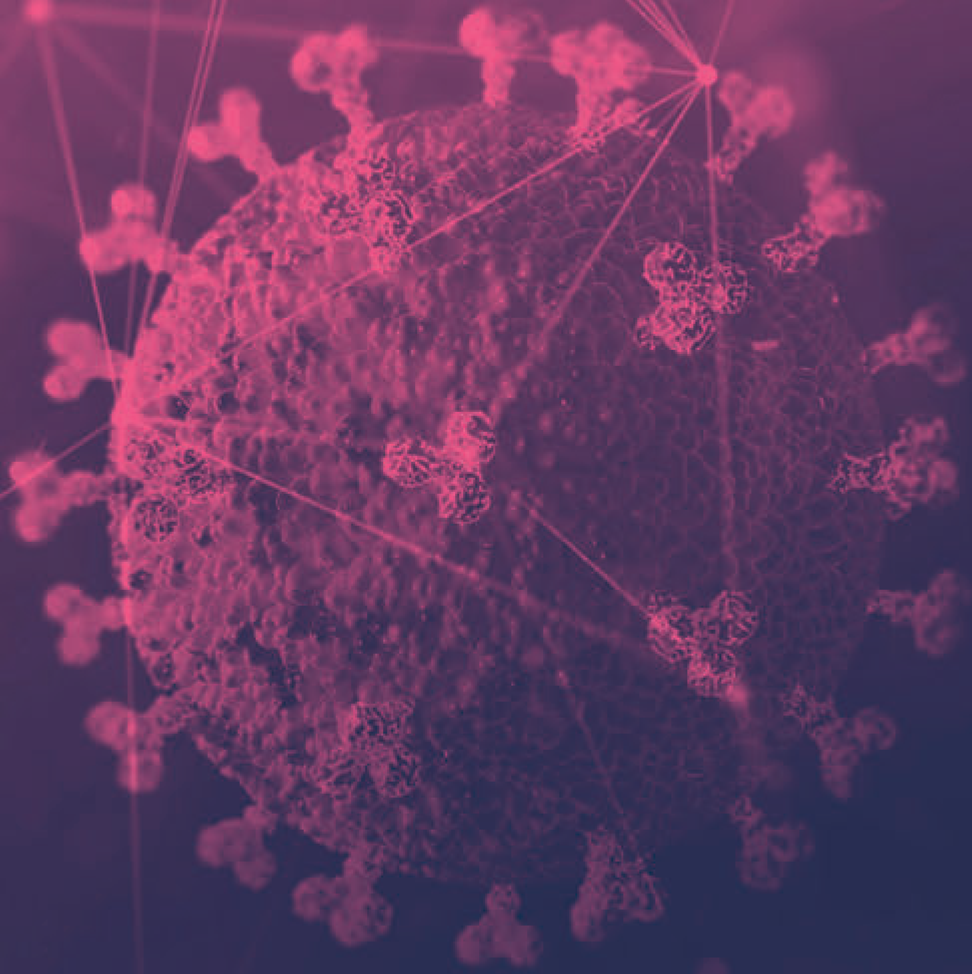
DIGITAL NEWS REPORT IRELAND 2021



Instititiúid DCU um Meáin Todhchaí, Daonlathas agus Sochaí
DCU Institute of Future Media, Democracy and Society

University of Oxford
Reuters Institute for the Study of Journalism

BAI
Údarás Craolacháin na hÉireann
Broadcasting Authority of Ireland

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Colleen Murrell, Kirsty Park,
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BROADCASTING AUTHORITY OF IRELAND

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BAI FOREWORD

Facilitating a mix of voices, opinions, and sources of news and current affairs which enhance democratic debate and active citizenship is a key objective of the BAI Strategy Statement 2021-2023. It is also key to ensuring a healthy news ecosystem in Ireland. This 2021 Digital News Report Ireland presents clear findings on how the COVID-19 pandemic has impacted Ireland's news ecosystem. It provides insights into how society has adapted to the changes and raises questions about the longer-term impact of these changes on the ways news is sourced, accessed, consumed, and funded in Ireland. It highlights the challenges, exacerbated by the pandemic, in sustaining a viable news ecosystem that serves, reflects, and embraces the diversity of Irish society. All these themes are reflected in the 2021 Report and are also being considered by the Future of Media Commission, due to report later this year on the future funding of public service content. Furthermore, the EU Commission is considering such questions in the context of its future legislative proposals to deliver its *Digital Agenda for Europe Strategy*. The BAI is contributing to these important discussions and is supporting the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media in progressing its plans for the establishment of the Media Commission which will have a key role in shaping and delivering the new media regulatory system in Ireland.

The unequal way the pandemic has impacted individuals and sectors of society is well recognised. The traditional media sector, especially at a local level, was immediately hit by the loss of commercial advertising revenue as key sectors of the economy were forced to suspend operations. While Government supports, including funding provided by the BAI, eased the impact, the critical role played by trusted media outlets in ensuring citizens had access to timely and accurate information on the pandemic, has also been acknowledged. The reliance of audiences on established trusted news brands nationally and locally for COVID-19 information is a recurring theme in this year's report. The 2021 report also highlights that the ongoing concern about online disinformation and misinformation, which has been a focus of attention for some time, has increased during the pandemic.

While the growth in people willing to pay for news is noteworthy, it will be interesting to track over time if this is sustained. In addition, the Report's findings on the link between willingness to pay and other factors, such as income, raises concern about equality of access to news. This concern is further compounded when it comes to local news, as our indigenous news outlets compete with large international players such as the Guardian and the New York Times for subscription revenue, as well as competing with Google and Facebook for advertising revenue. The pandemic has accelerated this crisis and imaginative solutions will be required if pluralism is to be sustained. While the Reuters Digital News Report does not provide solutions to all these challenges, it provides clear evidence of the challenges and the pace of change. It also points to areas where further research and analysis would be worthwhile particularly in relation to the impact on different sections of society. Data from the Digital News Report provide critical insights to guide the BAI in achieving its strategic objective of a delivering a media landscape that is representative of, and accessible to, the diversity of Irish society.

In conclusion, I wish to acknowledge the work of the Reuters team in Oxford, the FuJo staff in DCU and my colleagues in the BAI who have worked on this project this year. It is one of the most significant cross-platform content research projects running in Ireland that allows developments to be tracked annually and viewed in a global context. This would not be possible without successful collaboration. This is a value that underpins the BAI's work and the importance of which has also been highlighted by the pandemic.

Celene Craig
BAI Deputy Chief Executive
June 2021

DCU FUJO FOREWORD

Welcome to the seventh annual Irish Digital News Report which brings you the latest information and analysis regarding this county's evolving media landscape. This is part of the global Reuters Digital News Report, based at Oxford University, and is the largest ongoing comparative study of digital news consumption, taking in 46 countries.

This last year has shown us just how important a role professional news gathering plays in informing the Irish population about crucial issues related to the spread of COVID-19. Live, unedited press conferences have been delivered to the television viewing public, journalists have cross-examined the government, health and scientific leaders, and crunched the data to reveal important truths about the spread of the virus and how it can be contained.

While it is sometimes thought that reporters are superfluous, because government ministers and scientists can now speak directly to the people via multiple media platforms, our data suggest Irish consumers want to see their elected representatives and senior scientists interrogated and their policies examined by professional journalists.

In this report we check in on the areas that the report always covers – concerning Irish consumer habits and people's news sources and media devices. We revisit attitudes regarding trust in the media, interest in news and interest in politics. We ask how many subscriptions consumers are willing to pay for and what brands and social media platforms interest them. Where relevant we have compared Irish data to data from North America, the UK and the EU.

2021 has sent Irish consumers back towards trusted brands and made them more wary of disinformation and misinformation emanating from social media platforms. There has been a marked return to television news viewing, which is good news for broadcasters. On the other hand the decline in newspaper sales has continued apace as consumers avoid shops and the printed copy. Interest in the news and in politics is growing – particularly among the young.

We hope that alongside the global Digital News Report, this focused research on Irish consumers will be useful for media owners, journalists, academics, teachers and those who work in areas of media policy. We would like to thank our sponsors at the Broadcasting Authority of Ireland (BAI), our academic colleagues at the Reuters Institute for the Study of Journalism at Oxford University Rasmus Kleis, Nic Newman, and Richard Fletcher, our publishers NeoGen, as well as the International pollsters YouGov and their Irish partners Dynata.

Through the annual Digital News Report, and other major research projects, DCU's Institute for Future Media, Democracy and Society (FuJo) continues to build a critical knowledge base for the Irish media, under the directorship of Prof Jane Suiter. For more information visit: www.fujomedia.eu

Colleen Murrell
Full Professor of Journalism at DCU
and member of the FuJo Institute
June 2021

METHODOLOGY

This global study has been commissioned to understand how news is currently being consumed with a particular focus on digital news consumption and devices used to access the news. The Reuters Institute for the Study of Journalism at Oxford University has run this comparative study for ten years and this year 46 countries took part. A comprehensive online questionnaire was designed - with input from all stakeholders - to capture all aspects of online news consumption. Samples were assembled using nationally representative quotas for age, gender, region and education. The data in all markets were also weighted to targets based on census/industry accepted data.

This project is made possible with the support and work of the following organisations: the Broadcasting Authority of Ireland, Dublin City University, the Google News Initiative, BBC News, Ofcom, the Dutch Media Authority, the Media Industry Research Foundation of Finland, the Fritt Ord Foundation in Norway, The Korea Press Foundation, Edelman UK, the Hans Bredow Institute, University of Navarra, Roskilde University, University of Canberra, the Centre d'études sur les médias University of Laval, the Open Society Foundation, Fundación Gabo, University of Tampere, and the University of Bergen.

The research in Ireland is designed to understand Irish news consumers' use and value of news across a number of factors. Results here are reflective of broad consumption trends in Ireland and are not equated to the data collected by news organisations regarding their individual digital readerships.

- Research was conducted via YouGov using an online questionnaire at the end of January/ beginning of February 2021. 2,031 people were sampled in Ireland.

- It is important to remember that online samples tend to under-represent the news consumption habits of people who are older and less affluent, meaning online use is typically over-represented and traditional offline use under-represented. In this sense, it is better to think of results as representative of the online population. In Ireland internet penetration represents 92 per cent of the population.

- One should also note that online surveys rely on recall, which is often imperfect or subject to biases. We have tried to mitigate these risks through careful questionnaire design and testing. Despite other limitations, surveys are able to capture media consumption across platforms, including social media, messaging apps, and websites. They are also a good way of tracking activities and changes over time – in a consistent way.[1]

- Please bear in mind that some of our survey-based results will not match industry data, which are often based on different methodologies, such as web-tracking. The accuracy of these approaches can be high, but they are also subject to limitations.

- A fuller description of the methodology, panel partners, and a discussion of non-probability sampling techniques can be found on the Reuters Institute website along with the full questionnaire (https://reutersinstitute.politics.ox.ac.uk/).

1 From 2012 to 2020 we filtered out respondents who said that they had not consumed any news in the past month. From 2021 we included this group, which generally has lower interest in news. In previous years this group averaged around 2–3% of the starting sample in each market, meaning that the decision to include it has not affected comparative results in any significant way. Some figures have been affected by one or two points in the UK, USA, and Australia, and we have taken this into account when interpreting year-on-year change.

AUTHORSHIP AND RESEARCH ACKNOWLEDGEMENTS

Prof Colleen Murrell is a full professor in journalism at DCU's School of Communications. She teaches broadcasting and researches international newsgathering, transnational broadcasting, digital and social media and terrorism coverage. She is a former news editor who worked for a number of international news organisations including the BBC, ITN, AP, TF1, ABC and SBS.

Dr Kirsty Park is a post-doctoral researcher at DCU's Institute for Future Media, Democracy and Society (FuJo). She works on projects relating to social media, politics, deliberative democracy and disinformation. She also lectures in the School of Communications at DCU.

Dr Dave Robbins is an assistant professor of journalism in DCU's School of Communications. He worked for 25 years at senior level in national print and broadcast media. He also worked as a ministerial advisor and in local politics. Dave is the director of DCU's Centre for Climate and Society. His research focuses on media representations of climate change and on environmental communication.

Dr Dawn Wheatley is an associate professor in the School of Communications in DCU, focusing on journalism, social media, and political communication. She worked as a production journalist in national newspapers before turning to academic research and teaching. Dawn is particularly interested in sources and diversity of voices in the news, journalistic reporting practices, and audience customisation habits on social and mobile media.

We are also very grateful for the contributions and assistance provided by Deborah Molloy Bergin, Ciarán Kissane and Martina Mimnagh from the Broadcasting Authority of Ireland.

EXECUTIVE SUMMARY

This 2021 Digital News Report (DNR) is the first to reveal the effects of Coronavirus on Irish media consumers, as this year's survey was conducted in the middle of a full lockdown, whereas the 2020 survey was conducted pre-lockdowns. Most of the changes that we note here were already in train but some have sped up – such as a further move online, an increase in newspaper subscriptions for favourite brands, and a downswing in printed newspaper sales, at a national and local level. Other changes buck the trend, including that a growing number of consumers are watching set piece television news bulletins, including the young. There is evidence of a growing concern about misinformation, in particular related to the pandemic, and brought to readers via social networks, such as Facebook.

This has been a global crisis year, which has sent people searching for answers about topics they had never thought about before – daily case numbers, 'R numbers', ICU occupation, assorted vaccines and variants. In Ireland television viewers have been able to witness the 'sausage being made'. They have watched from their sofas as the lengthy press conferences unrolled and government ministers, HSE spokespeople, members of the National Public Health Emergency Team (NPHET), and assorted scientists and epidemiologists were asked questions by journalists. The public has responded in increasing numbers via Twitter and Instagram, calling on journalists to pursue particular questions and lines of inquiry.

Journalism is once again at the forefront of debate, as a healthy ecosystem of national and local news platforms is essential to keeping people informed of their individual rights and choices, alongside those of their communities. The Future of Media Commission has taken public and industry testimony about ways to put the media onto a more secure footing in Ireland. One of the most consistent challenges voiced so far has been that a couple of large tech platforms – Google and Facebook – have cornered the lion's share of the advertising spend for media.

At the back of this report, you will find six essays by experts in the media. Hugh Linehan, Arts and Culture Editor of the Irish Times analyses the changing state of news subscriptions; David Robbins examines the workings of the Future of Media Commission; and Eileen Culloty discusses how media literacy programmes can help the public to better understand the current news landscape. Colleen Murrell prods the strange lockdown phenomenon of 'appointment television news', Dawn Wheatley reflects on whether audiences feel represented in news output, and Roddy Flynn explains what a new database can tell us about media ownership in Ireland.

This 2021 report showcases Ireland's data, which form part of the larger survey which was conducted in 46 different countries. In this report we either display the Irish data alone or we show the data alongside those countries that we have used as points of comparison over the last few years, namely North America (the US and Canada), the UK and the EU 27 average. In Section One we profile Irish consumers and their interests and engagement with news and technology; Section Two details their sources and devices; Section Three examines attitudes towards trust, disinformation and paying for news; Section Four reveals new data on brands, discovery and social media and Section Five gives the data concerning changes to the media landscape wrought by COVID-19.

Here is a summary of some of the important findings from our 2021 research.

- There has been an increase of five percentage points in the categories of people who are 'extremely' or 'very interested' in news in 2021. Ireland continues to score highly in this area, particularly when compared to North America and the UK.

- Watching TV news bulletins as a main source of news is up this year, with 41 per cent of respondents reporting they use TV news as a main source of news (+8pp). RTÉ in particular has enjoyed an increase in popularity and has come out on top in the 'most trusted news brand', the 'main traditional news brand' and the 'most frequently used news brand' categories.

- Trust in the news media has increased over the past year. The number of respondents who tended to agree with the statement that "you can trust most of the news most of the time" rose from 43 per cent to 48 per cent. Another seven per cent strongly agreed, meaning that 53 per cent overall testified to positive media trust levels.

- There are high levels of trust in established brands. Eight news brands recorded trust levels of over 70 per cent. RTÉ is the most trusted source of news, with 78 per cent saying they trust the public service broadcaster. Local news sources are also highly trusted.

- Respondents show more confidence in the news sources they consume themselves than in the news in general. Most people (52% in 2020, increasing to 59% in 2021) either tend to agree or strongly agree with the statement that "I think I can trust most of the news I consume most of the time".

- Respondents are generally sceptical of news they see on social media, with 51% either disagreeing or strongly disagreeing with the statement "you can trust the news on social media most of the time".

- For Irish news consumers, COVID-19 tops the bill for false or misleading information seen in the week prior to the survey (49%).

- In answer to a question about false or misleading COVID-19 information, 38 per cent singled out Facebook as the main platform of concern, as opposed to news websites or apps (12%) or Twitter (11%). The platform needs to do more to tackle this problem, even though it has made a start this year.

- The HSE (42%), news organisations (40%) and 'scientists, doctors, or other health experts' (38%) all beat 'the national government' (36%) as chosen sources of information with regards to COVID-19.

- Irish media consumers remain very interested in politics, up two percentage points in those who are 'extremely interested' or 'very interested' (40%). When you add in the category for those who are 'somewhat interested,' this gives a total of 76 per cent who have an interest in politics. Young people (18-24) are becoming more interested in politics, with a total of 72 per cent expressing an interest in politics in 2021, (+14pp).

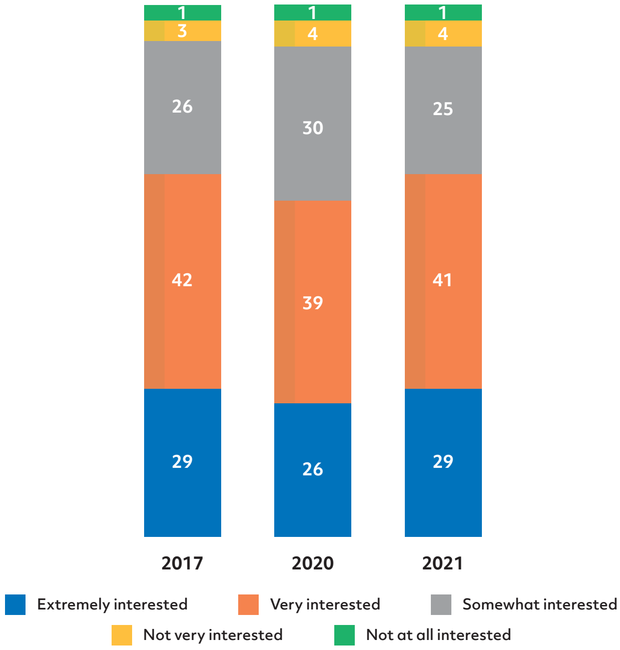
- Smartphones continue to rise in popularity as the main way of accessing news (+3pp).
- Podcast listening is still high in Ireland, although the rise has tailed off. Younger groups are more likely to choose Spotify and YouTube to access podcasts and older groups the RTÉ player.
- The number of Irish people willing to pay for news increased last year, from 12 per cent to 16 per cent. Younger people are still more likely to subscribe to news media, or to make one-off payments for access, but the number of older people willing to pay for news has increased sharply in the last year. Those on higher incomes are more likely to subscribe to a diversity of news sources.
- Irish people are more concerned about the difficulties facing the news sector than those in other jurisdictions (37%, compared to 26% in the UK, 33% in North America, and 28% in the EU). They are also keener on government support for the sector than those elsewhere, with 32 per cent in favour of the government stepping in to help news organisations.
- WhatsApp is now the most popular social platform for any use, overtaking Facebook, and is used by 69 per cent of respondents. For news specifically, Facebook has declined in popularity since last year (-4%), as has YouTube (-4%), Twitter (-1%), and Snapchat (-2%); some of this may be connected to concerns over the trustworthiness of COVID-19-related content.
- This is the first year in which we have asked respondents about how well they feel various aspects of their identity - their age, gender, ethnicity, where they live, social and economic class, and political views - are represented in Irish news media. In all categories, the majority are satisfied with both the level and fairness of coverage. However, young adults (aged 18-24) feel most unhappy: 34 per cent say their age group do not get enough coverage. Regarding regional diversity, those living in Dublin are most satisfied with coverage of their area, while there is more concern among those in the other provinces.

SECTION ONE

IRISH NEWS CONSUMERS

This section profiles Irish news consumers. News consumers are categorised according to their interest and engagement with news and technology as well as their political leaning and interests.

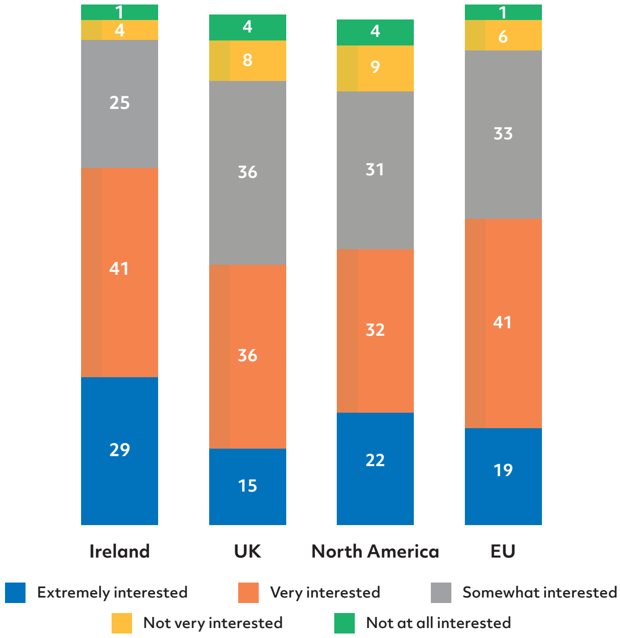
FIG 1: INTEREST IN NEWS



Q. How interested, if at all, would you say you are in news?

There has been an increase of five percentage points in the categories of people who are 'extremely' or 'very interested' in news in 2021. COVID-19 is likely to be a major contributing factor, given that the 2020 survey was conducted in January and February of that year (before the first lockdown), whereas consumers surveyed in 2021 were in their third lockdown in Ireland by the same time this year. However, when compared to 2017 it is perhaps not as dramatic a shift as one might have expected.

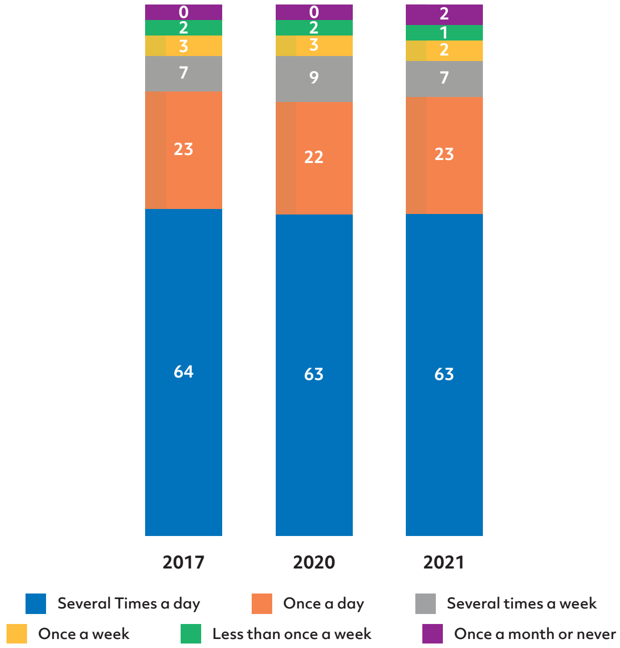
FIG 2: INTEREST IN NEWS INTERNATIONAL COMPARISON



Q. How interested, if at all, would you say you are in news?

Ireland's 2021 figures for those who are 'extremely' or 'very interested' in news are higher than the EU average, North America and the UK. Over the past five years Ireland has scored consistently highly in these news categories. Perhaps not surprisingly, interest in the news in North America has shown a marked dip in the last year, possibly reflecting that President Joe Biden excites less interest from the American public than did former President Donald Trump who led the news cycle most days. This may mean the "Trump Bump" is over with regards to news interest. According to the global Digital News Report, a number of other countries have seen a considerable drop in the 'extremely interested' and 'very interested' categories since 2016, with a 17 percentage point drop in Spain, 12 points in Italy and Australia and eight in France, Japan and Norway. NB Due to Brexit, the UK is no longer included inside the EU figures (in this and all other report charts), as it was in previous years.

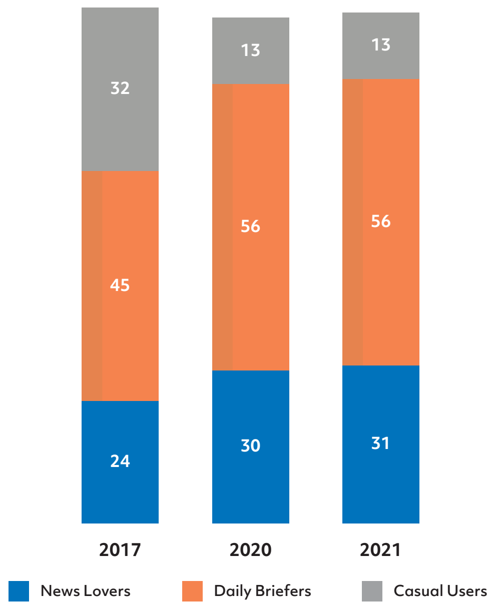
FIG 3: FREQUENCY OF ACCESS NEWS



Q. Typically, how often do you access news? By 'news' we mean national, international, regional/local news and other topical events accessed via any platform (radio, TV, newspaper or online).

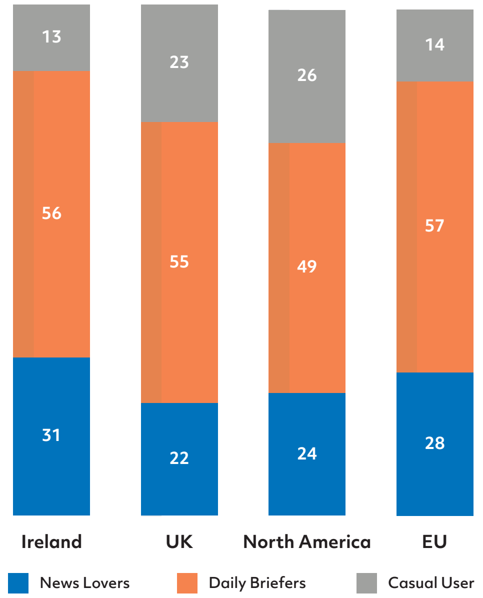
In 2016, only 53 per cent of consumers in Ireland accessed news 'several times a day'. This jumped to 64 per cent in 2017 and has since stayed largely the same. This means that 86 per cent of Irish consumers access news at least once a day. While one would expect COVID-19 to have made a bigger difference to 'frequency of access to news' it is also possible that people are limiting their access for mental health reasons or due to the sheer amount of news there has been on the one topic for such a lengthy amount of time. NB A new category of 'once a month or never' was formerly a 'screen out' question.

FIG 4: CONCEPTUAL GROUPS



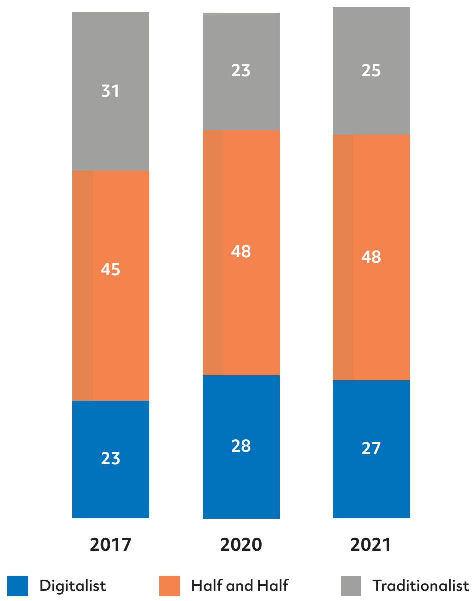
We divide news consumers into three conceptual groups based on their interest in and frequency of accessing news. 'News lovers' are those who indicate that they are extremely interested in news and access it more than five times per day. 'Daily briefers' access news less than five times a day but are very or extremely interested in news content. 'Casual users' access news once a day or less and are somewhat interested in news. This chart shows there has been consistent high engagement with news over time, but barely any movement between groups can be seen during the past pandemic year.

FIG 5: CONCEPTUAL GROUPS INTERNATIONAL COMPARISON



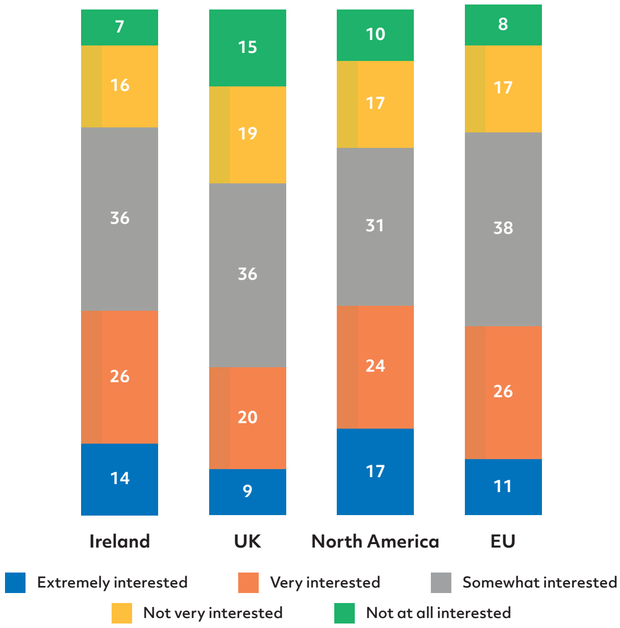
Ireland has the highest number of 'news lovers' in this comparison at 31 per cent (up one percentage point). The UK has the lowest number of 'news lovers' at 22 per cent, and North America sees a decrease in 'news lovers' (-6pp). The EU average for 'news lovers' is up one percentage point. In North America the number of 'casual users' went up four points.

FIG 6: CONCEPTUAL GROUPS



Another conceptual category for understanding news consumers is whether they are 'traditionalists', who consume news mostly through traditional means such as newspapers, radio and TV; 'digitalists', who consume news mostly from digital sources such as smartphones, tablets and computers or "half and half" who migrate easily backwards and forwards between the two. Irish 'traditionalist' numbers have been slowly shrinking, from 31 per cent in 2017 to 23 per cent in 2020. In 2021 the number is up two points, possibly because in lockdowns people have been listening or viewing more broadcast journalism.

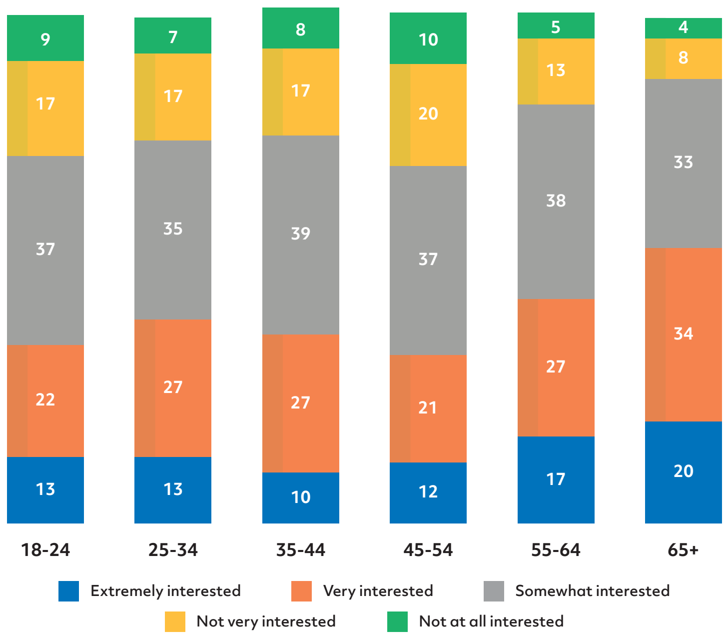
FIG 7: INTEREST IN POLITICS INTERNATIONAL COMPARISON



Q. How interested, if at all, would you say you are in politics?

Ireland has shown a similar interest in politics over the past six years, with a two percentage point rise this year in the combined groups of 'extremely interested' and 'very interested' at 40 per cent. Only seven per cent declare themselves to be 'not at all interested.' The 'somewhat interested' category remains large at 36 per cent, down just one percentage point from 2020. Overall this means that 76 per cent of those surveyed in Ireland are interested in politics. North America has seen a drop of 11 percentage points in the 'extremely interested' and 'very interested' in politics categories. This is similar to the North American drop in interest in news. This can be partly explained by the long tenure of Prime Minister Trudeau in Canada, who has been in power since 2015, and the handover from former President Trump to the less dramatic government of President Biden in the US.

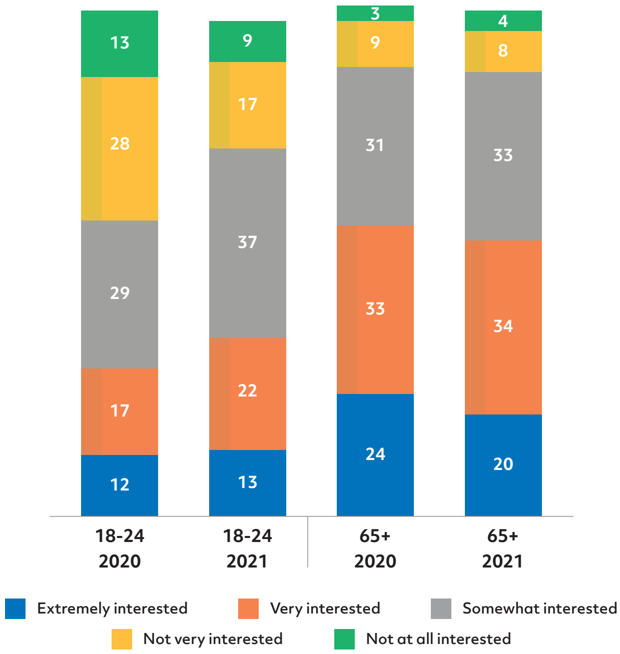
FIG 8: INTEREST IN POLITICS BY AGE



Q. How interested, if at all, would you say you are in politics?

While older age groups are generally more interested in politics than younger ones, there is nonetheless an interesting change happening in the younger generation. 72 per cent of young people, (aged 18-24), consider themselves to be 'extremely', 'very' or 'somewhat interested in politics'. This figure is up 14 percentage points from 2020, which saw a general election, prolonged wrangling to form a coalition government and the arrival of COVID-19. Young people have seen massive changes to their lives through lockdowns, and appear to have consequently taken more interest in politics and political decisions that affect their lives. There is less change in the other age groups evident here.

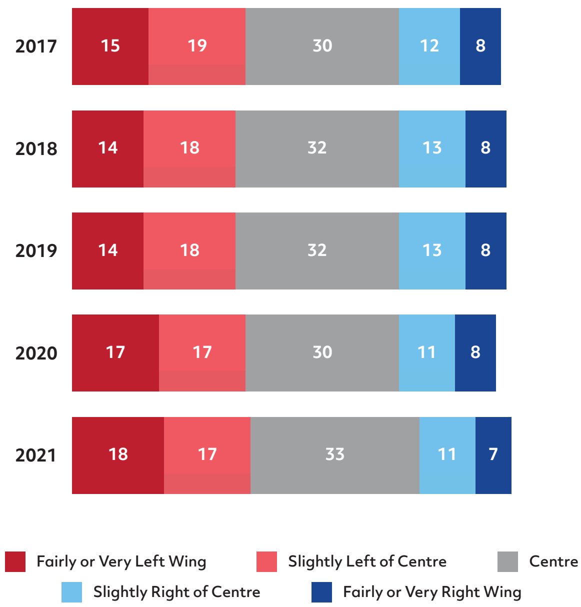
FIG 9: INTEREST IN POLITICS BY SELECTED AGE GROUPS AND YEAR



Q. How interested, if at all, would you say you are in politics?

When contrasting the youngest respondents with the oldest ones, it is clear that the latter are still the keenest on politics but with only minor changes between the categories of interest compared to 2020. In the categories of extremely, very or somewhat interested in politics, the over 65s total 87 per cent, a drop of one percentage point from last year in contrast to the 14 percentage point increase seen among 18-24 year olds.

FIG 10: POLITICAL LEANING OF IRISH SURVEY BY YEAR



Q. Some people talk about 'left', 'right' and 'centre' to describe parties and politicians. (Generally, socialist parties would be considered 'left wing' whilst conservative parties would be considered 'right wing'). With this in mind, where would you place yourself on the following scale?

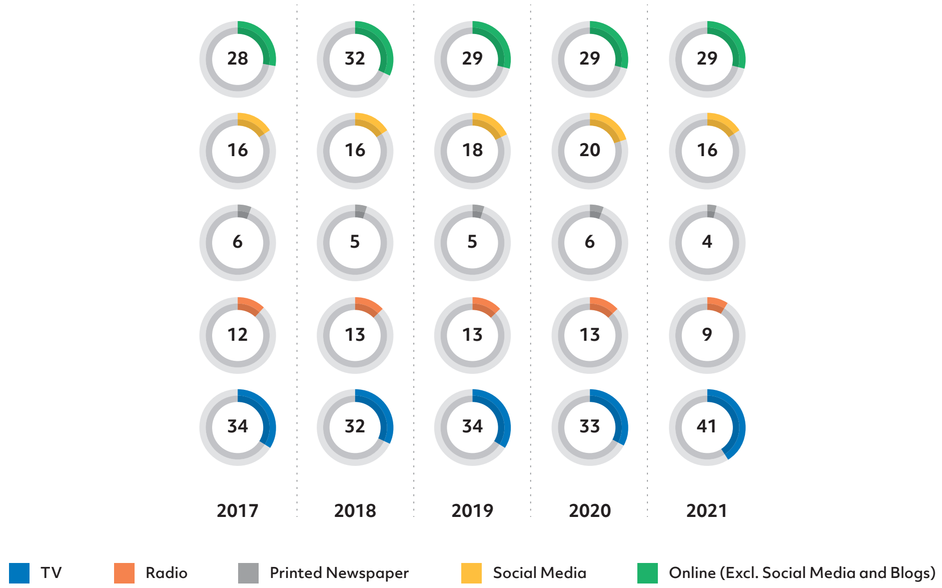
Irish people tend to the centre of politics and this has not changed over the past few years. If you look at the categories of 'centre', 'slightly left of centre' and 'slightly right of centre' they account for 61 per cent. There are more people who consider themselves 'fairly or very left wing' (15%) than 'fairly or very right wing' (8%).

SECTION TWO

SOURCES AND DEVICES

This section details the main sources and devices used by Irish news consumers as well as the types of news they prefer.

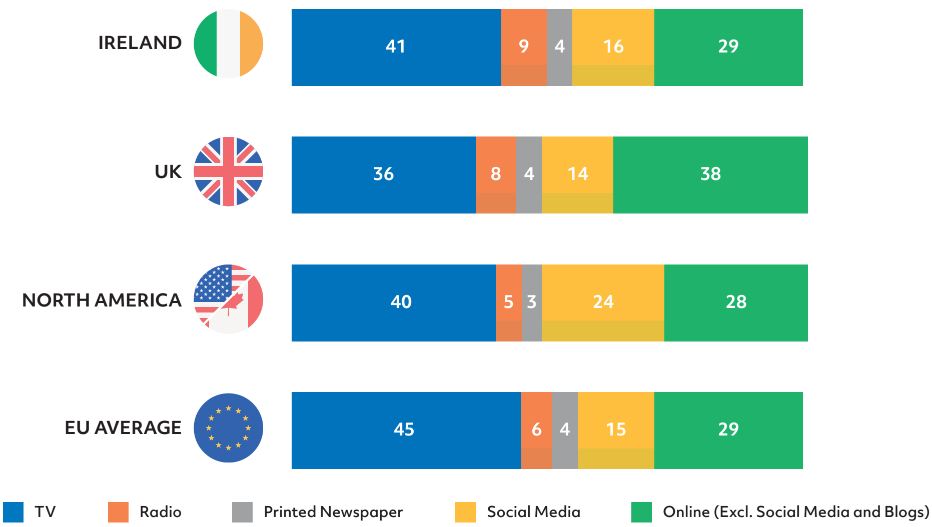
FIG 11: MAIN SOURCES OF NEWS BY YEAR



Q. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?

This year has seen a considerable rise in consumers who cite television as their MAIN source of news in Ireland, up eight from 33 to 41 percentage points. Irish people, who have experienced three major lockdowns since the start of the COVID-19 pandemic are tuning in to television news bulletins to catch the latest news on lockdowns, travel rules, COVID-19 daily case numbers, and the vaccine rollout. The government, HSE and NPHET have mostly timed their briefings in advance or during the main bulletin times which increases the number of television viewers. These figures are in sharp contrast to figures from the past few years when numbers of television news viewers bounced around the low 30s. It will be interesting to track this figure in the future to see if it constitutes a renewed and continuing interest in television news or if it represents a COVID-19 bump. The category of online media as a main source has not changed from last year and social media has dropped four percentage points from last year. Unsurprisingly the last year has not been so good for print newspapers (down two points), as people have been in lockdowns and may have been wary of touching printed documents due to the pandemic. Radio is the main source of news for 16 per cent of those surveyed, down four percentage points.

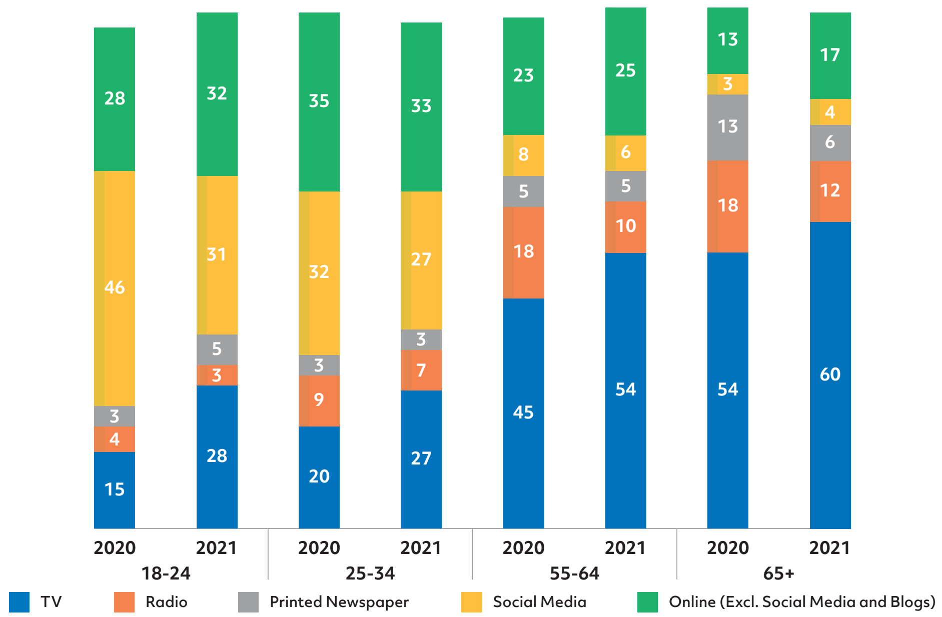
FIG 12: MAIN SOURCE OF NEWS INTERNATIONAL COMPARISON



Q. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?

As previously noted, Ireland has seen a significant increase in the number of people relying on television as their MAIN source of news (+8pp). In comparison, the UK is also up seven points from last year, the EU average is up two points to a very high 45 per cent, and North America is up one point (40%). Radio is slightly down in all markets on this chart: in Ireland it is down four percentage points. This could be attributed to the halt in commuting that happened due to lockdowns. Printed newspapers are down in all places. While this is part of a trend that has been happening over recent years, this will also have been affected by lockdowns. Social media as a category is down for Ireland but remains the same for the UK and the EU, and goes up two points in North America.

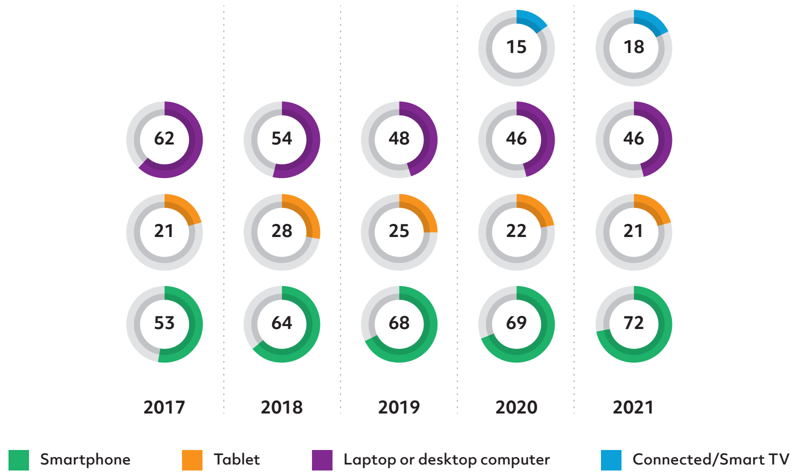
FIG 13: MAIN SOURCES OF NEWS BY SELECTED AGE GROUPS



Q. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?

There is an unusually high jump in the percentage of young people (18-24) citing TV as their main source of news (up 13pp). The second age group (25-34) sees a seven point jump, and the 55-64 age group a nine point jump. Even the 65+ group has an increase of six percentage points. For the 18-24 group this move towards TV news has largely come at the expense of social media, dropping 15 points from 46 per cent to 31 per cent. The switch to television in this age group may be linked to moving back home with family members who will have the television on in the living room for health briefings and television bulletins. The large drop in over +65s citing newspapers as their main source of news (-7pp) may also be affected by 'cocooning' or strict lockdown restrictions and hesitancy towards buying and touching a printed document, handled by other people during a pandemic.

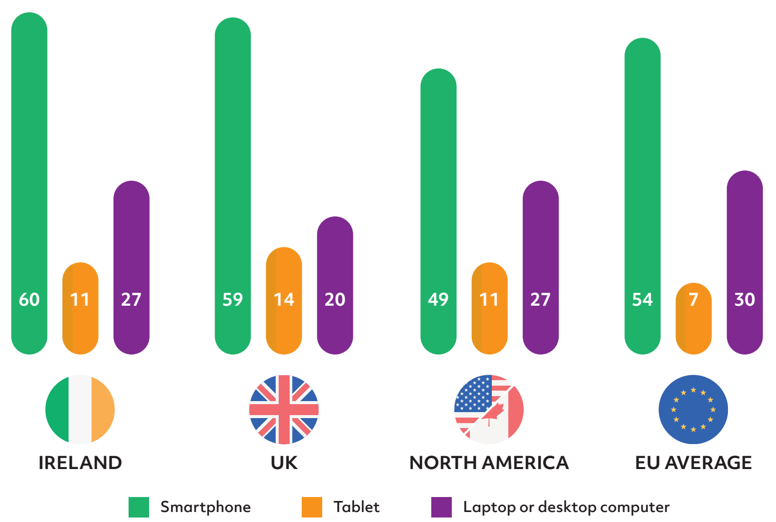
FIG 14: DEVICES USED TO ACCESS NEWS IN LAST WEEK



Q. Which, if any, of the following devices have you used to access news in the last week?

After significant changes in results between 2017-2019 these trends continue. COVID-19 may be the cause of smartphone use going up a further three points to 72 per cent; tablet use is down one point to 21 per cent; and laptop or desktop computers remain the same at 46 per cent. Connected/smart TVs are up three to 18 per cent, potentially due to people having to remain home during lockdowns.

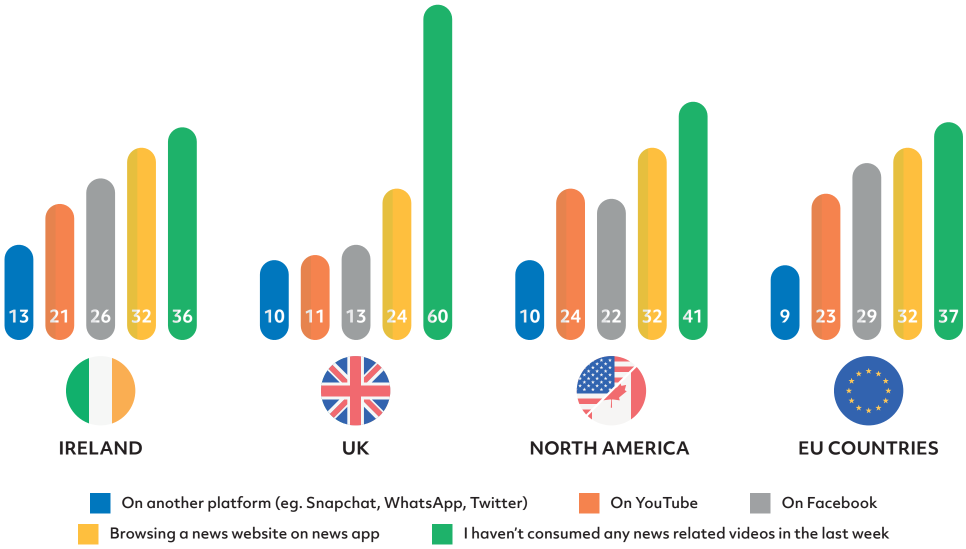
FIG 15: MAIN DEVICE FOR NEWS INTERNATIONAL COMPARISON



Q. You've said you used the following devices to access news in the last week, which is your MAIN way of accessing online news?

In Ireland the main device for accessing online news is the smartphone: jumping from 37 per cent (2017), to 57 per cent (2020) to 60 per cent (2021). Smartphones are also the main way of accessing news online in the UK (59%); the EU (54%) and some way behind, in North America (49%). In Ireland many telecom companies offered special deals for data during lockdowns and lowered prices, which may account for some of the upswing. Laptop and desktop computers are also up three percentage points in Ireland (27%), which may also be due to telecom deals on data. However, figures for laptop and desktop computers were down in the UK (20%) and North America (27%) and stayed the same in the EU (30%).

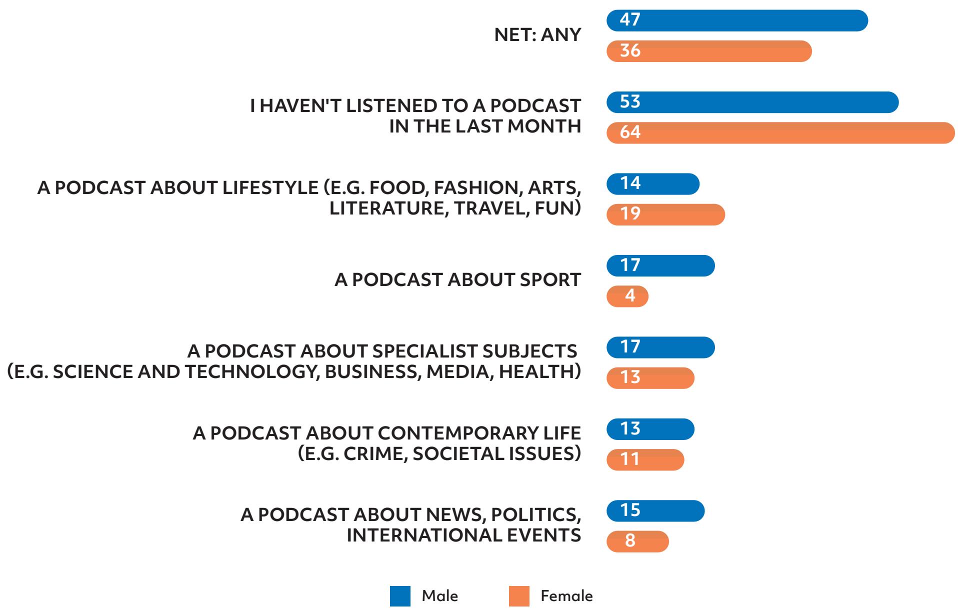
FIG 16: WAYS OF CONSUMING ONLINE NEWS VIDEO INTERNATIONAL COMPARISON



Q. Thinking about consuming online news video (of any kind) over the last week, which of the following did you do? Please select all that apply.

As was the case last year, large numbers of people say they have not watched any news related videos in the past week. The number choosing this particular option is very high in the UK. Browsing a news website or news app appears to be the most popular way to watch online news videos, which is good news for media companies. This is followed by Facebook, except for North America where it is beaten two points by the platform YouTube.

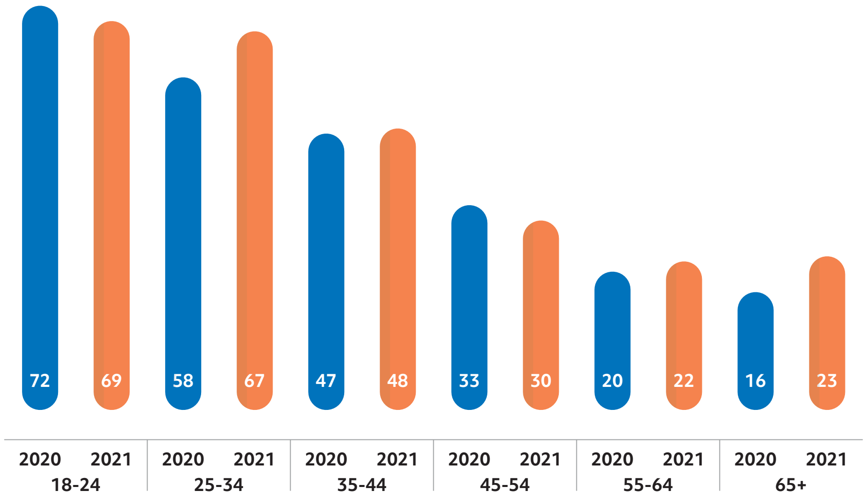
FIG 17: TYPES OF PODCAST LISTENED TO IN THE LAST MONTH BY GENDER



Q. A podcast is an episodic series of digital audio files, which you can download, subscribe or listen to. Which of the following types of podcast have you listened to in the last month? Please select all that apply.

Podcasts remain popular in Ireland, although there is no significant rise in numbers in 2021. More men (47%) have listened to podcasts than women (36%) over this past year. Both men and women listen to most genres with some small differences noted. There is a larger difference evident for sport in which there is a significant gender gap (men 17% and women 4%). Also in the category 'news, politics and international events' more men listen (15%) than women (8%).

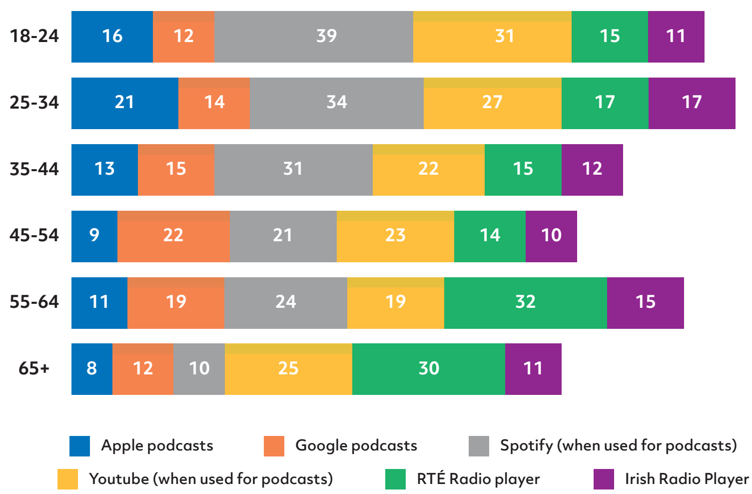
FIG 18: AGE GROUPS LISTENING TO PODCASTS IN THE LAST MONTH 2020 AND 2021



Q. A podcast is an episodic series of digital audio files, which you can download, subscribe or listen to. Which of the following types of podcast have you listened to in the last month? Please select all that apply.

The Irish are very fond of listening to podcasts; numbers jumped three points to 40 per cent in 2020, and are up another point to 41 per cent this year. It is possible that COVID-19 restrictions on movement have caused the rise to tail off slightly, as fewer people have been commuting. The age group with the biggest jump in 2021 is the 65+ age group (+7pp).

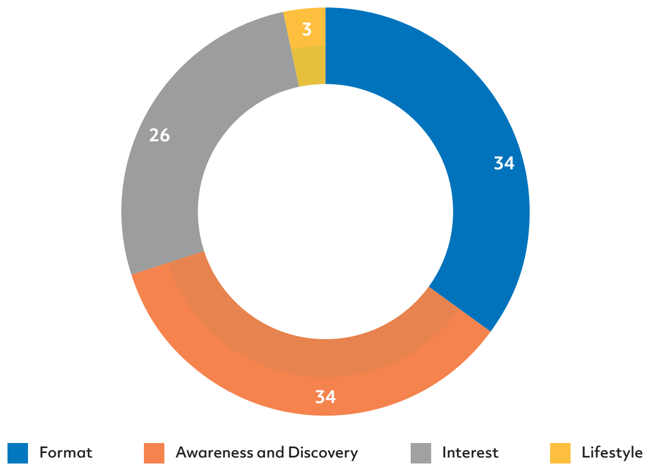
FIG 19: PODCAST APPS BY AGE GROUP



Q. Which of the following apps or websites do you mainly use to find and play podcasts? Please select all that apply.

Younger age groups are more likely to choose Spotify and YouTube over RTÉ Radio Player. The 55-64 group and the 65+ group are more likely to listen over the RTÉ Player. One reason could be that RTÉ and Irish Radio Player broadcasts are better known for catch up segments of radio programmes rather than separately produced podcasts. YouTube is popular in all age categories, surprisingly even with the over 65s. The group with the highest number that listen to podcasts via Apple Podcasts is the 25-34 year olds.

FIG 20: REASONS FOR NOT LISTENING TO PODCASTS



Q. You say you have not listened to any podcasts in the last month. What are the main reasons for this? Please select all that apply.

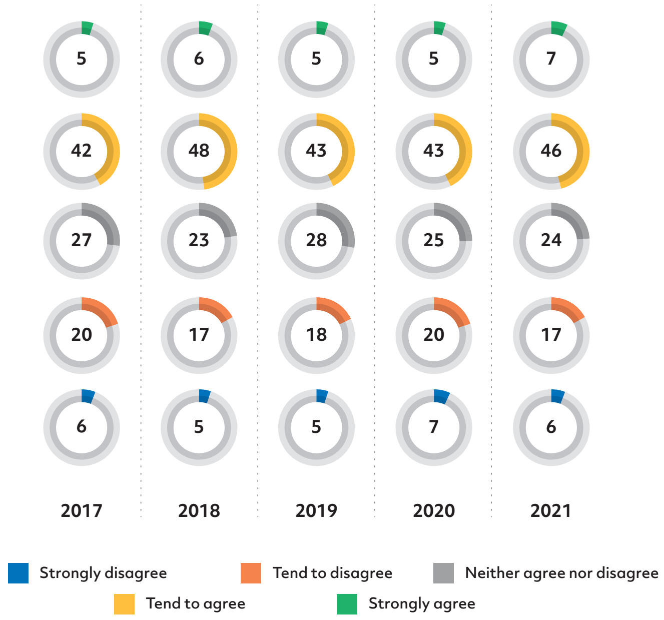
It is important to realise that there is still a majority of people who say they do NOT listen to podcasts (64% of women and 53% of men). The overwhelming reasons given are 'format' and 'awareness and discovery'. This suggests there is some work to be done to make converts of potential listeners who otherwise have technical and knowledge issues in terms of accessing available and popular podcasts.

SECTION THREE

ATTITUDES, TRUST AND PAYMENTS

This section outlines attitudes to news among Irish news consumers. It details their attitudes towards trust, disinformation, and paying for news.

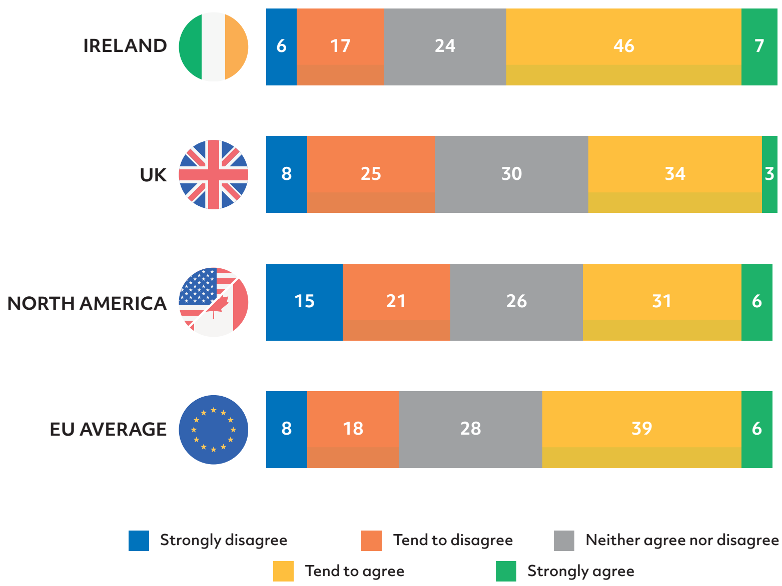
FIG 21: TRUST MOST NEWS MOST OF THE TIME



Q. I think you can trust most news most of the time.

Levels of public trust in the news have increased over the past year. The number of respondents who tend to agree with the statement that "you can trust most of the news most of the time" increased by by three percentage points over the past year (43% to 46%). Another seven per cent strongly agree, meaning that 53 per cent express positive levels of trust in the news media. The levels of mistrust in the news media - at 23 per cent, taking those who tend to disagree and those who strongly disagree with the statement - have remained constant since 2017. Looking at the 46 media markets covered by the international Reuters Digital News Report more generally, trust in news has increased, possibly because of a return to trusted sources during the COVID-19 pandemic. There appears to have been a modest "Covid bump" in Ireland; however, trust levels were relatively high, even before COVID.

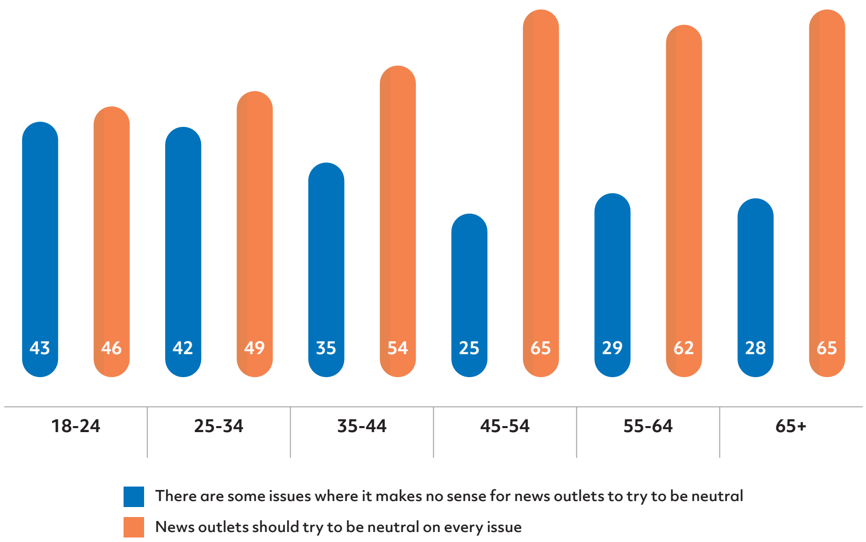
FIG 22: YOU CAN TRUST MOST NEWS MOST OF THE TIME INTERNATIONAL COMPARISON



Q. I think you can trust most news most of the time.

In looking at how Ireland compares internationally, we find that levels of public trust in the media are higher here than elsewhere. If we combine those who agree, or strongly agree, with the statement that "you can trust most of the news most of the time", the figure is 53 per cent for Ireland, compared to 37 per cent for the UK, 37 per cent for North America, and 45 per cent for the EU overall. When it comes to those who actively distrust the media - those who either tend to disagree, or strongly disagree, with the statement - 23 per cent of Irish respondents distrust the news media, compared to 33 per cent in the UK, 36 per cent in North America, and 26 per cent in the EU. This points to a less polarised media environment in Ireland.

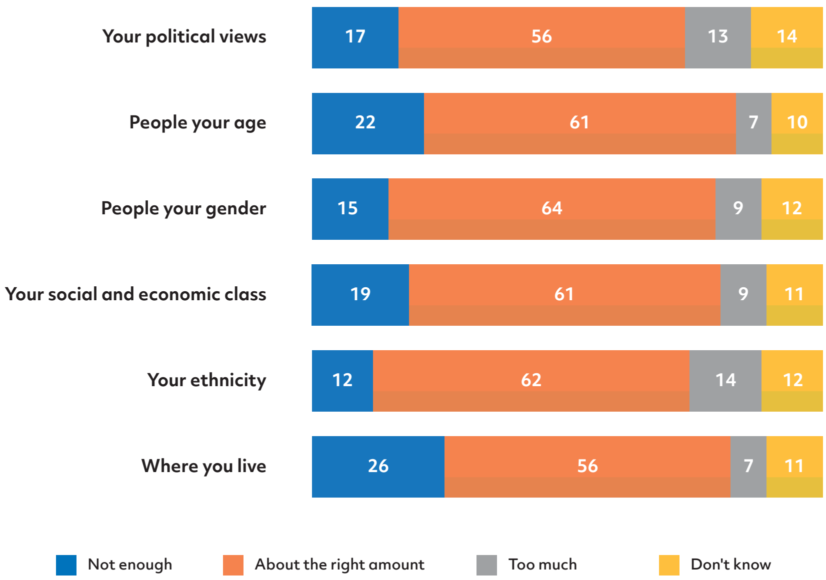
FIG 23: VIEWS ON NEUTRALITY BY AGE



Q. Thinking about the news in general in your country, when news outlets report on social and political issues, which of the following comes closest to your view?

When it comes to the question of whether the news media should take a neutral stance when reporting on social and political issues, we find that older people generally prefer news reports to remain neutral, while younger people are more inclined to believe that, on some issues, strict impartiality is not desirable. These attitudes may be influenced by debates on the ethics of "hearing both sides" on issues such as climate change, where the balance of scientific evidence lies heavily on one side.

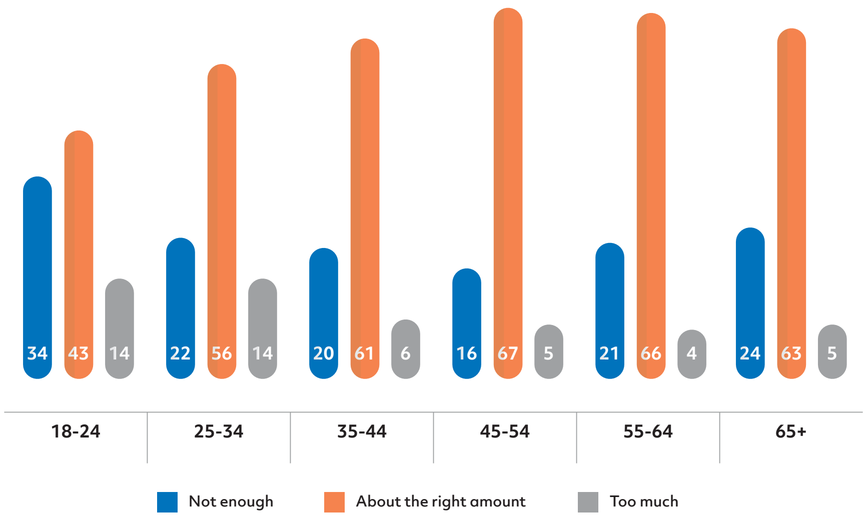
FIG 24: THOUGHTS ABOUT AMOUNT OF NEWS COVERAGE OF:



Q. Thinking about the news in general in your country, do you think that there is too much, about the right amount, or not enough news coverage of each of the following?

When it comes to the diversity and inclusiveness of news coverage, there is a considerable cohort of citizens who believe the media get it "just about right". The consensus that levels of coverage of people's ethnicity, locality, social class, gender, age, and political orientation are appropriate ranges from 56 per cent (politics and locality) to 64 per cent (gender). There is public appetite for more local news coverage (26% or respondents in favour), while those who would like to see more coverage related to their political views (17%) is quite finely balanced against those who don't know (14%).

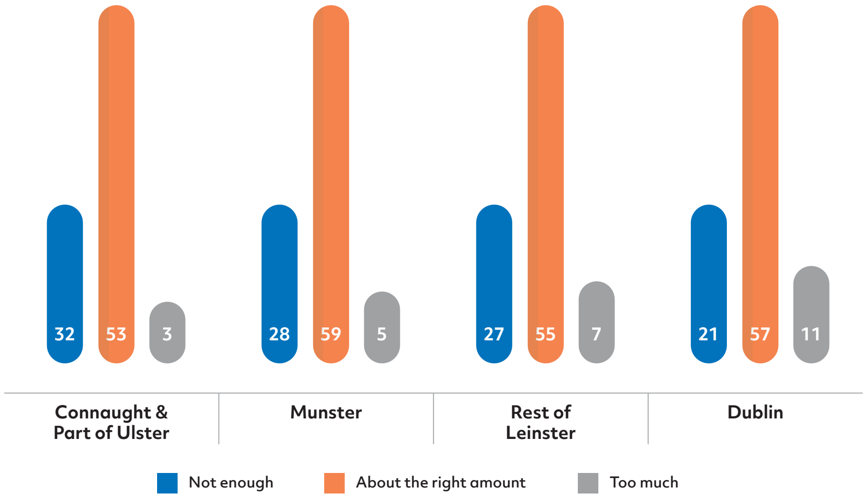
FIG 25: THOUGHTS ABOUT AMOUNT OF NEWS COVERAGE BY AGE GROUP



Q. Thinking about the news in general in your country, do you think that there is too much, about the right amount, or not enough news coverage of each of the following?: - People your age.

When the responses to the previous question about the amount of coverage are broken down by age, we can see some slight fractures appearing in terms of audience satisfaction. While those aged 35 upwards are mostly content with the level of coverage, almost one in four (24%) of the over 65s believe there is not enough coverage of people like them, pointing to concerns around the erasure of older generations from media coverage. Elsewhere, the most stark result is that one in three (34%) of the 18-24-year-olds believe there is not enough coverage, and this is the only cohort in which fewer than half (43%) are actually satisfied with the amount of coverage.

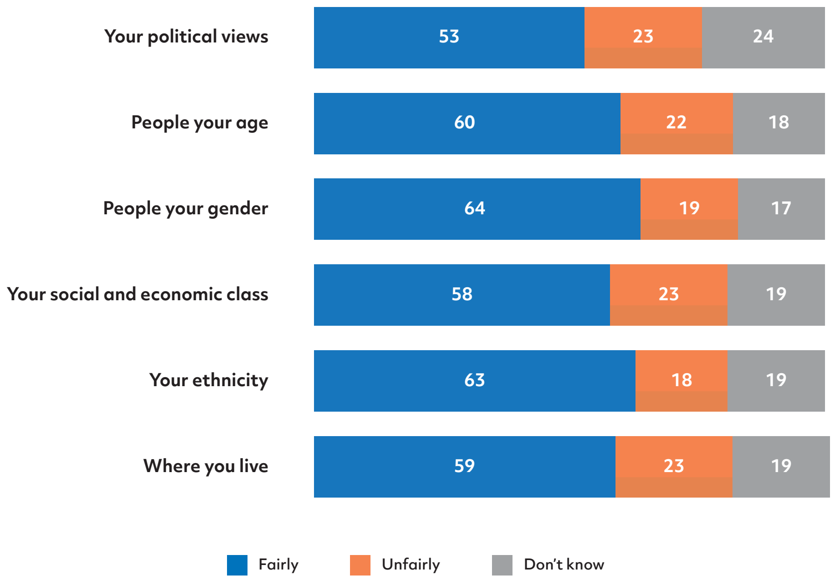
FIG 26: THOUGHTS ABOUT AMOUNT OF NEWS COVERAGE BY REGION



Q. Thinking about the news in general in your country, do you think that there is too much, about the right amount, or not enough news coverage of each of the following?:
- Where you live.

The breakdown of regional responses to the question around perceptions of coverage is illustrated above. Almost one in three (32%) of respondents in Connaught and the part of Ulster included in this survey (counties Donegal, Monaghan and Cavan) feel their home area does not receive enough coverage, compared with just 21 per cent of those in Dublin. However, those in Munster are actually the most content overall, with 59 per cent saying they are well covered from a geographic perspective. The 11 per cent of people living in Dublin who believe the capital receives too much attention is also interesting: it is difficult to say for certain, but this could be tied to perceptions of a Dublin-centric media. Alternatively, perhaps those from around the country who have moved to the capital, feel the city is overrepresented in media compared with the attention granted to their home areas.

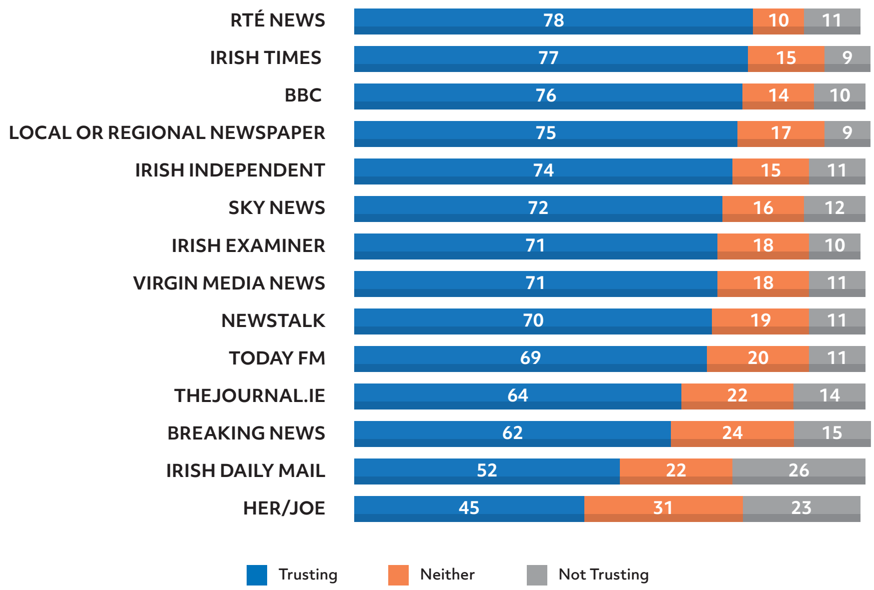
FIG 27: PERCEPTIONS OF FAIRNESS IN NEWS COVERAGE



Q. Thinking about the news in general in your country, do you think that news organisations in your country cover each of the following fairly or unfairly?

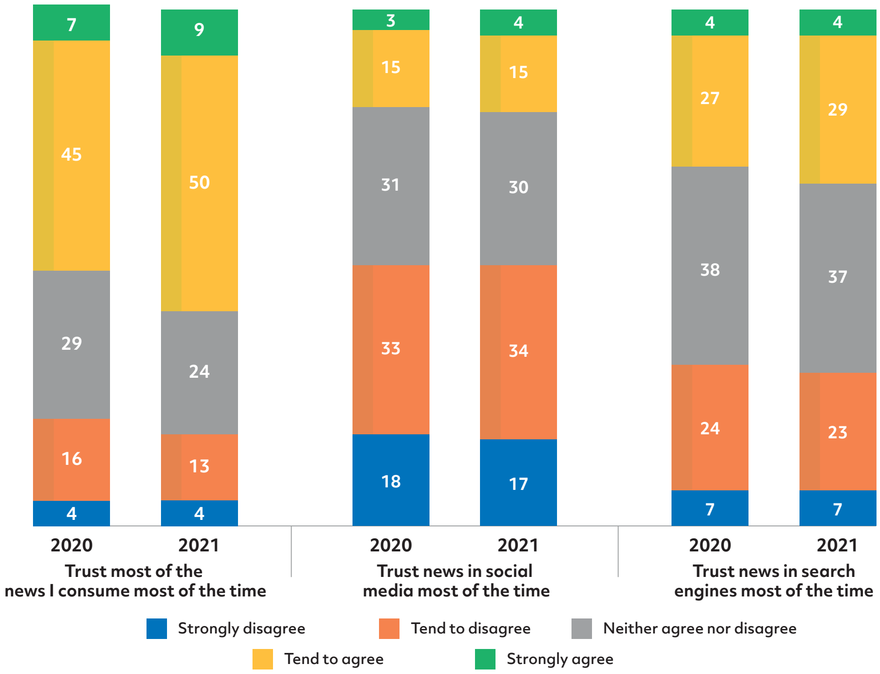
Despite the consensus on levels of coverage of issues relating to diversity and inclusion, there is less agreement about the fairness of such coverage. While 53 per cent of respondents believe that coverage of their political views is fair, 23 per cent disagree, and 24 per cent don't know. Across all topics, there is a considerable group of news consumers - roughly a quarter - who believe that issues relating to their gender, class, ethnicity, locality, and political views, are not being covered fairly by the news media.

FIG 28: TRUST IN NEWS BRANDS



In order to gauge levels of trust in particular news brands, respondents were shown a pre-selected yet extensive list of news organisations. It is likely that respondents expressed more trust in news brands with which they were familiar, and less in those unfamiliar to them. Even so, levels of trust in established news brands is remarkably high, with eight news organisations recording trust levels above 70 per cent. Local and regional news outlets are also highly trusted by the public. RTÉ, perhaps because of the central role it has played during the COVID-19 pandemic, is the most trusted news source, with 78 per cent of respondents saying they trust the public service broadcaster.

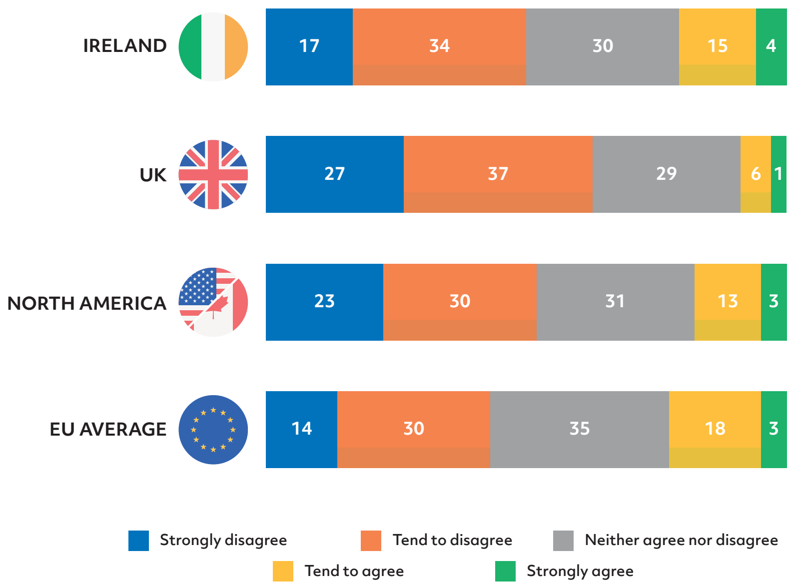
FIG 29: TRUST IN NEWS VIA DIFFERENT SOURCES



Q. I think I can trust most of the news I consume most of the time.
Q. I think I can trust news in social media most of the time.
Q. I think I can trust news in search engines most of the time.

Respondents show more confidence in the news sources they consume themselves than in the news in general. Most people (52% in 2020, increasing to 59% in 2021) either tend to agree or strongly agree with the statement that "I think I can trust most of the news I consume most of the time". News consumers appear confident in their own media literacy and in their ability to search out trustworthy news sources. They are much less trusting of news they see on social media, or in search engines, although levels of trust/mistrust in these sources has not changed much between 2020 and 2021. The increase in levels of trust in one's own selected media sources over the past year is significant (an increase of 7 percentage points), and could indicate a retreat into "news silos" and a lack of openness to a diversity of news sources.

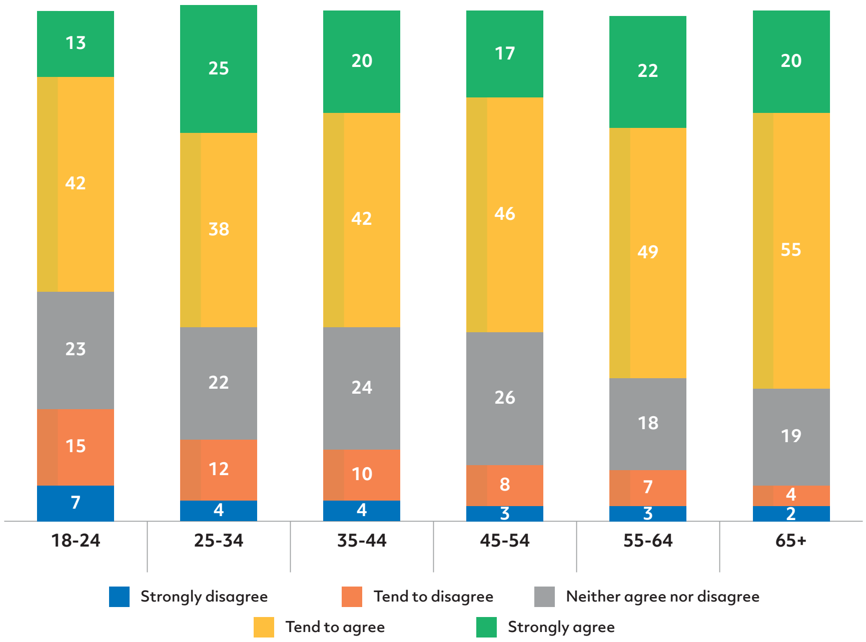
FIG 30: TRUST NEWS IN SOCIAL MEDIA MOST OF THE TIME INTERNATIONAL COMPARISON



Q. I think I can trust news in social media most of the time.

Irish respondents are generally sceptical of news they see on social media, with 51 per cent either disagreeing or strongly disagreeing with the statement "you can trust the news on social media most of the time", and a sizeable cohort neither agreeing nor disagreeing. Irish respondents are slightly more likely to trust news shared on social media than those in the UK, but slightly less likely to do so than the EU average. Relatively low levels of trust in news on social media in North America and in the UK may be related to increased levels of polarisation in those regions. The use of social media to spread COVID-19 disinformation may also have affected trust levels in news on social media in all territories.

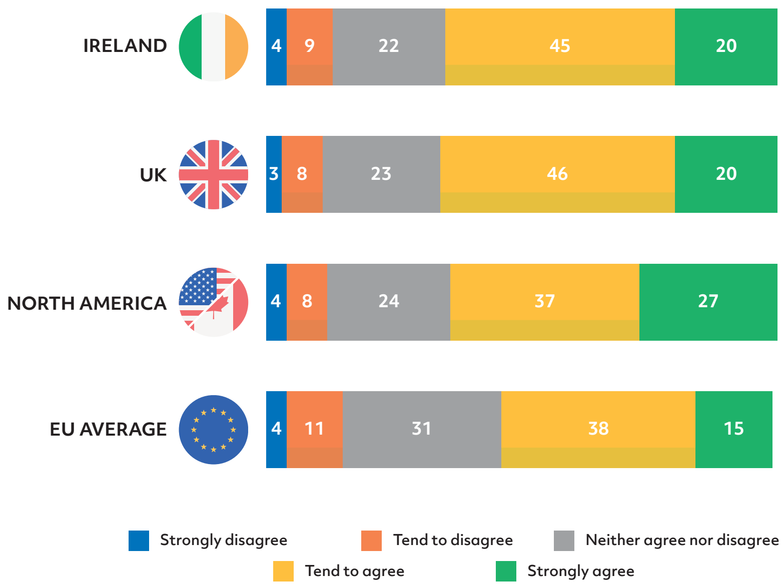
FIG 31: CONCERN ABOUT REAL AND FAKE BY AGE GROUP



Q. Please indicate your level of agreement with the following statement." Thinking about online news, I am concerned about what is real and what is fake on the internet."

A little over half of 18-24-year-olds (55%) either strongly agree or tend to agree with the statement that "I am concerned with what is real and what is fake on the internet", compared to 75 per cent of those in the 65+ age group. Concern over "fake news" or internet "deep fakes" or other forms of digital deception increases with age. This may be because younger people generally have higher levels of confidence in their digital literacy skills, and in their ability to identify disinformation online, while older people generally are less confident in their digital skills.

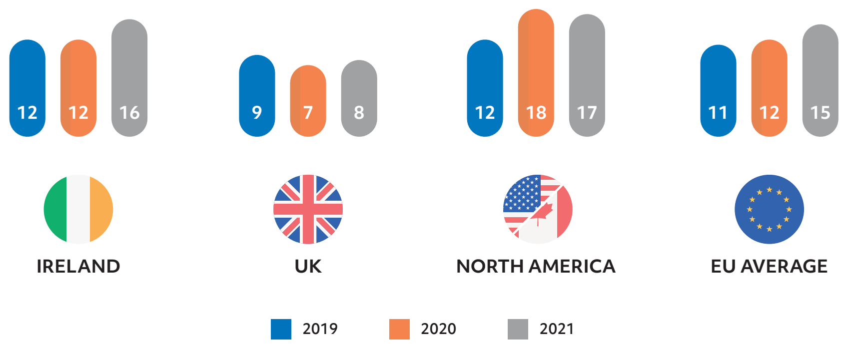
FIG 32: CONCERN ABOUT WHAT IS REAL AND WHAT IS FAKE INTERNATIONAL COMPARISON



Q. Please indicate your level of agreement with the following statement." Thinking about online news, I am concerned about what is real and what is fake on the internet."

The public in Ireland exhibits similar levels of concern over what is fake and what is real online as those in the UK and North America. In Ireland, 65 per cent of respondents either tend to agree or strongly agree with the statement "I am concerned about what is real and what is fake on the internet", compared with 66 per cent in the UK, and 64 per cent in North America. Across the EU 27, there are lower levels of mistrust in online content (53%).

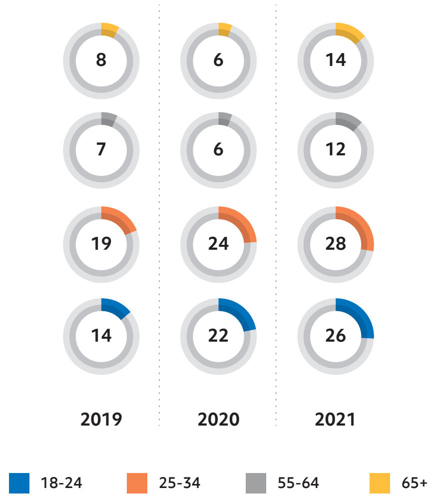
FIG 33: PAYING FOR NEWS INTERNATIONAL COMPARISON



Q. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription, a donation, or one off payment for an article or app or e-edition).

There had been an expectation in the media sector that, as the public became more accustomed to subscribing for online services such as Spotify, Netflix, Amazon Prime or Disney +, they would also be more willing to subscribe to news media services. This expectation is only partially borne out by our survey, with numbers of Irish news consumers paying for news subscriptions or access increasing slightly, from 12 per cent in 2019 to 16 per cent in 2021. Irish people are more willing than their EU or UK counterparts to pay for news. In North America, we see a slight decline, from 18 per cent to 17 per cent, in the number of respondents paying for news. This may be evidence of the end of the "Trump bump", which saw news subscriptions rise in the US during the Trump presidency. Elsewhere, public willingness to pay to access professionally produced journalism has shown relatively modest increases.

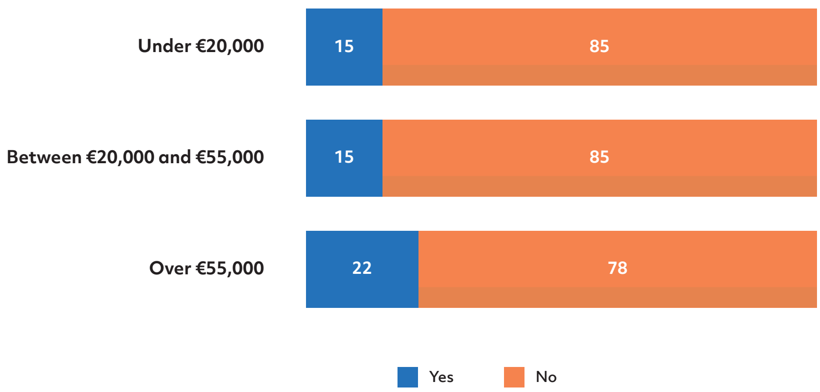
FIG 34: PAYING FOR ONLINE NEWS BY SELECTED AGE GROUP AND YEAR



Q. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription, a donation, or one off payment for an article or app or e-edition).

Looking at news consumers who have paid for access to news content in the past year, we find that there has been an increase across all age groups in those who have subscribed, donated, or paid a news organisation to view content. The increase among the older cohorts (55-64, and 65+) has been the most marked, although the increases among younger groups (18-24, and 24-34) have also been significant. Younger people are twice as likely to have paid for news in the last year as older people, but the older section of the population willing to pay for news is increasing. The increase among this older group may be linked to the decisions of the Mediahuis group (publishers of the Independent titles) and the *Irish Examiner* (owned by the *Irish Times*) to introduce subscription models.

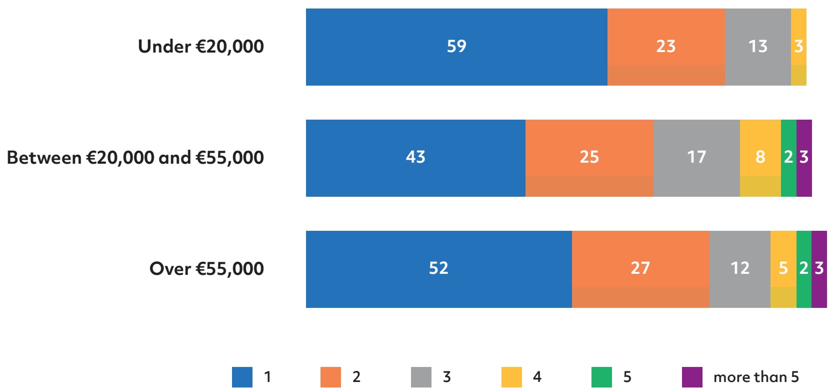
FIG 35: PAID FOR ONLINE NEWS IN THE LAST YEAR BY INCOME



Q. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year?

There is concern among media analysts that the introduction of paywalls and subscriptions may make professional journalism accessible only to the wealthier sections of society. There is some evidence from our survey that this concern is well founded, as those earning over €55,000 a year are considerably more likely to have paid to access online news in the last year than those on lower incomes (€20,000 to €55,000, and below €20,000). However, of more concern to the news industry is the fact that a large majority of respondents (between 78% and 85%) have not paid for access to news in the last year.

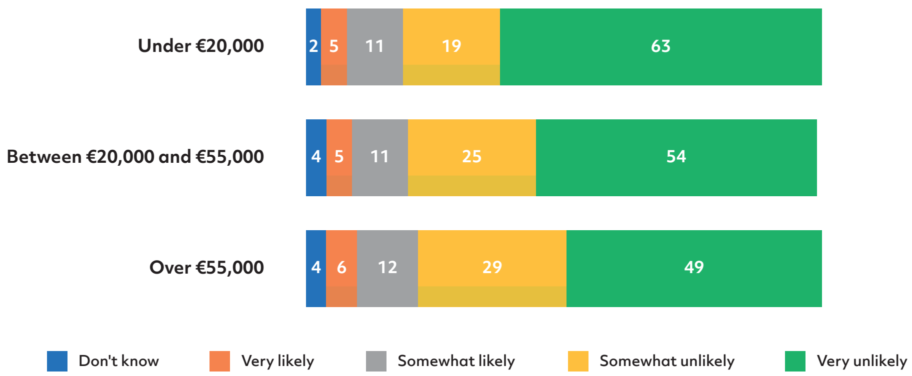
FIG 36: NUMBER OF PAID SOURCES BY INCOME



Q. You said you have paid a subscription or made an on-going donation to a digital news service in the last year. How many different news providers do you regularly pay money to?

Of those who have paid to access news content in the past year, those on lower incomes are more likely to access a single news source. Those on middle and higher incomes tend to pay for access to multiple news sources, with a small cohort (3% of both middle and high income earners) paying to access more than five news sources. Diversity of news sources is a factor in puncturing filter bubbles and countering news echo chambers. As traditional news brands such as the *Irish Times*, Independent group, and the *Irish Examiner* introduce various forms of payment for access, those earning less may suffer from a lack of diversity in their news sources.

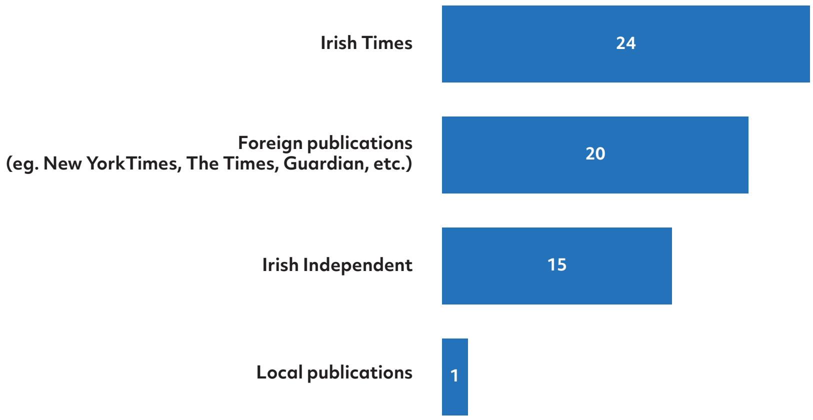
FIG 37: LIKELIHOOD TO START PAYING FOR NEWS



Q. You said you have not paid for online news content in the last year... How likely or unlikely would you be to pay in the next 12 months for online news from particular sources that you like?

There is a large cohort of respondents across all income bands who are either somewhat or very unlikely to pay for access to news, ranging from 78 per cent in the higher income bracket, to 79 per cent in the middle income bracket, and 82 per cent in the lower income bracket. Levels of willingness to pay to access news (those who say they are somewhat or very likely to do so in the next year) are similar across income brackets, ranging from 16 per cent (lower and middle) to 18 per cent (higher). However, there is a considerable number of respondents who may be "persuadable" - i.e. they are "somewhat unlikely" to pay for news. This group is larger (29%) in the higher income group than in the middle (25%), or lower (19%) income groups.

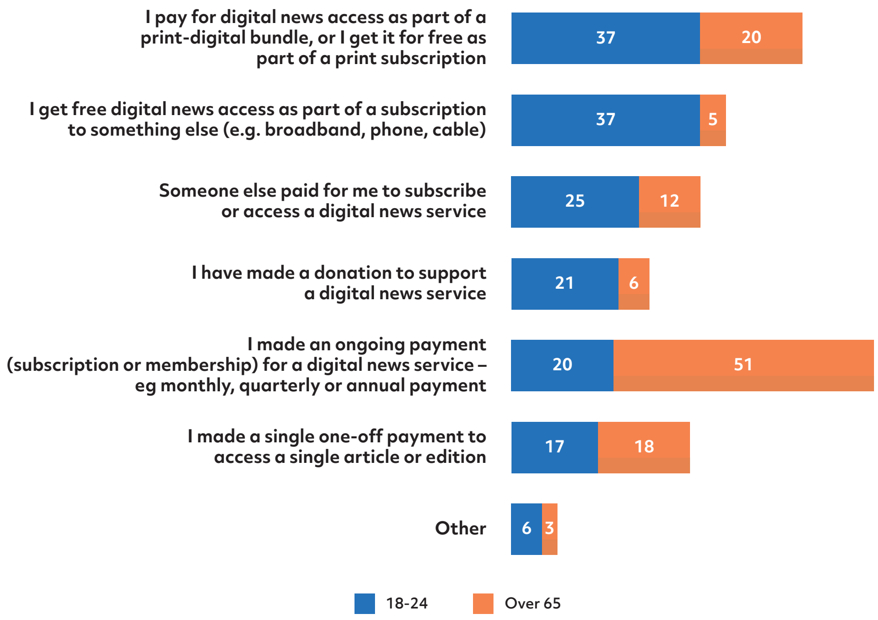
FIG 38: TOP NEWS SUBSCRIPTIONS



Q. Please enter the name of the news subscription you value most, followed by your supplementary subscriptions.

Respondents who said they paid for a news subscription were then asked to name the outlets they subscribed to. It's interesting to note that the figure for local news subscriptions is very low compared to other countries. For instance, 57 per cent of those who pay for news in Denmark subscribe to a local publication. Very few local news organisations in Ireland have tried a subscription model, and it appears there may be an audience willing to pay were they to do so. The competition for subscriptions is intense, with Irish publications such as the *Irish Times* and the Independent titles competing with large international titles such as the *New York Times,* The *Times and* the *Guardian.* In the Irish context, the *Irish Times*, which has been active in the online and subscriptions space longest, has secured a sizeable (24%) share of the subscriptions market. The *Irish Independent*, which erected a hard pay wall when Mediahuis bought the group, has 15 per cent. It is also interesting to note that Mediahuis has played around with their subscription model, first introducing a "freemium" model (some content free to view, but most behind a paywall), then a metred paywall (a certain number of articles free per month before being asked to subscribe), and then reverting to their initial, harder paywall.

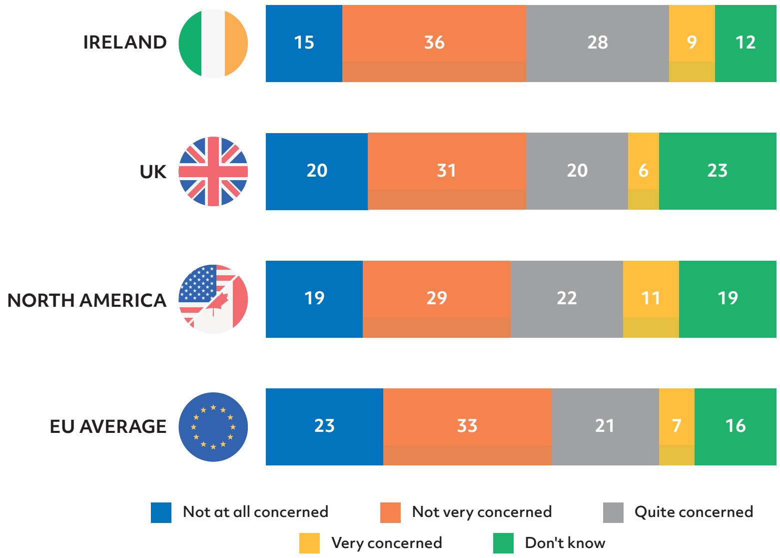
FIG 39: AGE DIFFERENCE BETWEEN METHODS OF PAYING FOR ONLINE NEWS



Q. You said you have accessed paid for ONLINE news content in the last year… Which, if any, of the following ways have you used to pay for ONLINE news content in the last year?

Despite the fact that younger people generally are more accustomed to paying monthly subscription charges for music, video or podcast streaming services, they are more likely to pay for a print-digital bundle, or to get digital access to news free with a print subscription (37%) than to take out a digital subscription (20%). In fact, people over 65 are much more likely to take out a regular news subscription (51%) than their younger counterparts. However, younger people are much more likely than older people (21% to 6%) to have made a one-off donation to help support a digital news service. This finding will be welcomed by news organisations such as the Journal.ie, which has launched a crowd-funded investigative platform, Noteworthy.

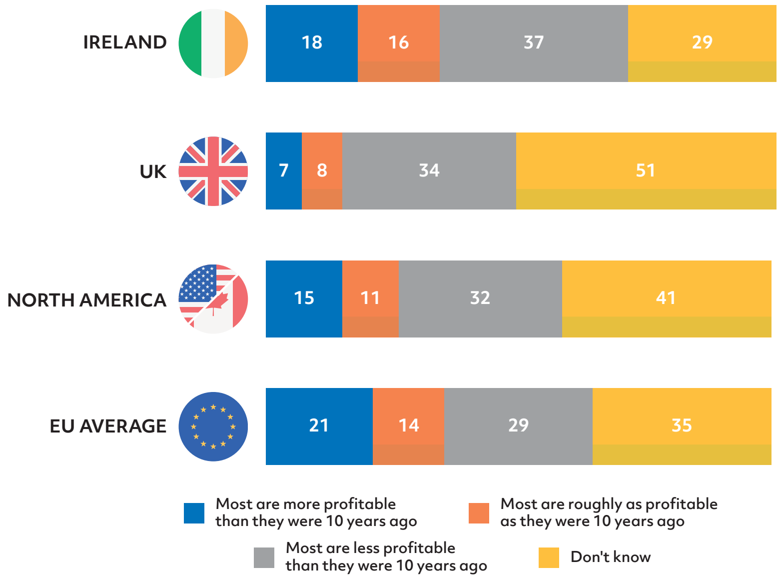
FIG 40: LEVEL OF CONCERN ABOUT FINANCIAL STATE OF COMMERICAL NEWS ORGANISATIONS INTERNATIONAL COMPARISON



Q. How concerned are you, if at all, about the financial state of commercial news organisations in your country?

There is more awareness in Ireland than elsewhere of the threat to the financial viability of commercial news organisations from falling print circulations, loss of advertising revenue to tech platforms, and digital disruption. Some 37 per cent of Irish respondents say they are quite or very concerned about it, compared to 26 per cent in the UK, 33 per cent in North America, and 28 per cent in the EU. Although the precarious state of the news sector is gaining some traction in Ireland, the issue remains a low priority to large groups of people across all territories surveyed. Significant numbers of respondents in Ireland (51%), the UK (51%), the US and Canada (48%), and the EU (56%) are either not at all concerned or not very concerned about this issue. The figure for people who don't know enough about the topic to express an opinion is much lower in Ireland than in other countries, suggesting that the issue is more visible here than elsewhere.

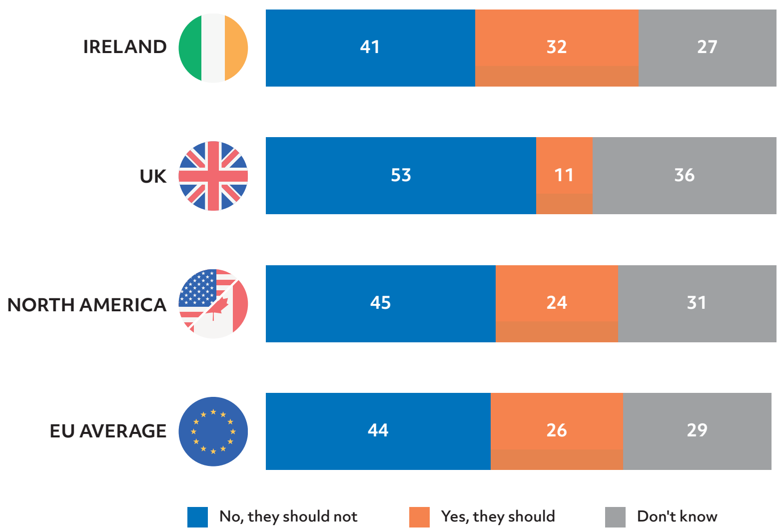
FIG 41: BELIEFS ABOUT FINANCIAL STATE OF COMMERCIAL NEWS ORGANISATIONS INTERNATIONAL COMPARISON



Q. To the best of your knowledge, which of the following best describes the financial state of commercial news organisations in your country?

There is an appreciation of the financial difficulties experienced by many news organisations among the Irish public, with 37 per cent believing that most commercial news organisations are less profitable than they were 10 years ago, the highest figure among the countries surveyed. However, the picture is complex, as 34 per cent of Irish respondents believe news organisations are either more profitable or roughly as profitable as they were a decade ago. It appears that the Irish media still have work to do in communicating the difficulties they face in funding their activities to the public. Internationally, the numbers of respondents who don't know enough about the issue to express their opinion - 51 per cent in the UK, 41 per cent in North America, and 35 per cent across the EU - is significant, suggesting that the media are not doing a good job in telling their own stories. However, again the picture is a complex one, as there is also a sizeable cohort - roughly a third of respondents - across all territories who are aware of the financial difficulties faced by the media.

FIG 42: BELIEFS ABOUT GOVERNMENT INTERVENTION INTERNATIONAL COMPARISON



Q. Should the government step in to help commercial news organisations that can't make enough money on their own?

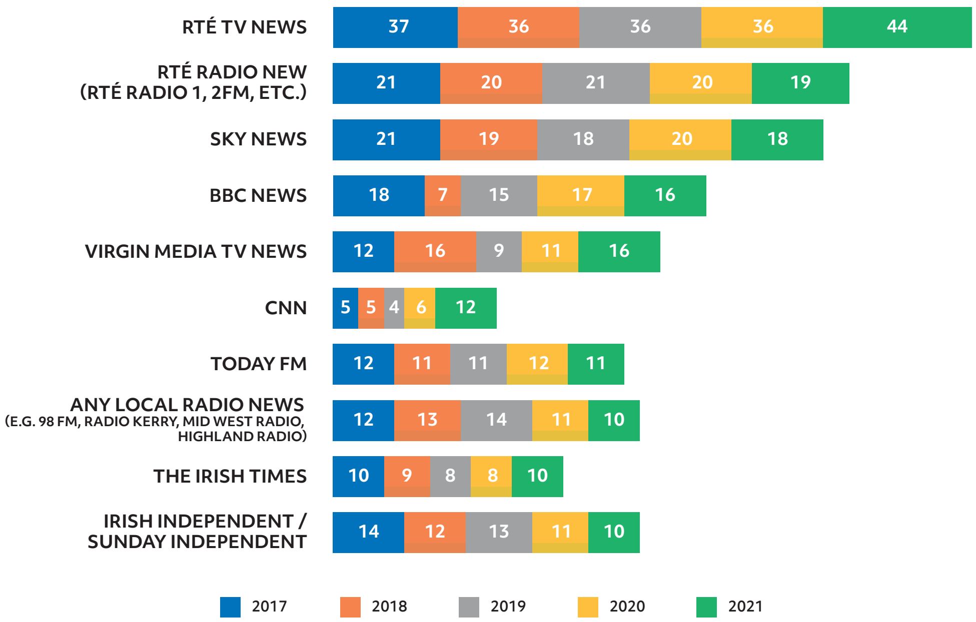
There is considerable support in Ireland for the suggestion that the government should provide assistance to struggling news organisations, with 32 per cent in favour. This is considerably higher than in the UK (11%), North America (24%), and the EU (26%). Likewise, the numbers opposing government support are lower in Ireland than elsewhere, though they still outnumber those in favour (41% to 32%). Opposition to government intervention in the media sector is particularly prevalent in the UK, with 53 per cent of respondents opposing intervention, compared to 45 per cent in North America, and 44 per cent in the EU. These findings add context to the deliberations of the Commission on the Future of Media in Ireland, which was established to examine the economic sustainability of the media section, and to look at possible funding models for public service and commercial media. Commercial media organisations themselves oppose direct financial support, arguing instead for indirect support, such as VAT reduction and reform of the libel legislation.

SECTION FOUR

BRANDS AND DISCOVERY

This section outlines the main sources and brands used by Irish news consumers. It provides a breakdown of consumption patterns across traditional and digital brands, selected types of news, how Irish consumers find news online, and on social media.

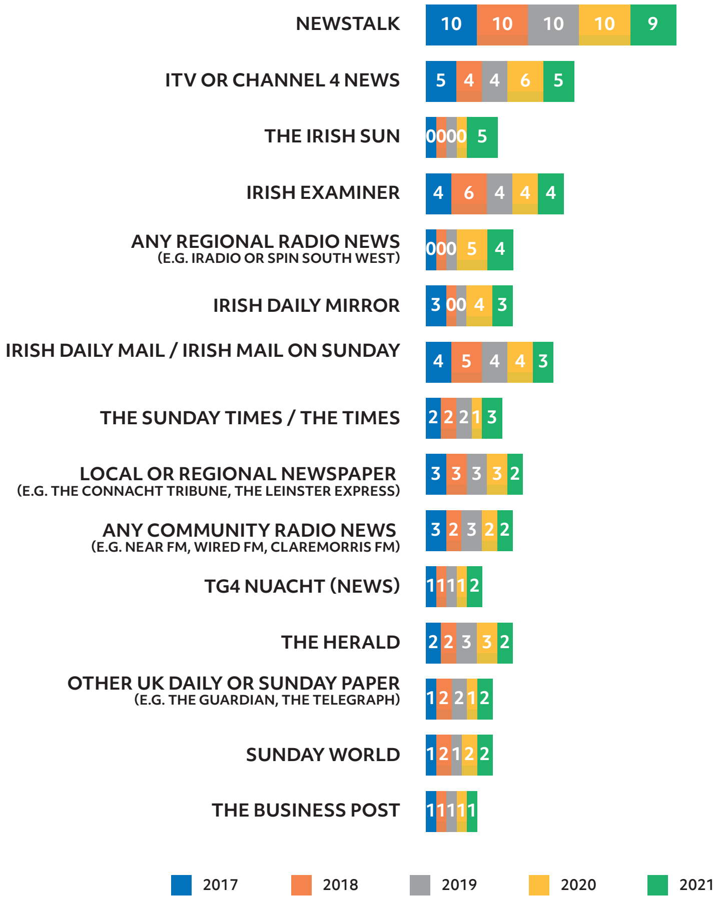
FIG 43: TOP 10 MOST FREQUENTLY USED TRADITIONAL BRANDS



Q. You said you have used the following brands to access news offline in the last week… Which of these, if any, did you use on 3 days or more? Please select all that apply.

Public service broadcaster RTÉ saw a jump in popularity over the past 12 months in its TV news output: it had been steady at 36 - 37 per cent since 2017, but reached 44 per cent in 2021. The station has benefited from the overall increase in television news consumption, as discussed earlier in the report, and we can see its main Irish TV competitor Virgin Media was also up to 16 per cent (+5%). Popular UK news organisations Sky News and BBC News saw slight dips in popularity, possibly as Irish audiences sought more localised and relevant information on COVID-19. Nevertheless, the doubling in popularity of US news channel CNN (from 6% to 12%) is also worth highlighting, potentially driven by the US election and its aftermath in late 2020. As demonstrated elsewhere in the report, radio overall saw a slight decline in use, and that is reflected in the 1 per cent drops in popularity of RTÉ Radio News, local radio, and Today FM. Two traditional print brands, The *Irish Times* and The *Irish/Sunday Independent*, also make it into the top 10 most frequently used.

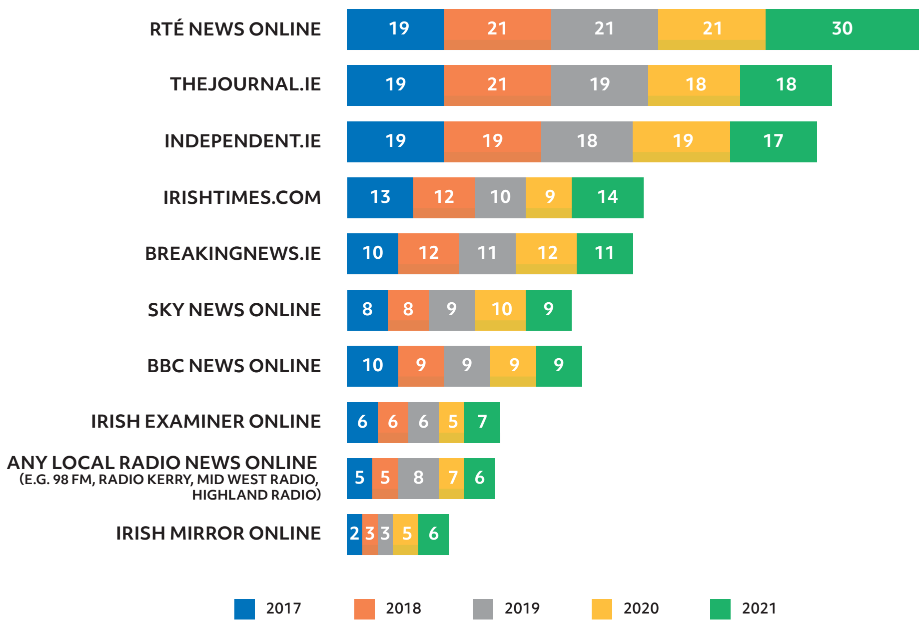
FIG 44: MOST FREQUENTLY USED TRADITIONAL BRANDS (11-25)



Q. You said you have used the following brands to access news offline in the last week… Which of these, if any, did you use on 3 days or more? Please select all that apply.

When we look at the remaining traditional brands, we can see the patterns are repeated, with radio (Newstalk, regional radio) dropping slightly (-1%), and print titles either remaining steady (*Sunday World,* the *Business Post*) or dipping slightly 1% (*Irish Examiner, Irish Daily Mirror, Irish Daily Mail/Mail on Sunday*, local newspapers), apart from some positive movement for the *Sunday Times*/the *Times* (from 1% to 3%) and the *Sun*, appearing on 5%.

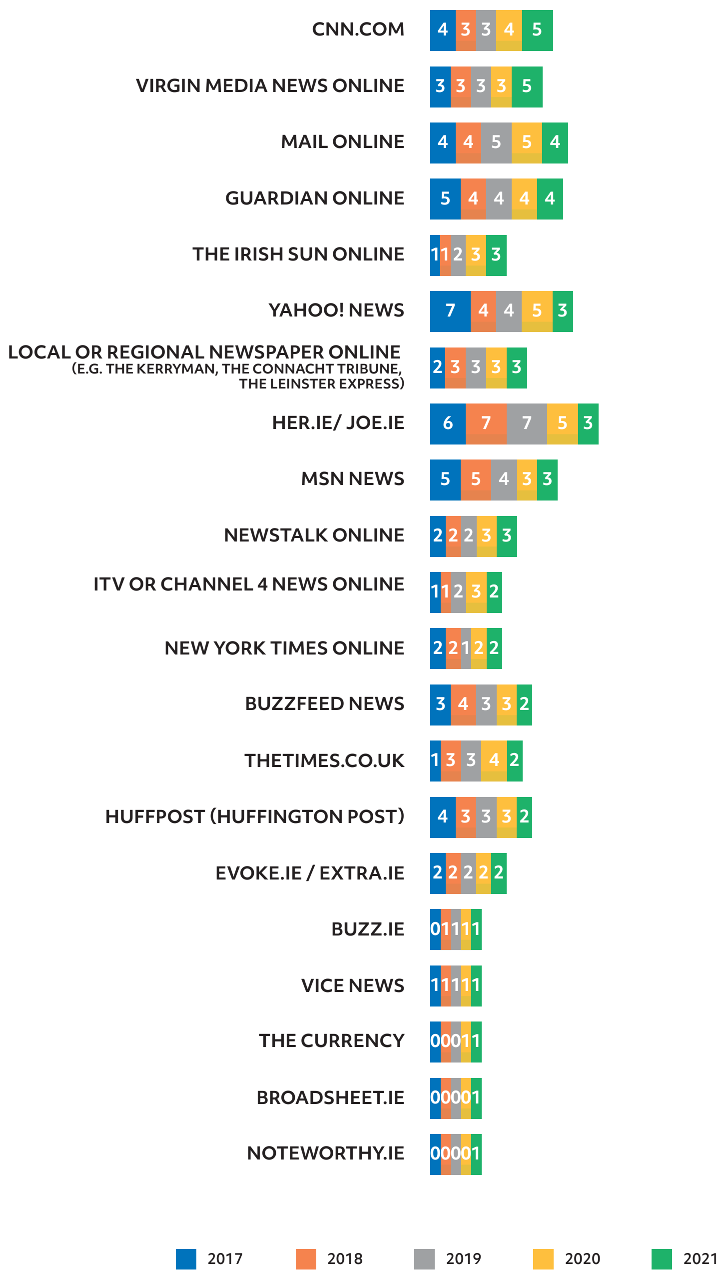
FIG 45: TOP 10 MOST FREQUENTLY USED DIGITAL BRANDS



Q. You said you have used the following brands to access news online in the last week... Which of these, if any, did you use on 3 days or more? Please select all that apply.

Regarding the popularity of digital brands, we can see that RTÉ is again the popular outlet, with around one in three respondents (30%) saying they frequently use RTÉ News online (+9%), mirroring the increase RTÉ saw in its traditional formats possibly due to audiences tuning in for COVID-related coverage and updates that feel reliable and relevant to Ireland. The second most popular brand in the digital space is TheJournal.ie which leads the way among the online-only publications, and which has remained relatively steady over the past five years. For the newspaper brands' digital presence, Independent.ie (home to the Irish Independent and Sunday Independent) at 17% is more popular than IrishTimes.com (14%), although fortunes have flipped for both outlets since last year. Independent.ie, which has been developing its premium/paywalled content, has dipped slightly (-2%), while The IrishTimes (which also has some content behind a paywall) has increased its digital popularity on last year (+5%). Also worth noting is the continued growth of Irish Mirror online in the digital space, which has been consistently growing sine 2017, and now sits at 6%.

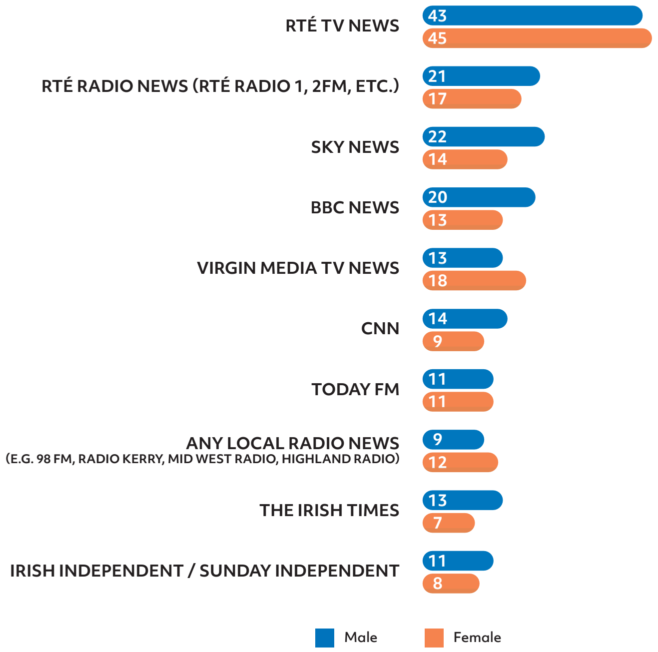
FIG 46: MOST FREQUENTLY USED DIGITAL BRANDS (11-31)



Q. You said you have used the following brands to access news online in the last week... Which of these, if any, did you use on 3 days or more? Please select all that apply.

This chart looks at the remaining outlets online, beyond the "Top 10" in the previous slide. Among Irish outlets, despite Virgin Media being a popular news source in its traditional television format, it is less popular online at 5 per cent, while Her.ie and Joe.ie have declined from their 7 per cent peak in 2018, down to 3 per cent in 2021. A similar decline is evident with Yahoo! news, which has dropped from 7 per cent in 2017 to 3 per cent in 2021. Meanwhile, CNN is the leading US news source online (5%), coming in ahead of the New York Times (2%), while UK brands the Guardian and Mail Online are level at 4 per cent; Sky News and the BBC, both on 9 per cent in the previous slide, are the more popular sources for British news.

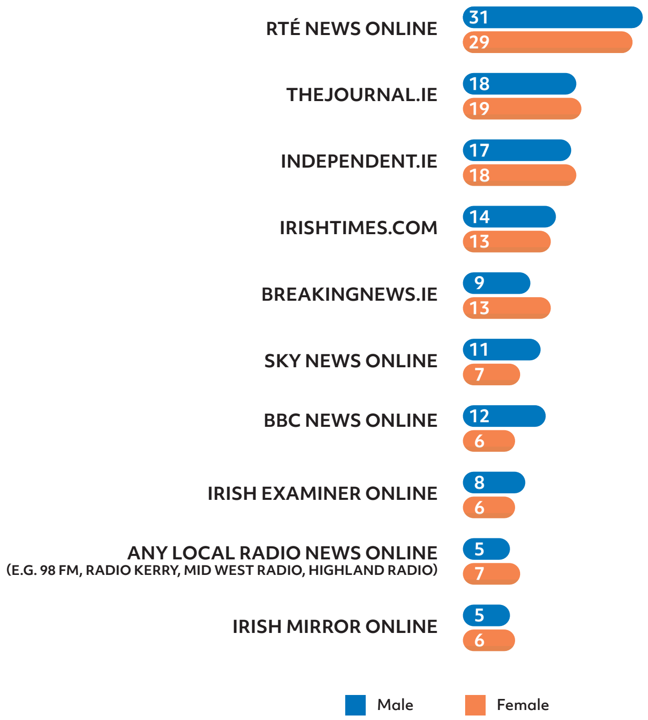
FIG 47: TOP 10 MOST FREQUENTLY USED TRADITIONAL BRANDS BY GENDER



Q. You said you have used the following brands to access news offline in the last week… Which of these, if any, did you use on 3 days or more? Please select all that apply.

When the traditional brands are broken down by gender of audiences, we can see that RTÉ TV news is almost equally popular among males and females, as is Today FM, while the other brands are slightly more fragmented. Virgin Media TV news is much more popular among female viewers, as is local radio news. The remaining seven outlets in the top 10 are more popular among males, with the most notable gender gaps evident for the *Irish Times* (6%), Sky News (8%) and BBC (7%).

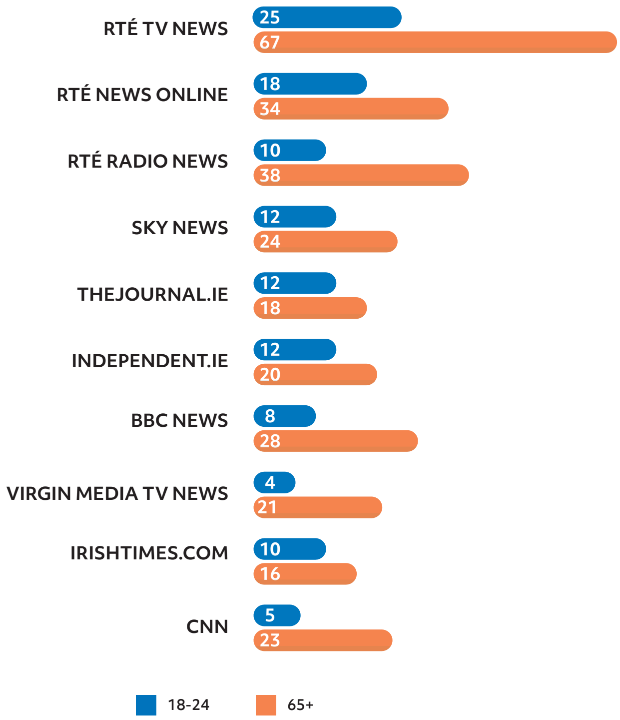
FIG 48: TOP 10 MOST FREQUENTLY USED DIGITAL BRANDS BY GENDER



Q. You said you have used the following brands to access news online in the last week... Which of these, if any, did you use on 3 days or more? Please select all that apply.

When the digital brands are broken down by gender, we again see RTÉ Online just slightly more popular among males, but it is relatively even. The top four digital brands are all quite close, with men also favouring irishtimes.com, and women favouring TheJournal.ie and Independent.ie, but there is not much of a gap between both. More of a gender disparity is evident among consumers favouring BBC News online (6% gap), Breaking News.ie (4%) and Sky News (4%). Overall, it appears that digital news brands are generally less gender divided than traditional brands, as illustrated in the previous chart. This may be due to the more fluid nature of content online and how news material flows through social networks in less formal structures, compared with the more deliberate, brand-driven patterns of seeking news content offline via traditional formats.

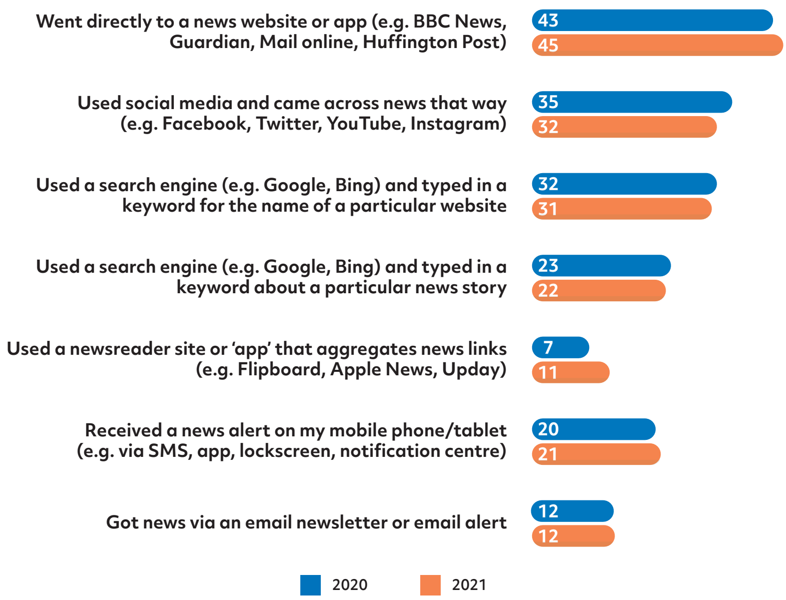
FIG 49: TOP 10 MOST FREQUENTLY USED BRANDS AGE COMPARISON



Q. You said you have used the following brands to access news offline in the last week... Which of these, if any, did you use on 3 days or more? Please select all that apply.

Disparity in age-based consumption patterns is shown above, in which the two categories at either end of the spectrum are illustrated: the young adults aged 18-24 and the over 65s. The overall pattern is clear: the most frequently used brands in Ireland are much more popular among older audiences than younger. While two in every three people aged over 65 are consuming RTÉ news on television, that drops to just one in four young adults. While that might seem like a stark gap, that figure for young adults is actually up 8 percentage points on 2020. The two outlets where the age gap is narrowest are TheJournal.ie and irishtimes.com, where there is a 6% gap in usage between both categories. It is also notable that, on the whole, younger audiences - although a much smaller cohort here - have more even distribution through the brands: there is less of a drop-off through the 10 brands than is evident among the older group. Meanwhile, older audience have much more loyalty to RTÉ television, and then are fragmented around other brands.

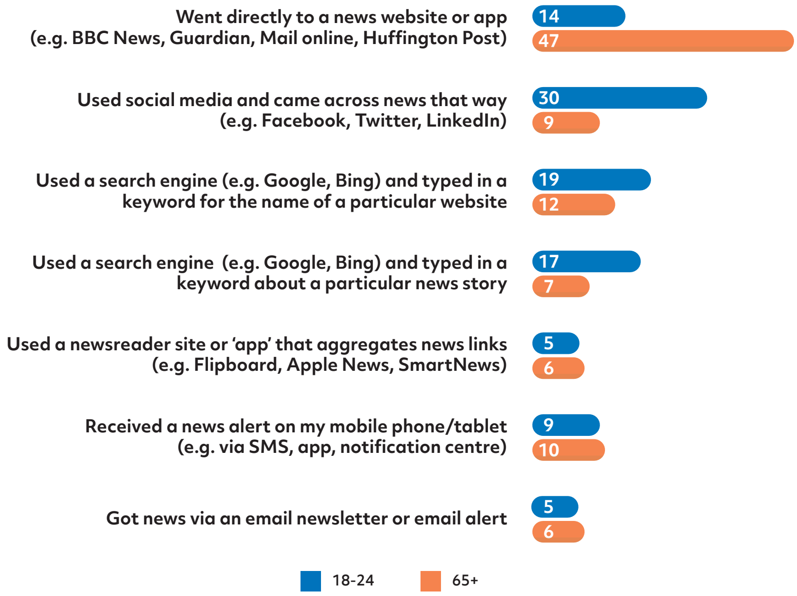
FIG 50: WAYS PEOPLE FOUND NEWS ONLINE 2020 AND 2021



Q. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? Please select all that apply.

Direct traffic to news websites is still the most popular access route for Irish audiences seeking news content online. This route has increased on last year (+2%), while social media and search engines have decreased slightly, possibly due to concerns around accessing trustworthy information from familiar brands. Aggregators have seen growth (+4%) alongside a slight increase in push notification/news alerts (+1%), while email newsletters and alerts have also remained steady with one in eight respondents (12%) receiving updates of some sort via email. These figures around direct traffic to websites, news alerts, and email updates can all be considered as "opting in" to a brand, and suggest that actively seeking out familiar outlets remains a strong steering force in how and why people seek out news content in the way they do, while social media and aggregators complement these access routes.

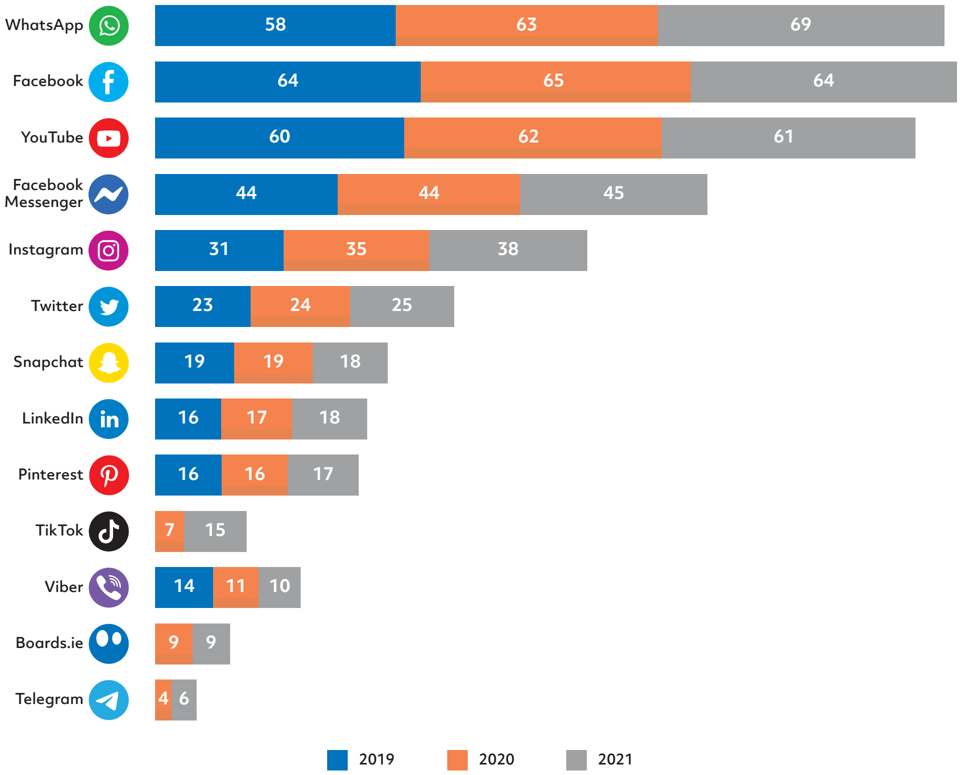
FIG 51: MAIN METHOD OF FINDING NEWS STORIES ONLINE BY SELECTED AGE GROUPS



Q. Which of these was the **MAIN way in which you came across news in the last week?**

When we look at the main access routes broken down into the two age brackets of young adults (18-24) and over 65s, we can see clear differences in consumption habits. Direct access via the news website or app is the main method for the over 65s (47%), but drops to just 14% of young adults. For that younger cohort, we can see that almost one in three (30%) instead describe social media as the main source of news online. Search engines are more popular among young adults than the over 65s, which suggests that younger adults are more reliant on third-party platforms rather than the brands themselves. The older audience seemingly prefer a more direct link to news outlets, and have a slightly heavier use of news alerts and email newsletters, although the difference between older and younger respondents is marginal here.

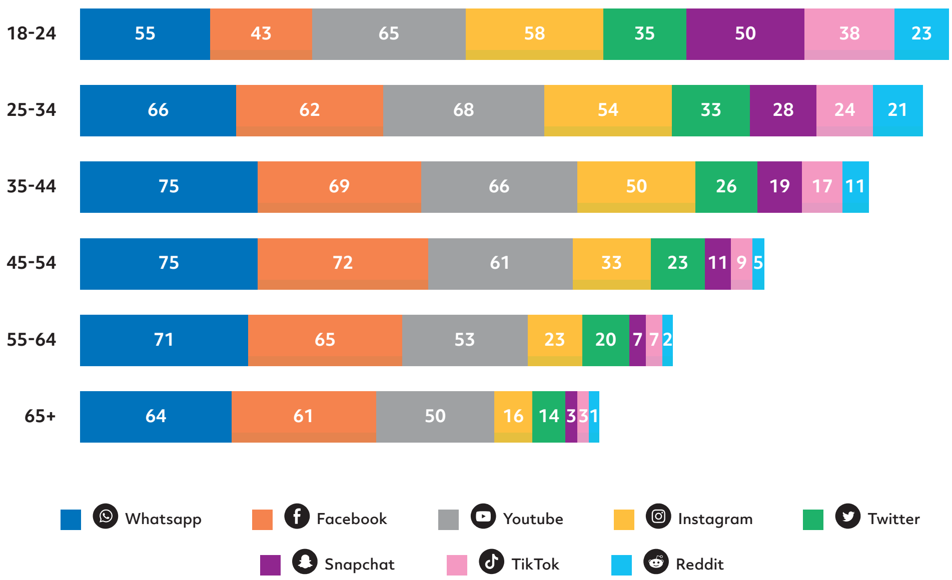
FIG 52: SOCIAL MEDIA USED FOR ANY REASON BY YEAR



Q. Which, if any, of the following have you used for any purpose in the last week? Please select all that apply.

Looking at the prevalence of social media, WhatsApp (+6%) has become the most popular platform, with more than two-thirds of Irish audiences using it for any purpose. It, along with Facebook and YouTube, are the three leaders as has been the case since 2019. Facebook Messenger, the messaging interface within Facebook, comes in next at 45 per cent. Regarding other distinct platforms, Instagram is the most popular of the remaining services, with some growth on last year (+3%). However, the biggest increase of the year is clearly TikTok, a social network which allows users to upload and share short videos; it went from 7 per cent in 2020 to 15 per cent in 2021. No social media platform saw any major decline in audience usage, suggesting audiences are finding the space in their media diets to incorporate additional social networks, rather than totally abandoning any.

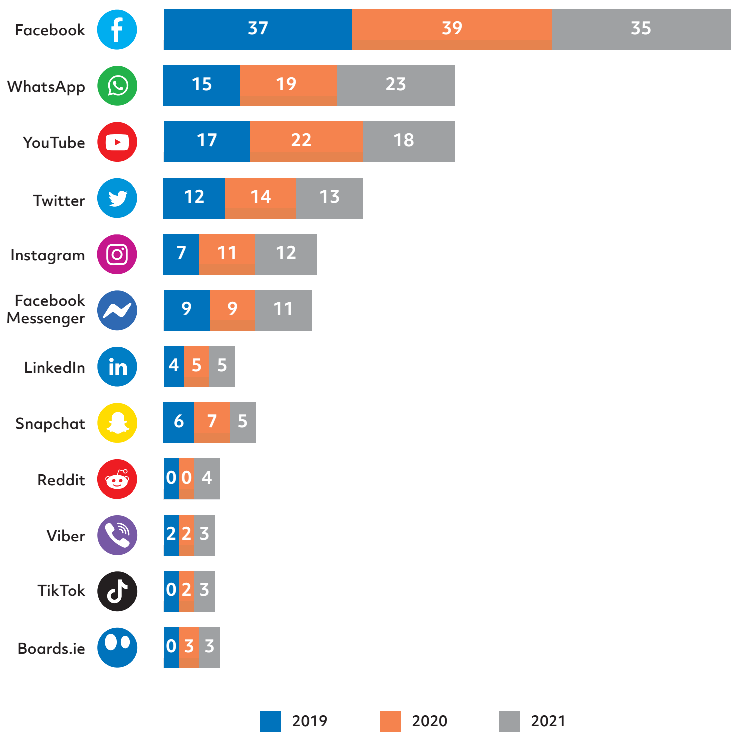
FIG 53: SOCIAL MEDIA USE BY AGE



Q. Which, if any, of the following have you used for any purpose in the last week? Please select all that apply.

When social media usage is broken down by age, there are two key patterns to observe. Firstly, most of the social networks have less usage among older groups: this is visible with Instagram, Twitter, Snapchat, TikTok and Reddit, where there is clear linear decline in older cohorts as audiences age. However, for the three major social networks and platforms - WhatsApp, Facebook, and YouTube - the pattern is a bit more complicated. All three social media increase in usage initially, peaking for those aged 35-54, before declining again, yet all three platforms are still reaching more than half of the over 65s.

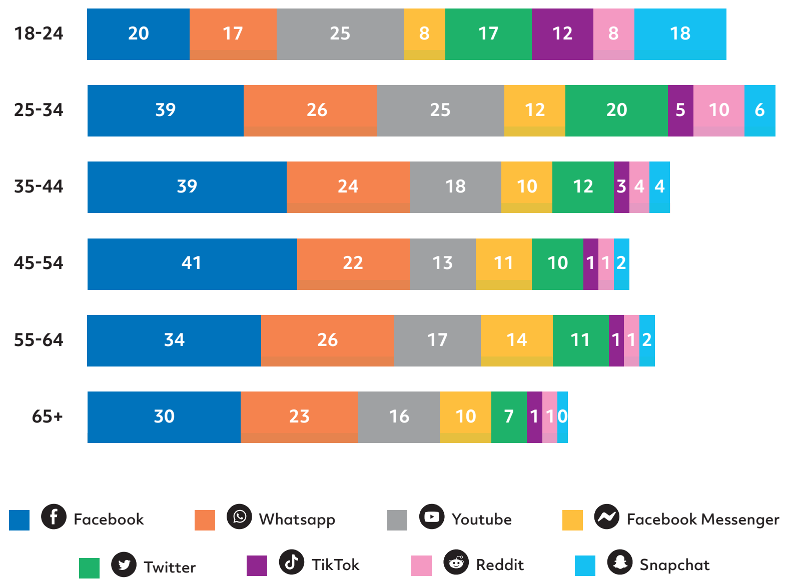
FIG 54: SOCIAL MEDIA USE FOR NEWS BY YEAR



Q. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply.

This question asked respondents to consider their social media usage in relation to news consumption. Facebook has declined in popularity since last year (-4%), as has YouTube (-4%), Twitter (-1%), and Snapchat (-2%); some of this may be connected to concerns over COVID-19-related content being disseminated in such spaces where sources may be unknown or not trusted. By contrast, WhatsApp and Facebook Messenger both saw increases on last year, reinforcing a trend towards private consumption and sharing of news, and the desire to access information which is circulating in more closed spheres, most likely from trusted friends and family.

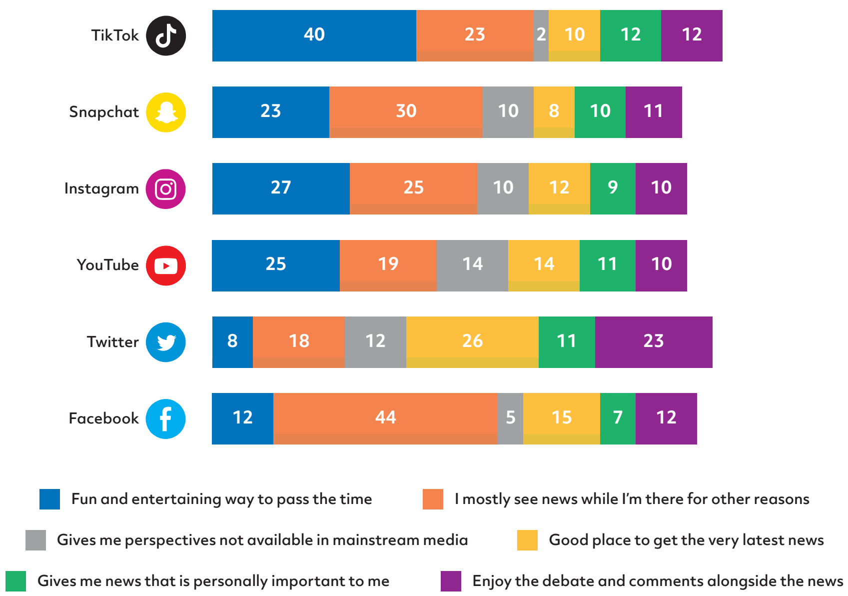
FIG 55: SOCIAL MEDIA USED FOR NEWS BY AGE GROUP



Q. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply.

When social media usage for news is broken down by age group, we can see again how Facebook peaks for those aged 45-54 (41%), but exceeds 30% for all groups apart from the 18-24 years olds, in which Facebook drops to one in five using it (20%). Both WhatsApp and Twitter are most popular among respondents aged 25-34, and this group are the heaviest overall users of social media for news, followed by the 18-24 year olds. This youngest age group is the only category for whom YouTube is the most popular, and there is generally a more even distribution among these users, with Reddit, TikTok and Snapchat all popular alongside the better known platforms. This indicates that for younger audiences, news is woven into their multiple social networks, suggesting all these platforms are key ways in which they keep up to date.

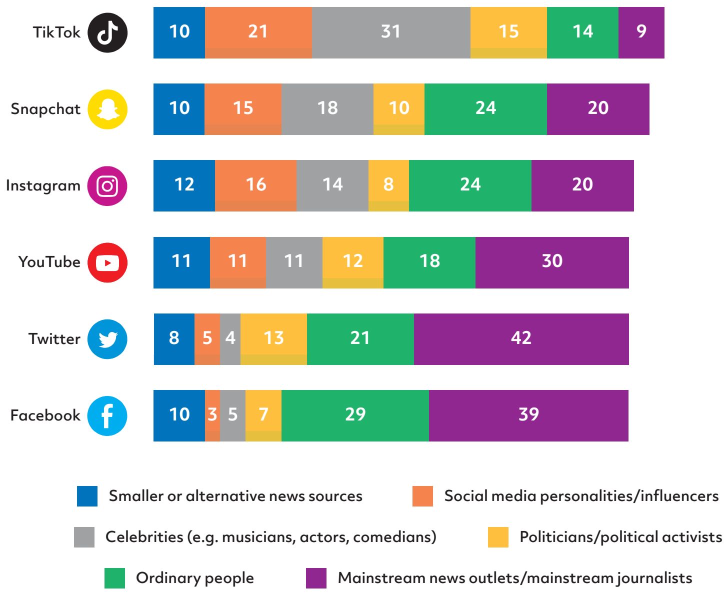
FIG 56: MOTIVATIONS FOR USING PLATFORM FOR NEWS



Q. You said that you use ____ for news... What is the MAIN reason that you use ____ for news?

We have seen how much Irish audiences use the various social networks and platforms generally, but respondents were also asked why they used each network to access news. TikTok, and its format of short videos, is seen primarily as a fun space and an entertaining way to pass the time; a similar motivation that is the main reason given for using both Instagram and YouTube. Facebook and Snapchat, meanwhile, benefit from incidental news exposure, where people are there for something else (likely social interaction with friends) and end up seeing news content. Meanwhile, Twitter offers something else for audiences: it is seen as the best platform for getting the latest news, and users also value the debate and commentary that is part of the Twitter space. YouTube is highlighted as the platform that users are most likely to use because of its ability to provide audiences with perspectives not available in "mainstream" news. Audiences also seem to value accessing news that is "personally important to me", with TikTok seen as the best for that (12%), and Facebook the lowest (7%).

FIG 57: MOST ATTENTION PAID TO SOURCES BY PLATFORM



Q. You said that you use ___ for news… When it comes to news on ___ which of these do you generally pay most attention to?

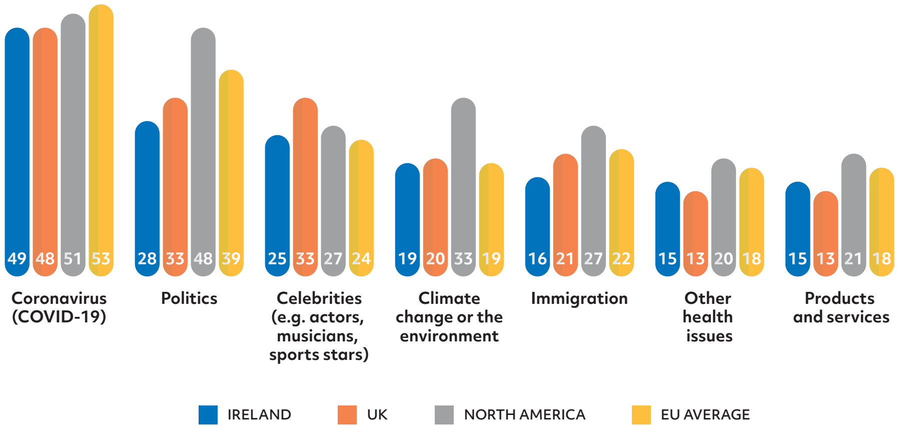
Regarding each social media platform, respondents were asked who they pay the most attention to in these spaces. Celebrities are most influential on TikTok, and it is also the space for social media influencers and politicians, three categories of sources which are not necessarily directly related to a news outlet or professional journalism. Smaller/alternative news sites have most influence on Instagram, whereas mainstream news and mainstream journalists receive most attention on Twitter. Ordinary people have a steady influence across all six platforms illustrated here, with most attention being paid to them on Facebook. For Facebook overall, we can see that it is the combination of ordinary people and mainstream news outlets which comprise the majority of source attention from audiences (68%), compared with these two categories comprising just 33% of sources on TikTok. The other platforms generally have a more even distribution of influential sources.

SECTION FIVE

IMPACT OF COVID-19

This section groups together questions and answers related to COVID-19 and its effects on news coverage.

FIG 58: TOPICS OF FALSE OR MISLEADING NEWS SEEN IN THE LAST WEEK

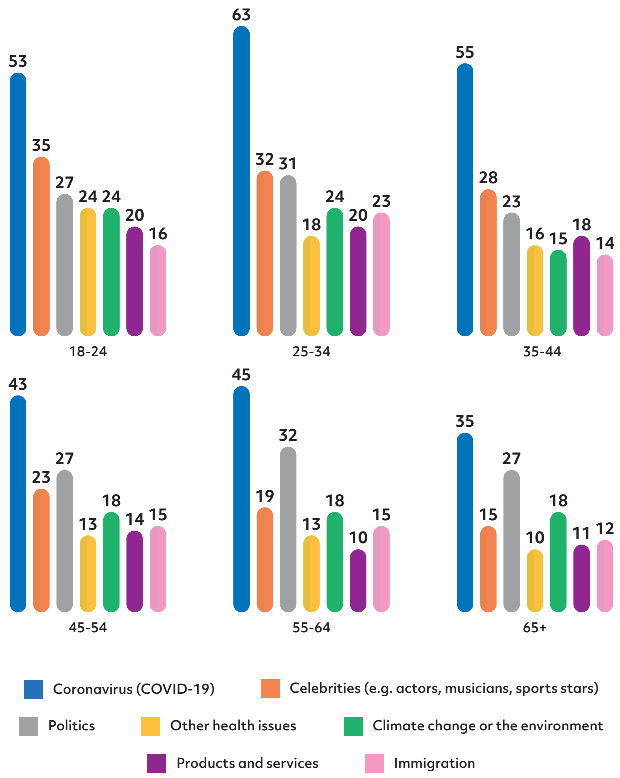


Q. Have you seen false or misleading information about any of the following topics, in the last week? Please select ALL that apply.

For Irish news consumers COVID-19 tops the bill for false or misleading information seen in the last week (49%) followed by the category of politics (28%). False or misleading information about COVID-19 is highest in all of our selected countries. For North America misleading information is also very high regarding politics (48%) and climate change/environment (33%).

The categories of politics, climate change, immigration, products and services and other health-related issues are push button topics reflecting US polarisation after years of a Trump presidency.

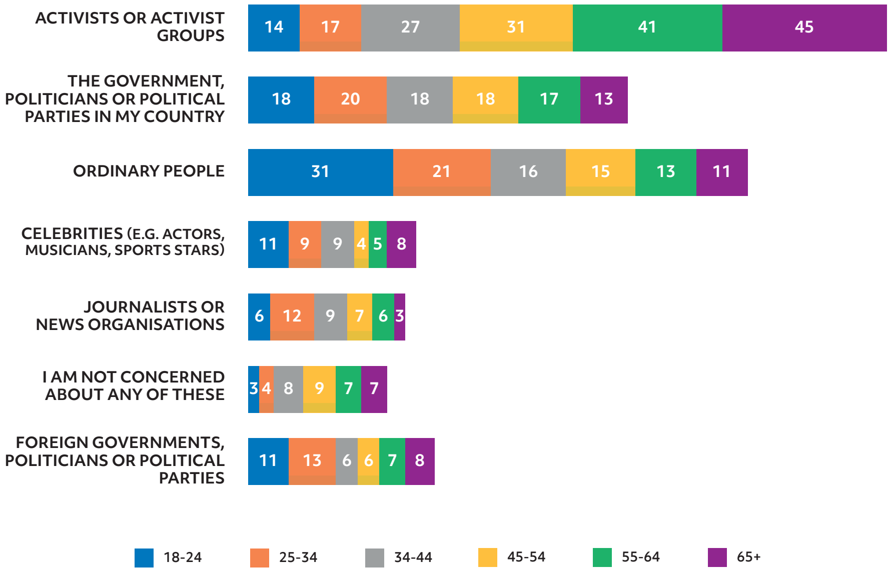
FIG 59: TOPIC OF FALSE OR MISLEADING INFORMATION SEEN BY AGE GROUP



Q. Have you seen false or misleading information about any of the following topics, in the last week? Please select all that apply.

All age groups are seeing the most false or misleading information on the topic of COVID-19. This underlines how the pandemic has instigated an avalanche of material designed to influence and disturb consumers about the nature, danger and solutions to the global problem. The age group in Ireland that reports seeing the most false or misleading information about COVID-19 is the 25-34 year old category (63%); but numbers are high across all the younger age groups (from 18-44 years). Younger age groups are seeing the most false or misleading information across all the different categories because of their higher reliance on social media as sources of news.

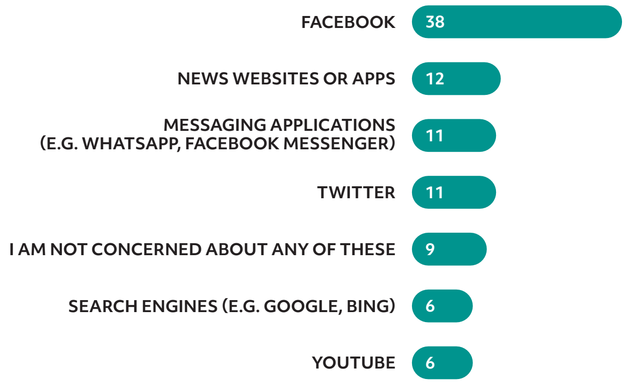
FIG 60: MOST CONCERNING SOURCES FOR FALSE OR MISLEADING COVID-19 INFORMATION BY AGE GROUP



Q. Thinking specifically about coronavirus (COVID-19) and its effects, which of the following sources, if any, are you most concerned about online? Please select one. False or misleading information from...

Happily for journalists and news organisations, they attract little concern from consumers regarding false or misleading information about COVID-19. This shows a great deal of confidence in professional reporting to check and verify information. But there is a big trust gap between these scores and those for 'activists or activist groups' in older media consumers. 45 per cent of the 65+ age group worry about activists or activist groups and 41 per cent of the 55-64 age group agree. On the other hand young people are not nearly as concerned about activists but are more worried about 'ordinary people' followed by 'celebrities', and 'foreign governments, politicians or political parties'.

FIG 61: MOST CONCERNING PLATFORMS FOR FALSE OR MISLEADING COVID-19 INFORMATION



Q. Thinking specifically about coronavirus (COVID-19) and its effects, which of the following, if any, are you most concerned about online? Please select one. False or misleading information via…

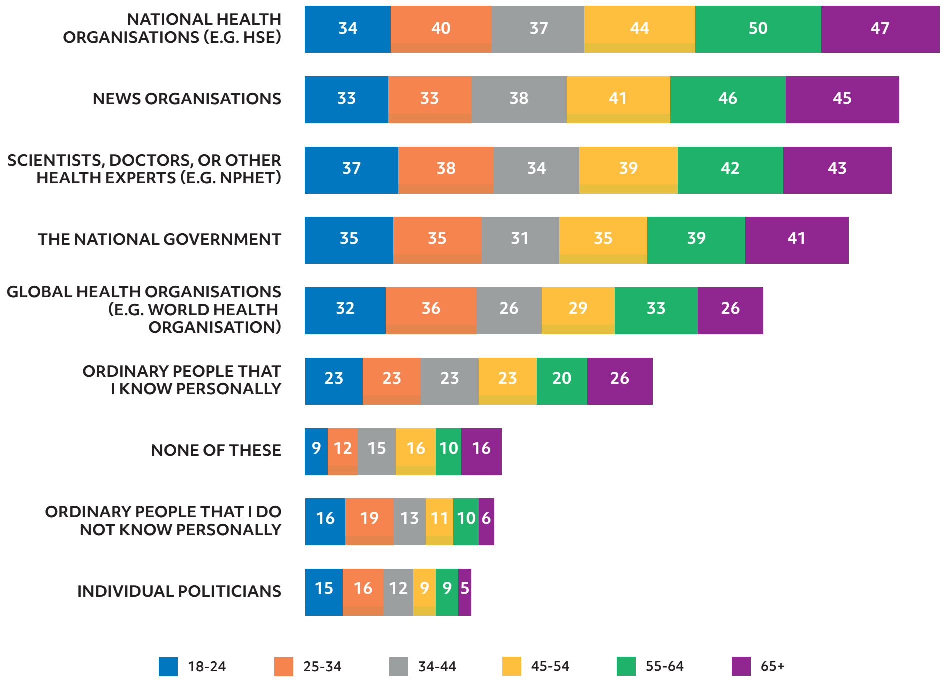
Facebook is the main platform that has caused the most concern regarding COVID-19 false or misleading information. Despite its efforts to stamp out false information, and the creation of an 'Oversight Board,' Facebook is still seen as a problematic platform for the spread of rogue information. These data demonstrate a big trust gap between concern with news websites or apps (12%) and Facebook (38%). Twitter, a fast, breaking news platform rates just 11 per cent concern, alongside messaging apps. Search engines and YouTube are not very concerning with regards to COVID-19 misinformation.

FIG 62: COVID-19 INFORMATION SOURCES

Q. Which, if any, of the following have you used in the last week as a source of news or information about coronavirus (COVID-19)? Please select all that apply. This could be by going directly to websites or apps, using social media, search engines, video sites or messaging apps, or in person.

The HSE, news organisations and 'scientists, doctors, or other health experts' [e.g. NPHET] all trump 'the national government' as sources of news or information chosen in regards to COVID-19. This is not such good news for a new coalition government that took power in mid-2020 and has worked hard to get its health messages across to the public in this pandemic year. 'Individual politicians' also come further down the list than two categories of 'ordinary people'. By contrast, health experts, doctors and scientists score well as COVID-19 information sources, and some of the heads of these organisations are now household names after frequent and lengthy televised news conferences and briefings. News organisations should also take heart from these data.

FIG 63: COVID-19 INFORMATION SOURCES BY AGE



Q. Which, if any, of the following have you used in the last week as a source of news or information about coronavirus (COVID-19)? Please select all that apply. This could be by going directly to websites or apps, using social media, search engines, video sites or messaging apps, or in person.

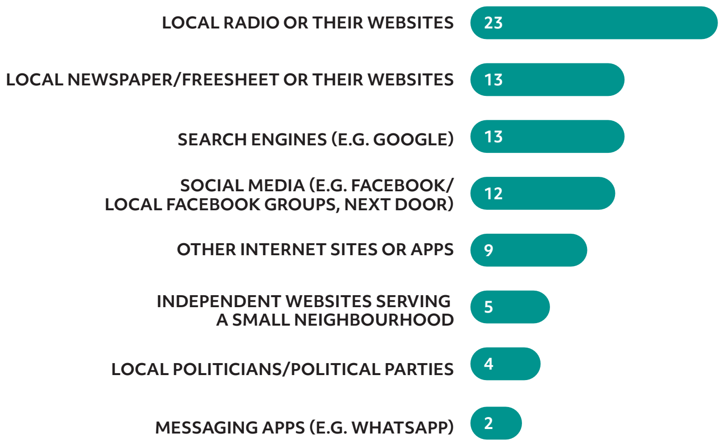
Older age groups use information from health experts and institutions, news organisations and the national government more than do younger people. For example 55-64 year olds scored highest in using information from the HSE (50%). In the 18-24 age group this was 34 per cent. News organisations scored well, in particular with those 55+. In terms of known 'ordinary people' all categories had similar levels of use. But in terms of unknown 'ordinary people' and 'individual politicians' younger people used their information more heavily than older people, especially those 65+.

FIG 64: LOCAL NEWS TOPICS ACCESSED IN LAST WEEK

Q. Thinking about local news and information, which of the following topics have you accessed in the last week? Please select all that apply.

COVID-19 came out second in the list of local news topics accessed in the last week (46%), trumped only by local weather (55%). A local take on coronavirus was particularly important at times in 2020 when the number of COVID-19 cases varied widely across the country, and lockdowns were sometimes locally based at county level. Again in January 2021 consumers would have been interested to know how the vaccine rollout was going to be conducted in their local areas. Nationwide lockdowns would also have focused people's attention onto their immediate vicinity, given that inter-county travel was not permitted. Many topics of local news would have been affected differently during lockdowns such as crime figures, shops and restaurant information, school openings and local jobs. Local media are still very useful for targeted, community-based news and information.

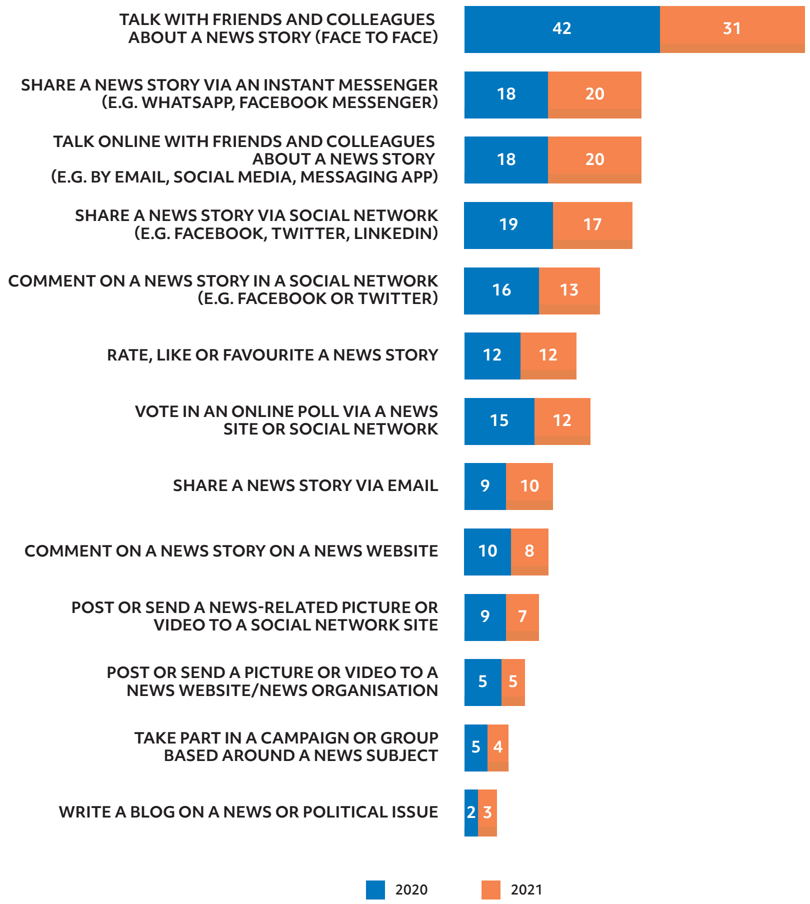
FIG 65: SOURCES FOR LOCAL INFORMATION ABOUT CORONAVIRUS OR HEALTH NEWS



Q: Thinking about local information about coronavirus or health news, which of the following sources have you accessed in the past week?

The sources used to access local information regarding COVID-19 or health news show a marked preference for local radio stations and their websites (23%), above the category 'local newspapers, freesheets or their websites,' 'search engines' or 'social media'. Local radio is easy to access during a pandemic, and does not require a trip to the shops to pick up a newspaper. Local politicians and political parties have not done well with this question and more work may need to be done for them to get their messages out. On the other hand, they may not have seemed like the source of likely expertise or information on this particular topic. NB we removed the 'local TV and/or its websites' category because we decided it might reflect a misunderstanding as local TV does not exist in the same way in Ireland as it does elsewhere.

FIG 66: PARTICIPATION WITH NEWS 2020 AND 2021



Q. During the average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply.

The pandemic has also affected news participation over the past year, particularly in terms of how people share news with others. Lockdowns have meant that the number of people who used to talk to friends and colleagues face to face about news stories has gone down nine points (from 42% to 31%). On the other hand, the number of people sharing news online via 'an instant messenger' or online methods such as email, social media, and messaging apps have gone up two points (to 20%) while sharing or commenting on posts via social media are both down. Commenting on stories on news websites is down two points (to 8%) and writing a blog on a news or political issue is extremely low, going up just one point (to 3%).

Paying for news in Ireland

By Hugh Linehan

This year's Reuters Digital News Report brings good tidings for Irish media companies who are pursuing a paid subscription model. After remaining static between 2019 and 2020, the percentage of Irish respondents who say they have paid for digital journalism has risen in the last 12 months, from 12 per cent to 16 per cent. That rise is well ahead of the overall EU increase in the same period and compares positively with the situation in the UK, a market with which Ireland is often compared and with which it to some extent overlaps, where only eight per cent have paid for news.

The increase can be largely explained by two factors. The profound impact of COVID-19 – remote working, restrictions on physical retail and a shift to online consumption – drove traffic and subscriptions to record levels in the first phase of lockdown. Simultaneously, in February 2020, Independent News and Media (now Mediahuis Ireland) introduced a subscription charge for independent.ie, the platform for the country's most-read daily and Sunday newspapers, the *Irish Independent* and *Sunday Independent*. The *Irish Examiner* (part of the *Irish Times* Group) followed suit in March 2021. As a result, all quality newspapers published in Ireland now require a paid subscription for full access, although there are significant differences in how this is implemented across different titles.

The Reuters data are particularly valuable because information on what is happening in the digital news marketplace can be opaque, if not misleading. News organisations have become coy about divulging detailed numbers for subscriptions, circulation and traffic, and prefer to offer topline figures that put the best gloss possible on complex datasets covering different subscription packages, print/digital bundles and special introductory offers.

But, after years of strategic muddle and confusion, Irish newspapers have arrived via a number of different routes at a shared point of clarity on the road ahead. The chimera of a purely ad revenue-based model has been abandoned and the importance of the loyal paying reader has been reaffirmed. The clarity is welcome but is accompanied by the reality that newspapers are now part of a complex digital subscription marketplace. In Ireland they must pivot from the one-to-many model of single-issue print sales, to managing one-to-one relationships from scratch with tens of thousands of readers who are now also customers. Subscriber acquisition is a never-ending challenge, churn (the loss of a percentage of subscribers over every cycle) a constant threat. With advertising under continuing pressure, the digital subscriber becomes the primary focus of the business.

What does this mean for journalists and journalism? In print's heyday, many reporters affected ignorance about the revenue model which sustained their profession. Two decades of disruption, decline, budget cuts and job losses have provided a painful education in those realities. But a recurring complaint in newsrooms over that period was that we were "giving our journalism away for free". Most journalists, therefore, are glad to see subscription being introduced. The idea that news has value, that it should be paid for, strikes them not just as financial common sense but as an existential truth. Some may also welcome the rebalancing of the revenue model away from the advertiser and towards the reader, although the reality of what this ultimately means for the viability of the business may be less comforting. Finally, amid rising unease over the role of social media in amplifying disinformation and division, many will support a strategy which seems less reliant on algorithm-driven clickbait.

However, Ireland, as a small English-speaking country with a population of under five million, presents a challenge for any nationally-specific digital media business that seeks to achieve financial viability (the same is even more true for local media, as the grim figures for that sector show). The challenge is intensified by the country's historic openness to print and broadcast competitors from larger markets, reflected in the presence of the London-based *Times, New York Times* and others among the most popular titles for Irish subscribers. And the fundamental disruptions of digital are not going away: no matter how successful the strategy, average revenue per user (ARPU) will almost certainly be lower than it was in the print era.

The good news for journalists is that a subscription model can only succeed with sustained investment in high-quality original content. That means fewer commoditised articles which are available on "free" sites or on social media, and more stories that speak directly to the lived experience and concerns of readers. Meanwhile, as the focus turns towards building loyalty among digital subscribers, we will probably see increased emphasis on podcasts, live events and email newsletters. And many newspaper sites and apps still fall short of the "premium" user experience they promise, so investment in the 'tech stack' – to streamline production processes - is also required.

This new world has its own potential pitfalls. In the US, political polarisation may have helped drive massive subscriber growth for the *New York Times* and *Washington Post*, but it has also pushed them towards a more uniformly partisan affiliation. Might digital subscribers here demand similar adherence to a particular set of views and values? That could threaten the fundamental concept of the general interest newspaper as a broad church of views and perspectives.

There are also legitimate concerns that subscription could see access to quality journalism becoming the preserve of economic and social elites, leaving much of the population in permanent information poverty. Interestingly though, this year's report suggests less of a disparity than might be imagined between different socio-economic groups' propensity to pay: 22 per cent of those in the highest income group currently pay for news, compared to 15 per cent in the lowest. However, the fact remains that, of the more than 80 per cent of people who do *not* currently pay for news, roughly four out of five say they are unlikely to do so in the future. That means almost two thirds of the population currently rejects the product which news media are now offering – a bleak reality which cannot be ignored or wished away. The nub of the matter for news media may come down to how many of these people can be persuaded to change their minds. Will public attitudes change, as has happened already with music and film streaming? The bad news internationally is that countries without a prior history of widespread print subscriptions find making that change more difficult. The good news, judging by the figures in this report, is that Ireland, at least for now, may be bucking that trend.

Hugh Linehan is Arts & Culture Editor at The Irish Times *and presents the Inside Politics podcast.*

Long Live Television – a trusted COVID-19 source of news

By Prof Colleen Murrell

In a Back to the Future moment, in 2021 television news bulletins have evolved into old-fashioned 'appointment viewing'. The Reuters Digital News Report (DNR) data show that in January and February, when this year's surveys were in the field, a number of European countries witnessed a marked jump in TV news viewing – including in the UK, France, Germany, Spain, Norway and Denmark. In Ireland 41 per cent of those polled reported that TV was their 'main news source', up eight percentage points from pre-lockdown January and February 2020. This is great news for broadcasters. But is this jump significant or is it just a momentary blip in an otherwise downward trend in which Irish news consumers continue to withdraw from television and move online over time?

The public broadcaster, RTÉ, is very much hoping not. In this year's DNR data for Ireland, RTÉ TV News came top in the 'Trust in news brands' category at 78 per cent positive, with other television broadcasters in this order: BBC 76 per cent, Sky News 72 per cent and Virgin Media News 71 per cent. RTÉ TV News was also top in the 'Main traditional news brand used,' and the 'Most frequently used traditional brand'. Furthermore, it would seem to have little to fear from the online world as RTÉ News Online also topped the 'Most frequently used digital brand'.

A large part of the boost to RTÉ's audience figures comes down to its place as the national public service broadcaster, the top trusted brand for information during times of crisis. The public has shown an appetite for COVID-19-related news - from televised government press conferences to briefings from the HSE and NPHET concerning lockdowns and vaccine announcements. This was reflected in March 2020 when the St Patrick's Day COVID-19 speech by then-Taoiseach Leo Varadkar clocked 1.6 million viewers. The subsequent RTÉ Nine O'Clock television news bulletin was watched by 1.3 million,[1] up 200 per cent on the previous year's bulletin.

This trust in RTÉ's COVID-19 information is also backed up by data from sources like the 'Amárach Public Opinion Tracker[2] for the Department of Health'. Over the past year (March 2020 – March 2021) in answer to a question asking for the 'main media sources' for information on the virus, RTÉ never fell below 86 per cent. The next top three were Virgin Media (range between 17% and 43%), the *Irish Times* (23% - 27%) and the *Irish Independent* (24% - 25%).

Higher than normal RTÉ figures are mirrored more widely by public service media organisations (PSM) across Europe. A report published by the European Broadcasting Union[3] (April 2020) tallied audience figures from 29 PSMs via their main evening TV news bulletins. It found that on days when key announcements were made about COVID-19 restrictions etc., the reach of PSMs was 2.5 times higher than on days without announcements. In comparing March 2019 to March 2020, daily viewing of PSM evening news bulletins was up 20% overall. In the 'youth' category (15-24 year-olds), viewing was up 44% and in 'young adults' (25-34 year-olds) it was up 53%.

1 https://www.irishexaminer.com/news/arid-40204748.html
2 https://www.gov.ie/en/collection/6b4401-view-the-amarach-public-opinion-survey/#
3 https://www.ebu.ch/files/live/sites/ebu/files/Publications/MIS/login_only/psm/EBU-MIS_COVID-19_Crisis_PSM_Audience_Performance-Public_UPDATE.pdf

So, amidst all of this good news, what to do about the national licence fee? Firstly, RTÉ is suffering from a loss of advertising revenue, and secondly more than a quarter of a million people evaded the licence fee payment last year, which cost RTÉ an estimated €50 million[4] in lost revenue. In Ireland's 'Future of Media Commission' public inquiry earlier this year, RTÉ argued[5] for a "device-independent Media Charge, payable by all households" to fix the problem of those people not owning a television and thereby not being liable to paying the current licence fee. It noted, "PSM funding trends across Europe show that a fee, as opposed to direct exchequer funding, provides for greater stability of funding over time".

In the meantime, beyond news, in the wider RTÉ organisation, some €60m in internal cuts to production are on the horizon, signalled by RTE's 'Revised Strategy 2020-2024'[6] in which "the future of RTÉ, and public service media, is a new blend of complementary live and on-demand services, offering audiences compelling and varied programming and content, at times and on devices that suit them". But research about the wider field of television is more gloomy, and according to the Independent.ie[7], ComReg research shows, "40 percent of Irish people are either watching less traditional television or have given it up altogether due to online streaming alternatives".

If RTÉ gets its proposed 'Media Charge', then each household in Ireland would be billed whether or not it owned a television, and RTÉ would secure its funding for more sustained resourcing and Irish-made programming. However, it is no certainty that it would thereby secure its *viewers* in a coronavirus-free future. Will the young, who have recently shown such interest in RTÉ TV news (up eight percentage points since 2020), stick around to watch the rest of the fare, or will they be forever seduced by the likes of Netflix and Disney+? This last year they have been glued to the family sofa during three lockdowns, but once released, they might stray from 'Aunty RTÉ'.

RTÉ makes a strong case for its television and radio journalism and also for its online and mobile media services for smartphones, tablets and desktops. It will need to keep refreshing its online platforms and reaching out to audiences via social media, if it is to profit from this sudden renewed interest among the young. The BBC turns 100 next year and as an organisation it has constantly worried about its 'next generation' of listeners, then viewers, then digital consumers. However, it is still there, and, as a PSM corporation, it is still under constant scrutiny by politicians and the public alike. In terms of its central place in the national psyche, we should expect the same longevity from RTÉ – as a national broadcaster whose job remains to inform, educate and entertain. Informing and educating have never been as important as they are right now, when up-to-date news about COVID-19 is vital to all our lives, and governments themselves must remain under our collective scrutiny.

4 https://www.thejournal.ie/tv-licence-evasion-cost-per-year-5263539-Nov2020/
5 https://futureofmediacommission.ie/wp-content/uploads/289.-RTE-Submission_Redacted.pdf
6 https://about.rte.ie/wp-content/uploads/2019/11/RT%C3%89-2024-Web.pdf
7 https://www.independent.ie/business/technology/news/impact-of-streaming-services-revealed-as-40pc-now-watch-less-traditional-television-40259591.html

Diversity and representation: Do audiences like what they see?

By Dr Dawn Wheatley

Irish people can be hyper-sensitive to how the nation is portrayed and perceived internationally: just when we feel like we have moved on from the freckled faces, overload of twee or drunken stereotypes, we remember that 2021 was the year *Wild Mountain Thyme* landed on Irish streaming services. Film critic Donald Clarke referred to its “fascinatingly deranged attitude to contemporary Ireland”, and there was eye-rolling galore: for many, the film simply wasn’t a reflection of their life and experiences in Ireland. We shudder when Hollywood gets us wrong, but that sense of discomfort and frustration around misrepresentation can feel ever-present even closer to home, trickling down to daily news output. But what if we simply *never* see elements of our identity present in Irish media?

This is the first year in which the Digital News Report has asked for attitudes around how well people feel they are represented in the news. Respondents were asked about six dimensions of their identity: their gender, age group, ethnicity, where they live, political views, and social and economic class. Firstly, they were asked if they felt there was enough coverage of each of these dimensions and, secondly, if the coverage was fair.

For many of us consuming news media in the COVID-19 era, the constant presence of senior male political and medical figures is an enduring memory: since March 2020, two Taoisigh, two Tánaistí, two Ministers for Health, a Chief Medical Officer, an acting Chief Medical Officer, Director-General of the HSE, and the Chair of the Irish Epidemiological Modelling Advisory Group have all been male. We know that, generally, men are more present in news coverage, often at a ratio of 3:1[8], so it is unsurprising that many female respondents (18%) feel under-represented in terms of gender balance in the news. Nonetheless, one in eight men (12%) still feel underrepresented, serving as a reminder that perception – rather than reality – is an important driver in how people interpret issues of sufficient representation in the news.

When asked about how their age group is represented, 45-54-year-olds were the most content (only 16% said there was not enough coverage); conversely, young adults aged 18-24 were most unhappy with 34 per cent saying there was not enough coverage, well ahead of the next group which felt most underrepresented (the over 65s at 24%). Crucially, it was also this same young adult category who felt the most injustice: 47 per cent felt unfairly covered in news media, almost 20 percentage points higher than the next age category (28% among 25-34-year-olds). While teenagers’ and young adults’ frustration at media stereotypes is nothing new, the past year provided a particular reference point worth highlighting, notably coverage of college students – who had made huge social and educational sacrifices – socialising and potentially breaching COVID-19 guidelines. When these two survey responses are combined, it suggests that this youngest cohort feels regularly overlooked in news coverage and many feel that what is published or broadcast is misrepresentative. Such frustration should act as a caution for news producers: this is a curious, open-minded generation finding their place in the world, and settling into news habits that they could stick with – or avoid – for decades.

Ireland is a relatively small country geographically, but that does not mean that audiences do not expect to see their home areas represented. One in three (32%) of those in Connaught and part of Ulster feel that there is not enough coverage of where they live, while that concern gradually

8 Global Media Monitoring Project 2020: https://whomakesthenews.org/gmmp-reports/gmmp-2020-reports/. Based on the provisional international results of more than 120 countries, women comprise approximately 26% of news sources/subjects. The not-yet-published results for Ireland are 28% female sources/subjects.

declines through Munster (28%), Rest of Leinster (27%) and Dublin is lowest at 21 per cent, while 11 per cent of those in Dublin believe there is actually *too much* coverage of the capital. These results could fuel concerns around perceptions of a Dublin-centric media; it may also fit into debates around regional correspondents, and journalists being overly influenced by easily accessible events and institutions in Dublin rather than striving for regional spread. However, it is important to note that the majority in all four provinces (between 53%-59%), said there was "about the right amount of coverage".

Potential political prejudice in the media is always contentious, and for all those claiming liberal media bias, there will be those claiming conservative values and establishment loyalties prevail. When respondents were asked how their political leanings are covered in the media, the cohort most unhappy is those describing themselves as "fairly left-wing", and "very left-wing": 23 per cent and 35 per cent respectively said that there was "not enough" coverage, compared with 14 per cent who described their political leanings as "centre". Those on the left were also more likely to feel the coverage is unfair.

The results around perceptions of fairness of coverage for "people of your social and economic class" is also worth highlighting: among those on low incomes, only 48 per cent feel their social and economic class is fairly represented, compared with 69 per cent of high earners. There is also disparity in attitudes towards the level of coverage: two-thirds (67%) of those on higher incomes believe they receive adequate levels of coverage, while only 52 per cent of those on low incomes feel the same.

Finally, as illustrated elsewhere in the report, we know that 62 per cent of respondents overall are content with the level of coverage people of their ethnicity receive, while 63 per cent say coverage is fair. We do not have ethnicity data on respondents, so we cannot explore how this might fluctuate.

The addition of these questions in this year's survey will hopefully provide news outlets with valuable results to contemplate regarding who is included or excluded in content, and how these groupings are portrayed. "The news" does not just come together automatically as a mirror on society, but is the result of conscious and subconscious decisions by journalists and editors. Of course, it should be noted that most respondents are relatively content with what they are seeing, which is reassuring. Nevertheless, these results come amid a period of heightened public awareness around diversity and identity: mainstream news producers should be mindful that, as audiences fragment and navigate personalised, high-choice media environments with alternative sources aplenty, those who are unhappy can easily seek out alternative sources in which they feel more accurately represented.

Key decisions for the Future of Media Commission

By Dr David Robbins

Over the past year, media-watchers in Ireland could be forgiven for thinking that media commissions were like buses: you wait ages for one to come along, and then two arrive at the same time.

The first media commission is part of the Online Safety and Media Regulation Bill, a piece of legislation aimed at curbing online abuse and disinformation, while at the same time updating and expanding broadcast and streaming media regulation. The Bill envisages a new Media Commission – a kind of beefed-up Broadcasting Authority (BAI) with powers to curb harmful online content, and to licence (and levy) radio, TV, and streaming services[9].

The second media commission is less focused on regulation, and more on funding and economic viability. It has a complicated origin story: it began in 2019 as a government initiative in response to RTÉ's new strategy. Then Minister for Communications, Richard Bruton, established a Commission on Irish Public Service Broadcasting, to be chaired by former DCU president Brian McCraith. To many, the announcement looked like political long-fingering: when faced with a thorny problem – how to fund RTÉ – establish a commission.

With a new government came a new plan. In their programme for government in 2020, the Green Party called for Bruton's 2019 Commission to be expanded to "consider the future of print, broadcast, and online media in a platform agnostic fashion"[10]. Although independent, commercial print, and online media were now included, there was still a hat-tip to public service broadcasting, as the Green document also recognised "the important role of public service broadcasting in Irish life".

The Future of Media Commission was formally announced on November 20, 2020, with Prof McCraith still in the chairperson role. The Commission membership featured strong representation from the broadcast media. Of the two members with experience in legacy media, one resigned over a controversy related to his time as a newspaper editor (Alan Rusbridger, ex-Guardian), and the other was added after the initial membership was announced (Siobhan Holliman, Tuam Herald).

The Commission sought submissions from the public and other interested parties. Those submitted by media companies spelled out the precarious state of the news industry, as they continue to haemorrhage advertising revenue to the tech platforms of Facebook and Google. The *Irish Times*, for instance, noted that its print circulation had declined from 117,000 to 46,000 in a little over a decade, while the *Irish Examiner* sells just 18,500 print copies a day[11].

Over 800 submissions were received, from a wide range of parties, including public bodies such as the Broadcasting Authority of Ireland, the European Broadcasting Union, and the Irish Research Council, and from a range of media organisations, NGOs, religious organisations, and other civil society groups. The students and staff on the journalism programmes at DCU also presented a submission[12] outlining the views and recommendations of journalism students and educators.

9 https://www.irishtimes.com/business/media-and-marketing/bai-prepares-for-future-within-new-media-commission-1.4458311

10 https://www.greenparty.ie/programme-for-government/

11 https://futureofmediacommission.ie/wp-content/uploads/308.-Irish-Times-Submission.pdf

12 https://docs.google.com/document/d/13XPa5nJugOySNbT5hO9O-bhoBe5zeyZecYmo10Ilf9E/edit?usp=sharing

The Commission also held a series of six “thematic dialogues” – recorded online video contributions, followed by live Q&A sessions. The first two sessions were focused on public service media, and indeed throughout the dialogues, there was an emphasis on public service journalism, whether delivered by a public broadcaster or by independent, commercial publishers.

While the submissions of news organisations emphasised the need for indirect support by, for instance, lowering VAT on newspaper sales or subscriptions, and reforming the libel laws to reduce the exposure of the news media to large court awards, the tech companies who contributed to the dialogues emphasised the programmes they had set up to fund journalism, and the fact that platforms such as Google and Facebook direct large volumes of traffic to news websites.

More generally, discussion tended to revolve around how funding would be delivered to media companies in a way that did not compromise their editorial independence and ability to hold governments to account, while at the same time providing resources targeted at investigative or public service reporting, rather than amounting to a direct subsidy. Speakers recognised the need to fund journalism rather than simply deliver grant aid to companies.

The dialogues also brought welcome attention to the normative functions of journalism in democracies: informing the public, holding authorities to account, investigating wrong-doing, and providing a public sphere for the discussion of ideas. Several speakers also alluded to a relatively recent addition to these: countering online disinformation, especially in relation to COVID-19.

Many contributions, and questions from the public and Commission members, related to best practice in other countries. Remarks by Prof Rasmus Kleis Nielsen of the Oxford Reuters Institute for the Study of Journalism (publishers of this report) summed up well the policies shown to work elsewhere:

- Direct subsidies for local and regional news organisations;
- Indirect subsidies, such as reduced or zero VAT rates on news subscriptions or newspaper sales;
- Systemic support for training of staff, or industry research;
- Grants for individual journalistic projects, modelled on Arts Council system;
- Establishment of entirely publicly funded, multi-platform public service media;
- Promoting a non-profit model for the provision of public service content;
- Making public service journalism cheaper by lowering the cost of data access and FOI processes.

The Commission has been criticised for the lack of representation[13] from newspaper publishers and its focus on public service media (and relative neglect of commercial and independent media). It also might have given more attention to concerns that subscription models, such as those introduced by the two largest independent news organisations – the Irish Times and Mediahuis (publishers of the Independent titles) – can result in access to diverse and professionally produced news becoming the preserve of those on higher incomes[14].

The Commission is due to report by the end of the summer. Of course, those working in the media, or in media research and education, await its recommendations with interest. One question the government will have to address is how any funding or support for public service journalism will be administered – will it be by the "other" Media Commission, or by a new process, or a new independent body. It is not too dramatic to say that the survival of some news organisations will depend on these decisions.

13 https://www.thetimes.co.uk/article/mediahuis-ireland-boss-marc-vangeel-helps-inm-turn-the-page-0l0kqjm3f
14 https://www.newyorker.com/news/annals-of-communications/the-fate-of-the-news-in-the-age-of-the-coronavirus

Media Literacy and the Future of Media

By Dr Eileen Culloty

Policymakers are finally catching up with the dramatic changes in the media environment. The EU has proposed a suite of packages that aims to rein in the power of big tech companies while providing support for struggling media outlets. In Ireland, the Future of Media Commission is investigating how media can be sustainably funded while the Online Safety and Media Regulation Bill is currently undergoing pre-legislative scrutiny. This Bill will establish a new media regulator with a remit that includes online platforms.

These are important developments that will shape the media landscape for decades to come. They are underpinned by a belief that media play a central role in democratic and civic life and they are informed by concerns about the media's ability to fulfil that role in the digital environment.

A Funding Crisis

A core problem is that media outlets have not developed a way to make money online. Traditionally, news outlets relied on advertising to cover costs. That model has collapsed as digital advertisers no longer need media outlets to reach audiences. Instead, Google and Facebook dominate the market, largely thanks to their ability to collect data from users who enjoy free access to content.

Analysis by the marketing company Core found that Google and Facebook collected 81 per cent of all online advertising revenue in Ireland in 2019. That dominance squeezes out Irish media. The consequences are already evident as outlets have been forced to close or cut staff. According to Local Ireland, 16 regional newspapers closed over the past decade and employment in the sector halved. Without local media, court sessions and council meetings will go unreported. In the US, "news deserts" have emerged where there is no journalism coverage.

Various remedies are proposed including increased public funding for media and levies on tech companies. Media literacy is needed to ensure the public not only understand these issues, but also can contribute meaningfully to the debates.

Public Understanding

Evidence suggests there are major knowledge gaps in the public's understanding of media. In the 2018 Digital News Report, only 12 per cent of Irish respondents were aware that online news is generally not profitable. The vast majority (72%) did not understand that algorithms determine what news appears on Facebook feeds.

In this year's report, 37 per cent are aware that most news outlets are less profitable than they were 10 years ago, but the majority remain misinformed. That knowledge gap may explain why half of respondents say they are "not very" or "not at all" concerned about the financial state of commercial media.

Of course, a broad survey question about concern does not capture the nuances of public attitudes. Nor does it convey the nature of the problem. In all likelihood, if people were given context about the decline of media and the implications for democracy and their communities, levels of reported concern would probably be much higher.

Media literacy has a role to play in bridging the gulf between policy debates and public understanding. Traditionally, media literacy was defined as the ability to analyse, evaluate, and produce media messages. More recently, the concept has expanded in recognition of the fact that all spheres of life are now entwined with digital technologies. Being media literate is now tied to citizenship and people's capacity to engage in civic, social, and political life.

Media Literacy
In Ireland, there are great examples of collaborative projects that promote this empowering view of media literacy. Facilitated by the BAI, Media Literacy Ireland is an informal association of stakeholders working on different aspects of media literacy. It is currently running the Be Media Smart (www.bemediasmart.ie) campaign to counteract false information.

More than 80,000 secondary-school students have participated in a news literacy programme run by NewsBrands Ireland while TUDublin runs a news website, CLiC, for primary-schools. On this site, multiple literacies are targeted as children engage with news and current affairs while developing skills in reading and writing as well as civil participation in online comments. For adults, libraries across the country run talks and workshops while a range of NGOs provide targeted support to different groups such as the elderly.

No Quick Fix
Media literacy is often invoked as a solution to digital problems. This narrow view is misguided. Disinformation is a complex problem that extends far beyond its media and technological dimensions. Similarly, the financial crisis in news media will not be resolved simply by encouraging the public to become more conscious consumers. These are major policy issues and individuals should not be expected to shoulder the burden of acquiring new skills to offset the problems created by lax oversight of digital technologies.

However, members of the public do need to be involved in the debates about how media are funded and regulated. Expanding opportunities for people to develop media literacy is a first step to ensuring the public have meaningful participation in these debates.

Media Ownership in Ireland

By Dr Roddy Flynn

The Autumn 2020 launch of the Media Ownership Ireland[15] website by DCU and the BAI addressed an information gap noted as far away as Brussels (notably in the European Commission's 2020 Rule of Law Report). Now, the public can immediately access information identifying the 'Ultimate Owners' of every significant media outlet operating in Ireland and can map the full extent of the media holdings of individuals and institutions.

Keeping the site's underlying database current is chasing a moving target: scarcely had our January 2021 update gone live when Bauer Media acquired Communicorp, the largest private radio group in Ireland, the latest in a sequence of acquisitions since 2015 which have seen media ownership in Ireland take on a distinctly international flavour.

Although media mergers and acquisitions ceased almost entirely following the 2008 economic crash, 2015 to 2016 saw a number of high-profile changes in ownership. In July 2015, US cable giant Liberty Global acquired TV3 from UK equity firm Doughty Hanson. A month later, UTV Ireland was sold by its Northern Ireland parent UTV to the UK-based ITV PLC. Within a year, ITV sold on UTV Ireland to Liberty Global which – in 2018 – consolidated its three Irish channels under the Virgin Media television brand. Setanta Sports was sold to Eir in November 2015, which was in turn acquired by firms associated with French billionaire Xavier Niel in 2017. After UTV's television operation was acquired by ITV in 2015, its substantial radio holdings were reorganised as the Wireless Group. In July 2016 News UK acquired the entire Wireless Group (including its six local stations in Ireland) for £220m.

In effect then, by 2017, the press and broadcast outlets associated with businessman Denis O'Brien represented the major instances of indigenous media ownership. However, even he has now effectively exited the Irish market. In April 2019, the Belgian/Dutch newspaper publisher Mediahuis offered €145.6m for the Independent News and Media group, incentivising O'Brien and investors like Dermot Desmond to sell their stakes in their entirety. In consequence, with Bauer Media's February 2021 acquisition of Communicorp's Irish holdings, the bulk of Irish private media now lies in the hands of US, UK, and European companies. Only RTE (which is, by definition, not for sale) and the Irish Times Group remain in local hands, with the latter consolidating its position in 2018 when acquiring the Irish Examiner and a number of local radio stations via a takeover of the Landmark Media group.

O'Brien's exit arguably clarifies what was THE question for Irish media policymakers between 2006 and the passage of the 2014 Competition and Consumer Protection Act: how to deal with the extent of concentration of media ownership in Ireland. Before 1995, concerns focused around the dominant position of Independent News and Media within the print sector. However, between 1995 and 2008, virtually every local radio station and larger local newspaper were subject to merger and acquisition activity. Often held in family or private hands for decades (and in some cases for more than a century) individual stations and papers were consolidated into media groups under the gaze of a Competition Authority which largely based its assessments on advertising market impacts. The question of whether this was necessarily healthy for media plurality in Ireland was thrown into sharp relief after 2007 when Communicorp's acquisition of EMAP's radio holdings meant it owned both of the commercial national radio stations, while owner Denis O'Brien simultaneously built a personal stake in Independent News and Media that would make him the single largest shareholder.

15 http://mediaownership.ie/

The response was to add new provisions for dealing with media mergers into the 2014 Competition and Consumer Protection Act. This act, informed by a 2008 Advisory Committee on Media Mergers Report, was perceived in some quarters as too little, too late because the 2014 Act did not apply retrospectively and thus could not address Mr O'Brien's position. Yet, the narrow focus on one individual disguised the need to consider the influence enjoyed by other players in the Irish market.

Notably, all of the post-2014 activity described above was subject to the sanction of the Ministers for Communications of the day. Given that Liberty Global's TV3 and UTV Ireland acquisitions consolidated the Irish commercial television sector in the hands of one company, there might have been grounds to withhold such approval. The same might have been true of News UK's takeover of the Wireless Group, given that it placed the third largest radio group into the hands of a company which already enjoyed a prominent position in the Irish newspaper, television and distribution markets (through the Irish Sun, the Sunday Times and Sky). In both cases the Competition and Consumer Protection Commission concluded that the mergers would not substantially lessen competition in any market for goods and services in the State.

However, both mergers came at a point when the Irish economy was only starting a tentative recovery from austerity, and that has meant that various Ministers for Communication have also had to balance the need for plurality of media ownership against the sustainability of media outlets. Indeed "sustainability" has been identified as a particular consideration for the BAI since the publication of its 2017–2019 Strategy.

How much plurality is enough plurality is a classic "how long is a piece of string?" question, especially in Ireland where small market size has limited the scope for extensive commercially funded media. Consolidation promises cost-savings through synergies, and ownership by transnational parents with potentially deep pockets might well recommend such acquisitions to the Irish state. In theory, online platforms solve issues of pluralism at a stroke by creating space for a more or less infinite diversity of perspectives. However, although platforms do not create the kind of news content considered a *sine qua non* for the operation of the public sphere, they do draw commercial funding away from the media outlets that do perform this function (online media are the single largest destination for Irish advertising expenditure since 2015). Thus the centuries old "advertising for news" *quid pro quo* which sustained commercial media is collapsing. The promised economies of scale and scope offered by the kind of consolidation tracked by the Mediaownership.ie site might be an element of the solution to this challenge. However, as a number of submissions from private media outlets to the Future of Media Commission suggest, a more fundamental reconceptualization (including state funding for private media) of how to fund the operation of the public sphere seems increasingly essential.