

SOUTH KOREA

South Korea's media ecosystem is characterised by strong broadcasters, a newspaper sector struggling to adapt to digital change, and low trust in the news. Powerful Korean-owned portals dominate the distribution of news online but media companies are trying to change that by experimenting with new business models and formats.

News organisations and CEOs, in their New Year speeches, have increasingly been using the phrase 'post-portal' to describe a world where they are less dependent on third-party aggregators such as Naver and Daum. Media companies and academics have been discussing the possibility of setting up an alternative portal that would offer similar levels of convenience but better incentives for quality journalism to thrive.

One key challenge to any such plan is the low level of audience trust in the news media, which is among the lowest in our global survey at just 28%. Detailed Korea Press Foundation (KPF) research, based on a survey of 60,000 people, has also shown that the news media score consistently badly for concepts like trust and fairness, but do a bit better in terms of perceived independence and also the influence that the news media have on society. Respondents gave particularly low marks to the performance of the Korean media in representing the socially underprivileged, monitoring the government and public figures, and keeping an eye on corporate activities.¹¹⁸

Media outlets continue to experiment with paid subscription models – as well as short-form video production – to better respond to changing audience and business trends. After the two major newspapers – *Chosun Ilbo* and *JoongAng Ilbo* – introduced 'login wall' in 2021, *Korea Economic Daily* and broadcaster SBS also jumped on the bandwagon. In October 2022, *JoongAng Ilbo* rolled out a full-fledged paid premium subscription model titled The JoongAng Plus. The 'newspaper of record' is pushing for a dual-track strategy where general news remains distributed through portals free of charge, while premium content is offered only through paid subscriptions.

Other newspapers such as *Maeil Business Newspaper*, *Kyunghyang Shinmun*, and *Hankook Ilbo* are reviewing paid subscription models while closely watching *JoongAng Ilbo*'s move.

Meanwhile, a host of media outlets, especially TV networks with a competitive edge in video content, are investing heavily in short-form video news for TikTok and other social media platforms. Only a small proportion (4%) use TikTok for news, despite the strong attention it draws outside Korea. But short-form video is also being strongly promoted by YouTube, which has grown rapidly in recent years as a news platform. Over half our sample use YouTube (53%) for news each week – up 9 percentage points on last year.

The big TV news networks, YTN, KBS, SBS, MBC, and JTBC, all produce bespoke video for social platforms where reporters explain news items that are likely to attract the attention of the younger generation with a more informal and lighter tone. On other occasions they re-edit television content on topics ranging from accidents and disasters to politics. Newspapers have been slower to invest as they often lack video production and editing skills.

On the evening of 29 October 2022, a number of Halloween partygoers squeezed into a narrow alley in the Itaewon neighbourhood of Seoul, resulting in a deadly crowd crush. In a previous disaster – when the Sewol ferry sank in 2014 and many people were killed – Korean media reported wrongly that 'all passengers have been rescued'. This resulted from the media's practice, at the time, of uncritical reporting of government or company statements without fact-checking.

In the wake of the disaster, media organisations such as the Journalists

Association of Korea drew up a set of guidelines for reporting disasters. In the case of the Halloween accident, research shows that the media were seen to have improved their practices by mostly refraining from intruding excessively on the privacy of victims or showing overly graphic images or videos. However, some local media were criticised for sensational and provocative coverage of the initial stages of the crowd crush. The Korea Press Ethics Commission gave an official warning to some media outlets for repeatedly showing graphic scenes of the crowd crush, including videos of people performing CPR on the victims.

The Itaewon accident has also highlighted the psychological damage that journalists who witness traumatic scenes can suffer in the course of field reporting. Some reporters covering the disaster have complained of health problems since the incident and the Journalists Association of Korea has been offering extra advice and psychological support.

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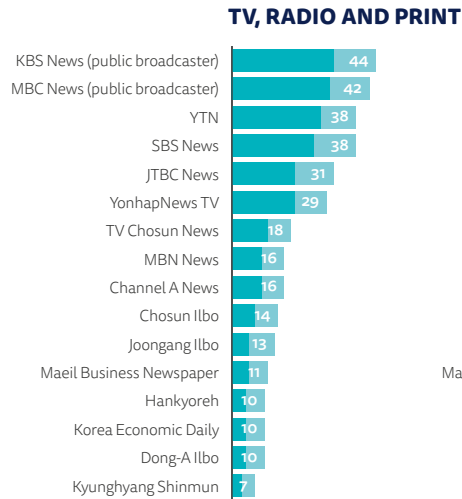
¹¹⁸ Korea Press Foundation, *Media Users in Korea 2022*. <https://www.kpf.or.kr/synap/skin/doc.html?fn=1675144529256.pdf&rs=/synap/result/research>

WEEKLY REACH OFFLINE AND ONLINE

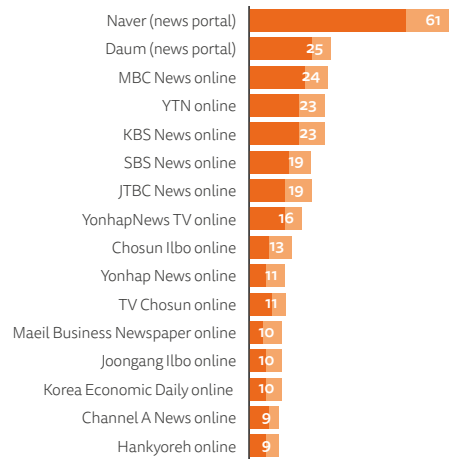
TOP BRANDS

% Weekly usage

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



ONLINE

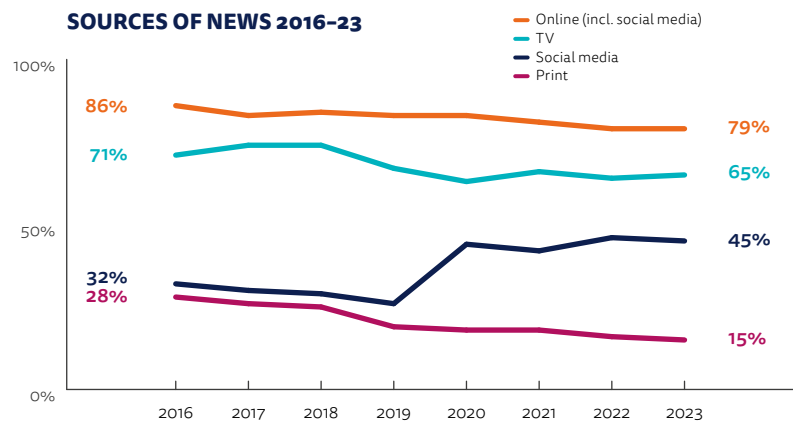


CHANGING MEDIA

News consumption in Korea is mostly reliant on online portals such as Naver and Daum, as well as a competitive broadcast sector, with print media becoming less influential over time. Social video platforms such as YouTube have become much more important for the discovery and consumption of news.

11% pay for **ONLINE NEWS**

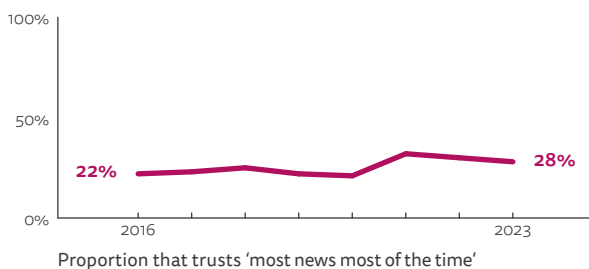
SOURCES OF NEWS 2016-23



TRUST

Koreans' trust in the news has been stuck at a low level, with just 28% of respondents saying that they 'trust most news most of the time'. The most trusted individual news brand was MBC, one of the public broadcasters in South Korea, which showed a significant year-on-year increase. This was followed by other major broadcasters, such as YTN, KBS, SBS, and JTBC. Most major newspapers have lower levels of trust.

OVERALL TRUST SCORE 2016-23



28%
OVERALL TRUST
=41/46 markets

BRAND TRUST SCORES

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

Brand	Trust	Neither	Don't Trust
Channel A News	39%	29%	32%
Chosun Ilbo	33%	26%	40%
Dong-A Ilbo	35%	31%	34%
Hankyoreh	40%	32%	28%
JoongAng Ilbo	36%	32%	32%
JTBC News	52%	29%	19%
KBS News	55%	27%	19%
Kyunghyang Shinmun	37%	37%	25%
MBC News	58%	23%	20%
MBN News	39%	35%	27%
Regional or local newspaper	35%	40%	25%
SBS News	53%	29%	18%
TV Chosun News	36%	25%	39%
YonhapNews TV	48%	31%	21%
YTN	55%	28%	17%

Q6. brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6-10 coded as 'Trust', 5 coded as 'Neither', 0-4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.



WORLD PRESS FREEDOM INDEX SCORE 2023

Score: **70.83**

47 / 180

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

25% **SHARE NEWS**
via social, messaging or email

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	YouTube	53% (+9)	77%
2	Kakao Talk	22% (-2)	69%
3	Instagram	12% (+1)	40%

Rank	Brand	For News	For All
4	Facebook	10% (-4)	27%
5	Twitter	4% (-2)	12%
6	TikTok	4% (+1)	10%

JAPAN

Japan's inflation rate hit the highest level in over four decades, squeezing household budgets. These economic shocks, coming on top of COVID-19 lockdowns, look set to accelerate further changes in the country's media landscape, once characterised by strong daily newspaper and television networks.

Daily newspaper circulation has fallen by around a third in the last decade, from 47.8 million in 2012 to 30.8 million last year.¹⁰⁶ Commercial broadcasters, especially ones that provide local news services, continue to be badly affected by lower advertising revenues, prompting debate about changing their licence remit, to allow them to broadcast over wider areas. Meanwhile, the public broadcaster NHK announced plans to reduce the annual fee its viewers pay by around 10% from October 2023 to ease the impact of the cost of living. The corporation will cut one of its satellite channels in addition to reducing AM radio services, as part of its plans to balance the books.

While making money from digital media remains difficult, some traditional news brands are accelerating their online strategies. The country's leading liberal daily, *Asahi Shimbun*, took a bold step to put all its articles behind a hard paywall for the first time. At the same time, the paper introduced a new service that enables subscribers to share two to five stories as 'gifts' to their friends for 24 hours. *Nikkei*, a pioneer in pushing digital business models, has also been tightening its paywall strategy with non-subscribers allowed to read just one article a month instead of the previous ten. Meanwhile, the conservative daily, *Yomiuri Shinbun*, which still has the largest print circulation in Japan (6.6 million), continues to restrict digital access to print subscribers, in a bid to protect its highly profitable newspaper business. It still does not offer a digital-only subscription.

Digital-born players are gaining ground in the wider media ecosystem. Abema TV, a streaming TV service co-owned by internet entertainment company Cyberagent and commercial broadcaster TV Asahi, live-streamed the World Cup

football in December 2022.¹⁰⁷ It was an unprecedented move by an internet TV service to successfully deliver all 64 games to as many as 23 million viewers for free – a stark contrast to commercial broadcasters who failed to broadcast some games despite having paid expensive broadcasting rights.

Yahoo! Japan and LINE announced a merger, streamlining its operation. Yahoo!'s news provision has a massive readership, and LINE is Japan's dominant messaging app, with its LINE NEWS aggregator widely used by the younger generation. Both already operate under the ownership of Z Holdings, backed by SoftBank conglomerate, but the further integration is aimed at cutting costs, driving better products, and more innovation.¹⁰⁸

The COVID pandemic, the war in Ukraine, and the shooting of former Prime Minister Shinzo Abe have all raised awareness about the dangers of misinformation and disinformation in a fast-paced and more socially driven news environment. In October 2022, a Tokyo-based non-profit organisation launched the Japan Fact-Check Center made up of journalists and academics. Supported by donations from Yahoo! Japan and Google, it plans to publish ten articles a month on the authenticity of information in online spaces. In a further move to improve the quality of online debate, Yahoo! Japan made it mandatory for users to register mobile phone numbers before posting comments on its news stories.

In March 2023, a controversy erupted in the national diet (parliament) over the government's interpretation of political impartiality in broadcasting. The opposition party revealed a leaked document showing how the administration of then Prime Minister Abe put pressure



on the Ministry of Communications to extend the interpretation to cover a single broadcast programme, rather than judging political impartiality over the entirety of the output.

Current Prime Minister Fumio Kishida's closest aide was forced to resign after the *Mainichi Shimbun* newspaper¹⁰⁹ reported a homophobic comment during a background briefing. These briefings are held under the rule that reporters do not name the source, but the paper justified its action by saying it was in the public interest since the comment seriously violated the rights of sexual minorities. *Mainichi* let the aide know in advance that it was naming him, but the decision has raised wider questions about trust of journalism and the circumstances under which journalists should break promises to protect the anonymity of their sources.

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¹⁰⁶ <https://www.pressnet.or.jp/english/data/circulation/circulation01.php>

¹⁰⁷ <https://www.japantimes.co.jp/news/2022/12/06/business/tech/2022-fifa-world-cup-abema-livestream/>

¹⁰⁸ <https://www.japantimes.co.jp/news/2023/02/03/business/corporate-business/z-holdings-yahoo-japan-line-merger/>

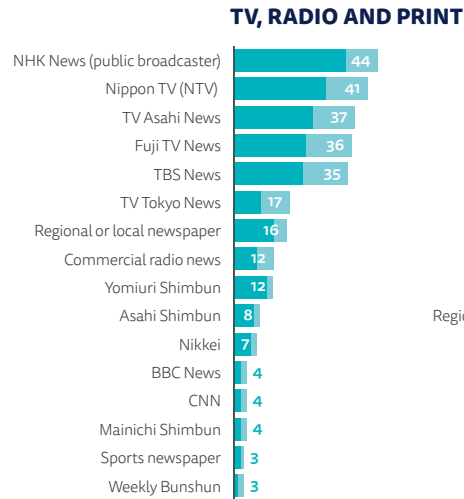
¹⁰⁹ <https://www.japantimes.co.jp/news/2023/02/05/national/politics-diplomacy/masayoshi-arai-japan-same-sex-marriage-hate/>

WEEKLY REACH OFFLINE AND ONLINE

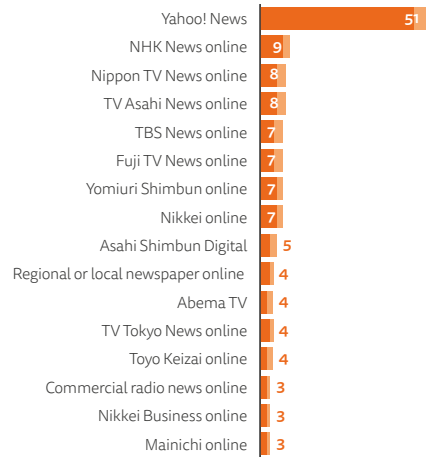
TOP BRANDS

% Weekly usage

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



ONLINE

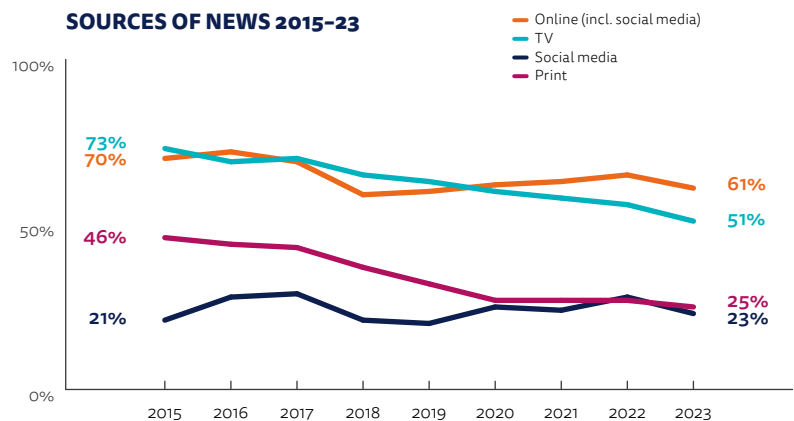


CHANGING MEDIA

In Japan's super-ageing society, where over-65s make up almost a third (29%) of the population, the generational gap in media consumption is widening. Older people still cling to TV and print, but younger groups mainly get news from online aggregators and also from social media.



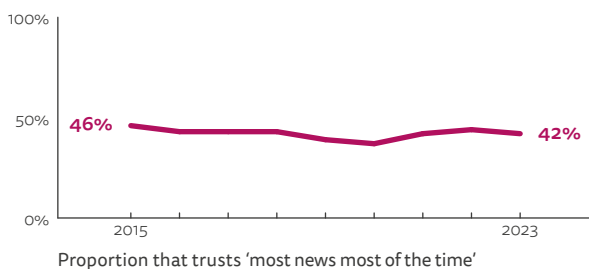
SOURCES OF NEWS 2015-23



TRUST

Trust in the news remains stable after it bounced back from two years of decline between 2019 and 2020. There is no significant difference in the level of trust in news in general versus 'the news I consume', which Japanese academics point to as a unique character of the Japanese market, indicating the consumers' passive behaviour or even apathy towards news.

OVERALL TRUST SCORE 2015-23



42%
OVERALL TRUST
=17/46 markets

BRAND TRUST SCORES

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

Brand	Trust	Neither	Don't Trust
Asahi Shimbun	46%	34%	20%
Fuji TV News	53%	33%	14%
Local newspaper	53%	36%	11%
Mainichi Shimbun	48%	37%	16%
NHK News	61%	27%	12%
Nikkei	55%	35%	11%
Nippon TV News	55%	33%	12%
Sankei Shimbun	48%	39%	14%
TBS News	54%	32%	13%
TV Asahi News	51%	33%	16%
TV Tokyo News	53%	36%	11%
Weekly Bunshun	28%	42%	31%
Weekly Shincho	29%	45%	26%
Yahoo! News	49%	36%	15%
Yomiuri Shimbun	51%	35%	13%

Q6. brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6-10 coded as 'Trust', 5 coded as 'Neither', 0-4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.

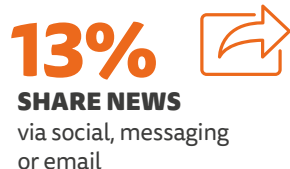


WORLD PRESS FREEDOM INDEX SCORE 2023

Score: **63.95**

68 / 180

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



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	YouTube	26% (+4)	58%
2	Twitter	16% (-2)	32%
3	Line	13% (-3)	38%

Rank	Brand	For News	For All
4	Instagram	4% (-)	23%
5	Facebook	4% (-1)	14%
6	TikTok	3% (+1)	9%

TAIWAN

Tensions with China reached a new pitch in the past year, putting the media on an emergency footing. Taiwan has a lively and combative media but there are differences in opinion on how to tackle misinformation, not only between political parties but also between pro-independence and pro-unification media.

As the war in Ukraine continued, tensions in the Taiwan Strait were heightened with worries that China might follow Russia's lead. Nearly 200 foreign officials visited Taiwan in 2022 to discuss how to contain Chinese ambitions. Following the visits, China stepped up its display of military force, as it pressed its claim to sovereignty over democratically governed Taiwan. Undersea cables linking Taiwan and its outlying Matzu islands near China were severed by Chinese fishing boats. Chinese radio stations also aired messages encouraging Taiwanese to work in China and promoting unification.

Following the October 2022 visit of Nancy Pelosi, then speaker of the US House of Representatives, a large number of cyberattacks were carried out on Taiwanese government websites.¹¹⁹ TV displays in some railway stations were hacked to show messages such as 'The great China will eventually be reunited'. These tactics extended to the media. Formosa TV, a pro-independence news channel, reported a series of cyberattacks. Its websites and YouTube streams were hacked to show pro-Beijing statements including 'China's terrestrial sovereignty cannot be interfered by outsiders'.

In response, the Taiwanese Ministry of Defence proposed to revise a national mobilisation act, saying there was a need to manage false information in time of emergency. According to the proposal, once mobilisation was mandated, all media would have to co-operate with government orders and penalties for spreading misinformation would be increased.

While pro-independence publications such as *Liberty Times* supported the plans, pro-unification media such as *United Daily* warned that the ruling party might abuse the emergency regulations to suppress

press freedom in peacetime.¹²⁰ Opposition parties blocked the proposals as a result.

Efforts at countering misinformation are not limited to the government though. The Taiwan Fact Checking Center, led by journalists, publishes dozens of fact-checks a week on issues ranging from consumer scares to geopolitical propaganda. Other agencies are stepping up efforts to increase media literacy and have invited citizens to take part. Watchout, an independent media organisation, produces handbooks on how to spot disinformation in a crisis. In October 2022, the founder of Taiwan's second-largest chipmaker, Robert Tsao, pledged US\$20m to provide training to citizens in open-source intelligence and cybersecurity.

The public broadcaster, Taiwan Broadcasting System (TBS), whose Public Television Service (PTS) news brand is among the country's most trusted, has put itself on high alert to prevent being hacked and to strengthen its operational resilience. It is also expanding and improving its output, including its subscription video-on-demand service PTS+, hoping to make it the most popular local platform for artistic and cultural performances. It has also launched the country's first English-language TV channel, TaiwanPlus, a venture supported by the Ministry of Culture as part of its mission is to share the country's perspective internationally. The hope is that the new channel, which TBS hopes to make available in the United States, might help to counter the impact of Beijing's English-language China Global Television Network (CGTN).

In a crowded market – there are already 19 24-hour news channels in Taiwan, mostly privately owned – only the Chinese Television System is public. It has made a lot of effort to improve its quality in order

to obtain one of the prime positions on cable TV's electronic programme guides. Commercial operators have suffered from a continuing loss of income, even though Taiwan's economic growth is strong and digital advertising revenue rose by nearly 10% in 2021. Newspaper advertising income fell by more than 30%, which has worried many about the ability of Taiwanese media to resist Chinese influences. A report by Freedom House said some Taiwanese publications were publishing content arranged, sponsored, or paid for by Chinese authorities.¹²¹

Facing declining income, Taiwan's publishers have got together to lobby the government to help them in negotiations with Meta, Google, and others, arguing that platform operators receive around 80% of the digital advertising revenues in Taiwan without appropriately compensating those that produce the content. The platforms say they gain few profits from news but already make contributions to local journalism. In March 2023, Google launched a US\$10m three-year programme to help news providers with digital transformation.

Lihyun Lin

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¹¹⁹ <https://www.reuters.com/technology/website-taiwans-presidential-office-receives-overseas-cyber-attack-source-2022-08-02/>

¹²⁰ *Liberty Times*, 10 Mar. 2023. 'Editorial: Strengthening National Defense'. <https://talk.ltn.com.tw/article/paper/1571167>. *United Daily*, 26 Feb. 2023. 'Editorial, National Mobilization Act: Military Rule'. <https://udn.com/news/story/6656/6996779>

¹²¹ A. Datt, J-N Huang, 2022. *Beijing's Global Media Influence Report*, Taiwan. <https://freedomhouse.org/country/taiwan/beijings-global-media-influence/2022>



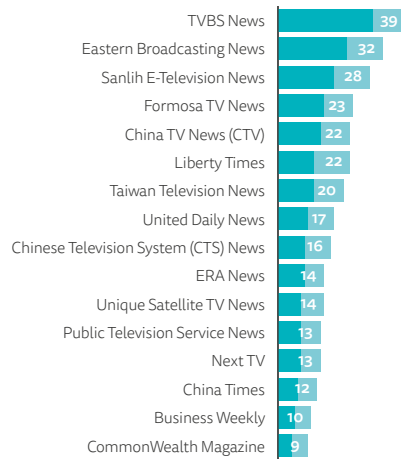
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

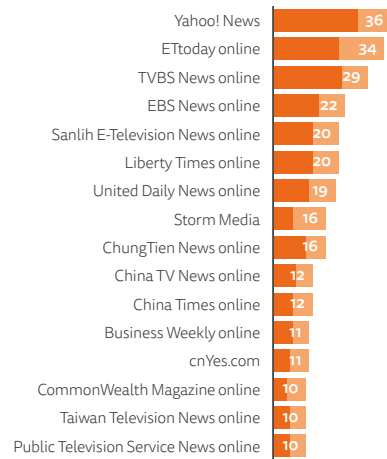
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TV, RADIO AND PRINT



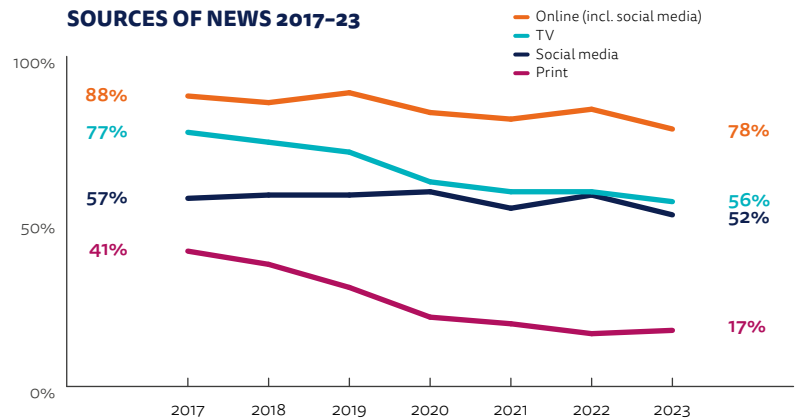
ONLINE



CHANGING MEDIA

Traditional media sources such as television and print have become less important over time while digital news consolidates its position. More and more Taiwanese use YouTube for news – from 38% in 2021 to 44% in 2023 – with most news channel operators now uploading videos there.

SOURCES OF NEWS 2017-23

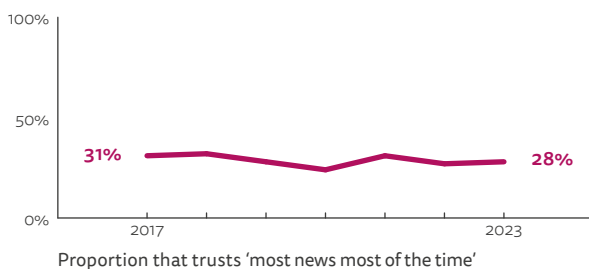


13% pay for **ONLINE NEWS**

TRUST

Due to the intense competition in the media market and the interventions of owners, trust in news (28%) remains among the lowest in our survey. In the polarised media landscape, many brands with political colours are less trusted, whereas business publications tend to have higher levels of trust. PTS (55%) remains one of the most trusted brands this year, after internal improvements.

OVERALL TRUST SCORE 2017-23



28%
OVERALL TRUST
=41/46 markets

BRAND TRUST SCORES

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

Brand	Trust	Neither	Don't Trust
Business Weekly	55%	36%	10%
China TV (CTV) News	45%	39%	16%
Chinese Television System (CTS) News	42%	41%	17%
CommonWealth Magazine	54%	37%	9%
EBC News	46%	40%	14%
Economic Daily	51%	40%	9%
Ettoday.net	46%	39%	14%
Formosa TV News	38%	35%	27%
Liberty Times	38%	36%	26%
Public Television Service (PTS)	55%	35%	11%
Sanli News	35%	35%	30%
Storm Media	34%	42%	23%
TTV News	45%	41%	14%
TVBS News	51%	37%	12%
United Daily	45%	41%	14%

Q6 brand trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Details: 6-10 coded as 'Trust', 5 coded as 'Neither', 0-4 coded as 'Don't trust'. Those that haven't heard of each brand were excluded. Whether respondents consider a brand trustworthy is their subjective judgement, and the scores are aggregates of public opinion, not an objective assessment of underlying trustworthiness.



WORLD PRESS FREEDOM INDEX SCORE 2023

Score: **75.54**

35 / 180

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

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

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Line	47% (-2)	71%
2	YouTube	44% (+4)	71%
3	Facebook	41% (-4)	63%

Rank	Brand	For News	For All
4	Instagram	10% (+1)	31%
5	PTT (bulletin board)	7% (-)	15%
6	Facebook Messenger	6% (-)	27%