



The contemporary communications environment: Executive summary

1. Introduction

The development of a networked communications environment has implications for the exercise of the right to freedom of expression and, consequently, for democracy, access to information and culture. This paper provides contextual information for considering these issues. It draws together recent research to map out: how people access information about recent events; what sources of information they trust; and how these sources are controlled.

2. How people access news information

The sources people use depend both on their physical access to different media and, where more than one source is available, their preferences. Surveys indicate that:

- **television** is the most preferred medium throughout the world, with exceptions in some sub-Saharan African countries. Global distribution of television sets varies widely according to wealth
- **printed newspapers** are the second most popular source. Notable exceptions are some Latin American countries where radio is more preferred, and sub-Saharan Africa where radio and television are more important. Global sales of newspapers have risen in the last 5 years, owing to increases in Asia, South America and Africa, although sales have decreased in Europe, North America and Oceania
- **radio**, the third most common source of news information globally, is often the most important source in sub-Saharan Africa, and second (with newspapers) in Latin America. Following the liberalisation of broadcasting in many African countries, the number of independent radio stations has increased in the last 20 years
- **the internet** is the least popular source, except in China, Japan and South Korea. People tend to use online news sources to supplement traditional mass media rather than replace it. Global disparities in internet access are far more marked than for other media, and use is growing fastest amongst the young.

Phones are not widely used as a source of news information. Since 2002 however, there have been more mobile phone users than fixed line users in every region of the world, and growth in usage has been dramatic in less economically developed countries. Combined with the development of wireless technologies, this may have important implications for access to the internet in the future.

3. Trusted sources of information

Perhaps unsurprisingly, surveys suggest that people's levels of trust in news sources are broadly in line with sources' popularity. While levels of trust in the media are low overall, people place most trust in country-specific media. National television is the most trusted, followed by national and regional newspapers. The internet, particularly

blogs, is least trusted. There are geographical differences in levels of trust across the world, and some evidence that levels of confidence in the press and television are inversely related to the level of GDP. Younger people are more likely to value the internet or mobile sources, and trust international media more.

4. Ownership and regulation of media platforms and content

A range of different views exist about the combinations of regulatory regime and media ownership structures that can most effectively foster freedom of expression. Many analysts see global trends towards media deregulation and concentration of ownership; however there is much debate about their nature and implications.

4.1 Evidence suggests a **transnational media regime** is emerging, based on the following trends:

- deregulation of markets, leading to concentration in ownership in most regions of the world
- a tier of media conglomerates is emerging, which operate globally as countries relax restrictions on foreign ownership of media. A second tier of regional and national giants lies behind this. Media organisations now feature in indices of the worlds' largest companies
- commercial media content is becoming depoliticised
- public service media are struggling to compete with commercial media, and adopting less intellectually challenging content
- the internet is becoming more significant as a news media platform, with much online content deriving from two agencies. Governments are increasingly interested in the regulation of internet content and in user surveillance.

Within the transnational regime, this paper describes national and regional variations. Markets, regulatory regimes and politics create particular environments with distinct implications for freedom of expression.

4.2 **The Asia-Pacific region** has mostly privately-owned press and high levels of state ownership of broadcast media. It includes some of the worst-ranked countries in terms of media freedom. Trends towards state intervention in content are evident. Internet use is spreading widely in most countries, as is government regulation of its use, often in politically repressive ways: China's internet censorship system is well documented.

4.3 **Central and Eastern Europe, and Central Asia:** Following a liberalisation process after the collapse of the Soviet Empire, levels of foreign media ownership are high. Complex ownership structures and a lack of transparency make it difficult to identify control over media content. State control of media is apparent and increasing in some countries. Commentators have voiced concern over the situation for the press in Central Asia and some of the Caucasus countries.

4.4 **Latin America** has seen the development of commercial media prioritised over public service broadcasting and the consolidation of media duopolies in the larger economies (Brazil, Mexico, Venezuela). The overall trend has been from family-owned to more global corporations. Following relaxation of ownership regulation, global companies have partnered with local 'giants' and their investment boosted the production of local content. The internet is not as heavily regulated as in other regions.

4.5 **Middle East and North Africa:** Print and broadcast media are generally state owned and tightly controlled. The establishment of Al Jazeera television has increased access to transnational, largely independent news. Approaches to the internet vary in the region, from suspicion to promotion as a tool for economic growth. More liberal stances towards content in some areas may change as levels of access increase.

4.6 **North America:** In the USA all print and broadcast media are privately owned, with high levels of concentration of ownership. It is broadly agreed that media content is skewed towards the conservative right of the political spectrum. There is concern about control of media content exerted both by private corporations and by government. Since the terrorist attacks of September 11 2001, debates about surveillance have sharpened and legislation has increased governmental surveillance powers both in Canada and the USA.

4.7 In **sub-Saharan Africa**, both press and broadcast media have traditionally been tightly controlled by the state. There has been some liberalisation during the 1990s, its effects visible in the growth of independent radio stations in many countries, and South Africa is developing a public service broadcasting model. Public broadcasters tend to share content for commercial reasons, potentially reducing diversity of viewpoints. The combination of liberalisation and lack of resources for investment has led to high levels of foreign content in television broadcasts. State regulation of internet content has been increasing, and self-censorship of content is seen in countries with poor human rights records.

4.8 **Western Europe:** in many countries newspapers have been privately owned and subject to less regulation than broadcasting. State monopolies of broadcast media existed in most countries until after 1950. While trends of deregulation and concentration of ownership are visible, levels of state ownership remain high. There is a strong tradition of public service broadcasting. Internet use is relatively high, though variations in regulation have created different levels of access to internet technologies. The region has also seen increased regulation and monitoring of the internet after 9/11.

5. Conclusion

The dominant and most trusted news medium across the world is television, followed by newspapers and the radio. The internet is not currently a main source of news, but internet use across the world is increasing; its impact on other sources is not yet clear.

A transnational media regime is emerging, but its overall trend of market deregulation and increasing concentration of ownership is underlain by different regional and national patterns. This is also true for the internet, a global resource that is still subject to national regulation and control. Changes in technologies, markets and regulation are likely to take have varying effects in different countries, according to their politics and infrastructure.