



D1.2

Patterns in media consumption: regional models



Document information

Grant Agreement #:	101004488
Project Title:	EUROPEAN MEDIA PLATFORMS: ASSESSING POSITIVE AND NEGATIVE EXTERNALITIES FOR EUROPEAN CULTURE
Project Acronym:	EUMEPLAT
Project Start Date:	01/03/2021
Related work package:	WP1 Europeanisation: Lessons from Media History
Related task(s):	T1.2 Patterns in media consumption: regional models
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Status	Final
Submission date:	29/10/2021
Dissemination Level:	Public

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WP 1.2: Report on Media Consumption in European Media 1990-2020



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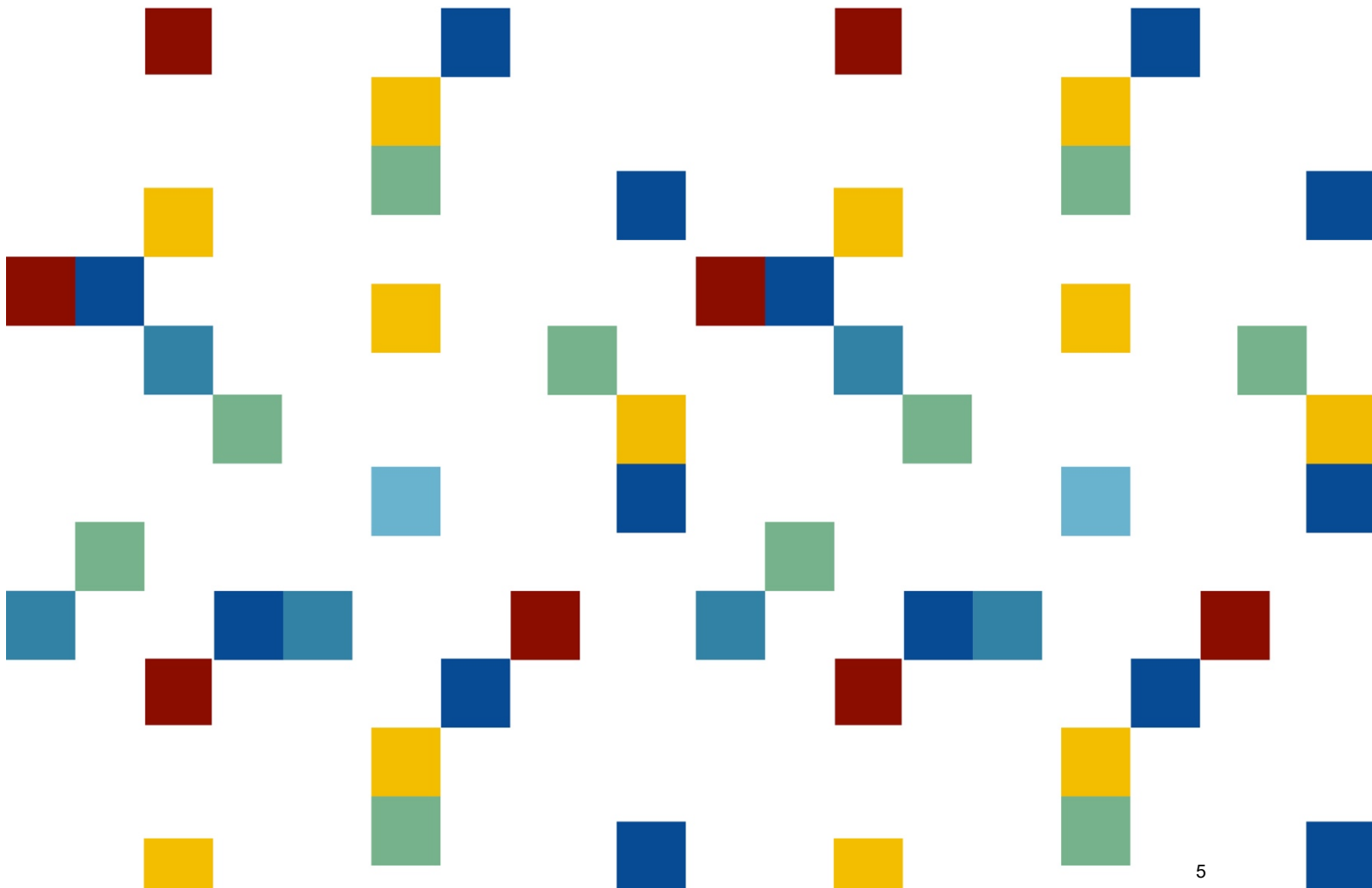
This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101004488

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1. The Changing Role of Press

When it comes to media cultural prevalence and consumption, the clearest pattern Hallin and Mancini (2004) noted is the difference between north and south: “Protestantism and industrialization occurring together in the north rather than the south.” According to their seminal research, “no country that did not develop mass circulation newspapers in the late nineteenth to early twentieth century has ever subsequently developed them...” (ibid.: 24, more details in the North – Western Regional Report). This pattern is true for the entire EU region. The reason behind this divide was that the press was perceived differently in the North and South of Europe. The popular working-class papers that shaped a culture of participation and information seeking did not spread southwards, where the press was instead dominated and directed towards the elites. Despite different starting points, the current research observes a common thread: daily readership has gradually transformed into weekly readership. Many reasons have been proposed to interpret this shift, among them the rise of the internet and the dominance of TV in daily life; regardless of reason, the trend seems to suggest that newspapers are still used to shuffle through and evaluate information. Five dimensions of the changing reading habits are discussed in detail below: the role of local press, the role of free press, trust in press trends, current readership patterns and the role of the online media.

1.1 Local Press

Language is an important factor in countries with two or three official languages (i.e., Ireland: English & Irish, Belgium: French, Dutch & German, Luxembourg: Luxembourgish, French & German; plus, regional official languages in Austria: Croatian, Slovenian, Hungarian), dividing media markets into separate segments and increasing cross-border influence from strong neighboring language media (i.e., the UK in Ireland, Germany in Austria, Belgium & Luxembourg, France & Netherlands in Belgium). In Ireland, under British rule until 1921 and part of the Commonwealth until 1949, newspaper development was delayed because of the country’s underdevelopment and the competition from British imports (209). Newspaper markets also vary in the balance of local, regional, and national newspapers. Some countries like the UK and Austria are dominated by a national or super-

regional press and no local papers and some others like Germany, have a combination of both. National newspaper markets tend to produce a more politically differentiated press (Hallin and Mancini 2004: 25).

Strong local press can sometimes operate competitively to national dailies readership. As Mancini & Gerli (2017) point out in Italy “local newspapers have a minor circulation and play a limited role in agenda setting. Nevertheless, some local papers do reach circulation levels as high as their national brothers. For example, in 2015, *il Resto del Carlino*, *La Nazione* and *Il Mattino* (...)”. Italians respond they prefer reading regional newspapers as often as those reading the national press, whereas in Portugal regional newspapers readers amount only half of those reading the national newspapers (Nossek et al. 2015). Regarding Spain and Portugal, according to Santana - Pereira (in Zielonka, 2015) “the difference between the two Iberian countries is due to the cultural and regional diversity of Spain as opposed to the strongly unified and much smaller Portugal, where the regional media do not have the same strength or *raison d'être*”. Nordic countries also used to have a strong regional press that is now on the decline.

1.2 Free Press

The landmark of the free press in Continental Europe was the 1995 launch of the first free newspaper in Stockholm. *Metro* shocked the established press at the time, even more so as it went on to become not only the newspaper with the largest circulation in Sweden, but also to succeed in 18 other countries. By 2011, *Metro* was the leading freely available newspaper in the United States, for instance. Despite its huge success, free press did not wholly dominate the European continent, or even the Nordic region. Neither *Metro* nor other free newspapers were ever introduced in Norway, for example. *Metro* itself closed in 2019, after 24 years, and other free newspapers similarly struggle, if they any longer exist at all. Yet, their impact has lingered, and probably more in Sweden than anywhere else (see Nordic Market Report).

Levels of readership increased in the early 2000's due the appearance of free press in Southern Europe, too. *Direct Matin*, *Metro* and *20 minutes* in France (Kuhn, 2013), *Metro* and *Leggo* in Italy (Mancini & Gerli, 2017), *20 minutos*, *Que!*, *ADN* and *Metro Directo* in Spain (OECD, 2010) soon found their audience. In Italy daily readership has been steadily growing since 2000 and free dailies strongly contributed to this increase adding about 6 million

readers from 2005 to 2009. Research has shown that ‘free newspapers’ were the most popular type of print press (Nossek et al. 2015) while focusing mostly on soft news and “apolitical” content (Kuhn, 2013). These newsreaders, however, were not converted into traditional newspaper readers and dropped reading newspapers altogether as soon as free Press was hit by the 2008 economic crisis (see Southern Market Report).

1.3 Trust in Press

To better understand the relationship between citizens and the press we have to take a look at the *trust in the press* indicator. *Trust in written press, particularly the mainstream daily papers, maintains a strong presence in the Nordic and even in the North – Western region.* On the contrary, press is not considered a trustworthy medium in Southern Europe. With the exception of Portugal, where 58% of the citizens say they trust the written press, *Southern Europeans appeared to be more skeptical about, if not avoiders of, the press than their northern counterparts.* Press trust in France and Italy scores medium. Cyprus reports low trust (40%), while only one in three citizens in Spain, Greece, Malta, Cyprus, and Turkey tend to trust the press (EBU, 2020). Perhaps the most pessimistic element is that, except for Turkey, distrust for the press continues to grow among all countries of Southern Europe.

The increased segmentation of parties and parallel media in North-Western Europe goes along with a growing percentage of the population expressing distrust in government institution and in mass media. Trust in the written press had risen to 47% from its low at 40% in 2012, while an equal share of 47% “tend not to trust” this medium. Looking at the countries in the North-Western European Region, we find that trust in the press is above EU28 average (47%) with the Netherlands (71%) and Austria (61%) taking the lead and two exceptions: East-Germany (44%) and the UK with a trust level of merely 23%. Already in the 2007 survey the UK had been on the low end of the trust scale, just before Portugal and Italy. We can assume that the cleavages over Brexit strengthened distrust in 2017. Since then, the Coronavirus pandemic heightened the polarising effect across Europe (see North – Western Market Report).

1.4 Convergence of reading habits

Overall, the biggest effect is a change of reading habits. Specifically, when we observe the

readership trends as reported in data surveys throughout the last 3 decades, it is apparent that while daily readership drops, weekly readership is rising in most cases until 2015 and then dropping a little from 2015 to 2019 (table 3).

Precisely, in France daily readership fell 8% in the last ten years, but weekly readership rose 10% from 2010 to 2019. A similar trend is reported for Spain, where daily readership fell from 26% in 2010 to 19% in 2019, while at the same time weekly readership increased from 18% in 2010 to 30% in 2015 and then decreased marginally from 2015 to 2019 by 2%. Similarly, in Italy daily readership fell by 9% the last decade, but weekly readership rose from 23% in 2010 to 37% in 2019. In Greece daily readership fell from 19% in 2010 to 7 % in 2015 to remain stable the following years. However, Greece nowadays scores the lowest daily readership in Southern European with only 7% of readers. Weekly readership in Greece grew from 2010 to 2015 by 8% to slightly fall again from 2015 to 2019 (5%). Portugal, which is the country with the lowest sales for the Mediterranean group, saw its daily readership increasing from 2010 to 2015 by 3%. However, daily readership decreased again by 6% during the following five years, whereas weekly readership rose 14% from 2010 to 2019.

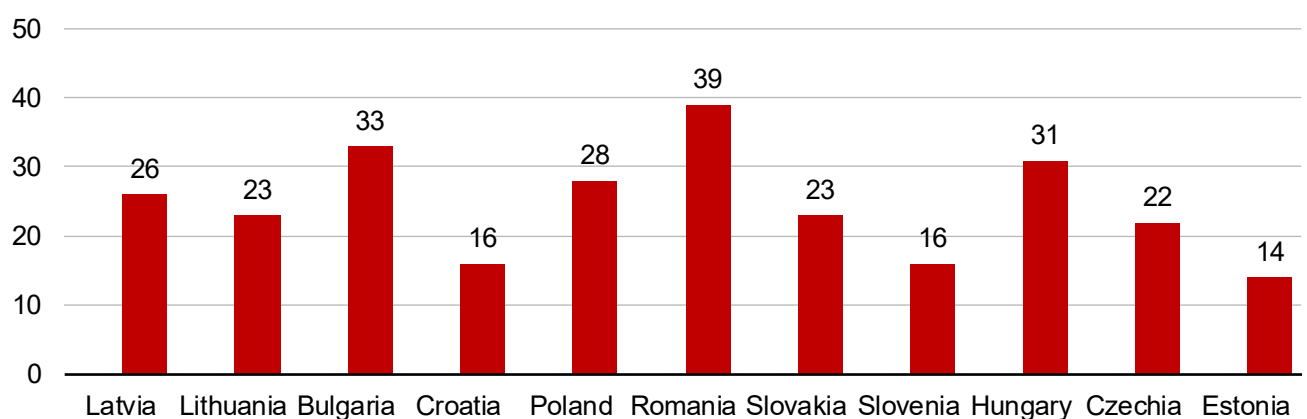
Table 1: Daily readership / Weekly readership of newspapers (% of population)

GEO / TIME		1995		2000		2005		2010		2015		2020/1	
		D	W	D	W	D	W	D	W	D	W	D	W
North – Western Region	Austria	NA	NA	56	32	NA	NA	58	33	49	36	40	38
	Belgium	NA	NA	37	27	NA	NA	39	30	37	35	41	28
	Germany	NA	NA	58	30	NA	NA	64	24	57	27	42	27
	Ireland	NA	NA	45	41	NA	NA	48	40	38	39	29	39
	Luxembourg	NA	NA	60	24	NA	NA	58	30	67	22	47	26
	The Netherlands	NA	NA	60	23	NA	NA	64	26	55	23	51	23
	UK	NA	NA	53	27	NA	NA	41	38	29	33	NA	NA
Nordic Region	Denmark	NA	NA	51.5	28	NA	NA	NA	NA	48	40	44	40
	Finland	NA	NA	68	23.3	NA	NA	NA	NA	67	30	59	36
	Sweden	NA	NA	70.1	22.9	NA	NA	NA	NA	66	33	59	38
Eastern Region	Bulgaria	NA	NA	NA	NA	NA	NA	10*	42*	10	37	5	30
	Croatia	NA	NA	NA	NA	NA	NA	22*	33*	24	35	25	26
	Czechia	NA	NA	NA	NA	NA	NA	19*	47*	15	47	14	35
	Estonia	NA	NA	NA	NA	NA	NA	41*	33*	44	31	31	35
	Hungary	NA	NA	NA	NA	NA	NA	24*	37*	22	30	16	32
	Latvia	NA	NA	NA	NA	NA	NA	17*	48*	21	43	14	34
	Lithuania	NA	NA	NA	NA	NA	NA	28*	45*	31	44	17	42
	Poland	NA	NA	NA	NA	NA	NA	10*	41*	12	41	9	36
	Romania	NA	NA	NA	NA	NA	NA	14*	27*	11	30	9	25
	Slovakia	NA	NA	NA	NA	NA	NA	22*	48*	19	37	16	30
	Slovenia	NA	NA	NA	NA	NA	NA	35*	37*	33	31	28	33
Southern Region	Cyprus	NA	NA	NA	NA	NA	NA	19	24	14	22	11	14
	France	NA	NA	28	39	NA	NA	31	16	27	31	22	22
	Greece	NA	NA	18	27	NA	NA	19	19	7	27	11	23
	Italy	36	50	28	40	NA	NA	29	23	22	36	20	39
	Malta	NA	NA	NA	NA	NA	NA	25	11	23	25	25	28
	Portugal	39	47	20	32	NA	NA	23	20	26	47	23	34
	Spain	NA	NA	NA	24.5	38	NA	26	18	22	30	13	28

Sources: Standard Eurobarometer 54 Autumn 2000, 76 Autumn 2011, Standard Eurobarometer 84 Autumn 2015 Media Use, Standard Eurobarometer 92 Autumn 2019, Highlighted data for 2013. (*): data for 2011.

In Spain, Italy, and Portugal one in three citizens continues to read newspapers on a weekly basis. For France and Greece this number is lower, namely one in four in France and one in five in Greece. It can be argued that the penetration of Web 2.0 and faster internet connections, as well as the economic crisis were the principal factors that led to lower newspaper consumption. On the other hand, newspapers in Southern European countries were merely addressed to the respective elites and not the wider public. (see the Southern Europe report).

Chart 1: Percentage of people saying: “Never read written press”

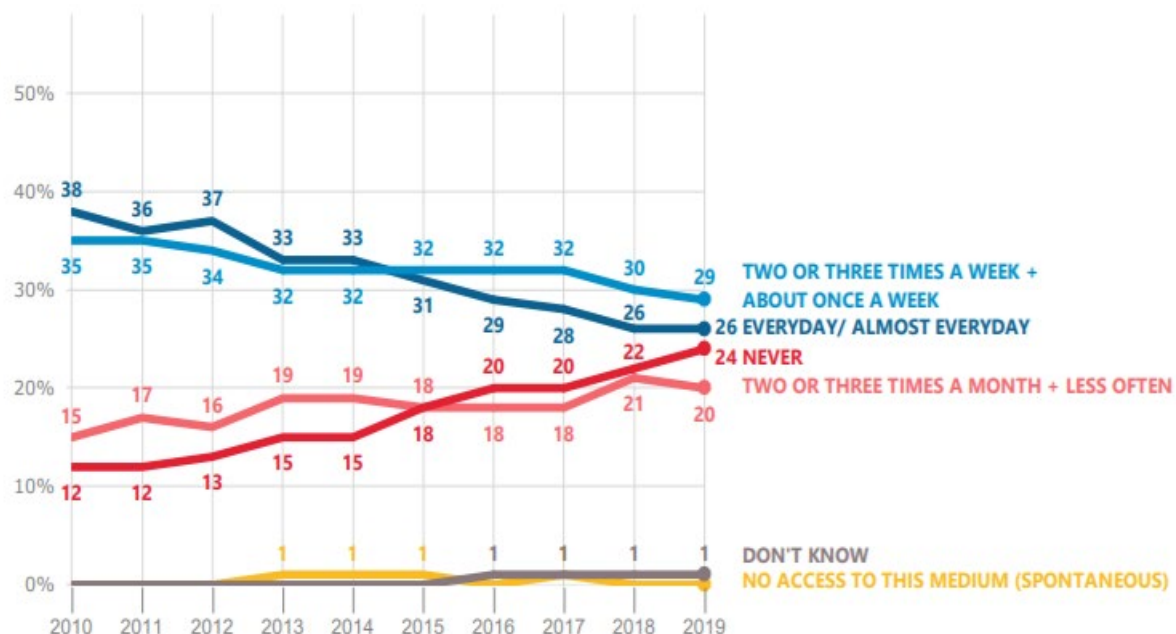


Source: European Commission (2019). *Media use in the European Union. Standard Eurobarometer 92, autumn 2019.*

However, a longer-term analysis for Eastern Europe shows that it continues to lose readers: since autumn 2010, the proportion of respondents reporting that they read the written press at least once a week has fallen by 18 percent (from 73% to 55%).” With that tendency in reading written press, it comes as no surprise that the daily average circulation in most of the countries in the region is dropping. That is a clear mark of the situation in the press market - people are reading newspapers, but not on paper. Digital platforms are very quick in delivering the news in your pocket - literally. Most of the readers use their mobile devices to get everyday news as they happen. But that is not the situation when we focus on weekly newspapers. The weekly newspapers have a broader readership than the dailies. The weekly newspapers are

not competing with digital media on the grounds of speed in delivering the news, as they offer readers a deeper analysis and more details about what's happening in the world. The weekly readership of newspapers is higher than the one of dailies in all countries in the region except for Estonia (2013, 2015), but in 2019 the situation has changed. The biggest difference - 6 times more - is in Bulgaria in 2019. An interesting fact is the number of people in those countries who answer with "Never" to the question: Could you tell me to what extent you ... read the written press?" (Chart 1). Over 30% answered with never read written press in Hungary (31%), Bulgaria (33%) and Romania (39%). Most of the people read written press in Croatia (only 16% never), Slovenia (16%) and Estonia (14%). That is to show that people use newspaper information but not by reading it on paper. And newspaper market shifts to digital each year as new generations are used to consuming information through their mobile devices.

Chart 2: "Could you tell me to what extent you read the written press?" (% - EU)



Source: European Commission (2019). Media use in the European Union. Standard Eurobarometer 92, autumn 2019.

As can be seen from the above Chart 2, over the last decade a convergence between those who never read/occasionally read newspapers and those who read daily, and weekly readers is underway. Namely, those who used to read newspapers habitually a decade ago are less inclined to do so today, while those who have never read a newspaper in their life

are increasing. Similarly, those who only read a newspaper on occasion (a few times a month or less) have also been increasing, bringing the four categories closer together than ever before.

This troubling development becomes clearer when one considers the social and demographic characteristics of the non-readers. The working class (33%) and the lower-middle class (25%) are the main group abandoning newspapers altogether; the interviewed people reporting to never read newspapers are both men and women, around the age of 25 or younger, house-bound (33%), unemployed (35%) and students (27%). With them, the retired (25%) and the manual labourers (26%) make up the rest of this category. To the contrary, the daily readers consist of the middle (36%), the upper-middle (41%) and the upper classes (38%). The most populous age cohort being the 55+ (35%), the daily readers consist of managers (37%), the self-employed (30%) and the retired (36%), with more than 20 years of education (34%). Gender, once again, seems to play no significant role here.

1.5 Role of the internet / online media

There is no consensus on whether the internet is complementary rather than a complete replacement for newspaper readers. Studies have shown that early internet users were also newspaper readers and radio listeners (Stempel, Hargrove, & Bernt, 2000). On the contrary, people who did not use the internet used electronic media instead (Stempel & Hargrove, 1996).

As we will explain further, the proportion of Europeans using the Internet every day or almost every day has risen almost continuously since the autumn 2010 survey (EB74), gaining a total of 24 percentage points (69%).¹ The question of trust is also important when we talk about information. Just under a third of Europeans (32%) say that they "tend to trust" the Internet. Although the proportion of people who tend to trust this medium remains unchanged since the autumn 2018 Standard Eurobarometer survey, levels of mistrust are increasing (55% "tend not to trust", +2 percentage points).

The websites of newspapers seem to fill the trust gap and transfer the trust in their print

¹ EuroBarometer 92, Autumn, 2019, page 53, <https://europa.eu/eurobarometer/surveys/detail/2255>, accessed on 13.08.2021

content to the content on their websites. In Greece, new native online media have become the most popular sources of news, whereas French, Spanish, and Italian online public spheres are still dominated by legacy media (Cornia, 2019; Antheaume, 2010). *La Repubblica*, *Il Corriere della Sera*, and *Il Fatto Quotidiano* websites in Italy, as well as *elmundo.es* and *elpais.es* in Spain and *lefigaro.fr* and *lemonde.fr* in France are among the top-ranking websites. However, advertising revenues appeared to be insufficient for sustaining traditional press outlets (WAN - IFRA, 2018). New business models combining paywall and subscription models still need time to be established while publishers in Southern Europe have had more difficulties in comparison to the north of Europe to convert free readers to paid online subscriptions, but we will examine this further under reading habits.

2 Radio still the most trusted medium

With the exception of Cyprus and Greece, all the countries in Southern Europe are below the EU28 median regarding the share of respondents who listen to the radio every day or almost every day (Statista, 2020).

As seen in Chart 3, radio listenership has slightly diminished in the course of 30 years' time, with the biggest drop in Nordic and Southern Europe from 2005 to 2019. For Southern Europe the biggest drop in radio listenership was noted in Portugal and Spain. In North – Westerner region there is also a drop during the same period, however not as sharp. On the contrary, in Eastern Europe and after a small drop, listenership in 2019 is back at 2000's levels.

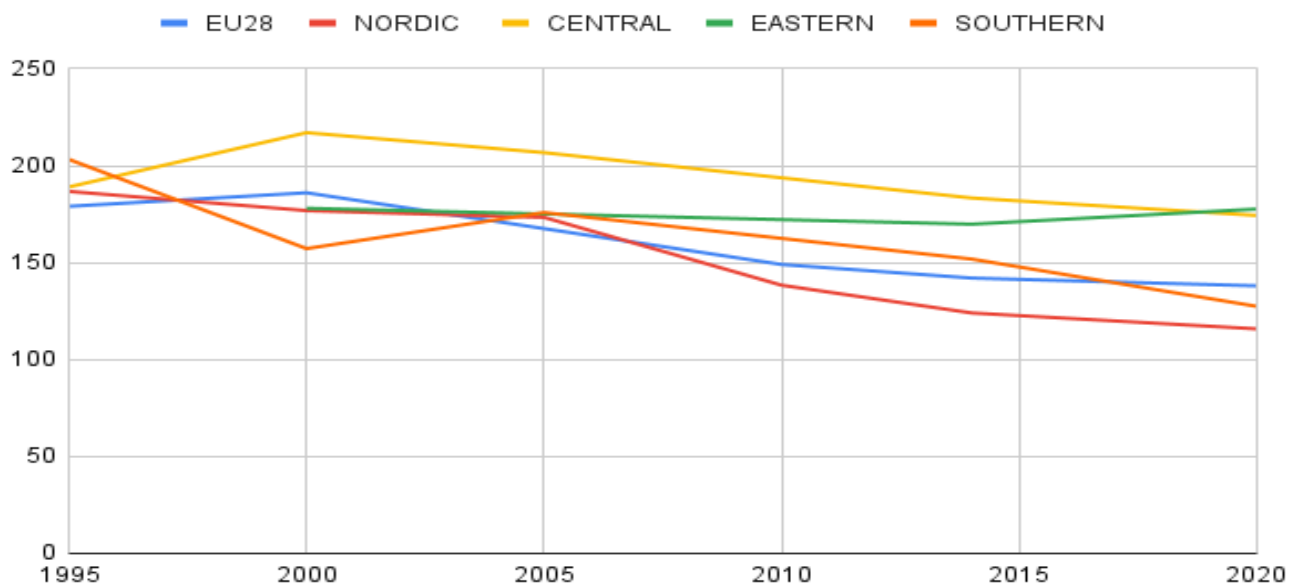
In 2019 the amount of daily radio listening in Southern Europe was on average 133 min. The Mediterranean trend is therefore a bit lower than the European median of 138 min. per day (EBU, 2020). Daily radio listening habits range from 84 min. for Portugal to 148 min. for Cyprus and 198 min. for Greece. For Eastern Europe, Slovakia is the only one with an increase in the minutes of daily listening. The biggest drop is in Hungary with 82 minutes less. In all four countries of the Nordic region listening time decreased from 2000 to 2019, with the biggest drop recorded in Denmark, corresponding to 90 minutes less listening time per day. Radio listenership in Finland has recorded the smallest drop. The developments in radio listenership have not been so dramatic in North – Western Europe

with all countries in this group well above the European average. Radio is most popular in Austria and Ireland, and the least in French – speaking Belgium, the Netherlands, and the UK.

PSM Listenership

In contrast to North-Western and Southern Europe, in each country of the Nordic region radio had been dominated from the start by a single public provider and network, handling both national and regional coverage. The development of digital radio, initially attempted, was halted in 2006, in the face of weak demand. New listeners have instead been reached by streamed radio or radio-on-demand. Daily radio listening has nevertheless remained high in the Nordic countries, although with Finland at a lower level compared to the others. Additionally, in all the Nordics, some three quarters of radio audiences listen to national radio. These numbers stand in a stark contrast to most other countries, including in southern Europe where public providers are in a weak position, while the share of the population listening to radio tends to hover around only two out of ten (see Nordic Region Market Report). Nevertheless, the trends displayed by all four countries feature a diversion in consumer behaviour from listening to the radio for around 200 minutes per day in 2000 to around 120 minutes in 2019. When it comes to public radio listenership the biggest increase in share is noted for the North – Western region from 2005 to 2014. This increase took place in all countries of the region, with the exception of Germany. However, the sharpest increase was noted for VRT in Belgium, which from 2005 to 2019 more than doubled its audience share. In Eastern Europe, only two countries saw the share of the public radio increasing in the last five years (see North – Western Region Market Report). In Latvia the increase was +15,6% and in Poland +4,3%. Although the data for Bulgaria is missing, the Bulgarian public radio (BNR) became part of the political battle in the country, which hints to an increased audience (see Eastern Region Market Report).

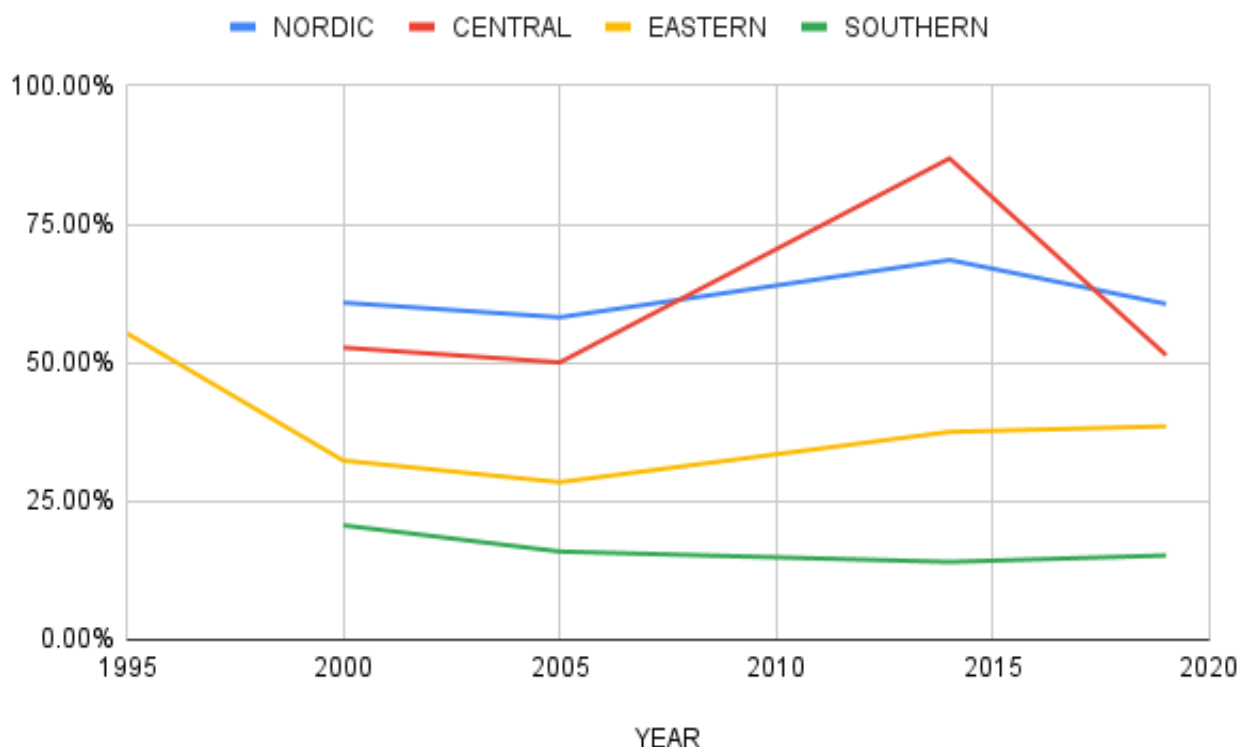
Chart 3: Radio listenership in minutes



Sources: a: O. Debande & G. Chetrit (2001) *The European Audiovisual Industry: An Overview* – 07/09/01 – Final version data for 1985 and 1999 respectively b: EBU, (2007) *EBU Members' Audience Trends 1994-2006*, Grand-Saconnex: EBU. c: EBU, *Audience Trends*, 2015, 2020 & 2021 (+) data for EU 15. *Null values (EU28 from 2000 to 2010, Central Europe from 2005 to 2010, Eastern Europe from 2000 to 2010, Southern Europe from 2005 to 2015) plotted.

On the 13th of September 2019 BNR broke its obligation to 24/7 broadcasts. A day earlier, a long-time radio host was taken off air by the general director, allegedly for her critical attitude to the prosecution service and to the only candidate for prosecutor general. The suspension caused a general outcry, and the host was restored to her job. BNR attracted political attention as with its entire program it reaches 17.1% of the audience.

Chart 4: Public Radio listenership (share %)



Sources: EBU Members' Audience Trends 1994-2006, Grand-Saconnex: EBU. c: EBU, Audience Trends, 2000, 2005, 2007, 2015, 2020

The loss of popularity for radio of the last ten years might be the side effect of the rise of streaming services and platforms; and even though terrestrial radio broadcasting is still the most important distribution platform, Charts show that online radio is no longer just a complement to FM but replacing it, especially when it comes to younger listeners (Cordeiro, 2012).

European Youths have listened to the radio 86 minutes per day which is nearly two times less than the average for all citizens in the EU (143 min.). This should stress the attention to the behaviour of and on ways to attract youngsters' attention towards digital platforms. For instance, concerning news consumption, podcasts seem more appealing to the youth (18 – 34 yrs.), while older age groups (35 – 55 +) still prefer listening to the radio (DNR, 2020). An interesting exception to the rule is Italy, where young people still appear to be avid radio listeners (EBU, 2020).

Although radio is less appealing than it used to be, it continues to be the most trusted medium for 24 countries of EU28, including the “media – skeptics” Cyprus, France, Italy, Malta, and Portugal; 57% of European citizens say they trust the radio the most (EBU, 2020; EC, 2019). Citizens in the Nordic region tend to trust radio the most, with 80% of the respondents in Sweden, 78% both in Denmark and Finland stating to trust the radio (EC, 2019).

Trust in radio is also very high in the North – Western region with 77% of the respondents in the Netherlands, 71% in Germany and 68% in Austria and Ireland. The lowest rate in the region is noted in the UK with 44% of positive respondents. Regarding Southern Europe, respondents in Portugal said they trusted radio as well as TV (both 67%). Trust in radio in Spain fell sharply from 2018 with 44% of citizens expressing distrust in 2019. Another notable exception is Greece, where citizens distrust all traditional media (62% distrust radio) and instead turn to the internet to get the news. Distrust in radio in Turkey is as high as in Greece (61%) with Turkish citizens turning to TV and the internet as more reliable sources of information (EBU, 2020). Since 2018 trust in radio has been growing in Romania (61%, +10 percentage points) and Bulgaria (51%, +6) in 2019 (See relevant regional reports).

3 Television still resilient in Europe

3.1 Audiences and consumption

When it comes to television, its consumption, market share and overall impact, research has shown that TV occupies an important part of the daily lives of Southern Europeans (i.e., Hallin & Mancini, 2004). More importantly this trend seemed to be on the rise until 2010, whereupon a reverse trend followed. For 2010 alone, the global average of TV viewing dropped slightly to 190 minutes per day. During the same year, the countries grouped into the Southern European model remained well above the global average. Moreover, in the next ten years TV viewing time continue to grow in all Southern European countries. In 2020 we find Portugal on top of the list for the Southern group with 349 min. of TV viewing, followed by Greece (318 min.), Turkey (293 min.), Italy (292 min.), Cyprus (239 min.), Spain (237 min.), and France (229 min.), (table 4).

TV viewing time is remarkably lower in the North – Western region with its peak between 2005 and 2010 from 195 minutes per day in the Netherlands (2005) to 242 minutes in the UK (2010). However, in 2020 viewership dropped in the Netherlands to 156 minutes and in the UK to 182 minutes. The exceptions for this region are Austria and Flemish Belgium, where viewing time continued to increase, in 2019 reaching 183 and 170 minutes respectively (table 4).

The increase in time spent on watching TV that occurred in the Nordic region from 2005 to 2010 appeared in most age groups across each of the Nordic countries (only young adults in Finland and Sweden went against the trend). In the years since then, however, average viewing time has declined quite markedly. The age group (4-9) peaked in 2010 throughout, after which its viewing time fell sharply, staying relatively unchanged only in the case of Finland. The age-pattern in Finland differs somewhat from the others in the way that young adults diminished their viewing time more dramatically after 2010, and for the eldest age group, where the tendency of watching TV has kept increasing more than in the other Nordics. Across all the Nordic countries, however, the viewing time of young adults having declined by 2020 to only some 25 – 40 minutes of watching television, while the age group +60 watched TV between 268 (Norway) and 324 minutes (Finland) on average. All countries display a lower average TV viewing time in 2020 compared to either 2015 or 2005, although the elderly viewers have gone the other way and

increased their viewing time (see Nordic Regional Report).

Romanians topped the Eastern European region with 329 minutes per day or 5 hours and 29 minutes watching TV in 2019. On the other end of the spectrum are the citizens of Latvia, who spend only 2 hours and 57 minutes in front of a TV set. If we compare the daily viewing time from 2015 to the one in 2019, we will see that nearly all countries have an increase in minutes, only Hungary (1,77%) and Poland (2.66%) have a slight decrease. The Internet didn't change our habit to watch TV. But for sure the Internet had changed and will continue to change our preferences on what to watch and on which channel (see Eastern Regional Report).

According to the Eurobarometer (EC, 2019) viewer numbers are relatively high for children and, in particular, the elderly in all the Nordic countries, while adolescents and young adults show a marked decline in time devoted to watching television. Age cohorts of the Southern Europeans most engaged with television viewing are those belonging to 40 – 54 years old (78%) and 55+ category (89%). Of these people, the crushing majority have received equal or less than 15 years of formal education. They mostly self - identify with the working class (84%). Their income doesn't seem to affect their TV viewing habits significantly, since the differences between those reporting difficulties to pay their bills (77%) and those who don't (76%) are almost not existent. What seems to have a significant effect is occupation or lack thereof: among those viewing TV the most are retired people (90%), house persons (83%) and the unemployed (77%). On the contrary, self – employed (71%), managers (68%) and students (51%) report the lowest daily consumption of TV on a TV set. The above statistics can be better explained if we take under consideration demographic parameters, social roles, and cultural factors in Southern Europe. Italy, Greece, Portugal, France, and Spain are the countries with the most aged population in the EU.

In each of the above countries almost one in five citizens is above 65 years old (Eurostat, 2020). In addition, senior citizens are often charged with providing childcare or even intensive childcare when it comes to Southern Europe, while their pensions and other benefits have withered away during the last economic crisis (Glaser et al., 2013). On top of this, senior citizens still haven't developed the necessary skills to facilitate their transition to digital media. Digital literacy among adults (and seniors) is still lower for Southern European member – states compared to the Northern ones (Eurostat, 2020). More precisely, 57% of French and Spanish citizens, 56% of Maltese, 52% of Portuguese, 51% of Greek, 45% of Cypriot and 42% of Italian citizens report they have the basic or above basic digital skills. The Netherlands ranks on top with 79% of citizens having at least the basic digital skills, followed by Denmark and Germany (70% each). Therefore, we can talk of a North – South digital divide. At the same time, one in every two young persons (15 – 24 years old) and two thirds of young adults (25 – 39 years old) report that they still watch offline television on a daily basis. As a result, we can assume that television is still a very resistant medium in Southern Europe. However, one question remains: *Why do Southern Europeans still watch more TV than their northern counterparts?*

There is a major disconnection in Southern Europe when it comes to the hours spent in front of the TV and the reported trust in it. Trust in TV has decreased in 14 EU countries, two of them from Eastern Europe - Poland, and Slovakia. However, 22 out of 28 EU member - states report high trust in TV with the highest reported in the Nordic countries (EBU, 2020). *On the flip side, six out of the eight countries of the Southern European model report low to no trust at all in TV:* Cyprus (48%), Turkey and Malta (45%), France (32%), Spain (29%) and lastly Greece (22%). Two notable exceptions are Portugal which reports high trust in TV (69%) and Italy just limping above the European average with 51%. These data lead us to an inevitable conclusion: the viewing habits of Southern European citizens have little to do with TV news content and more with the consumption of entertainment programs. This disassociation can be explained by a deep understanding that news in Southern Europe is not targeted towards the many but the few, or there is an increasing

news avoidance or Southern European trust less news that disseminated by mainstream media. Therefore, high viewership paints us a picture of a public trying to make sense of what is happening, a population wrecked by the economic crisis or a combination of two.

Table 4: TV daily viewing time (in minutes)

	GEO / TIME	1990	1995	2000	2005	2010	2015	2020	Change 2020/15 (%)
North – Western Region	Austria	NA	139	139	157	152	160	183	+14.38
	Belgium CFR	NA	192	197	224	203	NA	NA	
	Belgium VLG	NA	148.4	156	178	174	160	170	+6.25
	Germany	155	174	190	211	223	183	210	+14.75
	Ireland	NA	188	181	180	196	194	157	-19.07
	Luxembourg	NA	NA	144	NA	NA	NA	NA	
	The Netherlands	NA	151.1	163	195	191	190	156	-17.89
	UK	224	216	221	219	242	212	182	-14.15
Nordic Region	Denmark	NA	159	151	152	201	172	135	-22.09
	Finland	NA	154	168	169	178	179	167	-6.7
	Sweden	NA	NA	NA	164	183	173	118	-31.79
	Norway	NA	135	150	146	166	155	129	-16.77
Eastern Region	Bulgaria	NA	NA	NA	NA	NA	231	251	+ 8.66
	Croatia	NA	NA	NA	NA	267	265	268	+ 1.13
	Czechia	NA	NA	NA	NA	NA	206	206	0
	Estonia	NA	NA	NA	NA	NA	222	226	+ 1.80
	Hungary	NA	NA	NA	NA	NA	283	278	- 1.77
	Latvia	NA	NA	NA	NA	NA	211	177	-16.11
	Lithuania	NA	NA	NA	NA	NA	214	215	+0.47
	Poland	NA	NA	NA	NA	NA	263	256	- 2.66
	Romania	NA	NA	NA	NA	262	329	329	0
	Slovakia	NA	NA	NA	NA	207	228	238	+4.39
	Slovenia	NA	NA	NA	NA	186	205	227	+ 10.74
Southern Region	Cyprus	NA	NA	153	161	184	204	239	+17.6
	France	184	180	193	206	212	224	229	+2.23
	Greece	NA	194	191	245	274	269	318	+18.2
	Italy	191	213	207	237	246	254	292	+14.9
	Malta	NA	NA	NA	NA	NA	NA	100	
	Portugal	NA	192	NA	212	210	283	349	+23.3
	Spain	183	209	210	217	234	234	237	+1.28
	Turkey	NA	200	NA	216	230	243	293	+20.6

Sources: EAO - Trends in European Television 2006, vol. 2, EAO 2011 vol. 2, EAO – Yearbook 2020; EBU, TV Audiences, 2021

Till 2020 most of the viewers watched TV on a TV set. And that tendency will remain stable until the new generations will come on stage. The trend to move from TV set to Internet is here, we just do not know how quickly the TV set in all rooms part of will be the past (see also Regional Reports).

3.2 Public Service viewership in the digital age

The picture is less homogenous regarding Public Service Broadcasters. In the North – Western region for example, there have been dramatic developments in Austria and Ireland where in 2019 the PSB TV viewership share dropped to approximately half compared to of 2000. PSB TV share remained essentially unchanged for the other countries of the region in the 2000 - 2019 period. Ranging between 45 and 50 percent, PSB TV share is the highest in Germany and the UK (table 5).

A similar share of the population in the Nordic countries, around 80 percent, watched television around the turn of the millennium. The daily reach of public television has subsequently declined. This applies especially in Sweden, and almost to the same extent in Norway and Denmark. Finland has seen a smaller shift. In Norway, the decline came late (see Nordic Regional report). Meanwhile, it is worth noting that Norway invests more than the other Nordic countries in public service provision of news (see Nordic Region Market Report).

Regarding Southern Europe, Italian and French PSB receive more than a third of TV viewership. Smaller markets of Portugal, Greece and Cyprus follow close to 10% or even higher (table 5). Even though a slight downward trend was recorded in PBS popularity for most countries up to 2019, this was reversed during 2020. A notable exception is Spain where in 2010 the PSB had 35.6% in viewership, but this dropped to 23.3% in 2020. However, during the Covid – 19 health crisis citizens in most countries turned to public channels for reliable information (EBU, 2020). More specifically public service media (including radio) was the most trusted news source in Portugal and among the top 5 sources in Spain, Italy, and France. However, citizens in Greece and Turkey don't trust public television, perhaps a side-effect of their troubled

political histories (see Southern Regional Report).

Table 5: Public TV viewership share (%)

	GEO / TIME	1995^a	2000^b	2005^b	2010^c	2015	2019
North – Western Region	Austria	NA	56.6	48.5	38.8	34.1	30.5
	Belgium CFR	NA	23.2	18.2	21.2	21.9	24.7
	Belgium VLG	NA	31.7	34.6	42.5	36.7	38
	Germany	NA	43.1	43.9	43.4	43.9	47.3
	Ireland	NA	47.3	41	35.2	26.6	27.2
	Luxembourg	NA	NA	NA	NA	NA	NA
	The Netherlands	NA	36.4	33.3	36.5	30.6	34.5
	UK	NA	48.5	50.9	48.4	46.6	45.1
Eastern Region	Bulgaria	NA	NA	19.4	10.3	8.1	5.8
	Croatia	NA	NA	NA	38.2	28.4	27.1
	Czechia	NA	NA	29.8	28.3	30.4	30.1
	Estonia	NA	NA	NA	17.4	18.2	20.4
	Hungary	NA	NA	17.6	13.2	14.9	10.8
	Latvia	NA	NA	NA	13.6	12.4	12.5
	Lithuania	NA	NA	NA	12.1	10.3	14.9
	Poland	NA	NA	NA	39.8	29.4	28.6
	Romania	NA	NA	24.1	7.6	4.7	3.5
	Slovakia	NA	NA	25	16.1	12.7	13.9
	Slovenia	NA	NA	35	30.9	21.7	20.2
Southern Region	Cyprus	NA	20.4	20.8	19.7	16.9	12.0
	France	40.7 ^c	42.3	39.4	33.2	30.8	31.7
	Greece	8.0	10.6	15.4	15.0	7.7	9.7
	Italy	49	47.3	43.3	41.3	37.2	35.2
	Malta	90 ^c	60 ^c	31.2 ^c	29.5	NA	30.1
	Portugal	39.1 ^c	29.9	26.8	29.5	18.1	15.8
	Spain	37.4	43.9	42.9	35.6*	23.8*	23.3*
	Turkey	NA	5.9	NA	NA	10.0	12.4

Sources: a. Euromedia Handbook, 1997 b. EAO - Trends in European Television 2006, vol. 2, c. EAO 2011, C : Audience Trends, EBU 2012, EBU, 2021

*including regional channels

4. Europeans migrate on-line

Internet use has been steadily growing throughout the last decades in all the countries under examination. The countries with the most active users include the Netherlands (93.29), the UK (92.52), Spain (90.72), Estonia (89.53) and Germany (88.13). The lagging behind includes Bulgaria (67.95), Romania (73.66), Turkey (73.98), Portugal (75.35) and Greece (75.67). In 2019, 90.72% of Spanish people use the internet, followed by 86% of Cypriots and 85.78% of Maltese people (table 12). In general, internet users in Spain embrace the possibilities offered by the internet. More precisely, they value the internet as a source of information and entertainment as a way to find up-to-date content, and as a means for acquiring and developing new skills (Dunahee & Lebo, 2015). However, it is worth mentioning that as far as it concerns the role of the internet as a space of sociability, the majority of users appeared reserved, not wishing to share their emotional states online (Dunahee & Lebo, 2015), a trend- that as we will see in the following section-it is also manifested in the number of people participating in the social media.

For Greek Cypriots the internet is primary seen as a way of finding information about goods or services, exchanging e-mails, reading newspapers and magazines, and posting in social networking sites, while the percentage of users looking for news online at least daily almost doubled in 2012 (65%) compared to 2010 (34%) (Lebo, 2013). This increase in daily internet use in the country can be explained by the proliferation of online sources for news in Cyprus during the last few years, but this trend could also be interpreted in the light of the financial crisis, since in times of uncertainty there is a rise in news consumption, due to an increased need for orientation (Lebo, 2013). However, this consumption trend is still of valid today, since the majority of Cyprus' Greek-Cypriot community (69%) go online to look for news daily or several times a day (Lebo, 2018).

Table 12: Percentage of individuals accessing the internet

Country	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Austria	33.73	39.19	36.56	42.70	54.28	58.00	63.60	69.37	72.87	73.45	75.17	78.74	80.03	80.62	81.00	83.94	84.32	87.94	87.48	87.75
Belgium	29.43	31.29	46.33	49.97	53.86	55.82	59.72	64.44	66.00	70.00	75.00	81.61	80.72	82.17	85.00	85.05	86.52	87.68	88.66	90.28
Germany	30.22	31.65	48.82	55.90	64.73	68.71	72.16	75.16	78.00	79.00	82.00	81.27	82.35	84.17	86.19	87.59	84.17	84.39	87.04	88.13
Ireland	17.85	23.14	25.85	34.31	36.99	41.61	54.82	61.16	65.34	67.38	69.85	74.89	76.92	78.25	83.49	83.49		84.11	84.52	NA
Luxembourg	22.89	36.16	39.84	54.55	65.88	70.00	72.51	78.92	82.23	87.31	90.62	90.03	91.95	93.78	94.67	96.38	98.14	97.36	97.06	NA
The Netherlands	43.98	49.37	61.29	64.35	68.52	81.00	83.70	85.82	87.42	89.63	90.72	91.42	92.86	93.96	91.67	91.72	90.41	93.20	92.57	93.29
UK	26.82	33.48	56.48	64.82	65.61	70.00	68.82	75.09	78.39	83.56	85.00	85.38	87.48	89.84	91.61	92.00	94.78	90.42	90.69	92.52
Bulgaria	5.37	:	:	:	:	19.97	:	:	:	:	46.23	:	:	:	:	56.66	59.83	63.41	64.78	67.95
Croatia	6.65	:	:	:	:	33.14	:	:	:	:	56.55	:	:	:	:	69.85	72.69	67.10	75.29	79.08
Czech Republic	9.78	:	:	:	:	35.27	:	:	:	:	68.82	:	:	:	:	75.67	76.48	78.72	80.68	80.87
Estonia	28.58	:	:	:	:	61.45	:	:	:	:	74.1	:	:	:	:	88.41	87.24	88.10	89.35	89.53
Hungary	7	:	:	:	:	38.97	:	:	:	:	65	:	:	:	:	72.84	79.26	76.75	76.07	80.37
Latvia	6.32	:	:	:	:	46	:	:	:	:	68.42	:	:	:	:	79.20	79.84	80.11	83.57	86.13
Lithuania	6.43	:	:	:	:	36.22	:	:	:	:	62.12	:	:	:	:	71.38	74.38	77.61	79.72	81.58
Poland	7.29	:	:	:	:	38.81	:	:	:	:	62.32	:	:	:	:	67.99	73.30	75.98	77.54	84.52
Romania	3.61	:	:	:	:	21.5	:	:	:	:	39.93	:	:	:	:	55.76	59.50	63.74	70.68	73.66
Slovakia	9.43	:	:	:	:	55.19	:	:	:	:	75.71	:	:	:	:	77.63	80.47	81.62	80.45	82.85
Slovenia	15.11	:	:	:	:	46.81	:	:	:	:	70	:	:	:	:	73.10	75.45	78.89	79.75	83.19
Cyprus	15.26	18.82	28.32	30.09	33.83	32.81	35.83	40.77	42.31	49.81	52.99	56.86	60.69	65.45	69.33	71.72	75.90	80.74	84.43	86.06
France	14.31	26.33	30.18	36.14	39.15	42.87	46.87	66.09	70.68	71.58	77.28	77.82	81.44	81.92	83.75	78.01	79.27	80.50	82.04	83.34
Greece	9.14	10.94	14.67	17.80	21.42	24.00	32.25	35.88	38.20	42.40	44.40	51.65	55.07	59.87	63.21	66.83	69.09	69.89	72.24	75.67
Italy	23.11	27.22	28.04	29.04	33.24	35.00	37.99	40.79	44.53	48.83	53.68	54.39	55.83	58.46	55.64	58.14	61.32	63.08	74.39	NA
Malta	13.11	17.88	28.92	31.64	34.62	41.24	40.41	46.90	50.08	58.86	63.00	68.02	68.20	68.91	73.17	75.96	78.08	81.01	81.66	85.78
Portugal	16.43	18.09	19.37	29.67	31.78	34.99	38.01	42.09	44.13	48.27	53.30	55.25	60.34	62.10	64.59	68.63	70.42	73.79	74.66	75.35
Spain	13.62	18.15	20.39	39.93	44.01	47.88	50.37	55.11	59.60	62.40	65.80	67.09	69.81	71.64	76.19	78.69	80.56	84.60	86.11	90.72
Turkey	3.76	5.19	11.38	12.33	14.58	15.46	18.24	28.63	34.37	36.40	39.82	43.07	45.13	46.25	51.04	53.74	58.35	64.68	71.04	73.98

Source: ITU

According to the recent Digital Economy and Society Index (2019), Malta belongs to the European cluster with the most active internet users. In Malta, there is a growing percentage of internet users that go online for reading newspapers and magazines (from 49% in 2013 to 70% in 2019), while internet use for watching stream TV or videos has slightly decreased (from 64% in 2016 to 62% in 2018) (tables 13 and 14).

In France, the percentage of individuals using the internet has been doubled from 2005 to 2018 (from 42.87 % to 82.04 %). However, there was a twist in the country's population habits regarding the consumption of the internet. For seven years (2007 - 2014) France has the best performance in this indicator, with an ever-growing percentage of individuals using the internet. However, in 2015 the percentage of individuals using the internet fell to 78.01% compared to 83.75% the previous year. In the years to come, there has been a slow growth, while in 2019 the country has the same percentage of individuals using the internet as in 2014 (83.34% and 83.75%, respectively). The percentage of French people that go online in order to read news sites, newspapers and magazines has risen from 41% in 2013 to 54% in 2019 (table 13).

According to the latest data from WIP (2018), the majority of internet users (60%) go online to look for news daily or several times a day. In the meantime, according to Eurostat figures, the percentage of internet users that migrate online for watching streamed TV or videos has risen during the last years from 53% in 2016 to 55% in 2018 (table 14). Italians, Greeks, and Portuguese people use to a lesser extent the internet, compared to their Mediterranean counterparts. The percentage of individuals using the internet in Italy was 74.39 in 2018, whereas for the year 2019, 75.67% of Greeks accessed the internet and 75.35% of Portuguese people.

Table 13: Percentage of individuals using the internet for reading online news sites, newspapers, and magazines

	GEO/TIME	2013	2014	2015	2016	2017	2019
	EU 27 (from 2020)	47	51	53	56	60	62
	EU 28 countries (2013-2020)	48	52	54	57	61	63
North – Western Region	Austria	47	51	53	56	60	62
	Belgium	48	52	54	57	61	63
	Germany	41	54	57	56	63	58
	Ireland	NA	53	52	56	56	59
	Luxembourg	57	61	63	64	67	71
	The Netherlands	33	37	38	41	53	67
	UK	77	81	82	87	85	72
Nordic Region	Denmark	70	71	66	70	83	82
	Finland	79	78	82	80	84	81
	Norway	87	89	90	92	90	91
	Sweden	80	82	76	81	85	80
Eastern Region	Bulgaria	38	41	40	41	47	45
	Croatia	56	54	62	66	61	72
	Czechia	63	69	70	-	77	80
	Estonia	73	76	80	78	79	81
	Hungary	60	65	62	70	65	67
	Latvia	64	65	69	67	68	68
	Lithuania	62	68	67	69	72	74
	Poland	27	47	47	58	60	60
	Romania	29	38	37	38	44	40
	Slovakia	43	52	51	59	63	60
	Slovenia	57	58	56	60	61	63
Southern Region	Greece	56	57	55	70	76	75
	Spain	58	59	65	64	68	70
	France	41	39	42	48	53	54
	Italy	40	37	37	41	39	44
	Cyprus	48	50	57	56	65	70
	Malta	49	55	62	62	67	70
	Portugal	45	48	53	55	59	62
	Turkey	33	36	36	41	44	52

Source: Eurostat

Regarding Italy, since the country stands well in connectivity indicators (which means that infrastructural shortcomings are not an obstacle for the diffusion of internet technology in the society), a possible explanation for the comparative low percentages of internet users can be traced in demographic, economic and cultural factors. Italians visit the internet at a greater extent for watching streamed TV or videos (54% in 2018) than reading the news online (39% in 2017 and 44% in 2019) (tables 13 & 14).

In Portugal, during 2010 there was a large percentage of non-users (45.4%) who said they are not interested in the internet or do not find it useful (Lebo, 2012). Today even though the percentage of internet users has risen up, still the country's population has moderate internet consumption, compared to other countries. In the same vein, Greece falls behind the other countries under examination, as far as it concerns this indicator. The majority of Greeks use the internet for communication purposes, such as e-mail exchange and instant messaging (75.7% of users report they exchange messages on a daily basis), while 63.5% of internet users turning to the internet for news consumption on a daily basis, in order to read local, national, or international news (Tsekeris et al., 2020).

As far as it concerns Turkey, it seems that it has managed to follow the internet consumption trends of the European countries under examination. Even though, in the beginning there seemed to be a digital gap, compared to the percentage of internet users in other European countries, in 2010 only the 39.82 % of the Turkish people used the internet (a percentage that is lacking behind the average of the EU countries of this cluster). In 2019 the same percentage has risen to 73.98%. Turkey, now, seems to have found its position in the "EU team" with the lowest percentage of internet use.

Regarding the internet activities that the majority of Turkish people performed, according to recent data (in the first quarter of 2015), 80.9% of Internet users participated in social networks. This proportion was followed by reading online news,

newspapers, news magazines (70.2%), seeking health-related information (66.3%), uploading self-created content to any website to be shared (62.1%) and finding information about goods and services (59.4%) (Turkstat, 2015). In 2019, 51.2% of internet users among the individuals aged 16 - 74 interacted with public authorities over the internet for private purposes and there was also a noticeable increase in the use for internet for the purchase of goods or services (34.1%) (Turkstat, 2019).

Table 14: Percentage of individuals using the internet for watching internet streamed TV or videos

GEO/TIME		2016	2018	2020
EU 27 (from 2020)		54	59	:
EU 28 (2013-2020)		56	61	:
North – Western Region	Austria	54	59	:
	Belgium	56	61	:
	Germany	60	66	:
	Ireland	48	53	:
	Luxembourg	62	68	:
	The Netherlands	52	61	:
	UK	83	51	NA
Nordic Region	Sweden	82	81	86
	Denmark	83	85	87
	Norway	84	86	92
	Finland	81	85	90
Southern Region	Greece	78	85	:
	Spain	65	80	:
	France	53	55	:
	Italy	50	54	:
	Cyprus	62	70	:
	Malta	64	62	:
	Portugal	54	47	:
	Turkey	45	57	:

Source: Eurostat

4.1 Social media are here to stay

Social media among the Europeans in the countries under examination is steadily growing, although not with the same pace in all the countries. As we have seen in the previous section Spain has the biggest percentage of individual accessing the internet but stands in the middle as far as it concerns the percentage of people that state a daily (50%) or weekly (13%) use of social media, according to the latest data (table 15). However, in 2015 there was a significant increase in the daily use of social media (+18) compared to 2010, which is attributed to the political upheavals in the country, which had triggered the public's interest and the following exchanging of views via the social media (Newman et al., 2015).

On the other hand, Malta seems to be the leader on social media use, with 68% of its population stating in 2019 a daily use of social media, followed by Cyprus (63%), which as we have already seen has the biggest percentage of daily internet users. Cyprus is also known as a “social media island.” According to a study carried out by researcher and social psychologist Paul McEvoy, in 2017 the island had the highest percentage of Facebook users in Europe (94%), a trend that according to the author is highly associated with the social consequences of living in a closed society (Lebo, 2018).

France and Italy have the lowest percentage of daily social media use, since in 2019 only 47% of French people and 39% of Italians stated that they use social media on a daily basis. Regarding the low percentage of social media use in France, one possible explanation could be found in the French government's determination for stronger social media regulation over privacy matters, which has resulted in clashes with Silicon Valley CEOs and consequently, has affected the social media usage in the country compared to other European countries (Lebo, 2018). Despite of concerns related to the issue of privacy, social media are still prevalent among those aged 25 or younger, as 88% of them are regular users, whereas only 38% of those over 55 use social media (Lebo, 2018). In addition, according to Reuters Digital News Report (Newman et al., 2019) the Yellow Vests protests have boosted the use of social media for news (42%) in the country.

Table 15: Percentage of Daily /Weekly Social media users

	GEO/Time	2010	2015 *	2019*
	EU28 (2013-2020)		35/15	48/16
North – Western Region	Austria	14/20	28/24	47/25+
	Belgium	21/16	36/20	59/19+
	Germany	12/17	26/14	46/16+
	Ireland	24/22	47/14	65/17+
	Luxembourg	19/17	43/13	63/17+
	The Netherlands	30/22	53/16	64/16+
	UK	25/15	44/15	NA
Eastern Region	Bulgaria	NA	32/15	54/12
	Croatia	NA	37/11	53/11
	Czechia	NA	28/17	44/20
	Estonia	NA	42/11	55/12
	Hungary	NA	31/18	44/23
	Latvia	NA	44/12	55/11
	Lithuania	NA	38/12	57/10
	Poland	NA	28/20	39/22
	Romania	NA	31/13	48/12
	Slovakia	NA	32/18	52/11
	Slovenia	NA	32/13	46/13
Southern Region	Greece	13/9	36/12	53/10
	Cyprus	15/8	40/9	63/8
	Italy	15/9	31/18	39/21
	Spain	20/9	38/11	50/13
	Portugal	12/7	35/17	60/9
	France	16/8	36/10	47/9
	Malta	28/8	50/11	68/6

Source: Eurobarometer 76, 84, 92, (+): data for 2020

It is worth noting, that the same picture has been depicted by the historical data provided by Eurostat (time-period 2011-2019), regarding the percentage of Europeans that stated that they had been participating in the social networks in the last 3 months prior to the survey (table 16). The percentage of people aged 16-74 that participated in social networks in 2019, in the last 3 months prior to the survey, was 72% in Cyprus, followed by Malta (71%). Still, Italy and France have the lowest performance in this indicator, with 42% of Italians and 42% of French people to have participated in social media in the last three months upon the

year of quest (2019). The development of social media has been rapid in Turkey. While the country is lagging in terms of connectivity compared to more advanced economies, Turkey's youthful population structure makes it a very promising market for most social media applications and services (Telli, 2011). According to Turkstat (2015), in the first quarter of 2015, 80.9% of Internet users participated in social networks¹.

Table 16: Percentage of individuals participating in social networks 3 months prior the year of survey

	GEO/TIME	2011	2013	2014	2015	2016	2017	2018	2019
	EU 27 (from 2020)	36	41	44	48	49	52	54	54
	EU 28 (2013-2020)	38	43	46	50	52	54	56	57
North – Western Region	Austria	35	37	44	45	49	51	53	56
	Belgium	40	47	52	67	69	72	73	76
	Germany	42	42	42	57	50	51	53	53
	Ireland	40	48	50	53	58	59	60	64
	Luxembourg	46	57	60	68	67	68	64	63
	The Netherlands	46	55	59	59	62	67	66	67
Nordic Region	Sweden	54	57	65	62	70	71	70	72
	Denmark	55	64	66	65	74	75	79	81
	Norway	59	68	71	73	76	83	82	86
	Finland	45	51	56	58	62	66	67	67
	Iceland	72	79	83	NA	NA	89	91	92
Eastern Region	Bulgaria	30	37	40	42	45	50	51	53
	Croatia	32	38	40	45	50	47	54	58
	Czechia	27	36	40	41	45	48	56	59
	Estonia	37	49	51	56	57	60	62	65
	Hungary	51	56	60	61	66	65	65	69
	Latvia	55	54	53	58	57	60	61	65
	Lithuania	35	44	47	46	50	54	58	61
	Poland	36	35	37	41	44	48	50	53
	Romania	25	33	36	44	44	52	61	60
	Slovakia	48	49	50	54	57	59	60	59
	Slovenia	32	38	42	37	38	45	49	52
Southern Region	Greece	28	36	41	44	47	50	53	57
	Spain	35	46	51	51	54	57	58	59
	France	36	38	39	38	40	43	42	42
	Italy	26	32	36	38	42	43	46	42
	Cyprus	33	44	50	54	60	63	69	72
	Malta	45	51	53	60	64	70	70	71
	Portugal	32	44	47	48	52	56	59	60
	Turkey	NA	32	38	41	48	54	60	60

Source: Eurostat

5. Concluding remarks

Throughout the examined period several key trends can be identified that surpass the east-west and north-south divide. First, there seems to be a *convergence in the patterns of newspaper readership* between those who used to read daily/weekly and those who never/rarely read newspapers, with the first category being the most affected. Despite this change in newspaper readership, it appears that *radio and TV are more resilient media* and have maintained their audience throughout the examined countries. Especially during the COVID-19 pandemic, people seem to have turned massively towards public TV and radio stations for their information (EBU, 2020).

Social Media also played a significant part in altering consumption habits across the European continent. Throughout EU the *social media remain the least trusted news sources, with the notable exceptions of Greece, Turkey, and Hungary*. It is unclear to what extent the effects recorded in this study are mainly due to the shifting stages of privatization between the various countries. Namely, free press seems to have influenced a model where tidbits of news are consumed by the largest available audience, targeting at maximizing advertisement revenue to the detriment of informing the public (see Nordic media report). The result of this model was the preparation of an audience used to short and easy to digest news. Added to that, the personalization/localization process served to further segregate news from the audience, providing information relevant to the specific interest of the user. As a result, geographical (urban/rural) and pragmatic gaps have been observed in all countries, bringing the era of mass information to a close.

Regardless of press development stage, throughout the examined countries people are not willing to pay for better quality information, with the subscriptions limiting to less than 12% with the exception of Norway and Sweden.

Trust in media is another important parameter examined. Throughout the period, trust in *Radio and TV seems to be increasing, and retain high trust over a long period of time across most EU countries* (EBU, 2020). Among the most trusting are the Nordic countries, Germany, Belgium, the Netherlands. The least trusting are Greece, Spain, France, the United Kingdom

and Czechia. Social media, on the other hand, seem to be regarded as *less trustworthy* overall, with the exception of Greece, Turkey and Hungary. Political power, however, remain completely untrustworthy in the eyes of European people. This disconnects with authority, perhaps an outcome of decades of deregulation, crises, and poverty, leads to significant mistrust and suspicion when it comes to the news and press. In any case, there seems to be a correlation between trust and press freedom, with the countries enjoying an independent media landscape enjoying the most trust (EBU, 2020). Similarly, countries with low political pressures on press content enjoy higher trust in newspapers overall.

In conclusion, *trust in media seems to go hand in hand with the unequal development of certain countries, combined with an un-free political culture.* Greece (least trusting in national news and towards TV), Turkey, Bulgaria, and most of the Balkan states (least trust in Press), have all found different ways of placing more trust in social media as a way to gain access to non-established information. At the same time, EU in general distrusts social media the most as a news dissemination platform.

Ultimately, the question whether trust is a viable parameter when examining the news consumption comes to the fore. On the one hand, countries with high partisanship tend to understand questions of trust in the news in an “us versus them” mentality. On the other, the only viable answer to the question whether one trusts the news of any medium should always be “it depends” (see North-Western market report).

¹ According to Eurostat, for the same year the percentage of individuals that participated in social media in Turkey was 41

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Market Report on North-Western media



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101004488

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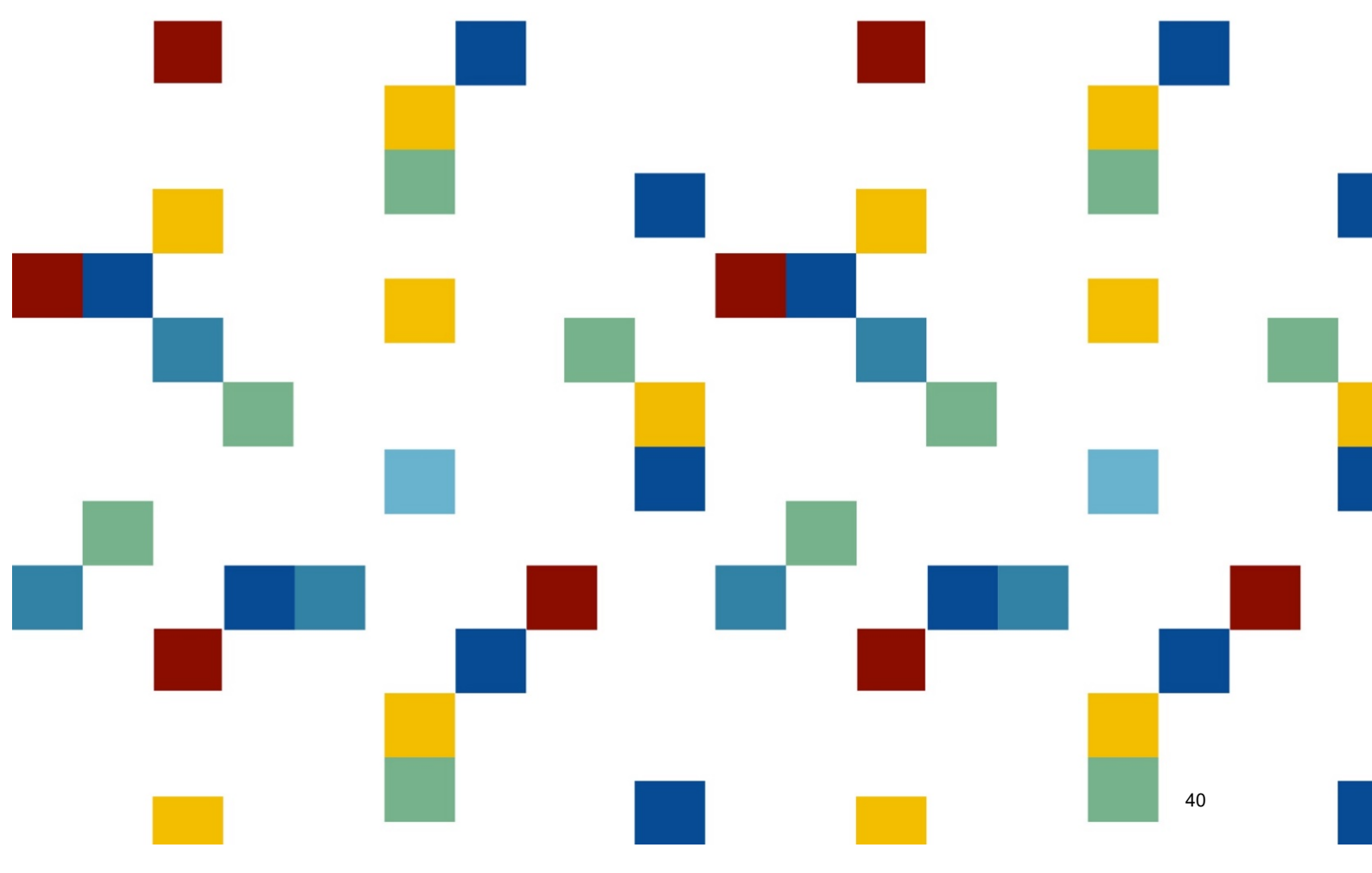


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1. Introduction

This report builds on the Region Report for North-Western Europe (WP1.1) and provides a secondary analysis of data on the production and consumption of media in the period 1990-2020, at national and regional level, based on institutional reports and scientific literature.

The period is characterised by two macro trends in European media systems. One is the deregulation of broadcasting and the entry of commercial providers of radio and TV services. This was triggered by the emergence of the new satellite and cable transmission technologies and the pressure by press publishers wanting to expand into broadcasting. In line with the general wave of neoliberal deregulation and privatisation, the 1980s saw the end of the monopoly of public service broadcasting (PSB), that was in place since the postwar years, and the start of the dual system, which is actually a triple system as it includes not only commercial but also community radio and television. Commercial providers focused their thematic and pay TV channels on the most lucrative segments of the TV market. Their number peaked in 2015, overall TV viewing time a bit earlier. The publicistic competition did not leave PSB unchanged, yet after an initial decline their viewership share remains astonishingly high across the region. Also radio use remained fairly resilient. More recently, broadcasting shifts to delivery over the Internet and from linear to on-demand (chapters 3 and 4).

The other major development is the popularisation of the Internet (chapter 5). The invention of the World Wide Web in 1989 made it more user-friendly and multi-media. Support for images, sounds and video led traditional media to experiment with distributing their content digitally. New forms of social media emerged, out of which centralised platforms grew that today dominate the global digital information and discourse space. The devices for accessing the Internet and digital media shrank from the desktop to the laptop computer and, after Apple's first iPhone in 2007, to the smartphone which is now the primary if not the only means to go online for most people globally.

The printed press was the first to be substantially affected by commercial TV and digitalisation. Circulation of newspapers and magazines dropped throughout the thirty years and ownership concentration increased. Publishers were early in complementing their paper products with online editions and launched a range of online-only titles, yet sustainable business models are still wanted (chapter 2).

Advertising goes where audiences are. Because the popularity of broadcasting remained stable, so did their ad revenues. The press in contrast saw an optimistic increase around 2000 and a sharp drop in ad money from 2010. By this time, the Internet had thoroughly taken hold. Reading newspapers, magazines and other news sites as well as watching TV and on-demand video had gained in popularity across the region, even more so than using social media. Automated individual targeting of ads based on extensive personal data profiles outcompeted ads in offline media. This most strongly affects press publishers who saw ads in print dwindle and the majority of digital ad spending captured by Google, Facebook and Amazon (chapter 6).

In a larger perspective, the period began with the opening of the Berlin Wall in 1989, the end of the Cold War and the beginning of the extension of the European Union to the east. It ended with the Covid-19 pandemic in 2020. In between, there was the global financial crisis of 2008 after the US mortgage bubble burst. The Islamic attacks in the USA in 2001 and in France and Belgium in 2015/2016 as well as the refugee crisis of those years nurtured xenophobia and redefined Europe's borders and its foreign policies. Russia's annexation of Crimea in 2014 was followed by a surge of pro-Kremlin propaganda. In 2016, the Brexit campaign and the US-presidency of Donald Trump, who routinely calls the media "fake news", eroded trust in the media and in politics and social institutions in general. This defamation and the flood of disinformation created the breeding ground for right-wing populism and conspiracy narratives.

Trust in the news had fallen in most countries in the region since 2015. Trust in public service media (PSM), particularly PSM news remains high throughout the region. Trust in media in general is also average or better, with the notable exception of the UK. Other than the BBC, the UK trusts neither its national news nor its newspapers or TV stations (chapter 7).

While distrust in media had particularly grown over issues of climate crisis and health, COVID-19 hit in 2020, leading to a shutdown of large parts of the economy and of public life and to 4.5 million deaths globally so far. The pandemic again drastically changed media habits. Live entertainment came to a stand-still and cinemas were closed. In 2020, PricewaterhouseCoopers' (PWC) „German Entertainment & Media Outlook" saw the largest slump in turnover in the sector since the start of the study in 2002. The non-digital segments dropped by 17.7 per cent while the digital grew by 10.9 per cent. Ad revenues dropped by 9.3 per cent. The winners were video-on-demand, gaming and e-sports and books in any form and shape. While the pandemic and the restrictions continue, PWC predicts a resurgence and catch-up effects already in 2021 and a lasting trend towards digitalisation and mobile devices (PWC 2021: 11 f.).

The insecurity over the crisis and the imposed lockdown at first triggered a surge in news consumption. People particularly turned to PSM as a source of trusted information (Grimberg 2020). However, a few weeks into the crisis, surveys already signalled a fatigue with news related to Covid (Baekdal 2020: 3). At the same time, an even greater number of people than before perceive established media as “Lügenpresse” (lying press) or “system press” (a term coined by the Nazis in 1933) and turn to “alternative media”. Research shows that up to a third of the population tends to believe in secret powers that control the world and use government, media and science to cover up their schemes (Roose 2020).

Platforms and particularly their algorithms have been blamed for polarisation and radicalisation in society. Yet measures of platforms to curtail and ban Trump, QAnon and other extreme reality deniers have not led to an improvement. Radical hate and conspiracy speech shifted to other platforms like Telegram but also to professional journalistic media on- and offline, growing in number of titles and circulation (Demmel 2021).

2. The press market

European newspapers had been “firmly rooted in history, culture, and politics” as de Bens (2007: 141) described in an overview of developments in the press industry. But this stable situation was uprooted in the recent three decades due to several challenging changes. Societal developments, shifts in audience and advertising preferences, the appearance of new media competitors and above all the spread of digital media and the convergence process turned the traditional business models upside down (Lund et al. 2011: 45). The following facts and data are a consequence of these developments, in which the European newspaper publishers were and are struggling to defend their market positions or find new ones.

During the thirty-year period from 1990 to 2020, the press market in the North-Western European Region has been in decline. While the number of daily, weekly and Sunday newspaper titles remained fairly constant (tables 4a and 4b), sales and circulation of dailies dropped constantly, rising dramatically to losses of more than twenty percentage points between 2005 and 2010 in the Benelux countries. The only exception seems to be Ireland where sales increased throughout the period, from 2000 to 2010 even by more than thirty percentage points, and started to decline only after 2010 (tables 1a, 1b and 2). Of those who still read newspapers, more seem to do so only once a week rather than on a daily basis (table 3).

The share of advertising expenditure going to press as compared to other media shows an increase in some countries of the region in the period of 2000 to 2005, with more than sixty per cent of ad money going to newspapers in the small markets of Ireland and Luxembourg, and a strong decline after 2010, most dramatic in the UK. Exceptions where ad expenditure in press remained fairly constant throughout are Austria, likely because of indirect subsidies through government ads, as well as Belgium and Luxembourg. While magazines receive roughly half of the ad money of newspapers, the decline here is more pronounced, even in the subsidised market of Austria, ending in mid to low single digits in 2019 (table 5). In the section on the advertising market below, we shall see that the ad revenues lost to print moved to the Internet.

These changes in newspaper circulation and consumption urged the publishers towards several adaptations. First, they moved from print to the Internet. While by 2000 nearly all newspapers had online editions, from 2005 there were more online than offline newspapers, in Germany more than twice as many in 2017. In the UK in 2010, the data show 99 offline titles compared to a staggering 1,410 online (tables 4a and 6). Second, they tried by either corporate expansion or by the launch of new products in the print markets to open new windows of opportunity. Powerful publishers as the German Axel Springer Group develop into large integrated media conglomerates by shifting from journalistic press to varied online businesses. Expansion also took the form of acquiring dwindling publishers in Eastern Europe. Examples are the Austrian Styria Group in Croatia and Slovenia and the German WAZ group in Croatia and Serbia. Third, they expanded into non-journalistic lines of activities (travel, books, exclusive consumer products) to compensate weakening ad sales.

Ownership concentration is one of the most important results of the market turmoils in the last three decades. In Austria, newspaper and news magazine markets are controlled by very few companies, resulting in spectacularly high media concentration ratios which derives from several waves of concentration up until the mid-1990s (Grünangerl/Trappel 2011: 78). Ten years later, the situation is similar, as the same authors report for the Media for Democracy Monitor 2021 (Trappel/Tomaz 2021: 31 ff.). The number of publishing companies in Germany had halved from the 1950s to 2011, and the number of published units (publizistische Einheiten), which is the number of newspapers whose content is composed by separated newsrooms, decreased from 225 in 1954 to 135 in 2008 (Marcinkowski/Donk 2011: 143). The five biggest publishing companies shared 41.3 per cent of the daily newspaper circulation in 2008 (Röper 2008, p. 421) which was reduced to 38.6 per cent ten years later (Röper, 2018). In the Netherlands, the overall market of

national, regional, free and specialist newspapers has been dominated for many years by three large groups (d’Haenens 2011: 216), a situation which even deteriorated, as today only two large players dominate both the national and regional newspaper markets (Vandenberghe/d’Haenens 2021: 277). The findings are similar in the UK, where the Murdoch family alone with its News International (renamed into News UK in 2013) held more than a third of the newspaper market followed by Daily Mail & General Trust and the Trinity Mirror Group (Humphries 2011: 327). The UK regional press is even more concentrated. Here, newspaper monopolies are the norm. The 2018 figures reveal that three companies – News Corp UK and Ireland, Reach PLC, and DMG Media Ltd – account for 72 per cent of all revenue for national newspaper publishers (Moore/Ramsey 2021: 474).

Looking at media ownership concentration in the press, we have to keep in mind that media concentration is measured in terms of single media sectors (print, television, radio and online media). However, changes due to the convergence of media markets, media offerings and end devices and therefore media cross ownership are neither taken into account by the current media concentration description, nor by media concentration law.

Table 1a: Number of annual newspaper sales (in million)

GEO / TIME	1990	1995	2000	2005	2010	2015	2017
AT	NA	NA	NA	633	NA	NA	NA
BE	532.34	480	467	438	350	NA	NA
DE	NA	NA	7399	NA	8010	NA	7075
IE	207.08	162	179	235	308	221	NA
LU	NA	NA	33	34	21	NA	NA
NL	NA	1464	1364	1189	927	877	845
UK	6995	6277	5811	5134	NA	NA	NA

Source: World Association of Newspapers, World Press Trends Database

Table 1b: Change rate of annual newspaper sales (%)

GEO / TIME	1990-1995	1995-2000	2000-2005	2005-2010	2010-2015	2015-2017
AT	NA	NA	NA	NA	NA	NA
BE	-9.83	-2.7	-6.2	-20.09	NA	NA
DE		NA	NA	NA	NA	NA
IE	NA	10.49	31.28	31.06	-28.25	NA
LU	NA	NA	3.03	-38.24	NA	NA
NL	NA	-6.83	-12.83	-22.04	-5.39	-3.65
UK	-10.26	-7.42	-11.65		NA	NA

Source: Calculations based on data in table 1a

Table 2: Dailies average circulation / Adult population (copies per thousand)

GEO / TIME	1990	1995	2000	2005	2010	2015	2017
AT	349	NA	NA	NA	409	406	NA
BE	175	167	NA	NA	179	NA	142
DE	341	314	NA	NA	270	223	202
IE	189	141	NA	NA	215	134	NA
LU	307	338	NA	NA	588	NA	NA
NL	306	310	NA	NA	332	224	196
UK	NA	NA	NA	NA	284	204	188

Source: World Association of Newspapers, World Press Trends Database

Table 3: Daily / Weekly readership of newspapers (%)

GEO / TIME	2000		2005		2010		2015		2020	
	D	w	D	W	D	W	D	W	D	W
AT	56	32	NA	NA	58	33	49	36	40	38
BE	37	27	NA	NA	39	30	37	35	41	28
DE	58	30	NA	NA	64	24	57	27	42	27
IE	45	41	NA	NA	48	40	38	39	29	39
LU	60	24	NA	NA	58	30	67	22	47	26
NL	60	23	NA	NA	64	26	55	23	51	23
UK	53	27	NA	NA	41	38	29	33	NA	NA

Sources: Standard Eurobarometer (eb54, eb74, eb84, eb94)

Table 4a: Number of daily newspaper titles

GEO / TIME	1990	1995	2000	2005	2010	2015	2017
AT	17	17	16	16	15	13	12
BE	35	31	28	28	23	NA	14
DE	356	411	382	368	353	343	327
IE	8	8	6	8	9	9	NA
LU	NA	5	5	6	6	NA	NA
NL	47	39	35	35	28	28	27
UK	105	100	104	106	99	104	99

Source: World Association of Newspapers, World Press Trends Database

Table 4b: Number of weeklies / non – dailies & Sunday newspaper titles

GEO / TIME	1990		1995		2000		2005		2010		2015		2017	
	W	S	W	S	W	S	W	S	W	S	W	S	W	S
AT	122	NA	128	NA	120	NA	110	NA	83	NA	76	NA	NA	NA
BE	NA	NA	NA	NA	NA	NA	NA	1	2	3	NA	NA	NA	1
DE	29	7	30	8	25	7	27	6	26	6	22	7	22	6
IE	48	6	103	4	61	5	111	10	1	9	74	7	NA	NA
LU	NA	NA	101	NA	10	1	9	NA	9	NA	NA	NA	NA	NA
NL	63	NA	63	NA	49	NA	NA	2	NA	0	NA	NA	NA	NA
UK	856	20	540	19	467	21	531	25	528	21	565	22	631	19

Source: World Association of Newspapers, World Press Trends Database

Table 5: Advertising expenditure in press (newspapers / magazines) (%)

GEO / TIME	1990		1995		2000		2005		2010		2015		2019	
	N	M	N	M	N	M	N	M	N	M	N	M	N	M
AT	40.70	19.20	39	16.50	31.00	28.00	40.76	18.35	40.72	13.98	36.94	10.03	36.13	7.4
BE	19.00	26.30	18.90	24.00	22.50	13.50	29.88	13.38	22.55	10.01	15.75	6.65	9.49	4.44
DE	33.00	13.00	31.00	10.00	44.00	23.70	43.07	17.88	33.92	13.64	25.13	10.77	17.87	7.85
IE	36.00	3.00	31.00	3.00	55.30	2.10	56.96	2.42	44.59	1.6	24.31	2.16	15.09	0.9
LU	NA	NA	74.00	NA	65.60	5.30	NA	NA	61.72	6.91	54.94	5.46	46.04	4.53
NL	55.00	NA	37.00	19.50	23.20	21.50	40.35	21.98	27.52	13.16	14.95	8.63	9.38	5.57
UK	37.70	14.30	35.60	14.30	40.70	16.40	34.86	13.44	22.62	7.52	10.86	3.62	4.83	1.64

Sources:

1990-2000: World Association of Newspapers, World Press Trends Database

2005-2019: World Advertising Research Center (WARC), in: EAO Yearbook 2020

Table 6: Number of daily newspaper websites (online editions)

GEO / TIME	2000	2005	2010	2015	2017
AT	15	16	15	14	15
BE	18	18	14	NA	18
DE	249	384	661	691	699
IE	3	5	NA	62	NA
LU	4	12	NA	NA	NA
NL	35	37	30	31	30
UK	97	NA	1,410	NA	NA

Source: World Association of Newspapers, World Press Trends Database

3. Radio

Radio in the North-Western European countries developed mostly, like TV, within the so called dual system of public service and commercial channels. The only exception is Luxembourg, where a commercial-only model was established.

The liberalisation of broadcasting led to an increase of the number particularly of commercial radio enterprises, likely reaching its peak in most countries of the region around the turn of the century. By 2010, the number of stations had started to drop in most countries, with a delay in Austria which was late in liberalisation. The UK which was early and peaked in 2010 at the highest level in the region (table 7). The number of employees in the radio industry from 2010 to 2018 dropped even more than the number of stations, indicating that many of the commercial stations relied on computer-generated playlists while saving on personnel. The only exception seems to be Austria where a comparably small number of commercial stations might be counterbalanced by an increase in personnel at ORF (table 8).

Data on listening time and radio audience are too patchy to draw any robust conclusions but seem to indicate that both remain fairly stable over the thirty-year period and across the region (charts 1 and 2). While listenership seems to have peaked in 2014 followed by a severe drop, the numbers in 2019 are everywhere similar to or higher than those in 2000. This is also what the EBU (2007) noticed, as it found a great diversity in terms of audience shares and overall radio listening.

The stability of radio consumption seems to be confirmed by the share of advertising expenditure it receives. This shows only minor fluctuations, with peaks between 2000 and 2015 in all countries except Austria where ad money in radio peaked in 1990 and dropped continually by more than fifty per cent until 2019 (table 9).

As the figures in table 11 show, radio is still a relevant mass medium in the North-Western European Countries, or – as Kleinsteuber puts it – a “resilient medium” (Kleinsteuber 2011: 61). He claims, that due to low access costs and the ability of radio to reflect the high diversity in Europe it is defending its place in the media market. The competition between the public model (which is a genuine European invention) and the commercial model (which can be seen as a US import) is quite balanced (ibid.: 68). In contrast to the notion of the dual system, Kleinsteuber refers to a three pillar system, as he includes community radios. Because the landscape of those is even more divers and oscillating and regulation for many years was absent, it is extremely difficult to get reliable data in this field. Nevertheless, community radios play a relevant role in the market as they – due to low market entry costs and many enthusiasts working for them – cater for a diversity of interests and genres. (In order to get an impression, the [Cultural Broadcasting Archive](#) in Austria and the media server of the [Bund Freier Radios](#) in Germany are good starting points.)

Table 7: Number of radio broadcasting enterprises (both public and commercial)

GEO / TIME	1990	1995	2000	2005	2010	2015	2018	Change Rate 2018/10 (%)	
EU28 (2013-2020)						6243	5629		
AT	13	12			43	47	28	-34.9	
BE	252				225	145	154	-31.6	
DE	171	231	253		246	239	248	0.8	
IE	25	38			NA	NA	NA		
LU	4	20	24		9	8	8	-11.1	
NL	18	30	363		264	292	274	3.8	
UK		221	346		921	876	813	-11.7	

Source: EC, Eurostat, Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95)

Table 8: Number of employees working in the radio industry

GEO / TIME	2010	2015	2018	Change Rate 2018/10 (%)	
EU28 (2013-2020)		58,984	56,509	NA	
AT	445	585	515	15.7	
BE	575	380	340	-40.87	
DE	11,795	11,955	8,898	-24.56	
IE	NA	NA	NA	NA	
LU	NA	NA	NA	NA	
NL	4,830	3,192	2,681	-44.49	
UK	NA	5,807	6,743	NA	

Source: EC, Eurostat, Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95)

Table 9: Radio advertising expenditure (%)

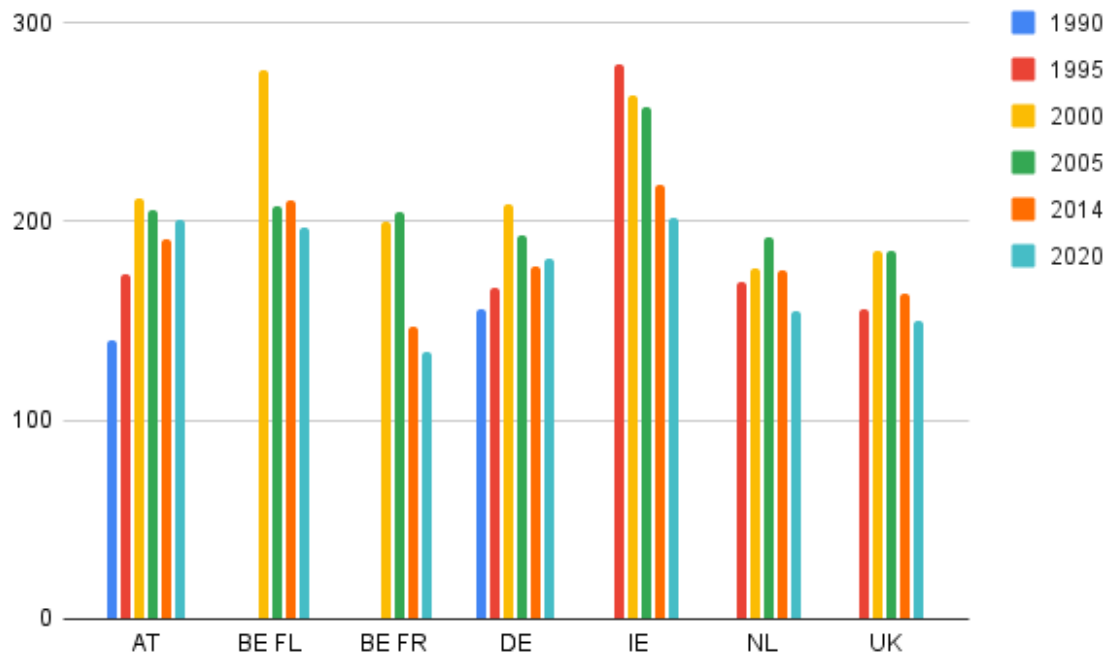
GEO / TIME	1990	1995	2000	2005	2010	2015	2019
AT	12.18	11.75	8.74	8.06	6.1	5.4	5.71
BE		8.97	9.75	11.36	11.02	12.45	12.82
DE	5.1	3.15	3.15	4.47	4.16	4.2	3.86
IE			7.82	8.32	8.68	6.76	10.95
LU			15		17.6	17	17.86
NL			8.16	7.13	6.21	6.49	5.87
UK	1.82	2.69	3.5	4.36	3.66	3.25	2.75

Sources:

1990-2000: European Communities (2003)

2005-2019: World Advertising Research Center (WARC), in: EAO Yearbook 2020

Chart 1: Radio daily listening time in minutes



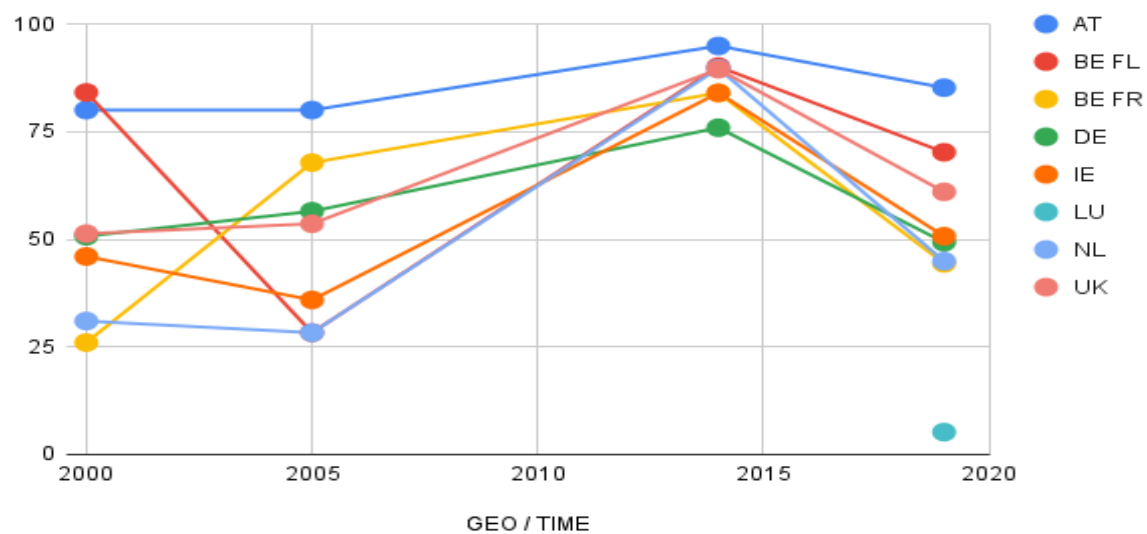
Sources:

1990-2000: European Communities (2003): 128

2014: EBU, Audience Trends Radio 2015: 7

2019: EBU, Audience Trends Radio 2020: 9

Chart 2: Public Radio listenership (%)



Sources: EBU, Audience Trends Radio, years 2000, 2005, 2015 and 2020

4. Television

From the mid-1990 onwards, TV, like radio, was based on the three pillars of public service, commercial and community stations. The exception is again Luxembourg where no PSM developed.

4.1. Audiences and consumption

Overall TV viewing time in the region peaked around 2005 and 2010 at values from 195 minutes per day in the Netherlands to 242 minutes in the UK. Exceptions are Austria and Flemish Belgium where viewing time continued to increase throughout the thirty-year period, in 2019 reaching 183 and 170 minutes respectively (table 12).

Table 10: TV daily viewing time (in minutes)

GEO / TIME	1990	1995	2000	2005	2010	2015	2019	Change Rate 2019/15 (%)	
AT		139	139	157	152	160	183	14.38	
BE CFR		192	197	224	203				
BE VLG		148.4	156	178	174	160	170	6.25	
DE	155	174	190	211	223	183	210	14.75	
IE		188	181	180	196	194	157	-19.07	
LU			144						
NL		151.1	163	195	191	190	156	-17.89	
UK	224	216	221	219	242	212	182	-14.15	

Sources: EAO, Trends in European Television 2006, vol. 2 and EAO Yearbooks 2011 and 2020

4.2. The rise of thematic channels

The new distribution technologies of satellite and cable and the ensuing deregulation led to a glut of new contenders for the potentially lucrative segments of the TV market. To provide the full range of programming in the sense of the Reithian remit of the BBC, i.e., to inform, educate and entertain, is quite costly. Therefore, most new entrants cater to special interests and thematic niches that are popular enough to attract audience that in turn attract advertisers or

to draw paying subscribers. The number of thematic TV channels throughout the region peaked in 2015 followed by a dramatic drop until 2019, ranging from 27 per cent in the UK to more than 94 per cent in Luxembourg (table 11).

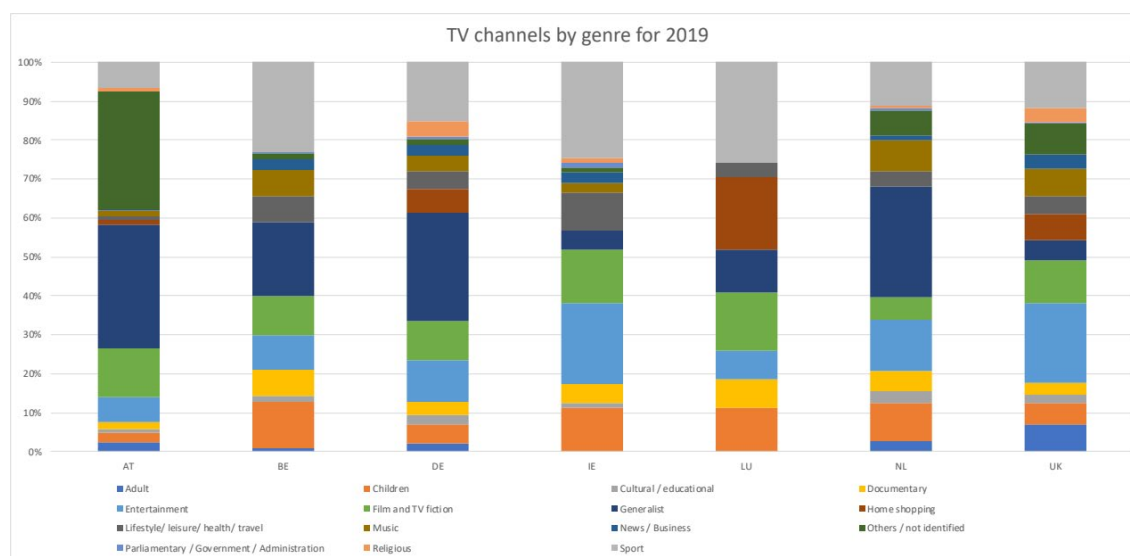
Looking at the distribution of the genres of these thematic channels in 2019, it seems to be most even in the UK, with the largest share of adult channels among the seven countries. The genre DNA looks similar to that of neighbouring Ireland, only that in that Catholic country there were no adult channels at all and only one religious channel compared to 17 in the UK. Larger clusters of generalist channels were seen in Austria, Germany and the Netherlands. Their numbers actually rose after the 2015 market consolidation, just as in the UK, while it fell in all other countries in the region (chart 3 and table 12c). Sports channels remained relatively strong in Belgium, Ireland and Luxembourg after consolidation (chart 3 and table 12d). Film and fiction channels had a ten to fifteen per cent share in all markets, with only the Netherlands having less. In Germany, their number continued to rise slightly after 2015 (chart 3 and table 12a). News and business channels were quite strong at the height in 2015, but had almost or even entirely disappeared by 2019, except for the UK with 17 channels remaining, Germany with 11 and Belgium with 9 (chart 3 and table 12b).

Table 11: Number of thematic TV channels (windows excluded)

GEO / TIME	2011	2015	2019	Change Rate 2019/15 (%)
AT	375	544	255	-53.13
BE	1,295	1,407	328	-76.69
DE	553	804	394	-51
IE	477	463	81	-82.51
LU	406	489	27	-94.49
NL	626	730	154	-78.9
UK	629	634	461	-27.29

Sources: EAO Yearbooks 2011, 2015 and 2019

Chart 3: TV channels by genre for 2019



Source: EAO Yearbook 2019

Table 12a: Film & Fiction Channels

GEO / TIME	2011	2015	2019
AT	27	35	32
BE	87	91	33
DE	27	37	39
IE	44	41	11
LU	21	20	4
NL	21	25	9
UK	54	51	50

Sources: EAO Yearbooks 2011, 2015 and 2019

Table 12b: News & Business Channels

GEO / TIME	2011	2015	2019
AT	18	25	1
BE	94	115	9
DE	36	41	11
IE	30	33	0
LU	49	51	0
NL	36	39	2
UK	32	34	17

Sources: EAO Yearbooks 2011, 2015 and 2019

Table 12c: Generalist Channels

GEO / TIME	2011	2015	2019
AT	44	48	81
BE	115	116	62
DE	50	46	110
IE	14	12	4
LU	51	55	3
NL	43	43	44
UK	17	13	25

Sources: EAO Yearbooks 2011, 2015 and 2019

Table 12d: Sport Channels

GEO / TIME	2011	2015	2019
AT	28	46	17
BE	125	151	76
DE	29	50	60
IE	27	29	20
LU	31	49	7
NL	29	33	17
UK	27	51	54

Sources: EAO Yearbooks 2011, 2015 and 2019

4.3. Public Service Broadcasting television

Given the number of commercial competitors, of audiovisual offerings on the Internet and other forms of audiovisual entertainment, particularly gaming, the appreciation of PSB television remains astonishingly high across the region. The most dramatic developments are seen in Austria and Ireland where in 2019 the PSB TV viewership share had dropped to half of its value in 2000, which at 31 and 27 per cent is still high compared to the Mediterranean countries. PSB TV share remained essentially unchanged in the other countries of the region in the 2000 to 2019 period. At between 45 and 50 per cent it is the highest in Germany and the UK (table 13).

The number of PSB TV channels was essentially unchanged throughout the region, with a slight peak in 2015 (table 14). The broadcast fee from 1990 to 2019 across the region rose roughly in line with the inflation rate. The fee was abolished in the Netherlands in 2000 and in Belgium in

2002, where PSB since then is being funded from the state budget. The rate of the fee which covers both radio and TV ranges from 160 EUR in Ireland to 300 EUR in Austria (table 15).

Table 13: Public TV viewership share (%)

GEO / TIME	2000	2005	2010	2015	2019	Change 2019/15 (%)	
AT	56.6	48.5	38.8	34.1	30.5	-10.56	
BE (CFR)	23.2	18.2	21.2	21.9	24.7	12.79	
BE (VLG)	31.7	34.6	42.5	36.7	38	3.54	
DE	43.1	43.9	43.4	43.9	47.3	7.74	
IE	47.3	41	35.2	26.6	27.2	2.26	
LU							
NL	36.4	33.3	36.5	30.6	34.5	12.75	
UK	48.5	50.9	48.4	46.6	45.1	-3.22	

Sources:

2000-2005: EAO Trends in European Television 2006, vol. 2

2010-2019: Eurodata, TV Worldwide, in: EAO Yearbook 2020

Table 14: Number of public terrestrial TV channels

GEO / TIME	1990	1995	2000	2005	2010	2015	2019
AT	2	2	2		3	7	3
BE	2	2					
BE(CFR)					3	6	3
BE(DSG)					1	1	0
BE(VLG)					4	4	4
DE	6	10	14		11	14	11
IE	2	2			3	9	7
LU			1		0	0	0
NL	3	3	18		3	3	3
UK	2	2			23	29	12

Sources:

1990-2000: European Communities (2003)

2010: EAO Yearbook 2010 vol. 2, p.120

2015: EAO Yearbook 2015

2019: EAO Yearbook 2020

Table 15: annual PSM Licence fee (in EUR)

GEO / TIME	1990	1995	2000	2005	2010	2015	2019
AT	169	212			277		300.03
BE	147	186	190	0	0	0	0
DE	76	100	105		215.8		210
IE		76	89		160		160
LU	0	0	0	0	0	0	0
NL		90	0	0	0	0	0
UK		104	171		145.5		171.55

Sources:

1990-2000: European Communities (2003)

2010: EAO Yearbook 2011 vol. 2, p. 32

2019: EBU-MIS, Licence Fee 2020

4.4. Commercial TV channels and their digitalisation

Most commercial TV providers distributed their programmes over satellite or cable. Their number peaked in 2015 (table 11). In the early 2000s, switchover of terrestrial broadcasting from analogue to digital (DVB-T) started. Switchover to digital transmission means more efficient usage of the electromagnetic spectrum, allowing more channels to be broadcast and in higher quality (HDTV), and it freed up spectrum, the “digital dividend”, that was auctioned off to mobile carriers. The number of commercial providers that successfully applied for a terrestrial licence also peaked in 2015, with by far the highest number in the UK (91), followed by Germany (27) and the Netherlands (15). Even though the following switchover from DVB-T to the more efficient version DVB-T2 from 2017 again increased the number of available terrestrial channels, commercial interest waned, indicating a consolidation of the market (table 18).

Pay TV refers to an access-controlled subscription-based TV service over any kind of distribution network. It started in the 1980s on cable networks and direct-to-home satellite services. While both of these require set-top boxes to receive free channels, pay TV channels were scrambled using various techniques (filters, inverting the video signal, adding an interfering frequency) and therefore required additional mechanisms in order to display the signal. In the beginning, this was used only for high-value content such as movies, sports and pornography, and the analogue conditional access techniques were easily defeated. Since the digitalisation of

the networks, including terrestrial broadcast, cryptography is applied to secure that only paying subscribers can access the signal, again requiring software or hardware keys in the receiver.

With improvements in compression (like MPEG) and the digital usage of telephone copper wires (Digital Subscriber Line, DSL), it became possible to provide TV signals over the Internet, i.e. IPTV. From the early 2000s, traditional telecommunication providers offered TV packages in addition to telephony and Internet, while cable providers offered telephony and Internet in addition to TV over their digitalised networks. These services were branded as “triple play”, and in media science they were termed “convergence”. Consumers access these services either directly on their computers as OTT (over-the-top, i.e. over the Internet, without control by the provider of the physical distribution infrastructure as in the case of IPTV) or on hybrid “smart” or “connected TV” sets, devices with the look and feel of a traditional TV receiver, operated with a remote control, but connected to the Internet and therefore offering additional interactive services like Video on Demand (VoD) and Electronic Programme Guides (EPG), including over the Hybrid broadcast broadband TV (HbbTV) standard (for the rapid growth of Smart TV households, see EAO Yearbook 2014: 85).

The availability of TV signals over the Internet, in the USA led to a growing trend of “cord-cutting”, i.e. consumers cancelling their cable or other pay-TV subscriptions. A similar if less pronounced trend can be seen in Europe from about 2015 (tables 18 and 19 and chart 4).

The North-Western European region shows diverse patterns of TV reception depending on market tradition and geography. The small and densely populated Benelux countries Belgium, the Netherlands and Luxembourg have the most extensive cable infrastructure in the region. 78.5% of Belgian households had analogue and 31.8% had digital cable in 2011 compared to only 8.3% with DTH satellite. There were 67.1% of households with broadband connections. There were 22.5% of households with IPTV and 23.4% with pay IPTV subscriptions. The telecom operator Belgacom has its own platforms and became an important competitor for the cable operators. It launched a package of IPTV channels in 2005 and announced that it had 1.211 million subscribers in December 2011. While 54.2% of Belgian households had broadband, only 5.6% used IPTV (EAO Yearbook 2012, vol. 1, p. 22 ff.).

The Netherlands was the second largest European cable television market after Germany, yet the cable subscription rate has been decreasing since its peak in 2000 (table 18). Pay DTH reached 10.3% of households in 2011. 2010 was marked by the launch of fibre to the home (FTTH).

76.7% of households had broadband Internet. 9.6% used IPTV over DSL and another 9.8% pay IPTV (ibid.: 239 ff.).

In Luxembourg, cable in 2011 supplied nearly two-thirds of households with the largest share (57.8%) digital. Satellite stood at 14.7%. 76.6% had broadband connections of which 6.2% used IPTV and 6.6% pay IPTV (ibid.: 210 ff.).

In Austria, satellite is the most important mode of television reception, reaching 49.3% of households in 2011, followed by cable TV (36.3%). Digital terrestrial television (DTT) was launched in October 2006, reaching 5.2% of households in 2011. Also, in 2006, A1 Telekom Austria AG launched the IPTV platform A1 TV in Vienna and announced that it had approximately 200,000 subscribers by the end of 2011. While 54.2% of households had broadband connections in 2011, only 5.6% used IPTV (ibid.: 9 ff.)

In Germany in 2011, 50.7% of households received television by cable (46.9% analogue, 11.3% digital) and 44.7% by satellite. While 61.1% had broadband connections, only 3.4% used IPTV and 4.2% had pay IPTV subscriptions (ibid.: 67 ff.).

In Ireland, Pay TV households had reached 81.2% in 2011, divided between satellite and cable. 56.1% had broadband of which 1.3% were using IPTV and 1.4% pay IPTV (ibid.: 174 ff.).

In the UK, analogue terrestrial TV broadcast was switched off in October 2012. Satellite (44.8% plus 39.5% pay DTH) and DTT (42.4%) were the most important platforms for watching TV in 2011, while cable homes (15.5%) were also almost 100% digital. 78.2% had broadband while IPTV stood at only 2.7% and pay IPTV at 2.6% (ibid.: 133 ff.). The post-Brexit and pandemic year 2020 saw a steep rise in subscription based VoD (SVoD) and a decline in television advertising (EAO Yearbook KeyTrends 2020-2021: 34, 46).

In 2020, revenues of commercial TV providers in Europe increased on average by 7% a year, while PSM saw a stagnation, i.e., in real terms, a decrease of revenues. Television groups based in the UK, Germany and France account for 56% of total revenue generated by the top 100 companies in Europe. Among these, US companies become increasingly dominant, controlling 26% of the SVoD market in 2019. This was boosted by the takeover of pay TV provider Sky by Comcast in 2019 and of other European TV groups by US companies. In 2020, the revenue share of US interests in Europe reached 37%, with Sky alone accounting for 21% (ibid.: 54).

Table 16: Number of terrestrial commercial TV channels

GEO / TIME	1990	1995	2000	2005	2010	2015	2019
AT	0	0	0	1	4	12	4
BE	2	3	0	2			
BE(CFB)					0	0	0
BE(DSG)					0	0	0
BE(VLG)					0	1	1
DE	4	20	60	0	22	27	6
IE	0	0	1	1	1	4	3
LU	1	1	1	1	3	6	2
NL		4	0	0	8	15	9
UK			3	2	67	91	85

Sources:

1990-2000: European Communities (2003)

2000: EAO Yearbook 2000

2005: EAO, Trends in European Television 2006 vol. 2

2010: EAO Yearbook 2010 vol. 2.pdf, p.120

2015: EAO Yearbook 2015

2019: EAO Yearbook 2019

Table 17: Pay TV subscribers (in thousand)

GEO / TIME	1990	1995	2000	2005	2010	2015	2019	Change 2019/15 (%)
AT	3,000	51,800			1,494	1,983	2,251	13.51
BE	103,300	371,600			4,409	4,609	4,667	1.27
DE	86,000	1,011,900			21,578	24,702	25,481	3.15
IE					1,120	1,140	1,137	-0.25
LU					147	148	153	2.9
NL	78,000	340,000			7,503	7,528	7,279	-3.31
UK	930,000	9,095,000			14,129	16,348	16,190	-0.97

Sources:

1990: EAO Yearbook 1990

1995: EAO Yearbook 1995

2010: IHS in: EAO Yearbook 2015

2015-2019: Ampere Analysis, IHS, OBS in: EAO Yearbook 2020

Table 18: Cable TV subscriptions (HH in thousand), analogue and digital

GEO / TIME	1990	1995	2000	2005	2010	2015	2019	Change 2019/15 (%)
AT	280	1,080	1,130	1,352	1,349	1,234	1,245	0.89
BE	3,370	3,630	4,050	4,009	3,500	3,009	2,839	-5.65
DE	8,100	15,800	20,620	20,291	20,626	18,360	17,063	-7.06
IE	390	460	660	576	490	366	280	-23.5
LU	100	130	120	152	122	95	80	-15.79
NL	4,980	5,770	6,390	6,021	5,334	4,450	4,060	-8.76
UK	160	1,220	3,550	3,310	3,778	3,727	3,687	-1.07

Sources:

1990-2000: European Communities (2003)

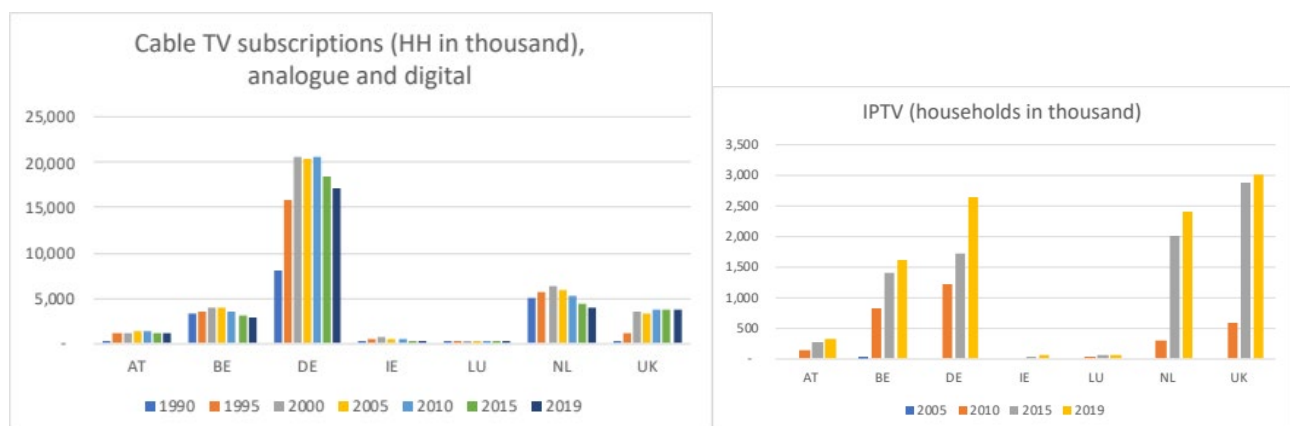
2005-2019: Ampere Analysis, IHS, OBS in: EAO Yearbook 2020

Table 19: IPTV (households in thousand)

GEO / TIME	2005	2010	2015	2019	Change 2019/15 (%)
AT		151	269	324	20.45
BE	33	839	1,414	1,630	15.28
DE		1,233	1,720	2,659	54.59
IE			45	75	66.67
LU		14	53	73	37.74
NL		302	2,014	2,421	20.21
UK		583	2,884	3,003	4.17

Source: Ampere Analysis, OBS in: EAO Yearbook 2020

Chart 4: Decline of cable TV and rise of IPTV



Sources: same as tables 18 and 19

5. The Internet shifts the paradigm

The numbers so far indicate that TV viewing time reached its climax around 2010 while the number of commercial stations, in a kind of optimistic delay, peaked around 2015. Meanwhile radio use remained fairly resilient and was complemented rather than replaced by podcasts. The press market had started its decline already in 1990, and the drop in circulation accelerated significantly from around 2005. The era of traditional 20th century media is coming to an end. The decisive factor in this is, no doubt, the Internet. Or more specifically, not the Internet as such but a phase in its development that started at the beginning of the 21st century and is characterised by mega-platforms like Google, Facebook, Amazon, and Netflix.

The Internet originated in research financed by the US military funding agency DARPA and conducted at both military-industrial labs and universities. In academia it met the scientific ethos of communism (“in the nontechnical and extended sense of common ownership” as US sociologist of science Robert Merton introduced the first of his CUDOS pillars of the ethos of science in 1942 (Merton 1973: 273 ff.), the hacker spirit of computer scientists (Levy 1984), the spirit of the student movement of 1968 and the ensuing social movements of the 1970s. Researchers organised themselves in working groups on mailing lists, which were joined under the Internet Engineering Task Force (IETF) in 1986. Technical standards were developed based on ‘rough consensus and running code’ and published in humble ‘Requests for Comments’.

The primary purposed of the Internet protocols was to interconnect computing resources. But researchers soon developed means of communicating with each other, to make their cooperation easier but also to socialise. Before the globally dispersed, yet highly centralised social network platforms that dominate the Internet today, several forms of public sphere emerged on the Internet.

Usenet was conceived by two graduate students at Duke University in 1979. Based on e-mail and the Network News Transfer Protocol (NNTP), it allows users to post messages in newsgroups organized into subject hierarchies (like sci.* (sci.math, sci.physics, etc.), comp.*, talk.* or alt.*). News content is exchanged among a large number of servers that store and forward messages to one another via news feeds, even to dial-up bulletin board systems beyond the Internet. Users access the network through a newsreader client, allowing them to subscribe to groups and participate in global discussions. Ronda and Michael Hauben (1996) documented

the world of Usenet and the roots of cooperative online culture in their seminal book on the Netizens.

The early, academic phase of the Internet ended in 1990 when the US National Science Foundation decided to cease funding its core infrastructure, instead supporting universities in buying Internet access from commercial providers. For people not affiliated with universities or research centres, formerly closed, proprietary services like America Online (AOL) were initially the only way to get dial-up access to the Internet. The oldest of them, CompuServe, founded in 1969, was the first online service in 1989 to offer Internet connectivity, albeit at first limited to exchanging e-mails between its own proprietary e-mail service and the Internet. In 1991, AOL also interconnected its closed network with the Internet for mail exchange. Prodigy in 1994 became the first of the early-generation dialup services to offer full access to the World Wide Web and web page hosting to its customers. In January of that year, US Vice President Al Gore pronounced his vision for the National Information Infrastructure (NII), not per chance in a speech at the Television Academy of the UCLA (Gore 1994). The “information superhighway”, a term coined by Gore, was widely seen as the promise to deliver 500 interactive TV channels. In 2000, AOL was the largest Internet service provider globally with 30 million customers.

At the end of the 1980s, physicist Tim Berners-Lee invented the graphical user interface to the Internet: the WorldWideWeb. Working at the public research centre CERN and in the self-evidence of the Mertonian sharing spirit, standing on the shoulders of those who had freely shared the preceding protocols of the Internet, Berners-Lee did so too. He also created the first server, the first web browser which became the universal interface to Internet services, the first weblog in November 1990 and the WWW Consortium (W3C) to keep his protocols open and consistent.

The number of weblogs grew rapidly and at the turn of the century they had evolved into a distributed yet highly interconnected communication space: the “blogosphere”. The multitude of individual blogs, which were now supported by content management systems (CMS), became interlinked by trackbacks and pingbacks that let one blogger and her readers know that another blogger had referenced her post and facilitated cross-blog conversations. Search, ad networks and analytics were provided across the entire blogosphere, allowing to report on news and trending topics. It is hard to estimate how big the global blogosphere was at its peak in the late 2010s. Technorati indexed about 112.8 million blogs and 2 billion links in 2008.

Usenet and blogosphere are distributed and federated structures based on servers but not on any central components. Peer-to-Peer (P2P) networks are entirely server-less architectures. They became famous because of Napster, launched in 1999, a public sphere of sorts for sharing media. Napster and its successors created great disruption in the music market and sparked an ongoing debate about copyright enforcement on the Internet. P2P protocols developed further into Bittorrent and wireless mesh networks and a generalised storage layer on the Internet, e.g., the InterPlanetary File System (IPFS) launched in 2015.

The prerequisite for the transmission of media content like music and video over the Internet is twofold. First, the copper wires of POTS (plain old telephone system) and the coax cables of the cable TV services need to be digitalised (e.g., as Digital Subscriber Line, DSL). Second, compression technology like MP3 for music and MPEG for video made file sizes small enough for transmission over bandwidths that in the 1990s were still narrow (e.g., 2,400 bit/s). These developments took place in the 1990s, so that from the early 2000s, both telcos and TV cable providers offered “triple play” with telephony, TV and Internet.

Broadband Internet, defined as a TCP/IP connection at a downstream speed equal to or greater than 256 kbit/s, has only started to spread from 2000 and is now pervasive across the region. It was available at 90% of households in Belgium and up to 97% in the Netherlands in 2020 according to data from EAO (table 20). ITU data shows that these are fixed, i.e. wired Internet connections shared by from 3.5 persons in Austria to 2.3 persons in the Netherlands (table 21).

Even more astonishing is the proliferation of mobile broadband connections. The first digital mobile telephony network in Germany launched in 1992. In that time, the first tranches of the “digital dividend” of spectrum no longer needed for broadcasting were auctioned to mobile carriers. In 2000, the ITU selected UMTS as standard for the third generation, allowing for transmission rates of up to 384 kbit/s. Internet-connectable smartphones appeared in the late 1990s but only saw their breakthrough in the mass-market with Apple’s first iPhone in 2007. Take-up of mobile connectivity started from essentially zero in 2007 and exploded in only ten years to the point where, with the exceptions of Belgium and Germany, each citizen in the region now has more than one connected mobile device (table 22).

As for the next generation of wired transmission technology, the incumbents lag behind the new entrants to the EU market. Glass fibre is the state of the art to be deployed wherever new cable is laid. The former state monopoly telcos in the region try to make the most of their legacy copper networks and shy away from investments. In contrast, Eastern European

countries had poor telephone networks. When telcos started to roll out connectivity after 1990, they laid glass fibre from the start. This inertia of the telcos in the North-Western European countries leads to most of them being at the end of the line in fibre among 39 OECD countries. In 2020 as to the percentage of fibre connections in total fixed broadband, Belgium, Austria, the UK and Germany took the last places with rates of 1.6 to 5.4 per cent. This was only topped by Greece in last place. Ireland (16.4%) and the Netherlands (21.3%) were closer to the OECD average (30.6%). Luxembourg (50.2%) was the only country in the region ahead of it. In the above-average fibre group there were the Slovak Republic, Slovenia, Estonia, Latvia (at 70.9% on place 5 of the global fibre charts) and Lithuania (76.6% at place 3 behind Japan and Korea). And there was also Portugal (55.1%) and Spain (73.2%). Maybe this is to prove the Bible verse that the first shall be the last (Chart 6).

Table 23: Percentage of households with broadband Internet (%)

GEO / TIME	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
EU 27 (from 2020)	70	74	79	81	82	85	87	88	90	92
EU 28 (2013-2020)	72	76	80	82	83	86	88	89	91	NA
AT	74	80	82	81	85	88	89	89	91	91
BE	73	73	77	79	76	82	83	83	86	90
DE	79	NA	86	87	88	90	93	92	95	95
IE	73	NA	76	85	88	89	92	94	92	92
LU	66	NA	72	92	93	95	95	95	97	93
NL	84	85	88	95	95	96	98	97	98	97
UK	80	85	87	87	89	91	94	95	95	NA

Source: EAO

Table 24: Fixed broadband subscriptions per 100 inhabitants

GEO / TIME	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
AT	2,36	3,96	5,54	7,35	10,59	14,22	17,28	19,51	20,73	22,44	24,38	24,81	25,05	26,09	27,38	28,29	28,85	28,47	28,35	28,13
BE	1,40	4,46	7,87	11,93	15,46	19,06	23,09	25,52	27,67	29,04	30,84	32,18	33,31	34,33	35,75	36,51	37,61	38,35	39,22	39,78
DE	0,33	2,58	3,93	5,48	8,57	13,22	18,38	24,30	28,01	30,86	32,37	33,71	34,53	35,28	36,31	37,55	38,76	40,22	41,11	41,99
IE			0,27	1,05	3,75	7,79	13,28	17,54	20,18	21,72	22,40	23,32	24,13	25,77	27,21	28,15	28,97	29,43	29,68	29,95
LU		0,28	1,31	3,43	8,08	15,31	21,25	27,10	29,50	31,44	33,15	32,69	31,97	32,53	33,69	34,46	35,06	36,26	37,12	37,37
NL	1,63	2,91	7,27	12,27	19,68	25,05	31,58	33,36	35,04	36,86	37,94	38,82	39,63	40,32	40,56	41,50	42,53	42,83	43,42	43,63
UK	0,09	0,56	2,29	5,23	10,23	16,42	21,40	25,39	27,85	28,45	30,18	32,16	33,61	35,45	36,27	37,45	38,42	39,03	39,60	39,67

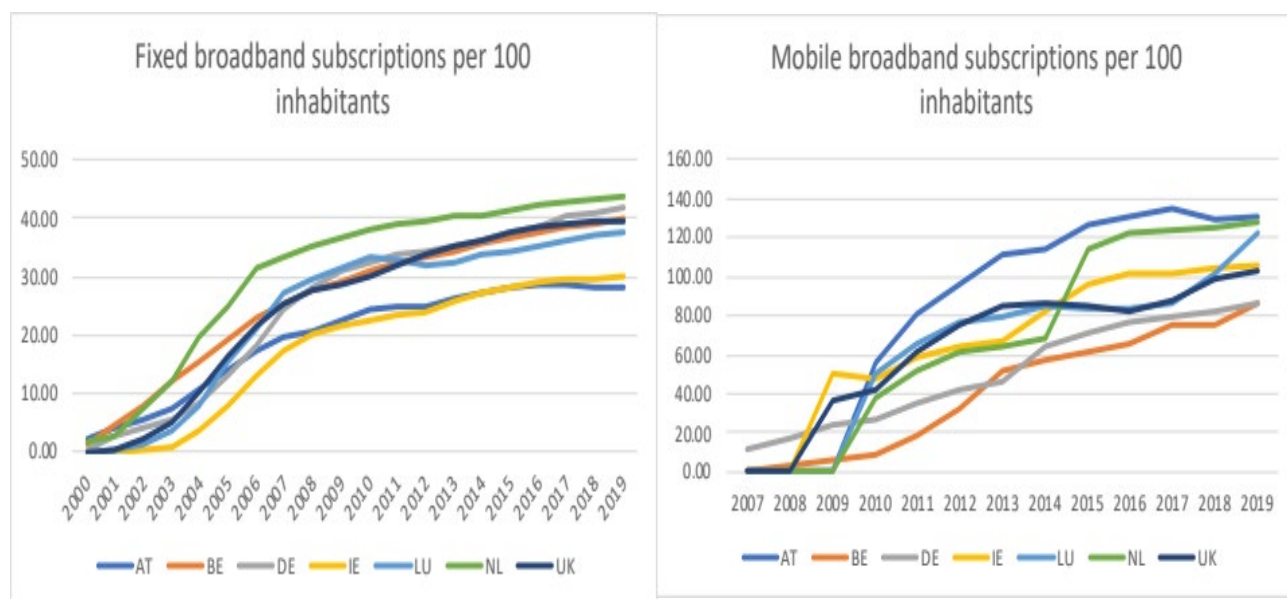
Source: ITU

Table 25: Mobile broadband subscriptions per 100 inhabitants

GEO / TIME	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
AT				56,09	80,35	96,29	110,92	114,54	126,44	130,01	134,15	129,60	129,92
BE		3,42	5,66	9,51	18,90	32,82	51,28	57,39	61,48	65,88	75,21	75,78	86,98
DE	11,32	16,78	23,49	26,23	35,37	41,62	45,58	64,58	71,49	76,76	79,25	82,56	86,52
IE			50,27	48,25	58,54	63,84	67,33	81,87	96,57	101,47	102,15	103,80	105,30
LU				49,95	66,24	75,95	78,74	84,76	84,17	83,21	86,84	101,56	121,76
NL				37,85	52,37	61,03	64,03	68,88	114,02	122,15	122,95	125,03	128,38
UK			36,29	42,22	61,10	74,94	84,71	86,17	84,83	82,63	87,26	98,54	103,39

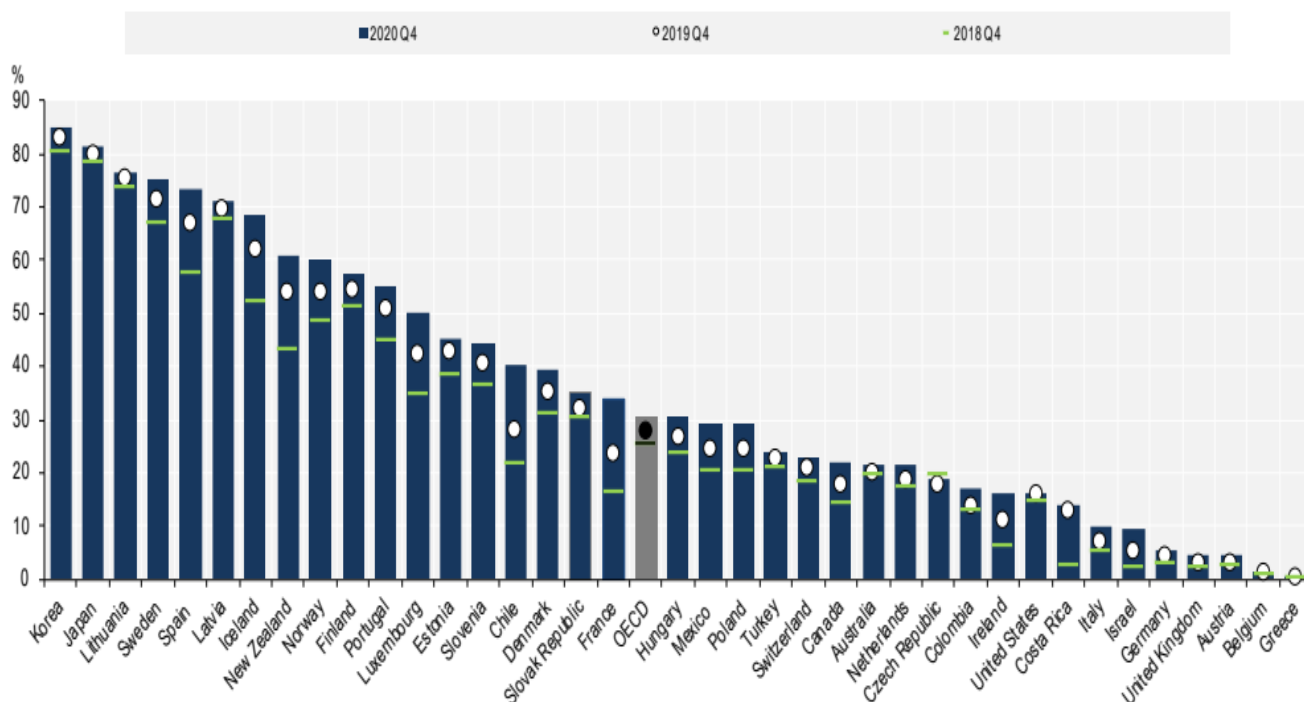
Source: ITU

Chart 5: Rise of Internet connectivity



Source: ITU

Chart 6: Percentage of fibre connections in total fixed broadband, December 2020



Source: OECD Broadband statistics

5.1. Platformisation of the Internet

What do people do on the Internet? We have seen that the network that was intended to interconnect computing resources quickly became inhabited by people who use it to socialise. Early social networks were decentralised, either federated like Usenet and blogosphere, or P2P like Napster.

This began to change in the early 2000s when centralised server-client platforms came to dominate much of the Internet's activity, eclipsing classic blogs in the late 2000s. Social dialogue became centralised on global intermediaries like Facebook (2004), Youtube (2005, acquired by Google in 2006), Twitter (2006), Tumblr (2007), Posterous (2008, which closed in 2012 after most of the team was taken over by Twitter), Whatsapp (2009, acquired by Facebook in 2014) and Instagram (2010, acquired by Facebook in 2012).

Social platforms do not provide content themselves but create feedback loops among their users. Search is a case in point. In the mid-1990s, services like Yahoo were scraping and indexing all webpages. The big question then was how to present the information if there were, say,

10,000 search results. Two Stanford PhD students had an ingenious idea. They realised that people are constantly making decisions about pages they find so important that they set links to them on their own webpages. In a research project in 1996, they started to develop the PageRank algorithm that grades a website by the number of pages and the importance of those pages that link to it. By harvesting millions of individual link decisions, they were able to approximate the 'relevance' of sites for any given search term.

What became Google (1998) is therefore not based on artificial intelligence but on data analysis of the sum of dispersed human decisions. It is as much a technical device as a social one, not unlike the citation index in science metrics. This approach proved so successful that Google search became a central gateway for navigating the Web for most of its global users, an infrastructural service much like a public utility.

Google added special searches like Google News (2002) that presents snippets from news sites. With Google Books (2004) it started to scan entire libraries providing full text searching on much of the world's printed knowledge. Google Arts & Culture (2009) does the same with artworks in museums across the world. It also scans the physical world with satellites and Street View cars for Google Maps (2005). There was controversy over each one of them.

Press publishers have complained that the company is freeriding on their investments when it shows snippets on Google News. With the Axel Springer enterprise as driving force, they campaigned for a new ancillary press publishers' right in addition to existing copyright. After failed attempts in Germany and Spain, this new right was passed into European law in the 2019 Copyright in the Digital Single Market Directive.

During the law-making process, as a public relations effort, platforms set up grant programmes to support and appease journalistic media: Microsoft News, the Facebook Journalism Project and, largest of them all, Google's News Initiative. A study by Dachwitz and Fanta recounts how Google has distributed more than half a billion euros to major European news companies since 2013. Their conclusion: "Google is the world's biggest patron of journalism" (Dachwitz/Fanta 2020, 11). Since this battle over the new publishers' right was lost, Google's funding now serves to tie media organisations more closely to the company's product ecosystem of analytics and advertising. Google is out to become the dominant "operating system" for digital journalism (ibid.: 91).

After Google founders Larry Page and Sergey Brin had solved search, the question was how to finance it as sustainable infrastructure, the use of which, as with all social platforms, is free to

the user. The answer was advertising. Around its search engine, Google built an analytics and advertising environment, launching AdWords in 2000. An entire ecosystem of platforms and ad tech companies emerged that is quite different from the world of offline media advertising. It starts with creating data profiles of individual users that are then sold or even auctioned to advertisers in real time. The more information is collected on the user's preferences, choices and behaviour, the more accurate the inferences on how well they fit the advertiser's intended target group (Ryan 2018). The prerequisite for this model is therefore the systematic and comprehensive surveillance, third-party tracking and profiling of users. Advertising will be addressed more deeply in the following chapter.

As intermediaries, platforms bring together large numbers of suppliers and consumers of information, products and services. Early exemplars led to platformisation expanding to taxi services (Uber, Lyft), apartment rental (Airbnb), sales of handmade products (Etsy), restaurant reviews (Yelp), food delivery (Wolt), gig work in general (Amazon's Mechanical Turk, Airtasker.com) and specific sectorial on-call work such as in photography (Snapp'r, Scoopshot, Eyeem, Flytographer).

In business lingo this wave of platformisation was termed the "sharing economy". In critical discourse it is discussed as "platform capitalism" (Nick Srnicek 2016) or "surveillance capitalism" (Zuboff 2019). The platform utilises the collective intelligence that manifests itself on the Internet and the willingness of people to share and cooperate (Grassmuck 2012), and channels them into an app that allows two or more sides to find each other. It internalises some of the transaction risks, provides a payment system and takes a commission; sharing economy, in this sense, means the intermediary platform takes a "share" of all transactions.

The more people are using a platform, the more valuable that platform becomes for everyone, for users, content providers and advertisers. This network effect creates a winner-takes-all situation, i.e. monopolies for given kinds of services (Youtube for video sharing, Twitter for short messages and Telegram for all who have been deplatformed on other platforms) and locks-in users who find it useful but also increasingly difficult to leave the more of their online interactions are stored in these walled gardens or data silos.

It might seem as if the technical structure of centralised client-server platforms is the main problem of the Internet. This is not the case. Wikipedia is also a platform, with the vision of "a world in which every single human being can freely share in the sum of all knowledge". It is open for everyone to read and to write, and is overseen by strict community guidelines. In some ways

it operates like commercial social platforms, only that here the guidelines are not decreed by a company but actually agreed by the community of volunteers.

The logic behind Wikipedia is, of course, fundamentally different from that of for-profit platforms. Yochai Benkler calls it “commons-based peer production” to distinguish it from the productive work of employees in firms, following the directions of managers, and of market actors, following price signals. In this third mode, groups of individuals work together as equals on large-scale projects – his archetypical examples are Free Software and Wikipedia – free-licensing their results, following a range of motivations and social signals. “This mode has systematic advantages over markets and managerial hierarchies when the object of production is information or culture, and where the physical capital necessary for that production – computers and communications capabilities – is widely distributed instead of concentrated” (Benkler 2002: 2).

The advantage becomes apparent when comparing the troublesome moderation system of commercial platforms with Wikipedia’s community-based quality control and fact checking that has proven astonishingly resilient against disinformation, spam, defacement, etc. Commons here does not refer to an imaginary, permissionless free access regime, which supposedly leads to its tragedy, but to the actually existing commons that economist Elinor Ostrom has researched. From her empirical work on communities of commoners, who sustainably organise their common resource, she has derived Eight Principles for Managing a Commons (Ostrom 1990) that are useful for organising community-based platforms.

In fact, it inspired a movement of “platform cooperativism” that builds alternatives to platform capitalism. The concept was coined as a critique of the “sharing economy” by New School professor Trebor Scholz in 2014. It also builds on people’s willingness to share and cooperate, and on the ability of platforms to match supply and demand, yet combines these aspects with the long tradition of worker-owned cooperatives. Therefore, the difference is not so much the technology used or the services offered (e.g., taxi rides and apartment rentals) but the ownership and democratic governance of the collective enterprise. The model of platform co-ops resonates across the globe and is being applied in sectors as diverse as childcare, data entry, urban recycling and home services. The model is developed further under the stewardship of the Platform Cooperativism Consortium and researched by the Institute for the Cooperative Digital Economy.

Science, of course, is also a common endeavour to advance knowledge by standing on the shoulders of those before us. It has not only built the Internet but on it, based on the four ethical principles formulated by Robert Merton (1942), it has built its own commons infrastructure, including: open-access pre-print servers like arxiv.org at Cornell University; dictionaries like LEO established in 1995 at the Technical University Munich; Open Educational Resources (OER); and the Internet Archive, a non-profit guided by digital librarian Brewster Kahle, which, for its WayBackMachine, scrapes and archives the entire Web like Google. But the times when scientist had the Internet to themselves are long gone.

So what do people do on the Internet? The use of the Internet obviously has been growing since 2000. Given the pervasive availability of fixed and even more so of mobile Internet, it is surprising that usage would not be 100% (table 26). A possible explanation is that the data in table 26 are based on national household surveys, and some people might feel that when using messengers like Whatsapp or Telegram they are not accessing the Internet but rather a telephony service like SMS.

While personal and group communication like email and messengers are among the most popular things people do online (e-mail was named as online activity by the highest average of 83.39% in 35 OECD countries in 2016), reading newspapers, magazines and other news sites as well as watching TV and on-demand video has also continuously gained in popularity across the region, even more so than using social media (tables 27, 28, 29 and 30).

The 1990s superhighway vision promised to bring “500 TV channels” to the homes (Dennis, Everette and Pease 1994). And in a sense this came true. While video did not kill the radio star (The Buggles, 1979), but online video seems set to replace ever more time spent on broadcast TV.

Two services can be singled out: One is the social video-sharing platform Youtube, launched in 2005 and acquired by Google in 2006. The other is Netflix, founded in 1997, initially to provide DVD rental by mail. In 2007, Netflix started its video on demand (SVoD) service. 2012 it expanded to Europe, first the UK, Ireland and Scandinavia. The Netherlands followed in 2013, Germany, Austria, Belgium and Luxembourg in 2014. Amazon launched its OTT SVoD service Prime Video in 2006. Apple started movie rentals in the iTunes Store in 2008. Youtube Premium followed in 2014.

The video streaming market in 2020, according to Statista data, in Germany was divided between Amazon Prime and Netflix (with 40% each, and Maxdome, Sky Ticket and Youtube Premium 5% each) (Statista 08/2021: 61). In the UK, Netflix (35%) is ahead of Amazon Prime (25%),

followed by NowTV (10%) and Youtube Premium, Sky Ticket, Hulu, HBO and DisneyLife 5% each (ibid.: 62). Based on company information, Statista reports that 2021, Netflix had 158 million paying subscribers in over 190 countries.

Like Amazon and Youtube, Netflix has been producing its own films and TV series under the label “Netflix Original”, starting with “House of Cards” in 2013. One year later, Amazon followed with its exclusive TV series “Bosch”. In October 2018, the company announced more local TV series for European markets, especially for Germany. In 2019, Netflix released 371 Originals (ibid.: 65). Netflix originals earned 20 of the Golden Globe Awards in February 2021 ([Wikipedia](#)) and seven Oscars in April 2021 ([Variety 25.04.2021](#)).

How successful is a society in mastering the different dimensions of digitalisation? The European Commission, as part of its Digital Decade programme, has devised the Digital Economy and Society Index (DESI) to provide data-based answers. DESI consists of weighted scores (0-100) of five dimensions: connectivity, human capital, use of Internet, integration of digital technology and digital public services (which, alas, do not include PSM). In the overall composite index for 2020, the Nordics are clearly leading the pack, followed by the North-Western Region (chart 7).

Table 26: Percentage of individuals accessing the Internet

GEO / TIME	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
AT	33,73	39,19	36,56	42,70	54,28	58,00	63,60	69,37	72,87	73,45	75,17	78,74	80,03	80,62	81,00	83,94	84,32	87,94	87,48	87,75
BE	29,43	31,29	46,33	49,97	53,86	55,82	59,72	64,44	66,00	70,00	75,00	81,61	80,72	82,17	85,00	85,05	86,52	87,68	88,66	90,28
DE	30,22	31,65	48,82	55,90	64,73	68,71	72,16	75,16	78,00	79,00	82,00	81,27	82,35	84,17	86,19	87,59	84,17	84,39	87,04	88,13
IE	17,85	23,14	25,85	34,31	36,99	41,61	54,82	61,16	65,34	67,38	69,85	74,89	76,92	78,25	83,49	83,49		84,11	84,52	
LU	22,89	36,16	39,84	54,55	65,88	70,00	72,51	78,92	82,23	87,31	90,62	90,03	91,95	93,78	94,67	96,38	98,14	97,36	97,06	
NL	43,98	49,37	61,29	64,35	68,52	81,00	83,70	85,82	87,42	89,63	90,72	91,42	92,86	93,96	91,67	91,72	90,41	93,20	92,57	93,29
UK	26,82	33,48	56,48	64,82	65,61	70,00	68,82	75,09	78,39	83,56	85,00	85,38	87,48	89,84	91,61	92,00	94,78	90,42	90,69	92,52

Source: ITU

Table 27: Percentage of individuals using the Internet for reading online news sites, newspapers and magazines

GEO / TIME	2013	2014	2015	2016	2017	2018	2019
EU 27 (from 2020)	47	51	53	56	60	NA	62
EU 28 (2013-2020)	48	52	54	57	61	NA	63
AT	41	54	57	56	63	NA	58
BE	NA	53	52	56	56	NA	59
DE	57	61	63	64	67	NA	71
IE	33	37	38	41	53	NA	67
LU	77	81	82	87	85	NA	72
NL	56	57	55	70	76	NA	75
UK	58	59	65	64	68	NA	70

Source: Eurostat

Table 28: Percentage of individuals using the Internet for watching streamed TV or videos

GEO / TIME	2016	2017	2018	2019
EU 27 (from 2020)	54		59	
EU 28 (2013-2020)	56		61	
AT	60		66	
BE	48		53	
DE	62		68	
IE	52		61	
LU	83		51	
NL	78		85	
UK	65		80	

Source: Eurostat

Table 29: Percentage of Daily /Weekly Social media users

GEO / TIME	2000		2005		2010		2015		2020	
	D	w	D	W	D	W	D	W	D	W
AT	NA	NA	NA	NA	14	20	28	24	47	25
BE	NA	NA	NA	NA	21	16	36	20	59	19
DE	NA	NA	NA	NA	12	17	26	14	46	16
IE	NA	NA	NA	NA	24	22	47	14	65	17
LU	NA	NA	NA	NA	19	17	43	13	63	17
NL	NA	NA	NA	NA	30	22	53	16	64	16
UK	NA	NA	NA	NA	25	15	44	15	NA	NA

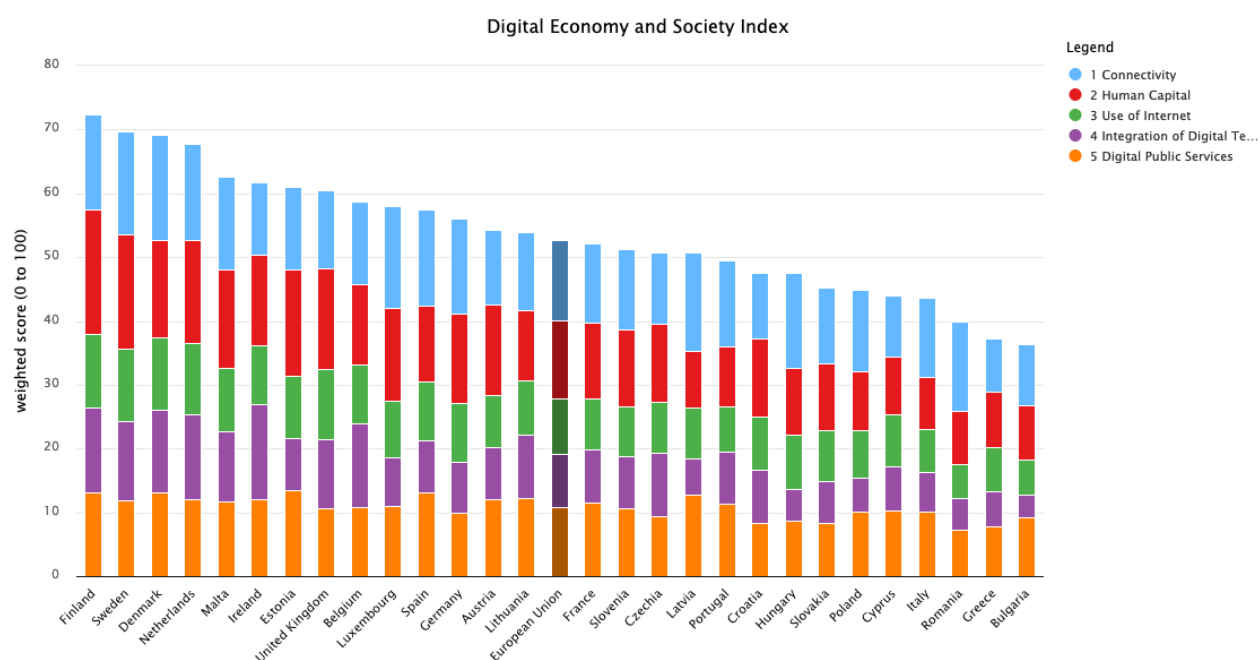
Sources: Standard Eurobarometer eb54, eb74, eb84 and eb94)

Table 30: Percentage of individuals aged 16-74 participating in social media in the last 3 months prior to the survey

GEO / TIME	2011	2012	2013	2014	2015	2016	2017	2018	2019
EU 27 (from 2020)	36	NA	41	44	48	49	52	54	54
EU 28 (2013-2020)	38	NA	43	46	50	52	54	56	57
AT	35	NA	37	44	45	49	51	53	56
BE	40	NA	47	52	67	69	72	73	76
DE	42	NA	42	42	57	50	51	53	53
IE	40	NA	48	50	53	58	59	60	64
LU	46	NA	57	60	68	67	68	64	63
NL	46	NA	55	59	59	62	67	66	67
UK	NA	NA	NA	NA	NA	NA	NA	NA	NA

Source: Eurostat, EAO

Chart 7



Source: EC, Digital Economy and Society Index (DESI): [DESI composite index](#)

6. The advertising market

Media are financed by broadcast fee or taxes, by subscriptions or pay-per-use or by advertising. For all but non-market media, the ad market is therefore a crucial factor. Since TV and radio remains popular throughout the region, also advertising expenditure in both media remains stable over the last thirty years, with a slight peak around 2000 or 2005 (tables 31 and 9 and chart 8). We had noted a dramatic decline of ad money going to newspapers and magazines after 2010

(table 5). The explanation of where that money went is found by looking at the Internet. In 2019 with the exception of Austria and Luxembourg, around half and in the case of the UK more than 65% of ad money is spend there (table 31a). The first digital ad was served in 1994. It subsequently has thoroughly undermined the business model of print advertising. The lines of print and Internet ads crossed in 2011 (chart 8). The pandemic in 2020 caused global ad revenues to drop by 19 percentage points. Print ads accounted for 9 per cent and newspapers (print and digital) for only 5.7 per cent globally. Most of the money goes to the platforms of Google, Facebook and Amazon that in 2020 together received 64.4 per cent of global digital ad spending and took nearly 90 per cent of all growth (WAN-IFRA 2021: 71 ff.).

The explanation is twofold. People spend ever more time on the Internet and advertisers follow. But more specifically, Internet platforms can and do collect much more information on their users than magazines or TV stations could ever learn about their audiences from surveying them. If the target audience is women, an ad placed in a newspaper or on TV will have a scattering loss of fifty per cent. Platforms allow advertisers to select their ad to be shown to women in a certain territory in urban settings with a certain age and income, meaning that every single euro spent reaches a member of the target group.

Furthermore, in the programmable environment of the Internet ad placements do not take place manually but are automated (“programmatic advertising”). An advertiser sets the criteria and thresholds for the desired target audience. The moment a user accesses a webpage, her profile is sent into an auction where any number of advertisers place their automated bids. The winner gets to place its ad on the page displayed to the user. All this happens in real time so that the ad often appears even before the content of the webpage. In short, this kind of online advertising is more efficient by allowing for much more fine-grained targeting, it is cheaper and gives instant feedback on the conversion rate, i.e. the number of targets who click through to the ad link. Irish privacy activist Johnny Ryan (2018) at the 2018 conference of EGTA, the Association of television and radio sales houses, explained this Real Time Bidding (RTB), the large number of actors involved and personal data shared among them without explicit user consent and therefore in violation of the GDPR. His message to the broadcasters: Adtech is stealing your audience.

Adtech was pioneered by Google that launched its AdWords in 2000. Just as with harvesting human link decisions for its PageRank search algorithm, the company extracts and analyses all possible data points about their users. This includes not only conscious expressions

such as likes, follows and comments but also behavioural data that most users are not even aware of, and by means of third party tracking this profiling extends beyond the operators own platforms. These “big data” are claimed as raw material for generating the advertising services and products that are the main source of revenue for Google, Facebook & Co. This ad-driven mass surveillance has been analysed as the defining mechanism of the current phase of surveillance capitalism (Zuboff 2019). It allows to make predictions on consumers’ future choices and provides convenience through personalisation. Recommendation systems designed to keep users glued to a given platform have been accused of presenting e.g. Youtube users with ever more radical videos, causing a polarisation of society (Tufekci 2018). Personally targeted advertisements are particularly dangerous in election campaigns. This became apparent in the Facebook-Cambridge Analytica data scandal in 2018 (Wylie 2019). In short, surveillance-based advertising is widely seen as the primary culprit threatening privacy, democracy and freedom on the Internet.

Politics has started to respond by regulating the sector to curb surveillance. The EU’s e-Privacy Directive of 2002, amended in 2009, first required express consent for storing and accessing information on users’ equipment. This was strengthened in the 2016 General Data Protection Regulation (GDPR). Advertising is also a hot topic in the upcoming Digital Services Act (DSA). With regulatory restrictions tightening browser makers have started to respond. Apple in its Safari and Mozilla in Firefox started to block third-party cookies by default in 2013 ([hubspot 16.05.2013](#)). Google announced this step in Chrome only in 2022, saying that it will take two years to work with advertisers to ensure that this pivot does not destroy the online advertising business.

The marketers have lamented the phase-out of tracking the “[death of the third-party cookie](#).” The ad scene is in turmoil. Opponents argue that cookies are needed for the personalised experience, which users would not want to do without. And publishers would lose out because without personalising cookies, advertising is likely to generate less revenue. Everyone, most of all market-maker Google is eager to seek alternatives to continue targeting their customers. These include first-party cookies, hashed-emails, mobile advertising IDs, fingerprints of the users’ device and operating environment, edge computing where personal information is processed on the user’s device without leaving it and context-based targeting (WAN-IFRA 2021: 71 ff.).

Yet it seems that the simplest solution is also quite effective. When Dutch PSM NPO and its advertising sales house STER in 2019 offered users on the NPO sites a real honest choice to opt in or out of third-party cookies, unsurprisingly, the majority opted out. This let STER to remove them entirely and switch to context-based targeting in January 2020, i.e., ads are placed against a content a user has chosen to watch rather than against her personal profile. The expectation was that ad revenues would drop. The opposite was the case. Ryan was given access to the numbers and reported that “NPO properties now provide no geotagging, no frequency capping, and no cross-device measurement. Despite the absence of these features, extensive testing with advertisers has proven that the ads are effective, and advertisers are spending more with NPO than before.” (Ryan 2020) Even under conditions of the pandemic that caused a slump in ad revenues overall, NPO yielded significant revenue growth over the same period the previous year (Chart 9).

Ryan calls on the adtech industry to stop designing ways to maintain tracking in the future. “This is a fool’s errand that contorts logic and law in the hope of maintaining a system whose disappearance is inevitable. It is also an errand entirely in the service of the adtech industry, to the disadvantage of publishers large and small.” (Ryan 2020) The real answer is simple and has been proven by NPO: stop tracking people.

Table 31: TV advertising expenditure (%)

GEO / TIME	1990	1995	2000	2005	2010	2015	2019
AT	26.94	23.34	23.62	23.46	22.72	26.63	27.32
BE	NA	35.13	39.61	34.98	36.45	31.6	27.06
DE	13.85	26.54	20.2	26.47	23.75	25.02	21.69
IE	28.51	32.81	34.09	21.92	25.85	24.15	17.95
LU	NA	5.26	10	NA	9.3	8.5	7.48
NL	16.85	23.87	34.13	21.95	22.1	24.06	20.35
UK	26.05	28.46	27.35	30.15	30.06	27.91	18.83

Sources:

1990-2000: European Communities (2003)

2005-2019: World Advertising Research Center (WARC), in: EAO Yearbook 2020

Table 31a: Internet advertising expenditure (%)

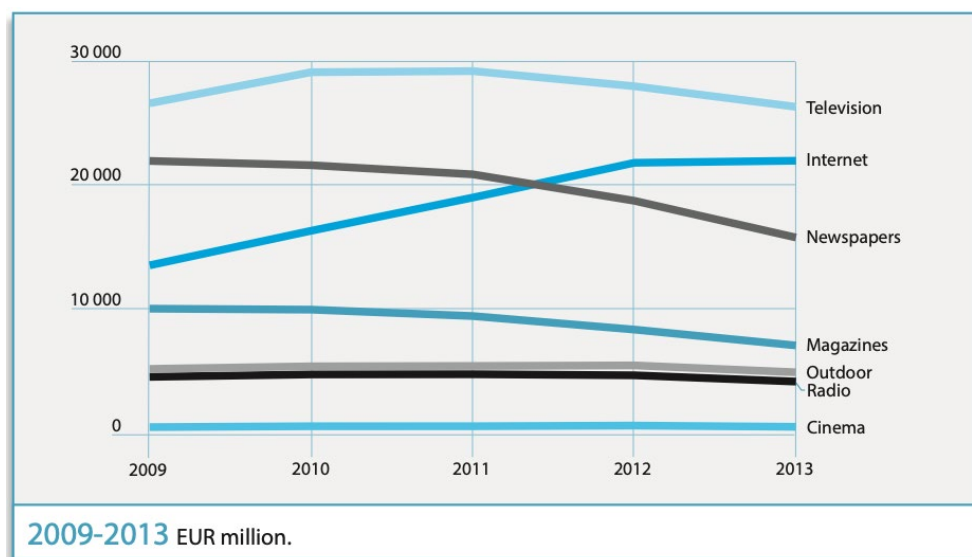
GEO / TIME	2000	2005	2010	2015	2019
AT	NA	1.37	9.32	13.74	16.01
BE	0.73	2.45	12.23	26.39	40.39
DE	0.66	2.03	19.48	28.75	42.24
IE	NA	0.79	10.55	33.12	46.77
LU	NA	NA	NA	7.19	9.06
NL	0.71	4.15	26.89	40.98	53.85
UK	0.91	9.71	28.68	47.26	65.22

Sources:

2000: European Communities (2003)

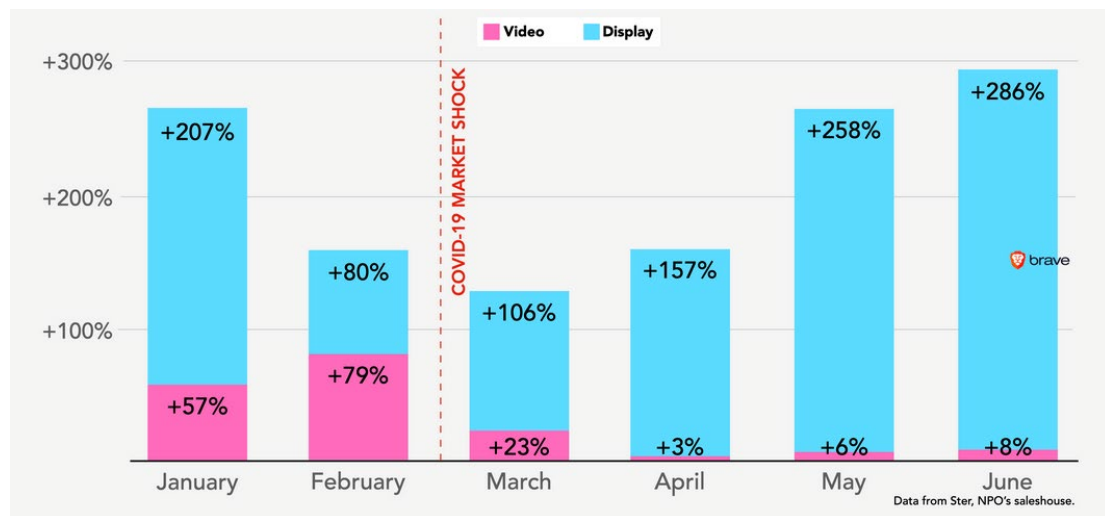
2005-2019: World Advertising Research Center (WARC), in: EAO Yearbook 2020

Chart 8: Advertising expenditures by media in the European Union



Source: EAO Yearbook 2014, p. 114

Chart 9: Increase in sales of NPO impressions, after removing all 3rd party ad tracking in 2020



Source: Ryan 2020

7. Trust in the Media

Critique and self-critique are a constitutive element of the system of journalistic professionalism. Media criticism, like music, literature or games criticism, is an established branch of journalism and a common format in media. This includes fundamental criticism, like the one that media are not there to inform the public about current affairs but to “manufacture consent”. Herman and Chomsky’s 1988 book is a pointed analysis of political parallelism in which the media serve, and propagandize on behalf of, the powerful societal interests that control and finance them. “Structural factors are those such as ownership and control, dependence on other major funding sources (notably, advertisers), and mutual interests and relationships between the media and those who make the news and have the power to define it and explain what it means.” (Herman and Chomsky, 2008: 1).

Theirs was a capitalism-critical analysis from the left. It resonated with and inspired globally, including collective action against the worst representatives of the yellow press, like Springer’s Bild, as well as creating alternative media, like the “Information service for the dissemination of omitted news” (Informations-Dienst zur Verbreitung unterbliebener Nachrichten, launched in 1973 in Frankfurt), community radio stations and pirate TV stations on hacked cable networks.

Bild was overtly spreading hate. Herman and Chomsky allowed to see the “official agenda” behind ‘the system’ and identify the puppet masters.

Today, fuelled by the pandemic we hear similar arguments from Covid-deniers. With a copy of the constitution in hand, they call on anyone to think for yourself, make up your own mind, don’t trust the “system press”. The largest alternative media of today are created by professional journalists who spent much of their life as members of the “mainstream media” they now condemn as the enemy.

In a representative survey in Germany for the Konrad Adenauer Foundation, Jochen Roose observed that hate murderers like Breivik in Norway and the ones in Christchurch and Halle belief that secret powers control the world. This is also the core element of the QAnon narrative. Asked whether they believe this, 11% of Roose’s respondents said that this is certainly the case, 19% that it is probably true. Therefore, nearly a third of the population tend to believe in a world conspiracy (Roose 2020).

While two thirds of the population in the uncertainty of the pandemic turned to PSM as their trusted source of information, one third seems to have gone down the rabbit hole into an otherworld (Demmel 2021).

“Trust” has become an important metric in public discourse, if a difficult one. What do people mean when they reply to the question if they trust the national army, the police, the government, the banks or “the media”? When asked: do you trust the press, TV or even “the Internet”? the only serious answer can be: it depends. But if asked consistently over time these trust surveys give an indication of trends. The EBU in its Trust in Media 2020 report (based on Standard Eurobarometer 92) finds that radio has a positive trust index of 21, while the written press stands at -1 and the Internet at -23 followed by national parliaments and governments, whereas political parties (-57) are trusted even less than social networks (-45) (EBU 2020: 13).

The composite trust in media index of 2019 shows that Luxembourg, Germany and the Netherlands were close to the EU28 trust average. Ireland was mid-field. Belgium and Austria were at the high end of high trust and low in distrust. The UK was at the end of the line not only in the region but in the entire EU with the lowest level of high trust (7%) and highest distrust (60%) (charts 10 and 11). Trust in the press was high throughout the region, with medium trust in Ireland and again no trust in the UK (EBU 2020: 38 f.). Trust in radio was high throughout, except in the UK where it was only medium high and had decreased by more than 10 points between 2014 and 2019 (ibid.: 32). Trust in PSM, particularly PSM news, was highest in the Nordics, the Benelux

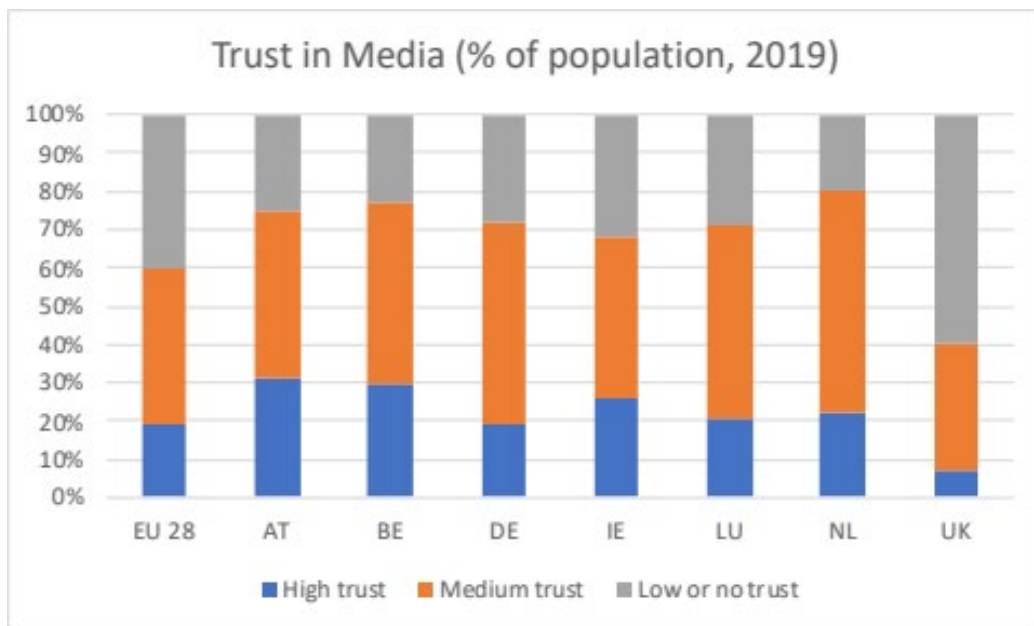
states, Central Europe, Ireland and the UK (ibid.: 17). With the exception of the BBC, the UK trusts neither its national news, nor its newspapers or TV.

Why is trust in media eroding? There is some evidence that this is not driven entirely by delusions of conspiracies but also by reports of actual threats against journalists, interference with their work and political pressure on PSM. The – inverted – World Press Freedom Index, that is high where there are no problems, strongly correlates with the level of trust in a country's broadcast media (combining trust in radio and TV) (chart 12). “The strong correlation suggests that in the European context, citizens' trust in radio and TV is intertwined with a free and independent news media landscape.” (EBU 2020: 14)

Reporting on the results of the Reuters Institute Digital News Report survey 2020, which showed that trust in the news has fallen in most countries since 2015, Richard Fletcher concludes that “within our community there's no real consensus on why this has happened or what can be done about it.” A closer look at the data provides a more differentiated picture: In 10 of the 18 countries trust in news has indeed declined, in Germany from 60% in 2015 to 47% in 2019, in the UK from 51% to 40%. But in the other eight countries it has either increased or stayed the same. “Furthermore, even in those countries where trust has fallen, the decline in some ways looks smaller than we might have inferred from the crisis narrative that permeates many discussions.” (Fletcher 2020)

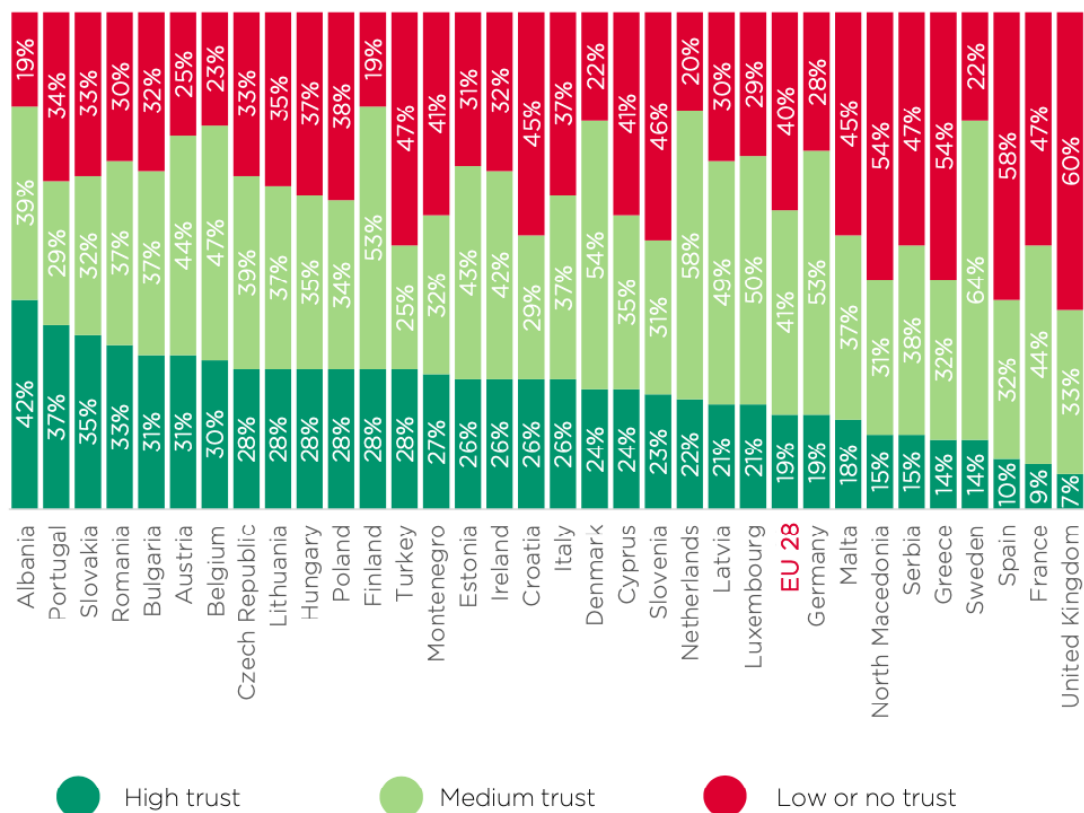
In search for explanations, Fletcher points to recent comparative research that finds that media trust cannot be analysed in isolation but is connected to political trust, to polarisation or even a more general disenchantment with social institutions (e.g. Hanitzsch, Van Dalen and Steindl 2017; Newman and Fletcher 2017). “If trust in political institutions falls, then trust in the news media is dragged down with it. And if the political situation becomes more polarised, even the best news coverage can come to be seen as biased by large sections of the population.” (Fletcher 2020). What can news media do to increase people's trust? The answer Fletcher suggests is: do their job properly. “Reporting in a timely manner, helping them understand the world around them, and holding power to account. In other words, people with low trust in the news media don't want it to be fundamentally different – they just want it to be better.” (Fletcher 2020)

Chart 10: Trust in media (% of population, 2019 in the North-Western European region)



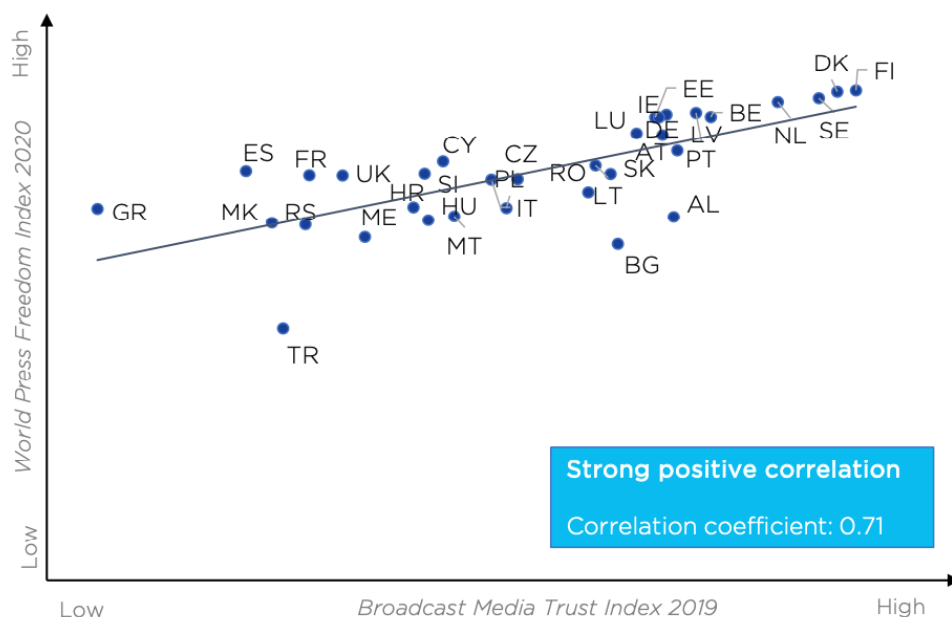
Source: EBU 2020

Chart 11: Trust in media (% of population, 2019)



Source: EBU 2020

Chart 12: Press freedom vs. trust in broadcast media



Source: EBU 2020

8. The North-Western European media model in comparison

The data in this report confirm the existence of a cluster of countries with similar characteristics that Hallin and Mancini (2004) termed the Democratic-Corporatist model of media systems. Particularly PSM and the role of the state in ensuring the freedom of the press and the diversity of media remain strong throughout the seven countries of the North-Western European region.

In the region report, we have argued that the UK and Ireland with their strong PSM and polarized press belong to the Democratic-Corporatist rather than the Liberal Model. This has been confirmed as well. The UK remains somewhat different, though, in that it was at the forefront of the neoliberal shift. It had the highest number of commercial radio and TV stations in the region, peaking in 2010, and in the same year also the highest daily TV viewing time (242 minutes). The UK also shows by far the highest number of online-only news sources and the most dramatic drop in ad revenues of newspapers while it has the highest share of ad spending on the Internet (65% in 2019). While citizens in the region trust their national media most of the time, the UK has the lowest trust in media in all of Europe. Brexit and the pile of lies it was based on suggests itself as explanation. It seems to have ruined confidence in media as effectively as

Donald Trump incessantly calling them “fake news”. The only exception still trusted in the UK is the BBC, and that is under attack with Prime Minister Boris Johnson filling all its controlling posts with anti-BBC personnel (see WP1.1).

Austria’s classification in the Democratic-Corporatist Model has been called into question, favouring to place it in the Polarized-Pluralist Model of the Mediterranean countries instead. In our Region Report, we have argued that characteristics like high journalistic professionalism, decreasing political parallelism and an inclusive, regulated press market convinced us to keep Austria in the Democratic-Corporatist group. The data review confirms this decision while also showing some peculiarities. Austria – with the exception of PSM-free Luxembourg – is the only country in the region where ad expenditure in press remains high to this day, likely because of strong indirect press subsidies through government ads. Together with Flemish Belgium it is the only country in the region where TV viewing time continued to increase over the thirty year period. Together with Ireland, it is the only country that saw a significant drop in PSB TV viewership share. And finally, together with Belgium, Austria shows the highest levels of trust in media.

A peculiarity of the Benelux countries Netherlands, Belgium and Luxembourg is that, for reasons of geography, they have built the most extensive cable infrastructure in the region which is the preferred mode of TV reception and also the basis for digitalisation, whereas in the larger countries satellite TV is strongest.

The Covid-19 pandemic and the lockdowns changed media habits everywhere. In the region, more people turned to TV news, preferably PSM, and to trusted news sources online. Professional, social and cultural life largely moved to the Internet with video conferencing, streaming, messaging and podcasts. This amplified the negative trends of print media. Reuters predicts: “The net effect will be to speed up the shift to digital.” (Reuters Digital News Report 2020: 13).

The crisis also amplified right-wing, populist movements that had grown since the 2010s. Their spokespeople now claim that the virus is harmless but used by an “elite” as a pretext to foment fear, abolish fundamental rights and establish a dictatorship. By now, up to a third of the population tends to believe in dark powers that control world affairs. They no longer trust the government, science and media and get their information from alternative media that spread “alternative facts”.

German journalist Hans Demmel conducted a self-experiment by getting his news exclusively from such alternative sources for half a year. He found it frightening how quickly even he as a seasoned journalist was drawn into a sphere of doubt and fear where only one thing is certain: that nothing is like it seems. Part of the persuasiveness of the Covid-deniers' print and online media is that many of them are professionally produced, including all the tricks of the trade. They claim to reach tens of thousands of readers in print and hundreds of thousands online. Even more astonishing in Demmel's account is how many journalists he encountered in this otherworld whom he calls "formerly rightly esteemed colleagues" (Demmel 2021: 7). These include well known business journalists for quality papers, former employees of PSM, including newscasters, award-winning documentary filmmakers and former leftist journalists.

While magazines like Compact, KenFM and Junge Freiheit are professionally produced by trained and experienced journalists, they contain very little fact and lots of know-it-all, arrogant, cynical opinion, observes Demmel. The main purpose is to spread doubt and fear about "the official version of reality". The alternative version is black-and-white, us-against-them, with clear enemy images and a self-depiction as resistance fighters, often likening oneself to those against the Nazis.

There is evidence from obscure sources, innuendos, agitation, lies and hatred. As motives for the radicalisation of his former colleagues, Demmel suggests a mix of business interests and hankering for recognition and applause. Looking at circulation, hits and merchandising of these media, one can estimate that the market niche of the otherworld is significant and lucrative.

This should remind us, that professionalism as criterion for gauging a media system cannot be reduced to technical craftsmanship of interview techniques and effective layouts. It must include a professional ethics, a moral compass as to a journalist's role in society and democracy, and a clear red line against business models based on agitation, lies and hatred.

Demmel in an interview calls it extremely dangerous, that through these media anti-democratic ideas mill their way into the middle classes. "I have intensively witnessed how the radicalisation on the distrust side is deliberately fuelled by these alternative media. We are talking about the undermining of a common idea of reality that is indispensable for a democratic society." ([DWDL.de 21.9.21](https://www.dw.com/de/21.9.21)).

This danger is manifest. Words are followed by actions. Journalist reporting from demonstrations against Covid measures are regularly attacked and can only work under protection of body guards (one of the reasons why Germany lost two points in the [2021 World](#)

[Press Freedom Index](#) of Reporters without Borders). In Germany, nearly 200 attacks against vaccination centres have been committed ([Radio Bremen 25.09.2021](#)). On 18 September 2021, a man shot dead the cashier of a gas station in Idar-Oberstein allegedly because he had refused to serve him without wearing a mask. The alleged murderer had followed many of the alternative media on Twitter ([Übermedien 23.09.2021](#)).

Social media platforms like Youtube, Facebook, Twitter and Telegram are crucial for publishing and sharing of alternative media. But they have also come to dominate online information, news consumption, debate and advertising in general. In fact, platforms have become a focus of EU concern in various ways since the beginning of the century. These have led to regulations against hate crimes, terror propaganda, disinformation and child abuse material. The 2019 Copyright in the Digital Single Market Directive strengthened copyright enforcement on user-upload platforms by mandating upload filters and introduced a new ancillary press publishers' right in Europe. The 2018 Audiovisual Media Services Directive (AVMSD) expressly covers video sharing platforms with rules for the protection of minors and against criminal offences, terror and hate. It also mandates a quota of thirty per cent of European works on all audiovisual platforms in Europe and established the European Regulators Group for Audiovisual Media Services (ERGA). While the AVMSD already contains provisions on advertising, this and other horizontal platform regulations will be at the centre of the upcoming Digital Services Act (DSA) and the Digital Markets Act (DMA).

Ownership concentration and market dominance of platforms have been addressed since 2010. EU antitrust authorities investigated Google over Google Shopping, Google AdSense and its Android operating system and imposed fines of more than €8 billion. An investigation of Google's proposed acquisition of the fitness tracker company Fitbit is ongoing. Also still pending are the decisions on Amazon's marketplace and Apple's App Store and payment system. In June 2021, EU authorities launched an investigation against Facebook over the use of data for its Marketplace and for Facebook Dating ([Politico 04.06.2021](#)). Issues of EU media regulation will be further explored in WP1.4.

In view of the dominance of US and increasingly Chinese platforms on the Internet, the pursuit of digital sovereignty has become a priority of the EU. In her State of the Union Address 2021, Commission President Ursula von der Leyen highlighted the European Green Deal and digitalisation. These include protective measures like the proposals to contain the gatekeeper power of major platforms and underpin their democratic responsibility in the DSA and the DMA.

And they include capacity building. Within the NextGenerationEU programme, she announced EU investments in 5G and fibre and in digital skills. The potential has been underlined by a recent study on the impact of Open Source Software and Hardware on technological independence, competitiveness and innovation in the EU economy. It showed that an investment by at least 260,000 European free software developers mostly in start-ups and other SME of €1 billion in 2018 created an economic impact across all Member States of between €65 and €95 billion (Blind et al. 2021: 15).

Von der Leyen stressed the importance of investing in “European tech sovereignty”. She announced a European Chips Act, intended to create a European chip ecosystem (Leyen 2021: 6). In closing, the President returned to European values, among which freedom features prominently. She announced a Media Freedom Act for 2022:

“Allow me to finish with one of the freedoms that gives voice to all other freedoms – media freedom. Journalists are being targeted simply for doing their job. Some have been threatened, some beaten and, tragically, some murdered. Right here, in our European Union. Let me mention some of their names: Daphné Caruana Galizia. Ján Kuciak. Peter de Vries. The details of their stories may be different but what they have in common is that they all fought and died for our right to be informed. Information is a public good. We must protect those who create transparency – the journalists.

That is why today we have put forward a recommendation to give journalists better protection. And we need to stop those who threaten media freedom. Media companies cannot be treated as just another business. Their independence is essential. Europe needs a law that safeguards this independence – and the Commission will deliver a Media Freedom Act in the next year. Defending media freedom means defending our democracy.” (Leyen 2021: 19)

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Market Report on Nordic media



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101004488

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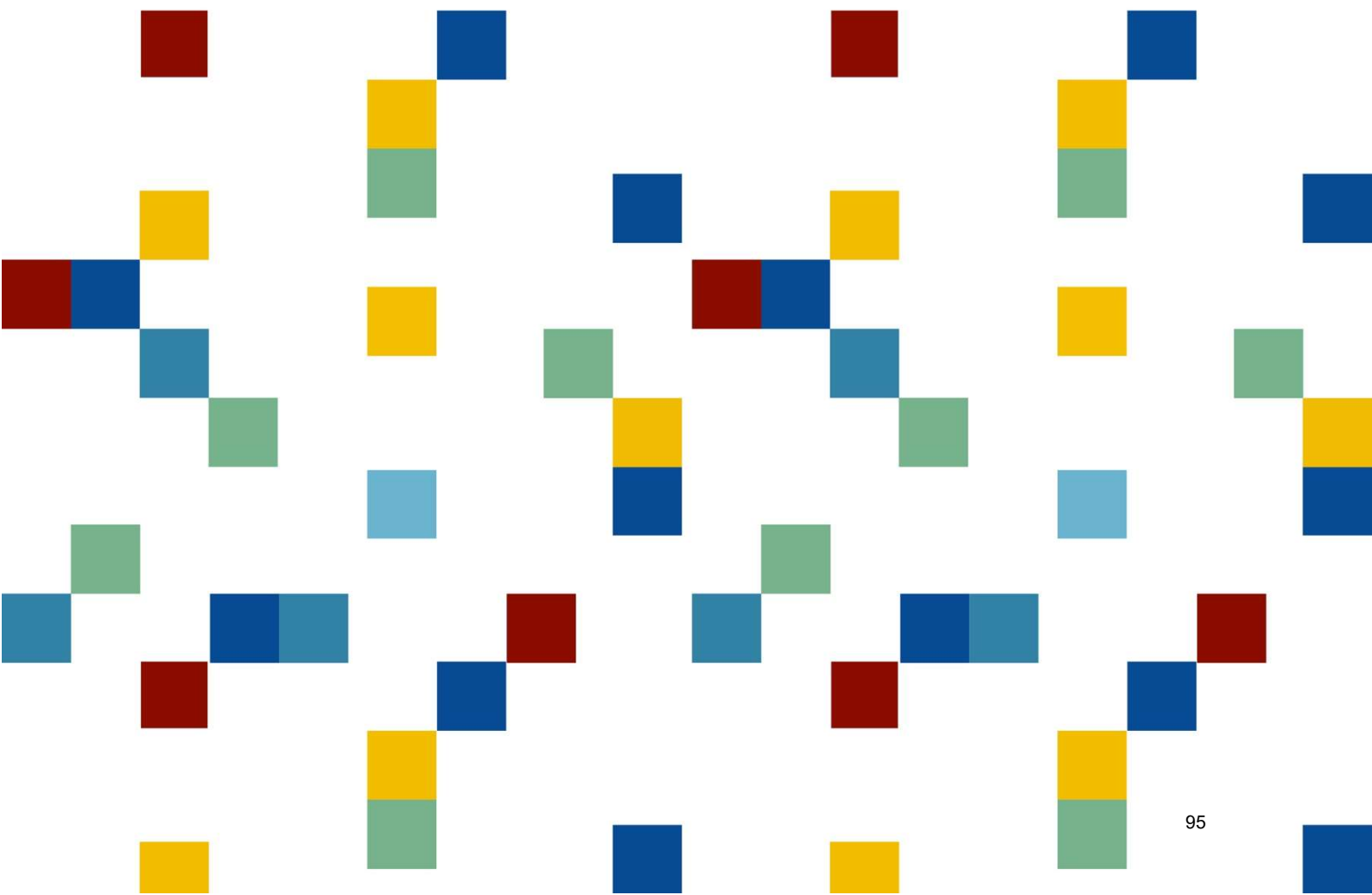


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1.Introduction

The present report addresses the context for consumption of media that characterises the Nordic countries, in contrast to other “peer” groupings of countries. In this in partly builds on, and adds, to a previous regional report (EUMEPLAT, 2021), whose focus has rather been on the production of media. In practice, the production and consumptions parts cannot be separated in any distinct sense, and thus the two reports display commonalities and also certain overlap.

In analysing patterns in media consumption, we apply the approach set out by Hallin and Mancini (2004), which distinguishes particularly between the Nordic, Western, Eastern, and Mediterranean media structures, while also taking account of variation at the national and European levels. It should be noted, however, that the differentiating factors stressed by Hallin and Mancini (2004) are more directly applicable at the production rather than consumption side. Again, however, the two are interrelated, and we thus apply that model also for the analysis of media consumption in this report. In the concluding chapter, where we raise the issue to what extent the Hallin and Mancini model remains relevant for understanding where the Nordic media system finds itself today, we pick up on the observations and conclusions made in both reports, with regard to the changes in both production and consumption, and how the two relate.

Where relevant data is available and palpable national differences at hand, where possible we discuss what applies specifically to the consumer behaviour patterns of media users across each of the Nordic countries, namely Denmark, Finland, Iceland, Norway, and Sweden. The most common media channels, which are the focus of our analysis are: TV, Radio, Newspapers, and Online Broadcasting. The aim is to depict the trends of the last 30-20 years and identify clear patterns of consumer behaviour. Furthermore, we reflect on the origins and special nature of the political media model of the Nordic countries. Part of our concern has to do with the way that the Nordic model has evolved over time, and then particularly when judged in international comparison. The objective is to determine to what extent references to a coherent corporatist Nordic model continue to make sense and, if so, in which respects, and

with what results. Here, again, we draw upon lessons and observations from our first report “The Democratic Corporatist Model”.

In the third and fourth chapter, we highlight the influence of digitalisation and consequential change in consumer behaviour when it comes to acquisition of news as well as trust in news. In this regard, the emergence of large amounts of online content generated by everyone has led to false proclamations and spread of fake news. We analyse how social media channels are changing the consumption patterns of media users by offering each and every one a platform to express their opinion and state their facts. The new form of fact-checking now involves the number of followers and likes of a respective content creator and post. This affects professional journalism to a large extent and makes it the more important to generate mechanisms for fact-based journalistic content to be disseminated to a broad public.

In our concluding chapter, we briefly review and synthesise some key observations of the media landscape in the Nordic countries, drawing not just on consumer behaviour but also the production side. Comparisons are elaborated by way of similarities as well as dissimilarities with other regions in Europe, with reference to the Nordic Corporatist Model set out by Hallin and Mancini (2004). The report ends with our tentative conclusions on the extent to which we can still speak of a distinct Nordic media model, of relevance to today’s world and the days to come.

2. Consumption Patterns in the Nordics

After analysing the patterns in media production in our first report, we are now focussing on the consumption patterns of users within the Nordics. Thereby, we are analysing newspaper circulation in greater detail and pointing out trends from the consumer perspective.

2.1 Newspaper Circulation

Newspaper circulation remains high compared to other parts of the world. As a growing share of the public moves online, however, the newspaper media have become more concentrated. Notably, the leading tabloid newspapers, *Aftonbladet* and *Expressen*,

perform well in online advertising and are able to keep expanding its audience. Similarly, the leading quality-oriented morning newspapers, *Dagens Nyheter* and *Svenska Dagbladet*, dominate online newspaper subscriptions. Local press, by contrast, is weakening. Danish leading newspapers are the *Berlingske*, *Politiken*, *Weekendavisen*, and *Ekstrabladet*. Some of the Norwegian top selling newspapers are *Aftenposten*, *Adresseavisen*, *Agderposten*, *Bondebladet*, *Dagbladet*, and *Firda*. Some observers view these developments as linked to the appearance of new social gaps, partly between urban and rural areas, similarly to those seen in most other developed countries.

As shown by Figure 1, the circulation of newspapers per inhabitant has been decreasing consistently since 2000 in all four Nordic countries displayed. While the decline has been about equally steep across the board, the level of circulation has been the lowest in Denmark since the start. As a matter of fact, however, all the Nordic countries retain a relatively high level of press circulation, compared to other parts of the world. Norway displays a level hardly seen anywhere else (Hatcher and Haavik, 2014). Part of the picture is a higher number of newspapers, applying per capita as well as their regional diffusion and embeddedness in regional context. The situation reflects high autonomy for regions and the country's more active regional policy, especially compared to Denmark or Finland.

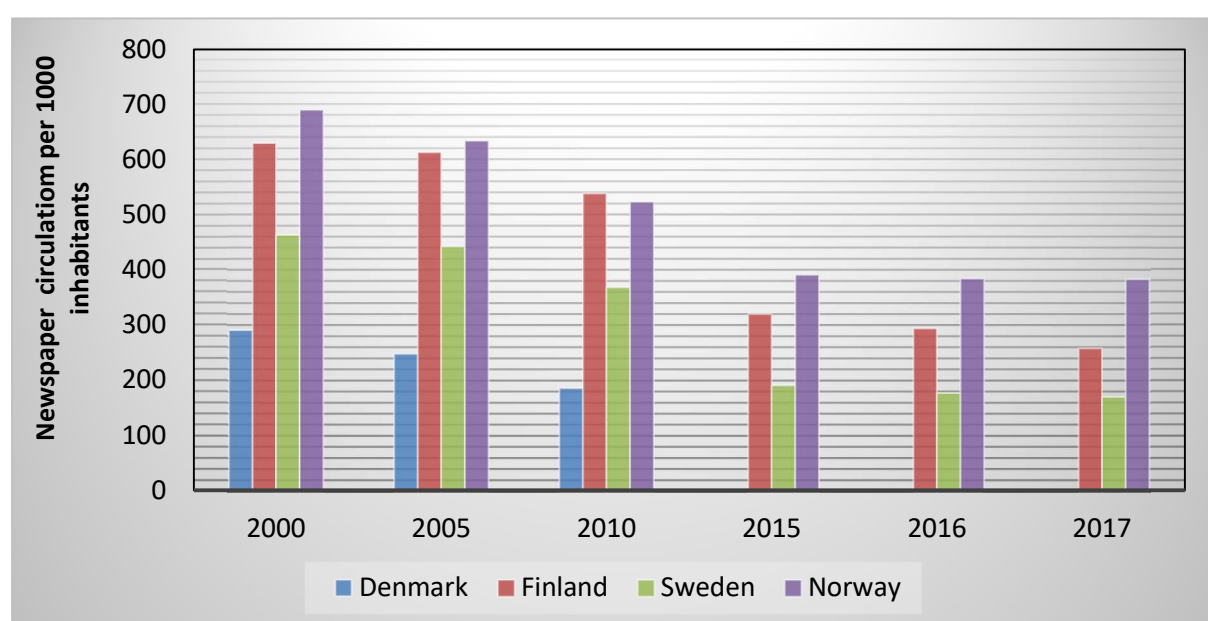


Figure 1: Nordic Press Circulation (Harrie, 2017)

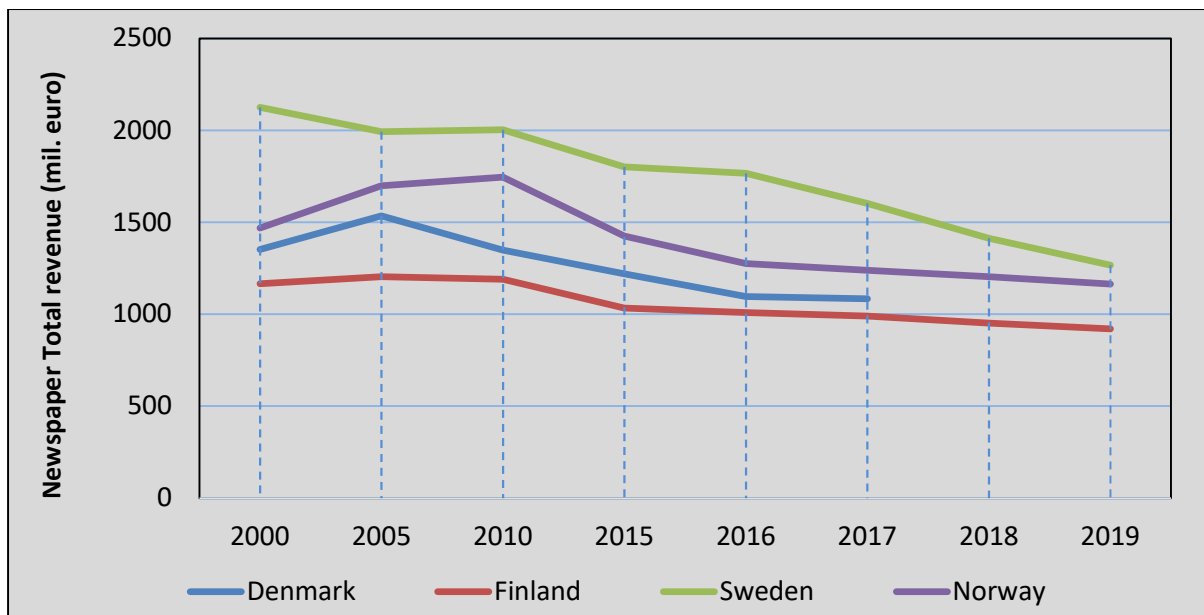


Figure 2: Newspaper revenue (Nordicom, 2021)

Figure 2 is underlining the significance of the decrease experienced by the newspaper industry. From 2000 to 2019, the produced revenue in newspaper sales experienced a downfall of more than 1 million EUR in Sweden, and similar trend in Denmark, Finland, and Norway.

2.2 Broadcasting

Over time, printed media experienced a significant decrease in the number of subscribers, partly associated with the rise of broadcasting services. This applies both to the advance of services that have underpinned increased audio listening, which gradually have become more accessible and convenient to listen to via both Radio and TV channels, and partly to exposition of viewing Television. In recent years, with the emergence of the internet, broadcasting has taken on new dimensions and reached an unprecedented audience.

In contrast to the market for newspapers, radio had been dominated from the start, within each Nordic country, by a single public provider and network, handling both national and regional coverage. While multiple competing providers were gradually allowed, private entries naturally focused on entertainment. No competition arose in regard to news, or in terms of national commercial radio either. The development of digital radio, initially attempted, was halted in 2006, in the face of weak demand. New listeners have instead been reached by streamed radio or radio-on-demand.

Innovations have targeted niche groups, particularly among younger cohorts, but news over radio in the Nordics remains singlehandedly provided by the national public service channels. Daily listening has nevertheless remained high in the Nordic countries, at up to eight in ten on average, although with Finland at a lower level. Additionally, in all the Nordics, some three quarters of radio audiences listen to national radio. These numbers stand in a stark contrast to most other countries, including in southern Europe where public providers are in a weak position, while the share of the population listening to radio tends to hover around only two out of ten (Harrie, 2013). Figure 3 is indicating the radio listening time in Denmark, Finland, Sweden, and Norway. In all four, listening time decreased from 2000 until 2019, with the biggest drop recorded in Denmark, corresponding to 90 minutes less listening time per day. In this case, the numbers have held up the most in Finland.

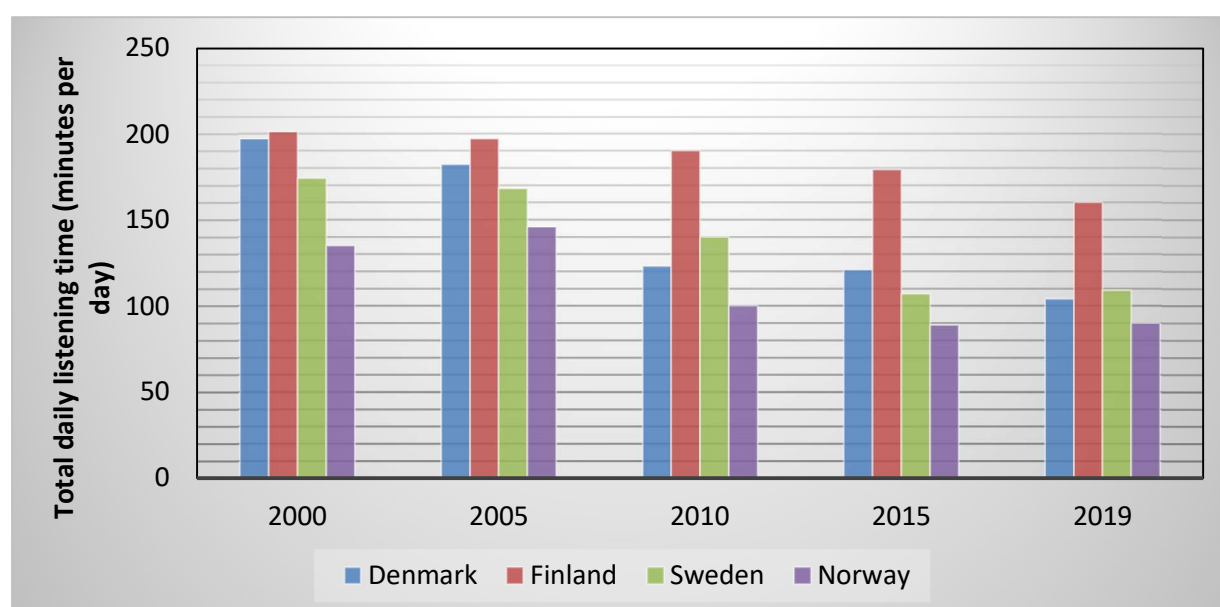


Figure 3: Average daily radio listening time (in minutes) (Nordicom, 2021)

A more complex development is observable in the number of radio broadcasting enterprises, displayed in Figure 4 for the total of both the public and private sectors. In Norway, the total number, which was very high to start with, declined markedly from 2000 to 2018. An equally consistent but less dramatic decline occurred in Denmark, whereas Finland and Sweden experienced a slight rise of radio broadcasting enterprises from 2010 to 2015, followed by a small decline. Nevertheless, the trends displayed by all four countries feature a diversion in consumer behaviour from listening to the radio for around 200 minutes per day in 2000 to around 120 minutes in 2019 in

Denmark, Sweden and Norway. Interestingly, Finland, where listening time held up the most, had the lowest number of enterprises, implying a higher market concentration.

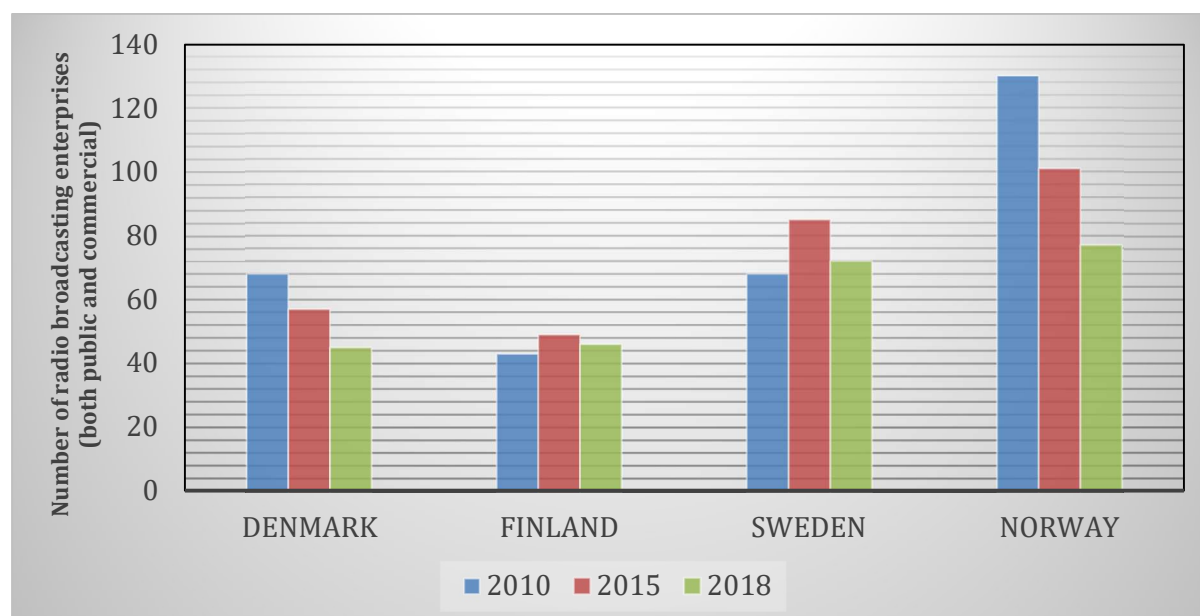


Figure 4: Number of radio broadcasting enterprises (public and commercial) (Eurostat, 2021)

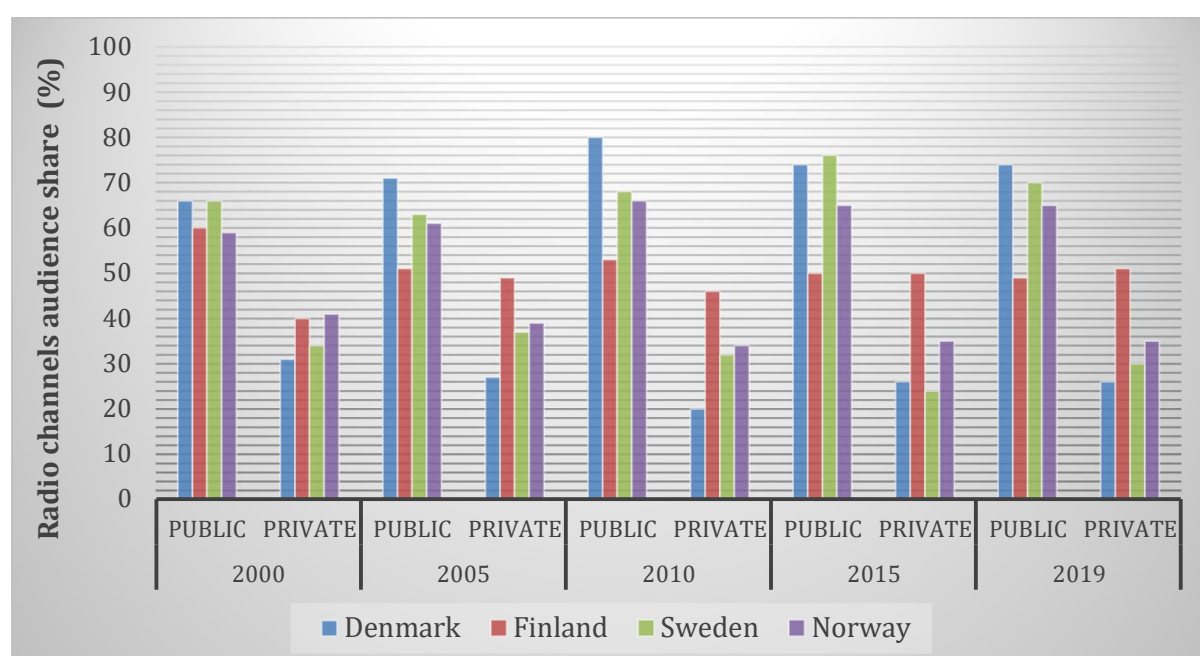


Figure 5: Radio channels audience shares, public and private sector (Nordicom, 2021)

Figure 5 illustrates how the distribution of audience shares, between public and private radio, has changed over time. Interestingly, public radio has basically maintained a

dominating position over the past two decades, except in Finland where public radio attained an equally strong position by the turn of the millennium but has since seen a much more even standing between listeners of public vs. private radio.

A similar share of the population, around 80 percent, watched television in the Nordic countries around the turn of the millennium (Harrie, 2013). As can be seen from Figure 6 though, the daily reach of public television has subsequently declined. This applies especially in Sweden, and almost to the same extent in Norway and Denmark. Finland has seen a smaller shift. In Norway, the decline came late. Meanwhile, it is worth noting that Norway invests more than the other Nordic countries in public service provision of news and, together with Iceland, has the most dominating individual such provider, NRK1 (Olsson, 2015). The onset of digital TV channels does not set the Nordic countries aside from others in terms of numbers, but the way competition has been managed, as well consumer behaviours, nevertheless continue to display differences.

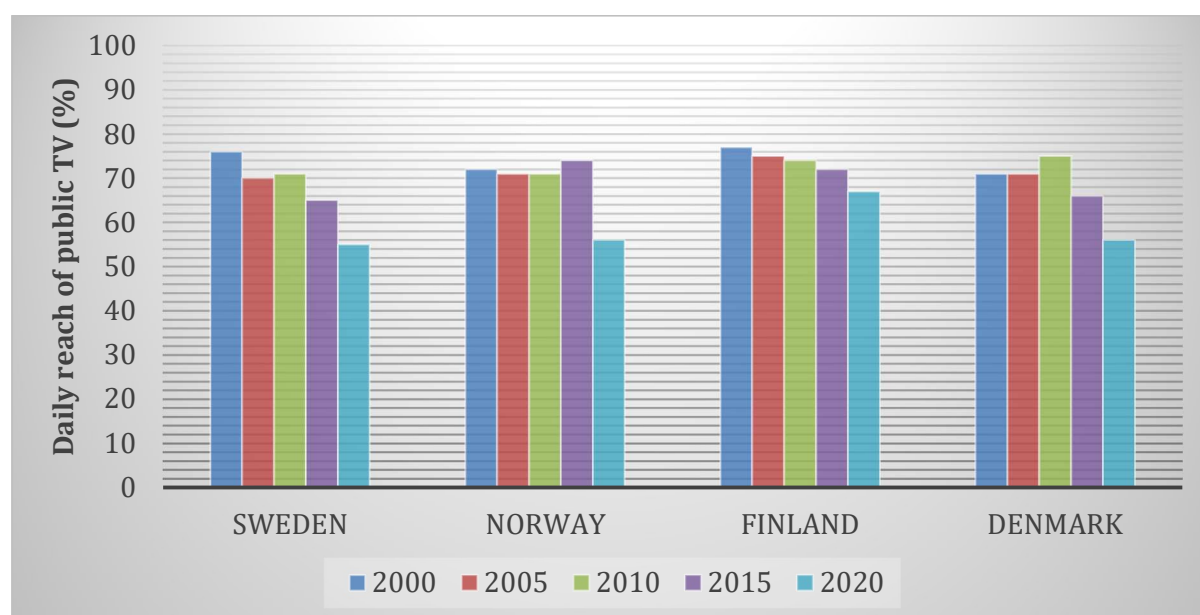


Figure 6: Daily reach of public television, as % of population (Nordicom, 2021)

An important difference between the Nordic countries and Southern Europe has to do with the timing and extent of deregulation. In Sweden, with the arrival of commercial satellite channels a debate on allowing advertising on terrestrial services started. Eventually, it was decided that a commercial channel would be allowed to broadcast terrestrially. In Southern Europe, commercial television went through an extensive deregulation already in the 1970s, when satellite technology arrived. Determined

policymakers in the Nordics in essence tried to maintain the old order of dominating public broadcasting monopolies (Nord, 2011). Even as the first commercial terrestrial television station could open in 1991, competition remained firmly restrained. As satellite and cable TV became highly accessible, however, the Nordic stance had to adjust. At the turn of the millennium, Sweden fast-tracked digital terrestrial television (DTT), from 2007 nation-wide on a government-owned network.

In order to arrive at a more precise understanding of viewer behaviours, however, Figure 7 additionally presents more detailed information on TV viewing time, in terms of average minutes per day spent across different age groups in the Nordic countries. The increase in time spent on watching TV that occurred from 2005 to 2010 appeared in most age groups across each of the Nordic countries (only young adults in Finland and Sweden went against the trend). In the years since then, however, average viewing time has declined quite markedly. The age group (4-9) peaked in 2010 throughout, after which its viewing time fell sharply, staying relatively unchanged only in the case of Finland. The age-pattern in Finland differs somewhat from the others in the way that young adults diminished their viewing time more dramatically after 2010, and also for the eldest age group, where the tendency of watching TV has kept increasing more than in the other Nordics. Across all the Nordic countries, however, the viewing time of young adults having declined by 2020 to only some 25 – 40 minutes of watching television, while the age group +60 watched TV between 268 (Norway) and 324 minutes (Finland) on average. All countries display a lower average TV viewing time in 2020 compared to either 2015 or 2005, although the elderly viewers have gone the other way and increased their viewing time.

About a quarter of all television viewers keep using public TV in the Nordics, while three quarters of radio audiences listen to national radio. Both radio and TV are widely viewed in the Nordics as closely associated with communication services as a public good, a cultural policy extended to media. Unlimited reach of commercialisation has been energetically resisted, and editorial freedom is taken seriously. Along with the BBC in the UK, Denmark's DR1, YLE in Finland, RÚV in Iceland, NRK in Norway, and SVT/SR in Sweden keeps evolving with a universal orientation

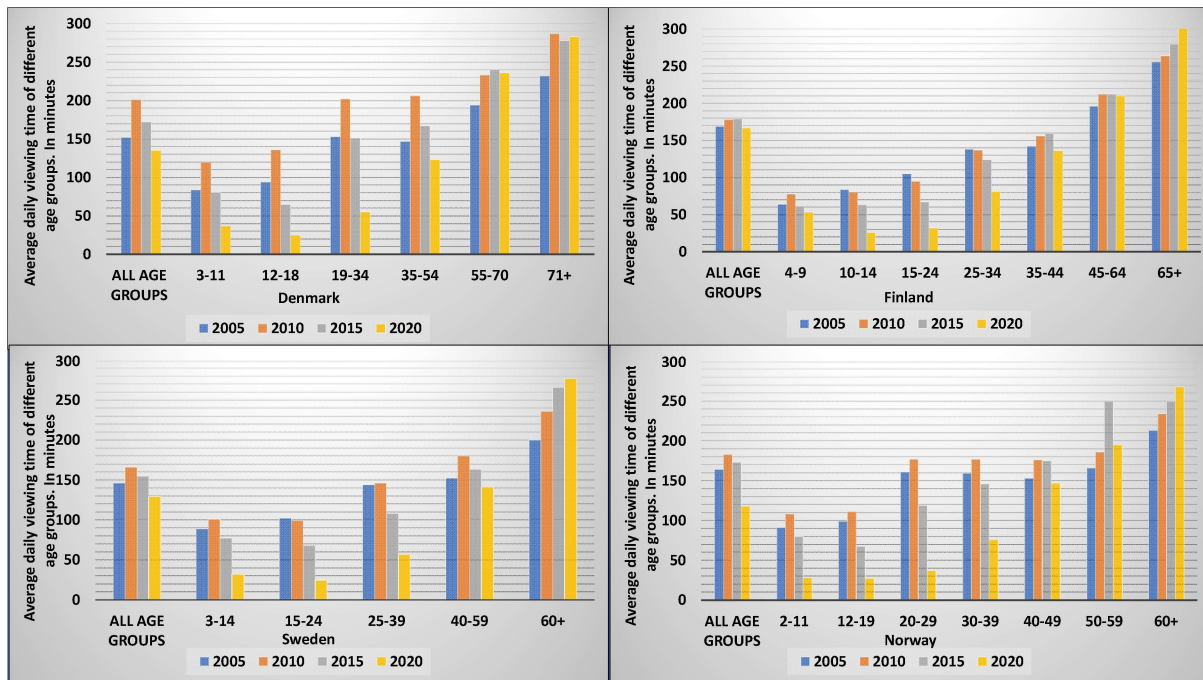


Figure 7: Average time of viewing TV across age groups in the Nordic countries (Nordicom, 2021)

3. Digitalisation and Transformative Change

The arrival of digitalisation, although rolled back in the case of Swedish Radio, nevertheless represents a generic cross-border influence, spanning advertising online, accessing user data, interactivity with users, social media, and so forth. The consequences apply to all regions. In the Nordic media landscape, however, the transformation did not happen by chance, but clearly reflect the particularities of the Nordic corporatist model. Here, we initially take stock of some main developments, before turning to the changes in consumer behaviour.

3.1 Manifestations of Change

While the adoption of digitalisation in television around the turn of the millennium expanded the portfolio of niche channels, the development was basically controlled and actively coordinated for the purpose of transforming the Nordic public service broadcasters (Nord, 2011). They all introduced new services online and adopted far-reaching changes both to diffusion and content. The concept of “public service broadcasting” has since been applied as an umbrella term that spans television and radio as well as online services (Syvertsen et al., 2014).

Some main patterns and trends in the use of different media outlets across Denmark, Finland, Sweden, and the remaining EU28 countries combined, are outlined in Figure 8. Most Nordic citizens access media content each day using the Internet. In the remaining EU28 countries, people watch TV on a TV set and via the internet or watch TV only on a TV set or use the internet for information and entertainment purposes. Interestingly, some 59% of the population in Sweden and Finland still read the written press on a daily basis.

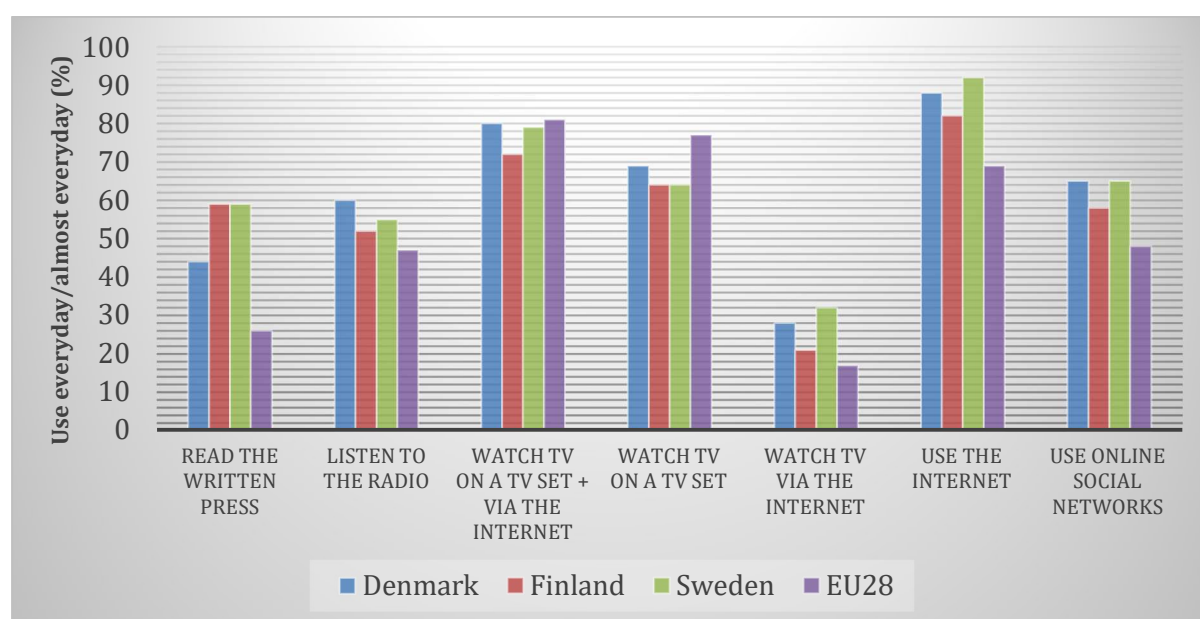


Figure 8: Share of the population aged 15+ who use different media every day/almost every day (Eurobarometer, 2021)

In media industry, digitalisation has brought new practices mainly along two major trajectories: i) in regard to the redistribution of programs and; ii) the production of a diverse range of original online content from digital games to weather forecasts. Through both channels, digitalisation exerts major impetus towards far-reaching re-organisation as well as an alternation of outputs, including with regard to content. These include what is published, how it is portrayed, how is it sourced, etc. The impact is interlinked with changing dynamics, often in regard to funding, competition and commercialisation, as well as political and social movements.

An early example of relevant transformative change was the 1995 launch in Stockholm, of the first free newspaper, Metro, pushed through by Jan Stenbeck, the Swedish entrepreneur who founded MTG (Modern Times. Group). Metro shocked the

established press at the time, even more so as it went on to become not only the newspaper with the largest circulation in Sweden, but also to succeed in 18 other countries. By 2011, Metro was the leading freely available newspaper in the United States, for instance¹. Neither Metro nor other free newspapers were ever introduced in Norway, however. In the end, this industry has largely run out of steam. Metro itself closed in 2019, after 24 years, and other free newspapers similarly struggle, if they any longer exist at all. Yet, their impact has lingered, and probably more in Sweden than anywhere else, as returned to below.

Meanwhile, the rapid expansion of broadband and 3G, at a time when the Nordics led the world in ICT, meant that many users transitioned from traditional news to the Internet. Media, including individual journalists, had to cope with a landscape staged in rapid transformation (Nygren, 2008).

We may identify various alterations to the fundamental limitations that thus far had been imposed on journalism: i) suddenly, providers of information met with no space constraints; any amount of words, accompanying photos, or links to various sources, could be concocted; ii) Anyone could show up as a provider and sender of information; iii) continuous publication, content could go live at any time iv) interactivity, not only did immediate feedback from readers become possible, but readers would let their views be known and further add to the material, which may continue to evolve; v) limits to duplication and repetition evaporated, material already published could reappear, and appear again, replacing the production of new content, and; vi) social media opened up for an endless flow of new expressions creating and sharing observations, feelings, ideas, and opinions shared among the likeminded with virtual communities.

An analysis of advertising/marketing expenditures provides further evidence in the ongoing shift towards online advertising. The level of expenses measured in relation to the population and how it has changed over time, is demonstrated in figures 9 to 13 across the main media channels in the four Nordic countries for which data is available, along with comparisons for selected other European countries. As can be seen,

¹ <https://www.businesswire.com/news/home/20110613006428/en/Metro-Newspaper-is-the-1-Free-Daily-Newspaper-in-Boston>

advertising expenditure have been subjected to sharp reductions in newspapers (Figure 9) and magazines (Figure 10) going back to 2005. Given the strong standing of newspapers in Nordic societies (cf. Chapter 4), however, the amount of advertising expenditures started out correspondingly high in 2005. Even after the decrease of expenditures over the past decade and a half, advertising expenditures were relatively high in these countries, with the highest amount in Finland at almost 60 million euro per year.

For magazines, the situation is quite similar, with the Nordic countries starting out with higher levels of expenses which still remained on the higher end in 2019 compared with the other European countries. In contrast to the newspaper and magazine market, however, Figure 11 points to much less of a change in the level of expenditures allocated to advertising in television. This applies both to the Nordic countries and most of the others displayed (Portugal, experiencing a big increase, being the exception). A likely reason is that some financially strong companies, in any market, continue to see value in reaching some consumer segments by advertising at commercial TV programme breaks.

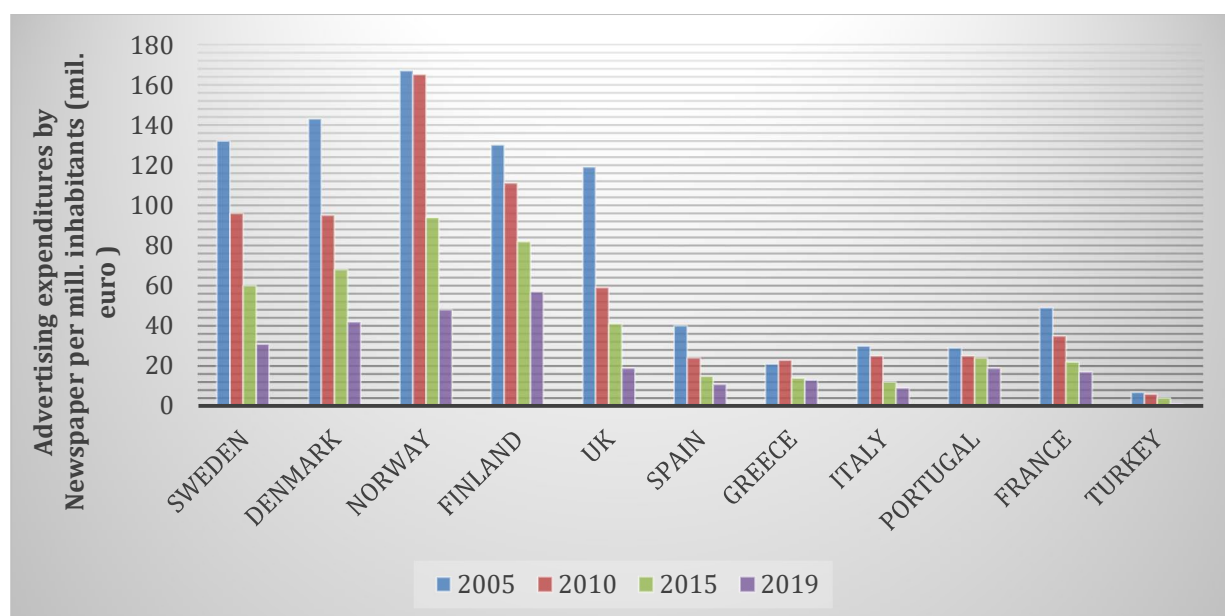


Figure 9: Advertising expenditure in Newspapers, Ascential Events (2021)

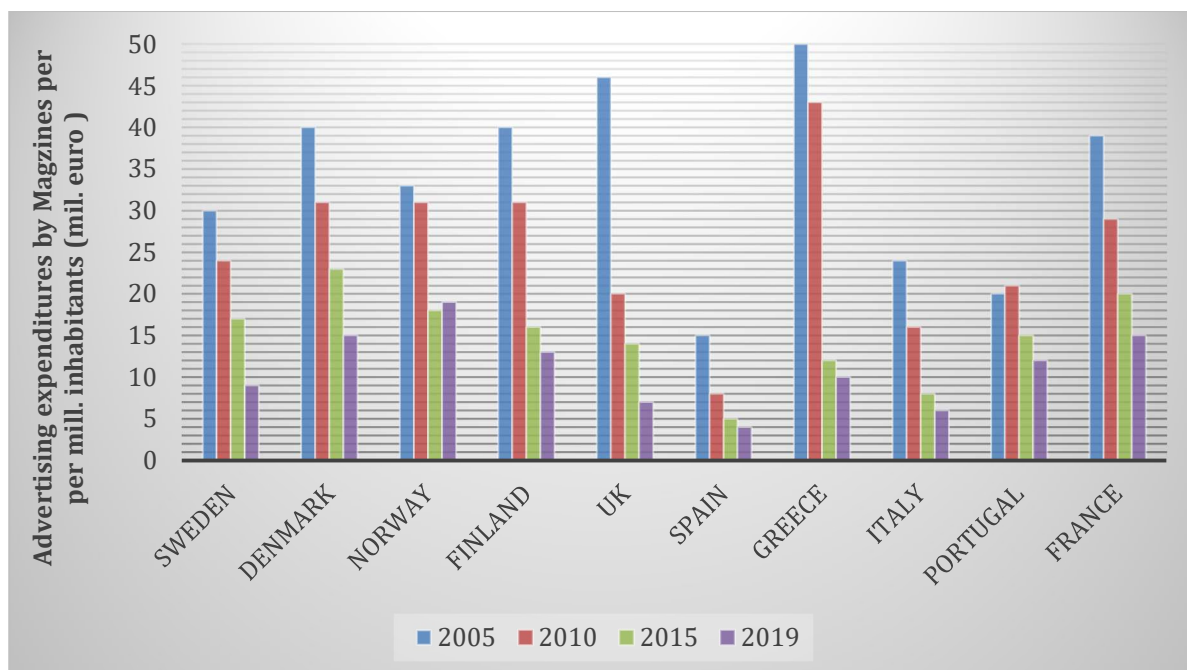


Figure 10: Advertising expenditure in Magazines, Ascential Events (2021)

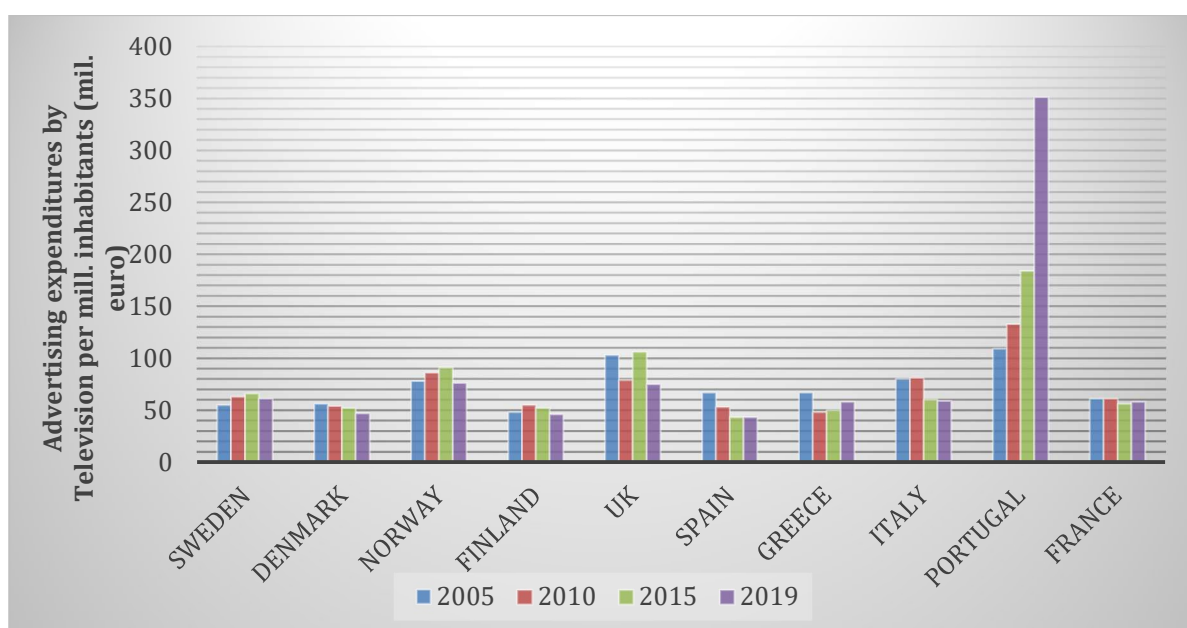


Figure 11: Advertising expenditure in Television, Ascential Events (2021)

The development of online marketing expenditure, displayed in Figure 12, is a totally different story. For all countries, the levels increased from 2005 to 2019. The Nordics, together with the UK, are much ahead, however, with the highest growth rates and presently much larger investment in digital advertising.

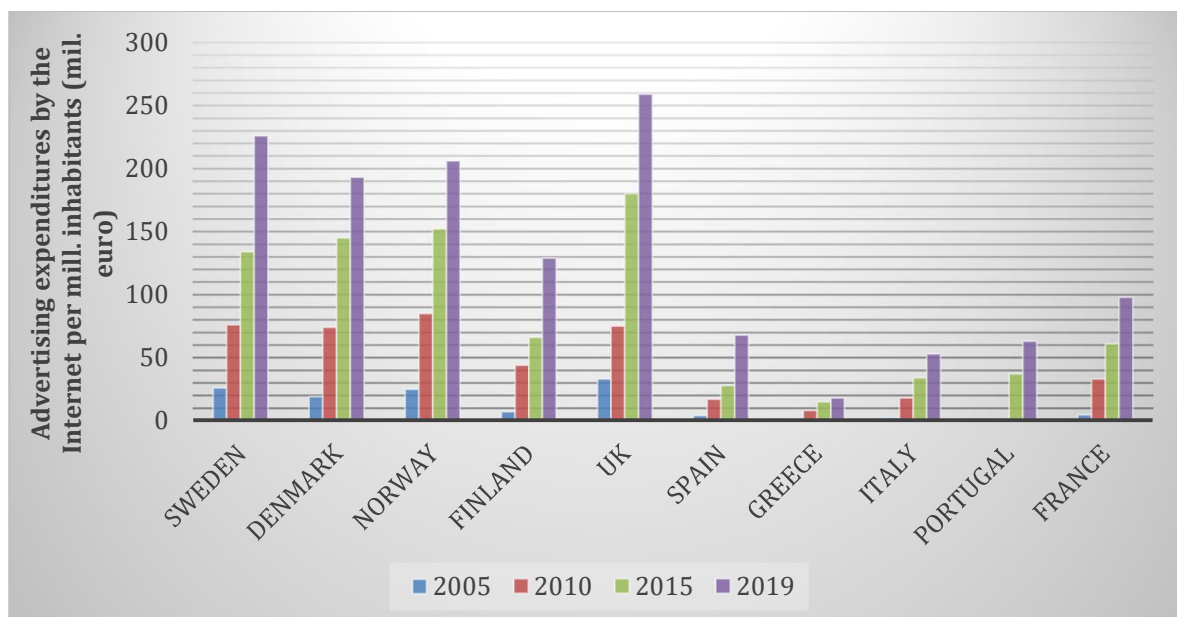


Figure 12: Digital Advertising Expenditure, Ascential Events (2021)

Finally, adding up expenditures across the various channels, Figure 13 shows that the total marketing expenses in the Nordics have been at the quite high level throughout the studied period and have continued to increase. They remain at a relatively high level, on par with the UK and higher than in the other European countries.

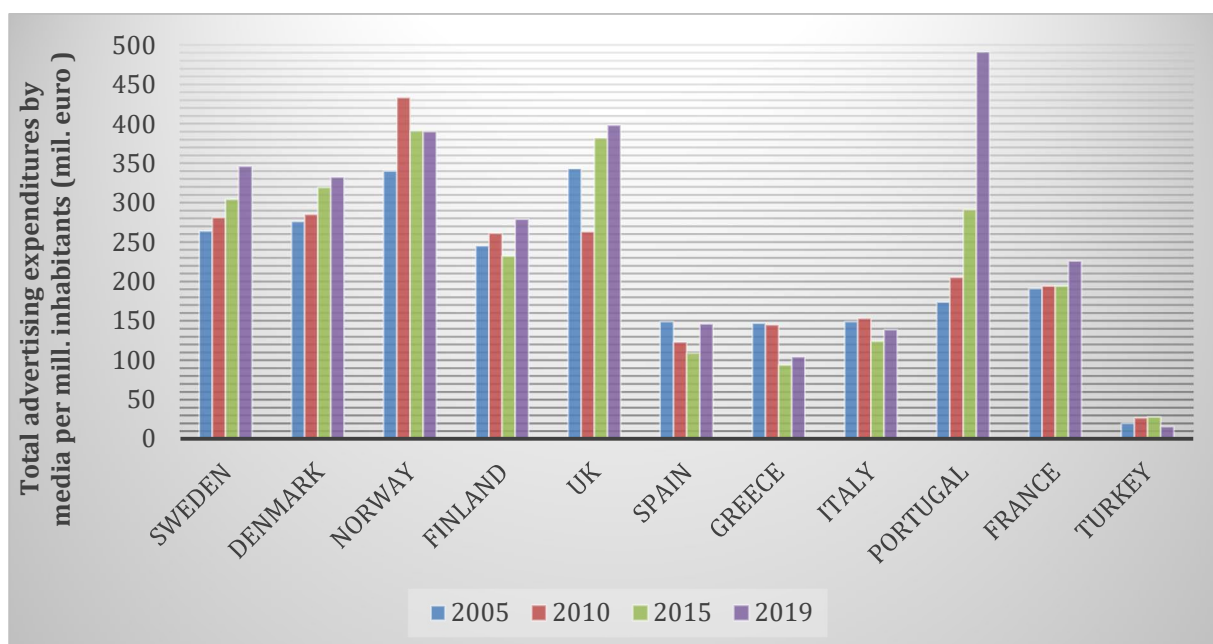


Figure 13: Total Advertising Expenditure, Ascential Events (2021)

3.2 Changing Consumer Behaviours

Under way is a major shift in news consumption away from public media and the press to the Internet and social media, as well as from time devoted to consuming news towards locating desired information through other means, and also entertainment. The global penetration of social media reached some 54 percent in 2020.² In parallel, the attention span of customers/citizens, has famously declined, so that humans have been found now to have a more limited attention span, down from some 20 seconds on average a few decades ago to only 8, which has been found to be less than that of a goldfish (9 seconds).³

While it has become possible to connect and interact with readers anywhere, anytime, priority would in many cases be placed on packaging that is suitable for such circulation, short messages, photos, attention to events and individuals suitable for immediate recognition. In this context, many observers have pointed to a recurrent crisis for journalism. The number and size of news organisations around the world have been subjected to massive rationalisation (spanning printed press as well as broadcasting), accompanied by a loss as well as a transformation of jobs, and downward pressure on salaries. While many professional journalists have been laid off in departments that used to be dedicated to news in the traditional sense, other lines of business have proven to offer more lucrative career paths. A case in point is the media landscape of the United States, where a combination of technological, economic and political upheavals is at play (Kamarck and Gabriele, 2015; Siles and Boczkowski, 2012). The consequences for the journalistic profession have arguably been dramatic. Williams (2017) found that the salary of journalists relative to PR specialists was virtually collapsing in the US between 2004 and 2013.

Developments in the Nordic countries feature certain commonalities to what has unfolded across the Atlantic, but with less dramatic consequences to show for it. As we have already seen, the main newspapers acted decisively on digitalisation to build their own successful strategies for improving reach and service to customers online.

² <https://www.statista.com/markets/424/topic/540/social-media-user-generated-content/#overview>

³ <https://time.com/3858309/attention-spans-goldfish/>

The process involved polarisation with the local and regional press which clearly lost ground, although much of it remains in business in part due to public support.

Figure 14 provides an indication of this changing consumption trend from reading physical newspapers towards online news, as reflected by a rapid consistent increase in share of news consumed online that is paid for, across. As can be seen, within just one year (from 2019 to 2020), the share of online news content that was paid for increased significantly.

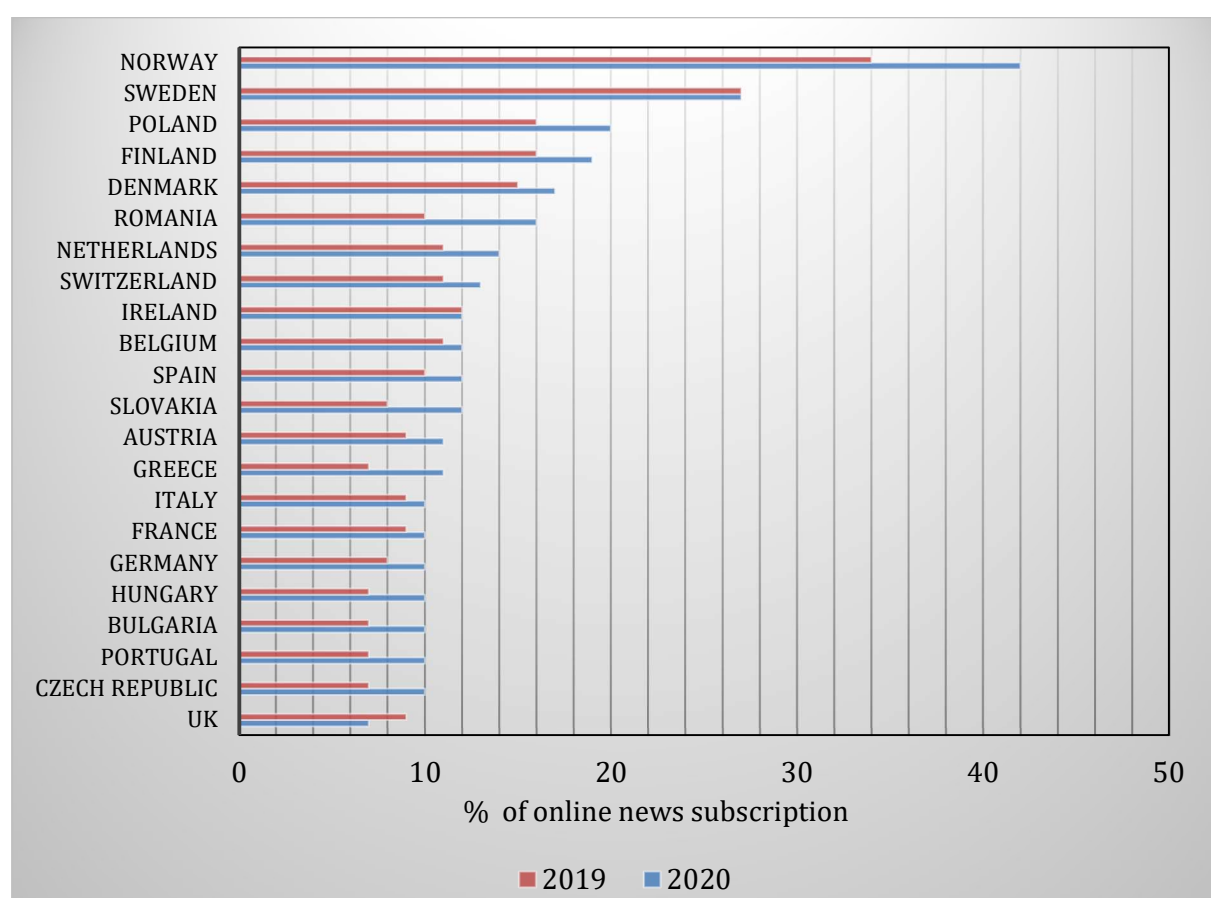


Figure 14: The share of online news that is paid across countries (Nordicom, 2021)

The journey from the analogue media publishing to the digital in the Nordic countries takes on a specific route via the TV-channels making news-feed available on Text- TV and the emergence of free daily newspapers, already commented on. The latter development set off with the launch of Metro in the mid 1990's, played its part in driving a shift in news publishing content with shorter articles focusing on reaching as many readers as possible (so as to increase advertising revenue) instead of numbers of subscribers. The readers became used to an abundance of news for free; easy to digest and to get. This paved the way for the online news, which in its infancy got its

content by recycling editorial material from printed newspapers. However, as the established actors in the traditional news media understood that online news channels have come to stay, those became more dominant also in the digital media. Journalism as well as content has changed so as to adopt the key features of online news production; unlimited space, continuous publication, and interactivity, in many cases referred to as a specific form of online journalism (Syvertsen et al., 2014).

As for television, since the mid-1990s, the Nordic public service companies have increased their range of services using an overriding strategy that spans particularly TV and online communication. Their mandates and policies have largely tied them to making the same content available on their various platforms, in ways that enable as many people as possible to access and benefit from their programmes and services. The public services offered online is generally fully on par with what can be found on their radio and TV platforms, including news. Content is offered both as streamed real-time radio or TV and the spectrum of on-demand web and social media services.

An overriding trend leads towards the convergence of content across the media platforms. There is also a trend towards increased commercialization, which in turn links to more streamlined content. As publishing actors become financially dependent upon advertisement and the means to attract advertising revenue are strongly connected to the number of readers as well as number of targeted reader groups, the news content will be shaped as to suit the mainstream. Hence, language will be more informal, sentences shorter and vocabulary less varied. Meanwhile, international observers have concluded on this combination leading to increased participation in media publishing and content development (Carpentier et al., 2013). Regulation – or the absence of it - is a factor, since the production of digital news content is subjected to other (less) rules than what apply in regard to analogue publishing. So far, the former can mostly rely self-regulation, which is less limiting (Hulin and Stone, 2013).

In the Nordics, however, new actors operating outside the regulatory reach have been few and far in between. New platforms and new media seldom replaced the incumbents. The traditional media companies are rather in the lead when it comes to making effective use of new means and new platforms. Having said that, new forms of interaction are taking shape, including the emergence of new successful ‘mixed’

platforms such as web-TV, radio podcasting, and online editions of newspapers. Further, important changes occurring in media organisation, alter the balance between different kinds of journalism, as well as kinds of professionalism. For instance, in the case of “arts journalism”, which used to cover “high” arts in contrast to “popular” arts, a paradigm shift had been documented, with arts journalism shifting from an aesthetic to a journalistic paradigm, leading to less scope for specialisation and autonomy (Sarrimo, 2016). The combination of digitalisation and enhanced concern with commercialisation is at play. Meanwhile, the focus on a narrow already pre-defined elite as given way to the effort of expanding the readership, and a broadening of the concept of culture (Jaakkola, 2014).

With the onset of COVID-19 and the subsequent lockdowns, much of the experience-based industry has been brought to its knees, causing a dramatic drop in advertising for media companies. Following an intense debate on media subsidies, the outcome was direct state support for private news media in all the Nordic countries to the record tune of €275 million, about a third of it in the form of special pandemic funding. State funding for private news media went ten times higher per capita in Sweden and Denmark compared to Finland. It is interesting to note that, during the pandemic of the last few years, bigger audiences have been observed in the Nordic countries for both public-service and private news media, compared to other countries.

3.3 Changing News Content

Analyses of the way digitalisation impacts on content are ongoing. As for overriding impacts, some argue that shifts have served to reduce depth in coverage of politics and public affairs (Petersson et al., 2006). Comparing coverage of politics over time by media in Sweden, Strömbäck and Nord (2016) observe a shift towards more emotional and personal journalism, but they refute a notion of any significant change in coverage. Interestingly, negative messages dominate positive by approximately 6:1, a relation that remained stable over the studied period. In the case of news specifically prepared for publication online, some observations regarding source are worth highlighting. For instance, the male dominance in the Nordic countries, when it comes traditional news reporting, noted in Chapter 2, is less present. While hard data is not available, in news prepared for digital publishing the share of women appears to

approach 50 percent. On a separate note, the available evidence indicates, that digital news is more impacted by political partisanship. In material prepared specifically for digital publishing, both the way in which an issue is framed and the way a newspaper interprets or approaches it, appears more affected by a news organisation's political history and traditions (Allern and Blach-Ørsten 2011). A possible interpretation is that news organisations leave more scope for variation to what goes online. More research is required in this regard, however, including on differences between platforms. There is also the question to what extent such patterns and trends apply to the Nordic countries specifically or are also more generally valid.

Research on media content in the Nordic countries has further aimed to examine changes in various characteristics as a result of the digital transformation vs. other explanations, such as urbanisation, demographic development, changes in education or socio-economic structures, etc. It was found, for instance, that news about politics increased in each of the capital regions, in contrast to other regions. At the same time, political news displayed a shift in that it has become more personal and emotional. Politics is still the content type which takes up most space in media publishing. The media coverage of criminal acts, meanwhile, has been given less space, and particularly in urban areas (Karlsson et al., 2016; Weibull et al., 2020)

Media coverage of incidents with short time span such as accidents, abrupt conflicts have a given place in tabloid press but less so in daily newspaper and public broadcasting. The same pattern prevails for sports and entertainment news. Radio remains the key media channel for sports news and coverage of sports events. An interesting trend in recent years is that weather and politics have been awarded generally increased space, which may reflect increased interest in climate change and governance. Coverage of sports has become more important for commercial channels. Attention to crime has diminished across all media channels. Broadly speaking, the magnitude of changes in content has been greater and faster online compared to traditional media (Karlsson et al, 2016).

Media researchers have identified other concrete adjustments as well. For instance, the number of articles in mainstream Swedish newspapers that display visual images more than doubled between 1990 and 2010 (Andersson, 2013). In their web-material,

instantly filmed videos increased sharply, changes which have been demonstrated in other countries as well. Freely available press, such as Metro, picked up use of images online to a particularly high degree. In radio, still hardly existed by 2007 but was found in two-thirds of the material by 2014 (Nilsson et al., 2016).

4. Trust in the Media

To what extent content, or a message, can be conveyed from a source to a recipient, naturally hinges on a range of factors such as language, format and syntax, which influence to what extent the message can be understood. Adding to that, an aspect of high importance has to do with the extent to which the recipient trust the source.

4.1 Varying Levels of Trust

Which institutions enjoy high trust varies between societies. In many, the highest trust levels are enjoyed by police and military, and possibly the courts. Radio and TV belong to those that tend to follow suite, whereas social media usually ranks lower, with political power near or at the bottom (EBU, 2020).

In the context of this report, interesting questions appear on the underpinnings of citizen trust in the media, how the Nordics compare with other regions in this respect, and what changes are under way. A relatively high reliance on public television for news and newspapers for public information in the Nordic countries, means that political actors mainly communicate with the electorate through the news media. Since paid political advertising is banned in the mainstream media, the political actors in the Nordic countries are dependent on news management skills in communicating with the electorate.

While trust is often referred to, it is a somewhat evasive term that may be interpreted differently depending on context. Generally, trust is defined as a personal perception regarding the reliability that can be placed in other people, or in organisations. For trust-building, regulatory conditions and actual behaviour matter, as does perception.

In the rise of modern media in western societies, trust stood out as a key differentiator from the propaganda machines of the past, or of contemporary autocratic regimes. It

was essential for news to be transmitted with a sense of impartiality, credibility, and authenticity. Regulations were set out on this basis for the traditional legacy media (print, radio, and TV), with the broad terms stipulated by international law. Registration as “media” was mandatory for recognised under the supervision of a governmental agency devised for the purpose. Media companies were required to hire only licensed journalists to handle “journalistic” activity. The objective was civil and penal responsibility for the media. In some EU countries, the material scope was limited to audio-visual media services defined by the AVMS Directive, while for others specific media laws established particular administrative obligations, e.g., to enter a public register or subject to specific content regulation.

With the ICT revolution, new media channels and news outlets have been introduced, notably online platforms and social media. They reproduce the same practices. In principle, their organisation, legal, ethical, and deontological frameworks fall also into the concept of news media. As already noted, however, in some respects, e.g., content and sourcing, the situation is less clear. Further, the cross-border nature of online communication means that national regulation becomes irrelevant in some cases. Perceptions, again, is another thing. As already noted, Europeans overall retain more trust in traditional media compared to news transmitted via Internet channels, and this applies even more to people in the Nordic region (EBU, 2020).

The knowledge revolution has brought a range of challenges for the perception of media’s reliability and accountability. Around the world, governments, multilateral institutions, businesses, and so forth, commonly find themselves in a position where they enjoy weak public support. Few countries have acted to ensure the integrity of cross-border policy frameworks in protection of reliable and trusted media, although the European Union have acted on various levels to protect privacy and integrity, of high value to trustful management of data.

With the arrival of ICT, digitalisation and social media, user-generated material has grown in importance and led to a blend, so-called popular journalism (Hujanen, 2004). As one element, editorial professionals have been exposed to new kinds of raw material. Interestingly, the higher representation of women in the reporting of news online, compared to traditional media. On average, the share of stories on news

websites reported by women in 2015, was about five percentage points higher than the share of traditional news reported by women. Some points to a trend that political action increasingly explained and reasoned by opinions and provoked by emotions rather than based on factual truths (Kassab 2016). While opening for new possibilities, journalistic challenges arising from more subjective and opinionated inputs. Journalistic norms of objectivity, impartiality and accuracy, hallmarks of the Nordic model, meet with new challenges in this context.

The Nordic countries stand out as highly similar in a range of aspects that are key for the knowledge society; innovation, happiness, governance. Closely relating to these, trust in radio, and TV, is very high in the Nordic countries. Comparing with others, the Netherlands generally presents the closest profile, while Germany, Switzerland and Estonia present similar numbers in specific respects. Most of the mainstream rankings, such as those of the OECD, the EU, the World Economic Forum, EBU's Media Intelligence Service (MIS), and the Global Media Monitoring Project (GMMP).

Examining the developments in media rankings more closely, however, certain differences appear between the Nordic countries, and there are also some clear-cut changes appearing over time. The following are some of the main trends in regard to trust, that apply for the Nordic countries, and, to a varying extent, more generally/for other regions:

- Trust in written press, particular the mainstream daily papers, maintains a strong position, and even increases in many cases;
- Trust in public service television is also relatively high, although less than what applies for printed papers (more so in the Nordic countries than elsewhere);
- Trust in the Internet is relatively weak, including social networks (particularly in the Nordic countries).

Further, most Swedes consider the state-owned SR - "Sweden Radio" - as the most impartial and credible news channel, followed by other publicly owned channels. The other Nordic countries, and also the EU as a whole, largely display the same order of things, although with the highest trust placed in public media institutions followed by the written press. Finns have the highest trust levels and Danes the lowest among the

Nordics. Basically, all express the least trust in the News broadcast on the Internet and social media, but the Nordics make a bigger distinction in this respect, compared to the European average. Figure 15 compares the trust profiles of the three Nordic countries referred to, and also the average for the EU28.

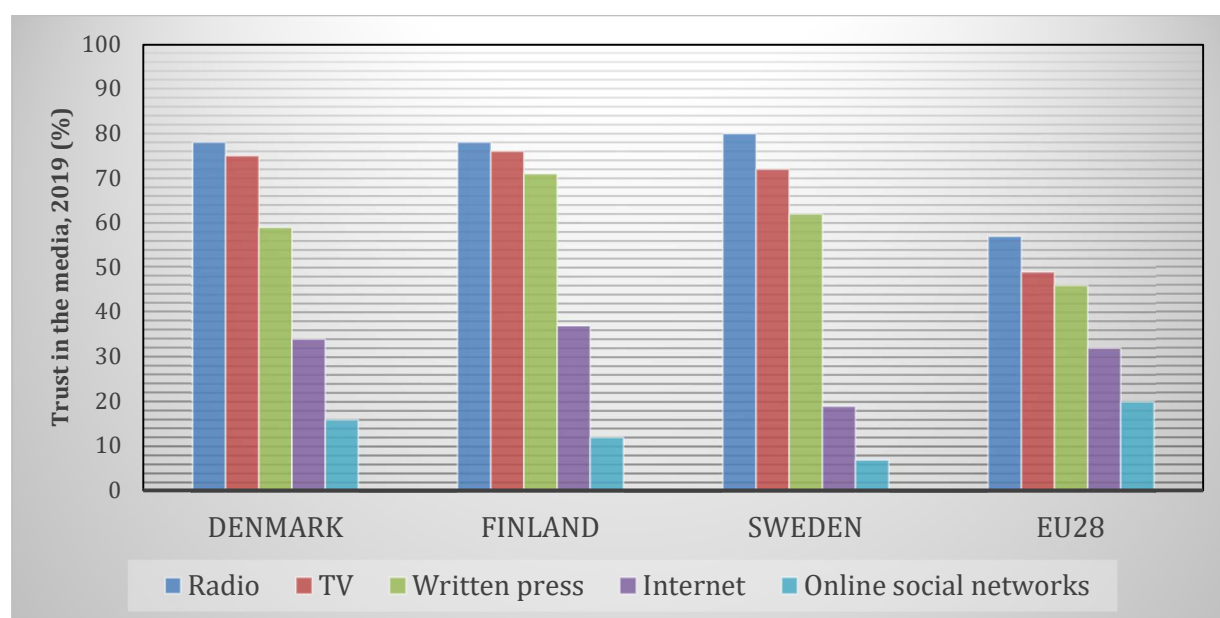


Figure 15: The share of the population that express trust in the Media, (EBU, 2020)

According to a study conducted in 2020 by the Reuters Institute for the Operating Eurovision and Euroradio report, there is a significant decrease of trust in social media (SoMe) platforms across Europe.⁴ In the Nordics, the non-transparent use of data and ambiguous profiling of user behaviour is contributing to the lack of trust in SoMe. The radio is being viewed as the most trusted medium, scoring highest in 24 out of 33 (73%) of the countries surveyed. The Nordic countries have in comparison to other European countries proven to show a high level of trust in national media with at least 50% of citizens agreed with the statement that their national media provided trustworthy information⁵. This stands in sharp contrast to three of the biggest markets in Europe - Spain, the UK, and France - where a low level of trust was found.

In other words, there is a tendency for the populations in the Nordic countries to retain high trust in traditional media and place lower trust on the Internet and social media.

⁴ https://medienorge.uib.no/files/Eksterne_pub/EBU-MIS-Trust_in_Media_2020.pdf

⁵ https://medienorge.uib.no/files/Eksterne_pub/EBU-MIS-Trust_in_Media_2020.pdf

Trust in the latter is diminishing everywhere in Europe as well, but more so in the Nordics. Other countries display considerably less trust in established media.

On this basis, fundamental differences can be observed between the Nordic countries compared to others, when it comes to the determinants of trust. No doubts this reflects the particular origins of the Nordic model and how it has operated over time. We can surely conclude, although parts of those earlier typical features characterising the Nordic corporatist model are no more at hand, a distinct path-dependency continues to play out and accounts for markedly different outcomes in key respects. Most fundamentally, the Nordic countries retain generally high trust in public institutions, which spills over onto the public media networks and established newspapers.

4.2 Fake News and the Media

A common technique of distorting reality is the usage of propaganda methods (Soules 2015), such as media manipulation and the spreading of “Fake News”, i.e., falsified truths or lies. Fake News is not a new phenomenon, given that disinformation, lies and deceit have been invented and propagate as long as humans have walked the planet (Harari, 2011). The term itself is “new”, however, as it was coined by Hillary Clinton in a speech 2016, when she referred to “the epidemic of malicious fake news and false propaganda... flooding social media”. The concept spread rapidly, picked up by, among others, Donald Trump on the campaign trail when he used it against CNN a month later (Wendling, 2018). As a president he gave out “Fake News Awards” to reporters who had come up with particularly dire falsifications.

The association of fake news with social media platforms such as “Twitter” or “Facebook” relates to the enormous potential for their rapid diffusion and the multifarious purposes for which they are deployed. Not just populists and extremists but also regular politicians speedily picked up on the phenomenon, including for the pursuit of delegitimizing opposing opinions (Dausend et al., 2017). In the age of internet and social media, with chat bots and AI integrating data sources and communication channels for mass communication coupled with personal targeting, what we associate with fake news has become so much more difficult to “control”.

In this context, a host of commercial and political interests have worked out the means and tools for manipulation of “news” on an industrial scale. Faced with such developments, established news media are struggling how to respond. A new playing field is taking shape, where proving legitimacy and demonstrating validity of facts meet with formidable challenges at one end, while “anything goes” on the other (UNESCO, 2020).

As we have seen, from early on the Nordic countries were in the forefront of building institutional capacity to move ahead with ICT, in a sense navigating a rapidly evolving technological and market landscape with few borders which inevitably was hard to regulate. As fake news exploded, in some respects the Nordic countries have been prone for targeting, not least as the corporatist model makes it hard to act with speed and decisiveness on issues that affect many actors and interests. Also, open borders and cultural aspects, e.g., a sense of naiveté, have been exploited. In other respects, these countries have built capacity, and a kind of preparedness, to cope. The following conditions are viewed as helping the Nordics to counter the challenges of fake news and underpin the ability of trust in societal institutions and the media:

- Limited size marked by the presence of communication channels that have large reach, relating to relatively homogenous societies which, at the same time, have an inclination to openness, social cohesion and welcoming of development, as witnessed by their consistently high ranking at or near the top of almost every index – Press freedom, press freedom, transparency, gender equality, innovation and education – hampering the ability of destructive forces to sow suspicion and conflict;
- Strong traditions of reading coupled with public services related to education, libraries, etc.

Having said that, the challenges at hand for the Nordics, associated with fake news, are serious and complex. Its presence and impacts have been documented in new kinds of attacks on media itself as well as on political opponents (Kalsnes et al., 2021). Accusing the media of producing fake news as a way out of trouble, meanwhile, may be tempting for an individual politician but contribute to undercutting trust generally. Political actors under fire may naturally – fairly or unfairly - depict themselves as victims of fake news while accusing their political opponents of manipulation.

Examples are at hand as well of politicians warning against the use of the term fake news based on whether someone likes the framing of a story or not, which may lead to reduced trust in editorial media in general. This may further be worsened by various kinds of confusion, such as mixing up the trustworthiness and reliability of media platforms vs. news distributors (Meier 2016).

At times, the distribution of Fake News may serve to exaggerate and create particular impressions, such as having mainstream news channels presented as controlled and manipulated by the government. Once mainstream media lose their legitimacy and validity, they become untrustworthy. The result is a state of insecurity and dissatisfaction with established parties at the municipal, national and European levels, making people more prone to be interested in new “alternative” parties. In the Nordic countries, their respective populist parties have been shown to create confusion this way, as a basis for successful promotion of their own legitimacy and ideas.

Separately, there is a tendency for parties in opposition to make believe that Fake News are spread by government-controlled media platforms, whereas many citizens living in the Nordic countries think that Fake News are distributed by populist parties to exaggerate feelings of concern and distrust towards the government (Wodak, 2015).

Fake news, disinformation, and misinformation are often not diffused broadly or openly, however, but happen “under cover”, targeting particular regions, groups, and individuals. The aim is to break down confidence within specific communities, cause confusion what is real, and sow conflict. Several such campaigns have been verified in the Nordic countries, e.g., in regard to the sentiments towards immigrants and populist parties.

Many citizens overvalue their ability to determine the credibility of digital news (see, e.g., Nygren and Guath, 2019). In the Nordic region, citizens are most concerned with fake news in Sweden (49%), followed by Norway (41%), then Denmark (36%) (Newman et al., 2018). Scandinavian politicians have been both accusers and victims of fake news.

In comparison, European-wide studies have found situations marked by high trust in news to imply that citizens are less likely to perceive fake news as a problem. A negative correlation emerges between the level of perceived trustworthiness of information provided by national media, and the perception of misinformation as a problem within the country. In the countries with low levels of trust in national news, on the other hand, some 75% of citizens view the existence of news that misrepresents reality as a problem.⁶

In the wake of the magnification and diffusion of Fake news happening internationally, a countervailing industry has evolved, checking and publishing data on the number of 'facts violation', overseen by an external institution in support of validity. For many users, the amount of "like-buttons" on social media platforms count as indicators of their truthfulness (Dausend et al., 2017). Despite the presence of various countermeasures, the regulatory response has been largely ineffective, and the situation remains dire (Alemanno, 2018). Wodak (2015) complains about the hopelessness of having a constructive discussion about the validity of facts if every argument that is shared is accused of being false. The effort and challenge of finding the 'real' truth may thus sometimes in itself prove of little meaning.

Legacy media in the Nordic countries have seized the opportunity to assert a role as guardians of quality journalism and source criticism, with many fact-checking initiatives appearing. Paradoxically, however, legacy media at times serve as an amplification and reverberation channel for fake news narratives. This is partly as they cover fake news and movements that challenge the established information order. Swedish public television faced severe criticism in connection with the 2020 US presidential election, as it became viewed as, in effect, whitewashing Donald Trump, attacks on democracy and also domestic populist anti-immigrant parties. The increase in the number of fact-checking organisations in this context have come to cast new critical light on the established media. The efforts to counter fake news, what kind of corrections work best and why, are thus ongoing across the media landscape.

⁶ https://medienorge.uib.no/files/Eksterne_pub/EBU-MIS-Trust_in_Media_2020.pdf

The actual scope and impact of fake news remains unclear, including when it comes to international variation. The activity levels of social networking can of course be compared along with behaviours, such as visiting of particular sites, twitter content, and so forth. More research is required on the scale and scope of the problem of false and manipulated information to address different types of fake news, disinformation, and misinformation in the Nordic countries. We also need to know more about how people differentiate between different types of information online (in line with, e.g., Nielsen and Graves, 2017) and about people's actual abilities to recognise factual news stories compared to opinions that reflect the beliefs, values, or motivations of the author. The potential to produce and disseminate false information through social media has motivated many different actors to engage in the discussion about the role and the impact of fake news and disinformation.

Calls have been framed based on evaluation of the ongoing development in the three Scandinavian countries (Norway, Sweden, and Denmark), for new methods to screen, verify and counter online news, and also to enhance media literacy, partly to counter information manipulation of text, icons, images, and video.

5. Comparing Nordic Media Patterns

Synthesising conclusions from the present report, while also drawing on the previously undertaken review of production aspects, just below we sum up key features characterising prime similarities as well as dissimilarities of the Nordic media models compared with other regions. In this, again, we do not limit to consumption aspects but re-connect with the production part as well, reflecting the intertwined nature of the two. We view the following as particularly worth highlighting:

- Nordic consumption patterns are similar to continental (North-western) European when it comes to ranking of press-freedom;
- In many ways, the Nordic structures of public service broadcasting are similar to those of the UK and Japan;
- The Nordic countries have much in common with similarly wealthy Western societies, but have more in common with each other (Andersen et al., 2007);

- In international comparison, Nordic countries cluster on indicators related to social outcomes—such as happiness, social trust, freedom of speech, leverage of information and communication technologies, and patterns of media use. This stands out as a distinct pattern when the Nordics are compared with other regions;
- Nordic media constitute a distinct entity;
- Newspaper readership is marked by relatively small gender differences in the Nordic countries. Southern Europe has the opposite. While gender gaps range from a 35 percent difference between male and female readership in Portugal, they may not exceed 1 percent in Sweden. Historically rooted explanations include differences in literacy rates, and a greater separation between men and women in social life (Hallin and Mancini, 2004). In this domain, other regions are most likely gravitating to become more similar to the Nordics;
- Radio and TV exhibit relatively high viewer numbers, which radio predominantly public in nature while commercialisation and alternative news are weakly present. Television similarly displays a continuously high following as do the public media part, although private channels advance their standing in this case. Viewer numbers are relatively high for children and, in particular, the elderly in all the Nordic countries, while adolescents and young adults show a marked decline in time devoted to watching television
- External relations demonstrate a clear-cut pattern. With Sweden the most centrally located and largest of the Nordic countries, the surrounding Nordics have strong links to Sweden, although Iceland less so. At the same time, the Nordics are looking west rather than east. While Finland is the most closely related to Sweden, all the Nordics have been influenced by Anglo-Saxon media systems. The French and German influences of the past remain present too, however, and recent years have brought some re-orientation. In other words, current trends point towards reduced focus in external relations on the US and British media, in favour of more attention devoted to continental Europe. Iceland's media system, finally, used to be strongly US-oriented, but, in recent years, a noteworthy diversification has made Iceland more similar to the other Nordic countries, as well as "more European". These developments will be further verified in maps and numbers.

- Broadcasting has declined significantly in all Nordic countries, although to a varying degree. Especially, private broadcasting enterprises, such as radio stations, were affected. In the Nordics, public policy favoured public broadcasting stations, which prolonged user's access to commercial television and radio shows significantly. Nowadays, the Nordics are amongst the front-runners when it comes to fast internet access and digitalisation, while traditional newspapers and public media are still going strong. User demand and global competition influenced the Nordics in setting the political framework to boost nation-wide liberalisation of internet usage, while also having served to sustain a balance in this respect.
- Overall trust in media has weakened but there is a clear correlation between the rise of the internet and decrease of trust in news, especially coming from online broadcasts and social media, such as twitter. Trust in written press remains high in the Nordics and even gained on importance with the rise of fake news. Although the daily watching time of public television has declined, trust levels have stayed relatively high.

As implied above, the influence of the liberal model has, in some respects, weakened. This is noteworthy not least since much attention has been devoted to the question whether the corporatist model of the Nordics has run out of steam, or even evaporated. In fact, Hallin and Mancini (2004) predicted that it would gravitate onwards the liberal model. Ohlsson (2015), among others, argued that such convergence has indeed happened. Others, such as Nord (2008) and Sapiezynska (2018), speak of a hybrid model taking shape, a liberalised version of the corporatist model, with exceptionally strong public broadcasting services along with a weakened (but still existing) distinctive system of state press and media subsidies aimed at supporting diversity.

Table 1 depicts the way the Nordic and Liberal models may be portrayed to broadly relate, with reference to the stylized dimensions of the Hallin & Mancini model. The summary observations, made just above, on the changes that have (or have not) occurred over time, e.g., whether the factor remains relevant, has been weakened, or is gone/altered, are marked in red. Beyond these observations, however, we observe

that any meaningful conclusions on the continued viability of the Nordic model, need to consider the context of the underlying institutional conditions.

Dimensions of Comparison	Nordic Model	Liberal Model
Newspaper Industry (& public service broadcasting)	Circulation declined modestly but remains relatively high. Consumers remain relatively loyal to public media.	Moderate circulation, users having emigrated much more to commercial alternatives
Political Parallelism	From party press and external pluralism to more neutral and commercial press; regulations of broadcast media (gone/altered)	Market-orientation of printed and broadcast media
Professionalism	High degree of institutional self-regulation (partly remains)	High degree; noninstitutional self-regulation
State Intervention	Frequent, press subsidies and regulations (partly remains), other aspect has to do with public defence of public broadcasting	Less frequent, market orientation, less support of public broadcasting
Digital media and trust	Written press and public television remain strongly present (despite a decrease in relative terms). Strong demand for internet use although qualified with low trust in content found on the internet and on social media.	Trust in media is low for written as well as online news, in line with less public regulation of media content. Commercial platforms meet with few hurdles to exploit user information for business purposes.

Table 1: Stylized comparison between Nordic and Liberal media models

Observations made explicit in Table 2 might suggest that the reference to the Nordic model remains valid, but that it has become less distinct. We are leaning in another direction. The world is changing, all models are adapting. The institutions of the Nordic model exerted a strong influence in the past, however, and they continue to do so, influencing how the Nordic model keeps evolving. On top of that, despite the presence of ongoing challenges, in many ways the Nordic model performs strongly.

Coming back to the direction of change in individual countries, the transformation of the Icelandic media and political system, while not extensively covered in this report, may serve as illustration of the particularities at play. In various ways, Iceland's media system has long differed from those in the other Nordic countries. In brief, corporatism

is less present in Iceland, as is journalistic professionalism, and remnants of political parallelism have carried over to what has become a highly commercial media system. This has long operated without the public service requirements or support for private media that characterise the other Nordic countries. Along the way, however, Iceland was particularly impacted by the 2008 financial crisis, and the ensuing years have brought quite systematic change to media and politics. After a temporary cooling of relations, Nordic cooperation involving Iceland has intensified. On regulatory matters as well as structural change, the Icelandic media system now seems staged in a transformation that makes it more similar to the other Nordic countries, not less, and more different from the liberal model (Harrie, 2017).

In order to further evaluate the direction of the Nordic model (overall as well as in regard to the individual countries) relative to others, however, it is necessary to collect more information on international trends, and what is ongoing by way of structural as well as institutional change in other regions. The US, for instance, has experienced massive declines in media circulation, newspaper shutdowns, and layoffs of journalists (Kamarck and Gabriele, 2015). Independent news outlets have been systematically attacked and blamed for society's problems by a long line of politicians, culminating with Donald Trump, while other parts of the system fulfil narrow political and populist agendas. Issues of public trust, fake news along with misuse of personal data and cybercrime, have become extremely serious and interwoven with the operations of the media. Several of these developments form part of a global crisis which affects all regions, although in different ways. The Nordics have set in place functional democratic mechanisms to guarantee checks and balances systems that constantly question, reassure, and replace governing parties and elected representatives. Those systems are being tested through the technological revolution and the subsequent significant change in consumer behaviour. "News" can be produced by anyone with a social media account, with their spread and viral status dependent on the number of followers, retweets, reshares, reposts, and so forth. Yet, the Nordic countries thus far demonstrate the scope for combining the rise of new technologies and media markets with a remaining robust demand for traditional and public media.

To conclude, the Nordic media systems keep evolving under the influence of a specific Nordic Model. The trends and patterns displayed, pertaining to both the production

side (report 1) and the consumer side (report 2), analysed and reviewed in the present work, nevertheless present a case for rethinking the Nordic Model, as envisaged by Hallin and Mancini in 2004, to better reflect the world of 2021.

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Market Report on Southern media



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101004488

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1. The Press Market: Low levels of newspaper circulation

Contrary to popular development of the press in the West, in Southern Europe the press sprung from the intelligentsia and to a larger degree from the world of the *ancien régime*. The newspaper has served primarily as a means of information, communication, and negotiation among the politically active classes rather than as a part of mass popular culture (Hallin & Mancini, 2011; 2004). Even with already low circulation volumes, newspapers in Southern Europe followed a global downward trend in sales and readership, and as a consequence a decrease in titles and advertising expenditure. Therefore, before presenting the press market analysis from 1990 to 2019, we examine the political, social and cultural reasons of the so – called *newspaper crisis* (Siles and Boczkowski, 2012) in the region of Southern Europe.

During the last fifty years publishers made various efforts to adapt newspapers' style and appeal to a wider audience. Along with the big changes in newspaper ownership in the 1980s and even the 1990s, when newspapers went under media conglomerates, more market-oriented newspapers began to emerge. At the same time partisan press was gradually left behind, as in the case of France (Palmer & Sorbets, 1997). Moreover, the anti-concentration laws of the 1980's resulted in high cross – media concentration with major industrial players outside the media sector, like building companies in France and Greece, or even retail in the case of Italy, acquiring various outlets (Iosifidis and Boucas, 2015; Leandros, 2010; Anthaume, 2010). Portuguese media also demonstrate a high level of cross – ownership (Santana – Pereira, 2016) while in 2009 five companies controlled more than two-thirds of the total newspaper circulation in Spain (Santana – Pereira in Zielonka, 2015). As we already examined, these developments resulted in new clientelistic relations of the media sector with the respective governments. However, as Santana – Pereira (2015) points out “low levels of press market development do not always result in threats to media freedom due to a weaker resilience to pressures from political or economic actors. In the case of Portugal, political and economic threats to press freedom are rather low despite the

underdevelopment of its press market”. Moreover, research has shown that the highly concentrated French press continued to be more critical to the government in comparison to the USA press (Kuhn, 2013; Benson, 2010).

As Kuhn points out: “The most obvious gap on the supply side among national dailies and the main reason for their low total circulation is the absence of a popular tabloid: France notably lacks the equivalent of *The Sun* (or indeed the *Daily Mail*) in Britain or *Bild* in Germany. Regional titles, often centered on a provincial conurbation, dominate the daily newspaper market and for commercial reasons these newspapers tend to eschew overt political partisanship” (Kuhn, 2013).

Regarding the available titles Santana – Pereira (in Zielonka, 2015) points out for the Iberian countries that “according to the World Association of Newspapers, in 2009 there were 155 daily newspapers in Spain, while in Portugal it was possible to find twenty-five different daily titles in the newsstands. The Spanish market was therefore amongst the EU markets with higher press diversity (right after Germany); by contrast, Portugal was one of the twelve EU member states with the lowest number of daily newspapers”.

For Santana - Pereira (2016) it is the underdeveloped press market of Portugal that poses obstacles to new titles. But in most Southern European countries, low circulation and the continuous failures of newspapers to reinvent themselves in appealing ways led to over - dependence on state aid along with the governmental involvement with the publishers (Antheaume, 2010). Italy and France had developed such complicated media subsidy mechanisms since the 60’s (Antheaume, 2010; Palmer & Sorbets, 1997). Needless to say, often the amount of the subsidies has to do with the newspaper's political stance and affiliations. A characteristic example was the lack of transparency in the way the Greek government allocated funds at media outlets during COVID crisis. (The Manifold, 2020).

A strong local press can sometimes operate competitively to national dailies readership. As Mancini & Gerli (2017) point out in Italy “local newspapers have a minor circulation and play a limited role in agenda setting. Nevertheless, some

local papers do reach circulation levels as high as their national brothers. For example, in 2015, *il Resto del Carlino*, *La Nazione* and *Il Mattino* (...)"'. In Italy people that respond they prefer reading regional newspapers are almost as much as those reading the national newspapers, whereas in Portugal regional newspapers readers amount only half of those reading the national newspapers (Nossek at al. 2015). Regarding Spain and Portugal according to Santana - Pereira (in Zielonka, 2015) "the difference between the two Iberian countries is due to the cultural and regional diversity of Spain as opposed to the strongly unified and much smaller Portugal, where the regional media do not have the same strength or *raison d'être*".

Levels of readership increased in the early 2000's due the appearance of free press in Southern Europe. *Direct Matin*, *Metro* and *20 minutes* in France (Kuhn, 2013), *Metro* and *Leggo* in Italy (Mancini & Gerli, 2017), *20 minutos*, *Que!*, *ADN* and *Metro Directo* in Spain (OECD, 2009) soon found their audience. In Italy daily readership has been steadily growing since 2000 and free dailies have strongly contributed to this increase adding about 6 million readers from 2005 to 2009. Research has shown that free newspapers' were the most popular type of print press (Nossek at al. 2015) while focusing mostly on soft news and "apolitical" content (Kuhn, 2013). These newsreaders, however, were not converted into traditional newspaper readers and dropped reading newspapers altogether as soon as free Press was hit by the 2008 economic crisis.

In recent years, access to a wide number of online news sources, the decline of newspaper readership and advertising revenues have considerably affected the newspaper industry in all western countries (OECD, 2009). However, the economic crisis of 2008 and the fall in offline and online advertising spending created additional problems for most newspapers, especially for the countries of Southern Europe. From 2007 to 2012 the advertising expenditure decreased by - 51% in France, -39% in Spain and approximately -60% in Greece for the same period (Papathanassopoulos, 2013). In Italy between 2009 and 2015, the publishing industry lost about 50% of its total advertising revenues (Mancini & Gerli, 2017). As a result, many historical newspapers shut down. In Greece *Eleftherotypia* and

Eleftheros Typos were closed; others continued with only their online editions like *La Tribune* and *France Soir* in France; many free dailies ceased operation like *Metro* in Spain, *Meia Hora* and *Global Notícias* in Portugal; mergers and changes of ownership took place; local offices were shut down and continued working with only a few correspondents, as in the case of Spain. As a result, thousands of newsroom staff and journalists were out of a job.

To better understand the relationship formed between citizens and the press we have to take a look at the *trust in the press* indicator. Contrary to northern and most central European countries, in Southern Europe press is not considered a trustworthy medium. With the exception of Portugal, where 58% of the citizens say they trust the written press, *Southern Europeans appeared to be more skeptical about, if not avoiders of, the press than their northern counterparts*. Press trust in France and Italy scores medium. Cyprus reports low trust (40%), while only one in three citizens in Spain, Greece, Malta, Cyprus and Turkey tend to trust the press (EBU, 2020). Perhaps the most pessimistic element is that with the exception of Turkey, distrust for the press continues to grow among all countries of Southern Europe.

The analysis of secondary data shows some apparent trends, like the downward trend of newspaper sales from 1990 to 2019 (tables 1a and 1b). However, this trend did not appear at the same time across Southern European countries, nor to the same degree. For example, as seen in Table 2, the rate of change for newspaper sales in Italy has been negative throughout the last 30 years but this change was relatively small (from -0.1 to -13%). Sales in Greece were also at a negative rate from 1990 to 2005. However, from 2005 to 2010 there was a sharp increase in newspaper sales (+32%). This trend is similar for France; between 2005 and 2010 there was an increase in sales (+14.4%) probably because of the 2007 elections. However, in both cases these temporary improvements were not sufficient to reverse the negative impact of the previous period. It seems that citizens of countries with former dictatorships took their time to embrace newspapers. Both in Spain and Portugal from 1990 up to 2000 we notice an increase in sales. In Spain from 1990 to 1995 the increase is almost 24% and from

1995 to 2000 about 20%. In Portugal for the same period we notice an increase of 13.5%. However, the downward trend that follows mostly in the case of Portugal overturns the increase of the 90's. Probably, the highest increase in sales is noted in Turkey from 1990 to 1995. Soon Turkish citizens would see many journalists arrested and prosecuted and would lose their trust in print media.

Therefore, in the period under examination we can distinguish two different periods of crisis for the written press. The first is described by scholars as a structural crisis during the '90s, when print was challenged by TV commercial channels (Casero- Ripollés & Izquierdo-Castillo, 2013). The second major challenge publishers had to confront was the financial crisis of 2008 and the decrease both in sales as well as in advertising expenditure. In the meantime, however, the appearance of the free press as well as the online open access websites of paid newspapers gave readers a gateway for not paying for news content, explaining the drops we see in sales volumes in all countries from 2000 to 2005.

Table 1a: Number of annual newspaper sales (in mln)

GEO / TIME	1990	1995	2000	2005	2010	2015	2019
Cyprus	22.4	19	14	-			
France	2 797	-	-	2 410	2 757		
Greece	319.4	261	192	162	213		
Italy	2 325	2 089	2 087	1 903	1 658		
Malta	-	-	-	-	-	-	-
Portugal	-	200	227	198			
Spain	1 080	1 337	1 593	1 520	1 417		
Turkey	1 259	1 785	1 309				

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2011

Table 1b: Change rate of annual newspaper sales (%)

GEO / TIME	1990 – 1995	1995 -2000	2000 - 2005	2005 - 2010	2010 – 2015	2015 -2019
Cyprus	-15.8	-26.3				
France				+14.4		
Greece	-18.3	-26.4	-15.6	+32		
Italy	-10.1	-0.1	-8.8	-12.9		
Malta	-	-	-	-	-	-
Portugal		+13.5	-12.8			
Spain	+23.8	+19.2	-4.58	-6.78		
Turkey	+41.8	-26.7				

Sources: Calculations based on data in table 1

When one examines the dailies average circulation per adult population, we can see these patterns more thoroughly. As already stated, citizens in Portugal and Spain took their time in embracing reading newspapers as a habit. While the two countries had the lowest copies sold per thousand population in 1990, the average circulation went up until 2000 to start dropping again up to 2010. Italy and France followed an upward trend from 1995 to 2000 and then started dropping too. Malta was the only country in the group that saw its dailies average circulation increasing from 2005 to 2010, while it was by far the country with the biggest average circulation in the group in 2010 (295 copies per thousand), followed by Cyprus with 155.3 copies per thousand. Unfortunately, there are not many data for Turkey, but it seems that average circulation increased from 1995 to 2000.

Table 2: Dailies average circulation / Adult population (copies per thousand)

GEO / TIME	1990	1995	2001	2005	2010	2015*	2019
Cyprus	109	91	93.6	155.3	155.3		
France	127	NA	180.7	154.9	146	168.6	
Greece	118	83	81.5	138.9	115.7		
Italy	118	108	127.8	105.9	93.8	92.9	
Malta	NA	NA	NA	280.2	295		
Portugal	39	61	91.2	61.0	59.5		
Spain	77	109	120.1	106.4	99.2	67.1	
Turkey	NA	92	130.8	NA	NA	91.6	

Sources: World Association of newspapers – World Trends Report 1991, 1996, 1998, 2002, 2010

(*) based on the World trends report of 2014

Overall, the biggest effect is a change of reading habits. Specifically, when we observe the readership trends as reported in datasurveys throughout the 30 years period, it is apparent that while daily readership drops, weekly readership is rising in most cases until 2015 and then dropping a little from 2015 to 2019 (table 3).

Specifically, in France daily readership fell 8% the last ten years, but weekly readership rose 10% from 2010 to 2019. A similar trend is reported for Spain, where daily readership fell from 26% in 2010 to 19% in 2019, while at the same time weekly readership increased from 18% in 2010 to 30% in 2015 and then decreased marginally from 2015 to 2019 by 2%. Similarly, in Italy daily readership fell by 9% the last decade, but weekly readership rose from 23% in 2010 to 37% in 2019. In Greece daily readership fell from 19% in 2010 to 7 % in 2015 to remain stable the following years. However, Greece nowadays scores the lowest daily readership in Southern European with only 7% of readers. Weekly readership in Greece grew from 2010

to 2015 by 8% to slightly fall again from 2015 to 2019 (5%). Portugal, which is the country with the lowest sales for the Mediterranean group, saw its daily readership increasing from 2010 to 2015 by 3%. However, daily readership decreased again by 6% during the following five years, whereas weekly readership rose 14% from 2010 to 2019.

Table 3: Daily readership / Weekly readership of newspapers (% of population)

GEO / TIME	1990		1995		2000		2005		2010		2015		2019	
	D	W	D	W	D	W	D	W	D	W	D	W	D	W
Cyprus									19	24	14	22	14	20
France									31	16	27	31	23	26
Greece									19	19	7	27	7	22
Italy			36	50					29	23	22	36	20	37
Malta									25	11	23	25	21	18
Portugal			39	46.6					23	20	26	47	20	34
Spain									26	18	22	30	19	28
Turkey														

Sources: Standard Eurobarometer 76 Autumn 2011, Standard Eurobarometer 84 Autumn 2015 Media Use

In Spain, Italy and Portugal one in three citizens continues to read newspapers on a weekly basis. For France and Greece this number is lower, namely one in four in France and one in five in Greece. It can be argued that the penetration of Web 2.0 and faster internet connections, as well as the economic crisis were the principal factors that led to lower newspaper consumption. On the other hand, newspapers in the Southern European countries were merely addressed to the respective elites and not the wider public. Nonetheless, the people that used to read newspapers continue to do so but on a weekly basis. It can therefore be argued that while web – based news portals are more efficient in providing breaking news and 24hour information, newspapers continue to function as a point of reference in decoding

this ocean of constant information.

Indeed, when looking at the number of newspaper titles we see that Weeklies and Sundays' editions grow gradually in number. However, the increase of Sunday titles was more prominent for France and Greece. Greece from 1990 to 2005 had four times more weekly and Sunday titles, while France doubled its Sunday titles from 1990 to 2010 (table 4b), even though as already stated above, weekly readership in these countries was not that high.

It is interesting that in the case of Spain, Italy and most notably in Greece and Turkey, daily titles remain stable or even continue to grow in number even in times when sales plunge (table 4a). For example, in Portugal from 2005 to 2009 there was a decrease in sales of -13% and newspaper titles decreased sharply from 28 to 15. During the same period in Greece, we note a -13% decrease in sales but instead we see the number of newspaper titles increasing from 32 to 39. In Spain for the same period the decrease in readership was -5%. However, 2005 found Spain with three new daily newspapers. In Italy from 1995 to 2000 there was a slight decrease in sales of -0.1%. However, during that period 10 newspapers ceased their operation. Perhaps a strange market response is noted in Turkey, where from 1990 to 1995 with 41% increase in sales the daily titles increased from 14 to 22. During the next five years however, when sales decreased by -26% the number of dailies doubled reaching 45 titles in 5 years.

Table 4a: Number of Daily newspaper titles

GEO / TIME	1990	1995	2000	2005	2010	2015	2019
Cyprus	10	10	8	21	22	NA	
France	97	60	87*	85	NA	84	
Greece	132	24	32	39	40	NA	
Italy	82	78	88	89	90	111	
Malta	NA	NA	NA	4	4	NA	
Portugal	24	27	28*	15	19	18	
Spain	110	126	136	139	134	107	
Turkey	14	22	45	NA	68	74	

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2011, 2015

*Data for 1999

Table 4b: Number of Weeklies / Non – dailies & Sundays' newspaper titles

GEO / TIME	1990		1995		2000		2005		2010		2015		2019	
	W	S	W	S	W	S	W	S	W	S	W	S	W	S
Cyprus	5	9	9	8	10	7	-	-	-	-	-	-	-	-
France	287	22	260	23	245*	32*	-	34	-	44	-	45	-	-
Greece	3	4	8	5	14	20	15	4	13	7	-	-	-	-
Italy	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Malta	-	-	-	-	-	-	6	6	-	6	-	-	-	-
Portugal	-	-	74	242	-	-	18	-	-	-	-	-	-	-
Spain	241	-	-	14	10*	-	-	-	-	-	-	-	-	-
Turkey	-	-	-	-	-	-	-	-	-	1	-	1	-	-

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007,

2010, 2011, 2015, 2019

* Data for 1999

It doesn't come as a surprise that the advertising industry is more responsive than publishers to sales fluctuations. During the first newspaper crisis in France from 1990 to 1995 the advertising expenditure for newspapers was cut up to 75%, whereas in Italy there was a - 15% decrease, in Spain - 10% and in Greece almost -43%.

On the contrary, from 2005 to 2010, most probably due to French presidential elections, the advertising expenditure for newspapers increased 126%. During the same period in Italy, Spain, and Greece there were slight decreases and in Portugal a -9% decrease. Newspapers in Italy were resilient most of the time; however, the advertising expenditure was cut to more than 60% from 2010 to 2019. The drop was huge also in the case of France (-80%), Malta (-72%), Spain (-63%) and Turkey (-73%) for the same period. In Portugal the decrease was -43% while in Greece the drop in advertising share for the same period was -28%. Greece still has the biggest share of advertising expenditure for the press in 2019 reaching 12.4%.

Advertising expenditure for magazines was in most cases higher than for newspapers and did not experience such big fluctuations over the years. However, during the last ten years there have been huge declines in advertising expenditure too. In Cyprus from 2010 to 2019 the expenditure for magazines was cut in half, whereas in Italy, France, Spain, and Turkey it was cut by two thirds. In Greece there was a 74% drop and in Portugal almost 84%. Unfortunately, as we will see the rise of the advertising expenditure for the internet was not as sharp, putting more pressure in publishers who saw revenues evaporating during these ten years.

Table 5: Advertising expenditure in Press (newspapers / magazines) (%)

GEO/TIME	1990		1995		2000		2005		2010		2015		2019	
	N	M	N	M	N	M	N	M	N	M	N	M	N	M
Cyprus	-	-	-	-	-	-	10.9	9.1	7.3	6	5.7	5.2	3.6	3.4
France	56.2	-	14.6	15.4	18	32.5	16.5	22.5	37.3	16.9	11	10.2	7.4	5.8
Greece	18	26.6	10.3	13.2	18.2	26.8	15	36.6	17.2	38	14.6	12.8	12.4	10
Italy	24.6	17.9	21	13.3	22.9	14.6	19	13.3	16.9	11.4	9.7	6.2	6.4	4
Malta	-	-	-	-			34.1	16.7	32.5	15.1	21.7	10.8	8.9	4.7
Portugal	-	-	14	17	10.6	14	7.6	16.2	6.9	14.5	8.3	5.1	3.9	2.4
Spain	37.6	15.4	33.8	13.5	30.2	13	25.2	10.2	20.1	7.9	13.6	5	7.4	2.8
Turkey	47.1	8.7	44.9	-	34.3	6.3	35.8	3.7	21.7	2.1	15	1.4	5.7	0.8

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2011, 2015, 2020

* Data for 1999

In the early 2000s newspapers started experimenting with their online presence. Unlike native digital news media, traditional publishers had to worry about the sustainability of newspapers and finding new viable business models. However, most publishers and users embraced the digital environment faster than advertisers. From 1996 to 2008, as Antheaume (2010) points out for the French press, online open access to newspaper content was the norm. Getting as much traffic and therefore advertising was the goal. The fact that users could and in many cases still can access online the same content that is available in their print edition caused problems in their sustainability, making scholars talk about a cannibalization process (Casero- Ripollés & Izquierdo-Castillo, 2013; Simon & Kadiyali, 2007; Kaiser, 2006; Filistrucchi, 2005; Chyi & Lasorsa, 2002).

There is no consensus on whether the internet is complementary rather than a complete replacement for newspaper readers. Studies have shown that early internet users were also newspaper readers and radio listeners (Stempel, Hargrove, & Bernt, 2000). On the contrary, people who did not use the internet used electronic media instead (Stempel & Hargrove, 1996).

In Greece new native online media have become the most popular sources of news, whereas French, Spanish and Italian online public spheres are still dominated by legacy media (Cornia, 2019; Antheaume, 2010). *La Repubblica*, *Il Corriere della Sera*, and *Il Fatto Quotidiano* websites in Italy, as well as *elmundo.es* and *elpais.es* in Spain and *lefigaro.fr* and *lemonde.fr* in France are among the top-ranking websites. However, advertising revenues appeared to be insufficient for sustaining traditional press outlets (EBU, 2018). New business models combining paywall and subscription models still need time to be established while publishers in Southern Europe have had more difficulties in comparison to the north of Europe to convert free readers to paid online subscriptions.

Even in 2018 (EBU) 90% of publishers' revenue continues to come from print revenues. In order to create value in the highly competitive digital environment, publishers try to develop parallel business models based on personalization of content, as well as other opportunities offered by digital marketing practices (advertorials, dedicated websites and landing pages for advertisers and sponsors, niche audience targeting, remarketing tools, ad alliances). On the other hand, native online media that already use these tools in most cases cannot compete with legacy media in quality news production, mostly due to high cost. On top of these, publishers need to regain their audience trust. That's probably the biggest bet for the years to come for everyone involved in the news industry.

Table 6: Number of daily newspaper websites (online editions)

GEO / TIME	1990	1995	2000	2005	2010	2015	2019
Cyprus	-	-	2	-	-	-	
France	-	-	30	44	57	55	
Greece	-	-	13	-	-	-	
Italy	-	-	88	94	108	103	
Malta	-	-	-	-	-	-	
Portugal	-	-	12	32	16	742	
Spain	-	-	85	59	51	106	
Turkey	-	-	16	-	-	-	

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2011, 2015

* Data for 1999

2. Radio still the most trusted medium

When it comes to radio production there are big differences among EU member states. According to Eurostat (2018) *Spain leads in radio production with 781 stations, followed by Italy with 701 and Greece with 614*. Portugal follows in the 5th place with 298 radio stations. Only in the case of France we found a relatively small number of radio stations, considering the size and the population of the country. On the other hand, France is one of the major employers on radio within the EU. The abundance of media in Southern Europe despite their relatively small markets is best exemplified by Greece: in comparison to Portugal, a country with similar size and population, the Greeks enjoy twice as many radio stations. In table 7 we can see the effect of the economic crisis for this section of the media market, since from 2010 to 2018 Spain saw a 30.5% decline in radio stations, followed by Italy (-25.5%), Greece (-25%) and Cyprus (-22.8%). France had a negative rate of - 6.4%, closer to the European average (-5.1%). Portugal on the contrary was the only country in this group where radio stations increased in number (+9.5%).

Table 7: Number of radio broadcasting enterprises (both public and commercial)

GEO / TIME	1990	1995	2000	2010	2015	2018	Change Rate2018/10 (%)
EU28 (2013-2020)					6,243	5,629	
Cyprus	n.a	n.a	n.a	44	36	34	-22.7
France	n.a	n.a	1141	362	462	339	-6.4
Greece	n.a	n.a	n.a	818	706	614	-24.9
Italy	n.a	2017	1937	940	749	701	-25.5
Malta	n.a	n.a	n.a	10	n.a	n.a	
Portugal	325	337	346	272	271	298	+9.5
Spain	2017	2742	1193*	1,123	953	781	-30.5
Turkey	n.a	n.a	n.a	n.a	n.a	n.a	

Sources: Eurostat (2021). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: <https://appsso.eurostat.ec.europa.eu>, *Data for 1999

Table 8: Number of employees working in the radio industry

GEO / TIME	2010	2015	2018	Change Rate2018/10 (%)
EU28 (2013-2020)	n.a	58,984	56,509	-
Cyprus	340	195	221	-35
France	9,996	8,291	10,018	+0.2
Greece	5,216	2,012	2,781	-46.2
Italy	4,162	2,712	2,546	-38.9
Malta	59	121	n.a	-
Portugal	1,536	1,219	1,242	-19.2
Spain	9,608	6,674	6,876	-28.5
Turkey	n.a	n.a	n.a	-

Sources: Eurostat (2021). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: <https://appsso.eurostat.ec.europa.eu>

Similarly as shown in table 8, the years following the 2008 economic crisis had a detrimental effect for the people employed in this media sector. Namely, in Greece almost half of radio employees lost their job. In Italy almost 40% of the employees were laid off, while in Cyprus the fired employees numbered around 35% and in Spain 28.5%.

These numbers are way higher than the European average (4.2%). Regarding radio employment, France is the outlier since employment increased marginally (0.2%) from 2010 to 2018.

With the exception of Greece, the advertising share for radio has remained rather stable throughout the years, ranging from 4 to 9% of the total advertising expenditure. As shown in table 9, there was a small downward trend noted from 1990 to 2000 for most Southern European countries, but from 2005 and on the advertising spend returned almost on the previous levels.

Therefore, we can say that even though the total advertising spending was affected by the crisis, especially from 2009 to 2014, the radio ad spent was not severely affected. Moreover, we notice that the shifts in listening habits caused by the technological developments (e- radio, streaming platforms, podcast etc.) have not significantly affected the traditional radio regarding the share of advertising expenditure.

Table 9: Radio advertising expenditure (%)

GEO / TIME	1990 ^a	1995 ^a	2000 ^b	2005 ^c	2010 ^c	2015 ^c	2019 ^d
Cyprus	-	-	-	9.67	8.2	7.56	7.83
France	-	-	7.9	8.4	6.8	6.37	5.4
Greece	7.4	6	4.7	4.3	6.8	3.9	4.64
Italy	3.4	-	3.6	5.7	6.9	4.96	5.23
Malta	-	-	-	9.9	7.58	7.12	10.1
Portugal	8	-	-	6.1	5.2	9	7.75
Spain	11.1	10.3	7.4	9.2	9.4	8.92	7.12
Turkey	-	-	-	-	-	-	-

Sources: a. European Media Handbook (1997), b. European Media Handbook (2004), c. European Audiovisual Observatory, e. Data for 2019 retrieved from Statista (2021) 'MAR-AD Advertising expenditures by media (2001-2019)' / Source: Warc / © European Audiovisual Observatory / Yearbook 2020

With the exception of Cyprus and Greece, all the countries in Southern Europe are below the EU28 median regarding the share of respondents who listen to the radio every day or almost every day (Statista, 2020).

As seen in table 10, radio listenership has slightly diminished in the course of 30 years' time, with the biggest drop from 2015 to 2019 (- 11 min. for Spain, - 14 min. for France and - 62 min. for Italy). The biggest drop in radio listenership was noted in Portugal and Spain.

In 2019 the amount of daily radio listening in the Mediterranean countries was on average 133 min. The Mediterranean trend is therefore a bit lower than the European median of 138 min. per day (EBU, 2020). Daily radio listening habits range from 84 min. for Portugal, 97 min. for Spain, 105 min. for Malta, 125 min. for France, 135 min. for Italy, 148 min. for Cyprus to 198 min. for Greece.

Table 10: Radio daily listenership in minutes

GEO / TIME	1995 ^a	2000 ^b	2005 ^b	2010 ^b	2015 ^c	2020 ^c
EU28	179 ⁺	186 ⁺		149	142	138
Cyprus	n.a	n.a	n.a	n.a	n.a	148
France	192 ^a	186 ^b	176 ^b		143	125
Greece	212 ^a	134 ^b	156 ^b		n.a	198
Italy	221 ^a	179 ^b	176 ^b		197	135
Malta					116	105
Portugal	173 ^a	192 ^b	199 ^b		195	84
Spain	218 ^a	95 ^b	172 ^b		108	97*
Turkey	n.a	n.a	n.a	n.a	n.a	n.a

Sources: a: O. Debande & G. Chetrit (2001) *The European Audiovisual Industry: An Overview* – 07/09/01 – Final version data for 1885 and 1999 respectively b: EBU, (2007) *EBU Members' Audience Trends 1994-2006*, Grand-Saconnex: EBU. c: EBU, *Audience Trends*, 2015, 2020(*) & 2021 (+) data for EU 15

Table 11: Public Radio listenership (share %)

GEO / TIME	1990	1995	2000	2005	2010	2015	2020
Cyprus			-	-		-	16.7
France			21.7	20.4		22.7	29.2
Greece			6.5	16.4			6.5
Italy	52.4		20.9	18.2		11.2	11.5
Malta			40	20.6		15.6	16.5
Portugal			7.7	11.7		9.9	7.9
Spain			27.1	8.2		10.8	18.2
Turkey							

Sources: EBU, Audience Trends 2007, 2015, 2020 & 2021

The trend of these last five years can be explained with the rise of streaming services and platforms; and even though terrestrial radio broadcasting is still the most important distribution platform, figures show that online radio is no longer just a complement to FM but replacing it, especially when it comes to younger listeners (Cordeiro, 2012). Concerning news consumption, podcasts seem more appealing to the youth (18 – 34 yrs.), while older age groups (35 – 55 +) still prefer listening to the radio (DNR, 2020). An interesting exception to the rule is Italy, where young people still appear to be avid radio listeners (EBU, 2020).

Although radio is less appealing than it used to be, it continues to be the most trusted medium for 24 countries of EU28, including Cyprus, France, Italy, Malta and Portugal; 59% of European citizens say they trust the radio the most (EBU, 2020; Eurobarometer, 2018). Respondents in Portugal said they trusted radio as well as TV (both 68%). Trust in radio in Spain fell sharply from 2018 with 48% of citizens expressing distrust in 2020. Another notable exception is Greece, where citizens distrust all traditional media (62% distrust radio) and instead turn to the internet to get the news. Distrust in radio in Turkey is as high as in Greece (61%) with Turkish citizens turning to TV and the internet as more reliable sources of information (EBU, 2020).

3. Television still resilient in Southern Europe

3.1 Audiences and consumption

When it comes to television, its consumption, market share and overall impact, research has shown that TV occupies an important part of the daily lives of Southern Europeans (i.e. Hallin & Mancini, 2004). More importantly this trend seemed to be on the rise until 2010, whereupon a reverse trend followed. For 2010 alone, the global average of TV dropped slightly to 190 minutes per day. During the same year, the countries grouped into the Southern European model remained well above the global average. Moreover, in the next ten years TV viewing time continue to grow in all Southern European countries. In 2020 we find Portugal on top of the list for the Southern group with 349 min. of TV viewing, followed by Greece (318 min.), Turkey (293 min.), Italy (292 min.), Cyprus (239 min.), Spain (237 min.), and France (229 min.), (table 12).

According to the Eurobarometer (EC, 2019) the age cohorts most engaged with television viewing are those belonging to 40 – 54 years old (78%) and 55 + category (89%). Of these people, the crushing majority have received equal or less than 15 years of formal education. They mostly self - identify with the working class (84%). Their income doesn't seem to affect their TV viewing habits significantly, since the differences between those reporting difficulties to pay their bills (77%) and those who don't (76%) are almost not existent. What seems to have a significant effect is occupation or lack thereof: among those viewing TV the most are retired people (90%), house persons (83%) and the unemployed (77%). On the contrary, self – employed (71%), managers (68%) and students (51%) report the lowest daily consumption of TV on a TV set. The above statistics can be better explained if we take under consideration demographic parameters, social roles and cultural factors in Southern Europe. Italy, Greece, Portugal, France, and Spain are the countries with the most aged population in the EU.

In each of the above countries almost one in five citizens is above 65 years old (Statista, 2021). In addition, senior citizens are often charged with providing childcare or even intensive childcare when it comes to Southern Europe, while their pensions and other benefits have withered away during the last economic crisis (Glaser et al., 2013). On top of this, senior citizens still haven't developed the necessary skills to facilitate their transition to digital media. Digital literacy among adults (and seniors) is still lower for Southern European member – states compared to the Northern ones (Eurostat, 2020). More precisely, 57% of French and Spanish citizens, 56% of Maltese, 52% of Portuguese, 51% of Greek, 45% of Cypriot and 42% of Italian citizens report they have the basic or above basic digital skills. The Netherlands rank on top with 79% of citizens having at least the basic digital skills, followed by Denmark and Germany (70% each). Therefore, we can talk of a North – South digital divide. At the same time, one in every two young persons (15 – 24 years old) and two thirds of young adults (25 – 39 years old) report that they still watch offline television on a daily basis. As a result, we can assume that television is still a very resistant medium in Southern Europe. However, one question still remains: *Why do Southern Europeans still watch more TV than their northern counterparts?*

There is a major disconnection in Southern Europe when it comes to the hours spent in front of the TV and the trust, they report having in it. Specifically, 22 out of 28 EU member - states report high trust in TV with the highest reported in the Nordic countries (EBU, 2020). *On the flip side, six out of the eight countries of the Southern European model report low to no trust at all in TV:* Cyprus (48%), Turkey and Malta (45%), France (32%), Spain (29%) and lastly Greece (22%). Two notable exceptions are Portugal which reports high trust in TV (69%) and Italy just limping above the European average with 51%. These data lead us to an inevitable conclusion: the viewing habits of Southern European citizens have little to do with TV news content and more with the consumption of entertainment programs. This disassociation can be explained by a deep understanding that news in Southern Europe is not targeted towards the many but the few, or there is an increasing news avoidance or Southern European trust less news that disseminated by mainstream media. Therefore, high viewership paints us a picture of a public trying to make sense of what is happening, a population wrecked by

the economic crisis or a combination of two.

Table 12: TV daily viewing time (in minutes)

GEO / TIME	1990	1995	2000	2005	2010	2015	2020	Change 2020/15
Cyprus	n.a	n.a	153	161	184	204	239	+17.6%
France	184	180	193	206	212	224	229	+2.23%
Greece	n.a	194	191	245	274	269	318	+18.2%
Italy	191	213	207	237	246	254	292	+14.9%
Malta	-	-	-	-	-	-	100	-
Portugal	n.a	192	-	212	210	283	349	+23.3%
Spain	183	209	210	217	234	234	237	+1.28%
Turkey	n.a	200	-	216	230	243	293	+20.6%

Sources: EAO - Trends in European Television 2006, vol. 2, EAO 2011 vol. 2, EAO – Yearbook 2020
EBU, TV Audiences, 2021

3.2 The rise of thematic channels

Since the mid - 1990s television has been developing as a niche medium. New technologies (digital) and new business models (pay TV, PPV) have allowed up to a point TV channels to be sustainable with smaller audiences (Papathanassopoulos, 2002). In effect, the traditional general – entertainment - family television channel is becoming an endangered species. In fact, there is no new channel that has started in the last 30 years, that aims to follow the traditional general entertainment programme diet (Papathanassopoulos, 2002). The new European multichannel environment is constituted by digital platforms with more than 300

channels transmitted mostly through Astra and Eutelsat satellites. Their arrival has opened up the way for increasing specialisation in their content. In fact, digital technology has enabled the analogue thematic channels of the 1990s to proliferate and achieve even more specific levels of segmentation. Nowadays, there are channels specialising on news, music, sports, children, lifestyle, home shopping, animals, wildlife and documentaries, history, science, and so on.

By 2015, the thematic TV market had reached its saturation in most countries of the countries of Southern Europe. As it can be seen in table 13, the number of thematic channels has decreased sharply within the last five years (from 2010 to 2019). The only exception is Turkey, partly because of its late market development. In the case of Greece, the aggressive marketing approach by telecom operators that entered the TV market with their platforms of thematic channels and due to the fact that took advantage since the generalists over the air channels could not screen the popular local productions as a consequence of the severe fiscal crisis and the sharp decline of the TV advertising revenues. Broadly speaking, on the production side, segmentation and fragmentation of the market would sooner or later put financial models to the test, especially in small media markets. On the consumption side, IPTV and VOD are currently establishing in the field, driving revenues in the TV industry.

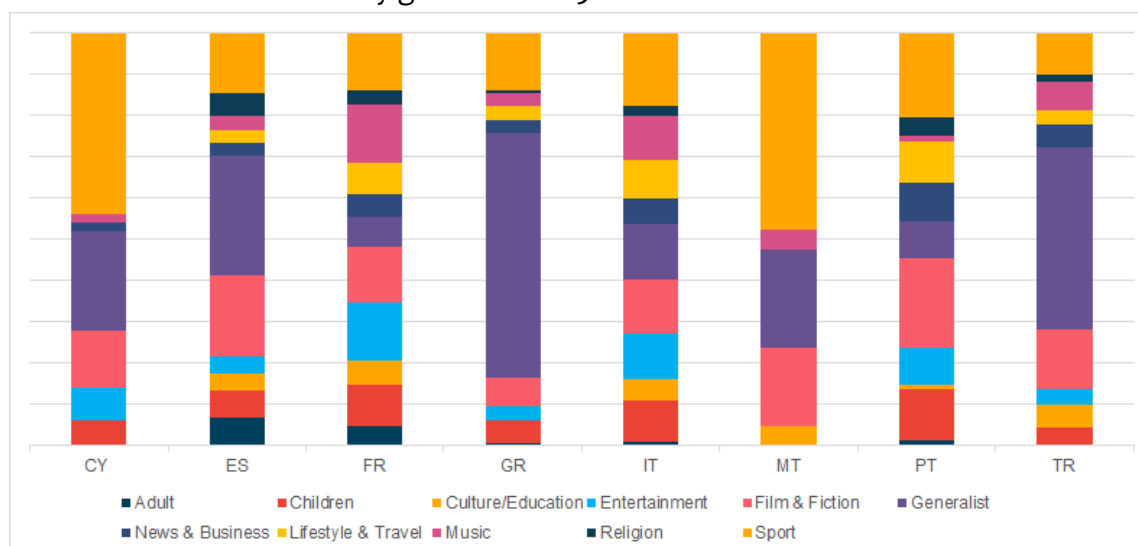
Table 13: Number of thematic TV channels by country

Country / Time	2010	2015	2019
CY	185	199	52
ES	968	882	182
FR	864	1010	271
GR	287	250	173
IT	1157	1104	253
MT	165	173	26
PT	274	664	96
TR	439	328	431

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019

As shown in chart 1, there is no common pattern regarding TV genres, indicating that audiences' preferences may vary significantly from one country to another. For instance, in Cyprus and Malta, 40% of thematic channels are related to sports (in Cyprus 22 channels out of 52 and in Malta 10 out of 26 channels). Despite this, with the exception of Greece and Turkey, the number of Sport channels is decreasing, too. Film and Fiction channels are in most cases almost one in ten of the available channels. Again, Greece and Turkey excluded, Film & Fiction channels have universally decreased during the last five years. News and Business though it seemed as a promising niche in the 2000's are now a small part of the industry. In 2019, Malta did not maintain any news channels out of the 11 - active back in 2015. Similarly, Cyprus had only one, Spain and Greece 5, Portugal 8, Italy 12, and France 13, while Turkey had 22. On the flip side, generalist channels have increased significantly in the case of Spain, Greece, and Turkey, while having a considerable presence in all countries, indicating the challenges that thematic TV is facing in 2020. France, Italy and Portugal still have a wide variety of thematic channels regarding genres. Children, Music, Culture & Education, Lifestyle / Travel and Entertainment channels still have some presence in these countries.

Chart 1: TV channels by genre for 2019



Source: EAO Yearbook 2019

Table 14a: Film & Fiction Channels

Country / Time	2010	2015	2019
CY	13	14	7
ES	35	37	32
FR	57	63	31
GR	7	14	11
IT	52	44	26
MT	9	7	4
PT	31	32	19
TR	21	56	59

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019

Table 14b: News & Business Channels

Country / Time	2010	2015	2019
CY	25	31	1
ES	26	31	5
FR	60	69	13
GR	22	25	5
IT	38	43	12
MT	10	11	0
PT	21	31	8
TR	24	40	22

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019

Table 14c: Generalist Channels

Country / Time	2010	2015	2019
CY	15	14	12
ES	20	15	48
FR	75	75	17
GR	12	11	98
IT	27	41	27
MT	20	21	5
PT	18	25	8
TR	48	64	179

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019

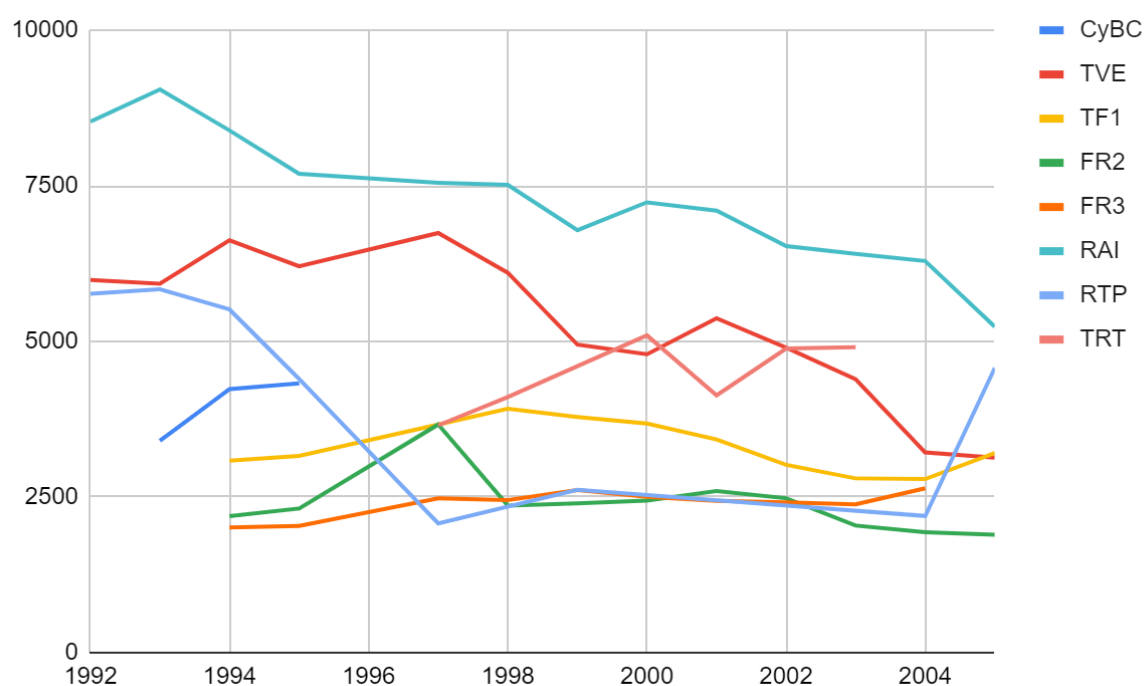
Table 14d: Sport Channels

Country / Time	2010	2015	2019
CY	51	35	22
ES	31	36	24
FR	56	62	32
GR	38	19	23
IT	70	57	35
MT	36	29	10
PT	36	39	18
TR	22	31	40

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019

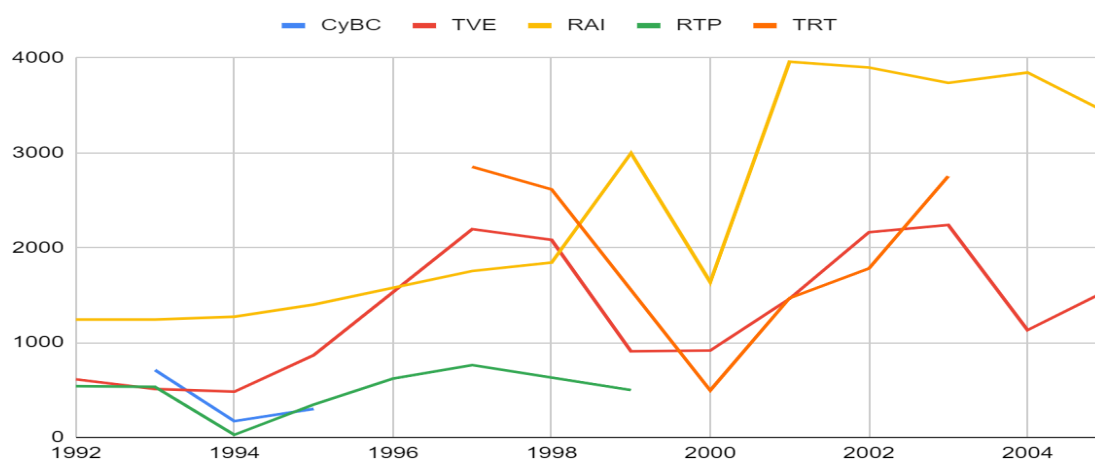
3.3 Public TV Genres

Chart 2: Fiction programs on PTV channels in hours (1992 - 2005)



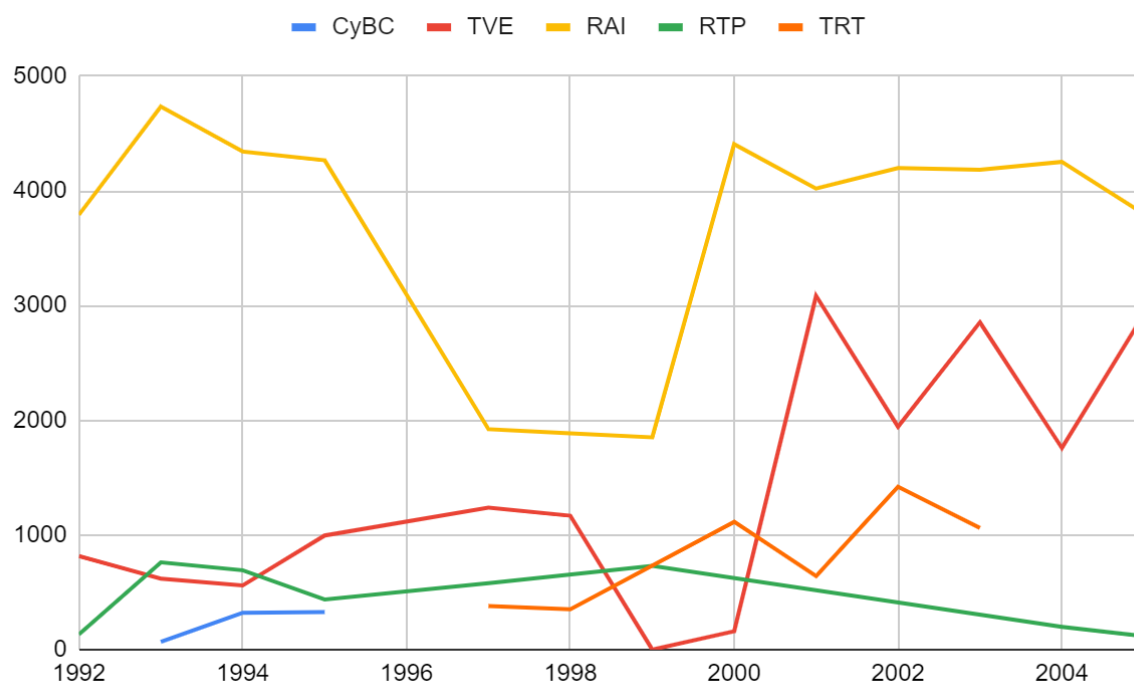
Sources: European Audiovisual Observatory, Yearbooks 2005-1993

Chart 3: Information programs on PTV in hours (1992 - 2005)



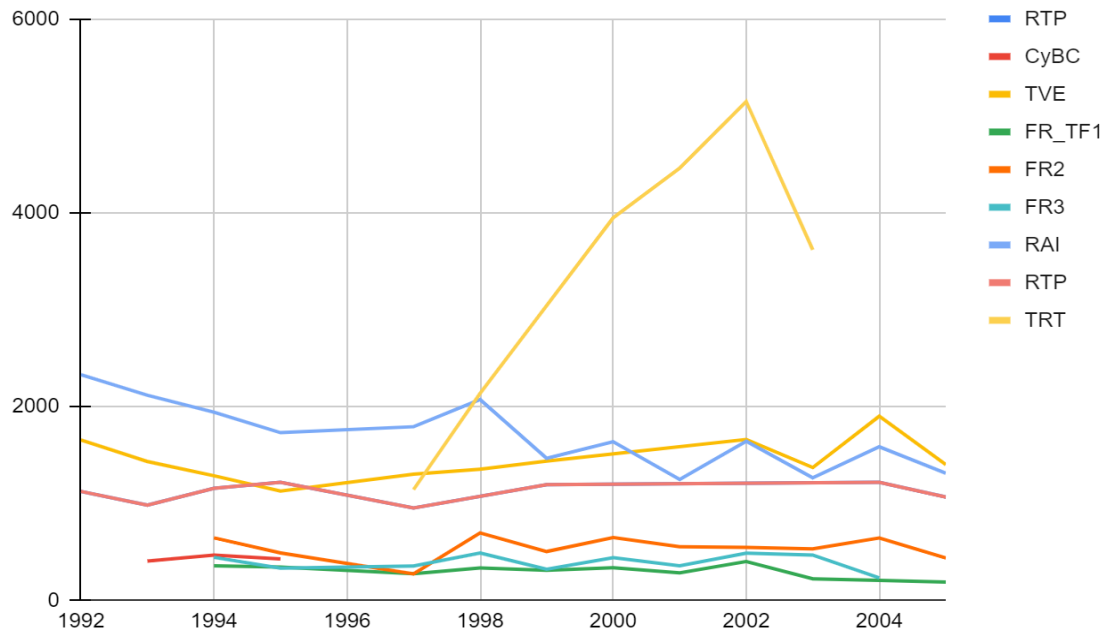
Sources: European Audiovisual Observatory, Yearbook 2005-1993

Chart 4: Art, culture, and science programs on PTV in hours (1992 - 2005)



Sources: European Audiovisual Observatory, Yearbooks 2005-1993

Chart 5: Sport programs on PTV in hours (1992 - 2005)



Sources: European Audiovisual Observatory, Yearbooks 2005-1993

3.4 Public Service broadcasting in the digital age

The picture is less homogenous regarding Public Service Broadcasters. In Italy and France PSB receive more than a third of TV viewership. Smaller markets of Portugal, Greece and Cyprus follow close to 10% or even higher (table 15). Even though a slight downward trend was recorded in PBS popularity for most countries up to 2019, this was reversed during 2020. A notable exception is Spain where in 2010 the PSB had 35.6% in viewership but this dropped to 23.3% in 2020. However, during the Covid – 19 health crisis citizens in most countries turned to public channels for reliable information (EBU, 2020). More specifically public service media (including radio) was the most trusted news source in Portugal and among the top 5 sources in Spain, Italy and France. However, citizens in Greece and Turkey don't trust the public television. As we have already stated in these countries the PSB head is still directly appointed by the government. Politicians in

power continue to treat public television as the “long arm of the state” resulting in low credibility and high levels of citizens’ distrust.

Table 15: Public TV viewership share (%)

GEO / TIME	1995 ^a	2000 ^b	2005 ^b	2010 ^c	2015	2020
Cyprus	-	20.4	20.8	19.7	16.9	12.0
France	40.7 ^c	42.3	39.4	33.2	30.8	31.7
Greece	8.0	10.6	15.4	15.0	7.7	9.7
Italy	49	47.3	43.3	41.3	37.2	35.2
Malta	90 ^c	60 ^c	31.2 ^c	29.5	-	30.1
Portugal	39.1 ^c	29.9	26.8	29.5	18.1	15.8
Spain	37.4	43.9	42.9	35.6*	23.8*	23.3*
Turkey	-	5.9	n.a	n.a	10.0	12.4

Sources: a. Euromedia Handbook, 1997 b. EAO - Trends in European Television 2006, vol. 2, c. EAO 2011,

C: Audience Trends, EBU 2012, EBU, 2021

*including regional channels

The number of public TV channels remains stable through time in most countries of Southern Europe. Few exceptions are that of France, Italy, and Greece where the number of public TV channels more than doubled from 2005 to 2010, due to the operation of digital dedicated TV channels (table 16) since the governments used the public broadcasters as platforms for the advent of digital terrestrial television. Subsequently, several new, mostly thematic, channels started transmitting on the digital terrestrial frequencies.

Table 16: Number of public nationwide terrestrial TV channels

GEO / TIME	1990	1995	2000	2005	2010	2015	2019
Cyprus	2	3	2	2	3	3	3
France	2	7	4	4	10	10	9
Greece	3	3	3	3	8	2	3
Italy	3	3	3	3	14	23	13
Malta	n.a	n.a	1	1	2	2	3
Portugal	2	2	2	2	2	4	5
Spain	2	2	2	2	2	2	2
Turkey	5	5	6	4	6	6	5

Sources: EAO - Trends in European Television 2006, vol. 2, EAO - Trends in European Television 2011, vol. 2, EAO – Yearbook 2015, 2019

Most of *Public Service Broadcasters* rely on a mixed model of revenues from licence fees, advertising and in some cases of direct funding from the state's budget. Public funding of PSB supports the production and distribution of content that would not be appealing to commercial broadcasters, i.e., educational content, pluralistic, informing public opinion etc. However, due to the economic crisis and the following decrease of the advertising market, states had to limit PSB revenue coming from advertising in favor of the commercial channels. For example, in 2009 the law in France prohibited advertising in public channels during prime time, while in 2010 the National Assembly voted an amendment totally abolishing advertising in public TV channels starting from 2016. Similarly, in Spain PSB advertising was prohibited by law in 2010.

Such changes that led PSM relying more and more in licence fees revenues continue to take place up to 2020 (EBU, 2020b). And while in Nordic countries licence fees are almost abolished, *with the notable exceptions of Spain and Cyprus, all countries of the Southern European model rely on licence fees.*

However, the cost of a fee is relatively low (table 17). The most expensive licence

is found in France (139 EUR) and the lowest in Portugal and Greece (36 EUR). The fee is in some cases collected through the electricity and gas bills, as in the case of Italy, Greece, Portugal and Turkey. In the case of Spain instead of a licence fee, there is a special tax on income. Perhaps the most interesting correlation is the one between the cost of the TV licence and the public television share. More specifically as reported by EBU (2020b) and verified in the case of the Southern European model, countries with higher licence fees receive higher shares of public television ratings. Indeed, in France and Italy where the licence fee is higher (still remarkably lower than pay – TV subscriptions), public channels perform better receiving more than 30% in ratings. This finding should not strike one as odd, since better funding should result in better quality of content.

Table 17: TV Licence fee (in EUR)

GEO / TIME	1990 ^a	1995 ^a	2000 ^b	2005 ^b	2010 ^b	2015	2020 ^c
Cyprus	-	-	-	-	-	-	-
France	80	103	114	116.5	121	-	139
Greece	n.a	n.a	n.a	n.a	50	36	36
Italy	82	74	91	99.6	110.5	-	90
Malta	-	-	-	-	-	-	-
Portugal	19	0	0	19.6	21	-	36.2
Spain	0	0	0	n.a	n.a	n.a	n.a
Turkey ⁽⁺⁾	-	-	-	-	-	-	-

(+) Proportional amount based on volume of electricity consumed

Sources: (a). European Commission (2003). Cinema, tv and radio in the EU. Statistics on audiovisual services. Data 1980 – 2002, (b). EAO - Trends in European Television 2006, vol. 2, (c). EAO, 2011 c. EBU, Licence Fee Media Intelligence Service, November 2020

3.5 Number of commercial TV channels

As already noted, the media market of the Southern European model, even though they present common characteristics mostly regarding consumption patterns, they vary greatly in size and dynamic on the supply side. Namely, the model consists of large markets of France, Italy, Spain and Turkey, followed by the poor markets of Portugal and Greece and small markets of Cyprus and Malta that mostly import their content. However, following deregulation all these markets saw a boom in their number of free commercial TV channels up to 2010. However, this trend differs greatly from one country to another (table 18). The biggest increase is noted in Italy with 79 commercial channels in 2010, even though PTV received more than 40% of audience share at the time.

The increase was lower for France (23 channels), Spain (27 channels) and Turkey (23 channels) in 2010. During the same period Cyprus and Malta had strikingly many channels considering their market size (15 and 12 channels respectively). In Greece there were a moderate number of commercial channels that apart from changes in the media field remained stable through time, whereas in Portugal both public and commercial channels remain stable. While the number of commercial TV channels had small fluctuations in France and Spain from 2010 to 2019, the number almost doubled in Turkey. Italy is on top of the list regarding the number of commercial TV channels from 2010 and on. It is striking that in 2019 there were 128 commercial channels in Italy, while in Turkey that ranked in the second place there were only 41 channels at the time. As a result of the economic downturn of 2008, markets in Cyprus, Spain and Turkey experienced the closure of commercial TV channels, while public channels were also closed or merged by 2010. France and Italy saw a boom in the number of commercial channels from 2010 and on, while Portugal kept a stable number in TV channels, as in the case of Greece.

Table 18: Number of nationwide commercial TV channels

GEO /TIME	1995	2000	2005	2010	2015	2019
Cyprus	3	5	3	15	7	12
France	30	3	3	23	29	24
Greece	4	5	8	7	6	7
Italy	9	7	6	79	134	128
Malta	n.a	9	n.a	12	14	6
Portugal	2	2	2	2	2	2
Spain	11	3	4	27	22	22
Turkey	23	50	n.a	23	20	41

Sources: EAO - Trends in European Television 2006, vol. 2, EAO - Trends in European Television 2011, vol. 2, EAO – Yearbook 2015, 2019

3.6 Digital threats / multi-channel & multiplatform environment (Pay TV, IPTV)

During the period from 1995 to 2000 there was an increase in Pay TV operators. However, pay TV penetration can be split into two main groups; countries with high household penetration as in the case of France, Italy, Portugal and Malta with above than 40% of penetration by 2010. Then, there are countries with lower Pay TV household penetration such as Spain, Turkey and Cyprus of around 20% to 25% by 2010. Greece scores the lowest regarding Pay TV with only 11% of households having a subscription by 2010 (EAO, 2011). However, Pay TV subscriptions showed an upward trend from 2015 to 2019, especially in Spain (+23.3%), Turkey (+23%), as well as in Cyprus with +19% and Malta with +15.7% (table 19). The increase was mediocre in France (+5.7%) and Greece (+9.3), while in Italy for the same period there was a sharp decrease (-20.8%) in Pay TV subscribers.

Table 19: Total Pay TV subscribers (in thousands)

GEO / TIME						Change %
	1990	1995	2010	2015	2019	2019/15
Cyprus	n.a	n.a	81	128.6	153.1	+19
France	3,024	5,036	19,613	24,814.5	26,222.8	+ 5.7
Greece	2	n.a	485	976.6	1,066.9	+9.3
Italy	n.a	800	10,246	6,661.1	5,278.0	-20.8
Malta	-	-	144	149.4	172.7	+15.6
Portugal	n.a	n.a	2,670	3,522.8	4,077.2	+15.7
Spain	88	1,287	4,465	5,388.0	6,641.3	+23.3
Turkey	n.a	n.a	4,460	5,621.2	6,910.7	+23

Sources: Ampere Analysis in EAO Yearbook 2020

In Southern Europe broadcasts relied mostly on satellite transmission, therefore in most cases cable remained underdeveloped. On the other hand, countries with extensive cable coverage, like Northern Europe relied less on satellite transmission. However, by 2010 most Southern European households had not access neither to cable nor to satellite TV (Papathanassopoulos & Negrine, 2011). Nonetheless, countries of the Southern European model were dominated by terrestrial reception mode even before digital transition (Papathanassopoulos, 2002). Moreover, cable industry had to face many challenges in order to get established in the Southern European markets and in most cases cable penetration remained remarkably low (table 20).

Perhaps, the most prominent challenge was the fragmentation of infrastructure

controlled by the public sector in each country. The result was a highly concentrated market in most of the countries. Following an acquisition strategy of seven companies by 2010 the cable sector in France was in the hands of Numéricable. In Turkey cable remained in the hands of Türksat national operator, while at the same time in Italy and Greece there were no cable networks whatsoever. As it can be seen in table 20, while the number of cable TV subscriptions remains remarkably low in all countries of the Southern European model, there was an increase from 2015 to 2019. Namely, the highest increase in subscriptions was recorded in France (+44.8%), followed by Spain (+33.8%), Cyprus (+29.2%), Malta (+29%), Turkey (+10.2%) and Portugal (+8.6). As already noted in Italy and Greece there were no cable operators during this period.

Table 20: Cable TV subscriptions (HH in thousand), analogue and digital

GEO / TIME	2005	2010 ^b	2015 ^c	2019 ^c	Change % 2019/15
Cyprus	n.a	n.a	48	62	+29.2
France	3,225	3,421	1,593	2,306	+44.8
Greece	0	0	0	0	0
Italy	0	0	0	0	0
Malta	99	83	79	102	+29
Portugal	1,395	1,484	1,395	1,515	+8.6
Spain	1,578	1,508	1,382	1,849	+33.8
Turkey	1,250	1,230	1,161	1,279	+10.2

Sources: b. IHS, European Audiovisual Observatory, Yearbook 2014, c. Ampere Analysis, IHS, OBS in EAO Yearbook 2020

Pay TV is mostly connected to linear transmission, while non – linear to VoD services. However, Pay AV services penetration (pay TV and VoD) will continue to grow mostly due to IPTV increasing popularity (table 21). According to the EAO

(2020), IPTV was the fastest growing distribution network during 2014 – 2018, mainly at the expense of cable network which saw its market share decreasing by four points during the same period. There are many reasons consumers are turning more and more to non – linear services, such as consumers’ changing behavior of TV viewing in multiple connected, expensive pay TV packages or even lower pay TV penetration level. If we take into account the level of TV viewing for Southern Europe we can expect a considerable increase in VoD and IPTV subscriptions in the foreseeable future. Nonetheless, higher penetration of these services in Northern Europe so far, should remind one that the improvement and expansion of broadband networks is of vast significance for IPTV penetration along with the local market conditions (EAO, 2019). Further growth in IPTV segment will be supported by IPTV service providers offering their services as part of multiplay, for now mostly triple – play, service bundles with flexible subscriptions and packages.

Table 21: OTT / IPTV (HH in thousand)

GEO / TIME	2005	2010	2015	2019	Change% 2019/15
Cyprus	7	62	81	91	+12.3
France	2,986	12,177	17,441	19,060	+ 9.3
Greece	n.a.	55	75	208	+177.3
Italy	162	651	76	208	+173.6
Malta	n.a.	n.a.	19	57	+200
Portugal	n.a.	648	1,518	2,098	+38.2
Spain	207	858	2,896	4,237	+46.3
Turkey	n.a.	n.a.	533	1,497	+180.8

Sources: Ampere Analysis, OBS in EAO 2020 Yearbook.

3.7 Advertising Market

Considering the popularity of TV in Southern Europe, the fact that TV advertising expenditures dominate the total advertising spending shouldn't come as a surprise. Again however, we can distinct among two different groups; one consisting of the large market where TV advertising share actually decreases from 2005 to today, even though change rate has been in most cases small (table 22). The other, from small markets where advertisers, regardless of the rise in new technologies and personalized services provided, continue to invest heavily in TV advertising, even more than 15 years ago. Therefore, the TV advertising share in Cyprus was 73% in 2019, in Portugal 72.8% and in Greece 55.5% of the total advertising expenditures. According to EAO (2020) television advertising remains resilient in countries with lower advertising expenditures per capita.

In effect, the small decrease in TV viewing time that has been taking place the last years, along with the use of new technologies and the change in consumers' habits haven't been significant enough in Southern Europe for advertisers to drastically change their budget allocation, especially regarding TV. However, new opportunities such as data analytics, interactivity, targeting niche audiences, personalized and measurable advertising make the transition of investment to digital advertising only a matter of time.

Table 22: TV advertising expenditure (%)

GEO / TIME	1990 ^a	1995 ^b	2000 ^c	2005 ^c	2010 ^c	2015 ^c	2019 ^c
Cyprus	-	-	-	59	69	70	73
France	-	-	30.1	34.2	31.3	28.7	25.7
Greece	44.5	63	44.1	31.4	32.9	53.1	55.5
Italy	47.7	-	58.2	55.9	52.4	48	42.8
Malta	-	-	-	30	28.4	39.3	44.3
Portugal	44	-	51.1	60.2	65.2	63.4	72.8
Spain	30.1	39.5	41.6	44.7	42.6	39.4	29.2
Turkey	-	-	-	50.7	51.3	49.2	46.1

Sources: a. WAN 1991, b. WAN 1996, c. Warc © European Audiovisual Observatory Yearbook, 2020

4 Steady increase of digital connectivity, with different growth pace

Broadband internet penetration has followed a considerable growth in the last decade, with Spain presenting the highest development, according to the latest data from Eurostat (2020). More precisely, in 2020, 97% of Spanish households have broadband internet connection (well above the EU average). Cyprus seems to have an outstanding performance in this indicator as well, with 92 % and 93% of the island's households having broadband internet access, in 2019 and 2020, respectively, followed by Malta (89%). It comes as a surprise that countries with advanced economy as Italy and France seems to follow broadband internet penetration with a slower pace than countries with weaker economy (table 23). More precisely, in Italy 87% of households have broadband internet access in 2019, whereas in France 88%. Greece has the lowest broadband internet penetration rate, as 85% of the country's households have access to broadband internet connection in 2019 and 2020, as well. Portugal stands near the bottom of this ranking, marginally better than Greece (87%). In Turkey, the broadband internet penetration has been growing steadily, where according to Turkstat (2015, 2019) in 2015, 67.8% of households had broadband internet connection and in 2019 the relevant percentage has risen up to 87.9%.

Table 23: Percentage of households with broadband internet (%)

GEO/TIME	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
EU 27 (from 2020)	70	74	79	81	82	85	87	88	90	92
EU 28 (2013-2020)	72	76	80	82	83	86	88	89	91	n.a
Greece	55	n.a	n.a	70	75	76	79	84	85	85
Spain	66	69	73	77	82	84	85	89	93	97
France	75	81	81	80	79	82	84	85	88	n.a
Italy	55	57	71	73	77	79	83	85	87	88
Cyprus	60	n.a	69	71	75	76	84	89	92	93
Malta	76	74	79	76	79	82	84	84	85	89
Portugal	65	69	69	71	75	80	83	84	84	87
Turkey	n.a	n.a	n.a	n.a	n.a	n.a	n.a	n.a	n.a	n.a

Source: Eurostat

A more detailed analysis of the broadband internet penetration, according to fixed broadband and mobile broadband subscriptions per 100 inhabitants, clearly manifests that the mobile broadband internet has taken the lead in the national markets under examination.

According to the most recent data (2019), France and Malta hold the “lions’ share” in **fixed broadband subscriptions** (45.69 per 100 inhabitants and 45.99 subscriptions per 100 inhabitants, respectively), with France having the best performance in this indicator diachronically. Greece, Cyprus, Italy and Spain seem to have followed parallel trajectories regarding their performance in this indicator, with Italy having the lower percentage of fixed broadband subscriptions. Turkey lies in the bottom of this indicator ranking, falling behind to a significant degree, compared to the other countries under examination. It seems that in until the 2010, in Turkey, there had been a more intense growth, at a bigger pace, while in the following years there has been a slow growth (table 24).

Table 24: Fixed broadband subscriptions per 100 inhabitants

Country	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Cyprus		0.35	0.82	1.39	2.33	4.28	8.32	12.57	18.48	21.49	23.15	24.61	25.47	26.71	28.76	30.72	32.58	34.21	36.27	37.79
France	0.33	1.01	2.77	5.92	10.81	15.50	20.67	25.46	28.66	31.74	33.93	35.98	37.73	39.03	40.45	41.68	42.80	43.92	44.78	45.69
Greece				0.09	0.46	1.43	4.36	9.15	13.65	17.49	20.69	22.76	24.95	27.12	29.49	32.26	34.06	35.75	37.65	39.62
Italy	0.20	0.69	1.49	3.91	8.15	11.71	14.51	17.23	19.14	20.45	22.08	22.69	22.99	23.29	23.81	24.60	25.66	27.34	28.14	28.85
Malta	0.42	2.31	4.43	5.67	9.34	12.70	13.03	20.59	23.98	27.62	30.39	30.81	32.18	33.56	35.23	37.64	39.27	41.40	43.67	45.99
Portugal	0.24	0.96	2.51	4.81	8.01	11.09	13.50	14.44	15.44	18.03	20.07	21.22	22.71	24.48	27.43	30.31	32.69	34.74	36.90	38.80
Spain	0.19	1.13	2.98	4.98	7.85	11.44	15.07	17.73	19.83	21.04	22.70	23.72	24.49	26.11	27.80	29.02	30.26	31.44	32.50	33.41
Turkey		0.02	0.03	0.30	0.86	2.34	4.03	6.83	8.18	9.04	9.81	10.34	10.54	11.71	11.48	12.10	13.15	14.70	16.28	17.06

Source: ITU

Mobile broadband subscriptions have encountered a tremendous growth during the last decade (2009 - 2019) in the majority of the countries under examination, although at a different pace. Cyprus has the best performance in this indicator, compared to the other countries of this study. However, it seems that a tremendous growth has taken place after 2014, compared to its counterparts, where a firmer growth has taken place during the years under cover (Spain or Italy, for example). More precisely, in 2019, Cyprus has 118.0 mobile broadband subscriptions per 100 inhabitants in 2019 (compared to 38.72 in 2010), followed by Spain (102.94 mobile broadband subscriptions per 100 inhabitants in 2019) and France (96.99 mobile broadband subscriptions per 100 inhabitants). Italy also presents a steady growth in this indicator with 92.2 mobile broadband subscriptions per 100 inhabitants in 2019 (compared to 38.54 / 100 inhabitants in 2010).

Malta and Greece stand near the bottom on the ranking of this indicator, with 87.23 and 87.1 mobile broadband subscriptions per 100 inhabitants in 2019, respectively, followed by Portugal (79.06 mobile broadband subscriptions per 100 inhabitants). Turkey has the weakest performance in this indicator with 74.8 mobile broadband subscriptions per 100 inhabitants, although it seems to have covered a great distance compared to the 3.45 connections per 100 inhabitants in 2009 (table 25). One interesting notice is, that in countries like Greece, Cyprus, Portugal, which have been affected disproportionally from the economic crisis, the growth of mobile broadband subscriptions had followed a more moderate growth during the years (2010 - 2014). However, the aforementioned countries have almost doubled their performance in this indicator during the period 2015 - 2019, whereas in other countries there has been a more steady growth during the entire time span under examination.

Table 25: Mobile broadband subscriptions per 100 inhabitants

Country	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Cyprus				38.72	39.86	44.03	42.73	57.34	75.25	96.13	104.67	111.20	118.70
France	9.52	18.39	28.30	36.43	43.89	51.60	57.20	66.77	75.27	81.75	86.75	91.37	96.99
Greece			12.54	25.59	31.34	35.48	37.37	42.61	47.64	56.03	66.94	81.38	87.10
Italy		13.73	17.39	38.54	45.27	50.75	62.26	71.35	82.90	83.45	86.05	89.89	92.20
Malta		11.20	17.07	19.86	32.65	34.81	57.20	56.61	62.30	74.78	84.41	84.84	87.23
Portugal			20.46	24.22	27.67	33.00	37.22	45.65	53.25	62.73	69.15	73.84	79.06
Spain			9.87	23.43	36.73	52.62	66.84	77.81	83.63	89.00	93.52	98.48	102.94
Turkey			3.45	9.98	20.03	26.42	31.84	41.90	49.75	64.81	70.20	74.20	74.80

Source: ITU

It is worth noting though that according to the recent Digital Economy and Society Index Report (2019) the overall performance of the countries under examination is a little bit different, than the ranking comprised only by the indicator of mobile broadband connections. According to DESI index, which is the outcome of five distinct dimensions (connectivity, human capital, use of internet, integration of digital technology and digital public services) Malta has the best performance, followed by Spain and France, whereas Greece and Italy have the lowest scores on the index.

4.2 Southern Europeans migrate on-line

Internet use has been steadily growing throughout the last decades in all the countries under examination. What is worth noting though, is that smaller Southern countries - with the exemption of Spain - seem to be the leaders of this trend. More precisely, in 2019, 90.72% of Spanish people use the internet, followed by 86% of Cypriots and 85.78% of Maltese people (table 26). In general, internet users in Spain embrace the possibilities offered by the internet. More precisely, they value the internet as a source of information and entertainment, as a way to find up-to-date content, and as a means for acquiring and developing new skills (Dunahee & Lebo, 2015). However, it is worth mentioning that as far as it concerns

the role of the internet as a space of sociability, the majority of users appeared reserved, not wishing to share their emotional states online (Dunahee & Lebo, 2015), a trend- that as we will see in the following section-it is also manifested in the number of people participating in the social media.

For Greek-Cypriots the internet is primary seen as a way of finding information about goods or services, exchanging e-mails, reading newspapers and magazines, and posting in social networking sites, while the percentage of users looking for news online at least daily almost doubled in 2012 (65%) compared to 2010 (34%) (Lebo, 2013). This increase in daily internet use in the country can be explained by the proliferation of online sources for news in Cyprus during the last few years, but this trend could also be interpreted in the light of the financial crisis, since in times of uncertainty there is a rise in news consumption, due to an increased need for orientation (Lebo, 2013). However, this consumption trend is still of valid today, since the majority of Cyprus' Greek-Cypriot community (69%) go online to look for news daily or several times a day (Lebo,2018).

Table 26

Percentage of individuals accessing the internet

Country	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Cyprus	15.26	18.82	28.32	30.09	33.83	32.81	35.83	40.77	42.31	49,81	52.99	56.86	60.69	65.45	69.33	71.72	75.90	80.74	84.43	86.06
France	14.31	26.33	30.18	36.14	39.15	42.87	46.87	66.09	70.68	71,58	77.28	77.82	81.44	81.92	83.75	78.01	79.27	80.50	82.04	83.34
Greece	9.14	10.94	14.67	17.80	21.42	24.00	32.25	35.88	38.20	42,40	44.40	51.65	55.07	59.87	63.21	66.83	69.09	69.89	72.24	75.67
Italy	23.11	27.22	28.04	29.04	33.24	35.00	37.99	40.79	44.53	48,83	53.68	54.39	55.83	58.46	55.64	58.14	61.32	63.08	74.39	n.a
Malta	13.11	17.88	28.92	31.64	34.62	41.24	40.41	46.90	50.08	58,86	63.00	68.02	68.20	68.91	73.17	75.96	78.08	81.01	81.66	85.78
Portugal	16.43	18.09	19.37	29.67	31.78	34.99	38.01	42.09	44.13	48,27	53.30	55.25	60.34	62.10	64.59	68.63	70.42	73.79	74.66	75.35
Spain	13.62	18.15	20.39	39.93	44.01	47.88	50.37	55.11	59.60	62,40	65.80	67.09	69.81	71.64	76.19	78.69	80.56	84.60	86.11	90.72
Turkey	3.76	5.19	11.38	12.33	14.58	15.46	18.24	28.63	34.37	36,40	39.82	43.07	45.13	46.25	51.04	53.74	58.35	64.68	71.04	73.98

Source: ITU

According to the recent Digital Economy and Society Index (2019), Malta belongs to the European cluster with the most active internet users. In Malta, there is a growing percentage of internet users that go online for reading newspapers and magazines (from 49% in 2013 to 70% in 2019), while internet use for watching stream TV or videos has slightly decreased (from 64% in 2016 to 62% in 2018) (tables 27 and 28).

In France, the percentage of individuals using the internet has been doubled from 2005 to 2018 (from 42.87 % to 82.04 %). However, there was a twist in the country's population habits regarding the consumption of the internet. For seven years (2007 - 2014) France has the best performance in this indicator, with an ever growing percentage of individuals using the internet. However, in 2015 the percentage of individuals using the internet fell to 78.01% compared to 83.75% the previous year. In the years to come, there has been a slow growth, while in 2019 the country has the same percentage of individuals using the internet as in 2014 (83.34% and 83.75%, respectively). The percentage of French people that go online in order to read news sites, newspapers and magazines has risen from 41% in 2013 to 54% in 2019 (table 27). According to the latest data from WIP (2018), the majority of internet users (60%) go online to look for news daily or several times a day. In the meantime, according to Eurostat figures, the percentage of internet users that migrate online for watching streamed TV or videos has risen during the last years from 53% in 2016 to 55% in 2018 (table 28).

Table 27: Percentage of individuals using the internet for reading online news sites, newspapers, and magazines

GEO/TIME	2011	2012	2013	2014	2015	2016	2017	2018	2019
EU 27 (from 2020)	:	:	47	51	53	56	60	:	62
EU 28 countries (2013-2020)	:	:	48	52	54	57	61	:	63
Greece	:	:	46	54	57	59	61	:	66
Spain	:	:	50	59	62	63	66	:	71
France	:	:	41	39	42	48	53	:	54
Italy	:	:	40	37	37	41	39	:	44
Cyprus	:	:	48	50	57	56	65	:	70
Malta	:	:	49	55	62	62	67	:	70
Portugal	:	:	45	48	53	55	59	:	62
Turkey	:	:	33	36	36	41	44	:	52

Source: Eurostat

Italians, Greeks, and Portuguese people use to a lesser extent the internet, compared to their Mediterranean counterparts. The percentage of individuals using the internet in Italy was 74.39 in 2018, whereas for the year 2019, 75.67% of Greeks accessed the internet and 75.35% of Portuguese people.

Regarding Italy, since the country stands well in connectivity indicators (which means that infrastructural shortcomings are not an obstacle for the diffusion of internet technology in the society), a possible explanation for the comparative low percentages of internet users can be traced in demographic, economic and cultural factors. Italians visit the internet at a greater extent for watching streamed TV or videos (54% in 2018) than reading the news on line (39% in 2017 and 44% in 2019) (tables 27 & 28).

In Portugal, during 2010 there was a large percentage of non-users (45.4%) who said they are not interested in the internet or do not find it useful (Lebo, 2012). Today even though the percentage of internet users has risen up, still the country's population has moderate internet consumption, compared to other countries. In the same vein, Greece falls behind the other countries under examination, as far as it concerns this indicator.

The majority of Greeks use the internet for communication purposes, such as e-mail exchange and instant messaging (75.7% of users report they exchange messages on a daily basis), while 63.5% of internet users turning to the internet for news consumption on a daily basis, in order to read local, national or international news (Tsekeris et al., 2020).

As far as it concerns Turkey, it seems that it has managed to follow the internet consumption trends of the European countries under examination. Even though, in the beginning there seemed to be a digital gap, compared to the percentage of internet users in other European countries, in 2010 only the 39.82 % of the Turkish people used the internet (a percentage that is lacking behind the average of the EU countries of this cluster). In 2019 the same percentage has risen up to 73.98%. Turkey, now, seems to have found its position in the “EU team” with the lowest percentage of internet use.

Regarding the internet activities that the majority of Turkish people performed, according to recent data (in the first quarter of 2015), 80.9% of Internet users participated in social networks. This proportion was followed by reading online news, newspapers, news magazines (70.2%), seeking health-related information (66.3%), uploading self-created content to any website to be shared (62.1%) and finding information about goods and services (59.4%) (Turkstat, 2015). In 2019, 51.2% of internet users among the individuals aged 16 - 74 interacted with public authorities over the internet for private purposes and there was also a noticeable increase in the use for internet for the purchase of goods or services (34.1%) (Turkstat, 2019).

Table 28: Percentage of individuals using the internet for watching internet streamed TV or videos

GEO/TIME	2016	2018
EU 27 (from 2020)	54	59
EU 28 (2013-2020)	56	61
Greece	44	45
Spain	63	70
France	53	55
Italy	50	54
Cyprus	62	70
Malta	64	62
Portugal	54	47
Turkey	45	57

Source: Eurostat

4.3 Social media are here to stay

Social media among the Europeans in the countries under examination is steadily growing, although not with the same pace in all the countries. As we have seen in the previous section Spain has the biggest percentage of individual accessing the internet, but stands in the middle as far as it concerns the percentage of people that state a daily (50%) or weekly (13%) use of social media, according to the latest data (table 29). However, in 2015 there was a significant increase in the daily use of social media (+18) compared to 2010, which is attributed to the political upheavals in the country, which had triggered the public's interest and the following exchanging of views via the social media (Newman et al., 2015).

On the other hand, Malta seems to be the leader on social media use, with 68% of its population stating in 2019 a daily use of social media, followed by Cyprus (63%), which

as we have already seen has the biggest percentage of daily internet users. Cyprus is also known as a “social media island.” According to a study carried out by researcher and social psychologist Paul McEvoy, in 2017 the island had the highest percentage of Facebook users in Europe (94%), a trend that according to the author is highly associated with the social consequences of living in a closed society (Lebo, 2018).

France and Italy have the lowest percentage of daily social media use, since in 2019 only 47% of French people and 39% of Italians stated that they use social media on a daily basis. Regarding the low percentage of social media use in France, one possible explanation could be found in the French government’s determination for stronger social media regulation over privacy matters, which has resulted in clashes with Silicon Valley CEOs and consequently, has affected the social media usage in the country compared to other European countries (Lebo, 2018). Despite of concerns related to the issue of privacy, social media are still prevalent among those aged 25 or younger, as 88% of them are regular users, whereas only 38% of those over 55 use social media (Lebo, 2018). In addition, according to Reuters Digital News Report (Newman et al., 2019) the Yellow Vests protests have boosted the use of social media for news (42%) in the country.

Table 29 Percentage of Daily /Weekly Social media users

GEO/Time	2010	2015 *	2019*
Greece	13/9	36/12	53/10
Cyprus	15/8	40/9	63/8
Italy	15/9	31/18	39/21
Spain	20/9	38/11	50/13
Portugal	12/7	35/17	60/9
France	16/8	36/10	47/9
Malta	28/8	50/11	68/6
Turkey			

Source: Eurobarometer 76, 84, 92

It is worth noting, that the same picture has been depicted by the historical data provided by Eurostat (time period 2011-2019), regarding the percentage of Europeans that stated that they had been participating in the social networks in the last 3 months prior to the survey (table 30). The percentage of people aged 16-74 that participated in social networks in 2019, in the last 3 months prior to the survey, was 72% in Cyprus, followed by Malta (71%). Still, Italy and France have the lowest performance in this indicator, with 42% of Italians and 42% of French people to have participated in social media in the last three months upon the year of quest (2019).

Table 30: Percentage of individuals participating in social networks 3 months prior the year of survey

GEO/TIME	2011	2013	2014	2015	2016	2017	2018	2019
EU 27 (from 2020)	36	41	44	48	49	52	54	54
EU 28 (2013-2020)	38	43	46	50	52	54	56	57
Greece	28	36	41	44	47	50	53	57
Spain	35	46	51	51	54	57	58	59
France	36	38	39	38	40	43	42	42
Italy	26	32	36	38	42	43	46	42
Cyprus	33	44	50	54	60	63	69	72
Malta	45	51	53	60	64	70	70	71
Portugal	32	44	47	48	52	56	59	60
Turkey	:	32	38	41	48	54	60	60

Source: Eurostat

The development of social media has been rapid in Turkey. While the country is lagging in terms of connectivity compared to more advanced economies, Turkey's youthful population structure makes it a very promising market for most social media applications and services (Telli, 2011). According to Turkstat (2015), in the first quarter of 2015, 80.9% of Internet users participated in social networks¹.

¹ According to Eurostat, for the same year the percentage of individuals that participated in social media in Turkey was 41.

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This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101004488

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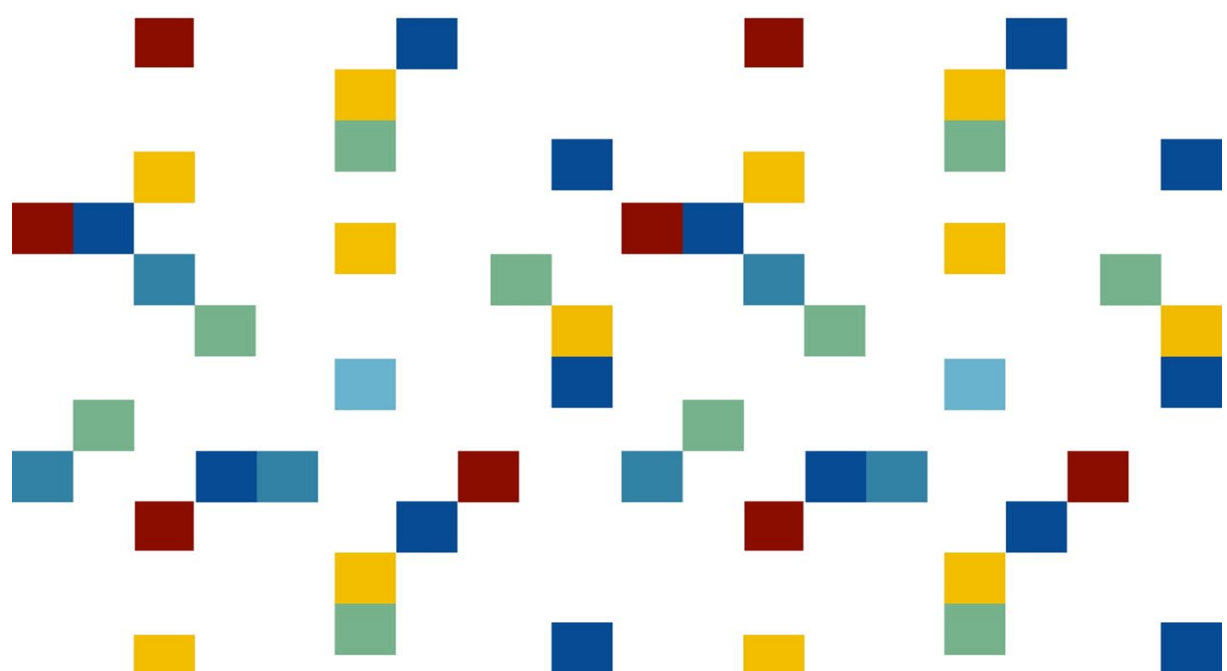


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It is a well-known truth that media are integral part of democracy. We somehow take for granted the fact that media exist to maintain the bridge between the government and the people. We know that the press is also called the fourth pillar of democracy. So, it is logical to conclude that the state of media market is connected to the state of democracy in each country. Press freedom in many Eastern European countries has increasingly come under threat in recent years.

The processes of transition from socialism to democracy include deep changes in media market and policy and a process of democratization and accession to the European Union – for which one of the prerequisites is a free press.

The process of transition of those countries goes through two flows known as “Eastern enlargement”. In 2004 the Fifth Enlargement of the EU took place and Estonia, Latvia, Lithuania, Poland, Czech Republic, Slovakia, Slovenia and Hungary became part of EU. In 2007 with the Sixth Enlargement Bulgaria and Romania became part of the Union. And with the Seventh Enlargement Croatia joined the Union.

Those dates are important as political changes affected dramatically the media market, especially in the post-socialist countries. One of the main facts, which we can highlight from the beginning is the lack of data about details in the media market in the region. And although with years the media should have become more democratic and freer, in the last years some disturbing signs from Eastern Europe became obvious. The situation in Poland for example pushes the EU to “slam newly passed law in Poland that could limit media freedom”¹. About media situation in Bulgaria we can read voices, who alarm about the problems: “Bulgarian media least free in EU, SEE amid smear campaigns, state harassment”.² Hungary has problems too - “Since 2010, the Hungarian government has systematically dismantled media independence, freedom and pluralism distorted the media market”.³ Unfortunately, we can say that the Covid-19 crises makes the situation worse not only in Eastern Europe but all over the world and journalists are trying to answer the question: “How are governments using COVID as an excuse to crack down on the public’s right to know?”.⁴

¹ EU slams newly passed law in Poland that could limit media freedom, <https://www.euronews.com/2021/08/12/poland-government-in-chaotic-parliamentary-tussle-over-disputed-media-ownership-bill>, accessed on 13.08.2021

² Ralev, Radomir, Bulgarian media least free in EU, SEE amid smear campaigns, state harassment, <https://seenews.com/news/bulgarian-media-least-free-in-eu-see-amid-smear-campaigns-state-harassment-rsf-738504>, accessed on 13.08.2021

³ New report: Hungary dismantles media freedom and pluralism, <https://europeanjournalists.org/blog/2019/12/03/new-report-hungary-dismantles-media-freedom-and-pluralism/>, accessed on 13.08.2021

⁴ Torsner, Sara and Harrison, Jackie, Press freedom: how governments are using COVID as an excuse to crack down on the public’s right to know, <https://theconversation.com/press-freedom-how-governments-are-using-covid-as-an-excuse-to-crack-down-on-the-publics-right-to-know-159298>, accessed on 13.08.2021

PRINT MEDIA

But that process is not a new one, especially when we talk about Eastern Europe. Press freedom is something that we discuss a lot, but somehow, we do not pay attention to the fact that that press - printed on paper - is no longer the major player in media market. And we somehow continue using press, but we have media in mind. Digitalization and other changes in our lives make the print media business much more difficult and till that moment it has not succeeded in finding a working business model for the digital times. Although we do not have all the data about newspapers sales in the recent years, the trend is shown in table 1a and 1b. We can see that the biggest drop in sales is between 1995 and 2000. We can dispute that sales are not equal to readership, but for the press, market sales are a very important part of their incomes.

Table 1a: Number of annual newspaper sales (in mil.)

GEO/TIME	1990	1995	2000	2005
Bulgaria (BG)	-	n.a	n.a	n.a
Croatia (HR)	-	150	163	n.a
Czechia (CZ)	1248	890	509	506
Estonia (EE)	231.3	65	75	75
Hungary (HU)	n.a	672	488	445
Latvia (LV)	n.a	104.3	65	73
Lithuania (LT)	-	n.a	215	n.a
Poland (PL)	n.a	1777	846	807
Romania (RO)	-	-	n.a	-
Slovakia (SK)	-	328	138	140
Slovenia (SI)	-	-	n.a	n.a

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007

The lack of data is another important element of the media market in the region. For example, in Bulgaria the National Statistical Institute published data about newspaper sales together with data

about books, newspapers and magazines; book and stationery and materials.⁵ As we can see in Slovakia between 1995 and 2000 the newspaper sales dropped by nearly 60%. In some countries there is an increase in sales, but that is only to prove the tendency of less newspaper sales in the region. That is a world tendency - in 2017, 536.6 million units of print newspapers were sold - around 700 thousand copies less than a year earlier.⁶

Table 1b: Change rate of annual newspaper sales

GEO/TIME	1990-1995	1995-2000	2000-2005
Bulgaria (BG)	-	-	-
Croatia (HR)		+8,67%	
Czechia (CZ)	-28,68%	-42,8%	-0,59%
Estonia (EE)	-71,89%	+15,38%	0%
Hungary (HU)		-27,38%	-8,81%
Latvia (LV)		-37,67%	+12,30%
Lithuania (LT)			
Poland (PL)		-52,39%	-4,60%
Romania (RO)			
Slovakia (SK)		-57,92%	+1,44%
Slovenia (SI)			

Sources: Calculations based on data in Table 1a

With the start of the political changes in Estonia in the period 1990-1995 the drop is even higher - nearly 72%. The biggest challenge in newspaper market is to enter the digital world and to still play the important role of the fourth pillar of democracy. The data shows that information websites (the sites of newspapers, magazines, etc.) are the most popular internet sources (26%, unchanged since autumn 2018).⁷ But that is different from reading a newspaper on paper. “The proportion of Europeans reading the written press daily or almost daily is unchanged since autumn 2018 (26%). In contrast, a longer-term analysis shows that it continues to lose readers: since autumn 2010, the proportion of respondents reporting that they read the written press at least once a week has

⁵ NSI, Bulgaria, <https://www.nsi.bg/bg/content/1623/%D0%BF%D1%80%D0%BE%D0%B4%D0%B0%D0%B6%D0%B1%D0%B8-%D0%BD%D0%B0-%D0%B4%D1%80%D0%B5%D0%B1%D0%BD%D0%BE>, accessed on 13.08.2021

⁶ Print daily newspaper circulation worldwide from 2013 to 2017, <https://www.statista.com/statistics/456482/worldwide-daily-print-newspaper-circulation/>, accessed on 13.08.2021

⁷ EuroBarometer 92, Autumn, 2019, page 53, <https://europa.eu/eurobarometer/surveys/detail/2255>, accessed on 13.08.2021

fallen by 18 percent (from 73% to 55%).”⁸ With that tendency in reading written press it comes as no surprise that the daily average circulation in most of the countries in the region is dropping. That is a clear mark of the situation in the press market - people are reading newspapers, but not on paper. Digital platforms are very quick in delivering the news in your pocket - literally. Most of the readers use their mobile devices to get everyday news as they happen.

Table 2: Dailies’ average circulation/Adult population (copies per thousand)

GEO/TIME	1990	1995	2000	2005	2010*
Bulgaria (BG)	-	n.a	1400	558	1142
Croatia (HR)	-	480	595	411	493
Czechia (CZ)	4800	2950	1704	1742	1543
Estonia (EE)	829	243	262	256	218
Hungary (HU)	n.a	1980	1625	1460	1444
Latvia (LV)	n.a	334,4	322	348	n.a.
Lithuania (LT)	-	-	2413	527	309
Poland (PL)	n.a	n.a	2820	4369	3367
Romania (RO)	-	-	1279	-	1620
Slovakia (SK)	-	966	541	496	404
Slovenia (SI)	-	-	341	430	n.a.

Sources: World Association of newspapers – World Trends Report 1991, 1996, 1998, 2002, 2010;

*Total paid-for and free dailies, total average circulation (000) - World Press Trends 2014, WAN-IFRA, 2014

But that is not the situation when we focus on weekly newspapers. The weekly newspapers have a broader readership than the dailies. The weekly newspapers are not competing with digital media on the grounds of speed in delivering the news, as they offer readers a deeper analysis and more details about what’s happening in the world. The weekly readership of newspapers is higher than the one of dailies in all countries in the region except for Estonia (2013, 2015), but in 2019 the situation has changed. The biggest difference - 6 times more - is in Bulgaria in 2019.

⁸ Ibid, p. 9

Table 3: Daily readership/ Weekly readership of newspapers (%)

GEO/TIME	2013		2015		2019	
	D	W	D	W	D	W
Bulgaria (BG)	10	42	10	37	5	30
Croatia (HR)	22	33	24	35	25	26
Czechia (CZ)	19	47	15	47	14	35
Estonia (EE)	41	33	44	31	31	35
Hungary (HU)	24	37	22	30	16	32
Latvia (LV)	17	48	21	43	14	34
Lithuania (LT)	28	45	31	44	17	42
Poland (PL)	10	41	12	41	9	36
Romania (RO)	14	27	11	30	9	25
Slovakia (SK)	22	48	19	37	16	30
Slovenia (SI)	35	37	33	31	28	33

Sources: Standard Eurobarometer 76 Autumn 2011, Standard Eurobarometer 84 Autumn 2015 Media Use, Standard Eurobarometer 92 Autumn 2019

An interesting fact is the number of people in those countries who answer with “Never” to the question: Could you tell me to what extend you ... read the written press?”. Over 30% answered with never read written press in Hungary (31%), Bulgaria (33%) and Romania (39%). Most of the people read written press in Croatia (only 16% never), Slovenia (16%) and Estonia (14%).

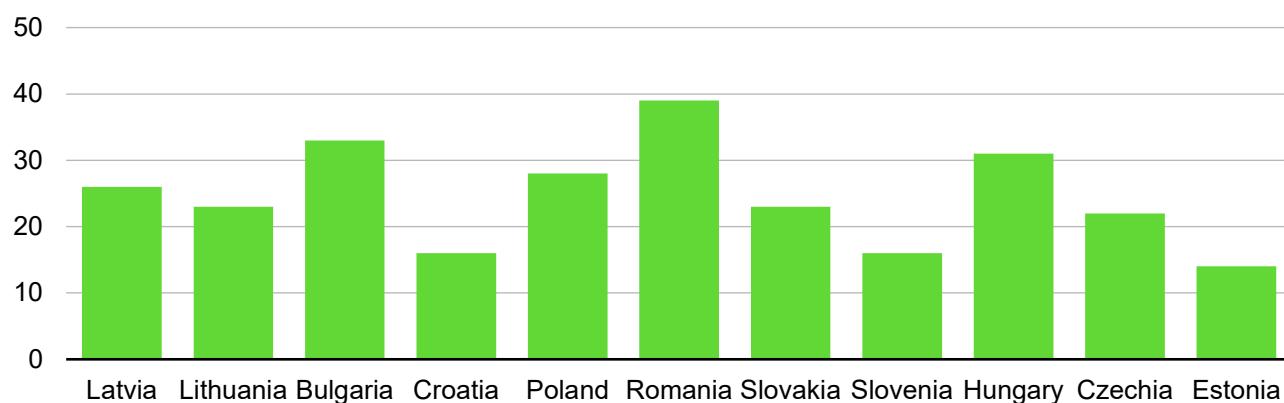


Chart 1: Percentage of people saying: “Never Read written press”

Sources: Standard Eurobarometer 92 Autumn 2019

That is to show that people use newspaper information but not by reading it on paper. And newspaper market shifts to digital each year as new generations are used to consuming information through their mobile devices. The number of daily newspaper titles looks stable compared to the numbers of circulation and readership. The Czech Republic is the only country in the region where the number of titles in the period has grown more than 3 times. Estonia and Croatia are the countries with the least changes in the number of titles.

Table 4a: Number of Daily Newspaper Titles

GEO/TIME	1990	1995	2000	2005	2010*
Bulgaria (BG)	-	n.a	43	60	71
Croatia (HR)	-	9	12	13	17
Czechia (CZ)	26	23	75	84	81
Estonia (EE)	10	15	13	11	11
Hungary (HU)	n.a	43	40	38	30
Latvia (LV)	n.a	8	21	22	n.a.
Lithuania (LT)	-	-	377	21	18
Poland (PL)	66	84	59	43	38

Romania (RO)	-	-	46	-	59
Slovakia (SK)	-	20	29	10	9
Slovenia (SI)	-	-	5	8	n.a.

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2011

* Total paid-for and free dailies, number of titles - - World Press Trends 2014, WAN-IFRA, 2014

When we look at the titles of weeklies and Non-dailies & Sunday's newspapers, we can see one trend - the changes in non-dailies & Sunday's newspaper titles are small although as a whole their number is small. Hungary is the only country in which there is an increase in titles in the segment (3 to 6).

Table 4b: Number of Weeklies/Non-dailies & Sundays Newspaper titles

GEO/TIME	1990		1995		2000		2005		2010*	
	W	S	W	S	W	S	W	S	W	S
Bulgaria (BG)	-	-	n.a	n.a	114	6	363	n.a		384
Croatia (HR)	-	-	52	n.a	245	n.a	132	n.a		n.a.
Czechia (CZ)	189	26	171	1	62	1	234	4		459
Estonia (EE)	42	3	71	n.a	49	n.a	27	n.a		28
Hungary (HU)	n.a	n.a	103	3	n.a	2	n.a	6		4
Latvia (LV)	n.a	n.a	101	n.a	59	n.a	64	n.a		n.a.
Lithuania (LT)	-	-	-	-	n.a	n.a	n.a	n.a		256
Poland (PL)	149	n.a	203	n.a	460	n.a	15	n.a		18
Romania (RO)	-	-	-	-	78	n.a	-	-		29
Slovakia (SK)	-	-	56	15	2	14	n.a	1		1
Slovenia (SI)	-	-	-	-	14	1	178	1		n.a.

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007

*Non-dailies, number of titles + Sundays, number of titles - World Press Trends 2014, WAN-IFRA, 2014

As readership is dropping down, which means that revenues from the sales of newspapers are dropping down too, advertising becomes an even more important part of newspaper market. As

more and more people are consuming information from newspapers online, we can expect that the share of newspaper advertising revenue coming from digital advertising will grow.

As we can see the % of advertising expenditure in Press is dropping in most of the countries in the region by nearly 2 times. In 1995 for example 51,5% of all advertising expenditure in Latvia was in newspapers. By 2005 that percentage dropped to 29.03. The lowest percentage is in Slovakia. The advertising market is very dynamic, and newspapers and magazine are in direct competition for expenditures with global social platforms like Facebook, Instagram, Twitter etc.

From the advertisers' point of view reaching the target audience is the goal, and they are looking for the media via which they will reach their target. The Covid-19 crises makes the situation even more difficult as people start consuming more news, but advertising expenditure drops. Some scholars called the situation a paradox as media have large audience but less advertising. Now the situation is a little bit better, but the advertising expenditures in newspaper and magazines are slowly going back to their previous levels.

Table 5: Advertising expenditure in Press (newspapers/magazines) (%)

GEO/TIME	1990		1995		2000		2005		2010*
	N	M	N	M	N	M	N	M	
Bulgaria (BG)	-	-	n.a	n.a	n.a	n.a	14,02	8,01	54
Croatia (HR)	-	-	n.a	n.a	24,06	5,06	14,03	10,07	93
Czechia (CZ)	n.a	n.a	27,03	18,07	19,04	20,03	18,06	20,01	130
Estonia (EE)	n.a	n.a	55	6	46,2	14,03	44	11,07	24,3
Hungary (HU)	n.a	n.a	45,2	n.a	14,07	14,01	20,09	21,04	126
Latvia (LV)	n.a	n.a	51,5	8	36	8	29,03	13,02	9,4
Lithuania (LT)	-	-	-	-	38,6	8	14,08	5,09	22,3
Poland (PL)	n.a	n.a	17	14	12,03	15,08	13,05	15,08	519
Romania (RO)	-	-	-	-	12,02	n.a	-	-	17,7
Slovakia (SK)	-	-	30	15	11,09	8,09	6,06	7,09	78,2
Slovenia (SI)	-	-	-	-	12	16,09	20,06	10,02	112,9

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007, 2010;

*Newspaper advertising expenditure (US\$, million, current prices) - World Press Trends 2014, WAN-IFRA, 2014

According to a forecast by the Japanese international advertising and public relations company “Dentsu” “overall, 2021 global ad spend is forecast to remain below the pre-pandemic level of US\$600 billion recorded in 2019.”⁹ The forecast presses attention in one more important thing - according to “Dentsu” the share of global ad spend by newspapers and magazines will drop too in 2022. With that tendency newspapers and magazines are in a hurry to find a working business model to successfully sell their content to the readers and advertisers - this time online or more precisely - on mobile devices.

The proportion of Europeans using the Internet every day or almost every day has risen almost continuously since the autumn 2010 survey (EB74), gaining a total of 24 percentage points (69%).¹⁰ The question of trust is also important when we talk about information. Just under a third of Europeans (32%) say that they “tend to trust” the Internet. Although the proportion of people who tend to trust this medium remains unchanged since the autumn 2018 Standard Eurobarometer survey, levels of mistrust are increasing (55% “tend not to trust”, +2 percentage points).¹¹ Here come the websites of newspapers to fill the trust gap and transfer the trust in their print content to the content on their websites. With tradition in journalism and “selling” information to the public, newspapers’ websites became their new platform for sharing content and selling advertising - online. Although data is incomplete we can assume that no media now-a-days can survive on the market without a website.

Table 6: Number of daily Newspaper websites (online editions)

GEO/TIME	2000	2005
Bulgaria (BG)	27	31
Croatia (HR)	12	10
Czechia (CZ)	10	9
Estonia (EE)	8	12
Hungary (HU)	19	24
Latvia (LV)	8	16
Lithuania (LT)	n.a	n.a
Poland (PL)	56	42
Romania (RO)	n.a	-

⁹ Global Ad Spend Forecast, Dentsu, 2021, https://assets-eu-01.kc-usercontent.com/10d7369f-8efe-0138-86fd-fa454acd4299/408coa3d-f3c1-434a-86cc-4b3478ee382e/Adspend_Report_2021.pdf, accessed on 13.08.2021

¹⁰ EuroBarometer 92, Autumn, 2019, page 53, <https://europa.eu/eurobarometer/surveys/detail/2255>, accessed on 13.08.2021

¹¹ *ibid*

Slovakia (SK)	18	11
Slovenia (SI)	3	7

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007.

RADIO

The problem with trust seems better when we focus on radio. Since 2018 trust in radio has been growing in Romania (61%, +10 percentage points) and Bulgaria (51%, +6).¹² There are 5 017 enterprises operating as radio broadcasters across the European Union (EU) in 2017. This is 300 fewer than in the previous year and 11% fewer than the 5 641 enterprises in 2013.¹³ So the tendency of dropping in numbers is correspondent to radio stations too. Among the EU member countries with highest numbers of radio enterprises from Eastern Europe is Hungary (310), compared to Estonia (10), Slovakia (16) and Lithuania (23).¹⁴ Taking into account population size, the number of radio broadcasting enterprises per million inhabitants also differs greatly between countries. The highest ratios were recorded in Slovenia (76 radio broadcasting enterprises per million inhabitants), Croatia (38) and Hungary (32), while the lowest ones were observed in Poland and Slovakia with 3 radio broadcasting enterprises per million inhabitants.¹⁵ Slovakia and Slovenia are the only two countries with positive change rate in the period 2010-2018.

Table 7: Number of radio broadcasting enterprises (both public and commercial)

GEO/TIME	2010	2015	2018	Change rate 2018/10 (%)
Bulgaria (BG)	95	67	51	-46.32
Croatia (HR)	187	165	158	-15.50
Czechia (CZ)	74	53	46	-37.84
Estonia (EE)	13	12	9	-30.77
Hungary (HU)	421	321	289	-31.35
Latvia (LV)	45	47	39	-13.33
Lithuania (LT)	29	24	21	-27.59
Poland (PL)	125	117	101	-19.2
Romania (RO)	202	175	154	-23.76
Slovakia (SK)	12	21	34	+183.33
Slovenia (SI)	131	159	153	+16.79

Sources: Eurostat (2021). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: <https://appsso.eurostat.ec.europa.eu>

¹² EuroBarometer 92, Autumn, 2019, page 53, <https://europa.eu/eurobarometer/surveys/detail/2255>, accessed on 13.08.2021

¹³ Radio broadcasting in the EU on the decline, Eurostat, <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20200213-1>, accessed on 13.08.2021

¹⁴ ibid

¹⁵ ibid

In 2017, radio broadcasting enterprises employed 48 345 people in the EU, 14% less than in 2013.¹⁶ The tendency is visible in Eastern Europe too, as Poland is the only country in the region with a positive change rate in the period 2010-2018. For example, in Slovakia just 63 persons were employed in the radio broadcasting sector in 2017.¹⁷ The number of persons employed as a percentage of total employment is low in all EU Member States, and almost zero in Czechia and Slovakia.¹⁸

Table 8: Number of employees working in the radio industry

GEO/TIME	2010	2015	2018	Change rate 2018/10 (%)
EU28 (2013-2020)	n.a	58,984	56,509	-4.2
Bulgaria (BG)	641	519	436	-31.98
Croatia (HR)	n.a	930	904	-2.80*
Czechia (CZ)	n.a	257	146	-43.19*
Estonia (EE)	n.a	180	113	-37.22*
Hungary (HU)	1,930	856	n.a	-55.65**
Latvia (LV)	243	186	230	-5.35
Lithuania (LT)	217	151	105	-51.61
Poland (PL)	4,044	3,799	5,109	+26.34
Romania (RO)	3,493	2,995	2,917	-16.49
Slovakia (SK)	68	60	40	-41.18
Slovenia (SI)	426	389	406	-4.69

*2018/2015; ** 2015/2010

Sources: Eurostat (2021). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2].

Retrieved from: <https://appsso.eurostat.ec.europa.eu>

According to “Dentsu” forecasts, we can see that in global ad spend by radio (2019-22) in percentage is not declining in the present and near future - -0.8 in 2019, -10.1 in 2020, +4.7 in 2021

¹⁶ Radio broadcasting in the EU on the decline, Eurostat, <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20200213-1>, accessed on 13.08.2021

¹⁷ ibid

¹⁸ ibid

and +1.6 in 2022.¹⁹ The other good news about radio is that the share of global ad spending remains nearly stable - 6.0% in 2019 to 5.5% in 2022.²⁰ From the countries in the region, Romania has the biggest growth - 23% in 2015. In all other countries the radio market remains stable and with no big changes at least in the share of ad expenditure. During the years radio has not used visuals to send advertising messages to its audience. We can say that radio ads engage the imagination of the listeners and make radio an effective marketing instrument and an integral part of our society.

Table 9: Radio advertising expenditure (%)

GEO/TIME	1995	2000	2005	2010	2015
Bulgaria (BG)	n.a	n.a	3	2	1
Croatia (HR)	n.a	n.a	n.a	9	9
Czechia (CZ)	7.04	3.06	5.5	6	5
Estonia (EE)	8	11.03	7.09	10	10
Hungary (HU)	8	5.03	3.09	7	4
Latvia (LV)	4.05	16.03	11.07	12	12
Lithuania (LT)	-	5.05	2.02	8	8
Poland (PL)	8	6.08	8.03	8	8
Romania (RO)	-	5.02	-	11	23
Slovakia (SK)	12	5.08	5.09	6	6
Slovenia (SI)	-	n.a	5.02	7	5

Sources: a. European Media Handbook (1997), b. European Media Handbook (2004), c. European Audiovisual Observatory, e. Data for 2019 retrieved from Statista (2021) MAR-AD Advertising expenditures by media (2001-2019) / Source: Warc / © European Audiovisual Observatory / Yearbook 2020

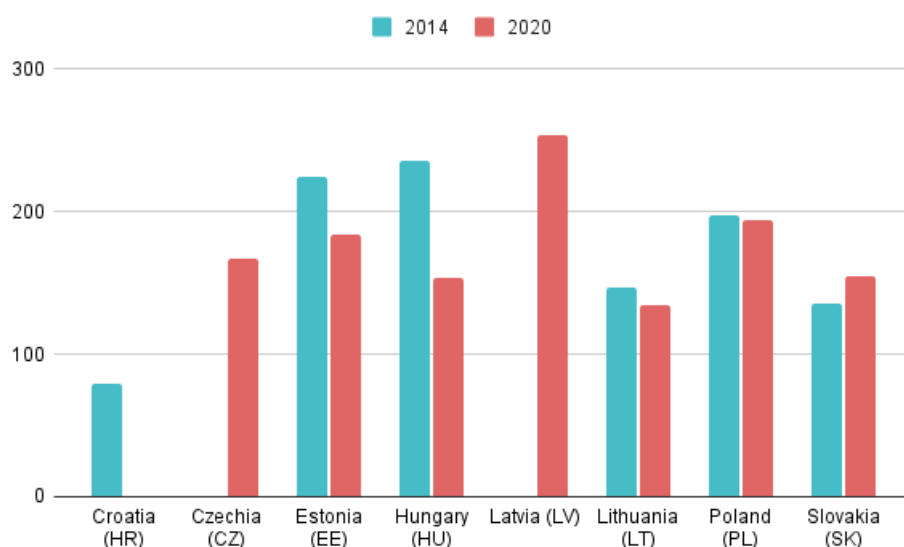
In 2019 Europeans have listened to the radio 143 minutes and in 2014 they listened 162 minutes. Comparing to the drop in readership of newspaper, that drop looks small, but young people listen to platforms such as Spotify, iTunes etc. on their mobile devices more and more. European Youths have listened to the radio 86 minutes per day which is nearly two times less than the average for all citizens in the EU - 143 minutes. This should stress the attention of radio enterprises to the

¹⁹ Global Ad Spend Forecast, Dentsu, 2021, https://assets-eu-01.kc-usercontent.com/10d7369f-8efe-0138-86fd-fa454acd4299/408coa3d-f3c1-434a-86cc-4b3478ee382e/Adspend_Report_2021.pdf, accessed on 13.08.2021

²⁰ ibid

behaviour of youth and make them think about ways to attract youngsters' attention towards digital platforms. From the countries for which we have data, Slovakia is the only one with an increase in the minutes of daily listening. The biggest drop is in Hungary with 82 minutes less.

Chart 2: Radio daily listenership in minutes (%)



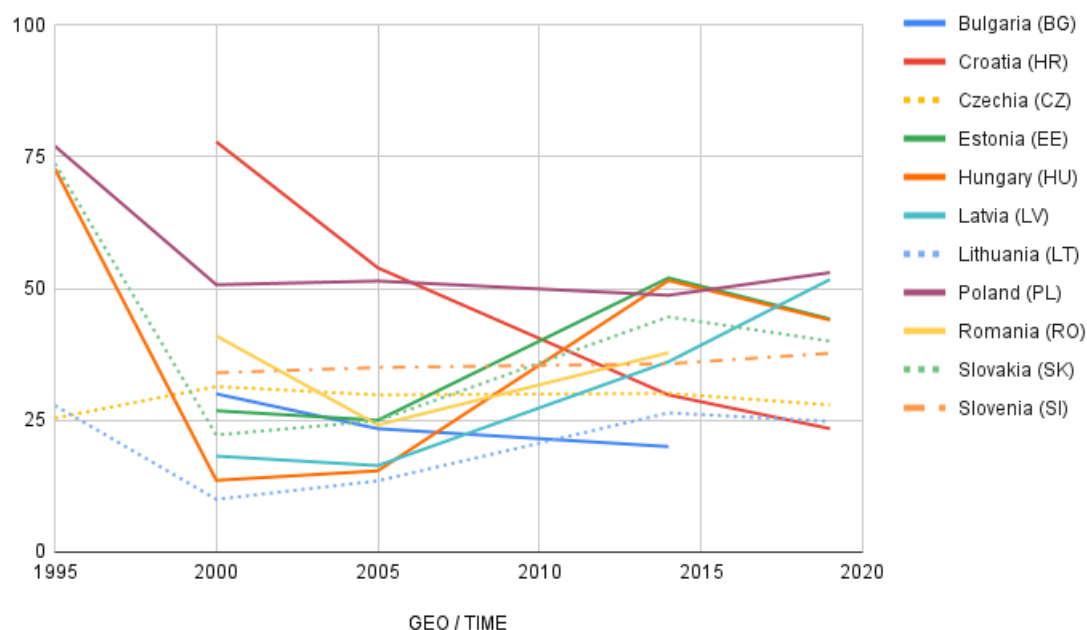
Sources: a: O. Debande & G. Chetrit (2001) *The European Audiovisual Industry: An Overview – 07/09/01 – Final version data for 1885 and 1999 respectively* b: EBU, (2007) *EBU Members' Audience Trends 1994-2006*, Grand-Saconnex: EBU. c: EBU, *Audience Trends, 2015, 2020(*) & 2021 (+) data for EU 15*

With all changes in life-style and working style, radio remains one of the most used media, but that is not for a long time, if radio enterprises do not make their content attractive to younger generations, who prefer podcasts and their own playlists, than a program, prepared by somebody else.

The situation in public radio is slightly different - in only two countries the share of the public radio has seen a growth - in Latvia the increase is by 15,6% and in Poland - by 4,3. Although the data for Bulgaria is missing, the Bulgarian public radio (BNR) became part of the political battle in the country. On the 13th of September 2019 BNR broke its obligation to 24/7 broadcasts. A day earlier, a long-time radio host was taken off air by the general director, allegedly for her critical attitude to

the prosecution service and to the only candidate for prosecutor general.²¹ The suspension caused a general outcry, and the host was restored to her job. BNR attracted political attention as with all its program it reaches 17.1% of the audience.²²

Chart 3: Public Radio listenership (share %)



Sources : EBU, Audience Trends, Radio 2015, 2020

TELEVISION

When it comes to television, we can say that in 2021 TV is trusted in almost 70% of Europe.²³ The positive trend in most EU members, by contrast, trust has decreased in 14 EU countries, two of them from Eastern Europe - Poland, and Slovakia.²⁴ In 2019 Romanians lead in the region by daily minutes spent in watching TV - 329 minutes per day or 5 hours and 29 minutes. On the other end of the extreme are the citizens of Latvia, who spend only 2 hours and 57 minutes watching TV. If we compare the daily viewing time from 2015 to the one in 2019 we will see that nearly all countries have an increase in minutes, only Hungary (1,77%) and Poland (2.66%) have a slight decrease. Of course, we can't say for sure what the reasons for the increase are, but we could be nearly sure, that in 2020 and 2021 there will be an increase, due to the Covid-19 crises. Two other countries

²¹ Prosecution Service: Bulgarian National Radio Broke Obligation for 24/7 Broadcasts, BTA, <http://www.bta.bg/en/c/DF/id/2076402>, accessed on 13.08.2021

²² GD report, 07.2020, BNR, <https://bnr.bg/files/uploads/OtchetBNR.pdf>, accessed on 13.08.2021

²³ EUB TRUST IN MEDIA 2021, September 2021, https://www.ebu.ch/files/live/sites/ebu/files/Publications/MIS/login_only/market_insights/EBU-MIS-Trust_in_Media_2021.pdf, accessed, 04.09.2021

²⁴ ibid

attracted our attention - Czech Republic and Romania, which have exactly the same viewing time in 2015 and 2019. The Internet didn't change our habit to watch TV. But for sure the Internet had changed and will continue to change our preferences on what to watch and on which channel.

Table 10: TV daily viewing time (in minutes)

GEO/TIME	2011	2014	2015	2019	Change 2019/2015
Bulgaria (BG)	-	223	231	251	+ 8.66%
Croatia (HR)	267	259	265	268	+ 1.13%
Czechia (CZ)	-	207	206	206	0
Estonia (EE)	-	220	222	226	+ 1.80%
Hungary (HU)	-	289	283	278	- 1.77%
Latvia (LV)	-	210	211	177	-16.11%
Lithuania (LT)	-	204	214	215	+0.47%
Poland (PL)	-	260	263	256	- 2.66%
Romania (RO)	262	342	329	329	0
Slovakia (SK)	207	228	228	238	+4.39%
Slovenia (SI)	186	199	205	227	+ 10.74%

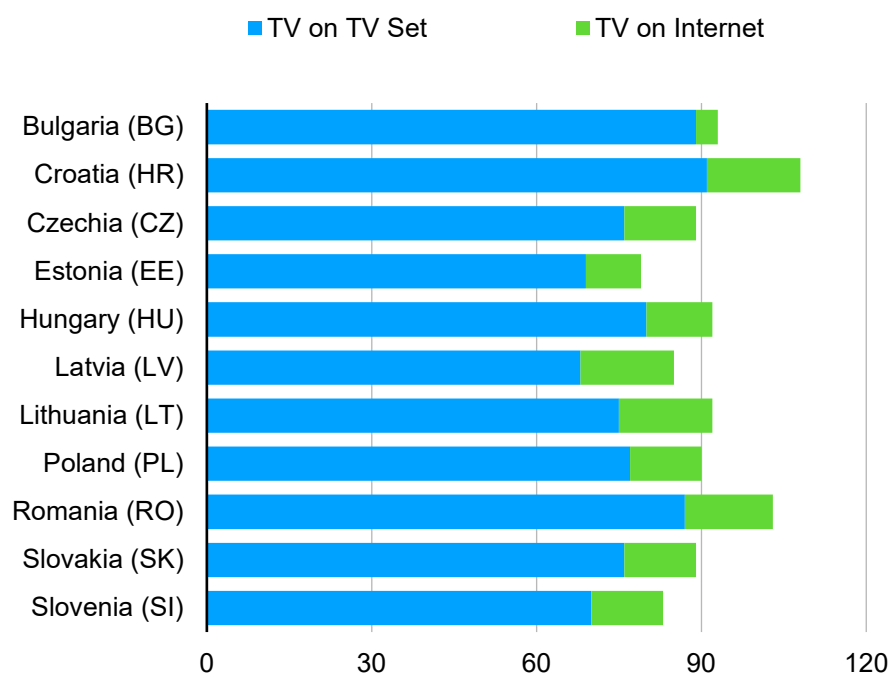
Sources: EAO - Trends in European Television 2006, vol. 2, EAO 2011 vol. 2, EAO – Yearbook 2020 EBU, TV Audiences, 2021

Till 2020 for sure most of the viewers watched TV on a TV set. And that tendency will remain stable until the new generations will come on stage. The trend to move from TV set to Internet is here, we just do not know how quickly the TV set in all rooms will become part of the past. In Croatia, Latvia and Lithuania 17% of viewers are watching TV over Internet, which is the highest percentage in Eastern Europe. On the other end of the extreme is Bulgaria with only 4%. The average percentage is 13,2% which is a tiny portion of the audience now, but for sure it will grow in the future. And when data regarding viewers during Covid-19 crisis appears, we will see what people watched in 2020 and 2021.

Chart 4: Watching TV on TV Set/ On Internet

Sources: Media use in the European Union, Eurobarometer 2019

Without further analysis we can't draw conclusions, but by systematically presenting the data we can see that the country with the lowest percentage of people watching TV over the Internet -



Bulgaria, is the country with the highest percentage of trust in TV - 65%. Croatia and Slovenia have the lowest trust in TV - 47%, which cannot be considered as a low percentage of trust in information. We will see if trust in TV was affected by Covid-19 crisis and all fake news connected to the problem. In 2021 “thousands of people took to the streets in dozens of cities across Poland, protesting what they view as more restrictions on media freedom”.²⁵ According to journalists in Poland the impact of the law in practice would be on the independent station TVN and its 24-hour news station, TVN24. TVN’s majority shareholder is the US media company “Discovery”. In Hungary a controversial anti-LGBT law went into effect despite EU’s warnings.²⁶ In Bulgaria, well-known TV investigative journalists were removed from TV to have their voices silenced.²⁷ Television is still one

²⁵ Gall, Lydia, Poland Targets TV Channel, Limits Press Freedom and Pluralism, <https://www.hrw.org/news/2021/08/12/poland-targets-tv-channel-limits-press-freedom-and-pluralism>, accessed on 13.08.2021

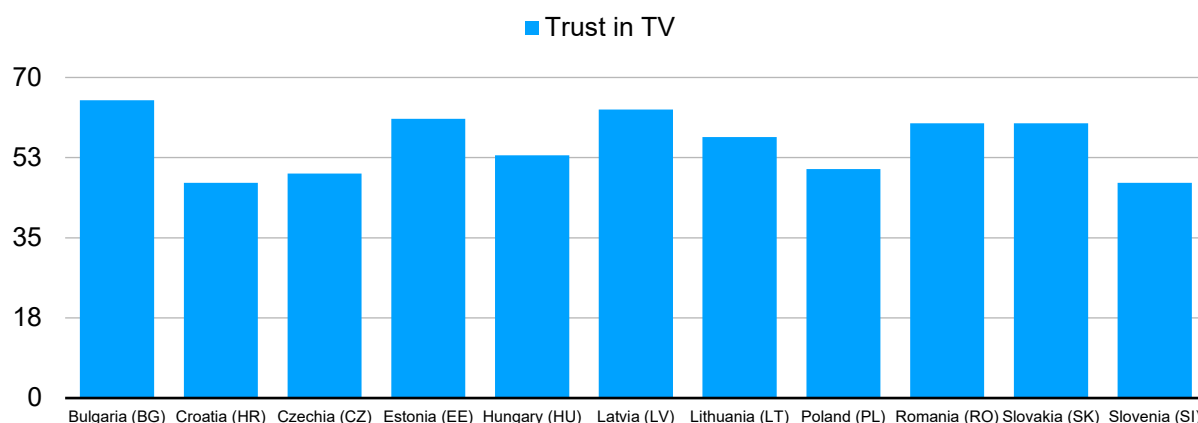
²⁶ Hungary’s controversial anti-LGBT law goes into effect despite EU warnings, <https://www.france24.com/en/europe/20210707-hungary-s-controversial-anti-lgbt-law-goes-into-effect-despite-eu-warnings>, accessed on 13.08.2021

²⁷ Паунова, Полина, Уволнени или скрити. Какво се случи със знакови журналисти в последните години <https://www.svobodnaevropa.bg/a/30144695.html>, accessed on 13.08.2021

of the most trusted media and politicians from all parties are trying to control it with different level of success.

Chart 5: Trust in TV

Sources: Eurobarometer 2019



Across Europe, an increasing number of governments are trying to silence opposition voices by restricting freedom of the press and exerting undue influence on public service media. Recently the public service media in the Czech Republic were under threat and the independence of the Czech television was under threat.²⁸ As we can see on Chart 3 the Public Television in the Czech Republic has a very stable and influential share from the market which has not changed in the last 15 years. The biggest drop in audience market in the region is in Romania where the daily audience of the public channels dropped by 20,6%. In 8 from all 11 countries in Eastern Europe, public TV channels have been losing audiences for the past 15 years, and in six of them that loss is more than 10 %. During the period 2005 - 2019 the highest percentage of TV daily audience of public channels was 39,8 - in 2010 in Poland and the lowest in 2019 in Romania - 3,5. Poland and the Czech Republic have the biggest audience in the region which could explain the political efforts to silence the free journalism in those media.

²⁸ PUBLIC SERVICE MEDIA IN THE CZECH REPUBLIC UNDER THREAT, EBU, <https://www.ebu.ch/news/2021/04/public-service-media-in-the-czech-republic-under-threat>, accessed on 13.08.2021

Table 11: Public TV viewership share (%)

GEO/TIME	2005	2010	2015	2019	Change 2019/2015	Change 2019/2010
Bulgaria (BG)	19.4	10.3	8.1	5.8	-2.3	-13.6
Croatia (HR)	-	38.2	28.4	27.1	-1.3	-11.1
Czechia (CZ)	29.8	28.3	30.4	30.1	-0.3	+1.8
Estonia (EE)	-	17.4	18.2	20.4	+2.2	3
Hungary (HU)	17.6	13.2	14.9	10.8	-4.1	-2.4
Latvia (LV)	-	13.6	12.4	12.5	+0.1	-1.1
Lithuania (LT)	-	12.1	10.3	14.9	+4.6	+2.8
Poland (PL)	-	39.8	29.4	28.6	-0.8	-11.2
Romania (RO)	24.1	7.6	4.7	3.5	-1.2	-4.1
Slovakia (SK)	25	16.1	12.7	13.9	+1.2	-2.2
Slovenia (SI)	35	30.9	21.7	20.2	-1.5	-10.7

Source: Eurodata TV Worldwide/Nielsen Television Audience Measurement, European Audiovisual Observatory, Yearbook 2020

Since the political changes in Eastern Europe, private TV stations have become part of the media market. The processes of integration of those media by global media conglomerates are still in action even today. The fact that in most of the countries in the region private TV channels have over 50% of the audience reach shows us the importance of those TV channels. Private channels in five of the countries in Eastern Europe have audiences smaller than 50% - Estonia, Hungary, Latvia, Slovakia and Slovenia. Romania is leading the private channels market with 71,8% daily audience and we have to say that in the same period private TV stations in Romania increased their audience by 20.1%. The biggest drop in audience reach is in Hungary, where for the same period private TV channels lost audience and fell by 23.4%.

Table 12: TV daily audience market share Private channels

GEO/TIME	2005	2010	2015	2019	Change 2019/2005
Bulgaria (BG)	60,3	75,6	76,5	70	+ 9.7
Croatia (HR)	n.a.	44,6	52,5	51,1	+ 6.5*
Czechia (CZ)	64	59,7	58,9	60,2	- 3.8
Estonia (EE)	n.a.	34,5	35,3	26,8	- 7.7*
Hungary (HU)	60	50,6	39,9	36,6	- 23.4
Latvia (LV)	n.a.	44	36,4	32,1	- 11.9*
Lithuania (LT)	n.a.	57,9	56,5	51,5	- 6.4*
Poland (PL)	n.a.	40,4	51,5	54,9	+ 14.5
Romania (RO)	51,7	61,5	71,2	71,8	+ 20.1
Slovakia (SK)	47,2	57,7	53,3	47,8	+ 0.6
Slovenia (SI)	35,1	38,3	44,2	36,9	+ 1.8

* 2019-2010

Source: Eurodata TV Worldwide / Nielsen Television Audience Measurement, EAO, Yearbook 2020

The TV market is no longer limited by geographical obstacles. And opposite to the fear that foreign channels will steal the audience of the local ones, that does not happen. Hungary has the biggest daily audience of foreign TV channels - 27,4% and a growth of 19.5%. The connection between the media legislation imposed by the government and the growing audience of foreign channels is logical, although we need more research to find if there is a connection between both events. Although in 2019 Estonia has a slight decline, during the period 2005 - 2019 this is the country with the most stable daily audience of foreign TV channels.

In most of the countries in the region, other TV channels attract audience market share around 20%. The biggest market share in that segment is in Slovakia - 36,6%, and the smallest is in Poland - 8,3%.

Table 13a: TV daily audience market share Foreign channels

GEO/TIME	2005	2010	2015	2019	Change 2019/2005
Bulgaria (BG)	1,6	3,7	4,1	4,5	+ 2.9
Croatia (HR)	n.a.	n.a.	3,9	1,1	- 2.8**
Czechia (CZ)	0	1,5	1	0,9	- 0.6*
Estonia (EE)	n.a.	26,1	23,4	24,5	- 1.6*
Hungary (HU)	7,9	18,9	29,8	27,4	+ 19.5
Latvia (LV)	n.a.	7,6	23,6	22,2	+ 14.6*
Lithuania (LT)	n.a.	7,2	9,6	5,9	- 1.3*
Poland (PL)	n.a.	5,7	10,1	8,2	+ 2.5*
Romania (RO)	4,1	8,7	13,3	14,2	+ 10.1
Slovakia (SK)	0	0	0	1,7	-
Slovenia (SI)	0	8,1	19,6	23	+ 14.9*

* 2019-2010, ** 2019-2015

Source: Eurodata TV Worldwide / Nielsen Television Audience Measurement, European Audiovisual Observatory, Yearbook 2020

Table 13b: TV daily audience market share Others

GEO/TIME	2005	2010	2015	2019	Change 2019/2005
Bulgaria (BG)	18,7	10,4	11,3	19,7	1
Croatia (HR)	n.a.	17,2	15,2	20,7	+ 3.5*
Czechia (CZ)	6,2	10,5	9,7	8,8	+ 2.6
Estonia (EE)	n.a.	22	23,1	28,3	+ 6.3*
Hungary (HU)	14,5	17,3	15,4	25,2	+ 10.7
Latvia (LV)	n.a.	34,8	27,6	33,2	- 1.6*
Lithuania (LT)	n.a.	22,8	23,6	27,7	+ 4.9*
Poland (PL)	n.a.	14,1	9	8,3	- 5.8*
Romania (RO)	20,1	22,2	10,8	10,5	- 9.6
Slovakia (SK)	27,8	26,2	34	36,6	+ 8.8
Slovenia (SI)	29,9	23,7	14,5	19,9	-10

* 2019-2010

Source: Eurodata TV Worldwide / Nielsen Television Audience Measurement, European Audiovisual Observatory, Yearbook 2020

Bulgarian and Romanian public TV have the biggest drop in viewership share for the period 2005 - 2019. In 2020 protesters outside the Bulgarian National TV demanded the resignation of the general director,²⁹ but those attempts failed. Czech and Poland public TV have the biggest viewership in the region. That viewership in part can explain the political appetite for gaining control over the TV stations in those countries. In an article about the media market in Poland a journalist asked the question: “How public television became an outlet for the Law and Justice party—and what it means for democracy.”³⁰ Another TV journalist confessed that “ruling politicians had never had that kind of impact on television before” in Poland.³¹ The situation in Czech is not so different as “the battle for Czech public media” continues³² and political attempts to gain control are part of the battle.

With high levels of trust in TV the attempts to gain control over public and private TV stations will continue. Although young audience is moving to the Internet as a main source of information, TV stations and their websites will be an integral part of the media market. And in times of crises like Covid-19, trust in information plays a crucial part of the success in the fight against fake news.

Nearly half of the countries (5) have a stable number of public TV channels. An interesting fact is that when we look at the number of public TV channels, we can see stability or increase. The biggest increase in numbers is in Poland where the number doubled from 6 to 12 in the period. “On the European continent, stronger government control of public broadcasters is becoming a trend, notably in Eastern Europe. In Poland, the conservatives in power have been forcing the public broadcaster TVP to fall in line with the policies of the ruling PiS party since late 2015. The entire TVP executive body was replaced by party loyalists, and some 200 independent journalists left the station.”³³ That conclusion may explain the growth in the number in Poland. But it raises the question about the role of public TV and the mechanisms of keeping those channels free.

²⁹ Protesters outside BNT continue to demand the resignation of Director General, BNT, <https://bnt.bg/news/protesters-outside-bnt-continue-to-demand-the-resignation-of-director-general-279866news.html>, accessed on 13.08.2021

³⁰ Kalan, Dariusz, Poland’s State of the Media, <https://foreignpolicy.com/2019/11/25/poland-public-television-law-and-justice-pis-mouthpiece/>, accessed on 13.08.2021

³¹ *ibid*

³² In-depth: The battle for Czech public media, <https://ipi.media/in-depth-the-battle-for-czech-public-media/>, accessed on 13.08.2021

³³ How the world’s countries provide public media, swissinfo.ch, https://www.swissinfo.ch/eng/funding-and-debates_how-the-world-s-countries-provide-public-media-/43880294, accessed on 13.08.2021

Table 14: Number of public TV channels

GEO/TIME	2005	2010	2015	2019	Change 2019/2005
Bulgaria (BG)	2	3	4	4	2
Croatia (HR)	-	4	4	4	0
Czechia (CZ)	2	4	6	6	4
Estonia (EE)	-	2	2	2	0
Hungary (HU)	3	4	5	6	3
Latvia (LV)	-	2	2	2	0
Lithuania (LT)	-	2	2	2	0
Poland (PL)	-	6	10	12	6
Romania (RO)	2	4	2	3	1
Slovakia (SK)	2	2	2	2	0
Slovenia (SI)	4	5	5	5	1

* 2019-2010

Source: Eurodata TV Worldwide/Nielsen Television Audience Measurement, EAObservatory, Yearbook 2020

"Follow the money" is a catchphrase and it should not apply to public TV stations. But... There are two types of control: financial control over how funds are used, and content-related control aimed at guaranteeing the fulfillment of the public service remit. Organs of the Council of Europe have dealt with the financing and supervision of public service broadcasting in several recommendations.³⁴ Some EU member states have recently moved away from the traditional license fee model that still exists in countries such as Germany and Austria. Alternative funding models are possible, in principle, under European rules.³⁵ Comparing the amount of money, which public audiovisual media get from government is not practical, if we do not pay attention to the specific differences in each country. But comparing what percentage of the funding came from government will form a clearer picture of the situation. Public media in Bulgaria and Slovakia receive the biggest percentage of their incomes from governments and that percentage is over 90. In Poland that percentage is the lowest during the aforementioned period but has been growing during the years. Due to the economic crisis and the following decrease of the advertising market,

³⁴ For general information about the Council of Europe's role in public service broadcasting, see: Nikoltchev, "European backing for public service broadcasting, Council of Europe rules and standards", in European Audiovisual Observatory (ed.), IRIS Special: The Public Service Broadcasting Culture, op. cit. (footnote 2), pp. 7 ff.

³⁵ IRIS plus 2010-4 Public Service Media: Money for Content, <https://rm.coe.int/1680783bb5>, accessed on 13.08.2021

states had admitted to limiting PSB revenue coming from advertising, in favor of the commercial channels. That is a controversial decision but is a way of stimulating the free media market. Between the lowest percentage of 18,7 in Poland in 2011 and the highest of 94,9 in Slovakia in 2013 there is a big opportunity for better models, as public broadcasting stations play an integral role in democratic societies and in supporting the production and distribution of content that would not appeal to commercial broadcasters.

Table 15: Financing of the public audiovisual media sector

GEO/TIME	2008		2009		2010		2011		2012		2013		2014	
	M	%	M	%	M	%	M	%	M	%	M	%	M	%
Bulgaria (BG)	68,3	92,4	65	93,6	61,1	92,3	58,9	92,3	60,6	92,7	57,6	92,7	56,4	90,9
Croatia (HR)	149,8	69,8	159,2	79,8	163,8	81	158,9	82,7	162,5	84,5	161,4	86,5	161	88
Czechia (CZ)	270,2	74,9	281,3	81,3	303,1	84,3	301,8	83,8	319,3	91,3	308,4	87,9	301,9	90,6
Estonia (EE)	29,3	91,8	27,2	91,3	24,7	86,9	25,7	90,5	26	91,2	28,8	94,5	27,6	94
Hungary (HU)	192,3	83,6	178,3	87,8	150,5	84,8	214,5	66,7	238,4	75,2	235,5	77	235,2	81
Latvia (LV)	20	66,5	18,7	76,2	15,4	71	15,5	71,8	17	75,3	18,7	78,1	21	78
Lithuania (LT)	15,6	59	12,7	65,4	10,5	60,8	12,2	63,8	13,5	65,1	14,3	68,2	15,2	68,1
Poland (PL)	168,6	23,6	110,9	23,6	101,5	19,5	88,9	18,7	105,7	27,2	129,4	30,2	154,1	35,8
Romania (RO)	n.a.	n.a.	208,4	90,8	207,6	90	212,3	91	207,1	91,6	203	94	202,1	93,6
Slovakia (SK)	78,5	75,8	92,4	89,7	92,4	90,7	107,7	94,1	91,5	93,8	95,4	94,9	97,7	93,8
Slovenia (SI)	88,7	72,3	96,7	75	95,2	71,3	89,1	68,1	99,4	75,4	96,5	76,7	97,6	76,9
average %		70,97		77,68		75,69		74,86		78,48		80,06		80,97

Source: European Audiovisual Observatory Financing of the public audiovisual media sector © European Audiovisual Observatory, Yearbook 2015

The debate about public funding is in place in the EU, and this debate should not be only about the funding of public television services but should be extended in particular to the financing of

other audiovisual media services in the public interest as digital platforms are an important part of the content which is now consumed by Europeans.

In 2019, households in European Broadcasting area (EBU) countries with a license fee paid an average of EUR 121 (and a higher EUR 135 in EU countries). This was EUR 0.33 per day per household in the European Broadcasting area (EUR 0.37 in the EU).³⁶ From the data we can see that in the region, fee for public television is under the average for the EU, with the exception of Croatia, where the fee is higher.

Table 16: TV Licence fee (in EUR)

GEO/TIME	1990	1995	2000	2005	2010	2015	2019
Bulgaria	n.a	n.a	0	n.a	n.a		
Croatia	n.a	n.a	91.18	n.a	n.a		129,41
Czech Republic	n.a	n.a	28.75	32	n.a		84,15
Estonia	n.a	n.a	0	n.a	n.a		
Hungary	n.a	n.a	0	40.1	n.a		
Latvia	n.a	n.a	0	n.a	n.a		
Lithuania	n.a	n.a	n.a	n.a	n.a		
Poland	n.a	n.a	n.a	44.5	n.a		63,39
Romania							
Slovakia	n.a	n.a	21.54	n.a	n.a		55,68
Slovenia	n.a	n.a	126.4	n.a	n.a		153

Sources: EAO – Trends in European Television 2006, vol.2, EAO – Trends in European Television 2011, vol.2, EAO – Yearbook 2015, 2019

Even commercial TV channels are facing difficulties those days. As we can see from table 17 their number in different countries is stable when comparing 2015 to 2019. Of course, we have to stress attention to the remarkable growth from 2005 to 2015, which is the period in which most of the countries became part of the EU broadcasting market and new players appeared on the stage. Croatia, Slovakia and Bulgaria have a decline but only by one channel, Slovenia and Hungary have

³⁶ EBU, EBU-MIS_Licence_Fee_2020_public_.pdf, accessed on 13.08.2021

no change, in all other countries we see slight increase in the number of channels with the biggest increase being in Romania - with 8 new channels in 2019.

Table 17: Number of commercial TV channels

GEO/TIME	2005	2010	2015	2019
Bulgaria (BG)	14	26	32	31
Croatia (HR)	-	2	18	13
Czechia (CZ)	2	12	23	28
Estonia (EE)	-	13	20	22
Hungary (HU)	17	32	48	48
Latvia (LV)	-	8	15	22
Lithuania (LT)	-	10	12	13
Poland (PL)	-	17	88	93
Romania (RO)	16	21	66	74
Slovakia (SK)	3	5	8	7
Slovenia (SI)	2	15	83	83

Source: EAO – Trends in European Television 2006, vol.2, EAO – Trends in European Television 2011, vol.2, EAO – Yearbook 2015, 2019

The region of Eastern Europe has historically been dominated by local players and traditional linear TV, but Digital TV Research predicts that the injection of major US players will see Eastern Europe follow the west with regards to SVODs.³⁷ But until that moment comes, cable TV remains the most used form of watching TV in the region. We can see the trend of decreasing the number of households, which are subscribers of analogue Cable TV. At the moment the number of digital

³⁷ Easton, Jonathan, TBI Tech & Analysis: How Eastern Europe is embracing SVOD, <https://tbivision.com/2021/04/01/tbi-tech-analysis-how-eastern-europe-is-embracing-svod/>, accessed on 13.08.2021

subscribers is growing but is not bigger than analogue. In table 18 we can see the total number of subscribers of cable - both analogue and digital. And we can see that in some countries that number is decreasing nearly two times in the period - Bulgaria and Slovakia, and a significant increase in Romania.

Table 18: Households subscribing to cable (Analogue & digital, in thousand)

GEO/TIME	2007	2008	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bulgaria (BG)	1 280	1176	1196	904	827	820	816	634	607	584	572	564
Croatia (HR)	133	136	141	147	145	150	154	156	159	169	178	177
Czechia (CZ)	818	842	821	800	770	739	707	875	845	841	837	817
Estonia (EE)	220	231	209	208	199	199	211	213	211	210	206	203
Hungary (HU)	2165	2204	2185	2004	1947	1951	1847	1893	1906	1905	1967	1951
Latvia (LV)	320	329	338	315	302	300	299	215	224	217	210	204
Lithuania (LT)	383	422	420	437	444	443	428	398	377	376	350	332
Poland (PL)	4380	4440	4485	4480	4450	4400	4350	4600	4600	4480	4440	4426
Romania (RO)	3550	3490	3410	3570	3790	4120	4375	4560	4740	5000	5270	5430
Slovakia (SK)	743	758	745	874	870	689	834	320	312	320	323	327
Slovenia (SI)	303	290	254	260	257	263	286	272	260	258	251	250

Source: IHS, European Audiovisual Observatory, Yearbook, 2015, Ampere Analysis, IHS, OBS, Yearbook 2020

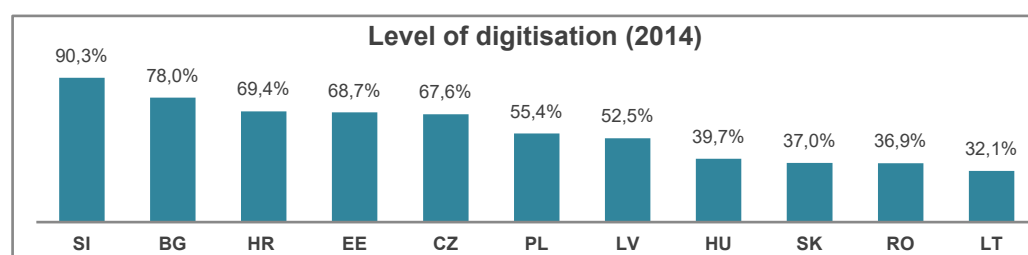
If we look on the data on table 19 we can see that in more than half of the countries the level of digitalization is over 50% and in Slovenia it is 90,3%. Digitalization is one of the processes which has started at the same time in nearly all EU members, no matter of the history of the country.

Table 19: Level of TV digitalization

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
BG	0.0	0.2	1.0	1.9	2.6	4.7	6.5	9.6	13.9	19.9
HR	0.0	0.1	0.3	0.7	0.8	1.8	3.3	5.9	8.4	12.0
CZ	0.4	1.1	3.9	7.7	11.8	7.7	11.5	18.7	29.4	45.4
EE	1.0	1.6	2.3	2.6	3.2	0.5	1.0	2.1	3.3	5.0
HU	0.8	1.5	3.1	4.7	6.3	3.0	6.2	11.9	19.0	29.7
LV	0.2	0.4	0.9	1.3	1.4	0.6	1.3	2.5	3.8	5.8
LT	0.3	0.4	0.6	0.8	1.0	2.2	3.9	6.9	9.7	13.9
PL	17.1	25.3	42.0	43.8	54.2	60.1	86.1	123.2	180.4	245.0
RO	0.1	0.1	2.2	5.9	10.8	5.9	14.5	23.6	34.2	48.8
SK	0.7	1.1	2.6	4.3	6.2	4.1	5.8	8.9	13.4	19.8
SI	0.8	1.2	3.0	4.0	5.5	4.0	5.2	7.3	9.7	12.9

Source: IHS, European Audiovisual Observatory, Yearbook 2015

Without any doubt the Covid-19 crisis was and still is a major opportunity for all on-demand audiovisual services. “The Eastern European OTT market is set to triple by 2025”, claims a new report.³⁸ According to new figures from Digital TV Research, Russia and Poland will generate two-thirds of the total by 2025 – 40% for the former, and 27% for the latter. For sure the market is changing and new on-demand services, which are part of the culture of the new generation, will step firmly on the media market not only in Eastern Europe. The growth in revenues is remarkable in all countries, and the biggest is in Poland - the increase is almost 15 times.

Chart 6: Total consumer revenues for on-demand audiovisual services

(EUR million, Include consumer revenues for SVOD, TV VOD, online film and online TV on-demand services.

Sources: Ampere Analysis, OBS in EAO 2020 Yearbook.

³⁸ Easton, Jonathan, OTT market in Eastern Europe set to triple by 2025, <https://www.digitaltveurope.com/2020/04/16/ott-market-in-eastern-europe-set-to-triple-by-2025/>, accessed on 13.08.2021

The European Audiovisual Observatory published a report about the situation of the industry in the time of Covid-19³⁹. For sure we have to start making conclusions from the crises and soon after that we have to pay attention to the global media market and the place of European media content and distribution. Those relatively new players can take a significant part of the advertising expenditures, as advertisers are interested in media, which can effectively bring their message to the target audience.

Table 20: Advertising expenditure in mill EUR/%

GEO/TIME	2010		2011		2015		2019		% Change 2019/2011
	M	%	M	%	M	%	M	%	%
Bulgaria (BG)	240,5	74	260,7	74	371,7	81	690,5	86	12
Croatia (HR)	107,6	47	105,9	50	97,3	51	103,5	44	-6
Czechia (CZ)	358,9	39	376,3	41	352,4	36	584,1	32	-9
Estonia (EE)	21,1	32	22,9	32	25,4	30	26,3	27	-5
Hungary (HU)	198	33	214,1	35	185,1	30	241,7	28	-7
Latvia (LV)	-	-	31	45	33,3	43	34,9	41	-4
Lithuania (LT)	-	-	47	48	46,1	46	52,3	44	-4
Poland (PL)	-	-	920,8	46	984,6	41	1037,8	37	-9
Romania (RO)	-	-	213,6	53	216,2	67	308	64	11
Slovakia (SK)	-	-	229,5	47	315,3	49	805,4	68	21
Slovenia (SI)	-	-	72,5	38	136,7	59	179,7	58	20
~				46%		48,5%		48,1%	

Source: European Audiovisual Observatory, Yearbook 2015, 2016, 2020

Bulgaria is the only country in the region in which advertising expenditure in TV is above 70%. In 2019 that percentage increased to 86%. That data about Bulgaria can explain the bad situation of the press in the country, as nearly all advertising money are directed to TV.

³⁹ Cabrera Blázquez F.J., Cappello M., Chochon L., Fontaine G., Talavera Milla J., Valais S., The European audiovisual industry in the time of COVID-19, European Audiovisual Observatory, Strasbourg, June 2020

In all other countries the percentage is around 50% of the market. Estonia and Hungary are the two countries with the lowest percentage of TV advertising, below the average for the region. The place of TV in advertising market is going down in most of the countries, except for Bulgaria, Romania, Slovakia and Slovenia. TV stations will have to find ways to compete against new audio-visual platforms which attract more and more of the attention of advertisers all over the world. According to “Denstu” Forecast the share of Digital in global ad spend will grow from 42.8% in 2019 to 51.2% in 2022⁴⁰. From experience, we know that sooner or later global tendency in advertising and media would affect all countries.

INTERNET

We have to remember a phrase coined by the Canadian communication theorist Marshall McLuhan “The medium is the message”. Internet not only makes information accessible 24/7, but it changes the way we consume, produce and distribute information. Not to mention that the Internet allows users of information to participate in the process of creating, sharing and consuming news. According to the New Yorker, Estonia is called “Digital Republic”⁴¹ which is showing the digitalization processes in the country and how far ahead are they compared to others in the region. More than 25% of the Eastern European households subscribe to fixed broadband services with average connection speeds faster than 15 Mbps.⁴² The number of “UHD ready” broadband subscriptions in Eastern Europe markets has risen by 286% over the last three years from 3.7 million in 2013 to 14.2 million in 2016.⁴³ The connection speeds have been rising constantly over recent years, with Romania, Czech Republic, Latvia, and Bulgaria leading the pack. Those four countries have an overall average speed exceeding 15 Mbps. Croatia is lagging far behind with an average speed of 8.6 Mbps as of the first quarter, the only Eastern European country below double-digit speeds.⁴⁴ As we can see from data in table 22 the percentage of households with broadband internet is nearly over 80% in all countries. That is to show that new technologies enter in the Eastern countries with the same speed as in the rest of EU members.

⁴⁰ ⁴⁰ Global Ad Spend Forecast, Dentsu, 2021, https://assets-eu-01.kc-usercontent.com/10d7369f-8efe-0138-86fd-fa454acd4299/408coa3d-f3c1-434a-86cc-4b3478ee382e/Adspend_Report_2021.pdf, accessed on 13.08.2021

⁴¹ Heller, Nathan, Estonia, the Digital Republic, The New Yorker, <https://www.newyorker.com/magazine/2017/12/18/estonia-the-digital-republic>, accessed on 13.08.2021

⁴² Gaber, Piotr, Eastern European Fixed Broadband Connection Speeds on The Rise, <https://www.spglobal.com/marketintelligence/en/news-insights/blog/eastern-european-fixed-broadband-connection-speeds-on-the-rise>, accessed on 13.08.2021

⁴³ *ibid*

⁴⁴ *ibid*

Table 21: Percentage of HH with broadband internet (%)

Country	2011	2015	2019	2020
Bulgaria (BG)	40	59	75	79
Croatia (HR)	56	76	81	85
Czechia (CZ)	78	79	83	85
Estonia (EE)	65	87	90	89
Hungary (HU)	59	75	86	87
Latvia (LV)	59	74	83	88
Lithuania (LT)	56	67	81	82
Poland (PL)	61	71	83	90
Romania (RO)	31	65	82	84
Slovakia (SK)	55	78	80	85
Slovenia (SI)	67	78	89	90

Source: Statista.com

Fixed broadband subscriptions include the total number of subscriptions to the following broadband technologies with download speeds of 256 kbit/s or greater: DSL, cable modem, fibre-to-the-home and other fixed technologies (such as broadband overpower lines and leased lines). This indicator is measured in number of subscriptions per 100 inhabitants.

Table 22: Fixed broadband subscriptions per 100 inhabitants

GEO/TIME	2000	2005	2010	2015	2019	Change 2019/2005
Bulgaria	n.a	2.15	15.15	22.42	28.78	26.63
Croatia	n.a	2.65	19.36	23.3	27.96	25.31
Czech Republic	0.02	6.91	21.46	27.79	34.98	28.07
Estonia	n.a	13.22	26.12	29.67	32.53	19.31
Hungary	0.03	6.46	21.75	27.81	32.94	26.48
Latvia	0.01	2.70	20.52	25.2	26.69	23.99
Lithuania	n.a	7	21.75	28.42	28.69	21.69
Poland	n.a	2.46	15.28	19.10	20.54	18.08
Romania	n.a	1.76	14.66	21.39	27.25	25.49
Slovakia	n.a	3.36	16.23	23.43	29.05	25.69
Slovenia	n.a	9.86	23.03	27.47	30.21	20.35

Sources : 2019 <https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2019&start=1998>, 2015
<https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2015&start=1998>, 2010
<https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2010&start=1998>, 2005
<https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2005&start=1998>, 2000
<https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2000&start=1998>

The reach of the fixed broadband connection in Eastern Europe has dramatically changed from 2000 to 2019. An interesting fact is that Estonia, which was far ahead of others country in 2005 is no longer the leader in 2019. The biggest increase is in the Czech Republic - the country with the biggest number of subscriptions in 2019 - 34,98 per hundred inhabitants.

Mobile broadband is the marketing term for wireless Internet access via mobile networks. Mobile Broadband keeps Wi-Fi devices connected when you're on the move. Mobile broadband subscriptions have encountered a tremendous growth during the period (2010-2020) in all of the countries under examination. Six countries have reached a result over a hundred in 2020, and Estonia is the leader in that indicator with 164,8. On the queue is Slovenia with 86,8. The Czech

Republic, which leads in fixed broadband subscriptions is far from the top in mobile. In the next years more and more inhabitants will use 5G. Mobile access to Internet is the preferred way for young people and those numbers will continue to grow in the next years. Mobile data usage soared by more than 30% on average in 2020 across the 35 OECD countries for which data were available, with 29 countries showing an increase of over 20%.⁴⁵ Mobile broadband subscriptions grew by almost 3% in 2020 across OECD countries. Estonia is one of the three countries with highest mobile Internet penetration and with subscriptions per 100 inhabitants at 165% in 2020⁴⁶.

Table 23: Mobile broadband subscriptions per 100 inhabitants

GEO/TIME	2010	2015	2019	2020
Bulgaria*	34.8	80.3	105.6	106.4
Croatia*	7.6	73.6	83.2	105.7
Czech Republic	5.2	73.6	92.7	94.5
Estonia	17.5	101.1	157.7	164.8
Hungary	7.8	40.1	73.4	75.4
Latvia	36.4	80.1	132.4	140.2
Lithuania	8.86*	76.6	104.4	114.2
Poland	48	61.5	117	124.6
Romania*	10	69.1	87.5	92
Slovakia	20.8	68	89.2	88.3
Slovenia	24.2	47.8	83.7	86.8

Source: *data is from <https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx>

Mobile-broadband subscriptions (excel) divided by population from <https://www.worldometers.info/world-population/>; <https://data.oecd.org/broadband/mobile-broadband-subscriptions.htm>

The “Digital Republic” - Estonia - is the leader in the region in numbers of individuals who are using the Internet - nearly 90% of the population. At the end of the row is the population of Bulgaria - with 68%. As we can see from the data in table 23 in eight of the countries that percentage is over 80, which clearly shows that the Internet is used as a main tool for work, information and entertainment. That percentage for all countries in the region is higher than the average for the

⁴⁵ OECD broadband statistics update, <https://www.oecd.org/digital/broadband-statistics-update.htm>, accessed on 13.08.2021

⁴⁶ ibid

world. According to Statista “as of January 2021 there were 4.66 billion active internet users worldwide - 59.5% of the global population. Of this total, 92.6 percent (4.32 billion) accessed the internet via mobile devices”.⁴⁷ That number is growing very fast. “More than 330 million people started using the Internet in the past 12 months, taking the total number of global internet users up to 4.72 billion by the start of April 2021”.⁴⁸ The average percentage for Eastern Europe in 2019 is 80,88, which is significantly higher than the average for the global population. It’s possible that the growth will go even faster than in the past years, especially because the access to the Internet has become even more important during the pandemic of Covid-19.

Table 24: Percentage of individuals using the Internet (% of population)

GEO/TIME	2000	2005	2010	2015	2016	2017	2018	2019
Bulgaria (BG)	5,371	19,97	46,23	56,656	59,826	63,41	64,782	67,947
Croatia (HR)	6,645	33,14	56,55	69,845	72,697	67,096	75,295	79,08
Czechia (CZ)	9,781	35,27	68,82	75,669	76,481	78,719	80,688	80,867
Estonia (EE)	28,577	61,45	74,1	88,41	87,24	88,102	89,357	89,532
Hungary (HU)	7	38,97	65	72,835	79,259	76,751	76,074	80,372
Latvia (LV)	6,319	46	68,42	79,201	79,842	80,114	83,577	86,135
Lithuania (LT)	6,427	36,22	62,12	71,378	74,377	77,615	79,723	81,582
Poland (PL)	7,285	38,81	62,32	67,997	73,301	75,985	77,542	84,516
Romania (RO)	3,614	21,5	39,93	55,763	59,504	63,747	70,681	73,657
Slovakia (SK)	9,427	55,19	75,71	77,635	80,476	81,626	80,449	82,854
Slovenia (SI)	15,11	46,81	70	73,099	75,449	78,885	79,75	83,108

Source: International Telecommunication Union (ITU)

Some researchers suggest that we spend 40 percent of our waking lives online⁴⁹. According to analysis people spend 22% of their time online in social networking, 21% in searches, 20% reading content.⁵⁰ As we can see these global data are showing us a trend and media have to adapt to it. Estonia again is the leader of percentage of individuals who are using the Internet for reading online news sites, newspapers, and magazines - 80%. On the queue are the individuals from Romania (37%) and Bulgaria (41%). Both countries are the only ones below the average percentage for EU27 and EU28 in 2019. There are some benefits for individuals reading news online: less expensive, eco-

⁴⁷<https://www.statista.com/statistics/617136/digital-population-worldwide/#:~:text=How%20many%20people%20use%20the,the%20internet%20via%20mobile%20devices.>

⁴⁸ DataReportal, <https://datareportal.com/reports/6-in-10-people-around-the-world-now-use-the-internet>, accessed on 13.08.2021

⁴⁹ DataReportal, <https://datareportal.com/reports/6-in-10-people-around-the-world-now-use-the-internet>, accessed on 13.08.2021

⁵⁰ Infographic, <https://visual.ly/community/Infographics/computers/how-people-spend-their-time-online>, accessed on 13.08.2021

friendly, instant edit and update, get a large amount of information and it is easy to carry anywhere.⁵¹

Table 25: Percentage of individuals using Internet for reading online news sites, newspapers, and magazines

GEO/TIME	2013	2014	2015	2016	2017	2019	2020
EU27 (from2020)	47	51	53	56	60	62	
EU28 (2013-2020)	48	52	54	57	61	63	
Bulgaria (BG)	38	41	40	41	47	45	41
Croatia (HR)	56	54	62	66	61	72	72
Czechia (CZ)	63	69	70	-	77	80	79
Estonia (EE)	73	76	80	78	79	81	80
Hungary (HU)	60	65	62	70	65	67	70
Latvia (LV)	64	65	69	67	68	68	73
Lithuania (LT)	62	68	67	69	72	74	74
Poland (PL)	27	47	47	58	60	60	65
Romania (RO)	29	38	37	38	44	40	37
Slovakia (SK)	43	52	51	59	63	60	69
Slovenia (SI)	57	58	56	60	61	63	71

Source: Eurostat <http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

We have to accept all those benefits, but we have to also think about the concerns and the biggest is Fake News. Although “Fake News” is a term that has come to mean different things to different people, we can agree on the fact that fake news create problems in media and communication. That is way the EU Commission is tackling the spread of online disinformation and misinformation to ensure the protection of European values and democratic systems.⁵² “The spread of both disinformation and misinformation can have a range of consequences, such as threatening our democracies, polarizing debates, and putting the health, security and environment of EU citizens at risk.⁵³ The Code of Practice on Disinformation⁵⁴ lays out a set of worldwide self-regulatory

⁵¹ Kumar, Nikhil, Advantages of reading news online, IJR, <https://internationaljournalofresearch.com/2020/06/11/advantages-of-reading-news-online-by-nikhil-kumar/>, accessed on 13.08.2021

⁵² Tackling online disinformation, <https://digital-strategy.ec.europa.eu/en/policies/online-disinformation>, accessed on 13.08.2021

⁵³ ibid

⁵⁴ Code of Practice on Disinformation, <https://digital-strategy.ec.europa.eu/en/policies/code-practice-disinformation>, accessed on 13.08.2021

standards for industry. At the same time initiatives which focus on media literacy are welcome in all EU.

Table 26: Percentage of individuals using Internet for watching internet streamed TV videos

GEO/TIME	2016	2018	2020
EU27 (from 2020)	54	59	
EU28 (2013-2020)	56	61	
Bulgaria (BG)	27	30	31
Croatia (HR)	60	64	70
Czechia (CZ)	50	53	63
Estonia (EE)	66	66	71
Hungary (HU)	56	48	71
Latvia (LV)	53	58	66
Lithuania (LT)	51	64	67
Poland (PL)	39	50	50
Romania (RO)	21	18	29
Slovakia (SK)	41	36	57
Slovenia (SI)	53	62	72
Average	45,5	47,2	56

Source: Eurostat <http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

Watching videos online is one of the main activities for younger generations. Video streaming consumption increased by 60% in 2019 in the world.⁵⁵ Streaming viewing is up 65% in Europe year over year. Europe's report for Q2 2021 reveals streaming growth in Europe held onto the pandemic gains, growing 19% year over year, and outpacing the global streaming growth (13%) for the same time period. Western Europe led Europe's streaming growth with 32% year over year gains, followed by northern Europe at 23%. Viewership in Southern and Eastern Europe was down 1% year over year.⁵⁶ We find the same conclusion from the data in table 26. Average EU27 and EU28 percentage of individuals watching videos is higher than the average for the countries in Eastern Europe, although it is growing from 2016 to 2020. Bulgaria (31%) and Romania (29%) are on the

⁵⁵ Easton, Jonathan, Video streaming consumption increased by 60% in 2019, <https://www.digitaltveurope.com/2020/02/05/video-streaming-consumption-increased-by-60-in-2019/>, accessed on 13.08.2021

⁵⁶ New Conviva Data Reveals Streaming in Europe Holding onto Pandemic Gains with 19% Year-over-year Growth, <https://www.businesswire.com/news/home/20210908006109/en/5043361/C2%AO-New-Conviva-Data-Reveals-Streaming-in-Europe-Holding-onto-Pandemic-Gains-with-19-Year-over-year-Growth>, accessed on 09.09.2021

bottom, and Slovenia (72%), Estonia (71%) and Hungary (71%) are on the top. As we mentioned people spend 22% of their online time in social networking. From the data in table 27 we can see that the daily users of social media have grown by 68% from 2015 to 2019 in Eastern Europe. By that indicator countries in the region do not make exception from EU28. The percentage of weekly users is dropping in five of the countries and have no change in another two. Among all countries the number of daily users is growing most remarkably in Bulgaria and Slovakia.

Table 27: Percentage of Daily/Weekly Social media users

GEO/TIME	2015		2019		Change 2019-2015	
	Daily	Weekly	Daily	Weekly	Daily	Weekly
EU28 (2013-2020)	35	15	48	16	13	1
Bulgaria (BG)	32	15	54	12	22	-3
Croatia (HR)	37	11	53	11	16	0
Czechia (CZ)	28	17	44	20	16	3
Estonia (EE)	42	11	55	12	13	1
Hungary (HU)	31	18	44	23	13	5
Latvia (LV)	44	12	55	11	11	-1
Lithuania (LT)	38	12	57	10	19	-2
Poland (PL)	28	20	39	22	11	2
Romania (RO)	31	13	48	12	17	-1
Slovakia (SK)	32	18	52	11	20	-7
Slovenia (SI)	32	13	46	13	14	0
average %	34	15	50	14		

Source: Eurobarometer 84, 92

The data about daily and weekly percentage of users of social media is important, but we need to look in details to see what social media Europeans are using. According to Statcounter in August

2021 Europeans prefer Facebook (79%) followed by Twitter (6.57) and Pinterest. (4,9%). That data do not take into account local platforms, which may attract users in different countries.

Table 28: Social Media Stats in Europe August 2021

Facebook	Twitter	Pinterest	Instagram	Tumblr	YouTube
78.89	6.57	4.9	3.55	2.62	2.07

Source: Statcounter⁵⁷

The percentage of individuals participating in social networks has nearly doubled in all countries for the mentioned period - 2011-2020. With the exception of 2019 during all other years the average percentage in Eastern Europe is lower than the one for EU27 and EU28. In 2020 Hungary has the highest percentage (74%), and Bulgaria (55%) and Poland (55%) - the lowest. With more than half of the individuals participating in social networks, those platforms became more and more important in shaping public opinion not only in Eastern Europe, but all over the world. Striking the balance between innovation and regulation is key for the future of social media and networks. Key competence for responsible use of social media platforms is the media literacy, which is in the focus of many EU initiatives. From the countries in Eastern Europe only Estonia (3rd) is in the top of the ranking of the Media Literacy Index 2021.⁵⁸ Compared to 2017 Lithuania (+2) index has improved. In terms of decrease in the ranking, the highest drop over the years is registered by Slovenia (-5 positions), Poland (-2), the Czech Republic (-2) and Latvia (-2). In terms of decrease in scores, the biggest drop compared to previous years is registered by Slovakia (-6 points), Latvia (-4), Romania (-4), Slovenia (-3) and Czech Republic (-3). Romania and Bulgaria are at the queue of the index in 2021.⁵⁹

⁵⁷ Statcounter, <https://gs.statcounter.com/social-media-stats/all/europe>, accessed on 01.09.2021

⁵⁸ Media Literacy Index 2021, OIS, <https://osis.bg/?p=3750&lang=en>, accessed on 13.08.2021

⁵⁹ Media Literacy Index 2021, https://osis.bg/wp-content/uploads/2021/03/MediaLiteracyIndex2021_ENG.pdf, accessed on 13.08.2021

Table 29: Percentage of individuals participating in social networks

GEO/TIME	2011	2013	2014	2015	2016	2017	2018	2019	2020
EU27 (from 2020)	36	41	44	48	49	52	54	54	
EU28 (2013-2020)	38	43	46	50	52	54	56	57	
Bulgaria (BG)	30	37	40	42	45	50	51	53	55
Croatia (HR)	32	38	40	45	50	47	54	58	57
Czechia (CZ)	27	36	40	41	45	48	56	59	59
Estonia (EE)	37	49	51	56	57	60	62	65	65
Hungary (HU)	51	56	60	61	66	65	65	69	74
Latvia (LV)	55	54	53	58	57	60	61	65	67
Lithuania (LT)	35	44	47	46	50	54	58	61	61
Poland (PL)	36	35	37	41	44	48	50	53	55
Romania (RO)	25	33	36	44	44	52	61	60	65
Slovakia (SK)	48	49	50	54	57	59	60	59	64
Slovenia (SI)	32	38	42	37	38	45	49	52	67
Average%	34,4	39,3	41,5	43,9	46,2	48,9	52,4	54,6	57,6

Source : Eurostat, <http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

Countries in Eastern Europe have a lot in common, but media market in different countries has its own specifics. Eastern Europe Media market grew from \$47.43 billion in 2010 to \$64.26 billion in 2019 at a CAGR of 3.40%. The outbreak negatively impacted the media market in Eastern Europe. Uncertain economic conditions and decreased revenues of companies resulted in a decline in advertising spend. The market is then expected to grow in 2020 and to reach \$179.65 billion in 2030 at a CAGR of 10.40%.⁶⁰ Changes are the only stable factor in media market today. More people are willing to spend money on independent reporting and initiatives designed to create change in the

⁶⁰ Eastern Europe Media Market Briefing 2020: Covid 19 Impact and Recovery, Market Research, <https://www.marketresearch.com/Business-Research-Company-v4006/Eastern-Europe-Media-Briefing-Covid-13366969/>, accessed on 13.08.2021

media industry. The media startups from Eastern Europe are growing in number and influence.⁶¹ So we have to expect new players on the stage soon.

⁶¹ Media Startups from Eastern Europe, <https://www.iac-berlin.org/assets/downloads/2106-Spotlight-Media-Startups-from-Eastern-Europe.pdf>, accessed on 13.08.2021

WP1- Appendix to the Market Reports: Insights into media consumption patterns

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This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101004488

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**WP1- Appendix to the Market Reports:
Insights into media consumption patterns**

Andrea Miconi

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(1) Rationale

This part of the report aims at providing more detailed insights about the patterns in media consumption, as they have emerged from the WP1 secondary analysis. A task-oriented reading of statistic proceedings and scientific literature has been made, in order to extract data disaggregated by age group, gender, social class, or individual lifestyle. As it was expected, and it is quite common, data metrics are sometimes inconsistent and hardly compatible with each other; and this relevant issue will be addressed at a later stage, while working at the aggregate automated analysis. Here we will sketch the most significant features so far, related to consumption patterns in, respectively: newspapers and news; radio; Tv; web and social media. Some more advanced analyses of media audiences in Europe will be presented in the final section.

When compared to the core reports of Work-Package 1, this paper is not based on the classical media systems model [Mancini & Hallin 2004; 2012], as its intention is that of collecting data and looking for possible constants and variants, in a possibly unsupervised and – so to speak - unbiased fashion. When compared to the other deliverables, therefore, this document will offer a background analysis; and whether regularities and patterns will emerge is still an open question. With this respect, these contents will also be used to plan a more granular quantitative analysis, to be delivered at the end of WP1, as they are meant to connect the framework of regional and market reports with the large-scale data clustering to come.

(2) Patterns in newspapers and news consumption

(2.1) General data on news readers

Overall, the decline of newspapers is a well-known tendency, also affecting the most credited paper media outlets. According to the World Association of News Publishers, for instance, newspapers diffusion has been declining everywhere in the West, in the last decades. Even the most read newspapers, in their turn, reveal a low figure: in the UK, *Daily Mail* has a 7% reaching, with *Sun*, *Guardian* and *Observer* hitting 4-5% of the national potential audience; in France, *Le Monde* and *Le Figaro* respectively sell 393,103 and 331,927 daily copies; in Italy, *Corriere della Sera* and *La Repubblica* respectively 204,082 and 158,328 copies; in Germany, *Bild* sells 427,024 copies. A synthesis of this sharp decline in paper press circulation is provided in table 1.

Table 1. People reading traditional newspapers “every-day or almost every-day” in the EU, 2011-2020

Year	Percentage of strong readers
2011	36%
2012	37%
2013	33%
2014	33%
2015	31%
2016	29%
2017	28%
2018	26%
2019	26%
2020	25%

[Source: Statista]

Table 2. People reading written press in Europe, 2010-2018, percentage of the population

Frequency/Year	2010	2011	2012	2013	2014	2015	2016	2017	2018
Every-day or almost	35	35	34	32	32	31	29	28	26
1-3 times a week	38	36	37	33	33	32	32	30	29
2-3 times a month or less often	15	17	16	19	18	18	18	21	20
Never	12	12	13	15	15	20	20	22	24
Do not know/never									

[Source: EuroBarometer]

Table 3. Written press readers by country, 2018, percentage of the population

Country/ Frequency	Every-day or almost	1-3 times a week	2-3 times a month or less often	Never
FI	59	25	11	5
SE	59	24	14	3
NL	54	21	12	11
DK	44	22	18	16
LU	41	31	13	15
AT	40	41	12	7
DE	40	27	18	14
BE	34	32	18	16
IE	32	24	16	18
EE	31	35	19	14
SI	28	33	23	16
UK	27	27	18	26

EU_28	26	29	20	24
HR	25	26	23	16
FR	23	26	17	33
MT	21	18	19	25
IT	20	37	31	20
PT	20	34	26	20
ES	19	28	17	25
LT	17	42	17	23
SK	16	30	29	23
HU	16	32	21	31
CZ	14	25	29	22
LV	14	34	25	26
CY	14	20	20	46
RO	9	25	24	39
PL	9	36	26	28
GR	7	22	34	37
BG	5	30	30	33

[Source: Elaboration on EuroBarometer data]

Tables 4 and 5 offer a confirmation of the most classical pattern, as reading newspapers is more common among educated, middle-aged people. Trust in press is also concentrated in the upper class, and very low in the working class - which gives the idea of the social fracture we usually refer to as polarization of contemporary world.

Table 4. Reading newspapers by socio-demographic variables, 2018, percentage of the population

Category/ Modality	Every-day or almost	2-3 times a week	Once a week	2-3 times a month	Less often	Never
EU_28	26	15	14	7	13	24
<i>Gender</i>						
Men	28	15	14	16	12	23
Women	24	15	14	7	14	25
<i>Age Group</i>						
Age 15-24	12	13	15	8	18	33
Age 25-39	19	16	15	9	16	24
Age 40-54	25	18	25	8	12	21
Age 55+	35	14	12	5	9	23
<i>Education</i>						
Low education	25	11	12	4	11	35
Middle education	23	16	14	7	13	25

High education	34	18	15	7	11	15
Still studying	13	14	16	11	19	27
<i>Occupation</i>						
Self-employed	30	19	12	7	15	17
Manager	37	19	13	6	10	14
Employees	23	18	8	9	13	18
Manual workers	20	15	16	7	14	26
House persons	12	16	13	7	17	33
Unemployed	17	13	12	8	14	35
Retired	36	13	12	4	8	25
Student	13	14	16	11	19	27
<i>Social class self-assessment</i>						
Working-class	19	14	14	6	12	33
Lower middle class	22	15	15	7	15	25
Middle class	30	16	14	7	12	20
Upper middle class	41	15	15	5	12	12
Upper class	38	12	9	15	7	19

[Source: Elaboration on EuroBarometer data]

Table 5. People trusting written press by socio-demographic variables, 2019, percentage of the population

Category/ Trust	Tend to trust	Tend not to trust	Do not know
EU_28	46	47	7
<i>Gender</i>			
Men	46	47	7
Women	46	48	6
<i>Age group</i>			
Age 15-24	47	44	9
Age 25-39	44	49	7
Age 40-54	47	48	5
Age 55+	47	46	7
<i>Education</i>			
Low education	38	53	9
Middle education	43	50	7

High education	53	42	5
Still studying	53	39	8
<i>Occupation</i>			
Self-employed	44	50	6
Manager	53	43	4
Employees	51	44	5
Manual workers	46	50	4
House persons	45	47	8
Unemployed	35	59	6
Retired	46	46	8
Student	53	39	8
<i>Social class self-assessment</i>			
Working-class	33	57	10
Lower middle class	44	51	5
Middle class	51	44	5
Upper middle class	70	36	4
Upper class	66	31	3

[Source: Elaboration on EuroBarometer data]

Table 6. People trusting written press by country, 2019

Country/ Level of trust	Tend to trust	Tend not to trust	Do not know
EU_28	46	47	7
RO	57	37	6
LV	48	41	11
CY	41	48	11
IE	51	43	6
DE	60	35	5
IT	51	45	4
FI	71	24	5
SK	53	40	7
LT	48	45	7
HU	44	49	7
GR	29	68	3
CZ	49	45	6
LU	63	27	10

BE	63	36	1
PL	41	44	15
FR	38	47	5
HR	39	58	3
BG	30	46	24
NL	73	25	2
PT	58	39	3
SI	38	58	4
ES	33	60	7
DK	59	35	6
AT	56	40	4
MT	28	46	26
EE	50	39	11
SE	62	34	4
UK	15	75	11

[Source: Elaboration on EuroBarometer data]

On the other hand, the use of alternative channels for getting news is a well-documented habit in all countries. In table 7, we collected data related to the relative relevance of different media typologies.

Table 7. Source of news in European countries, 2020; percentage of the population

Country	On line [all kinds]	TV	Print	Social media	For pay on-line news
AT	71%	68%	51%	45%	11%
BE	77%	63%	33%	41%	12%
BU	86%	77%	24%	71%	10%
CZ	88%	76%	24%	49%	10%
DE	70%	70%	33%	37%	10%
DK	80%	62%	21%	47%	17%
ES	79%	63%	34%	56%	12%
FI	88%	64%	37%	43%	19%
FR	66%	64%	15%	39%	10%
GR	92%	67%	24%	71%	11%
HR	88%	76%	36%	55%	7%
HU	84%	67%	15%	64%	10%
IE	80%	74%	32%	50%	12%
IT	74%	73%	22%	50%	10%
NL	77%	67%	33%	39%	14%

NO	88%	61%	25%	52%	42%
PO	87%	65%	24%	66%	20%
PT	80%	78%	33%	58%	10%
RO	83%	66%	15%	50%	16%
SE	84%	64%	28%	50%	27%
SK	79%	66%	22%	54%	12%
TR	85%	68%	42%	58%	NA
UK	77%	55%	22%	39%	7%

[Source: Reuters Reports on Digital Journalism]

The most impressive fact is that only in *one* country, Austria, print press is considered a main source by the majority of respondents. For what rather concerns the use of the web for getting news, three clusters can be easily identified:

- Low use [less than 75%]: Austria, Germany, France, Italy;
- Medium use [75-85%]: Belgium, Denmark, Spain, Hungary, Ireland, Netherlands, Portugal, Romania, Sweden, Slovakia, UK;
- Strong use [85%+]: Bulgaria, Czechia, Finland, Greece, Croatia, Norway, Poland, Turkey.

No geo-cultural pattern seems to emerge here, as the clusters manifest a similar internal variance for what concerns the importance of TV and that of social media – which, quite surprisingly, are not a more common source in the most digitized countries. What is pretty clear, in one way, is that for-pay on-line news define a very specific pattern. By and large, subscribers of those services range approximately from 5 to 10% of the overall audiences, with the Nordics providing most of the exceptions: 17% in Denmark; 19% in Finland; 27% in Sweden; 42% in Norway. Whilst Romania (16%) and Poland (20%) also show significant figures, there is a little space for for-pay contents in all countries belonging to the Mediterranean media system, historically characterized by a low degree of professionalization of journalism, predictably resulting in this kind of consumers behavior [see *Southern Europe Regional Report*].

A more advanced elaboration can allow us to split the category of *readers* into more specific sub-clusters, as in table 8. Aggregated data are related to nine cultural markets: Belgium, Croatia, Denmark, Germany, Hungary, Israel, Italy, Poland, and Portugal.

Table 8. Clusters of readers and non-readers in nine countries, minutes per day, 2015

Medium	Cluster			
Print newspapers	Light readers	Heavy print readers	Heavy Online readers	Non-readers

On-line newspapers	18,84	31,54	28,51	0
Digital news sites	19.29	32.63	132.89	0
Books	19.35	26.43	98.52	0
Digital books	14.74	162.83	17.94	0

[Source: Nossek, Adoni & Nimrod 2015]

As to the specific distribution, Germany and Denmark reveal a prevalence of non-readers; Belgium, of light readers; Croatia and Hungary that of heavy online readers; while in Israel, Italy and Portugal the distribution is very close to the sample average. When it comes to the breakdown by country, what is more interesting, table 9 provides a synthesis of the most successful typologies of newspapers.

Table 9. Success of different types of print newspapers, 2015 [percentage of national samples]

Type/ Country	BE	DE	DK	HR	HU	IT	PL	PT	Sample avg
National daily	51.8	37.3	34	65	18.9	49.5	45.6	47.3	45.6
Local daily	23.6	36	56.7	35.1	26.7	44.4	43.8	21.7	34.6
International daily	0.7	2.7	4.8	2.6	0.7	4.8	3.5	4.2	2.9
Weekly newspapers	21.8	28.3	13.9	12.3	9.2	24.8	62.3	28	25.6
Free newspapers	51	51	56.7	30	42	18.6	58.2	43.5	46.2
Magazines	60	36.8	52.5	49	39.2	46.5	25.8	42.5	42.5

[Source: Nossek, Adoni & Nimrod 2015]

We can see how national dailies are more popular in Croatia and Belgium, with Denmark, Germany and especially Hungary (18.9%) being above the sample average. On their part, international newspapers are not appreciated at all, with no relevant exceptions: and this is one with the lack of a proper European news coverage, which is commonly highlighted in political sciences [de Vreese, Peter & Semetko 2001; Machill, Beiller & Fischer 2006]. In any case, local dailies have a notable success in Denmark, Italy and Poland; magazines are more commonly read in Belgium, Denmark and Italy; and the free press in Denmark, Poland, and Belgium. As no clear pattern jumps out, this is one of those cases in which automated, wide-scale aggregate analysis is expected to deliver more relevant results.

Let us go back to the proportion among different news sources. In order to deal with a longitudinal analysis, we can refer to table 10, where similar data are shown – depending on their actual availability – for the time-span 2013-2017.

Table 10. Source of news in European countries, 2013-17: percentage of the population

Country	Year	On line [all kinds]	TV	Print	Social media	For pay on-line news
AT	2013	71%	78%	71%	38%	NA
BE	2016	82%	75%	45%	46%	NA
CZ	2015	91%	85%	37%	41%	NA
DE	2013	81%	85%	49%	31%	NA
ES	2013	79%	72%	61%	28%	NA
FI	2015	90%	75%	53%	40%	NA
FR	2013	68%	84%	46%	18%	NA
UK	2013	74%	79%	59%	20%	NA
DE	2013	66%	82%	63%	18%	NA
GR	2016	96%	66%	31%	74%	NA
HU	2016	88%	72%	27%	72%	NA
IE	2015	83%	76%	50%	49%	NA
IT	2013	80%	74%	59%	27%	NA
NL	2015	76%	80%	42%	43%	NA
NO	2013	86%	72%	41%	54%	NA
PO	2015	84%	81%	28%	52%	NA
PT	2015	86%	85%	47%	6%	NA
RO	2017	88%	84%	22%	65%	NA
SE	2016	89%	72%	43%	56%	NA
SK	2017	86%	79%	29%	58%	NA
TR	2015	88%	75%	50%	67%	NA

[Source: Elaboration on World Association of News Publishers and Reuters data]

The most evident fact is that the importance of newspapers has decreased in *any single* country – including Slovakia, where it was already very low (29% in 2017, and 22% in 2020). Interestingly enough, in this period only in three countries has the use of “online sources” for getting news increased, and very little: The Netherlands (+1%), Norway (+2%), and Poland (+3%). While there are no variations at all in Austria and Spain, percentages are even decreasing, to a different degree, in no less than thirteen countries: Belgium, Czechia, Germany, Finland, France, Hungary, Ireland, Italy, Portugal, Romania, Sweden, Slovakia, and Turkey. Scientific literature can furnish an explanation, as it is widely stated that news and other contents, currently, are not simply merged – as it was in the case of TV *infotainment* – while belonging to an emergent modality, we

can refer to as “networked publics” or “affective publics”. Upon this modality, news may well be shared and delivered, without people accessing official news sources – and with no perceived discontinuity among the moments of information, game, flirt or socialization [Boyd 2010; Papacharissi 2014].

The decrease in the general use of on-line news was naturally expected to be balanced by a huge increase in the adoption of social media. As a matter of fact, this increase is overall visible, and it is quite striking in the case of Italy or Spain, where the percentage has almost doubled, and even more in Portugal, which has moved from 6 to 58% of the total. This being said, the growth of social media as spaces for information appears to be less strong than expected, and their use has paradoxically declined in Belgium, Greece, Hungary, Netherlands, Norway, Romania, Sweden, Slovakia, and Turkey. Once again, no geographical pattern would pop up, those countries being separated by huge differences in terms of historical legacy, institutional arrangements, and media systems organization too. It is possible, so, that the diffusion of social media has reached its saturation point, and that the spread of new platforms and services, as a consequence, would not suffice to counterbalance the decline of other news services. This hypothesis will be put to the test in the upcoming work-packages, also for the purposes of sketching operational recommendations for the stake-holders: as a matter of fact, the possible saturation of people’s attention can make an all-digital engagement strategy fail, if not backfire.

Even though the power of NewsFeed is a widely accepted argument, also in this case we can notice how the importance of Facebook for collecting news has started to decline – at least in quantitative terms – between 2017 and 2018, as shown in the table below.

Table 11. Facebook for news in selected European countries 2016-2021, percentage of the population

Country/Year	2016	2017	2018	2019	2020	2021
AT	35%	34%	30%	31%	30%	31%
DE	27%	25%	24%	22%	22%	18%
ES	49%	47%	48%	47%	44%	39%
FR	42%	43%	41%	46%	43%	39%
IT	54%	51%	51%	54%	56%	50%
UK	28%	29%	24%	23%	24%	23%

[Source: Statista]

What disaggregated data may suggest, here, is that a gender imbalance comes to play, with male users being less keen to use Facebook for information purposes [table 12] – and the more significantly in Ireland (-26%), Italy (-26%) and Denmark (-18%).

Table 12. News in social media by gender in selected European countries, 2019

Country	Male	Female
DE	45%	55%
DK	41%	59%
ES	42%	58%
FI	44%	56%
FR	46%	54%
IE	37%	63%
IT	37%	63%
UK	44%	56%

[Source: Reuters Reports on Digital Journalism]

Small-scale, in-depth research does provide a confirmation of these tendencies, with male Facebook users being less interested in news and political topics [Thorson & others 2019]. This is the more interesting, when one considers that the gender imbalance in news consumption used to work the other way around. According to the most recent data we retrieved, for instance, in Germany the percentage of readers in 2020 is 71,7% among the male and 69,4% among the female population; and in Italy, in a similar way, in 2021 there are 7,729,000 male readers, compared to 4,839,000 female readers. Generally speaking, the web itself is still more diffused among men than it is among women, as in table 13. Whilst the web and the press are more diffused among men, though, for some reason the ultimate combination between the two – the use of social media for getting news – is more frequent among women. In such cases, qualitative research is expected to offer the best tools for the understanding of everyday-life patterns.

Table 13. Gender differences in the Web diffusion in selected countries, 2018-2020

Country	Year	Total	Male	Female
DE	2019	88.1%	91.1%	85.3%
DK	2020	96.5%	97.4%	95.7%
ES	2019	90.7%	90.7%	90.7%
FI	2019	89.6%	90.3%	88.9%
FR	2019	83.3%	84.6%	82.2%
IE	2018	84.5%	83.3%	85.7%
IT	2018	74.4%	77.1%	71.8%
UK	2020	94.8%	95.2%	94.4%

[Source: International Telecommunications Union]

A final aspect related to the media diet of the Europeans has to do with the expected crisis – or rather the resilience - of the TV in the age of interconnected media [table 14]. As a matter of fact,

the relevance of TV as news source has increased only in Greece (+1%), but its decline has been relatively modest in Italy (-1%), Portugal (-3%) and Turkey (-7%), in this case confirming the everlasting centrality of the medium in the Southern or Polarized Pluralist media system [Papathanassopoulos & Negrine 2012, 113-118]. For Italy and Greece, importance of TV is also confirmed by people's self-assessment, as resulted from a comparative analysis performed in eleven countries [Papathanassopoulos & others 2013, 697].

Table 14. Relevance of TV news, 2013-2020

Country	+/-
AT	-10%
BE	-12%
CZ	-9%
DE	-15%
ES	-9%
FI	-11%
FR	-20%
GR	+1%
HU	-5%
IE	-2%
IT	-1%
NL	-13%
NO	-11%
PO	-16%
PT	-3%
RO	-18%
SE	-8%
SK	-13%
TR	-7%

[Source: Reuters Reports on Digital Journalism]

It would be improper to analyze the relationship between the Europeans and their news sources, finally, without recalling a main issue in contemporary journalism studies – people's opinion about the trustworthiness of the media.

Table 15. People trusting “most news most of the time”, 2020

Country	Percentage
Finland	56%
Portugal	56%

Turkey	55%
Netherlands	52%
Ireland	48%
Denmark	46%
Germany	45%
Norway	45%
Poland	45%
Belgium	45%
Switzerland	44%
Austria	40%
Croatia	39%
Spain	36%
Czechia	33%
Italy	29%
Greece	28%
Slovakia	28%
UK	28%
Hungary	27%
France	23%

[Source: Reuters Institute for the Study of Journalism]

Here we have a very clear and conventional pattern: trust in news media is high in Central and Northern European countries – Germany, Netherlands, Sweden, and to a lower extent in Denmark – whilst it is very low in the Mediterranean area (Italy, France, Spain), and in the UK as well. What is more compelling, the comparison with table 10 reveals how distrust in news media is not always matched by a wide use of social media for getting news – this form of compensation is visible in Greece and Hungary, partially so in Czechia, and not visible at all in four of the five main European markets - Italy, Spain, France and UK.

At the generational level, table 16 proposes the results of a wide inquiry realized worldwide by the Pew Research Center – and specifically, the share of people significantly trusting news media, sorted out by age group. In this case too, the pattern is pretty clear, with the gap between oldest and youngest simply decreasing in countries where the overall level of trust is already low. What we have to keep in mind, here, is that distrust in news media goes hand in hand with distrust in other forms of mediation, and political actors and institutions, thus putting at risk the stability of EU [Castells 2012a; 2012b]. Reflections on Europeanization, in this perspective, require the understanding of both cultural forms and technical platforms, by means of which people define their identity.

Table 16. Trust in news media by age class, 2018: percentage of “a lot or somewhat” answers

Country/Age Class	18-29	30-49	50+	Oldest/Youngest gap
Germany	54%	63%	68%	+14
Netherlands	59%	72%	72%	+13
Sweden	57%	64%	68%	+11
Denmark	41%	49%	49%	+8
Spain	26%	34%	34%	+8
UK	28%	31%	31%	+3
Italy	28%	28%	28%	0
France	37%	34%	34%	-3

[Source: Pew Internet Research Center]

Table 17. People trusting and not trusting media, 2021, percentage of the population

Country/Level of trust	Tend to trust	Tend not to trust	Don't know
EU_27	41	56	3
EURO Area	40	57	3
AT	49	46	5
BE	47	53	0
BG	39	51	10
CY	28	70	2
CZ	49	49	2
DK	57	40	3
EE	52	48	0
ES	31	66	3
FI	75	25	0
FR	26	71	3
GR	18	81	1
HR	28	68	4
HU	34	65	1
IE	53	47	0
IT	40	56	4
LT	40	60	0
LV	40	60	0
MT	25	68	7
NL	59	40	1
PL	42	53	5

PT	62	36	2
RO	44	52	4
SE	53	47	0
SI	37	62	1
SK	36	61	3

[Source: EuroBarometer]

In a similar vein, data in table 17 picture a dramatic situation, with Europe literally splitting into two different parts. On the one hand, we have the Protestant North, with its strong tradition of literacy and independent journalism – on the other hand, we have the South and the East, where a significant majority of people does not trust the media. Geographically speaking, there are only two exceptions: Portugal in the South, with 62% of respondents trusting their media, and Belgium in the North, as a possible consequence of some well-known national scandals. The importance of this divide can hardly be overestimated, as all data related to people’s behavior and media consumption must be read in light of this difference.

Tables 18 and 19 provide more analytical insights into the information diet of the Europeans, when it comes to news related to the EU itself.

Table 18. Getting news about the European Union by age group, 2020 [more answers possible]

Source/Age Group	15-24	25-39	40-54	55+
TV	34%	40%	48%	55%
Internet total	62%	58%	48%	25%
Information websites	35%	34%	29%	15%
Institutional websites	27%	24%	21%	11%
SNS	28%	21%	14%	6%
Daily newspapers	11%	17%	22%	27%
Radio	22%	17%	22%	24%
In-person discussion	19%	22%	21%	18%
Never look	18%	18%	17%	23%

[Source: Euro Barometer]

Table 19. Getting news about the European Union by country, winter 2020-2021 [first source of news]

Country	TV	Press	Radio	Web	Social Media
AT	45%	16%	8%	15%	11%
BE	41%	27%	11%	15%	6%
BG	67%	1%	1%	16%	9%
CY	49%	1%	4%	27%	13%
CZ	37%	4%	5%	51%	3%
DE	50%	12%	9%	20%	8%
DK	48%	16%	9%	20%	6%
EE	35%	9%	8%	43%	5%
ES	51%	6%	5%	26%	3%
FI	42%	21%	4%	30%	3%
FR	48%	11%	12%	17%	4%
GR	41%	3%	4%	39%	13%
HR	56%	3%	3%	29%	8%
HU	48%	2%	3%	38%	7%
IE	33%	18%	13%	24%	12%
LT	44%	6%	6%	37%	7%
LU	25%	27%	14%	24%	10%
LV	38%	2%	8%	41%	11%
MT	38%	10%	3%	23%	24%
NL	38%	25%	4%	28%	5%
PL	53%	3%	5%	32%	6%
PT	60%	9%	3%	23%	5%
SE	42%	17%	13%	21%	7%
SK	49%	3%	6%	26%	15%
EU27	52%	9%	6%	23%	6%
EU28-UK	52%	9%	6%	23%	6%

[Source: Euro Barometer]

Data can't be properly compared, due to their different metrics, but they do suggest something relevant. With the exception of Czechia, Latvia and Estonia, TV is everywhere the most cited information source, with no differences between highly digitalized countries and laggards. As cautious as we need to be with any generalization, we can assume this as a confirmation of the lack of *active* research of information about the EU – so that this sub-topic is normally delivered, as a consequence, by the most traditional one-to-many medium. This is not totally surprising, as wide-scale survey show that interest in EU peaks, in any country, when European issues overlap local issues, with little or no space for the horizontal dialogue among nations [i.e., Sift and others 2007, 143]. It would likely follow that these moments – summits; financial negotiations; debt crises – are

more intensely covered by national broadcasting, also resulting in the data shown in the above tables [Peters & de Vreese 2004; Barisione & Ceron 2017]. Lack of interest for the institutional existence of EU as such has been already documented, as a matter of fact, also in different scientific fields [Rose 2015, 3].

By drawing on table 20, we can better visualize the specific pattern related to news about the EU. As one can see, the more active and aware solutions – web news, and institutional websites – are specific to what we use to consider the *elite*: upper class, college students, well-educated citizens. On the other hand, TV is largely the dominant medium among old and low-educated people, and for the working class as well. The separation between the two approaches, in other words, perfectly overlays the distinction between local and global; *flows* and *spaces* [Ruggie 1993, 172; and after that, Castells 1996]; pro and anti-European tendencies, in such a way to make media patterns a fundamental standpoint, for understanding the overall stability of the system.

Table 20. Getting news about EU by socio-demographic variables, 2019, percentage of the population

Category/ Channel	TV	Web total	Web news	Institutional websites	SSN	Newspapers	Radio	Discussions	Never look
EU_28	47	43	26	18	14	21	21	20	20
<i>Gender</i>									
Men	47	46	29	19	15	23	22	19	18
Women	47	40	22	17	14	19	19	22	22
<i>Age group</i>									
Age 15-24	34	62	35	27	28	11	12	24	20
Age 25-39	40	58	34	24	21	17	17	22	18
Age 40-54	48	48	29	21	14	22	22	21	17
Age 55+	55	25	15	11	6	27	24	18	23
<i>Education</i>									
Low education	51	14	7	5	5	18	18	14	33
Middle education	51	38	21	13	14	20	20	20	22
High education	45	58	38	28	15	28	25	23	12
Still studying	29	65	38	34	27	11	12	26	16
<i>Occupation</i>									
Self- employed	45	56	33	22	17	25	23	19	15
Manager	41	64	40	35	17	21	26	27	10

Employees	49	55	34	23	17	21	21	22	15
Manual workers	48	42	24	14	17	17	20	19	22
House persons	53	31	16	12	10	12	14	21	26
Unemployed	39	43	26	13	17	13	14	19	29
Retired	56	20	12	9	4	27	24	17	25
Student	29	65	38	34	27	11	12	26	16
<i>Social class self-assessment</i>									
Working-class	44	29	16	9	12	14	17	16	32
Lower middle class	49	42	25	17	14	20	20	21	18
Middle class	49	49	29	22	16	25	23	22	15
Upper middle class	49	62	42	32	13	35	25	28	6
Upper class	53	68	41	37	19	32	28	24	7

[Source: Elaboration on EuroBarometer data]

Table 21. Finland: printed media as the main source, 2021

Class Age	Percentage
18-24	5%
25-34	5%
35-44	5%
45-54	6%
55-64	7%
65+	10%

[Source: Statista]

Table 22. The Netherlands: newspapers subscribers, 2018

Class Age	Percentage
25-	30%
25-45	25%
46-65	31%
65+	65%

[Source: Statista]

(2.2) Reading newspapers by gender

Disaggregation by gender, where available [tables 23-36], shows some nuances, which might deserve a deeper analysis. All in all, we have a clear prevalence of male press readers in Italy and France; a slight prevalence of them in Denmark and Spain; whereas women outnumber men in Poland, Sweden, Finland and Norway. Data about the Netherlands are somehow inconsistent, as according to Statista the 2020 daily reach is 36.7% among men and 33.4% among women, while in the paper/digital breakdown female readers are more familiar with both digital and paper, and conversely it is more common for men to use *both* sources [table 28].

Table 23. Number of readers by gender in Italy, 2021, absolute values

Male readers [in 1,000]	Female readers [in 1,000]
7,729	4,839

[Source: Doxa]

Table 24. Female readers in Italy, 2019, by age group, absolute values [in thousands]

Age group/Frequency	At least once a week	5 or 5+ times a week
6-24	820	134
25-44	2,237	514
45-64	3,344	1,021
65+	2,711	981

[Source: ISTAT]

Table 25. Male readers in Italy, 2019, by age group, absolute values [in thousands]

Age group/Frequency	At least once a week	5 or 5+ times a week
6-24	856	195
25-44	2,785	747
45-64	4,243	1,552
65+	3,241	1,545

[Source: ISTAT]

Table 26. Share of readers in Spain, by gender, 2016, share of respondents

Type/Gender	M	F
TV News	75%	80.5%

On-line newspapers	48.3%	36.7%
News radio	43.7%	33.9%
News links on social networks	32.6%	38%
Print newspapers	28.7%	25.9%

[Source: Statista]

Table 27. Share of people using different media in Spain, by gender, 2020, share of respondents

Type/Gender	M	F
Daily newspapers	17.6%	12.1%
Newspapers supplements	4.5%	5.6%
Magazines	18.3%	25%
Radio	58.4%	51%
TV	83%	85.3%
Outdoor advertisings	77.7%	74.5%
Cinema	1.3%	1.1%
Internet	84%	81.5%

[Source: Statista]

Table 28. Print and online press in the Netherlands by gender, 2019

Type/Gender	M	F	Total
Only digital	21%	27%	24%
Paper and digital	48%	38%	43%
Only paper	11%	13%	12%

[Source: Statista]

Table 29. Reading of online newspapers by gender in France, 2017

Frequency/Gender	F	M
Every-day	18%	31%
Several times a week	21%	25%
Once a week	8%	6%
Several times a month	9%	7%
Once a month	5%	4%
Less than once a month	9%	7%
Never	30%	20%

[Source: World Association of News Publishers]

Table 30. Information sources in Poland by gender, 2021

Source/Gender	F	M
Web	66.8%	67.2%
Main TV programs [average share of the six main programs]	33.5%	31.9%
Radio	31.7%	27.1%
Social media	33.6%	26.1%
Weekly press	15.8%	9.7%
Daily press	15.9%	8.5%

[Source: Elaboration on Statista data]

Table 31. Information sources in Finland by gender, 2021

Source/Gender	F	M
Tv news	41%	55%
Local newspapers	14%	10%
Newspapers [three main national papers]	14%	12%
Public Radio	6%	8%
Free newspapers	4%	3%
Commercial radio	3%	4%

[Source: Elaboration on Reuters Institute data]

Table 32. Share of daily newspapers subscribers in Sweden by gender, 2009-2020

Year/Gender	Share among male readers	Share among female readers
2009	64%	67%
2010	61%	67%
2011	60%	63%
2012	57%	61%
2013	54%	59%
2014	53%	56%
2015	51%	54%
2016	54%	55%
2017	48%	50%
2018	47%	53%
2019	45%	47%

[Source: Nordicom]

Table 33. Reading on-line newspapers in Sweden by gender, 2020, frequency

Frequency/Gender	M	F
Several times a day	9%	7%
Sometimes	19%	21%
Once/several times a month	5%	5%
Daily	34%	30%
Never	18%	21%
Once/several times a week	15%	16%

[Source: Statista]

Table 34. To what extent people use newspapers in Denmark by gender, 2016

Extent/Gender	M	F
Very large extent	14.6%	12.2%
Quite large extent	17%	13.1%
Neither/nor	19.6%	16.5%
Quite little extent	13%	14.5%
Very little extent	31.7%	38.5%
Don't know	4.2%	5.2%

[Source: Statista]

Table 35. Relevance of news sources in Denmark by gender, 2016, share of respondents

Source/Gender	M	F
TV	40.2%	43.2%
Social media	7.9%	14.9%
Digital news sources	19.5%	12.7%
Radio	11%	11.4%
Daily newspapers	12%	8.3%
Weekly newspapers	1.8%	1.9%
Weeklies	0.8%	0.6%

[Source: Statista]

Table 36. Printed newspapers subscribers in Norway by gender, 2009-2020, share of individuals

Year/Gender	M	F
2009	68%	72%
2010	65%	72%
2011	65%	71%
2012	60%	65%
2013	57%	60%
2014	49%	58%

2015	48%	52%
2016	39%	49%
2017	40%	44%
2018	37%	40%
2019	33%	38%
2020	33%	33%

[Source: Statista]

(2.3) Reading newspaper by age

More detailed analyses of reading habits are also available, even though datasets are not always compatible with each other. Breakdown data by age group, in particular, are very patchy, but they seem to unravel quite variable patterns. By referring to Statista datasets, we can see that in Germany strong readers are mostly in the 30-49 age class (84%), with youth (82,4%) being surprisingly more informed than the 50+ year cluster (60,7%). A clear prevalence of oldest generations is evident in Italy, where people aged 55-74 read more frequently than the others; and in Sweden, where the 65-85 and the 45-64 age classes respectively show a 78% and a 67% of strong readers, with the percentage decreasing amongst young people (47% between 15 and 24 years old; 24% between 9 and 14 years old). Similar conclusions can be inferred from Dutch, Danish and Finnish statistics, which are in any case based on different metrics. In Denmark, data are about people which used “printed newspapers as a main source in the last two weeks” in 2019; in Finland, about people considering “newspapers and magazines as the main source” in 2021; in the Netherlands, finally, data are obtained by counting the official subscriptions [tables 37-55]. In any case, a generational gap seems to be confirmed, albeit with different proportions and metrics, in the diffusion of the press.

For what concerns *paper* press reading, two slightly different tendencies emerge: a prevalence in the 50-60 group age; or a prevalence among the over 60. In the first cluster we have Italy, with readers concentrated in the age group 45-64, followed by the 25-44; Germany, with the 50-59 group; Ireland and Denmark, with the 55+ age group; and France, with respectively 50+ and 35-49 (and young people commonly saying they *should* pay more attention to news, as in table 39). Press readers are more mature in Norway, with a prevalence among the 67-79 years-old; in Sweden, among the aged 65-85; in Spain, among the 65-74, followed by the 55-64 class; in UK and Netherlands, among the aged 65+. We have to notice that in the last two cases reading habits are calculated in terms of expenditures, and therefore the weight of oldest people may be overestimated. In Netherlands, though, people over 65 are also more keen to blended consumption, as they use the digital/paper combination more often than the youngster.

When available, data about use of on-line newspapers predictably privilege younger generations: 18-34 years old in Netherlands; 25-44 in Poland; 25-34 in Ireland. The only exception is Sweden, with a prevalence in the 65-85 age class; but also in this case, statistics are based on expenditure. Not surprisingly, on-line news services are used by young adults *more than teens and youngsters*, which in all likelihood prefer different sources, and namely social media. As the proper, intentional use of social media for getting news is not increasing in all countries, though, we probably face a qualitative transformation in the media diet. Far from simply replacing a news source with another – paper with on-line newspapers; traditional with digital media outlets - young readers seem to consider *news* as a part of a broader set of both public and private contents, all spreading across the same platforms. Here mainstream explanations fall short, as – after the decline of the pointless category of digital divide - they rather focus on the “naivete” of youngsters [Hargittai 2010] and their lack of awareness, or on the alleged cultural passivity of last generations [Turkle 2011; Twenge 2017]. While the category of digital native was doubtless flawed, the alternative thesis still requires solid confirmation; and understanding the *qualitative* relation between young Europeans and the news is the more urgent, also for the definition of effective strategies of literacy and engagement.

Table 37. Newspapers readers by age in Italy, 2020, absolute values

Age group/Frequency	At least once a week	5+ times a week
6-24	1,451	268
25-44	4,409	1,003
45-64	6,918	2,090
65+	5,751	2,293

[Source: ISTAT]

Table 38. How often people read newspapers in France by age group, 2018, share of respondents

Frequency/Age Group	18-24	25-34	35-49	50+
At least once a week	59%	59%	64%	69%
At least once a month	29%	18%	14%	12%
6-8 times per year	5%	9%	9%	5%
Less often	7%	15%	14%	12%

[Source: Statista]

Table 39. People stating they don't devote enough time to printed in press in France by age, 2016

Age group	Share of respondents
12-17	58%
18-24	52%

25-39	55%
40-59	57%
60-69	28%
70+	19%

[Source: Statista]

Table 40. People reading daily newspapers in Spain by age, 2018-2019

Age group	2020	2021
14-19	7.8%	7.1%
20-24	10%	8.7%
25-34	12.1%	10.1%
35-44	14.1%	12.4%
45-54	16.3%	15.1%
55-64	17.8%	17.3%
65-74	NA	18.8%
65+	16.7%	NA
75+	NA	13.9%

[Source: Statista]

Table 41. Users of paid newspapers by age in Germany, 2014

Age group	Share of respondents
14-19	6.9%
20-29	19.2%
30-39	18.2%
40-49	18.7%
50-59	24.5%
60-69	10.1%
70+	2.4%

[Source: Elaboration on Statista Data]

Table 42. Average expenditure for newspapers in UK by age of household reference person, 2019

Class Age	Average expenditure in GBP
30-	0
30-49	0.4
50-64	1
65-74	3.1
75+	3.5
All	1.4

[Source: UK Office for National Statistics]

Table 43. Most important platforms for news in UK by age group, share of respondents

Platform/Age Group	16-24	24+
TV	61%	93%
Internet with any device	89%	50%
Radio	29%	50%
Print newspapers	16%	50%

[Source: Statista]

Table 44. Newspaper diffusion in the Netherlands by age, 2021

Age Class	Share
13-19	21%
20-34	19.3%
35-49	22.3%
50-64	37.8%
65+	64%
Total	34.3%

[Source: Statista]

Table 45. Distribution of newspaper readers in the Netherlands by age, 2021

Age Class	Percentage
13-19	5.9%
20-34	12.4%
35-49	14.5%
50-64	26.8%
65+	40.4%

[Source: Statista]

Table 46. Share of online and print newspapers in the Netherlands by age, 2019

Age groups/Source	Paper only	Paper and digital	Digital only
13-17	6%	31%	26%
18-34	7%	31%	32%
35-49	23%	44%	23%
50-64	15%	45%	24%
65+	18%	56%	15%

[Source: Statista]

Table 47. News sources in Poland by age group, 2021, share

Age groups/Source	Radio	Daily newspapers	Weekly magazines
18-29	23.2%	6.3%	12.8%
18-34	25.9%	10.5%	9.8%
40-49	32.5%	15.2%	7.1%
50-59	29%	15.4%	2.1%
60-69	26.4%	14%	25.7%
70+	49.9%	31.2%	37.7%

[Source: Statista]

Table 48. News platforms in Poland by age group, 2017, share

Age groups/Source	Paper, dailies and magazines	Digital	Equally often on paper and digital	Video or audio	Rarely follow the news
15-24	12%	24%	9%	46%	9%
25-44	4	43	10	26	17
45-59	15	21	9	49	7
60+	29	6	6	59	8
Total	12	24	9	46	9

[Source: Statista]

Table 49. Digital and traditional access to news in Ireland by age group, 2016, share of respondents

Age group	Digitalist	Traditionalist
18-24	23%	8%
25-34	30%	14%
35-44	21%	16%
45-54	12%	21%
55+	14%	40%

[Source: Statista]

Table 50. Denmark: printed newspapers as the main source by age, 2019

Age Class	Percentage
18-24	10%
25-34	8%
35-44	15%
45-54	19%
55+	33%

[Source: Statista]

Table 51. Time spent “reading newspapers yesterday” in Denmark by age, 2016-2018, in minutes

Age group	2016	2018
12-18	6	3
19-34	6	4
35-54	9	8
55-70	23	20
71+	41	37
Total	15	13

[Source: Statista]

Table 52. Finland: printed newspapers as the main source by age class, 2021

Age Class	Percentage
18-24	5%
25-34	5%
35-44	5%
45-54	6%
55-64	7%
65+	10%

[Source: Statista]

Table 53. Share of individuals who read daily newspaper in Norway by age, 2020

Age Class	Share
9-12	8%
13-15	11%
16-19	5%
20-24	9%
25-34	10%
35-44	18%
45-54	25%
55-66	42%
67-79	61%

[Source: Statista]

Table 54. Average household expenditure for digital and press newspapers in Sweden by age, 2017

Age Group	Press Expenditures in SEK	Digital Expenditures in SEK
25-34	160	373

35-45	183	813
46-54	222	1,285
55-64	221	1,974
65-85	306	3,279
Total	210	1,514

[Source: Nordicom]

Table 55. Share of individuals reading daily newspapers in Sweden by age group, 2020

Age Group	Share of respondents
9-14	24%
15-24	47%
25-44	67%
45-64	78%
65-85	84%

[Source: Nordicom]

(3) Patterns in radio consumption

(3.1) European trends

As we know, radio has a legendary part in all media histories, due to its ability to survive endless crises and become, so to speak, the *light cavalry* of mass communication armies. As already accounted for in the WP1 reports, radio is still the most trusted medium [tables 56 and 57], even though this would not translate in a real hegemony in everyday consumption practices.

Table 56. Most trusted media in Europe, 2019

Medium	%
Radio	57%
TV	49%
Printed press	46%
Web	32%
Social media	20%

[Source: European Commission]

Table 57. Trust in radio by country, 2019, percentage of the population

Country/Level of trust	Trusting	Not trusting	Net trust

Sweden	80%	16%	64%
Finland	78%	14%	64%
Denmark	78%	16%	62%
Netherlands	77%	60%	17%
Belgium	73%	26%	47%
Austria	68%	28%	40%
Luxembourg	68%	24%	44%
Portugal	67%	29%	38%
Latvia	65%	23%	42%
Slovakia	64%	32%	32%
Lithuania	62%	30%	32%
Estonia	62%	30%	21%
Czech Republic	62%	33%	29%
Romania	61%	34%	27%
Italy	55%	38%	17%
Poland	54%	35%	19%
Slovenia	52%	44%	8%
Cyprus	52%	41%	11%
Bulgaria	51%	30%	21%
Croatia	50%	48%	2%
France	50%	43%	7%
Malta	46%	36%	10%
Hungary	46%	49%	-3%
UK	44%	43%	1%
Spain	44%	48%	-4%
Turkey	36%	61%	-25%
EU_28	57%	36%	21%

[Source: Statista]

We have here a very few exceptions: Spain and Hungary within the EU, and overall UK and especially Turkey, where a large majority of respondents does not trust radio – for reasons that could be investigated later on in the project. As paradoxical as it may seem, the most trusted medium is by no means the most used: it is rather the *less* used in Denmark, Spain, France, Italy, Sweden, and the third most used in the other considered countries. With this respect, the above-cited legendary *resilience* of the radio [i.e., Kleinsteuber 2011] might require a closer qualitative analysis, as it may well be the simple reproduction of a cultural habitus, rather than the proof of its actual social impact.

As we can see in table 58, trust in radio is diffused among the upper class (78%), the middle-upper class (75%), students (62%), and well-educated people (62%). As a matter of fact, the

distribution of radio usage [table 61] does not match these clusters, with some categories *trusting more than they listen* (students, retired and highly-educated people), and others *listening more than they trust* (middle-aged). This might be a manifestation of the habit: or, following Bourdieu [1972], the embodiment of cultural capital, superimposing cultural dispositions and taste orientation.

Table 58. People trusting to radio by socio-demographic variables, 2019, percentage of the population

Category/ Trust	Tend to trust	Tend not to trust	Do not know
EU_28	57	36	7
<i>Gender</i>			
Men	57	36	7
Women	57	35	8
<i>Age group</i>			
Age 15-24	67	24	9
Age 25-39	55	38	7
Age 40-54	58	37	5
Age 55+	58	33	9
<i>Education</i>			
Low education	49	41	10
Middle education	55	38	5
High education	62	32	6
Still studying	62	30	8
<i>Occupation</i>			
Self-employed	56	38	6
Manager	65	30	5
Employees	61	34	5
Manual workers	54	40	6
House persons	56	36	8
Unemployed	45	47	8
Retired	57	33	10
Student	62	30	8
Working-class	48	42	10
Lower middle class	54	39	7
<i>Social class self-assessment</i>			
Middle class	61	33	6

Upper middle class	75	20	5
Upper class	78	20	2

[Source: Elaboration on EuroBarometer data]

Table 59. Daily time spent using media in Europe, 2021 [hours and minutes]

	Web [with any device]	Tv [all kinds]	Press [paper and on-line]	Broadcast Radio
AT	5h46'	2h42'	1h08'	1h32'
BE	5h16'	3h04'	1h12'	1h41'
DE	5h26'	3h12'	1h14'	1h31'
DK	5h16'	3h04'	1h39'	1h11'
ES	6h11'	3h22'	1h19'	1h04'
FR	5h37'	3h27'	1h06'	1h01'
IE	6 h30'	3h21'	1h06'	1h11'
IT	6h22'	3h18'	1h21'	1h14'
NL	5h28'	3h05'	1h08'	1h49'
PL	6h44'	3h16'	1h16'	1h51'
PT	7h20'	2h56'	0h58'	1h17'
RO	7h26'	3h20'	1h22'	1h23'
SE	6h15'	3h02'	1h23'	1h13'
TR	7h57'	3h13'	1h33'	0h39'
UK	6h26'	4h01'	1h07'	1h12'

[Source: Elaboration on Statista and Data Reportal data]

Table 60. Europeans listening to the radio, 2018, percentage of the population

Country/ Frequency	Every-day or almost	1-3 times a week	2-3 times a month or less often	Never	No access/ No answers
SI	66	20	10	4	0
IE	65	21	6	7	1
LU	63	20	9	7	1
SK	62	25	6	7	0
BE	61	22	10	7	0
DK	60	26	10	4	0
DE	59	18	11	10	2
AT	58	29	8	5	0
EE	57	21	13	9	0

NL	55	28	10	7	0
CY	55	22	12	11	0
SE	55	23	16	6	2
HR	55	26	17	6	1
MT	55	22	11	11	1
LV	53	20	10	16	1
FI	52	23	14	11	0
FR	51	17	9	22	1
UK	51	24	10	14	1
EU_28	47	27	10	15	1
PT	46	25	11	18	0
LT	44	31	7	17	1
CZ	43	37	12	8	0
PL	40	38	7	14	1
HU	39	35	9	17	0
ES	34	26	14	26	0
GR	33	39	16	12	0
IT	32	38	17	16	1
BG	30	37	14	16	3
RO	27	31	9	29	1

[Source: EuroBarometer]

Table 61. Listening to radio by socio-demographic variables, 2018, percentage of the population

Category/ Modality	Every-day or almost	2-3 times a week	Once a week	2-3 times a month	Less often	Never
EU_28	47	18	9	3	7	15
<i>Gender</i>						
Men	49	18	9	4	7	12
Women	45	18	8	3	8	13
<i>Age Group</i>						
Age 15-24	29	20	12	4	12	21
Age 25-39	44	20	11	4	8	13
Age 40-54	56	18	8	3	5	10
Age 55+	48	16	6	3	6	19
<i>Education</i>						
Low education	38	16	7	3	8	26
Middle education	49	18	8	3	7	14
High education	54	18	8	4	6	10

Still studying	26	21	15	5	14	19
<i>Occupation</i>						
Self-employed	56	18	9	3	7	7
Manager	62	15	8	2	6	6
Employees	53	19	19	4	5	8
Manual workers	47	21	8	3	7	13
House persons	32	19	9	4	10	25
Unemployed	35	18	9	4	10	24
Retired	46	16	6	3	6	21
Student	26	21	15	5	14	19
<i>Social class self-assessment</i>						
Working-class	40	18	8	3	8	22
Lower middle class	26	17	8	3	8	15
Middle class	50	18	9	3	7	12
Upper middle class	57	14	9	5	7	8
Upper class	51	17	11	3	7	9

[Source: Elaboration on EuroBarometer data]

Table 62. How often Europeans listen to radio, 2015-2019, percentage of the population 15+

Frequency/Percentage	2015	2019
Every day or almost	65%	47%
1-3 times a week	NA	27%
2-3 times a week	14%	NA
Once a week	7%	NA
2-3 times per month	2%	10%
Never	NA	15%

[Source: Elaboration on EuroBarometer and European Commission data]

Table 63. Daily listening time in Western Europe, 2011-2021, minutes per day

Year	Minutes per day
2011	127.1
2012	127.1
2013	123.5
2014	119
2015	119.9
2016	117.9

2017	117.4
2018	115.8
2019	114.3
2020	111.9
2021	110.1

[Source: Statista]

Table 64. People listening to radio “every day or almost” by country, 2019

Country	Percentage of the population
AT	58%
BE	61%
BU	30%
CZ	43%
DE	59%
DK	60%
EE	57%
ES	34%
FI	52%
FR	51%
GR	33%
HR	55%
HU	39%
IE	65%
IT	32%
LT	44%
LU	63%
MT	55%
NL	55%
PO	40%
PT	46%
RO	27%
SK	62%
SL	66%
UK	51%
EU_28	47%

[Source: European Commission]

Historical trends reveal a moderate but constant decrease in radio use, though data metrics are not always compatible with each other [table 62]. On the other hand, synchronic observation

reveals very different data, ranging from a 27% of daily listeners in Romania, to a 65% in Ireland. In the case of Spain and Hungary, the rarity of heavy listeners is matched by a general low trust in the medium [table 60].

Table 65. Clusters of countries by relevance of radio listening, 2020-2021

Percentage of people consuming radio every day	Countries
Over 60% of the population	Ireland, Luxemburg, Slovakia, Slovenia, Belgium, Denmark
Between 50 and 59% of the population	Germany, Austria, Estonia, The Netherlands, Cyprus, Hungary, Malta
Between 40 and 49% of the population	Czechia, Lithuania, Poland, Portugal
Less than 40%	Bulgaria, Spain, Greece, Hungary, Italy

[Source: Elaboration on European Broadcasting Union data]

Table 66. Share of daily radio consumers in the EU, 2011-2019, age 15+

Year	Percentage
2011	51%
2012	53%
2013	50%
2014	53%
2015	50%
2016	47%
2017	50%
2018	46%
2019	47%

[Source: European Commission]

The basic gender breakdown proposed by EuroBarometer documents a majority of male listeners, as synthetized in table 67.

Table 67. How often Europeans listen to radio by gender, 2020, percentage of the population

Frequency/Gender	M	F
Once a week+	76%	71%
Every-day or almost	49%	45%
Once a week	9%	8%
2-3 times a week	18%	18%

2-3 times per month	4%	3%
Rarely	7%	8%
Never	13%	17%

[Source: EuroBarometer]

Market reports and available statistics do tell something about the class age disaggregation, though methodologies and metrics vary in a quite relevant way. In Denmark, as of 2020, the percentage of people listening to radio “on a weekly basis” is the highest among 46-55 aged and 56+ aged (85% in both cases), whereas it regularly decreases amongst younger audiences: 77% in the 36-35 class; 65% in the 26-35 class; and 58% in the 15-25 class. In Netherlands we have a similar pattern, with daily use being more frequent in the 65+ age group (74,1%) and in the 50-64 group (71,9%), and less intense in the 35-49 (66,5%), 20-34 (51,6%) and 10-19 (45,4%) age clusters. In Germany, daily attention for radio peaks amongst people over 50 (80.4%), and confirms the above demographic patterns, with 30-59 age group being in the middle (73,3%), and only 68.8% of 14-49 aged Germans daily listening to radio. Spain and UK, on the other hand, reveal a different tendency, even though data, once again, are collected in such a way to make it difficult a proper comparison.

Table 68. How often Europeans listen to radio by age group, 2018, percentage of the population

Frequency/Age group	15-24	25-39	40-54	55+
Once a week+	61%	75%	82%	70%
Every-day or almost	29%	44%	56%	48%
2-3 times a week	20%	18%	18%	16%
Once a week	12%	8%	8%	6%
2-3 times per month	4%	4%	3%	3%
Rarely	13%	5%	5%	6%
Never	21%	10%	10%	19%

[Source: EuroBarometer]

Table 68 reveals a certain degree of homogeneity in radio listening among different age groups, that will not be confirmed by other statistics – which, in another way, would confirm the predominance of aged people. For instance, the use of the radio for information is more frequent among people aged 50+ in most of the countries, despite the overall differences among them [tables 70 and 71].

Table 69. Radio listening by age group, 2020, percentage users “on a weekly basis”

Age group	Percentage
15-25	58%

26-35	65%
36-45	77%
46-55	85%
56+	85%

[Source: Audience Project]

Table 70. Percentage of people getting news from radio every-day by age class, 2018

Country/Age Class	18-29	30-49	50+	Oldest/Youngest Gap
Sweden	34%	58%	72%	+38
Denmark	33%	56%	65%	+32
France	29%	57%	57%	+28
Spain	27%	48%	53%	+26
UK	28%	56%	53%	+25
Germany	49%	69%	72%	+23
Netherlands	40%	57%	58%	+18
Italy	41%	56%	43%	+2

[Source: Pew Internet Research Center]

Table 71. Percentage of people never getting news from radio by age class, 2018

Country/Age Class	18-29	30-49	50+	Oldest/Youngest Gap
Italy	24%	22%	35%	+11
Netherlands	23%	17%	26%	+3
Spain	40%	25%	32%	-8
Germany	21%	10%	13%	-8
France	37%	21%	27%	-10
UK	38%	17%	27%	-11
Denmark	30%	19%	15%	-15
Sweden	27%	9%	8%	-19

[Source: Pew Internet Research Center]

Table 72. Young Europeans and the radio, 2021

Type of listening	Overall EU population	European Youth [15-24 age class]
Daily listening	2h 18'	1h 21'
Weekly reach	84%	79%
Public Service Weekly reach	45%	30%

Public Service Market Share	40%	27%
--------------------------------	-----	-----

[Source: European Broadcasting Union]

(3.2) Italy

Table 73. Number of radio listeners in Italy, 2006-2020, absolute values

Year	Listeners [in thousands]
2006	35,766
2007	35,824
2008	34,441
2009	34,638
2010	34,656
2011	34,206
2012	34,023
2013	33,606
2014	33,451
2015	NA
2016	31,234
2017	32,189
2018	34,226
2019	34,483
2020	32,961

[Source: ISTAT]

Table 74. Listening habits by class age in Italy, 2017: how often compared to three years ago

Age group/Change	More often	The same	Less often
14-17	20%	30%	50%
18-24	21%	32%	47%
25-34	28%	40%	32%
35-44	29%	50%	22%
45-54	22%	62%	17%
55-64	23%	58%	19%
65-74	20%	63%	17%

[Source: IPSOS]

Table 74 provides interesting data, based on the typical self-perception methodology followed by IPSOS. Two different parts of the population are clearly separated, with aged 14-34 using radio less often than in the past, and aged 35+ using it even more frequently than before. The impact of new forms of consumption – i.e., Spotify, podcasting, and so on – is the most intuitive explanation of that tendency.

Table 75. Radio listeners in Italy by class age, 2020

Age class	Number of listeners [in thousands]
3-5	344
6-10	1,016
11-14	1,182
15-17	985
18-19	611
20-24	1,546
25-34	4,128
25-44	5,502
45-54	6,850
55-59	2,932
60-64	2,453
65+	3,276

[Source: Statista]

Table 76. Listeners by occupation in Italy, 2019-2020 [in thousands]

Occupation/Year	2019 [every-day listeners]	2020 [listeners]
Middle management and white collar	4,350	6,592
Blue collar and apprentice	3,281	5,356
Retired	2,130	4,584
Housewife	1,678	3,783
Executive, employer, professional	1,354	2,248
Self-employed, family worker, precarious	1,234	1,893
Student	1,201	2,279
Unemployed	1,453	3,246
Other	147	630

[Source: ISTAT]

Table 77. Radio listeners in Italy by education, 2019, absolute values

Education Level	Listeners [in thousands]
Primary school or no degree	2,018
Lower secondary school	5,017
Upper and post-secondary	7,425
Tertiary [degree and upper]	3,324

[Source: ISTAT]

Table 78. Radio listeners in Italy by gender and occupation, 2019, absolute values

Occupation/Gender	M [in thousands]	F [in thousands]
Middle management and white collar	3,733	3,820
Blue collar and apprentice	3,398	1,859
Retired	2,988	1,765
Housewife	NA	3,681
Executive, employer, professional	1,500	678
Self-employed, family worker, precarious	1,388	652
Student	1,160	1,416
Unemployed	1,642	1,448
Other	182	166

[Source: ISTAT]

Table 79. Radio listeners in Italy by gender and age class, 2020, absolute values

Age Class/Gender	M [in thousands]	F [in thousands]
3-5	171	76
6-10	502	202
11-14	576	335
15-17	461	272
18-19	300	161
20-24	773	490
25-34	2,035	1,309
35-44	2,781	1,671
45-54	3,558	1,882
55-59	1,564	654

60-64	1,275	432
65-74	1,753	580
75+	953	575

[Source: ISTAT]

Table 80. Radio listeners in Italy by gender, absolute values, 2006-2020

Year	Men [in thousands]	Women [in thousands]
2006	10,673	18,337
2007	10,722	18,419
2008	10,013	17,428
2009	10,170	17,452
2010	10,369	17,494
2011	10,042	17,211
2012	10,115	17,154
2013	10,040	16,906
2014	9,786	16,754
2015	9,563	17,183
2016	NA	15,695
2017	NA	15,630
2018	NA	16,750
2019	NA	17,015

[Source: ISTAT]

(3.3) Germany

According to Statista, 73% of German listens to radio on a weekly basis, while 27% does it less often or at all. The most significant historical series, though, shows how radio listening has been increasing in the last 25 years – or better, it has increased from 167 to 196 minutes per day between 1995 and 2004, and after the peak it has started a very low decrease.

Table 81. Average daily radio listening time in Germany, 1995-2019, minutes per day

Year	Minutes
1995	167
1996	169
1997	177
1998	172
1999	179

2000	209
2001	203
2002	202
2003	196
2004	196
2005	193
2006	186
2007	186
2008	176
2009	177
2010	186
2011	186
2012	187
2013	186
2014	181
2015	186
2016	178
2017	181
2018	181
2019	184

[Source: Statista]

Table 82 offers a confirmation of the diffusion of radio consumption in Germany, with a small decrease visible only in some clusters: people listening 3 hours, or more than 4 hours per day. Data reproduced in table 83 are actually inconsistent with those collected by Statista, then, but they show an interesting growth in the daily use of different media – radio, TV, and the web – that are usually considered to be in mutual competition. Patterns of correlation among different media practices, in any case, will be shortly investigated in the final section.

Table 82. Average radio listening in Germany per day, 2016-2020, absolute values [in millions]

Length/Year	2016	2017	2018	2019	2020
4 hours+	8,95	9,05	9,06	8,65	8,3
4 hours	3,55	3,79	3,89	3,75	3,63
3 hours	5,75	5,89	6,21	6,45	6,48
2 hours	11,91	11,84	12,28	12,76	12,69
1 hour	14,29	14,5	13,96	13,73	14,07
Less than 1 hour	20,28	19,99	19,7	19,74	20,28
Never	4,84	5,04	5,35	5,52	5,19

[Source: Statista]

Table 83. Radio, Tv and Internet use in Germany, minutes per day, 2006-2014 [age 14+]

Medium/Year	2006	2007	2008	2009	2010	2011	2012	2013	2014
Radio	186	185	186	182	187	192	191	191	192
TV	235	225	225	228	244	229	242	242	240
Internet	48	54	58	70	77	80	83	108	111

[Source: Hasebrink & others 2015]

(3.4) Spain

At a first glance, radio listening in Spain follows the same historical trend as in Germany, with a growth between late 1990s and 2004, and an inversion of the trend in the very same year.

Table 84. Average daily time listening to radio in Spain, 1997-2019

Year	Minutes per day
1997	100.2
1998	95.8
1999	95
2000	94.8
2001	93.8
2002	102.9
2003	117.7
2004	114.8
2005	109.7
2006	111.6
2007	108.1
2008	104.3
2009	107.7
2010	110.4
2011	114
2012	110.9
2013	108.3
2014	105.1
2015	103.6
2016	103
2017	98.8
2018	97.3
2019	93.6

[Source: Statista]

Table 85. Frequency of radio listening in Spain, 2014-2017

Frequency/Year	2014	2017
More often than twice daily	15.1%	NA
Daily	36.9%	72%
Weekly	18.8%	23%
Monthly	2.3%	3%
Occasionally	17.5%	2%
Never	6.6%	NA

[Source: Elaboration on Statista data]

As radio penetration has increased among all age groups [table 86], it is evident that the medium has eventually reached a wider audience, while at the same time lessening in terms of per capita average listening.

Table 86. Radio penetration in Spain by age, 2014- 2020 [percentage on the population]

Class Age	2014	2020
14-19	NA	41,5%
20-24	26,9% [18-24]	45,9%
25-34	45,6%	52,6%
35-44	51,7%	60%
45-54	43,7%	63,4%
55-64	32,1%	59,4%
65+	NA	47,3%

[Source: Statista]

Table 87. People listening to radio in Spain by social class, 2016 [share of listeners]

Class	Share
Upper Class	13.7%
Upper-middle Class	20%
Middle class	44.3%
Middle-lower class	19%
Lower class	3.1%

[Source: Statista]

Table 88. People listening to radio in Spain by family role and program, 2019

Program/Family Role	Stay-at-home	Main Earner	Other
General programs	45.4%	56.6%	20.7%
Thematic programs	42.7%	42.1%	33.9%
Music	42%	40%	34.8%
Informative programs	39.9%	61.6%	22.8%

[Source: Statista]

(3.5) France

At both levels of rough numbers and trust in the medium, radio in France is maintaining its audiences' attention [tables 89, 90, and 91].

Table 89. Number of radio listeners in France, 2009-2019, absolute values

Year	Listeners [in millions]
2009	42.3
2010	43.1
2011	43.1
2012	43.2
2013	43
2014	43.4
2015	43.3
2016	43.3
2017	43.3
2018	43.1
2019	42.9

[Source: European Broadcasting Union]

Table 90. Average daily radio listening in France, 2015-2020, minutes per day

Year	Minutes per day
2015	175
2016	175
2017	172
2018	170
2019	166
2020	168

[Source: Médiamétrie]

Table 91. How often people listen to radio in France, 2017-2018, percentage of the population

Frequency/Year	2017	2018
Daily	57.9%	54.2%
Weekly	14.4%	15.2%
Rarely	20.6%	22%
Never	6.5%	7.9%

[Source: Statista]

Frequency of listening has been decreasing, as shown in table 91; while radio is still trusted as it was fifteen years ago [table 92].

Table 92. Trust in radio news in France, 2005-2021, percentage of the population

Year/Opinion	Not reliable	Highly reliable
2005	43%	53%
2006	40%	54%
2007	39%	57%
2008	36%	47%
2009	35%	58%
2010	34%	60%
2011	36%	57%
2012	33%	58%
2013	35%	54%
2014	33%	58%
2015	27%	63%
2016	34%	55%
2017	40%	52%
2018	34%	56%
2019	40%	50%
2020	40%	50%
2021	36%	52%

[Source: Statista]

(3.6) BENELUX

Data about BENELUX cover a very limited time-span, and therefore can hardly allow for analytical observation. For what we can see, though, popularity of the medium has declined in Netherlands more than in Belgium.

Table 93. Share of daily listener in Belgium/Flanders, 2012-2016

Year	Share
2012	78%
2013	78%
2014	77%
2015	78%
2016	79%

[Source: Statista]

Table 94 How often people listen to radio in Belgium, 2017-2018, share of respondents

Frequency/Year	2017	2018
Daily	63.8%	63%
Weekly	13.1%	13.4%
Rarely	17.4%	17.2%
Never	5.1%	5.8%

[Source: Statista]

Table 95. Daily radio listening by location in Dutch Belgium, 2017, distribution of listening time

Location	Time
At home	58%
Work	20%
In the car	16%
Other	2%
Do not know	4%

[Source: Statista]

Table 96. Radio penetration in The Netherlands: percentage of daily users, 2013-2019

Year	People using radio every-day or almost [age 13+]
2013	74%
2014	76%
2015	74%
2015	74%
2016	71%
2017	62%
2018	57%
2019	59%

[Source: Statista]

Table 97. Average daily listening time in The Netherlands, 2006-2019

Year	Minutes per day
2006	192
2007	187
2008	195
2009	201
2010	200
2011	203
2012	185
65+	184
2014	175
2015	173
2016	167
2017	163
2018	155
2019	155

[Source: Statista]

Table 98. Time listening to radio in The Netherlands by age, 2018, minutes per day

Age group	Total listening time
13-34	134
35-49	186
50-64	182
65+	138

[Source: Statista]

Table 99. Daily radio reach in The Netherlands by age, 2018, share of individuals

Age group	Share
10-19	45.4%
20-34	51.6%
35-49	66.4%
50-64	61.9%
65+	74.1%

[Source: Statista]

(3.7) Eastern Europe

Available data offers some qualitative insights into audience habits in Hungary, in particular [table 102]. In terms of general tendencies, a small decrease in radio consumption is visible in Poland [table 103].

Table 100. Changes in radio listening habits in Hungary, 2018, percentage of the population

Habit	Percentage
I spend significantly less time listening to radio	13%
I spend somewhat less time listening to radio	13%
No changes	66%
I spend somewhat more time listening to radio	5%
I spend significantly more time listening to radio	2%

[Source: Statista]

Table 101. Weekly number of radio stations in Hungary by age, 2015

Age Class	Number of stations
15-17	1
18-29	2
30-39	1,4
40-49	1,5
50-59	1,5
60-69	1,9
70+	1,7

[Source: European Broadcasting Union]

Table 102. Hungarians listening to radio by location and by age, 2020

Age class/Location	At home	In the car	At work	Other
15-19	55%	34%	4%	14%
20-29	63%	56%	28%	23%
30-39	66%	65%	37%	20%
40-49	69%	62%	36%	20%
50-59	75%	55%	32%	15%
60-69	87%	32%	7%	8%
70+	80%	18%	2%	5%

[Source: Statista]

Table 103. Average radio daily listening time in Poland, 2013-2019, minutes per day

Year	Minutes
2013	272
2014	269
2015	273
2016	270
2017	266
2018	272
2019	269
2020	263

[Source: Statista]

(3.8) The Nordics

By and large, radio in the Nordics is in good health [tables 104 and 106], though the overall data result from a combination of very different situations. In particular, we observe a small decline in Denmark [table 107 and 108], and a more stable trend in Sweden, where daily listening is decreasing [table 112], while daily reaching of radio is augmenting [table 114]. More detailed data are available for Norwegian audiences.

Table 104. Average daily radio reach in the Nordics, 2013-2018 [percentage of the population]

Country/Year	2013	2014	2015	2016	2017	2018
Denmark	74%	75%	74%	74%	72%	71%
Finland	76%	76%	76%	75%	74%	71%
Norway	70%	70%	79%	68%	63%	57%
Sweden	74%	73%	73%	73%	71%	71%

[Source: Nordicom]

Table 105. Average listening time in the Nordics, 2013-2019 [minutes per day]

Country/Year	2013	2014	2015	2016	2017	2018	2019
Denmark	117	116	121	116	111	107	104
Finland	183	181	179	181	176	168	160
Norway	90	90	89	85	79	72	90
Sweden	111	107	107	107	106	104	109

[Source: Nordicom]

Table 106. Radio on a daily basis in the Nordics, 2020

Country	Percentage
Denmark	75%
Sweden	73%
Finland	72%
Norway	70%

[Source: Nordicom]

Table 107. Average daily radio reach in Denmark, 2008-2018, percentage of the population

Year	Percentage
2008	80%
2009	78%
2010	77%
2011	76%
2012	75%
2013	74%
2014	75%
2015	74%
2016	74%
2017	72%
2018	71%

[Source: Nordicom]

Table 108. Average daily radio listening time in Denmark, 2009-2019, minutes per day

Year	Percentage
2009	127
2010	123
2011	121
2012	119
2013	117
2014	116
2015	121
2016	116
2017	111
2018	107
2019	104

[Source: Nordicom]

Table 109. Radio listening time in Denmark, PSM and commercial, 2009-2019 [audience share]

Year/Type	Public	Commercial
2009	75.8%	24.2%
2010	79.9%	20.1%
2011	78.8%	21.2%
2012	77.3%	22.7%
2013	77.9%	22.1%
2014	75.4%	24.6%
2015	76.5%	23.5%
2016	75.3%	24.7%
2017	75.1%	24.9%
2018	76.4%	23.6%
2019	77.2%	22.8%

[Source: Nordicom]

Table 110. Average daily radio reach in Sweden, 2007-2017, percentage of the population

Year	Percentage
2007	74%
2008	75%
2009	75%
2010	73%
2011	72%
2012	71%
2013	74%
2014	73%
2015	73.1%
2016	72.5%
2017	71%

[Source: Statista]

Table 111. Share of weekly listeners in Sweden, 2009-2020

Year	Percentage
2009	73%
2010	70%
2011	67%
2012	67%
2013	67%

2014	67%
2015	68%
2016	69%
2017	62%
2018	61%
2019	73%
2020	75%

[Source: Nordicom]

Table 112. Average daily radio listening time in Sweden, 2014-2020, minutes per day

Year	Percentage
2014	82
2015	81
2016	80
2017	76
2018	62
2019	87
2020	88

[Source: Nordicom]

Table 113. Daily radio listeners in Sweden by age class, 2020 [share of individuals]

Age class	Share
9-14	67%
15-24	62%
25-44	71%
45-64	82%
65-85	81%

[Source: Nordicom]

Table 114. Average daily radio listening time in Sweden, 2010-2020, minutes per day

Year	Minutes
2010	197
2011	193
2012	192
2013	185
2014	182
2015	179

2016	181
2017	176
2018	168
2019	160
2020	154

[Source: Nordicom]

Table 115. Radio as the main news source in Finland by age group, 2021

Age group	Percentage
18-24	3%
25-34	3%
35-44	6%
45-54	5%
55-64	4%
65+	7%

[Source: European Broadcasting Union]

Table 116. Share of listeners to public radio in Finland by age group, 2016

Age group	Share
16-24	22%
25-34	34%
35-44	39%
45-54	52%
55-65	60%

[Source: Statista]

Table 117. Radio listening in Finland by age group and location, 2020

Class Age/Location	Home	Car	Work	Other
9-24	22%	38%	34%	6%
25-54	30%	33%	31%	6%
55+	72%	15%	7%	6%
Average	54%	23%	17%	6%

[Source: Statista]

Table 118. Average daily radio reach in Norway, 2008-2018, percentage of the population

Year	Percentage

2008	78%
2009	75%
2010	75%
2011	75%
2012	72%
2013	70%
2014	70%
2015	69%
2016	68%
2017	63%
2018	58%

[Source: Statista]

Table 119. Average daily radio listening time in Norway by gender, 2009-2019, minutes per day

Year	M	F	Total
2009	79	86	82
2010	85	78	81
2011	90	82	86
2012	101	90	96
2013	93	86	90
2014	107	94	100
2015	88	77	83
2016	81	74	78
2017	84	73	78
2018	77	59	68
2019	72	57	68

[Source: Statista]

Table 120. Average radio listening time in Norway by age group, 2009-2019, minutes per day

Year/Age class	9-15	16-24	25-44	45-66	67-79
2009	32	103	47	18	6
2010	48	105	42	21	6
2011	29	91	42	14	9
2012	36	80	40	20	8
2013	39	78	46	20	11
2014	32	82	46	16	6
2015	31	75	39	17	7
2016	34	89	52	18	5

2017	41	102	59	27	11
2018	36	102	64	23	9
2019	32	105	65	30	9

[Source: Statista]

Table 121. Radio listening in Norway by gender and by program, 2020 [share of listeners]

Program/Gender	F	M
Pop music	50%	48%
News	49%	44%
Entertainment	25%	23%
Local information program	24%	21%
Other information	7%	6%
Weather forecast	15%	11%
Other	8%	9%
Sport	2%	6%
Classical music	4%	4%
Youth and children	1%	1%
Religion	1%	0%

[Source: Nordicom]

Table 122. Radio audience in Norway by program, 2018-2020 [share of listeners]

Program/Year	2018	2019	2020
Pop music	49%	48%	56%
News	47%	44%	42%
Entertainment	24%	27%	28%
Local information program	23%	22%	21%
Other information	7%	10%	7%
Weather forecast	13%	12%	9%
Other	9%	10%	6%
Sport	4%	5%	8%
Classical music	4%	4%	3%
Youth and children	1%	1%	0%
Religion	1%	0%	1%
Culture	6%	6%	4%

[Source: Statista]

(3.9) Other Countries

Data related to other countries are limited and patchy. What is relevant, Turkey is the country in which radio is less trusted and used, when compared with the EU averages [table 126].

Table 123. Penetration of online radio in UK by age, 2021

Class Age	Percentage
16-24	10%
25-34%	15%
35-44	15%
45-54	11%
55-64	10%
65-74	8%
75+	4%

[Source: Statista]

Table 124. People weekly listening to radio in UK by age class, 2020

Age class	Share
15-25	55%
26-35	70%
36-45	72%
46-55	77%
56+	78%

[Source: Audience Project]

Table 125. How often people listen to radio in Ireland, 2017-18, share of respondents

Frequency/Year	2017	2018
Daily	66.2%	61.1%
Weekly	11.2%	12.3%
Rarely	17.2%	18.9%
Never	5%	6.8%

[Source: Statista]

Table 126. How often people listen to radio in Turkey, 2017-18, share of respondents

Frequency/Year	2017	2018
Daily	32.2%	24.7%
Weekly	25.9%	12.3%
Rarely	28.8%	31%

Never	12.2%	14.7%
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[Source: Statista]

Table 127. Daily radio listening time in Portugal, 2010-2018, minutes per day

Year	Minutes
2010	194.6
2011	194.6
2012	193.6
2013	193.1
2014	195.5
2015	191
2016	191.2
2017	191.2
2018	191.8

[Source: Statista]

(4) Patterns in TV consumption

(4.1) European trends

General data indicate that traditional TV watching, at the TV-set, is more common among women than it is among men [table 129], and – more predictably – less appreciated by youngsters and young adults [table 130].

Table 128. Watching TV on a Tv set in EU, 2021 [age 15+]

Frequency	Percentage
Every-day or almost	78%
One to three times a week	13%
Two or three times a month	5%
Never	4%

[Source: Statista]

Table 129. Watching TV on a Tv set in EU by gender, 2019

Frequency	M	F
Every-day or almost	74%	79%

At least once a week	89%	91%
One to three times a week	11%	9%
Two or three times a month	1%	1%
Less often	4%	3%
Never	6%	5%

[Source: EuroBarometer]

Table 130. Watching TV on a Tv set in EU by age group, 2019, share of respondents

Frequency/ Age group	15-24	25-39	40-54	55+
At least once a week	79%	85%	92%	95%
Every-day or almost	55%	68%	78%	89%
Two or three times a week	17%	13%	11%	5%
Once a week	7%	4%	3%	1%
2-3 times a month	3%	2%	1%	1%
Less often	8%	5%	2%	1%
Never	9%	8%	5%	3%
Don't know	1%	0%	0%	0%

[Source: EuroBarometer]

Table 131. Share of people watching TV or Tv via Internet every day in EU, 2011-2021, share of respondents

Year	Share
2011	87%
2012	87%
2013	87%
2014	86%
2015	84%
2016	82%
2017	84%
2018	81%
2019	81%
2020	82%

[Source; EuroBarometer]

Table 132. Average daily time watching TV in EU, 2015-2019, minutes per day

Year	Minutes per day
2015	223

2016	222
2017	221
2018	218
2019	214

[Source: European Audiovisual Observatory]

Table 133 opens a longitudinal perspective, according to which the decrease *rate* in TV watching has been slowing down almost everywhere in the age of platforms, with the average net result of -4 minutes per day, in the time-span 2011-2019. Daily time of consuming has significantly increased in several countries: Romania (+67 minutes), Cyprus (+45), Portugal (+44), Slovenia (+39), Slovakia (+29), Bulgaria (+26), Turkey (+26), Austria (+25). To a lower extent, daily TV time has augmented also in Poland, Latvia, Lithuania, Czech Republic, Greece, and Croatia. While the growth is mostly concentrated within two specific systems – Mediterranean and Eastern – the case of Austria and Baltic countries is harder to explain upon the commonly used frameworks. For what concerns Southern European countries, they have been more deeply affected by the post-2008 economic crisis, also resulting in a likely contraction of more expensive activities and in the following centrality of domestic cultural consumption [Bergés Saura & Papathanassopoulos 2015, 55-57]. On the other hand, a *significant* decrease in the time spent watching TV is visible in only four countries: Netherlands (-35 minutes), and more markedly UK, Denmark and Ireland, with -1 hour approximately.

Table 133. Daily TV viewing in Europe, hours and minutes per day, 2011-2019

Country	Age group	2011	2012	2013	2014	2015	2016	2017	2018	2019
AT	3+	2:38	2:48	2:38	2:42	2:40	2:47	2:55	2:59	3:03
BE	4+	3:02	3:08	3:05	3:05	3:03	3:03	3:01	2:52	2:50
BG	4+	3:45	3:49	3:45	3:43	3:51	3:55	4:12	4:14	4:11
CY	4+	2:45	2:59	3:22	3:30	3:24	3:24	3:29	3:29	3:30
CZ	4+	3:17	3:21	3:28	3:27	3:26	3:28	3:31	3:30	3:26
DE	3+	3:45	3:42	3:41	3:41	3:42	3:43	3:41	3:37	3:30
DK	3+	3:18	3:15	3:00	2:53	2:55	2:40	2:30	2:22	2:17
EE	4+	3:49	3:46	3:36	3:40	3:42	3:46	4:03	3:49	3:46
FI	4+	2:52	2:55	2:54	2:56	2:51	2:52	2:48	2:45	2:42
FR	4+	3:47	3:50	3:46	3:41	3:44	3:43	3:42	3:36	3:30
GR	4+	4:28	4:22	4:11	4:17	4:29	4:17	4:22	4:26	4:32
HR	4+	4:27	4:23	4:15	4:19	4:25	4:25	4:25	4:20	4:28
HU	4+	4:46	4:46	4:46	4:49	4:43	4:48	4:39	4:36	4:38
IE	4+	3:25	3:23	3:16	3:14	3:14	3:06	2:55	2:47	2:37
IT	4+	4:14	4:17	4:21	4:22	4:14	4:07	4:04	4:08	4:04

LT	4+	3:24	3:36	3:40	3:24	3:34	3:45	3:56	3:44	3:35
LV	4+	3:29	3:34	3:19	3:30	3:31	3:14	2:57	2:56	2:57
NL	6+	3:11	3:16	3:15	3:20	3:10	3:03	2:58	2:53	2:36
PL	4+	4:02	4:03	4:07	4:20	4:23	4:21	4:19	4:17	4:16
PT	4+	3:39	4:44	4:58	4:56	4:43	4:46	4:44	4:43	4:24
RO	4+	4:22	5:26	5:41	5:42	5:29	5:47	5:46	5:37	5:29
SE	3+	2:42	2:44	2:39	2:33	2:34	2:28	2:20	2:13	2:07
SI	4+	3:06	3:13	3:15	3:19	3:25	3:35	3:35	3:38	3:47
SK	4+	3:27	3:38	3:47	3:48	3:48	3:57	3:57	3:57	3:58
TR	5+	3:48	4:02	4:00	4:07	4:03	4:04	4:21	4:18	4:14
UK	4+	4:02	4:01	3:52	3:40	3:36	3:32	3:23	3:12	3:02
EU_avg	--	3:38	3:43	3:39	3:42	3:43	3:42	3:41	3:38	3:34

[Source: European Audiovisual Observatory]

As table 134 confirms, despite data being incomplete, Europeans basically watch TV as much as they used to do in 2001. Averages can not be compared, as the 2001 one covers fifteen countries, but a tangible decrease, over the 2001-2019 timeframe, is only visible in eight countries out of twenty-six - Belgium, Denmark, Estonia, Finland, Latvia, Netherlands, Sweden and UK - with almost insignificant variations in Slovakia (-4 minutes) and France (-1).

Table 134. Daily TV viewing in Europe, minutes per day, 1990-2001

Country/Year	1990	1995	1996	1997	1998	1999	2000	2001
AT	NA	139	141	NA	NA	138	139	142
BE	NA	176	180	173	182	172	177	181
BG	NA	NA	245	NA	NA	NA	231	189
CY	NA	NA	NA	NA	214	217	224	236
CZ	NA	NA	NA	NA	NA	NA	194	202
DE	NA	175	183	183	201	198	203	205
DK	NA	164	166	155	162	159	152	154
EE	NA	188	221	NA	232	231	253	259
ES	NA	NA	NA	209	210	221	221	216
FI	111	104	140	149	149	149	161	168
FR	184	180	180	180	NA	199	204	209
HU	NA	212	202	NA	233	240	249	250
IE	NA	188	188	182	194	186	181	178
IS	NA	NA	NA	NA	142	120	145	146
IT	191	213	215	212	221	233	238	241
LT	NA	NA	NA	NA	205	224	208	199
LU	NA	156	144	136	NA	124	144	NA
LV	NA	NA	NA	NA	NA	272	258	264

MT	NA	212	202	NA	233	240	249	250
NL	116	151	157	155	165	163	163	166
PL	NA	NA	NA	NA	NA	218	220	219
PT	NA	169	165	165	157	202	203	197
RO	NA	NA	NA	NA	211	210	216	213
SE	NA	134	140	141	144	143	150	148
SI	NA	NA	NA	NA	100	158	168	168
SK	NA	NA	NA	NA	NA	243	249	242
UK	206	215	215	215	217	220	221	218
EU_15	NA	187	191	195	205	205	208	210

[Source: Luxembourg Office for Official Publications of European Communities]

Table 135. Clusters in daily TV time in Europe, 2019

Patterns	Countries
Very High use [over 300 minutes]	Romania: 331 Serbia: 325
High use [250-299 minutes]	Hungary: 279 Macedonia: 277 Greece: 273 Portugal: 265 Croatia: 261 Poland: 259 Turkey: 254 Bulgaria: 251
Medium to high use [200-249 minutes]	Italy: 244 Belgium South: 239 Slovakia: 238 Slovenia: 227 Estonia: 226 Spain: 215 Lithuania: 215 Germany: 211 Cyprus: 210 France: 210 Czechia: 206
Low to medium use 150-199	Belgium North: 197 Austria: 184 UK: 183 Latvia: 177

	Italian Switzerland: 163 Finland: 162 Ireland: 158 Netherlands: 156
Low use 150-	Luxembourg: 145 Denmark: 137 French Switzerland: 131 Sweden: 127 German Switzerland: 112 Norway: 108
EU average	<i>219 minutes per day</i>

[Source: Elaboration on Statista data]

Table 136. Share of people watching TV on a TV-set every-day or almost in Europe, 2021

Country	Percentage of the population
Romania	90%
Italy	89%
Bulgaria	89%
Croatia	87%
Spain	83%
Portugal	81%
Poland	81%
Austria	80%
Cyprus	79%
UK	77%
Hungary	76%
Slovakia	75%
Netherlands	74%
Greece	73%
France	72%
Germany	72%
Belgium	71%
Luxembourg	71%
Slovenia	68%
Denmark	67%
Finland	67%

Czechia	66%
Estonia	66%
Lithuania	66%
Malta	63%
Ireland	62%
Sweden	62%
Latvia	61%
EU_27	78%

[Source: Statista]

Table 137. Share of people watching Tv every day or almost – TV-set and Web - in EU, 2011-2021

Year	Share of respondents
2011	87%
2012	87%
2013	87%
2014	86%
2015	84%
2016	82%
2017	84%
2018	81%
2019	81%
2020	NA
2021	82%

[Source: EuroBarometer]

Table 138. Average daily time watching TV in EU, 2015-2019, EU_28

Year	Minutes per day
2015	223
2016	222
2017	221
2018	218
2019	214

[Source: European Audiovisual Observatory]

As to the breakdown by socio-demographic variables [table 139], strong TV watchers are still concentrated among the usual categories: aged and low-educated people, retired, and more generally in the working class.

Table 139. Watching TV on a Tv-set by socio-demographic variables, 2018, percentage of the population

Category/ Modality	Every-day or almost	2-3 times a week	Once a week	2-3 times a month	Less often	Never
EU_28	77	10	3	1	3	6
<i>Gender</i>						
Men	74	11	4	1	4	6
Women	79	9	3	1	3	5
<i>Age Group</i>						
Age 15-24	55	17	7	3	8	9
Age 25-39	68	13	4	2	5	8
Age 40-54	89	5	1	1	1	3
<i>Education</i>						
Low education	91	3	1	1	1	3
Middle education	81	9	3	2	2	4
High education	71	13	4	2	3	7
Still studying	51	19	7	4	9	10
<i>Occupation</i>						
Self-employed	71	13	4	1	4	7
Manager	68	15	5	1	5	6
Employees	76	12	5	1	2	4
Manual workers	77	10	3	1	3	6
House persons	83	8	2	1	2	4
Unemployed	77	8	3	2	3	7
Retired	90	4	1	1	1	3
Student	51	19	7	4	9	10
<i>Social class self-assessment</i>						
Working-class	84	7	1	1	2	5
Lower middle class	76	10	4	1	4	5
Middle class	75	11	4	1	3	6
Upper middle class	65	15	6	2	5	7
Upper class	70	7	5	2	6	10

[Source: EuroBarometer]

Table 140 assesses the state of a very European category, that of Public Service Media (PSM). Daily audience of PSM television is generally slightly decreasing, while growing in Finland, Czechia, Iceland, Germany, Lithuania, Denmark, Estonia and Sweden. The increase in daily share

is more surprising in Czechia and Lithuania, where the share of the four main channels is rather lowering [table 142].

Table 140. A typical European form: daily audience share of public Tv in Europe, 2010-2019

Country/year	2010	2013	2016	2019
AT	38,8%	34,9%	34,4%	30,5%
BE_CFB	21,2%	21%	24,3%	24,7%
BE_VLG	42,5%	40,3%	39,3%	38%
BG	10,3%	7,4%	9,5%	5,8%
CH_German	34%	32%	32,2%	31,7%
CH_Italian	35,3%	37,9%	32,7%	27,1%
CH_French	29,8%	30,4%	28,5%	27,2%
CY	19,7%	19,4%	17,1%	12,9%
CZ	28,3%	29,2%	31,2%	30,1%
DE	43,4%	44,1%	45,1%	47,3%
DK	61,6%	65,9%	74,4%	76,4%
EE	17,4%	17,6%	16,8%	20,4%
ES	35,6%	25,1%	23,9%	15,5%
FI	45,1%	41,8%	44,8%	43,5%
FR	33,2%	30,6%	30,9%	31,8%
GR	15%	7,9%	8,6%	8,7%
HR	38,2%	26,1%	29,2%	27,1%
HU	13,2%	14,9%	17,1%	10,8%
IE	35,2%	28,6%	28,4%	27,2%
IS	NA	56,5%	59%	59,7%
IT	41,3%	38,7%	36,8%	35,8%
LT	12,1%	8,7%	9,8%	14,9%
LV	13,6%	12,6%	13%	12,5%
NL	36,5%	33,6%	32,1%	34,5%
NO	40,8%	41,3%	39,2%	39,6%
PL	40,8%	30%	29,6%	28,6%
PT	29,5%	17%	16,9%	14,8%
RO	7,6%	5,4%	3,5%	3,5%
SE	35,2%	35,3%	36,1%	35,7%
SI	30,9%	25,8%	22,3%	20,2%
SK	17,5%	11%	13,8%	13,9%
TR	NA	8,4%	11,4%	13,6%
UK	48%	46,2%	47,7%	45,1%

[Source: European Audiovisual Observatory]

The market share of the four main channels [table 141] is a main indicator for evaluating pluralism and openness of a given media system. In the 2009-2019 period, some countries have undergone a significant change: Croatia (-29.6%), Portugal (-29.5%), Hungary (-29.4%), Poland (-21.4%), Slovenia (-21.4%), Cyprus (-20.9%), Slovakia (-20%). In other countries, the audience concentration has decreased less significantly, and namely in Latvia (-19.6%), Italy (-17.4%), Czechia (-16.9%), Lithuania (-16.5%), Bulgaria (-16.2%). In some cases, the decrease is hardly perceptible, as in Netherlands, Denmark, German and French Switzerland, and Greece (-0.3%); in Romania and Sweden, concentration rate has even gone up. When one considers the dimensions of the technological revolution, current audience concentration appears quite surprising, and it poses once again a main research question for media studies – the relation between the plurality of market operators, made possible by technological disruptions, and the actual diversification of cultural products and audience niches. The issue was originally raised in a study on the cycles in popular music [Peterson & Berger 1975], but it is getting attention also in the field of comparative media studies [i.e., Peruško 2010; d’Haenens & others 2018].

Table 141. Market shares of the four main channels in European countries, 2009-2019

Country/year	2009	2012	2015	2018	2019
AT	47%	44,4%	42,7%	37,7%	36,6%
BE_CFB	61%	59%	57,3%	56,4%	56,2%
BE_VLG	68,1%	66,3%	65,1%	62,7%	62%
BG	70,8%	63,4%	NA	55,2%	54,6%
CH French	52,3%	48,3%	46,5%	46,7%	45,6%
CH German	41,3%	35,8%	38,2%	40,4%	39,1%
CH Italian	54%	49,3%	45,4%	41,1%	38,4%
CY	66,7%	62,5%	63,5%	49%	46,5%
CZ	79,3%	63,6%	54,5%	51,2%	52,4%
DE	51,2%	49,7%	46,5%	46,4%	46%
DK	60,7%	52,1%	55,2%	58,3%	59,2%
EE	62,3%	51,4%	48,1%	43,4%	41,8%
ES	54,4%	44,6%	45,4%	43,4%	41,6%
FI	72,2%	66,8%	64,7%	65,9%	64,8%
FR	65,4%	58,5%	54,8%	52,2%	51,6%
GR	57,3%	61,1%	60,8%	59,3%	57%
HR	86,6%	70,3%	60,2%	59,3%	57%
HU	56,5%	47,3%	35,8%	26,9%	26,9%
IE	51,4%	45,1%	36%	40%	39,8%
IS	NA	97,8%	93,9%	91,2%	84,4%

IT	61,5%	49%	45,8%	44,7%	44,1%
LT	65,1%	48,3%	48,4%	47,4%	48,6%
LV	53,5%	44,4%	37,7%	33,9%	33,9%
MT	NA	NA	66,5%	55%	63,6%
NL	51,7%	50,8%	48,5%	46,4%	49,5%
NO	65,6%	60,4%	60,1%	61,4%	60,5%
PL	67%	55,9%	43,3%	37,5%	36,4%
PT	81,9%	63,2%	57,9%	52,2%	51,4%
RO	34,5%	38,7%	41,9%	42,9%	44,7%
RU	56,5%	47,2%	43,1%	40,3%	38,2%
SE	56,3%	56,3%	55,9%	60,5%	60,6%
SI	64,2%	58,9%	50,5%	44,5%	42,8%
SK	69,7%	60%	52,2%	47,7%	47,7%
TR	43,4%	39,9%	33,8%	32,6%	34,7%
UK	52,9%	47,9%	46,5%	NA	NA
Average	59,7%	54,3%	51,3%	48,9%	48,3%

[Source: European Audiovisual Observatory]

With this respect, that statistics date back to 2004 may add another complication. When compared to the previous data, table 142 reveals how the decrease in audience concentration has been *discontinuous* in time – first an increase, up to an inversion point, and then the drop – in seven countries: Croatia, Lithuania, Poland, Estonia, Italy, Romania, and Latvia. Unless data are incongruous, this would call for a stratified interpretation of digital transition, and a more complex interpretation of media evolution at large.

Table 142. Audience concentration: market share of the top three TV channels in European countries, 2004

Country/Year	Share
Czech Republic	86,1%
Bulgaria	84,2%
Croatia	83,8%
Hungary	75,7%
Slovakia	72,9%
France	66,9%
Slovenia	64,9%
Lithuania	63,4%
Poland	62,6%
UK	61,7%
Estonia	59,9%
Italy	59,4%

Romania	57,5%
Latvia	52,2%
Germany	43,4%
Turkey	43%

[Source: Open Society Institute, *Television across Europe*]

A comparison with radio audience is not technically possible, finally, as in the case of radio available data are related to the *three*, rather than four most popular channels. By and large, here audiences seem to be slightly less concentrated and more diversified than TV audiences, but more precise data would be necessary.

Table 143. Market share of the top three radio channels in European countries, 2011

Country/Year	Share
Belgium_FR	48,3%
Cyprus	45,8%
Denmark	69,6%
Estonia	45%
Finland	55%
Germany	22,5%
Iceland	90%
Italy	42,5%
Lithuania	41,8%
Portugal	48.5%
Romania	37,7%
Spain_CAT	33%
Sweden	57%
Turkey	45,2%

[Source: UNESCO Institute for Statistics]

Table 144. People trusting TV by socio-demographic variables, 2019, percentage of the population

Category/ Trust	Tend to trust	Tend not to trust	Do not know
EU_28	49	47	4
<i>Gender</i>			
Men	48	48	4
Women	50	46	4
<i>Age group</i>			
Age 15-24	47	48	5
Age 25-39	43	52	5

Age 40-54	48	48	4
Age 55+	53	43	4
<i>Education</i>			
Low education	48	49	3
Middle education	49	47	4
High education	48	47	5
Still studying	49	45	6
<i>Occupation</i>			
Self-employed	43	52	5
Manager	50	47	5
Employees	51	45	4
Manual workers	46	50	4
House persons	53	43	4
Unemployed	39	57	4
Retired	53	43	4
Student	49	45	6
<i>Social class self-assessment</i>			
Working-class	45	50	5
Lower middle class	45	52	3
Middle class	50	46	4
Upper middle class	62	34	4
Upper class	67	32	1

[Source: Elaboration on EuroBarometer data]

(4.2) Italy

The Italian case shows a real stability in terms of TV audience, with a slow decline in the total share of watchers [table 145], and an increase in the average minutes per day, between 2009 and 2016 [table 135]. Qualitative research also shows the coexistence between new and old modalities of consumption, and precisely second-screen practices and conventional zapping [table 147].

Table 145. Share of individuals watching Tv at least once a week in Italy, 2007-2019

Year	Share
2007	93.1%
2008	NA
2009	91.7%
2010	NA
2011	94.4%
2012	95%
2013	95%
2014	NA
2015	94%
2016	95.5%
2017	92.2%
2018	89.9%
2019	87.4%

[Source: EuroBarometer]

Table 146. Average daily viewing time in Italy, 2009-2016

Year	Minutes per day
2009	238
2010	246
2011	253
2012	255
2013	261
2014	262
2015	254
2016	248

[Source: Statista]

Table 147. Favorite Tv habits in Italy, 2016

Habit	Percentage
Non-specific zapping	53%
Premium contents	50.9%
PC viewing and streaming	46.4%

Tablet viewing and streaming	39.3%
------------------------------	-------

[Source: Osservatorio Social TV, “Sapienza” University of Rome]

Disaggregated data also confirm the persistency of a classical pattern, with TV mostly being watched by female housewives; middle management women; and retired people [table 148].

Table 148. Individuals watching TV in Italy by occupation and by gender, 2018, absolute values

Occupational status	Female [in 1,000]	Male [in 1,000]
Middle management and white collar	4,361	3,584
Blue collar and apprentice	2,465	4,671
Retired	4,186	5,824
Housewife	7,094	NA
Executive, employer, professional	788	1,864
Self-employed, family worker, precarious	1,084	1,679
Student	1,930	1,697
Unemployed	2,562	2,637
Other	480	587

[Source: Elaboration on ISTAT data]

Even though tables 149 and 150 are based on different metrics, finally, they confirm the incidence of the over-65 in the overall composition of the audience, which is the more predictable, and at the same time the most impactful, in an old country. Demopolis surveys also reflect the generational gap, with the percentage of youngsters getting news from TV decreasing from 76% to 66%, in the 2009-2019 decade.

Table 149. Tv watchers by age group in Italy, 2019

Class Age	Number of watchers [in 1,000]
14-17	366
18-24	927
25-34	1,750
35-44	2,496
45-54	3,121
55-64	2,788
65+	4,312

[Source: IPSOS]

Table 150. Tv watchers by age group in Italy, 2020

Class Age	Number of watchers [in 1,000]
3-10	3,881
11-14	2,131
15-17	1,597
18-19	977
20-24	2,200
25-34	5,523
35-44	6,790
45-54	8,812
55-59	4,422
60-64	3,838
65-74	6,634
75+	6,554

[Source: ISTAT]

(4.3) France

General data about French audience appear to be more balanced in terms of age groups, when compared to the average.

Table 151. French population according to weekly hours watching TV, 2016

Weekly hours	Proportion of respondents
Non	5%
7 or less	17%
8-14	20%
15-21	26%
22-35	21%
36+	10%

[Source: CREDOC]

Table 152. People watching TV in France by age, 2018, weekly hours, proportion of respondents

Weekly hours/Age group	12-17	18-24	25-39	20-59	60-69	70+
Non	7%	12%	11%	4%	4%	3%

7 or less	37%	37%	26%	20%	11%	12%
8-14	24%	19%	22%	25%	16%	37%
15-21	18%	19%	22%	24%	33%	24%
22-35	7%	8%	12%	16%	21%	15%
36+	5%	3%	6%	10%	12%	NA

[Source: CREDOC]

Table 153. Weekly time watching TV in France by age group, 2016

Weekly hours/Age group	Under 50	50-75	Total
1 hour or less	9%	4%	7%
1-2 hours	9%	5%	8%
2-4 hours	12%	12%	11%
4-8 hours	18%	16%	12%
8-20 hours	38%	37%	38%
20+ hours	14%	20%	30%

[Source: Statista]

(4.4) Spain

The Spanish case is not distant from the Italian one, with a slow decline of TV – slightly faster in terms of daily average, than it is in terms of general share.

Table 154. Share of people watching TV in Spain, 1997-2020

Year	Share of respondents
1997	90.7%
1998	89.4%
1999	89.2%
2000	89.9%
2001	90.7%
2002	89.6%
2003	88.9%
2004	88.6%
2005	88.5%
2006	89%
2007	87.9%
2008	88.5%

2009	89.1%
2010	88.7%
2011	88.3%
2012-15	NA
2016	87.8%
2017	85.4%
2014	85.1%

[Source: AIMC]

Table 155. Average daily time watching TV in Spain, 1997-2020

Year	Minutes per day
1997	231.2
1998	222.2
1999	224
2000	222.4
2001	226
2002	235
2003	245.6
2004	238.8
2005	221.7
2006	NA
2007	220
2008	222.4
2009	222.9
2010	226.8
2011	237.1
2012	242
2013	NA
2014	237.8
2015	NA
2016	223.1
2017	215
2018	210.3
2019	212.9
220	208.9

[Source: AIMC]

Table 156. Reasons for watching TV in Spain, 2014, population 15+

Reason	Share of respondents
Entertainment	69.3%
Escaping	35.5%
Identification with the media	31.6%
Access to specific contents	22.6%
Information on hobbies	17.9%

[Source: Statista]

The breakdown by social class reveals a familiar pattern, with TV being most used by lower classes, arguably for compensating the lack of more expensive or more complex forms of cultural consumption.

Table 157. Share of people watching TV in Spain by social class, 2016

Class	Share of respondents
Lower class	90.3%
Middle-lower class	89.3%
Middle class	88.1%
Upper class	86.7%
Upper class	84.6%

[Source: AIMC]

Table 158. Distribution of people watching TV in Spain by age group, 2020

Class Age	Percentage
14-19	6,6%
20-24	5,3%
25-34	11,7%
35-44	16,9%
45-54	18,6%
55-64	16,1%
65+	24,8%

[Source: Statista]

In Spain too, oldest people are more likely to watch TV [table 159]; and for some reason this is also true in specific the case of regional channels attendance [table 160].

Table 159. Share of people watching TV in Spain by age group, 2020

Class Age	Share of respondents
14-19	77.6%
20-24	77.3%
25-34	76.4%
35-44	80%
45-54	84.2%
55-64	88.1%
65+	92.8%

[Source: Statista]

Table 160. Audience shares by age group in Spain, regional channels, 2020

Class Age	Percentage of the TV audience
4-12	4%
13-24	5,5%
25-44	6,6%
45-64	7,2%
65+	11,3%

[Source: Statista]

(4.5) BENELUX

Table 161. Frequency of watching TV in the Netherlands, 2017

Frequency	Share of respondents
Never	5%
Less than once a month	2%
Once a month	2%
Once every 2 weeks	2%
Once a week	8%
2-3 times a week	18%
4-5 days a week	12%
6-7 days a week	52%

[Source: Statista]

Generational imbalance is even more marked in Netherlands, in terms of both synthetic data and diachronic trends. Decrease rate of TV watching time has been lower among mature people, and daily time has even increased among people older than 65 [table 163].

Table 162. Daily Tv reach in The Netherlands by age group, 2019.

Class Age	Daily reach
6-12	52,3%
13-19	36,1%
20-34	56,8%
35-49	71,2%
50-64	81,4%
65+	87%

[Source: Reuters Institute for the Study of Journalism]

Table 163. Time watching TV in the Netherlands by age group, 2015-2020, minutes per day

Class Age/Year	2015	2016	2017	2018	2019	2020
6-12	190	183	178	156	156	160
13-19	90	73	60	46	42	38
20-34	140	126	116	90	79	74
35-49	177	171	165	135	136	140
50-64	256	250	247	222	222	222
65+	282	280	279	270	280	302

[Source: Nielsen]

The generational divide is also evident in table 164, with linear TV being largely used by the over 50, and the post-TV forms of consumption being very rare among them – and an impressive 0% of people aged 65+ being familiar with streaming.

Table 164. Watching TV in the Netherlands by type and by age, 2015, share of total watching time

Type/Age group	13-19	20-34	35-49	50-64	65+	All
Linear TV	55%	61%	76%	85%	94%	78%
Delayed TV	14%	16%	12%	10%	5%	11%
Streamed, downloaded or purchased	21%	18%	9%	4%	0%	8%

[Source: Elaboration on Statista data]

In Netherlands, on the other hand, no gender differences exist: according to Statista data, the average watching time is basically the same, 186 minutes per day among men, and 184 minutes among women. As to the modality of watching TV, also in this case there are no significant differences between men and women [table 165].

Table 165. Watching TV in the Netherlands by type and by gender, 2015, share of total watching time

Type/Gender	M	F
Linear TV	77%	79%
Delayed TV	10%	11%
Streamed, downloaded or purchased	9%	8%

[Source: Elaboration on Statista data]

Table 166. Frequency of Tv watching on a TV-set in Belgium, 2015

Frequency	Share of respondents
Every-day or almost TV	80%
2-3 times a week	10%
Once a week	3%
2-3 times a month	1%

[Source: EuroBarometer]

Table 167. Average time watching TV in Luxembourg, 2014-2019, minutes per day

Year	Minutes per day
2014	141
2015	160
2016	161
2017	148
2018	145
2019	145

[Source: Statista]

(4.6) Eastern Europe

Poland audiences is segmented in the most common way, with a prevalence of TV watchers among older people [tables 168 and 169].

Table 168. Tv audience structure in Poland by class age, 2020, children and teenagers excluded

Class Age	Percentage of the TV audience
25-29	3%
30-34	6%
35-39	7%
40-44	8%
45-49	8%
50-54	7%
55-59	9%
60+	43%

[Source: Nielsen]

Table 169. Daily Tv reach in Poland by age group, 2019

Class Age	Daily reach
13-29	38%
25-34	56%
16-49	59%
50+	69%

[Source: Nielsen]

What is more relevant, Poland is one of the countries in which time spent watching TV has increased in the last decade [tables 170 and 171].

Table 170. Average daily time watching TV in Poland, 2010-2020, hours and minutes per day

Year	Minutes per day
2010	4.05
2011	4.02
2012	4.03
2013	4.07
2014	4.2
2015	4.23
2016	4.21
2017	4.18
2018	4.17
2019	4.16
2020	4.20

[Source: Nielsen]

Table 171. Daily time spent watching TV in Poland by age group, 2018, minutes per day

Age group	Daily time between 6.00 and 11:00 pm, in minutes
4-9	147
10-15	102
16-19	78
20-24	85
25-29	133
30-34	174
35-39	190
40-44	228
45-49	251
50-54	272
55-59	311
60+	351

[Source: Statista]

Table 172. Reasons for watching TV in Poland, 2019

Reason	Percentage
Entertainment	59%
To learn something new	46%
To kill time	36%
To get away from current affairs	35%
To spend time with family	27%
To better understand the world	27%
To find new conversation topics	13%
To mock TV programs	9%

[Source: Statista]

Data in table 173 put on paper the effects of Covid-19 epidemic and related measures, with an impressive amount of daily time spent watching TV.

Table 173. Daily time watching TV in Poland by age group, 2018-2020, hours per day

Class Age	2018	2019	2020
10-15	1.4	1.3	5.5
16-19	1.1	0.5	3.5
20-24	1.2	1.1	4.2
25-29	2.1	2	4.4

30-34	2.5	2.5	4.5
35-39	3.1	3	4.4
40-44	3.4	3.4	5.3
45-49	4.1	4.1	5.5
50-54	4.3	4.4	6
55-59	5.1	5	6.3
60+	5.5	5.5	7.2

[Source: Statista]

The Hungarian case fits the usual scheme, with TV being widely followed, and hard watchers being concentrated among aged citizens.

Table 174. Average TV time in Hungary by class age, 2020

Class Age	Minutes per day
4-17	176
18-49	250
50+	436

[Source: Statista]

Table 175. Share of people watching Tv and on-line videos in Hungary, 2019

Modality	Share of respondents
I watch Tv and on-line videos	60%
I watch Tv but not on-line videos	29%
I watch on-line videos but not TV	8%
Didn't watch at all	3%

[Source: Statista]

Table 176. Distribution of people watching TV in Hungary by frequency, 2020

Frequency	Share of respondents
Every-day	69%
More times a week	10%
1-2 times a week	6%
Less often	7%
Never	8%

[Source: Statista]

Romania is the European country in which TV is most watched, also as a result of an impressive growth in average daily time – from 257 to 341 minutes in the 2010-2017 period - that would need a specific investigation, also based on the identification of relevant local factors [table 178].

Table 177. Average daily time spent watching TV per capita in Romania, 2014, by month

Month	Minutes per day
January	415
February	394
March	361
April	343
May	314
June	298
July	288
August	283
September	288
October	321
November	377
December	400

[Source: Zenith Consumption Forecast]

Table 178. Average daily time spent watching TV per capita in Romania, 2010-2017

Year	Minutes per day
2010	257
2011	257
2012	325
2013	340
2014	340
2015	340.3
2016	340.7
2017	341

[Source: Statista]

(4.7) The Nordics

If TV consumption has increased in Romania, it has sharply declined in the Nordics. In Denmark, for instance, daily average has drop down from 189 to 135 minutes, over the 2009-2020 time-span. Breakdown by age confirms the fidelity of aged people, as shown in tables 180, 181 and 182.

Table 179. Average daily time watching TV in Denmark, 2009-2020, minutes per day

Year	Minutes per day
2009	189
2010	201
2011	198
2012	195
2013	180
2014	173
2015	172
2016	158
2017	159
2018	142
2019	137
2020	135

[Source: Nordicom]

Table 180. Share of individuals watching traditional TV in Denmark by age, 2018

Class Age	Share of respondents
15-25	39%
26-35	50%
36-45	69%
46-55	88%
56+	96%

[Source: Audience Project]

Table 181. Audience reaching of public Tv in Denmark by age group, 2019

Class Age	Reaching
3-11	66%
12-18	56%
19-34	51%
35-54	57%
55-70	62%
71+	67%

[Source: Statista]

Table 182. Average daily time watching TV in Denmark by age group, 2008-2019, minutes per day

Age group	2018	2019
3-11	17	14
12-18	17	13

19-34	34	29
35-54	58	54
55-70	80	82
71+	90	91

[Source: Statista]

As to the gender breakdown, traditional TV is more popular among women, while on the very contrary male citizens are more familiar with TV news [though data date back to 2016, in table 184].

Table 183. Average daily time watching traditional TV and streaming videos in Denmark by gender, 2020, minutes per day

Type/Gender	M	F
Traditional TV	142	163
Streaming	58	60
Total	200	223

[Source: Statista]

Table 184. How often do you watch TV news in Denmark by gender, 2016

Frequency/Gender	M	F
Several times daily	24.5%	22.8%
Almost daily	42.2%	40.5%
Once a week	12.9%	13.8%
Once a month	6.2%	8.4%
3-4 times a year	3.4%	3.7%
Once every 6 months	2.2%	2.3%
Less than once every 6 months	3.1%	3.4%
Never	5.4%	5.2%

[Source: Statista]

In the Finnish case, the age also plays a main part in determining media consumption, even though TV seems overall to be more resilient than in Denmark, with a small decrease in daily average (-5 minutes) over the last decade.

Table 185. Average daily TV watching time in Finland, 2010-2020, minutes per day

Year	Average minutes per day
------	-------------------------

2010	172
2011	172
2012	175
2013	174
2014	176
2015	171
2016	172
2017	168
2018	165
2019	162
2020	167

[Source: Statista]

Table 186. Daily time watching TV in Finland, 2019, share of respondents

Frequency	Share of respondents
Less than 1 hour	58%
1 to 1,5 hours	17%
1,5 to 2 hours	13%
More than 2 hours	12%

[Source: Statista]

Table 187. Daily and weekly reach of TV in Finland by age group, 2017

Age group	Daily reach	Weekly reach
4-14	47%	82%
15-24	35%	67%
25-44	66%	91%
45-64	80%	96%
65+	88%	97%

[Source: Nordicom]

On the other hand, Norway is the European country showing the sharpest decline in TV consumption. The share of watchers has dropped to 48%, compared to 80% in 2009; and daily exposure has almost halved – from 148 to 78 minutes, on average. What is more familiar, in Finland too aged people are way more used to watch television.

Table 188. Share of population watching TV daily in Norway, 2009-2020

Year	Share of population
2009	80%
2010	82%

2011	81%
2012	77%
2013	74%
2014	74%
2015	76%
2016	76%
2017	62%
2018	62%
2019	48%
2020	48%

[Source: Statista]

Table 189. Average daily time watching TV in Norway, 2009-2019, minutes per day

Year	Minutes per day
2009	148
2010	152
2011	157
2012	134
2013	132
2014	132
2015	107
2016	112
2017	104
2018	98
2019	78

[Source: Statista]

Table 190. Population watching TV daily in Norway by age group, 2019

Age group	Percentage of daily users
9-15	38%
16-24	27%
25-44	37%
45-66	61%
67-79	78%

[Source: Statista]

Table 191. Share of individuals watching TV in Norway by age, 2020, share of respondents

Age group	Share
9-12	32%
13-15	22%
16-19	23%
20-24	24%
25-34	22%
35-44	30%
45-54	42%
55-66	66%
67-79	68%

[Source: Nordicom]

Table 192. Average daily time watching TV in Norway by gender, 2009-2019, minutes per day

Year	M	F
2009	151	145
2010	152	151
2011	150	165
2012	134	135
2013	138	126
2014	128	137
2015	101	113
2016	116	108
2017	104	103
2018	98	99
2019	81	75

[Source: Nordicom]

Swedish TV audiences define a different trend, with no decrease in the overall share of watchers – in actuality, a small increase from 83% to 84% of the population, in the 2019-2020 period. A more significant change is visible in consumption habits, with daily average dropping down from 166 to 129 minutes. This is probably due to the diffusion of other platforms and services, as revealed by the 10% decrease in the Tv share of the overall time spent with the media [table 195].

Table 193. Share of individuals who have watched TV daily in Sweden, 2009-2020, share of respondents

Year	Share
2009	83%
2010	86%
2011	85%

2012	83%
2013	83%
2014	82%
2015	80%
2016	81%
2017	81%
2018	82%
2019	81%
2020	84%

[Source: Nordicom]

Table 194. Average daily time watching TV in Sweden, 2010-2020, minutes per day

Year	Minutes per day
2010	166
2011	162
2012	164
2013	159
2014	153
2015	155
2016	148
2017	140
2018	133
2019	127
2020	129

[Source: Statista]

Table 195. Daily time spent on traditional TV in Sweden, 2009-2020, share of time spent with media

Year	Share of time spent with media
2009	27%
2010	27%
2011	26%
2012	26%
2013	25%
2014	28%
2015	23%
2016	22%
2017	20%
2018	20%
2019	19%

2020	17%
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[Source: Nordicom]

Also in Sweden, as it is expected, TV watchers are concentrated in the older generations, and particularly in the 65-85 age group. Breakdown by gender shows no differences between men and women in terms of daily reach [table 198], while the average daily exposure is constantly longer in female citizens [table 199]. At all levels, Swedish TV audiences seem to be characterized by huge differences in their *qualitative* ways of approaching the media, more than by a sharp separation between users and non-users.

Table 196. Share of individuals daily watching TV in Sweden by age, 2020

Age group	Share of respondents
9-14	79%
15-24	77%
25-44	80%
45-64	88%
65-85	94%

[Source: Nordicom]

Table 197. Average daily TV reach in Sweden by age, 2019-2020

Age group	2019	2020
3-14	37%	34%
15-24	23%	20%
25-39	44%	42%
40-59	64%	63%
60+	83%	85%

[Source: Statista]

Table 198. Average daily TV reach in Sweden by gender, 2019-2020

Gender/Year	2019	2020
M	54%	53%
F	58%	58%

[Source: Statista]

Table 199. Average daily time watching Tv in Sweden by gender, 2009-2020, daily minutes

Year	M	F
2009	160	172
2010	158	174
2011	152	172

2012	155	172
2013	152	166
2014	146	160
2015	148	162
2016	142	155
2017	133	147
2018	125	140
2019	120	135
220	119	140

[Source: Statista]

(4.8) Other countries

Table 200. Average TV watching in German-speaking Switzerland, 2013-2020

Year	Minutes per day
2013	129
2014	128
2015	124
2016	124
2017	121
2018	118
2019	112
220	119

[Source: Statista]

A relevant statistic comes from Germany, where daily TV watching has significantly increased in the last 25 years, from 183 to 220 minutes per day – which is the more surprising, when one considers that these decades have witnessed the diffusion of endless new devices, platforms and services.

Table 201. Average TV watching in Germany, 1997-2020

Year	Minutes per day
1997	183
1998	188
1999	185
2000	190
2001	192

2002	201
2003	203
2004	210
2005	211
2006	212
2007	208
2008	207
2009	212
2010	223
2011	225
2012	222
2013	221
2014	221
2015	223
2016	223
2017	221
2018	217
2019	211
2020	220

[Source: Statista]

Table 202. Average daily time watching TV in Germany by age group, 2019-2020, minutes per day

Age group/Year	2019	2010
3-13	58	50
14-29	82	75
30-49	176	181
50+	318	335

[Source: Elaboration on Statista data]

In the UK, TV watching reveals a moderate decline in time, with women constantly being more familiar than men with the medium.

Table 203. Average TV watching in UK, 2005-2020

Year	Minutes per day
2005	219
2006	216
2007	218
2008	224
2009	225

2010	242
2011	242
2012	241
2013	232
2014	221
2015	217
2016	212
2017	203
2018	192
2019	183
2020	192

[Source: Statista]

Table 204. Average TV watching in UK by gender, 2005-2020, minutes per day

Year	F	M
2010	259	224
2011	258	225
2012	255	226
2013	247	216
2014	235	206
2015	232	200
2016	227	196
2017	220	185
2018	207	177
2019	196	170
2020	206	178

[Source: Statista]

(5) Web and social media

In both scientific and public discourse, the idea goes that social media are a *lean* platform – a system within the system, with no discontinuities and inhomogeneities allowed. In actuality, social media users have constantly increased, in Europe, with around 57% of the overall population reached in 2020 [Eurostat data]. A closer look to the dynamics of their diffusion, though, may unravel some relevant sub-trends.

Table 205. General data on web and social media, 2021

Country	Internet Users	Social Media users	Mobile % on social media users	Facebook Users	YouTube users	Instagram Users	Twitter users	Snapchat users
AT	89%	79,9%	96,4%	45,6%	84,9%	38%	6,4%	22,2%
BE	91%	76%	96,1%	69,7%	81,6%	45,4%	10,3%	32,8%
BU	71%	62,1%	96,9%	62,8%	62,9%	26,4%	3,3%	11,6%
CY	86,1%	82,5%	98,3%	82,8%	NA	64,5%	9,6%	NA
CZ	88%	69%	94,6%	56,2%	73,7%	32,4%	6,1%	10,2%
DE	94%	78,7%	96%	39,4%	82,5%	35,3%	7,9%	20,8%
DK	98,1%	83,6%	96,8%	78,1%	90,2%	50%	10%	51%
EE	91%	74,4%	94,4%	61,6%	79,7%	38,7%	6,9%	NA
ES	91%	80%	97,7%	53,6%	84,8%	51,1%	18,3%	10%
FI	95%	80,4%	95,8%	58,4%	85,7%	48%	11,7%	29,2%
FR	91%	75,9%	96,1%	59,5%	84%	43,3%	14,4%	44,2%
GR	83%	73,5%	94,7%	71%	78%	29,6%	3,3%	16%
HR	80%	68,4%	97,4%	50,2%	70,5%	36,3%	3,6%	14,6%
IE	91%	76,4%	98,2%	66,2%	85,1%	54%	26,9%	47,8%
IT	83,7%	67,9%	98,2%	57,6%	66,9%	46,5%	5,2%	6,5%
LT	82,2%	75,4%	96,6%	72,9%	78,3%	33%	4,9%	17,7%
LV	88,9%	73,5%	95,1%	57,9%	78,3%	38%	6,4%	NA
NL	96%	88%	96,6%	61,3%	92,5%	51,2%	21,2%	39%
PL	84,5%	68,5%	96,6%	54,8%	72,9%	28%	4,1%	14,9%
PT	84,2%	76,6%	96,9%	69,9%	71,2%	53%	12,1%	12,1%
RO	80,7%	62,6%	98,1%	66,1%	64,3%	30%	4%	14,1%
SI	84%	69,8%	96%	55,4%	74,2%	34,3%	5,5%	22%
SE	98%	82,1%	97,5%	73,5%	90,1%	66,5%	13,4%	47,8%
SK	85%	73,8%	95,9%	57,2%	78,4%	29,6%	3%	9,8%
TR	77,7%	70,8%	98,5%	56,5%	64,9%	68,4%	20,2%	16,5%
UK	96%	77,9%	97,5%	66%	84%	53,8%	28,6%	36,6%

[Source: Elaboration on We Are Social, Data Reportal, and ITU data]

Table 205 offers the opportunity of a broader reflection on a main question beneath the EUMEPLAT project – how many *Europe* are there? Europe can be one, Franco Moretti wrote some time ago, if we follow Ernst Curtius' thesis on the legacy of Latin Middle Age; or it can be made of a plurality of different entities, so that there would be as many Europe as there are national states [Moretti 1994]. Or, and this would be Moretti's position, Europe has to be framed, time after time, by the specific geo-cultural pattern defined by each media market; by each cultural form; and therefore, by each *force* shaping that specific form. And so, how many Europe are we facing? Is technological innovation really fostering the unprecedented *homogenization* process, often referred to in literature?

Let's consider the internal variance of the various statistical categories. In the diffusion of the Web, the maximum is the Danish 98.1%, and the minimum is a 71% in Bulgaria. Here Europe is divided basically into *two* parts, as in the digital divide schematizations: innovators and laggards, at least in the classical version [Norris 2001, 71-79]. The same can be told for social media users, with a minimum of 62% - in Bulgaria again – and a peak in Netherlands [88% of the population].

Alternative patterns are clearly visible also in the attitudes related to social media. Facebook users range from 45.6% of the population in Austria to 82.8% in Cyprus; Instagram users, from 26.4% in Bulgaria up to 68% in Turkey [while the maximum in the EU is 66.5% in Sweden]; Twitter users, from 3% in Slovakia to 26.9% in Ireland; Snapchat users, from 6.5% in Italy to 47.8% in Ireland. Even the diffusion of YouTube, which is allegedly *the* universal platform for visual culture, varies from a minimum of 62.9% in Bulgaria to a peak of 90.2% in Denmark.

There is rather *one* Europe, definitely unified, if we look at the use of mobile phone – the most successful medium in the history of civilization. In our case, we can consider the percentage of mobile users on social media users: and once again, the continent happens to be unified by the very same cultural habit. The minimum is 94.6% in Czechia and the maximum is 98.3% in Cyprus, and this unconventional geographical continuum comes as a confirmation of the overall homogeneity.

The breakdown by gender, synthetized in table 206, also reveals something productive. All in all, there are no relevant differences in the cases of YouTube and Facebook; Instagram and Snapchat are more popular among women; while Twitter is mostly a platform for men. A very few exceptions appear to the rule: Estonia, for instance, is the sole country in which Twitter is mostly used by female citizens, while in Spain Snapchat is more popular among men. As it is often the case, the main anomaly takes its shape at the borders of the system, in Turkey: where Facebook and even Instagram are more used by men, and women take the lead only in the use of Snapchat. Which kind of division of labor among the platforms is in place in Turkey – and which informal negotiation among social players – would be a most interesting research question.

Table 206. Gender differences in the adoption of main social media, 2021 [age 13+]

Country	Facebook		YouTube		Instagram		Twitter		Snapchat	
	F	M	F	M	F	M	F	M	F	M
AT	50	50	50.2	49.8	53.3	46.7	21.1	78.9	54.9	44.5
BE	50.7	49.3	50.1	49.9	55.3	44.7	25.3	74.7	53.9	45.6
BU	50	50	51	49	54.4	45.6	24.5	75.5	66.3	32
CY	47.6	52.4	NA	NA	51.5	48.5	19.6	80.4	NA	NA
CZ	51.9	48.1	49.1	50.9	54.8	45.2	22.1	77.9	63.6	35.3
DE	50	50	48.3	51.7	51.9	48.1	18.4	81.6	59.2	39.8
DK	52.6	47.4	50.2	49.8	60	40	21.7	78.3	54.4	45.3
EE	55.7	44.3	52.5	47.5	61.4	38.6	23.4	76.6	NA	NA
ES	54.5	45.5	50.3	49.7	53.7	46.3	74.3	24.8	37.2	62.8
FI	55.6	44.4	50.6	49.4	57.3	42.7	25.7	74.3	54.3	45.3
FR	51.5	48.5	50.1	49.9	54.2	45.8	33.5	66.5	53.5	47.5
GR	53.3	46.7	50.5	49.5	53.8	46.2	20.5	79.5	62	36.7
HR	50.3	49.7	48.7	51.3	54.2	45.8	22.1	77.9	59.7	39.6
IE	55.6	44.4	50.8	49.2	58.3	41.7	40.9	59.1	53.8	45.5
IT	50	50	48.7	51.3	53.8	46.2	33.7	66.3	73.2	25.5
LT	55.2	44.8	55.2	47.8	59	41	20	80	59.2	40.1
LV	56.5	43.5	54.3	45.7	58.1	41.9	23	77	NA	NA

NL	53.3	46.7	50.3	49.7	55.1	44.9	26.5	73.5	56.1	42.9
PL	53.3	46.7	50.2	49.8	59.1	40.9	28.1	71.9	58.5	40.9
PT	52.4	47.6	49.7	50.3	54.2	45.8	32.8	67.2	66.7	32.6
SE	50.8	49.2	49.7	50.3	56.9	43.1	21.5	78.5	53.2	46.3
SI	49.5	50.5	49.3	50.7	52.4	47.6	27.2	72.8	52.1	47.4
SK	51.9	48.1	50.4	49.6	54.3	45.7	17.8	82.2	61.6	37.1
RO	50.5	49.5	48.6	51.4	53.1	46.9	20.4	79.6	63.6	35.1
TR	43.2	65.8	49.2	50.8	42.2	57.8	13.4	86.6	68.9	29.3
UK	52.6	47.4	49.6	50.4	58.6	41.4	39.9	60.1	55.8	43.5

[Source: Elaboration on DataReportal and We Are Social data]

The most impressive tendency is depicted in table 207. Even though automated analysis will provide a better understanding, it is already clear that the distribution of social media use, by gender and by age group, follows everywhere a very similar rule, regardless of the overall diffusion of those services in each country. If we focus on the junctures - the intersections among the five age classes [18-24; 25-34; 45-54; 55-64; 65+], the two genders, and the 24 considered countries - data vary within a small range, and the internal variance is very low, within any sub-cluster. In other words, huge differences do affect the overall diffusion of social media, and their usage: at this level of *scale*, for some reason, differences tend to disappear, and internal distribution, independently from the absolute values, seems shaped by the same force. *How many Europe* are there in media history, we asked before - and in this case, well, there is probably only *one*. Which is the more relevant, when we consider that the main common trend we have found so far - apparently taking together Polish career women and French farmers, old Austrians and Portuguese youth – is driven by *American* platforms, and this is a most serious issue, at both the cultural and the political level.

In his seminal work on public service media, Jérôme Bourdon tells apart three forms of americanization of European TV. In the 1980s, to start with, it was all about spontaneous and informal tendencies, due to imitation tactics put in place by European broadcasters; in the 1990s, an explosive stage would be reached, due to markets deregulation and the power of global conglomerates. And finally, Bourdon opines, we witness a more elusive and “intimate” form of americanization, with people increasingly conforming to the style and modalities of reality TV [2011, 220-222]. As self-disclosure and the culture of “semi-publicness” is an important trait of continuity between late-TV and social media [Ellison & Boyd 2007; Boyd 2014], a research question would emerge, which deals with the deepest effects brought about by the penetration of digital platforms in daily life. With this respect, people’s awareness and *agency* should come to play: when structural conditions end to be the same in different contexts, awareness and engagement of people using media can pave the way to a more balanced relation between European society and global platforms. But still, how to include the sociological dimension of agency in comparative media studies is under dispute, as we will shortly discuss in the final section [Peruško, Vozab, & Čuvalo 2015; Vozab & Peruško 2018].

Table 207. Social media market share by gender and class age, 2021

Country/ Class Age	18-24		25-34		35-44		45-54		55-64		65+	
	F	M	F	M	F	M	F	M	F	M	F	M
AT	10.3	10.7	13.4	14	9.9	9.5	7.4	7	4.5	4.3	2.3	2.3
BE	9.3	8.8	11.5	11.6	9.2	9	7.8	7.2	6.2	5.2	4.8	4.2
BU	8.7	8.4	11.4	12.3	10	10	8.4	8	6.6	4.6	4.3	3
CZ	10.3	9.7	12.8	13.3	10.7	9.8	7.6	6.7	4.2	3.1	3.3	2.7
DE	9.9	11	13.7	14.8	9.6	9.6	6.9	6.7	4.5	4.3	2.1	2.2
DK	8.4	8	10.2	10.4	8.4	7.6	8.6	7.6	6.9	5.6	6.7	5.2
EE	10.1	8.9	12.6	12.6	11	9.4	8.4	6	6.2	3.3	4.4	2.1
ES	7.9	6.7	13.2	13.5	11.1	9.7	9.4	8.2	6.2	4.7	3.5	2.9
FI	9.5	9	11.2	11.2	10.4	8.7	8.2	6.3	6.3	4.4	5.3	3.8
FR	9.8	10.1	12.7	12.9	9.2	9.0	7.4	6.6	5.5	4.2	4.6	3.5
GR	9.1	8.7	11.4	12.1	10.1	9.5	8.8	7.5	6.1	4	5.3	3.6
IE	9.9	9.1	12.7	12.4	12.1	9.9	8.3	6.6	5	3.6	3.6	2.7
IT	7.8	7.8	11.1	12.1	9.2	9.2	9.5	8.5	6.4	6.2	4.0	4.5
LT	9.4	8.9	12.8	12.8	9.9	8.9	8.4	6.4	7.9	4.1	4.5	2.1
LV	9.2	9.2	13.4	12.6	10.9	9.2	8.4	6	6.7	3.4	3.9	1.8
NL	9.3	9.3	12.4	12.4	9.3	7.7	8.5	7	6.3	5	5.3	4.4
PL	11.3	10.9	13.1	12.7	11.3	9.5	6.3	5	4.4	2.8	3	2.2
PT	8.9	8.3	11.7	12	10.6	9.7	9	8	6.2	4.8	4.2	3.9
RO	9.8	9.8	12.2	12.2	9.8	9.8	8.9	8	5.2	3.9	3.3	2.5
SE	8.3	8	11.2	11.8	8.8	8.2	8.2	7.1	6.5	5.1	6.7	5.2
SI	8.8	9.6	12	13.5	11.2	10.4	7.6	7.4	5	4.4	3.2	3
SK	9.9	9.9	13.8	14.1	10.8	10.2	7.5	6	5.1	3.3	3	2.3
TR	7.3	13	13.5	20.3	8.1	11.8	4.6	7.3	2.5	4.1	1.2	2
UK	9.1	8.9	12.8	12.4	9.3	9.1	7.9	6.6	5.8	4.4	5	3.9

[Source: Elaboration on We Are Social, StatCounter and DataReportal data]

Table 208 rather deals with on-line cultural experience, and its breakdown by age. As to video consumption, youngsters of all countries use on-line streaming more than aged people, even though to a different extent (and with an impressive peak in Norway, with a 100% of users in the 16-24 age group). In the case of online news, it appears we have two different continents, to bring in again Moretti's spatial metaphor. Getting news on-line is more common among young people in twelve countries: Austria, Switzerland, Denmark, Estonia, Spain, Finland, France, Ireland, Malta, Norway, Portugal and Slovakia. The opposite is true in Bulgaria, Cyprus, Greece, Croatia, Hungary, Iceland, Italy, Latvia, Poland, Romania, Slovakia, Turkey. In other cases, the 55-74 age group very slightly overpasses the 16-24: +3% in Luxembourg, Lithuania and Czech Republic; +1% in Denmark and Sweden; while there is no difference at all in UK. While aggregate analysis will help us individuating more precise patterns, it seems that youngsters are more used to collect news on-line in the most digitized countries, by and large.

Table 208. The Web for cultural consumption by age, 2018, percentage of users in the last three months

Country/ Age Class	Online news and newspapers			Tv, video and streaming		
	16-74	16-24	55-74	16-74	16-24	55-74
AT	71	78	60	76	97	55
BU	74	59	78	47	63	29
CH	79	79	71	NA	NA	NA
CY	80	69	85	83	96	64
CZ	91	88	91	61	87	35
DE	74	67	68	74	93	52
DK	86	89	79	87	99	70
EE	90	92	87	74	94	54
ES	77	78	71	82	95	66
FI	90	89	84	90	99	78
FR	61	66	56	63	92	41
GR	87	79	90	62	94	35
HR	91	86	92	85	96	66
HU	85	81	88	64	83	42
IE	65	68	59	74	95	45
IS	95	89	93	91	98	79
IT	56	50	58	72	89	54
LT	93	89	93	80	92	63
LU	88	82	85	53	70	34
LV	84	78	85	70	90	47
MT	83	86	78	76	91	62
NO	93	93	90	89	100	70
PL	79	75	78	64	85	41
PT	80	83	72	62	87	38
RO	69	59	70	26	36	15
SE	88	82	83	88	98	78
SK	77	71	79	45	63	26
SL	77	80	74	78	95	57
TR	56	50	58	72	89	54
UK	68	65	65	81	92	54
EU_28	72	70	67	72	90	54

[Source: EUROSTAT Culture Statistics 2019]

Table 209 is easier to read, as the considered activities – web radio and music; downloading – are usually prerogative of young people. As it is often the case in the history of modern media, European societies is here crossed by a generational stratification, also resulting in some sort of cultural divide.

Table 209. The Web for cultural consumption by age, 2018, percentage of users in the last three months

Country/ Age Class	Web radio and music			Downloading movies and games		
	16-74	16-24	55-74	16-74	16-24	55-74
AT	50	87	22	21	40	10
BE	43	68	21	43	70	28
BU	43	79	22	22	48	7
CH	79	79	71	NA	NA	NA
CY	52	75	26	35	69	16

CZ	52	88	19	29	69	11
DE	48	84	22	38	64	21
DK	69	97	39	43	54	29
EE	65	96	39	27	57	17
ES	58	88	34	34	61	20
FI	76	96	46	40	65	25
FR	49	83	24	33	54	21
GR	72	95	47	31	66	17
HR	49	72	23	28	50	18
HU	69	94	42	40	66	22
IE	65	94	33	31	65	12
IS	91	98	55	28	45	12
IT	54	83	29	27	51	16
LT	57	87	29	28	56	13
LU	56	82	30	32	52	21
LV	47	83	22	26	54	15
MT	69	93	51	38	63	29
NL	53	83	30	47	63	34
NO	72	99	41	32	63	13
PL	56	86	27	23	49	11
PT	69	92	43	39	68	23
RO	51	75	26	33	57	15
SE	88	82	83	88	98	78
SK	54	83	26	26	52	10
SL	64	89	42	26	46	17
TR	61	78	32	35	53	18
UK	67	91	39	35	56	20
EU_28	56	86	30	33	58	20

[Source: EUROSTAT Culture Statistics 2019]

A more granular breakdown would help us understand the gender divide in on-line consumption [table 210]. If we take into account four categories and 32 countries, in all cases men are more active consumers than women, with only three exceptions. In Finland and Lithuania, men and women have exactly the same share of news consumers (respectively 90% and 93%); in Malta, women read on-line information more than men (84%, compared to 82%). Once again, different variables lead to different patterns – the generational and the gender ones.

How many geographical patterns, so? *Two* continents, in the case of the two-speed digital innovation, with the resulting divide; *two* continents, but with variable segmentations, in terms of gender differences; only *one* continent, if we consider the use of mobile phone; *dozens* of continents, if we put the emphasis on national adaptations, and regulations; *two* continents again, but this time along a transversal axis, when it comes to generational habits. Each socio-technological force gives shape to its own specific pattern, as we have discussed: the Europe of newspapers is different from that of radio, and so on. How to combine these different patterns, emerging from evidence-based assumptions, is therefore a main goal for the EUMEPLAT research project.

Table 210. The Web for cultural consumption by gender, 2018, percentage of 16-74 aged users in the last three months

	Online news and newspapers		TV and video streaming		Music and web radio		Gaming	
Country/Gender	M	F	M	F	M	F	M	F
AT	76	66	80	71	55	46	25	17
BE	65	62	64	56	46	40	47	40
BU	74	74	51	42	53	44	28	16
CH	84	74	NA	NA	NA	NA	NA	NA
CY	82	78	84	82	55	50	40	30
CZ	92	90	63	59	54	49	37	21
DE	77	70	78	69	53	42	41	34
DK	88	84	88	85	73	65	44	42
EE	91	88	80	68	67	62	31	23
ES	80	75	83	81	60	56	36	31
FI	90	90	91	89	77	74	45	34
FR	63	59	66	60	52	47	34	33
GR	89	85	64	61	72	71	34	29
HR	92	90	88	82	52	46	33	23
HU	85	86	69	58	72	67	44	35
IE	68	63	78	71	67	63	34	29
IS	96	94	92	89	82	81	34	22
IT	58	53	74	70	56	52	30	24
LT	93	93	82	77	60	55	34	23
LU	89	86	58	47	59	52	34	29
LV	85	83	74	66	51	44	32	21
MT	82	84	79	72	72	66	39	37
NL	83	76	92	88	57	49	48	46
NO	94	91	91	87	74	70	36	27
PL	80	79	67	61	58	53	29	17
PT	82	79	68	57	70	68	43	36
RO	73	66	29	22	54	47	38	28
SE	92	84	91	87	81	74	32	35
SK	78	76	48	42	58	50	29	24
SL	79	74	79	76	64	63	28	23
TR	73	61	83	78	62	60	40	29
UK	75	69	87	82	70	63	41	30
EU_28	75	70	75	69	59	53	37	30

[Source: EUROSTAT Culture Statistics 2019]

(6) Advanced patterns and research questions

The final section will focus on some more advanced, albeit less systematic attempts of identifying patterns in European media consumption. We can start by considering the average expenditures on cultural services [table 211], which reveals quite familiar tendencies. The first one is the negative correlation between the use of domestic media – TV and radio – and the attendance of concerts, movies and theatres. One exception must be noticed, though: Hungary, where a high expenditure for radio and TV (25% of the total) is mirrored by a notable 23.5% of expenditure for public spectacles. The second constant is the negative correlation between the circulation of books

and the importance of radio and TV consumption: Croatia being the exception, this time, with 33.8% of radio and TV expenditures, and 19.1% for books, compared to a 11.7% overall average. No pattern at all seems to emerge, at a first glance, in the case of newspapers and periodicals expenditures, with the highest rated countries - Finland, Netherlands, Italy, Greece, and Germany – belonging to quite separate clusters.

Table 211. Household expenditures on cultural services in Europe, 2015, % of household cultural expenses

Country/Type	Tv radio	Information equipment	Newspapers and periodicals	Books	Cinemas, theatres, concerts	Video and sound reproduction
AT	14.9	13.9	14.2	8.7	13.5	12.3
BE	14.1	14.3	15	14.5	8.9	7.8
BU	41.9	8.4	7.5	10.7	6	14.6
CY	3.1	14.4	14.1	17.4	13	15.6
CZ	28.5	11.8	12.4	9.1	11.1	1.7
DE	20	9.9	15.6	10.5	10.7	6.1
EE	8.9	17.1	13.7	9.6	19.2	14.8
ES	10.9	11.3	7.8	18	13.5	8
FI	7.6	18.2	30.4	6.8	9.2	9.4
GR	13.4	17.6	15.7	12.9	11.3	10.5
HR	33.8	7.1	11.4	19.1	11.2	6.8
HU	25	12.1	10	12.9	23.5	7
IE	31.7	9.1	12.8	7.2	13.3	6.8
IT	18.6	6.8	15.7	18.9	13.5	5.6
LT	26.7	15.7	11.7	10.2	6.7	17.6
LU	13.1	18.2	13.1	14.3	7.9	9.4
LV	20.3	14.2	17.9	7.9	14.8	10.1
MT	9.7	19.8	7.2	18.9	8.8	8.9
NL	4.4	23.1	18.3	12	10.8	5.6
PO	29.6	9.4	7.9	14.1	6	7.9
PT	9	12.2	11.8	26.9	13.1	4.9
RO	60.3	4.2	5.9	11	3.2	9.1
SE	23.6	28.1	9.4	5.5	7.2	10.5
SK	30.5	17.3	7.4	5	9.3	11
SL	30.9	10	15.4	13.5	6	5.3
TR	11.4	12.2	3.3	13.4	4.6	28.4
UK	31.5	9.1	10	5.5	8.7	8.5
EU_28	19.7	14.6	13.3	11.7	10.6	8.8

[Source: EUROSTAT Culture Statistics]

For the breakdown by social class, a few statistics are available, and they often rely on different categorizations – so that table 212 can only allow for very limited inferences. All in all, most classical correlations appear confirmed, between media usage and education, age group, income and level of urbanization. The sole unusual indication comes from the breakdown by occupation, as employed people easily consume media more than the unemployed: an anomaly that can probably be explained in terms of third variable, with no direct correlation between the two visible factors.

Table 212. The Web for cultural activities by socio-economic class in Europe, 2018, % of users in the last three months

		Online news and newspapers	Web Tv and videos	Web radio and music	Gaming
Avg__		72	72	56	33
Age	16-24	70	90	86	58
	25-74	75	75	59	33
	55-74	67	54	30	20
Gender	M	75	75	59	37
	F	70	69	53	30
Education	Lower secondary	56	66	52	39
	Upper secondary	71	69	53	34
	Tertiary	85	81	63	29
Household income	Quartile 1	68	66	51	34
	Quartile 2	71	66	51	33
	Quartile 3	74	73	59	35
	Quartile 4	81	73	59	35
Urbanization	Rural	70	66	53	30
	Town	71	72	55	34
	City	76	75	59	35
Occupation	Employed	75	74	59	32
	Unemployed	66	72	55	37
	Students	74	90	87	59
	Inactive	65	56	35	25

[Source: EUROSTAT Culture Statistics]

Peruško, Vozab, and Čuvalo are perhaps to be credited with the most ambitious attempt of defining advanced clusters in European media systems, with attention placed on consumption

activities and people's agency. The idea is that of verifying whether the structural organization of media markets also reflects in terms of daily practices; and that idea has already been put to the test of two different studies. In the first one, the authors group European countries according to structural variables, largely obtained by operationalizing Hallin and Mancini's categories, though with some original findings [table 202].

Table 213. Media systems according to structural variables

Dimensions/Countries	South & East model	European mainstream model	Scandinavian model
	Greece, Spain, Lithuania, Croatia, Hungary, Italy, Romania, Bulgaria	Austria, Poland, Belgium, Estonia, Czechia, Germany, France, Slovenia, Ireland, UK, Portugal, Slovakia	Finland, Denmark, Sweden, Netherlands
Public TV and role of the State	Lower to medium level	Not a distinguishing factor	High quality
Newspaper circulation	Low	Not a distinguishing factor	High
Party influence	High	Middle	Low
Owner influence	High	Middle	Low
Professionalization of journalism	Low	Middle	High

[Source: Peruško, Vozab, and Čuvalo 2013]

Table 214. European countries according to media use

Media use/Countries	Southern model	Northern model
	Hungary, Croatia, Czechia, Spain, Italy, France, Poland, Greece, Romania, Portugal, Bulgaria	UK, Lithuania, Estonia, Belgium, Germany, Austria, Slovenia, Finland, Slovakia, Ireland, Netherlands, Sweden, Denmark
TV	Not a distinguishing factor	Not a distinguishing factor
Radio	Low use	High use
Printed newspapers	Low use	High use
Internet	Low use	High use
Social media	Low use	High use

[Source: Peruško, Vozab, and Čuvalo 2013]

From *three* clusters related to structural conditions, to the *two* clusters determined by consumption habits – so that, once again, each level of the analysis ends up revealing its own

spatial pattern. With the same intention and by following the same method, Peruško, Vozab, and Čuvalo lately sorted out European countries according to the state of innovation and inclusiveness of their media systems [table 215]. As one can see, the clusters partially overlap with Mancini and Hallin's systems: more precisely, the authors assume the similarity between Eastern and Southern Europe, which is a possible integration to the original model [Jakubowicz 2008; Wyka 2008; Dobek-Ostrowska 2012; Örnebring 2012; see also Mancini & Hallin 2013-18-20]. While cluster 2 mostly includes countries belonging to the Democratic Corporatist model, Scandinavian countries group together, due to both structural affinities and mutual cooperation, which are usually overlooked in comparative media studies [i.e., Allern & Pollack 2017].

Table 215. Advanced clusters in media systems

Cluster	Countries	Main characteristics
1	Bulgaria, Croatia, Czech Republic, Greece, Hungary, Poland, Portugal, Romania, Slovenia, Slovakia	Lower inclusiveness and globalization; less developed ICT sector and creative economy; higher TV concentration
2	Austria, Belgium, France, Germany, Ireland, Italy, Netherlands, Spain, UK	High inclusiveness and globalization; highly to moderately developed digital market; low TV concentration; open creative economy
3	Denmark, Finland, Sweden	High inclusiveness and globalization; developed digital market; low TV concentration; moderately open creative economy
4	Israel	Lower inclusiveness, lower globalization; developed digital media sector; highest TV concentration

[Source: Peruško, Vozab, and Čuvalo 2015]

For assessing the effects of structural arrangements on people's *agency*, then, the authors compare the previous clusters with those resulting from the measurement of people's watching and reading habits in eight selected countries, as shown in table 216.

Table 216. Clusters of countries by media use, minutes per day

		Tv set	Tv on computer and mobile	Printed newspapers	Internet news sites
Cluster 1	Portugal	104.7	47.1	15.8	22.2
	Hungary	121.7	13	16.1	33.5
	Croatia	157.1	22.3	20	49.9
	Poland	122.4	28.2	21.3	24.5

Cluster 2	Belgium	157.5	5.5	23.9	18.7
	Germany	142.3	58.7	19.4	11.4
	Italy	107.1	17.3	16.2	21.1
Cluster 3	Denmark	132.2	49.4	14.8	14.4
Cluster 4	Israel	88.5	41.2	17.9	27

[Source: Peruško, Vozab, and Čuvalo 2015]

According to the authors, correspondences between the two patterns are particularly evident in the case of TV watching and on-line news, and this would be enough to assume that structure *does* affect agency, in the case of media systems [Peruško, Vozab, and Čuvalo 2015, 357]. Even though the correlation is not perfect – and perhaps and not always as clear as stated by the authors - this approach is probably the most promising for coming to terms with the twofold meaning of Europeanization, at least for what concerns quantitative studies. Working on the dimension of agency, in other words, is key to identifying possible forms of Europeanization from below, able to complement the top-down strategies of cultural unification, or EU-ization.

A different research question lies behind the table 217, which synthetizes a study realized on a sample of 3,609 individuals in Belgium, Croatia, Germany, Denmark, Hungary, Israel, Italy, Poland, and Portugal.

Table 217. Media consumption by device among European youngsters: “minutes yesterday”, mean value

Activity /Age group	14-18	19-24	25-39
Tv on a tv set	82	94	108
Tv on a computer	49	46	34
Tv on a mobile phone	21	10	4
Radio on a radio set	27	40	63
Radio on computer	12	23	25
Radio on mobile phone	8	8	6
Printed newspapers or magazines	12	13	12
On-line newspapers or magazines	19	31	24

[Source: Pacheco & others 2017]

As this document aims at suggesting possible hypotheses for the later stages of the project, one can notice that these data are not simply *numbers*, accounting for the quantitative measurement of the audiences – they rather imply a *qualitative* dimension, as the use of portable devices is expected to change the relation between the people and their environment. In this very perspective, a study realized in nine European countries tried to identify precise *spatial* patterns in media consumption [Vittadini & others 2015]. Based on this, the authors group media users based on *where* they mostly access information, so as to isolate five categories: *flexible* people, using the media almost everywhere but in particular in public transportation; *ubiquitous*, which by definition

deal with the media in any possible place; *hardworking*, mostly doing so at the workplace; *secretive*, which privilege private spaces and especially the bedroom; and *homebodies*, which finally prefer their living room. The media diet of the different categories is schematized in table 218.

Table 218. Spatial patterns of media audiences, minutes per day, 2015

Medium/Type	Flexible	Ubiquitous	Hardworking	Secretive	Homebodies	Mean
TV	130	119	117	131	155	130
Radio	72	76	103	58	88	80
Newspapers	17	21	17	17	22	19
Books	27	32	23	27	26	27
Tv at the PC	23	41	24	32	20	28
Tv on mobile	3	9	3	4	2	4
Radio at PC	20	36	31	20	10	23
Radio mobile	7	11	5	5	2	6
News online	29	32	26	25	19	26
E-book	6	10	5	7	4	6

[Spurce: Vittadini & others, 2015]

For some reason, empirical evidence reveals how unequally those categories are represented in the nine countries – so that we find more *hardworking* practices in Belgium, for instance, and more *secretive* attitudes in Italy [table 219]. Even though these data do not allow for any generalization, they indicate an original and interesting perspective: countries can cluster in disparate ways, according to the selected variables. Which geo-cultural pattern is defined by a specific media practice, and how all of them would merge into a common European space – in short, this might be the very definition of comparative media studies. In this case, we can see how unsupervised analysis may reveal some different patterns – unusual, and still grounded in empirical evidence.

Table 219. Spatial media patterns by country, 2015

Country/Type	Flexible	Ubiquitous	Hardworking	Secretive	Homebodies
Belgium	+/-	-	+	-	+
Croatia	++	+	+/-	+/-	+/-
Denmark	NA	+/-	NA	-	+
Germany	NA	+/-	NA	-	+
Italy	NA	+/-	NA	+	-
Hungary	-	-	+	++	+
Poland	NA	NA	NA	+	-

Portugal	+	+	NA	+	-
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[Source: Elaboration on Vittadini & others, 2015]

A very final model is that proposed by Hasebrink & others [2015], which initially draw on a classical typology, based on the diffusion of the web in the eight considered European countries [table 220].

Table 220. Clusters of countries by Internet use

Group	Group 1: Heavy Internet use	Group 2: Medium Internet use	Group 3: Low Internet use
Countries	Denmark [90%] Germany [83%] Belgium [81%]	Croatia [71%] Poland [65%] Hungary [65%]	Italy [58%] Portugal [55%]
Media use [minutes per day]	488	556	462
On-line media use [minutes per day]	202	297	263
Relative duration of online use [% of total media use]	42%	54%	56%

[Source: Hasebrink & others 2015]

The main goal of the study, speaking of advanced patterns, is to detect the most frequent correlations among different media consumption practices. In general, for instance, correlation between on-line media and TV is “close to zero”, while a “positive correlation” does exist between the web and the press: “in other words, the more youngsters use the Internet, the more they read newspapers” [Hasebrink & others 2015, 451].

Table 221. Patterns of correlation among media uses in in four countries, 2015

	Denmark	Germany	Italy	Portugal
1	Writing/reading blogs	Writing/reading blogs, newspapers online	Writing/reading blogs, Downloading films and games	Online news, newspapers online
2	Books, newspapers, audiobooks	Audiobooks, books	Newspaper online, newspapers, e-books, audio books, online news, radio on mobile	Games, social network sites, chats

3	Online news and newspapers	Online news, Tv on mobile	Tv on mobile, online shopping, TV on computer	Tv on mobile, audio books, TV on computer
4	Chat, e-mails	Chat, SNS	TV, radio	TV, video
5	Tv on computer or mobile	Downloading films and games, video on PC	Radio on computer, music online, social network sites	Music online, radio on computer, online hobbies
6	TV, video	TV, games	Online: others	Online: others
7	Radio on computer, music online	Online shopping, music online, e-mail	--	E-mail, radio on mobile
8	Online shopping, hobbies	Online: others	--	--
9	Downloading films, games	Radio, newspapers	--	--
10	E-books,	E-books, online hobbies	--	--

[Source: Hasebrink & others 2015]

Table 221 shows the most frequent associations between media usages in four countries. Some of these correlations are quite predictable: as in the cases of writing and reading; using both on-line news and newspapers; communicating via e-mails and chat; watching Tv and listening to radio, which are arguably part of a more domestic lifestyle. In this case too, though, the importance of the model is not only in the results – rather, in the search for less conventional patterns in media consumption.

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This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101004488

