

MASTER'S IN EUROPEAN AND INTERNATIONAL LAW
International Studies Programme (ISP Dialogues)

Regulatory challenges

Helena Sousa

ERC- Entidade Reguladora para a Comunicação Social/
Portuguese Media Regulator

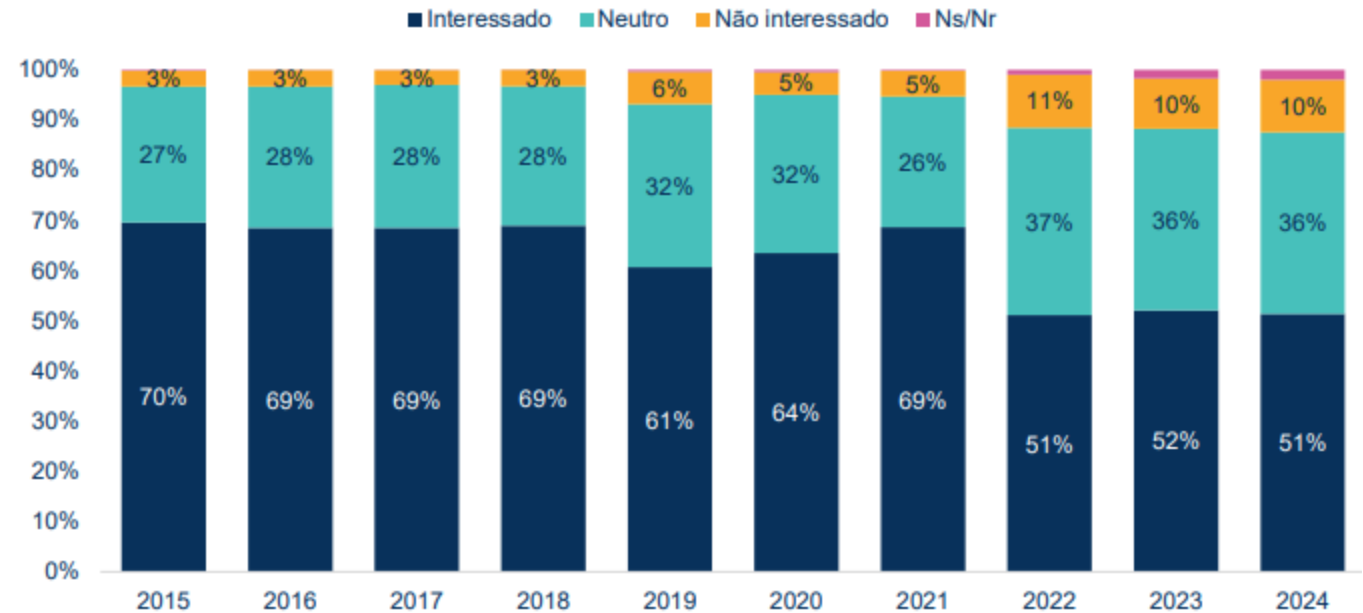
Changes in consumer behaviour

News media

General interest in news

Change over time, 2015-2024

Portugal



Source: Cardoso, G.; Paisana, M.; Pinto-Martinho, A. (2024). Digital News Report Portugal 2024. Obercom

Interest in news is declining:

Rising news avoidance

Changes in consumer behaviour

News media

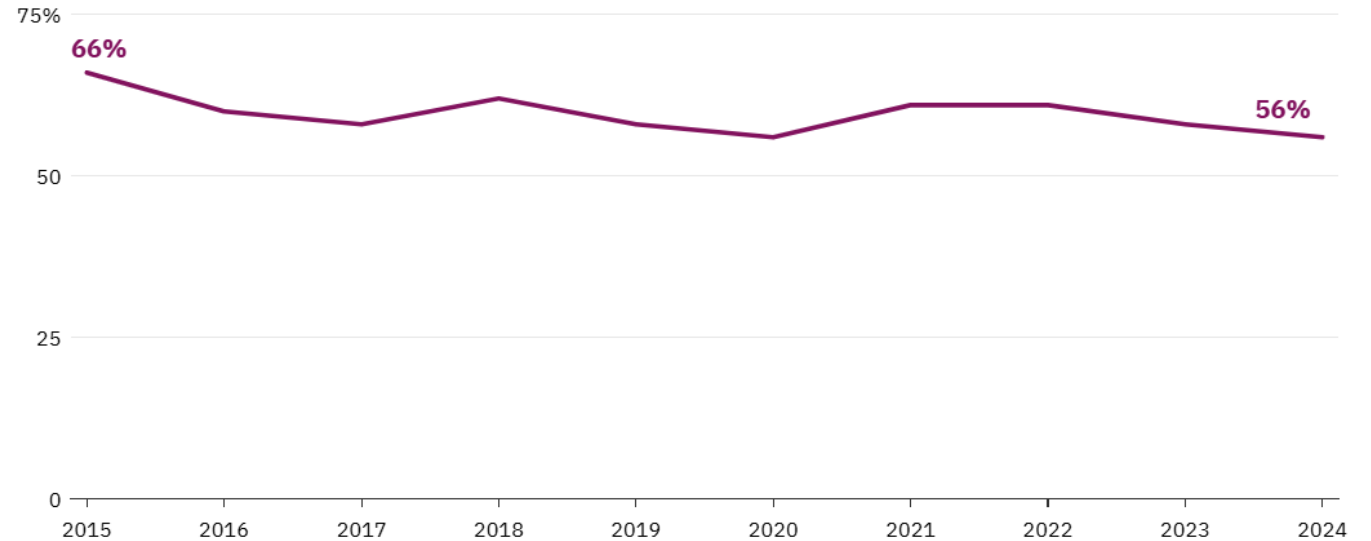
Trust in news is still high but...

- Less 10 pp in a decade
- For the first time, Portugal fell from second or third place to sixth place (out of 47 global markets)

Overall trust score

Change over time 2015–2024

Portugal



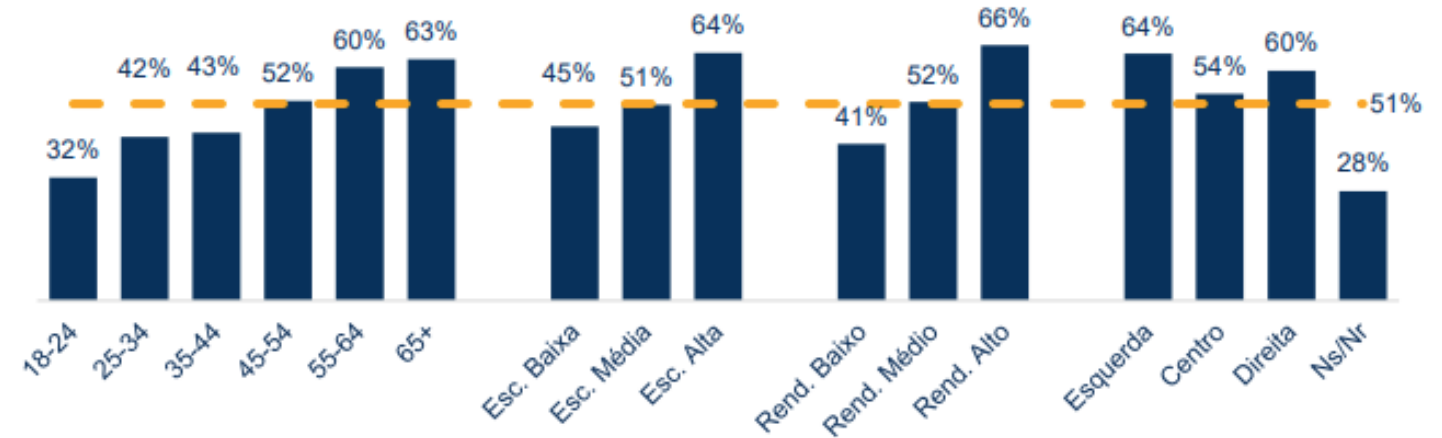
Source: Newman, N., Fletcher, R., Robertson, C.T., Ross Arguedas, A., & Nielsen, R. K. (2024). Reuters Institute, Digital News Report 2024

Changes in consumer behaviour

News media

General interest in news – sociodemographic profile

Change over time, 2015-2024
Portugal



Source: Cardoso, G.; Paisana, M.; Pinto-Martinho, A. (2024). Digital News Report Portugal 2024. Obercom

Younger people

People with lower levels of formal education

People with low income

tend to show less interest in the news

*“These are groups that are often less well served by the news media,
and generally less likely to think that the media cover people like them fairly.” – Reuters Digital News Report 2024*

Changes in consumer behaviour

News media

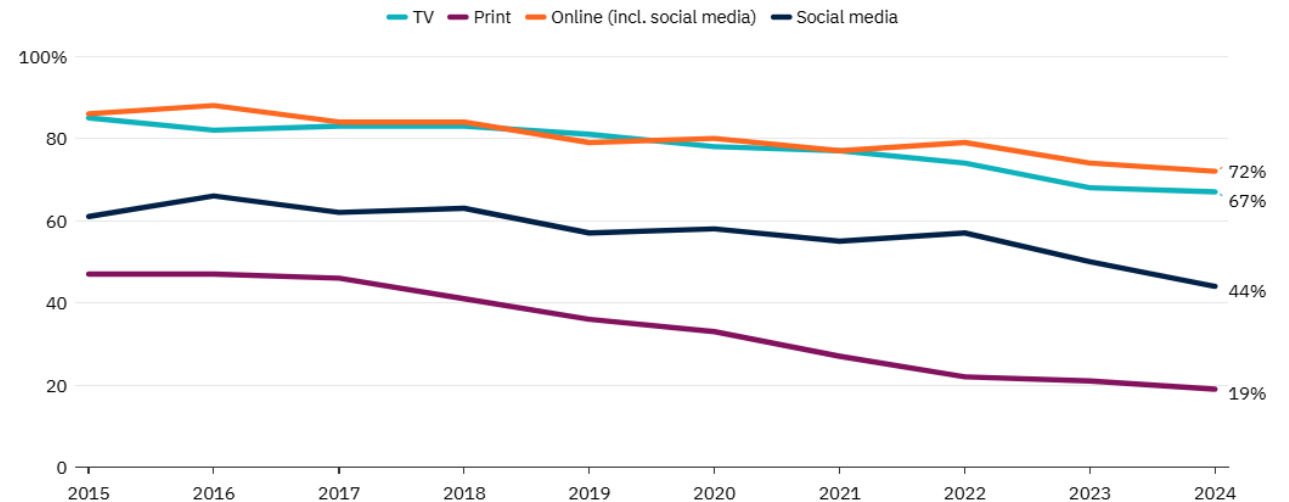
Sources of news (all media)

- Television and Internet are the main sources of news
- Print media are declining, more so after Covid-19
- General decline in news consumption, across all media

Sources of news

2015–2024

Portugal



Source: Newman, N., Fletcher, R., Robertson, C.T., Ross Arguedas, A., & Nielsen, R. K. (2024). Reuters Institute, Digital News Report 2024

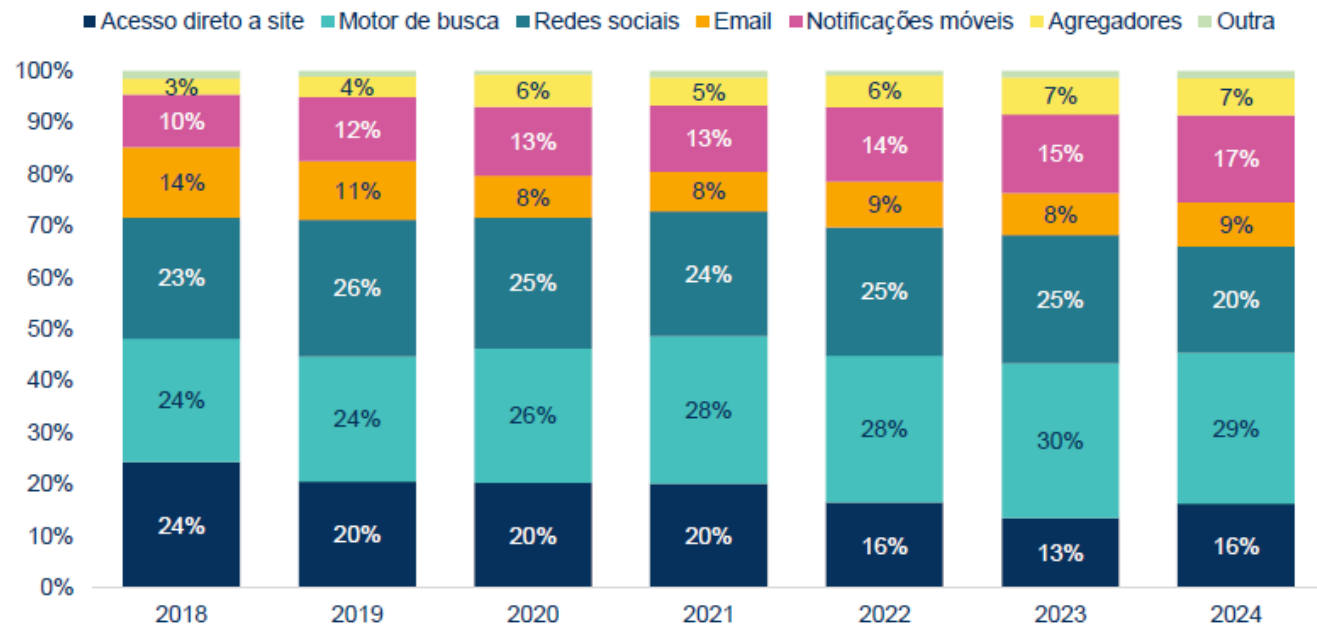
Changes in consumer behaviour

News media

- Access to news media websites is a small part and shrinking (24% in 2018 to 16% in 2024)
- 94% of news are accessed in other sites
- Economic consequences to the media business model, based on advertising and subscriptions

Online sources of news

Change over time, 2018-2024
Portugal



Source: Cardoso, G.; Paisana, M.; Pinto-Martinho, A. (2024). Digital News Report Portugal 2024. Obercom

Changes in consumer behaviour

News media

David vs Goliath:

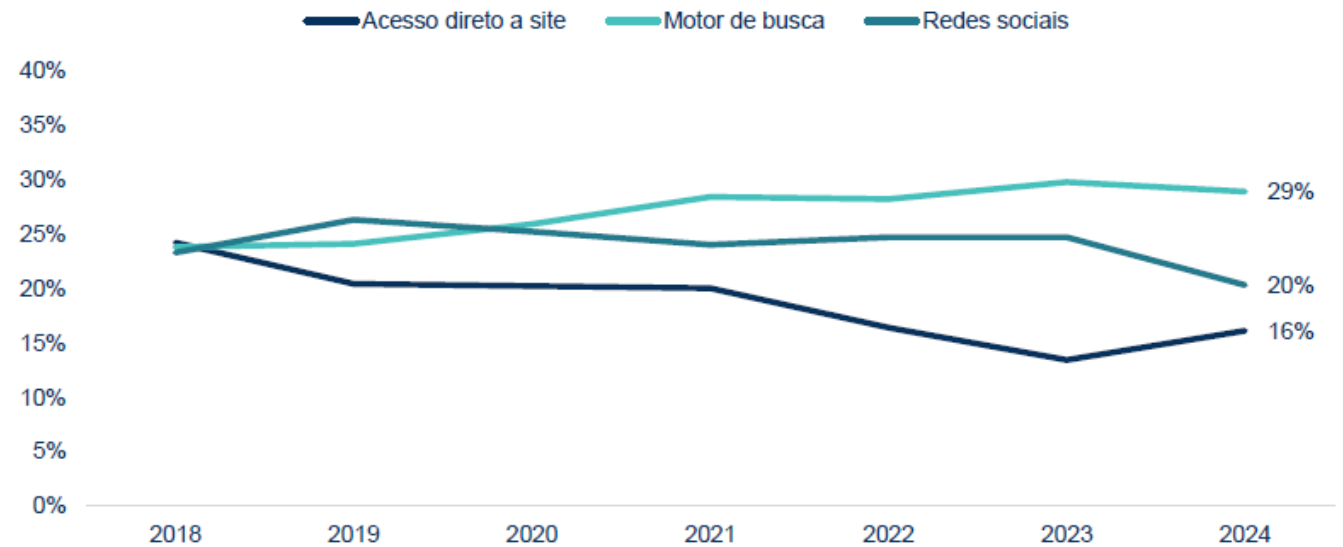
Traditional media competing with global giants

Search engines: incl. Google, Bing, Yahoo

Social media: incl. Facebook, X, Whatsapp

Three main online sources of news

Change over time, 2018-2024
Portugal



Source: Cardoso, G.; Paisana, M.; Pinto-Martinho, A. (2024). Digital News Report Portugal 2024. Obercom

Changes in consumer behaviour

Social media

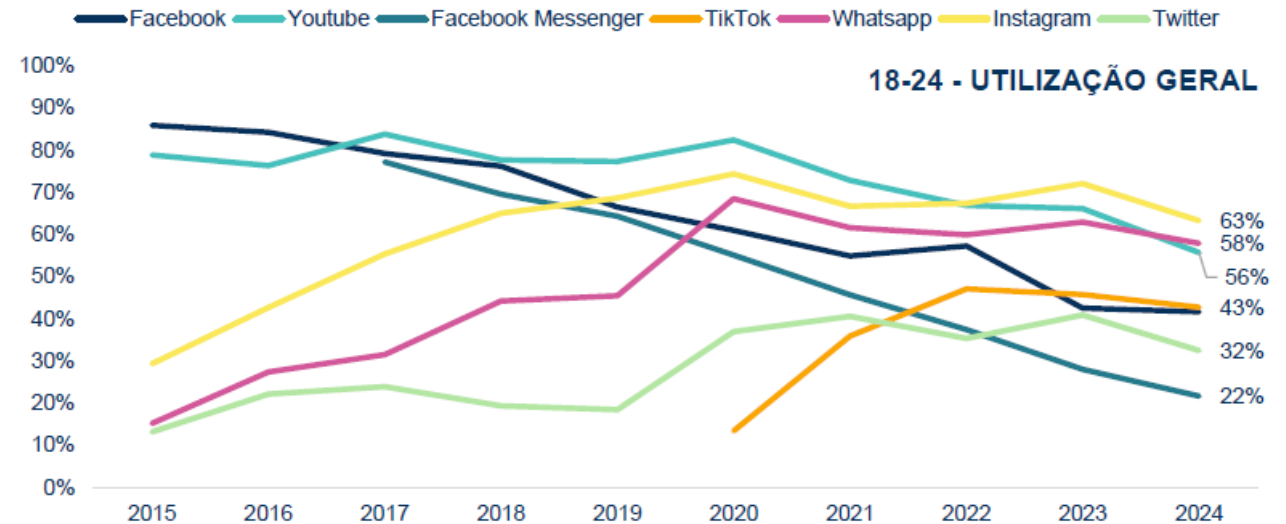
- Stabilisation/slight decrease in social media use (including among young people):
- Growing fragmentation in consumption, increased awareness of the impact on mental health, etc.
- On the technology adoption curve, social media has already reached consolidation
- Accelerated dynamism: possibility of other models emerging (Artificial intelligence)

The EU is now facing the implementation of legal tools to regulate (established) realities

Social media use (all purposes)

Change over time, 2015-2024

Portugal



Source: Cardoso, G.; Paisana, M.; Pinto-Martinho, A. (2024). Digital News Report Portugal 2024. Obercom

Changes in consumer behaviour

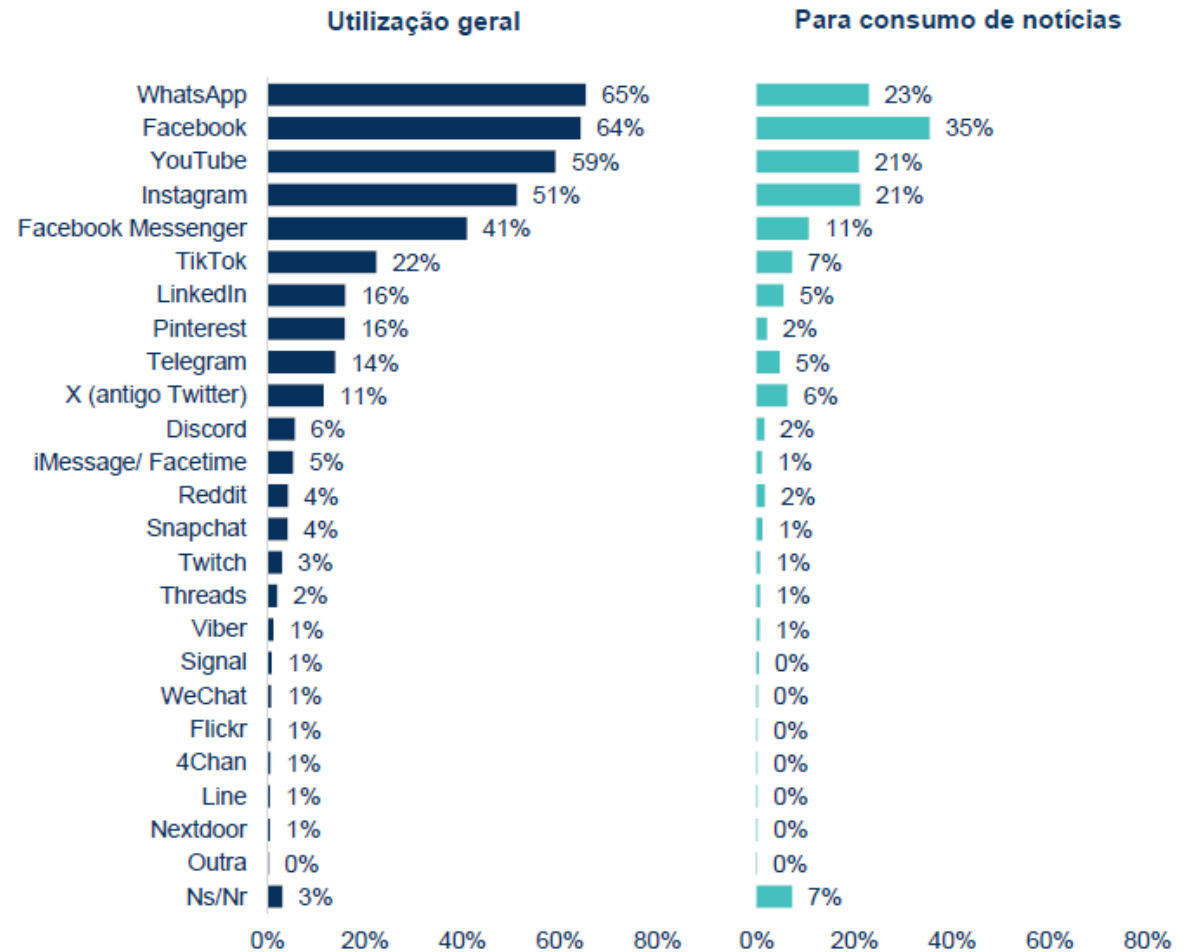
Social media

In 2024, WhatsApp became the most widely used social network in Portugal and the second most widely used for accessing news

- These platforms are more focused on entertainment than on information
- Attention economy: overload of content offered
- Elimination of mediators and greater risk of malicious use: dissemination of disinformation

Social media use (all purposes and access to news)

2024 Portugal

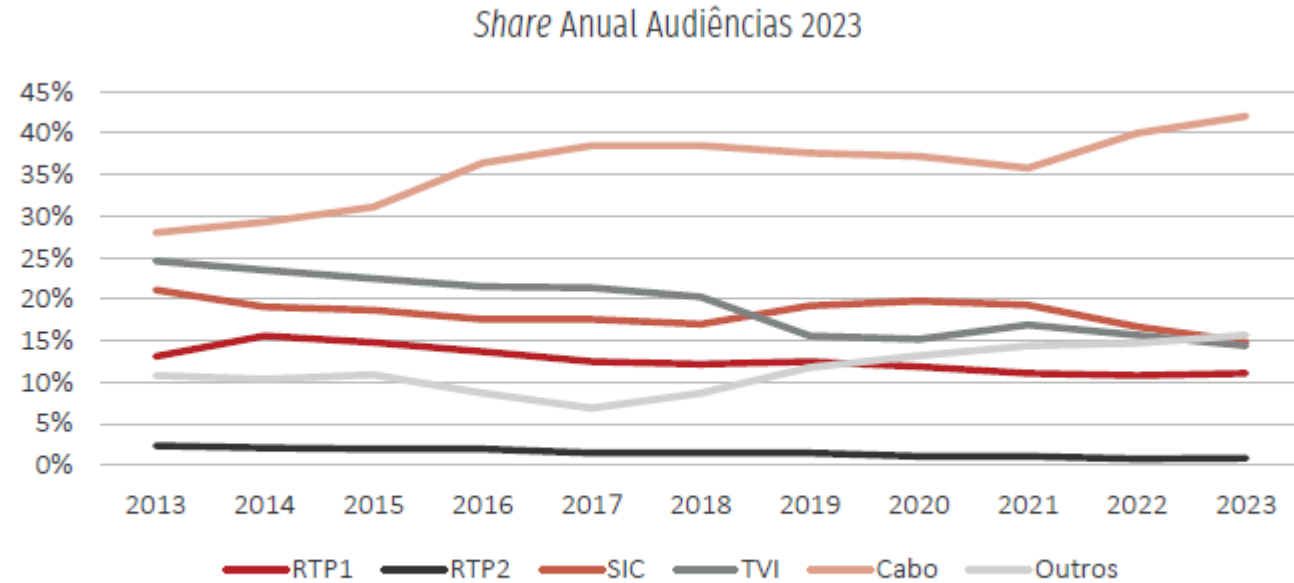


Changes in consumer behaviour

Television

Downward trend across all national
free-to-air channels

Increase in cable (including national
and foreign channels)



Fonte: Universal McCann. Análise Universal McCann/Mediabrands Insight sobre dados CAEM/GfK reproduzidos em YUMI -Telereport; Marktest, "Media and Advertising Global Report 2021, 2022, 2023 (Yumi)".Elaboração ERC.

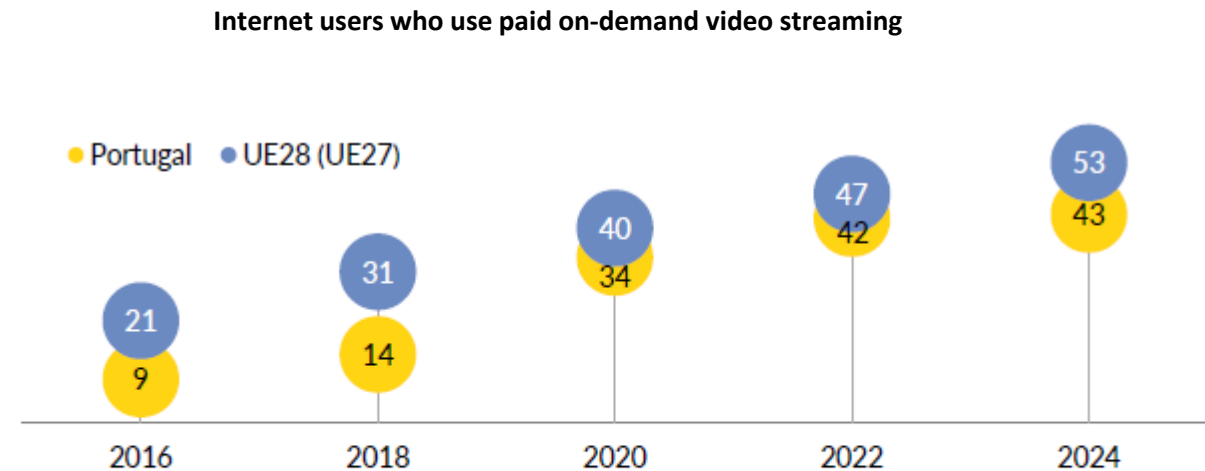
Changes in consumer behaviour

On-demand audiovisual services

Effects of Covid-19 lockdowns: **increase in domestic consumption of audiovisual services, especially paid on-demand video streaming** (source: ANACOM)

In 2024, 43% of Portuguese internet users subscribe services such as:

- Netflix, NosPlay, FoxPlay (2015)
- Amazon Prime and Filmin (2016)
- HBO Portugal and Apple TV+ (2019)
- Acorn, Disney Plus and Opto (2020)



Unidade: %

Fonte: Comissão Europeia, *Information and Communication Technologies Usage in Households and by Individuals* (2016, 2018, 2020, 2022 e 2024)

Nota: População com idade entre 16 e 74 anos que utilizou Internet nos últimos três meses

Changes in consumer behaviour

On-demand audiovisual services

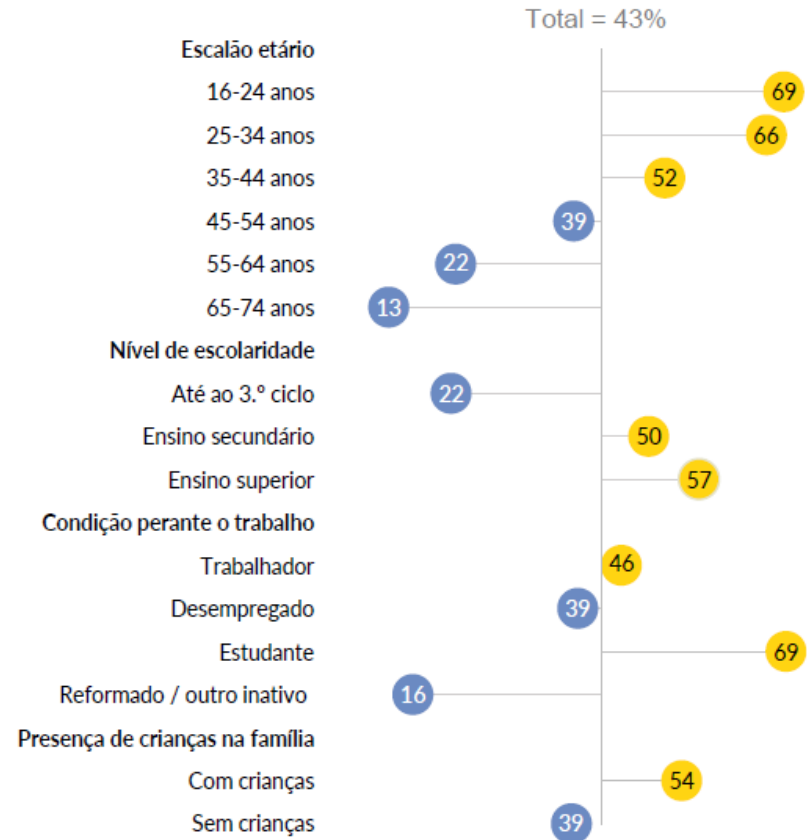
Consumo:

- Negative correlation with age
- Positive correlation with educational level

More pronounced among workers and students

- More pronounced in families with children

Internet users who use paid on-demand video streaming – sociodemographic profile



Unidade: %

Fonte: Comissão Europeia, *Information and Communication Technologies Usage in Households and by Individuals* (2024)

Nota: População com idade entre 16 e 74 anos que utilizou Internet nos últimos três meses de acordo com a respetiva característica

Changes in consumer behaviour

structural effects

- Deprofessionalisation of information production (more non-journalistic information available to the public, less interest in journalistic content, less ability to capture attention and, consequently, resources).
- Lack of journalistic content curation: lack of mediation and editorial control/verification. Proliferation of content that is not subject to ethical and professional standards (differences and consequences).
- Concentration of decision-making powers over what is produced and control over the visibility of content. No democratic control over platforms and networks (e.g. algorithms, prominence).

Changes in consumer behaviour

structural effects

- Weakening of editorial independence: the traditional separation between media ownership and content production (established in sectoral laws - press, radio, television) does not apply to these platforms.
- Threat to cultural diversity: public attention is shifting from national television to streaming services and from local/independent production to the production of these platforms (series). Impact on citizens' knowledge of their culture, country and reality — in terms of information, fiction and entertainment.

Regulatory challenges associated with the digital environment

From a regulatory standpoint, digital transformation raises issues related to:

- Protection of minors from content offered by on-demand audiovisual platforms and services
(algorithms do not contribute to diversifying tastes)
- Combating information disorders (scale and speed)
- Safeguarding journalism, both its existence and its quality

Regulatory challenges associated with the digital environment

- Safeguarding the integrity of democratic electoral processes
- Migration of audiences to unregulated media that fulfil the traditional role previously played by the media
- Accentuating inequalities regarding access to the media and media literacy

General media regulatory challenges:

- Jurisdiction (border, sectoral)
- Coordination with European counterparts and other authorities (eg. security)
- Legislative adaptation
- Financial globalisation (transparency of ownership; interference of economic powers in editorial choices (eg. WOF/GMG))

General media regulatory challenges

- The very existence of journalism (need of alternative business models, quality of public debate; social cohesion, community building and local/national identities)
- The rights to information and culture are at stake (fundamental human rights)
- Environmental costs of digital communication systems, including artificial intelligence tools
- Regulation of the media in times of uncertainty (how to preserve memory and develop thinking about alternative futures).

Media's core functions in exceptional situations – the role of analogue communications

Providing information (keeping people up to date with what's happening and what to do) and fostering social cohesion (keeping people connected to the world)

Pandemics * Armed conflicts * Cyber security attacks
Disasters (fires, earthquakes, weather events) * Energy supply disruptions

Rethinking the role and place of analogue media, journalism and editorial independence

Media are not just about defending democracy; in critical times the media (including analogue) might have an existential role.

Thank you!

MASTER'S IN EUROPEAN AND INTERNATIONAL LAW
International Studies Programme (ISP Dialogues)

Regulatory challenges

Helena Sousa

ERC- Entidade Reguladora para a Comunicação Social/
Portuguese Media Regulator