UNESCO
United Nations
Educational, Scientific and
Cultural Organization

World Trends in
Freedom of Expression and Media Development

GLOBAL REPORT 2017/2018

EXECUTIVE SUMMARY

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More information and the complete *World Trends Report* can be found at en.unesco.org/world-media-trends-2017

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Sweden
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Foreword

UNESCO is proud to present the third edition of its report on "*World Trends in Freedom of Expression and Media Development*". In this publication I see an embodiment of UNESCO's role as a laboratory of ideas and international understanding. The report portrays a world whose meteoric changes deeply affect societies, especially in the areas of freedom of expression and media development.

Press freedom is examined here in four of its key dimensions: (i) media freedom, (ii) media pluralism, (iii) media independence and (iv) safety of journalists. As in our previous reports, special attention is paid to gender equality. The report is intended as a tool for implementing the United Nations 2030 Agenda for Sustainable Development, which recognizes the importance of ensuring public access to information and protecting fundamental freedoms among its goals.

Hence the importance of this document, which provides tools to examine the global situation of access to information and of freedom of expression as a fundamental freedom. In this context we highlight the interdependent objectives of the protection of freedom of expression and the development of an informed public.

The report covers the period 2012 to 2017. It is based on regional studies and a large amount of data showing the changes that have occurred since our first report. We have thus noted profound transformations in the field of **media freedom**, which is making progress in certain areas, but losing ground in others. Media freedom is limited in particular by many legal restrictions on the right to impart information and ideas, although progress is being made with regard to legal guarantees to seek and receive information.
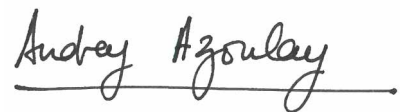
With regard to **media pluralism**, the last five years have seen a considerable increase in the number of sources of information. Yet the concentration of ownership of media companies and Internet services raises major concerns. The filtering effects of social media, which create "bubbles" in which people do not access the truth or "points of view" they consider "irritating" or "inappropriate" is one example. Another is the manipulation and dissemination of false information by propaganda mouthpieces. There has also been a hiatus in the progress of gender equality in content and staffing.

Trends show that **media independence** is weakening and the professional standards of journalism are being eroded by economic forces on the one hand and lack of recognition by political actors on the other. Media and Internet companies are increasingly aware of the need for self-regulation.

Finally, with regard to the **physical, psychological and digital safety of journalists**, trends remain extremely alarming, although implementation of the United Nations Plan of Action on the Safety of Journalists and the Issue of Impunity offers hope. There is new momentum for mechanisms to monitor, prevent, protect and strengthen justice for crimes against journalists. This momentum must be encouraged.

I acknowledge all our partners involved in the preparation of this report, including academics, media professionals, Sweden for its funding and Norway for its support.

I strongly encourage Member States to use this report, to disseminate its lessons through translations and dedicated events, and to take ownership of its results in order to strengthen national frameworks conducive to freedom of expression, freedom of information and media independence. Everyone will find in this report a valuable guide to progress in this direction.

Audrey Azoulay
Director-General of UNESCO

Executive Summary

This edition of the *World Trends in Freedom of Expression and Media Development Report* addresses a key task put forth by UNESCO's 36th General Conference, for the Organization to monitor and report on contemporary developments in press freedom and the safety of journalists. It picks up where the first *World Trends Report*, published in 2014, concluded, to map key transformations in freedom of expression and media development globally between 2012 and 2017, a period marked by profound social, political and technological shifts.

Adhering to the framework set out by the 1991 Windhoek Declaration, which was also drawn on for previous *World Trends Reports* and emphasizes the key pillars of media freedom, pluralism, independence, and safety to realize press freedom, this study adapts to changing contexts by recognizing the changing roles that political actors, internet companies and audiences are playing in shaping information environments nationally, regionally and globally. It examines transformations in journalism and changes for different types of users and producers of information facilitated by new information and communications technologies, while at the same time demonstrating the continued relevance of the vision of press freedom put forward in the Windhoek Declaration.

The key trends in media freedom, media pluralism, media independence and the safety of journalists that emerged through this analysis are summarized here at the global and regional level.[1] Throughout the analysis of all four pillars, special consideration was given to digital media and gender equality dimensions.[2]

The full *World Trends in Freedom of Expression and Media Development: 2017/2018 Global Report* can be found online at en.unesco.org/world-media-trends-2017

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[1] As this publication was prepared for a report to UNESCO's General Conference, the analysis was conducted according to the six regions that make up the voting groups within UNESCO.

[2] Scholars at the University of Oxford (UK), University of Witwatersrand (South Africa) and University of Pennsylvania (USA) led the research for this study, together with a global network of regional researchers and research assistants, and under the direction of UNESCO's Division of Freedom of Expression and Media Development. An editorial advisory board of 20 international media experts, selected for their regional and thematic expertise, provided input and peer review.

Trends in
Media freedom

CONTINUED LEGAL RESTRICTIONS, including **defamation, insult, blasphemy** and **lèse-majesté laws**

56 2016

18 2015
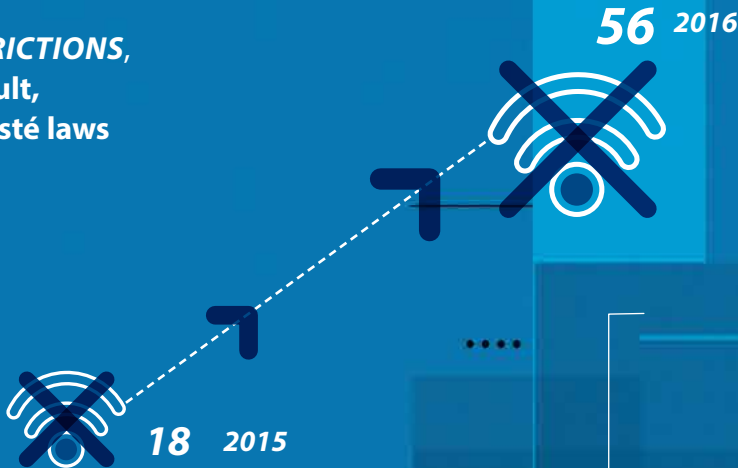
Number of internet shutdowns*

INCREASE IN BLOCKING, filtering and **shutdowns**

DIGITAL MEDIA have raised new challenges for **privacy** and **journalist source protection**

NATIONAL SECURITY CONCERNS, states of emergency and anti-terrorism laws **have curtailed freedom of expression**

Countries with freedom of information laws**

90	91	97	101	104	112
2011	2012	2013	2014	2015	2016
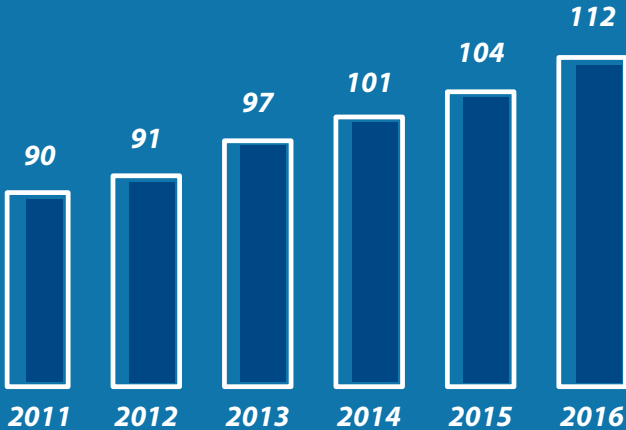
INCREASED RECOGNITION of the public's **right to access information**

R.O.A.M

UNESCO MEMBER STATES HAVE GIVEN SUPPORT FOR INTERNET UNIVERSALITY, for an internet that is **R**ights-based, **O**pen, **A**ccessible and **M**ulti-Stakeholder **(R.O.A.M principles)**

IMPARTING INFO: CURBED

RECEIVING INFO: ENHANCED

Sources: *AccessNow. 2017; **freedominfo.org. 2016

Trends in
Media Freedom

Rapid political, technological and economic transformations during the period of this study have placed new strains on media freedom. The rise of new forms of political populism as well as what have been seen as authoritarian policies are important developments. Citing a range of reasons, including national security, governments are increasingly monitoring and also requiring the take down of information online, in many cases not only relating to hate speech and content seen to encourage violent extremism, but also what has been seen as legitimate political positioning. The growing centrality of the internet in communications, and the accompanying role and influence of powerful internet platforms operating across borders, have drawn the attention of courts and governments seeking to regulate these intermediaries, with risks to online expression.

While there has been much discussion of how new media expand freedoms and communications by actors beyond the media, there are also increasing incursions into privacy and an expansion of mass and arbitrary surveillance. These are seen to raise threats to journalistic source protection and to public confidence in privacy, which the UN has recognized is an enabler of freedom of expression. Furthermore, there has been significant increase in blocking and filtering of online content and a rising trend of large-scale shutdowns of entire social media websites, mobile networks or national internet access. The UN Human Rights Council (in A/HRC/32/L.20) 'unequivocally condemned' such practices, as representing disproportionate restrictions of freedom of expression and the right to access information, and which have significant social, political and economic impacts.

In all this, the traditional limited legal liability for internet companies for content generated by their users, and which has generally been a positive factor for the free flow of information, is coming under strain. While still distinct from media companies that do produce most of their content, internet companies' gatekeeping roles are coming under the spotlight. Questions of their standards related to privacy and to freedom of expression and their transparency policies, not least with algorithmic processing, are being put on the agenda by many actors and for various reasons. In some cases, the companies are criticized for how they are seen sometimes to limit journalistic content, and how, because of their logic of 'attention economics,' they may relegate such content to a level of prominence that presents it as equivalent to other information that does not meet professional standards of verifiability. In other cases, the companies are perceived as opportune targets for what may be seen as politically driven rhetoric that simplistically blames them—and the internet—for particular social ills, and calls for a more active role in terms of limiting content. The proportionality and necessity of such limits, and risks to legitimate expression, are sidelined.

Recent Gallup polls of residents in 131 countries across all regions have suggested that there is a general perception of declining media freedoms across many countries. At the same time, however, media freedom remains recognized and valued by people around the world. Another positive development is that the right to access information gained increased recognition through inclusion of Target 16.10 to 'ensure public access to information and protect fundamental freedoms, in accordance with national legislation and international agreements' in the Sustainable Development Goals. The 2015 UNESCO General Conference proclaimed 28 September as the International Day for Universal Access to Information (38 C/70). The number of Member States with freedom of information laws has risen to 112, with especially strong growth in the Africa and Asia-Pacific regions. At the same time, there is also much to be done globally to improve awareness of such laws and their implementation. Accessibility (covering affordability, linguistic diversity, gender-sensitivity, and media and information literacy) has also been recognized as a foundational component of 'Internet Universality', a UNESCO concept endorsed in 2015 that promotes an internet that is human Rights-based, Open, Accessible and Multi-stakeholder (known as the 'ROAM' principles). In 2017, UNESCO embarked on a wide consultation to develop indicators for assessing these principles at the national level.

Trends in
Media pluralism

Percentage of individuals with access to the internet*

34% 2012

48% 2017

NEARLY HALF THE WORLD'S POPULATION now has access to the internet

THE AVAILABILITY OF MEDIA CONTENT has dramatically increased, largely through sharing and user-generated content on social media

RATING

THE PRACTICE OF 'ZERO-RATING' has increased pluralism in terms of access, but it has raised concerns about limiting net neutrality

*NEWSPAPER CIRCULATION**** **has fallen in all regions,** except in Asia and the Pacific
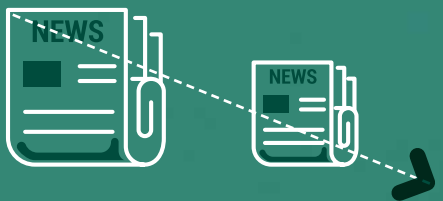
*WOMEN REMAIN UNDERREPRESENTED IN MEDIA**,** making up only:

1 IN 4 MEDIA DECISION-MAKERS

1 IN 3 REPORTERS

1 IN 5 EXPERTS INTERVIEWED

ALGORITHM-RANKED search results and social media news feeds have contributed to the creation of **'echo chambers' and 'filter bubbles',** where people reinforce their beliefs rather than dialogue across differences

EXPANDED ACCESS

NARROWED CHOICE

Trends in **Media Pluralism**

Access to a plurality of media platforms has continued to expand in the period covered by this study. Nearly half the world's population now has access to the internet, in part due to rapidly rising mobile internet connectivity in Africa, Asia and the Pacific, and Latin America and the Caribbean. Satellite television and the digital switchover have multiplied the range of channels to which individuals have access. The availability of media content has also dramatically increased since 2012, largely through sharing and user-generated content. In January 2017, Wikipedia counted nearly twice as many articles as in January 2012, a trend accompanied by a progressive diversification of content and an increase in contributions in languages other than English.

These trends, however, have been accompanied by the rise of a new form of what some have called 'polarized pluralism': multiple kinds of information and programming are available, but each segmented group largely accesses only a limited piece.

In regions where internet penetration and the reliance on online sources for news is the highest, algorithms are used to sort through increasingly abundant information, ranking search results and social media newsfeeds. These have contributed to the creation of what have been called 'echo chambers' and 'filter bubbles' that are seen to reinforce individuals' existing views and produce increasingly siloed debates—although this development may not be necessarily as strong as it is sometimes presented. However, in electoral contests, the rapid proliferation of so-called 'fake news', fuelled in part by the tendency of social media platforms to privilege 'click-worthy' information, has become a powerful illustration for many of the disruptive effects this phenomenon can have on public debates. In other regions, such as in the Arab States and Africa, broadcasting has represented a more central element of this trend towards polarization in and through media.

Similarly, mobile internet uptake and the practice of 'zero-rating'—in which internet or mobile service providers allow users to access specific content or applications without counting towards the user's data 'cap' – have significantly expanded pluralism in terms of access to the internet, especially among the poorest. However, the type of access is often limited to specific mobile apps, introducing concerns that these services may possibly create private 'walled gardens' at odds with the principles of openness and net neutrality.

Pluralism continues to be limited by the ongoing fact that women remain heavily underrepresented in the media workforce, in decision-making roles, and in media content, both as sources and subjects. In response to the continuing marginalization of women, a range of civil society organizations, media outlets and individuals have developed initiatives to change the picture, including through the UNESCO-initiated Global Alliance for Media and Gender and by applying the Gender-Sensitive Indicators for Media.[3]

Traditional business models for the news media have continued to be disrupted, leading to increased vertical and horizontal concentration and the introduction of new types of cross-ownership. Cuts in staffing have affected content diversity, especially in international coverage. Newspaper circulation has fallen in all regions, except in Asia and the Pacific, where there have been large increases in some emerging economies. Independent public service broadcasting is still absent or is under renewed political or financial threat in several regions. The rapid growth of digital advertising, in which revenues nearly doubled between 2012 and 2016, has primarily benefitted large internet platforms rather than traditional media. Faced with these disruptions, traditional news media have experimented with new economic models, including introducing pay-walls, requesting reader donations and seeking crowdfunding. Journalists have also used new technologies, such as virtual reality, to create immersive experiences of distant events.

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[3] The Global Alliance for Media and Gender is a global movement to promote gender equality in and through media, launched by UNESCO and partners at the Global Forum on Media and Gender in December 2013. The Gender-Sensitive Indicators for Media form a framework of indicators to gauge gender equality and women's empowerment in and through media.

Trends in
Media independence

RISE IN RHETORIC AGAINST THE MEDIA by political figures is encouraging self-censorship and undermining media's credibility

INCREASED DEPENDENCE ON government and corporate subsidies is linked to disruptions in business models

NEWS

TRUST IN NEWS MEDIA is seen to have **declined in some regions**

OFF
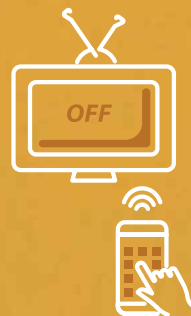
BROADCAST LICENSING continues to be driven by **political and commercial interests**
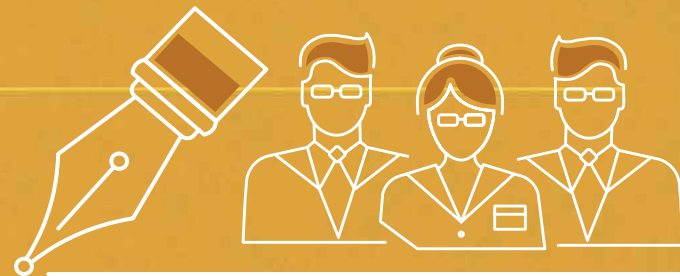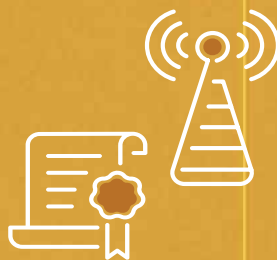
SELF-REGULATORY BODIES, which can support the exercise of professional standards while maintaining editorial independence, **have grown in post-conflict and developing countries**

REPORT

INCREASED SELF-REGULATORY EFFORTS BY INTERNET INTERMEDIARIES are promoting **media and information literacy,** counteracting 'fake news' and tackling online abuse

VULNERABILITY/CAPTURE

RESILIENCE/RESISTANCE

Trends in
Media Independence

The polarization of public life, observed in parts of all regions covered by this study, highlights the need for independent and professional journalism that is able to provide verifiable information as a common content currency to serve effective and open public debates. Yet, in continuity with the trends highlighted in the first *World Trends Report*, published in 2014, media independence is under increased pressure, due to complex interconnections between political power and regulatory authorities, attempts to influence or delegitimize media and journalists, and shrinking budgets in news organizations.

This deterioration of media independence is reflected in a number of indicators.

There is declining public trust in news media reported across most regions. Disruptions in business models have been seen as contributing to increasing dependence on government and corporate subsidies in some circumstances, and thereby raising concerns about potential impacts on editorial independence. In some cases, there has been an increase in highly antagonistic criticism, including from leaders, about media and the practice of journalism. These criticisms are seen to carry the danger of promoting intolerance of expression, and undermining the credibility of all journalism, irrespective of its authenticity.

Across all regions, the autonomy of independent regulators has faced pressure. Across large parts of Africa, Asia and the Pacific, and Latin America and the Caribbean, licensing of broadcast operators lacks transparency and continues to be driven by political and commercial rather than public interest. Self-regulatory bodies, which can support the exercise of professional standards while maintaining editorial independence, have received increased interest in countries with growing media sectors. However, in addition to the difficulty of establishing and maintaining independence in a sustainable way, press councils have faced digital-era challenges, such as the moderation of user-generated comments.

At the same time, there are positive developments for the independence of journalists to make editorial decisions. In Africa, the Arab States and the Asia Pacific region, journalists have self-reported substantial increases of journalistic autonomy. Such changes have also encouraged alternative and often influential outlets for journalists, including on digital media, as well as international investigative journalism collaborations. With continuing growth of information abundance online, the distinctive value of independent journalism is being underlined.

Journalism education, which reinforces independent professional standards in the media, has seen a notable growth in the availability of online resources. However, donor support for independent NGOs doing media development has fluctuated, posing significant sustainability challenges, particularly in parts of Africa and Central and Eastern Europe. These groups are also impacted by growing legislation that restricts foreign funding.

In the context of increasing pressure to respond to content on social media that incites violence or hatred, internet companies have launched self-regulatory initiatives to counter hate speech, violent extremism, misogyny, racism and so-called 'fake news'. Tools have included media and information literacy campaigns; partnerships with fact-checking and research organizations; support to journalists; and removing advertising from sites that generate such content. In the face of fabricated and counterfeit news reports, many news media brands are using the opportunity to show their unique value-add as reliable sources of information and commentary.

Trends in the
Safety of journalists

530
JOURNALISTS WERE KILLED,
Between 2012 and 2016

MAP OF JOURNALISTS KILLED BY REGION, 2012 - 2016

- Western Europe and North America
- Central and Eastern Europe
- Africa
- Asia and the Pacific
- Latin America and the Caribbean
- Arab States

17

17

107

191

73

125

IMPUNITY FOR CRIMES AGAINST JOURNALISTS

9 in 10
CASES REMAIN UNPUNISHED

GROWING THREATS TO DIGITAL SAFETY include cyberattacks, surveillance, hacking, intimidation and rise in online harassment, especially of women journalists

100%
80%
60%
40%
20%
0%

30%

27%

47%

68%

74%

2013   2014   2015   2016   2017
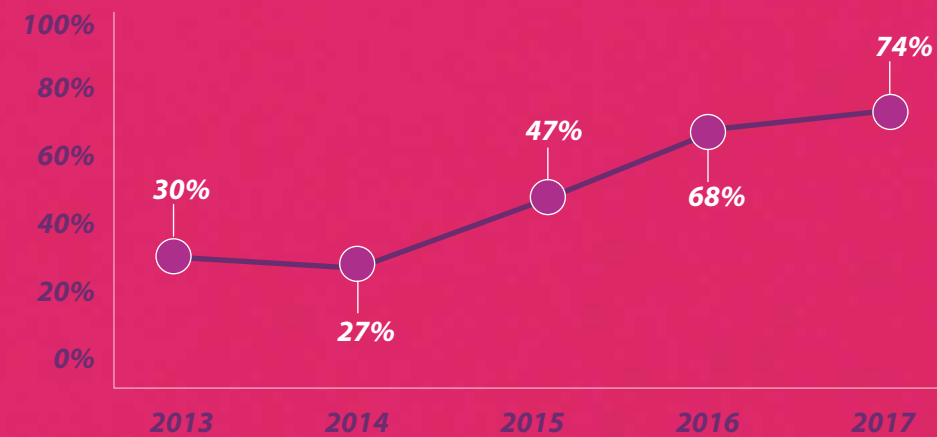
MEMBER STATES HAVE BECOME MORE RESPONSIVE to UNESCO's requests on the safety of journalists, 2013-2017

UN PLAN OF ACTION on the safety of journalists and the issue of impunity

WIDENING ATTACKS

INCREASING RESPONSES

Trends in **Safety of Journalists**

Between 2012 and 2016, 530 journalists were killed, an average of two deaths per week. Due to continued conflict and instability, killings in parts of the Arab region remain very high. After a peak in 2012, the African region witnessed a significant decline in killings of journalists. Killings of women journalists increased during the period, from five women journalists killed in 2012 to 10 in 2016.

Although the killings of foreign correspondents tend to garner global publicity, 92 per cent of journalists killed during this period were local reporters.

Impunity for crimes against journalists remains the norm, with justice in only one in 10 cases. However, Member States have shown increased responsiveness to the Director-General's request for information on the status of judicial inquiries into killings of journalists, with more than 70 per cent responding—in varying degrees of detail—in 2017.

In 2013, the UN General Assembly declared 2 November as the International Day to End Impunity for Crimes against Journalists, which is increasingly observed across the world.

Journalists killed by type of media, 2012-2016

Total
530

Media	Count
TV	166
Print	142
Radio	118
Online	75
Cross-platform	29
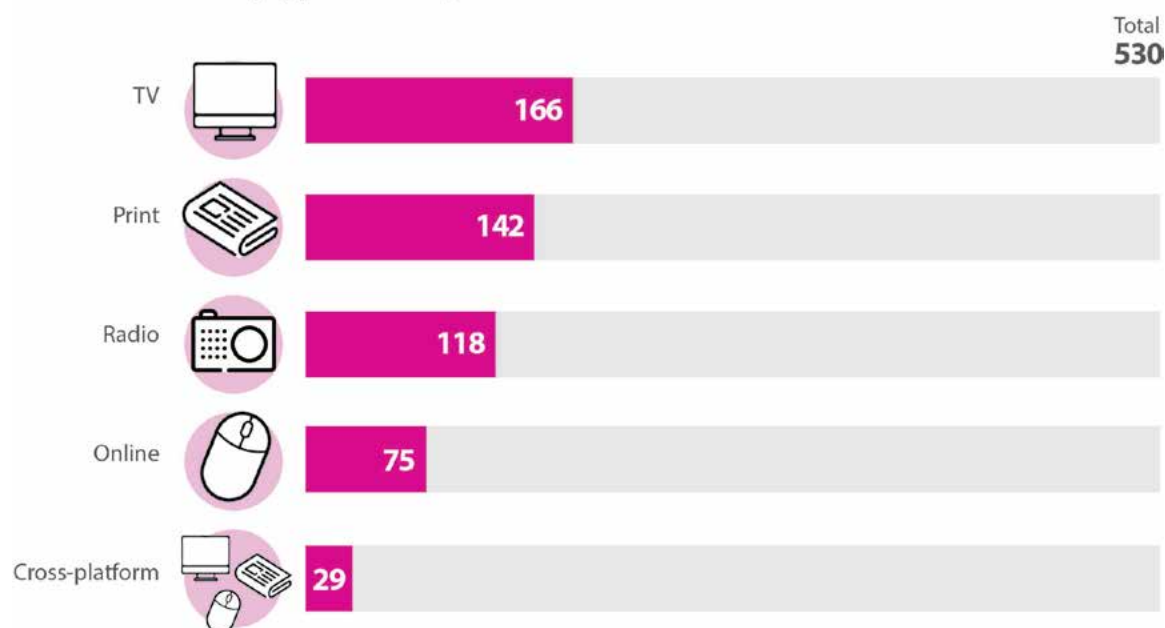
Continuing on earlier trends, there has also been a substantial rise in other forms of violence against journalists, including in kidnapping, enforced disappearance, arbitrary detention and torture. The Arab region has seen a sharp rise in journalists taken hostage by violent extremist groups. Digital safety is an increasing concern for journalists across all regions, with threats posed by intimidation and harassment, disinformation and smear campaigns, website defacement and technical attacks, as well as arbitrary surveillance. Women journalists, in particular, have experienced increasing online abuse, stalking and harassment.

Despite the difficult circumstances under which many journalists work, significant steps have been taken to raise awareness of, and counter violence against, journalists through the UN Plan of Action on the Safety of Journalists and the Issue of Impunity. Since 2012, the UN General Assembly, UN Human Rights Council, UN Security Council and UNESCO have adopted 12 resolutions or decisions related to the safety of journalists. A multi-stakeholder consultation to review implementation of the UN Plan of Action took place in June 2017 in Geneva, Switzerland, leading to 30 forward-looking options for action to be considered by the UN, Member States, regional intergovernmental organizations, civil society, media actors, internet intermediaries and academia.

Continued monitoring on the situation of journalists' safety is needed in order to craft effective and informed strategies. This is all the more necessary to advance the 2030 Agenda for Sustainable Development, building on the contributions of information and knowledge from free, pluralistic and independent media, and drawing on the enhanced safety for journalists to generate the news all societies need.

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Across the world, journalism is under fire. While more individuals have access to content than ever before, the combination of political polarization and technological change has facilitated the rapid spread of hate speech, misogyny and unverified 'fake news', often leading to disproportionate restrictions on freedom of expression. In an ever-growing number of countries, journalists face physical and verbal attacks that threaten their ability to report news and information to the public.

In the face of such challenges, this new volume in the *World Trends in Freedom of Expression and Media Development* series offers a critical analysis of new developments in media freedom, pluralism, independence and the safety of journalists. With a special focus on gender equality in the media, this study provides a global perspective that serves as an essential resource for UNESCO Member States, international organizations, civil society groups, academia and individuals seeking to understand the changing global media landscape.

en.unesco.org/world-media-trends-2017

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