

SOUTH KOREA

Relatively healthy, still trying hard to adapt to digitalisation

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Introduction

South Korea is a relatively small country with a land size of 100,033 square kilometres and a population of 52 million. Despite its history of colonisation, war, and authoritarian regimes, South Korea has emerged as a liberal democracy and is well-known as one of the leading countries in developing and adopting communication technologies. Politically, South Korea is now considered a “full democracy”, moving from the classification of “flawed democracy” in 2020, according to The Economist Intelligence Unit’s (2020) Democracy Index 2020.

Freedom in the World 2021: status “free” (Score: 83/100 (Freedom House, 2021).

Liberal Democracy Index 2020: South Korea is placed in the Top 10% bracket – rank 17 of measured countries and with a score of 0.78, considerably up from rank 37 in 2016 (Varieties of Democracy Institute, 2017, 2021).

Freedom of Expression Index 2018: rank 13 of measured countries, considerably up from 65 in 2016 (Varieties of Democracy Institute, 2017, 2019).

2020 World Press Freedom Index: rank 42 of 180 countries (Reporters Without Borders, 2020).

While these numbers show how far the country has come, South Korea has its fair share of challenges and struggles when it comes to freedom of the press and democratic media practices.

News media in South Korea is saddled with a history of partnership and complicity with political power under authoritarian rule. Some of the legacy media companies that emerged in such a setting are still very much influential and thrive as cultural producers in South Korea. Although less so today than in the past, journalists consider politics as one of the top five factors that interfere

with the freedom of the press. Specifically for the two broadcasters Korean Broadcasting System (KBS) and Munhwa Broadcasting Corporation (MBC), the President and the ruling party have absolute control over the hiring of the company president and the chairman of the board. The public broadcaster in South Korea is always heavily criticised for aligning itself with whichever party is in control of the presidential office. Adding to this, the plethora of journalists turned congressmembers and public officers has given rise to internal criticism that journalists, without any external pressure, are voluntarily becoming more sensitive to political power. Especially in the recent polarised political environment, public cynicism stands out as a serious problem, as newspapers and journalists are often conflated with either the conservative or the liberal camp, regardless of the quality of journalism. Active watchdog functions run the risk of being dismissed or discounted as protecting one's own camp from the opposing camp.

On the surface, the focus of power seems to have shifted from the government (authoritative, military regimes) to advertisers and corporate sponsors and, to some extent, it has. The law restricts *chaebols*, or large powerful groups of companies involved in various kinds of business, often referred as conglomerates, which are distinctive in South Korea. For the newspaper market, this means that family-run conglomerates in newspaper ownership are restricted and prevented from owning more than half of the shares of any newspaper. But as the legacy of the development economy era, mainly through 1970s and 1980s, remains, *chaebols* still wield significant power in the South Korean economic structure. The sheer amount of advertising contracts from these companies gives them substantial market power, and critical reporting on these *chaebols* is still very much limited by such structural restraint.

As of 2018, there are 221 daily print newspapers printed by 192 newspaper companies in South Korea. 30 are national general dailies, but just 11 of these national general dailies account for 97.8 per cent of the revenues made by the national general daily newspapers. There are 65 other daily newspapers including 14 economic dailies, 8 sports dailies, and 5 dailies printed in foreign languages. 38 are categorised as other special daily newspapers. 124 regional general dailies and 2 free dailies are also in print. There are also 1,292 companies printing 1,376 weekly newspapers including 54 national general weeklies and 548 regional general weeklies. Of these, a total of 34 newspapers (including the 11 major national general dailies) are required to regularly file financial reports with the Korean Financial Supervisory Commission and publish them online.

In terms of newspaper circulation, *the Chosun Ilbo* tops the list at 1,308,395 copies, followed by *JoongAng Ilbo* (978,279), and *Dong-A Ilbo* (965,286). *Maeil Business Newspaper* is ranked fourth (707,749), with *Hankyoreh* (214,832) and *Kyunghyang Shinmun* (190,745) placed seventh and tenth on the list, respectively. The largest regional daily newspaper is *Busan Ilbo* (144,073),

which caters to readers in Busan, the second-largest city in South Korea. Regardless of the scale, revenue and profits have kept falling fast.

The number of broadcast channels that carry newscasts, television, and radio combined is 42, with 8 public broadcasting channels, 15 commercial channels, 10 religious or other special channels, 6 general cable television channels, and 3 terrestrial digital multimedia broadcasting channels. As for the radio news media, there are four public radio stations, two commercial, two regional, eight religious, and two specialised news stations. Early drive-time news shows offering straight news and commentaries are fairly influential.

Policy changes in the early 2000s triggered transformation across the media landscape in South Korea. Strict media regulations restricting conglomerates, newspapers, and foreign capital from entering the broadcasting industry were lifted in 2000 with the Broadcasting Act, and the free channel registration system introduced in 2001 allowed media companies to enter the industry as programme providers. This led to a significant rise in the number of television and radio channels as well as channel providers.

In the past few years, news consumption through mobile devices has become prominent in South Korea. In recent years, there has been a striking rise in news consumption on social media and YouTube. The trend of decreasing subscription to print newspapers continues, but more people are accessing news through Internet portals on their smartphones.

Like in many other parts of the globe, fake news receives much attention in South Korea. Legislative moves toward regulating fake news and incorporating media literacy into the national educational curriculum are being taken to fight unreliable and deceptive information.

Different laws and agencies regulate different forms of media. The Act on the Promotion of Newspapers (the Newspaper Act) is regulated by the Ministry of Culture, Sports, and Tourism, which governs newspapers, including online newspapers. Broadcast communications are governed by the Broadcasting Act and the Internet Multimedia Broadcast Services Act. The latter governs businesses delivering broadcasts through Internet protocols, and both are regulated by the Korean Communications Commission and the Ministry of Science and ICT (MSIT). Although there are no laws that specifically govern OTT or online media, the Telecommunications Business Act (TBA) regulates services provided through telecommunications technology.

In 2018 and 2019, there were noteworthy governmental and institutional efforts to regulate Internet portal services like *Naver* and *Daum*. The portal news services are unique in that when a reader clicks on an article, they are presented with the article on the portal site via an “in-link”, rather than being directed to the article on the news media’s website via an “out-link”. The current law classifies portals as value-added telecommunications business operators. Portals have been excluded from the competition assessment review in the past as it

is difficult to define their markets, since they provide a wide range of services including Internet search, advertising, shopping, news, and video streaming. In 2018, an opinion-rigging scandal occurred where the view counts and likes for certain news articles on *Naver* were purposely manipulated with a computer program by a blogger. 17 legislations related to the online portals were then introduced in Congress, which included regulations on the “in-link” system being used to provide news articles to portal users and comments sections on portals. *Naver*, through internal decision, withdrew from news editing on its news section and removed the news list on the mobile front page in 2019. Later in 2019, taking a move interpreted as a gesture to bring the online portals into the boundaries of government regulation, the Fair Trade Commission launched an investigation into *Naver*’s abuse of its market dominance, for deliberately placing items from its own shopping, real estate, and video platforms at the top of its search results. There is an ongoing debate regarding whether these news mediation services which provide gateways to the news by presenting news, in a specific format and order, should be considered as news media, even though they do not produce news themselves.

Covid-19

In early 2020, due to the Covid-19 pandemic, all public attention was on news media reporting the numbers of cases and deaths every hour or so. Ratings and clicks on the pandemic news sky-rocketed, but at the same time, they were criticised on two aspects. The first was instilling too much fear backed by only flimsy scientific evidence. However, the urgency and uniqueness of Covid-19 required news media to continue reporting even if with uncertainty. The second point of criticism was privacy infringements, with details of movements of those with confirmed cases being revealed to the public. Whether this fear contributed to South Korea’s success in terms of dealing with this pandemic is yet to be assessed, but it certainly contributed to voluntary lock-downs and social distancing, with South Korea never officially experiencing total lock-down.

Policy-makers, such as the Korea Communications Commission, are reported to have initiatives in collaboration with Internet portals to join forces to combat fake news, especially related to Covid-19, but no concrete moves have been reported yet. They make effort to enforce the deletion of personal information of the confirmed patients and the places they visited after 14 days.

Leading news media sample

Leading news media in South Korea can be grouped into three categories. One is the terrestrial broadcasting networks, one of which was originally established

as a national broadcast service and has since held the status of the public broadcasting service. Two commercial broadcasters are also in operation. The second category is a group called “top”, consisting of six national newspapers: *the Chosun Ilbo*, *JoongAng Ilbo*, *Dong-A Ilbo*, *Hankyoreh*, *Kyunghyang Shinmun*, and *Hankook-Ilbo*. *Chosun*, *JoongAng*, and *Dong-A* are typically categorised as conservative news media, while *Hankyoreh* and *Kyunghyang* are liberal. Despite some controversy, *Hankook-Ilbo* takes a centrist political stance. The third and the newest group to join the news industry is several cable networks, which were specially licensed to carry news. The six cable networks, JoongAng Tongyang Broadcasting Company (JTBC), TV Chosun, Channel A, Maeil Broadcasting Network, Yonhap News TV, and Yonhap Television News (YTN), are bi-media, in that they also issue print newspapers. It is worth noting that the broadcast programmes of these bi-media are sometimes considered to have a more conservative tone than their print counterpart. Conservative media outlets might appear to be greater in number, but the two conservative presidencies and impeachment of former President Park by the citizen’s revolution (“Candlelight Revolution”) have made the political climate more hostile to conservatives in general. As a result, conservative media outlets are often discounted as a single power group and criticised by citizens in the liberal camp.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 3 POINTS

Traditional news media content is available nationwide. Backed by strong digital infrastructure, multiplatform delivery via online portals, YouTube podcasts, and news websites ensures widespread news media availability.

Regarding print media, most national dailies are available either in a single issue or by subscription around the country. Subscription is more common than newsstand purchases, and newspaper distribution centres handle 93.9 per cent of newspaper deliveries, while 5.3 per cent of the deliveries are made by the postal service (Korea Press Foundation, 2019c). Delivery by mail is usually offered for areas where distribution centres are unable to deliver due to transportation or cost issues, at an extra or no cost for the subscriber depending on the newspaper. While national general daily newspapers are still readily available in most parts of the country, recent changes in news media usage have added to the pressure on print news media. As a result of continued decreases in newspaper subscriptions and readership, the average time of newspaper use has

become 4.2 minutes, and the household subscription rate hit an all-time low of 6.4 per cent (Korea Press Foundation, 2019b). The net income of the print news media continues to decrease (Korea Press Foundation, 2019d), leading to cut-backs in the number of local distribution centres. However, all major national daily newspapers are also available online on the official newspaper websites or portals like *Naver* and *Daum*, and access to news content is fairly easy. The free newspapers are distributed at major subway stations, bus terminals, and community or district offices.

The television landscape in South Korea consists of terrestrial, general cable, satellite channels, and cable channels, and television news is available on four public television channels, eleven commercial channels, and six general cable channels. KBS, MBC, and Educational Broadcasting System operate the four public television channels and are available nationwide. KBS is the national public broadcasting company of South Korea and operates two generalist television channels, KBS 1TV and KBS 2TV. The former presents news programmes, current affairs, culture programmes, and sports programmes, while the latter is more geared toward educational programmes, television dramas, and variety shows. *KBS News 9* has been the prime-time news programme on KBS 1TV since 1964. Its rival news programme, *MBC Newsdesk*, is aired by MBC, a generalist public broadcasting company funded by a public organisation that is often considered a commercial broadcaster, since it operates on advertising. Finally, the Educational Broadcasting System runs a single public television channel specialising in educational programmes.

As the biggest commercial broadcaster, Seoul Broadcasting System (SBS) offers a wide variety of programmes, ranging from newscasts and investigative programmes to television dramas on its channel, and offers *SBS 8 News* as its prime-time news programme. KBS, MBC, and SBS long dominated the television industry as the three major rival national terrestrial television networks. In 2019, news programmes took up 29.2 per cent and 8.4 per cent of the airtime on KBS 1TV and KBS 2TV, respectively, while MBC designated 18.6 per cent of its airtime to news programmes. All three broadcasters have local broadcast stations around the country addressing the audience outside the metropolitan area of Seoul, Incheon, and Gyeonggi-do. KBS and MBC each have more than 18 regional broadcast stations and SBS partners with nine local commercial channels to serve audiences in different regions.

JTBC, TV Chosun, Channel A, Maeil Broadcasting Network, Yonhap News TV, and YTN launched as general cable channels in the wake of a major media law revision in 2009, and since then have gained the upper hand on the three major terrestrial channels. JTBC, TV Chosun, Channel A, and MBN are generalist channels, and Yonhap News TV and YTN are 24-hour news channels. These channels are available on cable, Internet protocol television (IPTV), or satellite service subscriptions. Television news channels from other countries

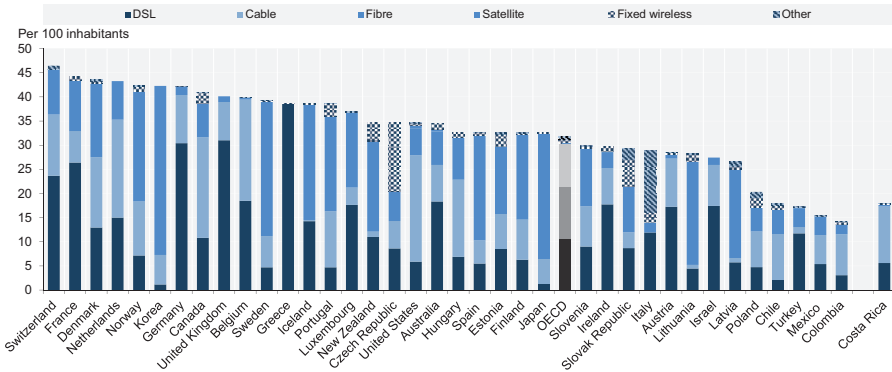
like CNN, BBC World, Al Jazeera, CCTV4, and CNBC, are also available in select subscription plans.

Infrastructure plays an important role in ensuring access to news broadcasts, and South Korea, like many other countries, has shifted to digital television. In December 2012, terrestrial analogue television services were terminated as a part of the 14-year-long national project for the “digital turn” planned by government agencies in 1999. With this transition, either a digital television or a converter for an analogue television became required to receive any television channel. Cable channels are still available on analogue television, but the gradual rise in digital television ownership shows that the transition is more or less complete. In 2018, 96.5 per cent of households were estimated to have one or more television, and 90.3 per cent were estimated to have at least one digital television, with only 9.4 per cent of households owning an analogue television. In 2018, 93.2 per cent of households were estimated to be customers of subscription services.

The radio landscape in South Korea consists of 18 radio stations, of which KBS operates three, and MBC and SBS operates a station each. Except for YTN News FM, which specialises in news broadcasts, and Traffic Broadcasting System, which offers a news bulletin every other hour, only KBS 1Radio and MBC FM carry news bulletins around the clock. Other channels offer two to three news bulletins throughout the day. Radio signals are transmitted to analogue radios, but KBS, MBC, SBS, YTN, and Traffic Broadcasting System radio stations are also all available online or on smartphone applications.

In terms of online access and news, South Korea is known to be one of the best-connected countries in the world. In 2018, the Internet penetration rate was 95.9 per cent (OECD, 2018a), and the household Internet access rate was 99.5 per cent. South Korea has consistently ranked at the top in Internet connections in the past few years and had the greatest percentage of fibre connections in total fixed broadband in 2018, boasting one of the fastest Internet speeds in the world (see Figure 1). In terms of the urban and rural digital divide, broadband is unavailable in some rural areas, and mobile Internet use is lower in county-level cities (74.5%) than in metropolitan cities (89.9%). Despite these limitations, government-initiated policies and programmes for digital infrastructure have promoted nationwide adoption of broadband Internet, and South Korea has the second-most connected rural areas among the OECD members.

Figure 1 OECD fixed broadband subscriptions by technology, June 2019 (per 100 inhabitants)



Source: OECD, 2018a

The number of online newspapers and news services has grown exponentially since 2005, when the Act on the Promotion of Newspapers was revised to include online news providers. In 2018, 2,900 companies were publishing 3,573 online newspapers, 966 of which were based offline and 2,571 were based online.

Online portal services are widely influential in South Korea, and they are the most popular news source after television. *Naver* and Kakao's *Daum* are the two most-used portals, dominating online traffic. They provide a wide array of content and services like a search engine, e-mail, blog, and social media, as well as news articles from many different media outlets in their news sections. As influential as these Internet portals are, their status in the news media industry is still very much undefined. Though making news more accessible online by distributing news from a wide range of partnered news media, these portals were recently criticised for discriminating against regional newspapers by eliminating them from their partnered news media list after an update of the news search algorithm.

The digital turn has further added to the variety of platforms that not only help access information and news, but also invite audience participation. Not only do the major television news channels operate their own YouTube channels, where television reports and live news can be streamed at any time, but individual and business channels create and upload commentaries, interviews, and videos on a wide range of topics. Podcasts are another medium that provide new ways of consuming news, by allowing listeners to stream regular radio or television programmes on-demand and subscribe to or run their own channels.

The Broadcasting Law (Chapter V, Article 69) stipulates that any broadcasting business provide Korean sign language, closed-caption subtitles, screen commentaries, and so forth, to assist people with disabilities in viewing broadcasts.

By law, the Korea Communications Commission subsidises broadcasters with the expenses incurred in providing these services, or supplies receivers purchased by the Broad Communications Development Fund for people with disabilities.

Standards and procedures for selecting operators of public access channels or “public-interest channels”, as defined by law, are prescribed by a Presidential Decree, and the operators are chosen from the cable television broadcasting and satellite broadcasting businesses every other year. In 2019, there were a total of eleven public access channels in three different categories: social welfare, science and culture, and education and local channels.

(F2) Patterns of news media use (consumption of news) 2 POINTS

The changing media use patterns reflect the digital turn in the media industry of South Korea. With 92.3 per cent of the adult population getting news from either television or the Internet, interesting patterns emerge between different age groups. Legacy media are in greater use among the older population, while Internet-based media are a major news source for younger people.

In South Korea, television has traditionally been the most influential form of media. Television remains popular with a penetration rate of 90 per cent for the adult population, but the digital shift has changed the way people watch television and television programmes. Television programmes are no longer reserved for televisions but are also accessible online via personal computers (PCs), smartphones, and other mobile devices. This has resulted in television programmes reaching a greater portion of the adult population (91.6%) than television did. Television news programmes reach 82.8 per cent of the population. 75.6 per cent of the adult population watch television news programmes more than two days a week, with 47 per cent watching television news every day. Despite a continued decreasing trend in use, television remains the most-used medium, with an average weekly viewing time of 143.2 minutes and television news viewing time of 48.4 minutes. News usage share by media sector (categorised by the type of devices used) also shows that television is still the most popular news media among the news audience, with a usage share of 45.3 per cent in comparison with that of newspaper and Internet, which have a share of 9.2 per cent and 40.4 per cent, respectively. However, a closer look into the television news usage share shows that terrestrial television channels, once the dominant news outlet in the country, now have the news usage share of 17.8 per cent, with general cable channels and specialised news channels’ share together reaching 27.5 per cent (Public Opinion Concentration Survey Committee, 2018).

In contrast to its glory days in the 1990s when the print newspaper was the second-most used medium and its penetration rate reached 87.8 per cent, print

newspapers are read by a mere 12.3 per cent of the population today, exclusively for news. The subscription, readership, and reading time of print newspapers have consistently decreased since 2011. The Media Consumer Research reported that the print newspaper subscription rate fell to the level of 6.4 per cent and the time spent reading print newspapers to 4.2 minutes in 2019. In terms of newspaper circulation, *the Chosun Ilbo* tops the list at 1,308,395 copies, followed by *JungAng Ilbo* (978,279) and *Dong-A Ilbo* (965,286). *Maeil Business Newspaper* is ranked fourth (707,749), with *Haynkyoreh* (214,832) and *Kyungbyang Shinmun* (190,745) placed at seventh and tenth on the list, respectively. The paid circulation data from Korea Audit Bureau of Certification show that these six national print dailies are among the ten most-circulated newspapers in South Korea. *Chosun Ilbo*, *JungAng Ilbo*, *Dong-A Ilbo*, *Hankyoreh*, and *Maeil Business Newspaper* are the top brands in terms of weekly usage percentages (Newman et al., 2019). While *Chosun Ilbo* is the most-read print daily newspaper, it ranks at the bottom in terms of brand trust. *Hankyoreh* and *Kyungbyang* are the most and second-most trusted print dailies by those who have heard of the titles. While trust in the news in South Korea is consistently low, print news is even less trusted, and all the print newspapers discussed above place at the bottom in the brand trust ranking when compared with television news media. Other periodicals declined in their reach by 25.9 percentage points since 1996, and 1.3 per cent of people still get news from them.

Most striking in recent years has been the rise of Internet-based media as the news media of choice, especially on mobile devices. As of 2019, the reach of Internet-based media is 86.7 per cent, with 80 per cent of the adult population using Internet-based media to access news. Preference for mobile devices over PCs became even starker, with only 21.1 per cent of the population using a PC to access the news and 79.6 per cent using mobile devices. 37.2 per cent of adults get news on their mobile devices and 3.3 per cent on their PC every day. Altogether, 79.6 per cent of adults consume news online at least once a week on their mobile devices. On average, people spent 21.5 minutes and 4.8 minutes reading or watching the news on their mobile devices and PC, respectively.

Looking at the platform through which people get news on the Internet, 73.6 per cent gets news from an Internet portal like *Naver* or Kakao's *Daum*. The Internet portals provide a wide range of services and reach 81.8 per cent of the population on either PC or mobile devices, and have become one of the most influential media in the country. Another interesting change has been the rise of online video platforms like YouTube, Naver TV, and Afreeca TV as popular online news media channels. The use of these platforms for news rose from 6.7 per cent in 2018 to 12 per cent in 2019. All major broadcasting companies run a channel on at least one of the video platforms, and JTBC, YTN, and MBC topped the list as the news outlets that reached the greatest number of people on these video platforms.

It is important to note the status of Internet portals as news media, because while Internet portals do not produce their own news articles or programmes and act only as go-betweens, they are still believed to be some of the most important news media by South Koreans. The three largest portal sites, *Naver*, Kakao's *Daum*, and *Nate*, have 55.4 per cent, 22.4 per cent, and 7.4 per cent share, respectively, in online news article consumption. The concentration ratio (CR3) reaches 85.2 per cent, and the Herfindahl-Hirschman Index in online news article consumption is 3,638 (Public Opinion Concentration Survey Committee, 2018). Internet portals distribute articles and stream content uploaded by the programme providers, but 64.2 per cent of the adult population saw it as a news medium, with the vast majority of those in their 20s believing it to be so (76.8%). *Naver*, the most-used Internet portal in South Korea, ranked second in the most influential media company after KBS in the *Survey of Media Audiences' Perception* and was the fourth most-trusted media company after KBS, JTBC, and MBC, despite not being a news outlet that produces original content (Korea Press Foundation, 2019a). News on the Internet portal also scored 3.19 out of 5 in reliability, which is comparable to the reliability score of print news media (3.21).

Despite an overall increase in digital media use, polarised patterns in news media use habits across different age groups are becoming more prominent. Most of the news audience in their 20s get news predominantly from the Internet (77.7%), but 89.5 per cent of those older than 60 get news from the television, and only 4.6 per cent of this group use the Internet for news. Use of television for news is significantly lower in the younger groups, with only 10.1 per cent of those in their 20s and 25.4 per cent in their 30s watching television news.

The digital turn is even more visible in teens' news consumption patterns. 66.2 per cent of teens access news on the Internet, 52.8 per cent get their news from television, and only 7.8 per cent use print media. In terms of the platforms of choice for news consumption, social media has the greatest reach (41.4%), with online video platforms (39.8%) and messenger services (35.1%) following closely. This shows a significant change in news consumption habits, considering the reach of social media (10.8%) and messenger services (13%) among adults.

(F3) Diversity of news sources

2 POINTS

The national news agency plays a dominant role, and the number of foreign correspondents is falling. Despite the existence of many different news sources that journalists rely on, certain gender and minority groups are under-represented and sources tend to be selected based on the political position of the given news outlet.

While there are a total of 24 news agencies in operation, few news agencies play dominant roles as news providers, while Yonhap News Agency (YNA) plays a

key role as the national news agency. As mandated by law, YNA (2018) provides news, pictures, and other data, domestically and overseas, to the state and other public institutions and research organisations. YNA serves the purposes of “protect[ing] information sovereignty, narrow[ing] the information divide and satisfy[ing] citizens’ right to know” (Ministry of Culture, Sports, and Tourism, 2017: art. 10, 1–2). YNA is funded by the Korea News Agency Commission, which was founded to govern the news agency. The seven board members of Korea News Agency Commission are appointed by the President, with three of them nominated by the National Assembly Speaker and one each by the Korean Association of Newspapers and the Korean Broadcasters Association. Korea News Agency Commission owns 30.77 per cent of the agency, with the rest of the shares distributed among public broadcasting companies and other national dailies. YNA has been criticised at different points in its history for holding pro-government views, and given the ownership structure of YNA, concerns have been raised about the internal pressure on fair reporting standards.

YNA doesn’t just supply domestic news media with news content, but also directly services the news audience, which has given rise to some complaints about it taking readership shares from non-government funded news media. While YNA services almost 200 newspapers, broadcasters, and online news media – including all the major media conglomerates – it also operates its own website and has partnered with major Internet portals to be displayed as a news outlet alongside its partners. Newsis and News1 also supply news to major media groups and Internet portals as two of the major commercial news agencies, but both are controlled by the same media group. As for the overseas network, they are partnered with Associated Press in the US and Xinhua News Agency in China and supply domestic news media with foreign news content. YNA has partnerships with many major news agencies – Associated Press, Reuters, and Agence France-Presse, to name some – with a total of 88 partner news agencies. In 2019, YNA had 34 reporters in 23 major cities in 18 countries, which was a significant drop from 47 correspondents in 36 major cities in 27 countries in 2014 (Korea Press Foundation, 2019d). YNA’s downward trend in the number of overseas correspondents is in line with an overall industry cutback on overseas networks, as digital platforms like YouTube, social media, and news media websites have made it easier and much faster to access information from around the world.

Outside of the partnership with news agencies, newspapers and broadcasters do not have any active content syndication in South Korea. Most of the major print national dailies and national broadcasters have their own correspondents in the US, Japan, and China, but few news outlets have correspondents in other parts of the world, with a couple in Europe and even fewer in Southeast Asia and Africa. Without the means to conduct first-hand original reporting, these news outlets must rely on major news sources abroad for international news, at

the risk of also absorbing political and cultural biases. This explains the criticisms of Korean news media for lacking international news and perspectives.

The *Korean Journalists Survey 2019* showed that journalists are most reliant on field investigation and direct interviews with the source, but that they also use several different sources including professional reports, press releases, tips from general public, and reports from other news media (Korea Press Foundation, 2019c). When asked to rate how much they rely on each news source on a five-point Likert scale, the journalists gave press releases an average score of 3.45, ranking it in third place in news sources they rely on the most, after field investigation and expert reports and data. Coverage from a different news outlet ranked fifth place at 3.06, after tips from the general public (3.16). A comparison of different media outlets showed that journalists from news broadcasters were most reliant on field investigation (4.14), followed by journalists from print newspapers (4.05) and those from news agencies (4.03). On the other hand, journalists from news agencies relied on press releases (3.64) more than journalists from any other news outlets did. When asked to evaluate the reporting conditions, easy access to news sources and informants and informant cooperation were rated the highest (3.29 and 3.19, respectively), and access to expert reports and data was rated the third (3.01). Access to information upon request, however, was low overall (2.87), indicating possible challenges in the research stage of reporting.

The *2018 Media Diversity Survey* showed the lack of representation in news media in terms of diversity in news-making (Wook-jae et al., 2018). The survey offered a look into diversity in the six major television channels. None of the channels represented a sexual minority in their news programmes; the majority of news informants were men (74.4%), while only 25.6 per cent were women. 55.7 per cent of the news informants were between ages 50 and 69, and considering that only 27.7 per cent of the population is in this age group in the 2018 resident registration survey, the survey suggests that privileged groups in the traditional patriarchal society are over-represented. The news sourcing patterns also reflect a substantial reliance on elite sources: 34.7 per cent of informants on television news were from management-level positions, although they account for only 0.8 per cent of the population in reality, and 29.7 per cent of the informants were experts in their fields, while they represent only 12.6 per cent of the population.

Gender diversity is still lacking in many ways; however, it is worth noting that there is clearly increasing awareness in terms of gender-sensitive expressions in news reports. Some newspapers make extra efforts to balance the gender ratios of opinion-column writers who are recruited from outside.

In terms of active investigative journalism, South Korea is at a turning-point. Younger reporters feel the need to drastically increase investigative journalism to differentiate themselves as a quality news outlet, but senior reporters and

desks are a bit hesitant, partly due to cost concerns and uncertainty related to successful reporting.

(F4) Internal rules for practice of newsroom democracy 2 POINTS

Although leading news media are politically polarised, journalists can reasonably voice their views on the selection and framing of the news. Affirmative policies regarding female journalists are not yet set as a part of general newsroom culture.

Newsroom democracy ensures journalistic freedom and fosters fair and balanced reporting by opening up the discussion of news selection and coverage. There's been an increasing awareness of the importance of internal freedom in the news industry, as advertising and investments have come to have an increasing influence on news coverage in addition to influence due to ownership structure. While the newspaper law (Chapter 1, Article 5) indicates that a general daily newspaper may run its newsroom council, it requires neither newsroom council nor editorial guidelines. Some major news media have newsroom councils, often under the labour union, and most have editorial guidelines of their own. Demands for, as well as pushes against, making amendments on the current newspaper law to require editorial guidelines and newsroom councils isn't something new. The 2009 amendment of the media-related laws that legalised cross-ownership of newspapers and broadcasters eliminated articles on promoting newsroom councils and editorial guidelines.

Most recently, in 2019, the National Union of Mediaworkers demanded the amendment of the newspaper law to make the newsroom council mandatory and to require the inclusion of news staff representatives in the council, but no bill has been introduced to the congress yet. The broadcasting law, on the other hand, includes fairly detailed instructions on how to ensure freedom of the press and internal democracy. The broadcasters must assign broadcast programming managers and present their names at least once daily during the broadcasting hours while guaranteeing freedom in programming for them. The law states that the freedom and independence of broadcast news programming shall be guaranteed. The broadcast news companies should institute a covenant on news programming, in consultation with the employees in charge of news, and make a public announcement. Interviews show that the discussions in the newsroom regarding which news to report and kill or which framing the story should take are overall freely conducted. Although the final say goes to the senior desk staff, the opinion of the individual reporter is almost always heard.

When asked about the direct and indirect factors that interfere with the freedom of the press, the editorial executive officers were ranked the second-most influential following the advertisers, more influential than the company

owners, whose influence was almost nil. The responses to questions about freedom at different stages of reporting showed that journalists feel they have the greatest freedom in the writing process. Journalists' freedom in each of the three stages of reporting, selection of the story, article writing, and the final decision to publish the reporting, was scored out of five points and garnered 3.84, 3.95, and 3.71, respectively. There were some differences among the media types, with journalists from Internet media enjoying the greatest freedom, while broadcast journalists had the least freedom in the overall reporting process. The differences seem to stem from the difference in tradition and scale of operation.

Awareness of gender diversity in the newsroom is definitely on the rise, but there has been no instance of explicit internal rules to support and promote female journalists' careers and their access to managerial positions.

(F5) Company rules against *internal* influence on
newsroom/editorial staff

2 POINTS

Independence from advertisers is held as a principle, and many reporters do not encounter daily pressures. But higher-ranking journalists do feel pressure and have to sometimes arrange something for advertisers, via the advertising and sales department.

Independence from owners and management is strongly supported. However, in practice, newsroom operation is not free from linkages with the advertising and sales department. This link with advertising and sales seems to be done at the level of senior desk staff, while reporters claim that the advertising and sales department's operation is separate from the newsroom.

With subscriptions dipping and the share of advertising revenue declining, some say it is a matter of survival, not a matter of growth and profitability. It seems that important stories do not get killed by advertising concerns, but some stories do get carried due to the public relations demands of certain parties and corporations. In the case of critical stories, advertising pressure cannot completely kill the news but can influence the size or tone of the story. Interviewees said that that front-page news is protected from such influence.

Divisions covering industry and business often initiate a story and ask specific sponsors to buy the story by paying a special sponsorship. Major newspapers have several awards set up (e.g., the best investment banker of the year, creative business of the year) and indirectly ask for sponsorship to those selected. They may say this is totally separate from editorial decisions, but it is highly likely that the opposite is true.

(F6) Company rules against *external* influence on newsroom/editorial staff

1 POINT

Partly due to the structure of the economy, in which a few conglomerates dominate the demand for advertising space, and partly due to declining paid subscription for the news, leading news media depend more on advertising revenue. They also must be creative in devising other indirect advertising products such as advertorials, branded content, and so on.

Growth in revenue from online content licensing stands out across the entire newspaper industry. Revenue from sources other than online content declined in comparison with the previous years, but advertisement remains a major source of income for many news media. Print newspapers, through years of declining readership and subscription, have diversified their income stream to make up for the losses in sales. In 2018, the newspaper industry relied the most on advertisement as a source of income, with advertisements accounting for 60.1 per cent of the total revenue of print newspapers KRW 1,990 billion. This was an increase from 59.6 per cent of the total print dailies' revenue coming from advertisement in 2017. Only 11.8 per cent of the total revenue in the print newspaper industry was from sales (KRW 390 billion) in 2018, and income from online content licensing accounted for 8.2 per cent of the income (KRW 272 billion). Other additional businesses accounted for 19.9 per cent of the total revenue in the daily print newspaper industry in 2018.

Advertisement is also the biggest source of revenue in the online newspaper industry, accounting for 61.5 per cent of the total industry revenue at KRW 301 billion in 2018, showing a slight decline in advertisement's share in the total online newspaper revenue, from 62 per cent in 2017. Online newspapers are available free of charge, which means there is no sales revenue. 32.4 per cent of revenue comes from other business activities, and only about 8.4 per cent of the industry revenue comes from online content licensing.

The revenue structure in the broadcasting industry seems more balanced, with advertising revenue on the decline over the past five years, from 48.7 per cent in 2013, but the income breakdown suggests that broadcasters may still be vulnerable to significant external pressure. In 2018, 34.1 per cent of industry revenue came from advertisement and 10 per cent from sponsorship earnings. Income from reception fees accounts for 12.6 per cent and programme sales account for 16.7 per cent. Key income sources vary based on the broadcaster's ownership structure. As the public broadcaster, KBS operates under an annual budget; for financing, the chief executive officer sets an annual budget, which is then approved by the board of directors and submitted to the Korea Broadcasting Commission. The budget is exempt from prior congressional approval for the sake of independence and impartiality, but the finalised account must

be approved in congress after the end of every tax year. KBS is also the only broadcaster that charges a monthly reception fee to fund itself. In 2018, KBS earned 46 per cent of its income from the reception fees, 23.2 per cent from advertisement, 12.9 per cent from programme sales, and 5.6 per cent from sponsorship. MBC and SBS, however, relied on advertisements the most (40.1% and 41.1%, respectively), followed by programme sales.

A 2015 report from the liberal Democratic Party's Institute of Democracy (Kim & Lee, 2015) pointed out the dominance of conglomerates in the media advertising market, suggesting that concentration of market power with a few advertisers may compromise the freedom and independence of the press. The study's focus was the biggest four conglomerates in South Korea: Samsung, Hyundai Automobile, SK, and LG. The results showed that all three of the major terrestrial broadcasters have the highest proportion of Samsung advertisements. Hyundai Automobile is dominant in the four major general cable channels except for JTBC, where Samsung is the biggest advertising client. For newspapers, Samsung advertisements were dominant in *Chosun Ilbo*, *Joon-gAng Ilbo*, *Dong-A Ilbo*, *Maeil Economy Daily*, and *Hankook Economy Daily* between 2010 and 2014. *Hankyoreh*, *Kyungbyang Shinmun*, and *Hankook Ilbo* did not consistently rely on a single advertiser, unlike *Maeil Economy Daily*, which relied mostly on Samsung for its advertising revenue.

The Newspaper Code of Ethics, adopted by the Korean Association of Newspapers, Korea News Editors' Association, and Journalists Association of Korea, specifies independence from social and economic powers as one of the fundamental responsibilities of journalists (Korea Press Ethics Commission, 2009). However, responses from the *Korean Journalists Survey 2019* reflect the pressure journalists work under in companies with different revenue and ownership structures. Overall, advertisers (68.4%) were most frequently selected as one of the three biggest factors restricting freedom of the press, followed by executive editorial officers (52.7%). But the journalists from the three major broadcasters (KBS, MBC, and SBS) selected the executive editorial officers as the biggest obstacle to freedom of the press (57%), followed by government and political influence (54.2%), with advertisers fifth on the list (29.6%) (Korea Press Foundation, 2019c). This reflects the influence of government and government-affiliated commissions in legacy television news media, especially in the form of subsidies and government advertisement contracts. On the other hand, respondents from the economic dailies (90%), national general dailies (77.1%), and online newspapers (74.6%) felt the pressure from the advertisers to be the greatest.

(F7) Procedures on news selection and news processing 2 POINTS

Rules and routines, albeit informal, do exist and there are abundant debates in newsrooms.

There do not exist any formal rulebooks, and instead, informal rules dominate. Items are selected by reporters every week, which then have to go through editorial meetings with senior desk staff, but selections made by reporters are rarely overturned.

Reporting on topics being debated on social media is currently a hot topic. Some outlets have developed informal rules on how to report on social media topics, especially regarding politicians and public figures.

(F8) Rules and practices on internal gender equality 2 POINTS

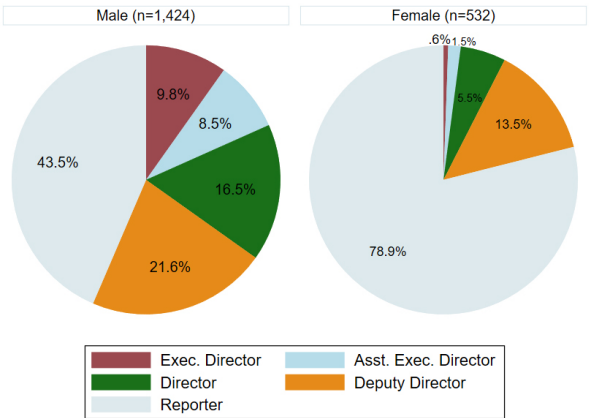
Inequalities still remain. An unequal cultural milieu and poor daycare support are partly to blame for the remaining inequalities, especially in relation to the promotion of female journalists.

Gender equality and women's rights in the workplace have been often overlooked issues in South Korea. Gender inequality and glass ceilings are not unique to the media industry, and the *2018 Global Gender Gap Report* from the World Economic Forum (WEF) ranked South Korea 115th out of 149 countries in gender equality (World Economic Forum, 2018). Out of the four factors measured by the WEF index, economic participation and political empowerment stand out as areas of weakness in comparison with educational attainment and health and survival. Placed 92nd for political empowerment and 124th for economic participation and opportunity, South Korea has fewer female lawmakers or high-level public officials and a wider wage gap than other countries, which is also reflected in the media industry. Such a social milieu is closely linked to the opportunity windows for female reporters to be assigned to major positions, which is inevitably linked to career advancement. This becomes not a matter of competence, but an issue of lacking social networks crucial for sourcing stories.

According to the *Korean Journalists Survey 2017*, 71.6 per cent of the journalists in the news industry were male (21,940) and 28.4 per cent were female (8,707) in 2016 (Korea Press Foundation, 2017). Since then, female journalists have grown in number, reaching 31.5 per cent (9,872) in 2018, but the gender gap persists. Gender gaps are even more evident in high-ranking positions. 78.9 per cent of female respondents and 43.5 per cent of male respondents are rank-and-file reporters, and 92.5 per cent of female respondents hold positions that are deputy-level or below. This far exceeds the 65.2 per cent of the male

respondents who hold positions at or below deputy level. However, the ratio reverses in higher rank positions: 34.8 per cent of male respondents hold positions above the director level, while only 7.5 per cent of the female respondents do (see Figure 2).

Figure 2 Positions held by gender



Source: Korea Press Foundation, 2019c: 53

Although published almost a decade ago, the *Global Report on the Status of Women in the News Media* (International Women’s Media Foundation, 2011) offers insights into South Korean women’s work environment in the media industry that are still very much relevant today. South Korean women are, as in many other areas, pursuing journalism more actively than before, and the report depicts an increasingly open work environment for women. The study reports fairly equal full-time employment with benefits for both sexes, where there is little to no gender difference in lower-range salaries. Many news media have more female reporters at the entry-level. In 2018, the salary gap is as present as ever, with some exceptions in rare cases where women hold high-rank positions. The global report’s findings are also consistent with the more current *Korean Journalists Survey 2019*, in that more men hold higher-rank positions than women (see Table 1). In 2018, there are still virtually no women in top-level management, suggesting that women have little say in what gets reported and on what terms (Korea Press Foundation, 2018).

Table 1 Gender ratio by position

	Executive director	Assistant executive director	Director	Deputy director	Reporter
Ratio of female journalists	3 (2.1%)	8 (6.2%)	29 (11.0%)	72 (18.9%)	420 (40.4%)
Ratio of male journalists	140 (97.9%)	121 (93.8%)	235 (89.0%)	308 (81.1%)	620 (59.6%)
Total (n = 1,956)	143	129	264	380	1,040

Source: Korea Press Foundation, 2019c

According to the 2018 article from the Journalist Association of Korea, some print newspapers do not have any female directors in their newsrooms, despite a substantial number of female journalists (Kim, 2018). Among the major newspapers, *Kyunghyang* and *Hankyoreh* have the highest overall ratio of female reporters. Out of the 259 journalists working for *Kyunghyang*, 85 (32.8%) are women, and 5 out of 25 deputy director-level positions and above are held by women. 93 out of *Hankyoreh*'s 275 reporters are women, which makes up more than a third of their entire workforce. 14 out of 60 executive officials above the deputy director-level positions are women. *JoongAng Ilbo* is the only national daily with a female editor-in-chief.

While there is much room for improvement in gender equality and representation in the newspaper industry, the broadcasting industry has even thicker glass ceilings that have kept women from reaching the executive director positions in all of the three major terrestrial broadcasters. KBS has only two female directors, a mere 9.5 per cent of the 21 management-level employees, which means that fewer women get to participate in the decision-making process in news production meetings. MBC and SBS are not very different in their gender makeup, despite a slight increase in the number of women in deputy director- and director-level positions in recent years.

The marital status of respondents from the *Korean Journalists Survey 2019* is also reflective of the working environment of women in the news industry (Korea Press Foundation, 2019c). In 2018, 71.3 per cent of male journalists were married, but only 31.4 per cent of the female journalists were, and the number of female journalists drops even further (21.2%) when asked if they have children (Korea Press Foundation, 2018). Such a pattern can be explained by the social pressure put on women to leave their job for marriage and family. The difference in the average age of male (42.6 years) and female (33.4 years) respondents is reflective of women's relatively recent entry into economic participation.

The Child Care Act (Article 14) dictates that any business with at least 300 full-time female workers or at least 500 full-time workers establish, joint-

operate, or contract a workplace childcare centre. Given that approximately 400 to 500 employees work part- or full-time for each of the major national dailies, childcare is not always guaranteed. Larger broadcasters like the major terrestrial broadcasters do provide childcare to meet this mandatory requirement.

The nationwide #metoo movement in 2018 sparked changes in the news media, giving rise to specialised departments like a gender equality centre, committee for gender equality, and gender desk in media companies to promote gender sensitivity and identify and resolve gender-related issues internally. KBS first adopted gender equality rules in 2019, expanding its previous guidelines for sexual harassment at the workplace to include measures for equal treatment of both sexes as well as disciplinary measures for sexual misconduct. SBS and MBC, along with other major news media, revised their disciplinary code for sexual harassment and assault to better accommodate victims and impose stricter discipline on their perpetrators. These efforts, albeit overdue, are expected to foster gender-sensitive work environments and systematically improve women's working conditions, while also changing stereotypical and discriminatory coverage of women in media.

In the news industry, the Korea Woman Journalists Association has advocated for the rights of women in the media industry and promoted gender equality since 1978 through research, training, publication, networking, and study-abroad opportunities for female journalists. Organisations like the Korea Women's Associations United and other government agencies dedicated to promoting women's rights also offer commentaries and research on gender equality in news coverage and media content.

(F9) Gender equality in media content

1 POINT

Leading news media are only just beginning to be more inclusive in content construction in factors such as source distribution and selection of columnists. The current lack of diversity can be attributed partly to the overall social state, as South Korea has immense gaps in gender equality in the professional sphere and social status.

The news industry in South Korea has come a long way in the past few decades in terms of gender inclusivity in the workforce. Guidelines on providing balanced, fair coverage regardless of gender, age, or ethnicity are also widely accepted and are included in the various codes of ethics adopted by different news media.

The Korea Press Ethics Commission is a self-regulatory organisation established by the Korea Press Association, Korea News Editors' Association, and Journalists Association of Korea in 1961. It has put forth Newspaper Ethics Guidelines that ban discriminatory and stereotypical depiction of any regional,

socioeconomic, gender, or religious minority. The Internet Newspaper Code of Ethics is another self-regulatory code overseen by the Internet Newspaper Committee (2019) that outlines guidelines for fair coverage. The Journalists Association of Korea also guards against discrimination and stereotyping in news coverage in its Rules on Human Rights Reporting.

(F10) Misinformation and digital platforms
(alias social media)

2 POINTS

There are special rules and checks for reporting something from social media or the Internet, especially when quoting someone based on social media posts.

The annual report on journalists' reporting and working conditions showed that many news media have fact-checking systems in place. In 2019, only 4.3 per cent answered that there is absolutely no rule against misinformation in place, while 73.3 per cent answered that at least some systematic measure is being taken. More than half of these respondents answered that an adequate or excellent fact-checking system is in place (37.3%).

The interviewees said that in practice, they rarely use online-only material for reporting, and even if they do, they double-check with official sources. Classes are held on this in the Korea Press Foundation, and reporters are encouraged to participate, with management often excusing reporters who want this education from their daily duties. Data scientists and programmers are beginning to enter newsroom as special staff.

(F11) Protection of journalists against (online) harassment 2 POINTS

Cyberstalking is a huge problem in South Korea. Most firms protect their employees and try to prevent traumatic experiences, especially for less-experienced journalists.

Cyberstalking has emerged as a big problem in South Korea. Violent comments – sometimes with personal threats – are prevalent in the polarised political environment. Journalists' work e-mails are disclosed on the articles they author, and some receive e-mails with profanities for no evident reason. No specific law is in place to protect journalists from these comments or e-mails. Libel laws apply to online comments, and they are currently the only legal protection journalists have.

Interviews show that firms provide therapy and other medical costs. However, what is more dangerous in terms of harassment is not harassment itself, but self-censorship due to repeated incidents.

Dimension: Equality / Interest Mediation (E)

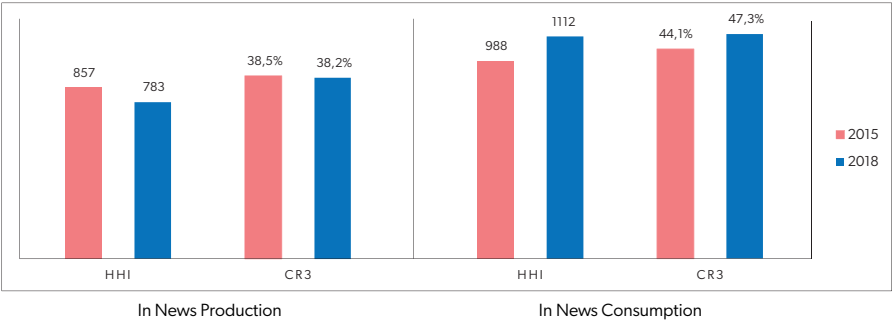
(E1) Media ownership concentration national level 2 POINTS

A higher concentration ratio (CR3) is observed when the news media market share is calculated based on news consumption (47.3%) rather than production (38.2%).

Some level of plurality of ownership is observed at a national level. Some believe that the government is rather heavy-handed with subsidies and regulations affecting management, and the government-owned news outlet is still fairly influential. Still, the news industry has a free market. Ownership and major shareholders are disclosed in annual business reports, which are available online on the public data analysis and retrieval terminal. However, some of the less visible familial and business ties may not always be apparent for someone unfamiliar with the economic geography of South Korea.

The concentration ratio differs based on how the news media market share is calculated. When news producers are considered, the CR3 is 38.2 per cent in 2018, a slight decrease from 38.5 per cent in 2015. When news consumption is used to calculate the concentration ratio, CR3 reaches 47.3 per cent, a jump from 44.1 per cent in 2015 (see Figure 3).

Figure 3 Concentration ratio by category



Source: Public Opinion Concentration Survey Committee, 2018

(E2) Media ownership concentration regional (local) level 1 POINT

The ownership concentration at the regional level largely matches the national level, although there may be some regional preferences for specific news outlets.

The relatively small size of the country means that news media is centralised. News outlets available around the country are fairly uniform. All leading news media have their main offices located in the metropolitan area in or near Seoul, and local newspapers have far smaller market shares even within local communities. As much as keeping track of regional market shares of local newspapers is helpful to understand varying levels of plurality of media ownership in each region, the centralised news media structure renders such distinctions quite meaningless.

(E3) Diversity of news formats 2 POINTS

The popularity of smartphones to access news while on the move has contributed to the emergence of “card news” as a convenient, visualised news format. New and innovative formats of news presentation have started to take off, especially geared towards younger audiences who are used to the fast-paced and eclectic news available on social media platforms.

A wide range of media is used to access news. The shift to news consumption on mobile devices has also affected the way news is organised and presented. While the more traditional news formats of straight news, features, and editorials in newspapers are still published, “card news” – or news presented in a series of “cards” – are also popular in South Korea. Card news presents information a piece at a time so that the reader can digest the news as they flip through cards on mobile devices.

From the news-making side, journalists from print and online newspapers, as well as those from news agencies, write straight news the most, writing up to 10.6 articles a week. Feature reports amount to 2.1 articles a week, with editorials or commentary amounting to a mere 0.4 articles. An average of 9.7 online articles were written per week per journalist.

In news broadcasts, it is typical for an evening news programme to cover numerous news items in a straight format rather than provide an in-depth report or commentary. Each news programme includes two to three in-depth issues reported by different reporters. In rare occasions of live coverage or feature reporting, the news announcer engages with the reporters to present information in greater detail. Other news programmes, like investigative pieces, dedicate extended time to track and report a single issue.

(E4) Minority/Alternative media

0 POINTS

Minority and alternative media are extremely scarce, and news media specialising in investigative journalism are still very small in comparison with legacy media. However, the rise of Internet news has given these news outlets greater reach.

Major news media companies still serve as the dominant source of news, but the rise in Internet news media companies has encouraged the growth of a few alternate media outlets.

An example of alternate news media is the Korea Center for Investigative Journalism (also known as *Newstapa* in Korean), established in 2012 with funding from the Union of Media Workers as an online independent news media outlet specialising in investigative journalism. *Ohmy News* is another alternate online media outlet, where much of the news stories are sourced by the public and written by citizen reporters.

Still, there's a general dearth of news media companies that represent minority groups in South Korea. *The Women's News* is the only news outlet that focuses on gender issues and women's rights. Since the first issue of a weekly periodical in 1988, *The Women's News* now offers both a print newspaper and an online news website. *BeMinor* and *Ablenews* are alternative news outlets whose missions are to advocate for the rights of people with disabilities and to promote social inclusion. As Internet news outlets, these two are relatively new.

(E5) Affordable public and private news media

3 POINTS

Accessing news is relatively easy in South Korea, with news articles and television news programmes provided free of charge online most of the time. Various forms of news are accessible as long as one has a personal computer or a smartphone. Channel reception fees, cable, and smartphone plans are generally affordable.

The wide availability of both ethernet and wireless Internet offers easy access to online news at little or no cost. Online news articles are free of charge on both Internet portals and newspaper websites, and most television news programmes are also streamed free of charge on broadcaster websites and YouTube. Since much of online news content is consumed on mobile devices, phone bill expenses are an important factor to consider. 67 per cent of people spend between KRW 30,000–60,000 on average on their smartphone plans.

Monthly subscriptions for print general dailies cost about KRW 20,000 and are tax-deductible. The monthly reception fee for KBS television channels amounts to KRW 2,500, which can, should one choose to, be waived. Cable, satellite, and IPTV subscriptions vary across different package plans from different telecommunication companies, but range from about KRW 12,000–40,000

and are offered as package plans with mobile plans for smartphone use, often offered at a lower cost. These expenses should be contextualised against the average monthly income of KRW 2,970,000 in 2018.

(E6) Content monitoring instruments

1 POINT

Public and civic monitoring bodies provide content monitoring regularly and offer easy public access to decisions and statistics online.

Content of the media outlets is regularly monitored by the public monitoring bodies. The Korea Press Ethics Commission permanently monitors news content and deliberates on violations of the Newspaper Code of Ethics, issuing notices, private warnings, and public warnings for print and online articles and advertisements. The deliberations and decisions statistics are available to the public on their website. Likewise, the Korea Communications Standards Commission monitors broadcast content regularly, while also monitoring language used in broadcast programmes. Deliberations are made quarterly, and summary reports are posted online. The commission issues sanctions while also providing administrative guidance.

As for monitoring by non-profit organisations, Citizens' Coalition for Democratic Media provides content monitoring not only for newspaper and broadcast programmes, but also for YouTube. It also runs citizens' communications standards commissions and organises the Reporting of this Month award to incentivise responsible and fair news reporting. Despite these content monitoring instruments, however, the balance between male and female subjects in news content is relatively overlooked in comparison with other non-news media content.

(E7) Code of ethics at the national level

2 POINTS

Codes of ethics exist both at the national and the firm levels. Newsroom practice does not always match what is laid out on paper.

The Journalists Association of Korea has its code of ethics recognised at the national level. The items stipulated are freedom and independence of the press, fair and balanced reporting, journalists' integrity, fair and transparent information gathering, fair use of information, protection of privacy, protection of the source, prohibition of discriminatory or instigative reporting, and restriction of advertising and sales.

The Press Arbitration Commission serves as the press complaints commission that mediates between the party injured by news reporting and the news media

at no cost. It helps the aggrieved party to recover any damage by requesting correction of the original news report, a statement in reply to the report, a follow-up report, and compensation for the injury. Although these instruments are in place for ethical journalistic practices, they are not always observed, and oftentimes overlooked in practice.

(E8) Level of self-regulation

2 POINTS

Each news media outlet has its own mission statement, and most have codes of ethics or conduct. Readers' rights instruments and ombudspersons are present in many of the leading news media outlets but are not found very widely and often serve as customer service of sorts.

Most newspaper firms do have their own codes, guidebook, and internal committees. Per Broadcast Law, all television news providers must have a viewer committee to advise on content and programming. YTN, for one, runs an ombudsperson programme titled *YTN Citizens' Desk*, and Yonhap News TV also runs and broadcasts a weekly ombudsperson programme.

In 2019, 671 news media outlets (26.0%) had a readers' rights instrument out of the 2,584 surveyed, and 216 (40.1%) of print new media outlets had an ombudsperson (Korea Press Foundation, 2019d). The ombudsperson model in South Korea is very much informed by the American model, where newspapers commission an external expert to hold the ombudsperson position, but sometimes have a former journalist serve in the position and publish columns. Despite such practices, the ombudsperson programme is not very popular because individuals consisting of internal figures in the position often operate like customer service or are limited in their capacity to reflect reader criticisms in news media practice.

(E9) Participation

3 POINTS

Citizen participation is convenient and active. News outlets offer various online channels through which the public can comment, share user-generated content, and engage in public discussions.

One of the many advantages that South Koreans enjoy today is easy access to news and opinions online. Every major news outlet operates its own website, while also partnering with online portals like *Naver* and *Daum* to have them pool news articles to populate their news sections. Portals usually use the "in-link" method – which embeds the news outlet's article into the portal's template rather than redirecting the user via an external link to the news outlet's web page

– and operate their own comments section for these in-linked articles. Given that these platforms attract users with a wide range of political opinions and from different walks of life, the most heated online discussions occur on the comments sections of these online platforms. Comments for individual articles are open to the public on news outlets' websites, and readers' letters, online forums on general topics, and public online comments on news items are all available online. All leading news media also run story tip-off web pages and hotlines. Journalists' e-mail addresses are disclosed on the articles for reader feedback.

Most news outlets collect user-generated content via audience submission or on social media platforms like Twitter or YouTube. At least one piece of audience-generated content is covered on television news, either as a subject of extensive reporting or as a form of audience commentary. News channels like YTN distribute applications and operate tip-off numbers, where first-hand video recordings can be sent to the hotline.

(E10) Rules and practices on internal pluralism

2 POINTS

Codes of ethics and guidelines mandate the inclusion of different relevant viewpoints, and some level of internal pluralism is observed in the newsroom. However, there is no methodical system in place to ensure the reflection of various voices.

The code of ethics and practice guidelines laid out by the Korea Press Ethics Commission and those adopted by the leading news media outlets explicitly state journalists' responsibility to reflect the opposing voice when presenting an article that is critical of an individual or organisation, and to maintain impartiality in reporting. The guidelines also guarantee readers' right of reply and right to demand correction to ensure balanced and fair reporting that embraces different voices.

In terms of actual practice of internal plurality, interviewees suggested that different views are often debated in the newsroom. However, the degree of plurality can be very arbitrary, especially in this polarised news media environment. In theory, they seek plurality, but in reality, they have to rely on available sources.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog “control of the controllers”

3 POINTS

There exists ample media outlets and people who scrutinise journalists’ behaviour, although the majority of the time it is one-note criticism by the other side of the political spectrum. But the general audience has exposure to both sides, which has the negative side-effect of increasing cynicism.

The press serves the crucial role of watching over political and economic powers to defend democracy. In South Korea, the news media’s ties with authoritarian regimes in the past, its function as a pseudo-government agency, and the size and influence of media over public opinion have given it the nickname “the fourth body of government”. Although the ties – both overt and subtle – between the press and the government have become weaker since, there is still a need for watchdogs of the press.

On an official level, public commissions and agencies watch over news media. The Korea Communications Commission, Korea Press Ethics Commission, Internet Newspaper Committee, and Press Arbitration Commission are the major institutions that watch for violation of human rights in news, regulations, and other media laws, keeping the press under both the direct and indirect influence of the government.

Non-profit organisations acting as media watchdogs, independent and self-governing entities that regularly monitor and evaluate news media, are also prominent players in the media in South Korea. However, some non-profit organisations take partisan positions, which further aggravates polarisation and promotes distrust in news media. Most of the media watchdogs in South Korea emerged out of citizen movements, whether it be consumer activism, monitoring, or media reform movements (Chung, 2017). The Citizens’ Coalition for Democratic Media is an independent organisation founded in 1984. It was conceived by journalists and reporters fired from the press during the authoritarian regime, persecuted by both the administration and the news media owners (Citizens’ Coalition for Democratic Media, n.d.). Citizens’ Coalition for Democratic Media sets the agenda for media reform and independent press while also monitoring the press and offering policy suggestions. The Korea Press Consumerism Organisation is a non-governmental organisation famous for its boycott campaign against the three major conservative newspapers: *the Chosun Ilbo*, *JoongAng Ilbo*, and *Dong-A Ilbo*. While Korea Press Consumerism Organisation focuses on consumer activism for media reform, grassroots organisations like Cultural Action and WomenLink monitor issue commentaries and engage in public access movements or host public discussions as watchdog

organisations. WomenLink focuses on gender issues and women's rights in media content. These organisations also form different coalitions, like the People's Coalition for Media Reform, to join forces for specific issues of interest.

The National Union of Media Workers also plays a role in watching the media. Founded in 2000 as an industry union serving the legacy of the Korean Federation of Press Unions, the union serves media workers by advocating for fair pay and better working conditions. A part of its mission is also to support media reform by promoting self-regulation among journalists and advocating for independent editorial and programming. The National Union of Media Workers has 14,512 members and 72 chapters around the country. Since its first publication as the union newspaper in 1989, the Media Union Newspaper provides articles and commentary on ownership structures, media policies, and media reform.

Media Today is a periodical which specialises in reporting on media coverage. Originally published by journalists and editors as a weekly periodical on news coverage, *Media Today* now also offers an online news site updated daily with articles and commentaries on the South Korean press in addition to its weekly print publication. Legacy news outlets also air feature television documentaries and report coverage on journalistic practices and various issues in the news media industry, albeit infrequently.

While there are plenty of personal blogs that offer analyses and personal insights into the state of South Korean press, no single blog stands out as either the most influential voice in the blogosphere or as an expert media watchdog blog.

(C2) Independence of the news media from powerholders 1 POINT

Although it may look like a free press on the surface, leading South Korean news media are not completely free from the influence of government and conglomerates.

News media's close relationship with politics and business in South Korea puts the press under the heavy influence of external powerholders. Although there is no explicit statement of support for a specific political party, most of the major news media are known to be either right- or left-wing, and on the rare occasion also centrist.

While some news outlets' ownership structures are more diverse than others, most of the major newspapers and broadcasters are predominantly owned by one or two private owners, media conglomerates, or non-media companies. In 2015, a total of 16 news outlets' largest shareholders were corporations. KBS is owned by the government of South Korea, but others, like *the Chosun Ilbo* or *JoongAng Ilbo*, are predominantly owned by a single owner or owners

from the same family. The personal ties between some of the media owners and non-media *chaebol* owners are considered especially troubling, because these affiliations are not readily noticed, yet can critically impair the independence of the press. Integration of ownership and management has also been a controversial issue in many of the news media companies and a point of struggle between the media union and management.

Journalists in South Korea are also exposed to various forms of external pressure. Although the code of conduct from the Journalists Association of Korea (2014) lists protection of the source as one of the journalists' responsibilities, without a shield law to protect the journalists who refuse to disclose their source, journalists are often asked to cooperate with the police in a criminal investigation and identify their sources. The absence of a shield law and other relevant articles means that journalists may, unless actively harbouring a fugitive or assisting in a felon's escape, legally refuse to disclose the personal information of the sources. Still, the law obligates journalists to testify should they be summoned to court and leaves them vulnerable to external pressure to disclose their source, since journalists' refusal to testify is not protected by law.

(C3) Transparency of data on leading news media 3 POINTS

Most of the information is available in accessible formats.

Information about the leading news media is easy to access and readily available online. Leading news media publish the ownership and contact information in their impressum for print, broadcast, and online media.

Ownership structures, key business figures, and management performance reports are published in the annual business report of the major news media and reported to the Financial Supervisory Service. The report is mandatory, based on the size of the media outlet, and thus required of most leading news media. The report is also available online via Korea Press Foundation as well as the public Data Analysis and Retrieval System, and a summary of key figures for each leading news media – if available through the Financial Supervisory Service – is presented in the annual Korea Press report by the Korea Press Foundation. Quarterly business reports are also publicly accessible and include a summary of finances, capital changes, auditor's report, and shareholder information.

(C4) Journalism professionalism

2 POINTS

The infrastructure, such as professional organisation, solidarity, opportunities for training, values of investigative journalism, and so forth, is in place. Whether these are fully utilised in the intended way is another question.

With the newspaper business declining, the professional ethos of journalists seems to be strong in South Korea. One needs strong conviction to keep with the profession, especially when the financial reward is not as strong as before and social esteem for the profession is not as strong either. Reporters' communicative efficacy in the newsroom is solid, and when editorial or journalistic rights are infringed upon by external or internal factors, they often show solidarity across firms as a professional group. Union activities are also strong.

Organisations such as the Korea Press Foundation provides a fair amount of quality education and professional forums for journalists to network and learn new skills, such as data science and visualisation. The foundation is also active in publishing professional texts or reports. Prominent reports from global organisations such as Reuters Institute are often quickly translated into Korean.

Though cynicism towards the news media is prevalent in South Korea, public debate on journalism is ample. Although being controversial in its political stance, public broadcaster KBS has regular hour-long programmes on journalism critiques.

(C5) Journalists' job security

2 POINTS

Longer term contracts are still the norm. But new hires under the same terms are declining.

While the constitution ensures the freedom of the press, no specific legal provisions are in place for internal democracy, or for the protection of individual journalists when in conflict with the management. While the general level of job satisfaction improved in comparison with the 2017 survey, the average job satisfaction score in 2019 was still 2.85 out of 5. Job stability was third on the list of work environment factors respondents were satisfied with, with the score of 2.91 (out of 5), following work autonomy and promotion opportunities. 32.6 per cent of respondents were generally dissatisfied by the work stability, while only 28.5 per cent were generally satisfied. 84.6 per cent of journalists in the news industry worked full-time, and 15.4 per cent worked under contract in 2018. In comparison with the previous year, this is a 0.3 per cent decrease in the number of full-time journalists and a 17.5 per cent decrease in the number of contracted journalists. While full-time employment is predominant and sug-

gests relative job stability, we can expect some gap between the statistical data and reality based on the history of unexplained firings.

There is no formal action taken to support women and promote gender equality in hiring non-permanent positions. However, in recent years, many news media have adopted gender equality rules and guidelines for sexual harassment at the workplace and refurbished rules for equal treatment of both sexes as well as disciplinary measures for sexual misconduct.

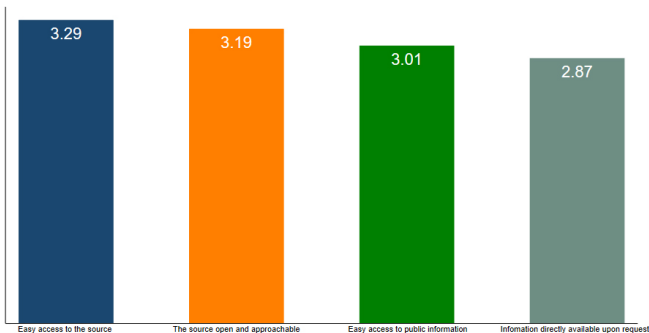
(C6) Practice of access to information3 POINTS

Public information is fully open upon request.

There is an information access law which requires all public information to be made available when requested. Moreover, the *Korean Journalists Survey 2019* shows that journalists enjoy a fairly high level of freedom in the reporting process in South Korea. In the 5-point scale to rate the reporting environment, easy access to information was rated 3.01, and provision of information upon request was rated 2.87 (see Figure 4).

Although legal provisions do not guarantee rights to request and access information, the scope of available information has drastically increased and may explain the relative satisfaction with the reporting environment. The ease of access via online databases and government data portals may also explain the ease of access to information.

Figure 4 Journalists' evaluation of the reporting environment



Source: Reprinted from the *Korean Journalists Survey 2019* (Korea Press Foundation, 2019c)

(C7) The watchdog and the news media's mission statement

2 POINTS

Mission statements exist, but a lack of resources prevents the prioritisation of such missions over routine news production.

Some major news media have mission statements containing the watchdog role, and it is fair to say that even for others, there is a widespread understanding of this role. But there is a constant lack of time to invest in investigative journalism.

There is a generational gap between millennials and their superiors. Younger journalists have stronger motivation and preference for conducting investigative journalism. A focus group interview in 2019 showed that younger journalists have a stronger demand for basic training on investigative journalism and advanced skills, partly due to the decline of the apprenticeship system in the newsroom and lack of opportunities for novice journalists to learn from their veteran colleagues. More experienced journalists, however, find the younger generation to be more resistant to their advice and consultation, suggesting that the generational gap may affect the quality of news reporting in the long run.

(C8) Professional training

3 POINTS

High-quality training opportunities are available within South Korea and even abroad. It is not easy for reporters to carve out time for such education, but managers do make efforts to provide opportunities to whoever wants them.

Continuous and ample training opportunities are provided by the Korea Press Foundation and those who seek to participate in trainings are usually given the chance to do so. The *Korean Journalists Survey 2019* showed that the opportunity to develop expertise was the fourth most satisfactory factor in the journalists' job, with an average score of 2.85 (out of five). 26.9 per cent of the respondents were satisfied by these opportunities, a jump from 18.5 per cent in 2017 (Korea Press Foundation, 2017, 2019c).

There's a consensus that the professional training programmes journalists participated in were generally useful. When asked to score the usefulness of the training programmes they completed, the journalists rated study abroad or graduate programmes abroad to be the most useful at 4.50, and rated Korea press foundation training at 4.17. Internal training offered at the workplace were rated as the least useful among different types of training programmes (3.60) but still proved to be fairly useful. There's a general demand for training in digital journalism and Big Data analysis, which suggests that the training programmes currently offered have scope to improve.

(C9) Watchdog function and financial resources

1 POINT

There is a consensus that increasing investigative journalism is the way forward, but this has not been realised in practice. Some media have only now started to have a separate division to deal with investigations.

Some leading news media explicitly stipulate financial support for investigative journalism in their codes of ethics, but most do not. The need to increase investigative journalism is certainly accepted, but there is still a long way to go to actually making investments. Overall industry cutback on overseas networks has also decreased the number of already scarce foreign correspondents. Interviewees said that foreign correspondents are shrinking and are no longer very active.

Independent online news services, such as *Newstapa*, are gaining a reputation as investigative reporting-focused services. *Newstapa* runs on donations and subscriptions and does not accept any sponsorship of funds from the government or corporations to ensure its autonomy.

Conclusions

A polarised political environment, created through the impeachment of the former President by citizens' revolution and the current regime, which again is criticised for not being inclusive of all the political voices within the society, is the biggest threat to healthy working journalism in South Korea. Leading news media outlets are divided among the large political parties and select and frame news according to their alignment. Thus, the media is not a watchdog but a political player.

There exists good public infrastructure that acknowledges the role of journalism for healthy democracy through bodies such as the National Journalists Association and the Korea Press Foundation which conduct research and training for journalists. Leading news media outlets are eager to learn digital tools such as data science and visualisation. However, declining revenue has curbed such aspirations and desires to venture into investigative journalism. With leading news media still under the influence of external powers, young journalists exert more effort in defying the legacy to build up a new model of journalism.

South Korea is a country of advanced telecommunication infrastructure, industry, and culture. News start-ups are rising and experiments are taking place which have started to affect how journalism is conducted by leading firms. In conclusion, the current state of journalism is not so satisfactory, but the future is not that gloomy either.

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