and IsiZulu *TV News* bulletins' as part of a multiplatform strategy.

In an attempt to address the straitened commercial circumstances of news media, as well as the perceived lack of accountability by big digital platforms, the Competition Commission of South Africa initiated the Media and Digital Platforms Market Inquiry (MDPMI) to investigate the distribution of media content on digital platforms, and to interrogate the market for advertising technology. The Commission said that its purpose was to determine if there are any features that may be adversely affecting competition or undermining the purposes of the Competition Act. The MDPMI heard submissions from over 40 stakeholders, including SANEF, who said that big tech firms 'must be held to more stringent rules for the publishing and distribution of news content, similar to rules governing South African media houses', and that access to credible news should be considered as a human rights issue, not only as a matter of commercial competition. X was a notable absentee among the digital platforms represented, which included Meta, Google and Microsoft.

Another area addressed was the impact that AI could have on the information system, and the potential for algorithmically enforced bias. Some newsrooms are, however, embracing the potential of Generative AI to enhance and disseminate their own news production. Daily Maverick Summaries, for example, uses AI to generate headlines and one-paragraph synopses of their longer articles.

Harassment of journalists – online and physically – continues to increase, with women journalists experiencing the brunt of this. SANEF said they were 'horrified' by the growing trends, which they said were aimed at stopping journalists from reporting on important stories. Bongani Mbatha, a veteran photojournalist, was murdered in July 2023, the first killing of a journalist since 2014, although there is still no clarity on the perpetrator or motive behind the shooting.

Some compromised news organisations continue to produce and disseminate misinformation, resulting in an unedifying to and fro between media titles, with the most obvious example being Independent Media's ongoing publishing of misinformation about News24 and Daily Maverick, apparently in retaliation for investigative pieces by those titles.[163]

Given that this year's *Digital News Report* shows that concern about misinformation in South Africa has grown to 81% (+6), well above the global average of 59%, this internecine warfare has the potential to erode trust in news, precisely the effect that bad actors intend. A possible corollary to this is that those expressing at least some interest in politics by South African consumers has dropped from 81% in 2021 to 70% in 2024, not ideal in an election year.

South African media appears to be on a cusp. Resources are strained, and business models under huge pressure, but at the same time consumers seem inclined to both trust reputable news sources and also be attuned, as active participants in the news ecosystem, to the potential for mis- and disinformation.

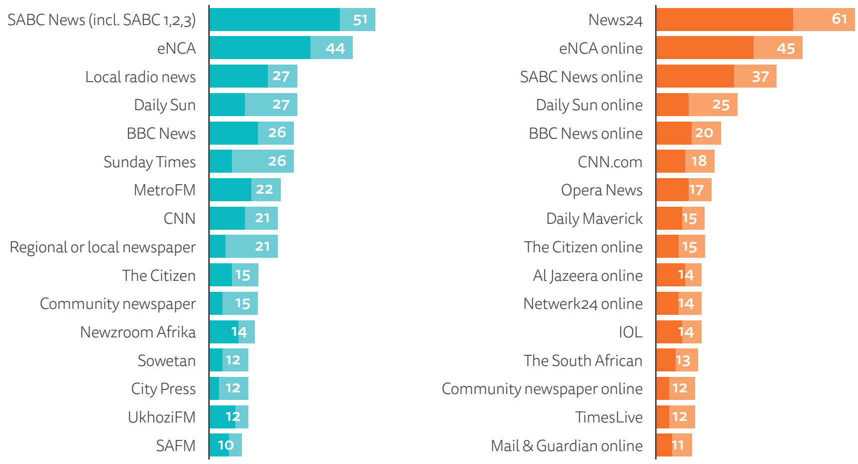
Chris Roper
Deputy CEO, Code for Africa

[163] https://www.voanews.com/a/south-african-media-outlet-files-complaint-over-op-ed-/7535501.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



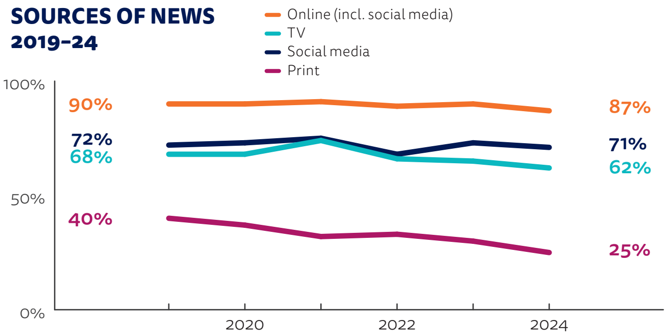
30% pay for **ONLINE NEWS**

PAY

CHANGING MEDIA

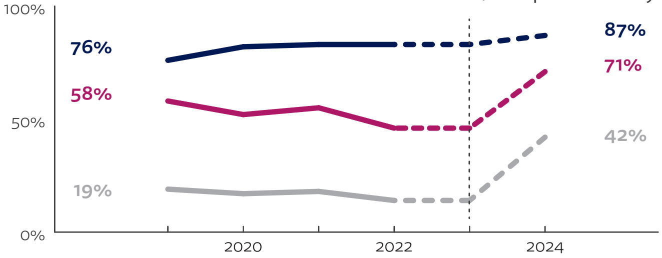
Use of TikTok is growing fast with 28% (+6pp) saying they use it for news. Online, print, television, and some other social media have all dropped as sources of news, with print now at 25%.

SOURCES OF NEWS 2019–24



DEVICES FOR NEWS 2019–24

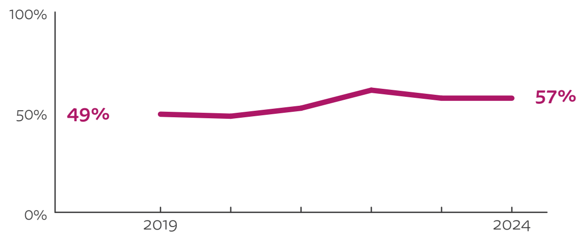
No data for 2023; question reformulated in 2024 to improve accuracy



TRUST

Trust in news stays level at 57%, after 2023's 4pp drop from 2022's high of 61%. Trust in news brands also appears to be stable in most cases, despite some high-level examples of conscious disinformation campaigns by Independent Media titles, as well as politically motivated attacks on the media. As always, trust and trustworthiness are not necessarily aligned.

OVERALL TRUST SCORE 2019–24



Proportion that trusts 'most news most of the time'

57% OVERALL TRUST =4/47 markets

PUBLIC OPINION ON BRAND TRUST

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

Brand	Trust	Neither	Don't Trust
BBC News	79%	12%	9%
City Press	67%	23%	11%
Daily Maverick	67%	22%	11%
Daily Sun	55%	22%	22%
eNCA	81%	12%	7%
EWN (Eyewitness News)	62%	25%	13%
IOL	63%	24%	13%
Mail & Guardian	71%	20%	9%
News24	83%	11%	7%
Regional or local newspaper	71%	19%	10%
SABC News	79%	10%	11%
Sowetan	61%	25%	14%
Sunday Times	75%	16%	9%
The Citizen	71%	20%	9%
TimesLive	69%	22%	9%

Q6_brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6–10 coded as 'Trust', 5 coded as 'Neither', 0–4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

RSF REPORTERS WITHOUT BORDERS	WORLD PRESS FREEDOM INDEX SCORE 2024	Score: 73.73	38/180

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

51% **SHARE NEWS** via social, messaging or email

TOP SOCIAL, MESSAGING, AND VIDEO NETWORKS

Rank	Brand	For News		For All
1	Facebook	51%	(-5)	74%
2	YouTube	47%	(+1)	76%
3	WhatsApp	46%	(-)	84%
4	TikTok	28%	(+6)	52%
5	X (formerly Twitter)	19%	(-6)	27%
6	Instagram	17%	(-)	41%

SECTION 4

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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Selected publications

BOOKS

Avoiding the News: Reluctant Audiences for Journalism
Benjamin Toff, Ruth Palmer, and Rasmus Kleis Nielsen published with Columbia University Press)

Hearts and Minds: Harnessing Leadership, Culture, and Talent to Really Go Digital
Lucy Kueng

Worlds of Journalism: Journalistic Cultures Around the Globe
Thomas Hanitzsch, Folker Hanusch, Jyotika Ramaprasad, and Arnold S. de Beer (eds) (published with Columbia University Press)

NGOs as Newsmakers: The Changing Landscape of International News
Matthew Powers (published with Columbia University Press)

Global Teamwork: The Rise of Collaboration in Investigative Journalism
Richard Sambrook (ed)

SELECTED RISJ REPORTS AND FACTSHEETS

What Does the Public in Six Countries Think of Generative AI in News?
Richard Fletcher and Rasmus Kleis Nielsen

'I'm Unable to': How Generative AI Chatbots Respond when Asked for the Latest News
Richard Fletcher, Marina Adami, and Rasmus Kleis Neislen (factsheet)

Race and Leadership in the News Media 2024: Evidence from Five Markets
Amy Ross Arguedas, Mitali Mukherjee, and Rasmus Kleis Nielsen (factsheet)

Women and Leadership in the News Media 2024: Evidence from 12 Markets
Amy Ross Arguedas, Mitali Mukherjee, and Rasmus Kleis Nielsen (factsheet)

How Many News Websites Block AI Crawlers
Richard Fletcher (factsheet)

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