

# PROJECT POLDERS . MEDIA

INTERNATIONAL BENCHMARK · 2026 — EXECUTIVE EDITION

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## Where the Dutch media landscape stands

*An international benchmark of news and journalism, 2026 — prepared following Media voor Democratie 2026 (Stichting Democratie en Media, 5 June 2026), benchmarking the Netherlands against eight comparator markets and the global average.*

NL Netherlands · Norway · Sweden · Denmark · Finland · Germany · United Kingdom · France · United States

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PREPARED  
July 2026

PRIMARY SOURCES  
Reuters Institute DNR 2026 · RSF  
Index 2026 · CvdlM

SCOPE  
9 markets + global average

## ABOUT THIS EDITION

This executive edition condenses the full *International Benchmark 2026 · V4* for print hand out and board-level reading. It preserves every published figure and every benchmark verdict of the full report; the underlying analysis, complete dashboard and country detail are available in the online edition.

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## OCCASION

Prepared following *Media voor Democratie 2026*, the sector-wide working conference convened by Stichting Democratie en Media on 5 June 2026, at which some 130 editors-in-chief, publishers, board chairs, regulators, senior civil servants, academics and journalists examined the future of the Dutch media landscape.

## PRIMARY SOURCES

Reuters Institute *Digital News Report 2026* (48 markets, ~97,000 respondents; Netherlands n = 2,022, with the Commissariaat voor de Media) · RSF *World Press Freedom Index 2026* · Reuters Institute *Journalism, Media and Technology Trends and Predictions 2026* · SDM conference report “*De toekomst wordt gebouwd door ons.*”

## DATA DISCIPLINE

Only published figures are used; open cells are left open rather than estimated. No figures in this report are invented or extrapolated. Year-on-year changes of  $\leq 2\text{pp}$  are treated as within survey noise.

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# ES WHERE THE NETHERLANDS STANDS

## Executive summary

By almost every structural measure, the Netherlands enters 2026 as one of the strongest news environments in the world.

### #2

#### PRESS FREEDOM

Second of 180 countries on the RSF Index; only Norway ranks higher.

### 49%

#### TRUST IN NEWS

Twelve points above the global average of 37% — itself at its lowest since 2015.

### 34%

#### NEWS AVOIDANCE

Well below the global 42%; TV news still leads or matches online video.

The Netherlands is one of only three markets worldwide — with Germany and Denmark — where television news still leads or matches online video. Beneath that strong surface, however, three fault lines are visible. **Monetisation is mid-tier:** 15% pay for online news, down two points, against 40% in Norway and 32% in Sweden. **Engagement is softening:** the share with little or no interest in news has grown from 4% to 14% since 2018, and outright distrust has roughly doubled, from 11% to 21%. And **platform dependence is advancing:** more than a million Dutch adults now get news only from social media — platforms whose news only 12% of the Dutch say they trust.

The picture that emerges is of a landscape that is **high-trust, high-freedom, undermonetised, and quietly eroding at the edges.** The comparators show both directions of travel: Norway and Finland demonstrate that trust and willingness to pay can be held at far higher levels; the UK and the US show how quickly a high-trust environment can be lost once erosion compounds.

Inside newsrooms, meanwhile, AI has become routine infrastructure — with returns that industry leaders themselves rate as evenly “promising” (44%) and “limited” (42%) — while AI answer engines squeeze publisher traffic from upstream.

This edition therefore treats the benchmark not only as a measure of journalism, but as a first map of the wider **information environment**: the interaction between publishers, public media, platforms, creators, AI interfaces, recommendation systems and citizens. The decisive question is shifting from whether people can access news to whether they encounter enough verified, original and sufficiently diverse perspectives to make sense of society together.

The conclusion of *Media voor Democratie 2026* — that we are living through a short, malleable period in which the future is built rather than predicted — is supported by this data. So are the six working-session insights: **all six are confirmed** by the international evidence, several in sharpened form (Section 05). The Dutch position is strong but not self-sustaining, and the levers that distinguish the leaders from the laggards are identifiable and actionable.

*The Dutch landscape is high-trust, high-freedom, under-monetised — and quietly eroding at the edges. Both futures visible in the comparator set remain open.*

#### DEFEND

World-class press freedom, above-average trust, strong direct access and legacy reach.

#### CLOSE

The reader-revenue gap: 15% paying versus 40% in Norway — the largest structural distance to the peer group.

#### MONITOR

Avoidance trajectory, AI intermediation, and trust measured brand-by-brand versus system-wide.

## 01 OCCASION & PURPOSE

# Why this benchmark, why now

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On 5 June 2026, some 130 editors-in-chief, publishers, board chairs, regulators, senior civil servants, academics and journalists — the Dutch media sector, public and private, in one room — spent a day at *Media voor Democratie 2026* examining the future of the Dutch media landscape. The event’s organising insight was that the sector is living through a short, malleable window of large changes, made more urgent by AI-driven fragmentation. Its keynote, Oxford philosopher Carissa Véliz, framed the stakes:

*“The future is not predicted. The future is built, by us.”*

CARISSA VÉLIZ · MEDIA VOOR DEMOCRATIE 2026

Building requires knowing where you stand. This report takes the six insights that surfaced in the event’s working sessions — audience relationships, AI demystification, the journalist as guide, the affordability of quality journalism, the ambiguity of “trust”, and the economics of attention — and tests each against the best available international evidence. The core sources are the Reuters Institute *Digital News Report 2026* (published 16 June 2026, eleven days after the event) and the RSF *World Press Freedom Index 2026*, supplemented by the Dutch country study produced with the Commissariaat voor de Media.

The comparator set is deliberate: the **Nordics** (Norway, Sweden, Denmark, Finland) as the high-trust, high-payment frontier the Netherlands is often grouped with; **Germany** as the closest large-market structural sibling; the **UK and France** as large European markets under visible strain; and the **US** as the fragmentation extreme. Together they mark out the corridor of plausible Dutch futures.

## 02 HOW TO READ THE FIGURES

# Method and sources

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The *Digital News Report 2026* is based on online surveys of nearly 100,000 respondents across 48 markets, fielded in January–February 2026 with nationally representative quotas (Netherlands: n = 2,022, in partnership with the Commissariaat voor de Media). “Trust in news” is the share agreeing they can trust most news most of the time; “paying” is any payment for online news in the past year; “avoidance” is sometimes or often actively avoiding the news. The RSF index scores 180 countries on five expert-assessed indicators: political, legal, economic, sociocultural, and journalist safety.

### Four disciplines govern this report

**Published figures only.** Where a 2026 country figure was not separately published in the sources consulted, the cell is left open rather than estimated.

**Subjective measures named as such.** Survey-based trust measures are aggregates of respondent opinion, not objective assessments of trustworthiness — and “trust” itself is measured differently across instruments (Section 05).

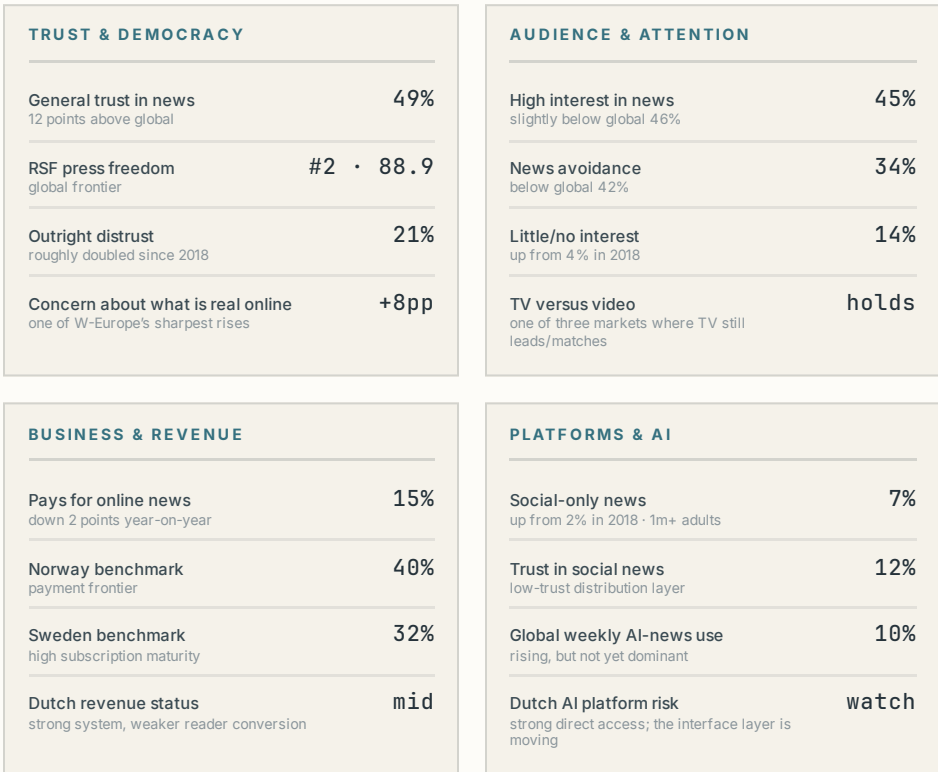
**Noise band respected.** Year-on-year changes of two percentage points or less are treated as noise, following the Reuters Institute’s own convention.

**Analytical humility.** The benchmark separates observed differences from explanations. Where the evidence suggests a strategic lever — for instance in reader-revenue conversion — it is stated as a hypothesis supported by comparison, not as proof of causality. The Dutch landscape is treated as a set of interacting sub-systems: public service media, national commercial publishers, regional titles, digital-native outlets, creators and platform environments.

# 03 NINE MARKETS · TWELVE SIGNALS

## The benchmark dashboard

The dashboard keeps the discipline of not inventing missing figures: verified values where available, benchmark signals where the international evidence supports comparison, and clear labels where the evidence remains open.



Two composite signals complete the twelve: the **publisher conversion gap** — Norway's paying share is roughly 2.7× the Dutch figure — and the overall **Dutch position**: high-trust and high-freedom, but under-monetised and vulnerable to edge erosion. Globally, social and video networks (54%) now exceed TV as widely used news sources.

NINE MARKETS, SIDE BY SIDE

The market table

| MARKET         | TRUST  | RSF        | PAYS     | AVOIDS   | RISK                                   | BENCHMARK READING             |
|----------------|--------|------------|----------|----------|--|-------------------------------|
| Netherlands    | 49%    | #2 · 88.9  | 15%      | 34%      | <span style="color: #c07040;">●</span> | strong, under-monetised       |
| Norway         | top 10 | #1 · 92.7  | 40%      | open     | <span style="color: #40a040;">●</span> | trust + payment frontier      |
| Sweden         | top 10 | #5 · 87.6  | 32%      | open     | <span style="color: #40a040;">●</span> | subscription maturity         |
| Denmark        | top 10 | #4 · 88.5  | 20%      | +7pp y/y | <span style="color: #40a040;">●</span> | high trust, weaker conversion |
| Finland        | 63%    | #6 · 86.2  | open     | open     | <span style="color: #40a040;">●</span> | European trust leader         |
| Germany        | ≈46%   | #14 · 82.2 | open     | open     | <span style="color: #808080;">●</span> | closest large-market sibling  |
| United Kingdom | 30%    | #18 · 79.5 | open     | 50%      | <span style="color: #c0392b;">●</span> | erosion warning case          |
| France         | open   | #25 · 76.7 | open     | open     | <span style="color: #c07040;">●</span> | large European stress case    |
| United States  | 25%    | #64 · 62.6 | -4pp y/y | 45%      | <span style="color: #800000;">●</span> | fragmentation extreme         |
| Global average | 37%    | –          | 17%      | 42%      | <span style="color: #c07040;">●</span> | baseline, not ambition        |

● Platform risk: low  
 ● contained  
 ● watch  
 ● strained  
 ● high  
 ● extreme

**DUTCH STRENGTH**

World-class press freedom, above-average trust and lower-than-average avoidance. That is the core asset.

**DUTCH WEAKNESS**

Reader revenue is the outlier: at 15%, far from Norway and Sweden, and below the tracked-market average.

**DUTCH WATCHPOINT**

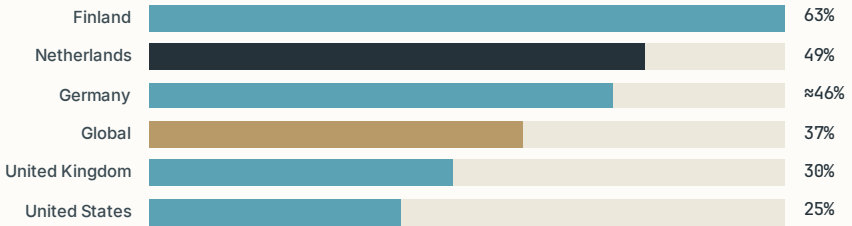
The weak signals are not collapse but compounding: lower interest, more social-only news, growing doubt about what is real online.

Method note: the dashboard does not invent missing country numbers. It separates published values from benchmark signals; open cells remain open.

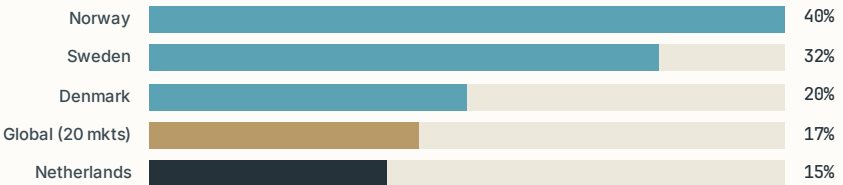
VERIFIED FIGURES, 2026

### Three measures that frame the Dutch position

**TRUST IN NEWS**



**PAYING FOR ONLINE NEWS**



**NEWS AVOIDANCE (SOMETIMES / OFTEN)**



Source: Reuters Institute Digital News Report 2026 · verified published figures only. Bars scaled to the highest value in each measure.

## 04 THREE ASYMMETRIES

# Reading the scoreboard: the Dutch triple position

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### Freedom is world-class; monetisation is not

On press freedom the Netherlands is effectively at the frontier: second of 180, ahead of every comparator except Norway, and rising one place year-on-year while press freedom globally hit a 25-year low. But the economic base underneath that freedom looks very different. At 15% paying for online news — and falling — the Netherlands sits **below the global average of 17%** and at less than half the Nordic frontier. Denmark shows this is not simply a matter of audience appetite: Danish and Norwegian publics report similar levels of high interest in news, yet Norwegian publishers convert twice the share of the population into payers. The comparison suggests that conversion is not solely a cultural constant; strategy appears to play an important role.

### The platform paradox

Globally, 2026 was the year social media and video networks overtook every other channel as the most widely used source of news (54%, ahead of TV at 52% and news sites and apps at 51%). The Netherlands is one of only three markets where legacy channels still hold the line on video — yet the drift is unmistakable at the margins: the share of Dutch adults getting news *only* from social media has grown from 2% in 2018 to 7% in 2026, more than a million people. The paradox, as the Commissariaat voor de Media puts it, is that these platforms matter more and more for how people encounter news while only 12% of the Dutch say they trust the news found there. Concern about what is real online rose eight points in the Netherlands this year — one of the sharpest increases in Western Europe.

## Quiet erosion, not collapse

The headline Dutch numbers moved little this year: trust -1, avoidance +2, both within the noise band. The erosion shows in the longer series — and interest is where it shows first. Across all markets, high interest in news has fallen thirteen points since 2021 (59% → 46%); the Dutch figure now stands at 45%, having drifted below the Norwegian (≈49%) and Danish (≈48%) levels the Netherlands once matched.

At the other end of the distribution, the Dutch share with little or no interest in news has more than tripled since 2018 (4% → 14%); the share who distrust the news outright has roughly doubled (11% → 21%); and reports of intimidation and violence against journalists have risen for a third consecutive year. None of these is a crisis in isolation.

The UK series shows what they become in combination: interest there has fallen further than in any major market tracked since 2015, trust has dropped twenty points in a decade — from 50% in 2016 to 30% in 2026 — and avoidance now covers half the population.

*The UK of 2016 looked, on these measures, rather like the Netherlands of today.*

**4→14%**

LITTLE/NO INTEREST

More than tripled in the Netherlands since 2018.

**11→21%**

OUTRIGHT DISTRUST

Roughly doubled over the same period.

**-20pp**

UK TRUST, 2016-26

The steepest G7 decline: what compounding erosion becomes.

## 05 MEDIA VOOR DEMOCRATIE · WORKING SESSIONS

# The six insights, benchmarked — all six confirmed

Each working-session insight from the 5 June event — as recorded in Stichting Democratie en Media's review of the day — is stated, then tested against the international data. The pattern is striking: the sector's intuitions are not only confirmed — all six hold, and in several cases the data sharpens them.

### I · 1 The future belongs to whoever holds the relationship with the public

✓ CONFIRMED

The global data makes this the central story of 2026. TV news and publishers' own websites and apps have fallen 13 and 12 points respectively since 2020, while the share naming social media and video networks as their *main* source rose from 22% to 30%. Among 18–24-year-olds, more than half (52%) name platforms and AI chatbots as their primary route to news. The Netherlands still holds a comparatively strong direct relationship — and is acting on it: the joint letter of 23 media organisations to the informateur, GPT-NL trained on 30+ Dutch news archives, and youth strategies from NOS Stories (1.3m TikTok followers) to Mediahuis's SPILNEWS and DPG's free subscriptions for 16–25-year-olds.

#### BENCHMARK VERDICT

Confirmed and urgent. The Dutch direct relationship is above-average but the global current runs the other way; the defensive window the session described is real and measurable.

## 52%

18–24s · PRIMARY ROUTE

Name platforms and AI chatbots as their main way to news.

## 22→30%

SOCIAL AS MAIN SOURCE

Share naming social/video networks as main source, since 2020.

## -13pp

TV NEWS SINCE 2020

Publishers' own sites and apps fell 12 points over the same period.

## I·2 We must demystify AI

✓ CONFIRMED

Weekly use of AI chatbots for news rose from 7% to 10% globally — growing, but hardly the unstoppable train of the headlines, and flat over the past year in the US, UK, France and Germany. Trust in AI chatbot answers is just 20% globally, far below even record-low trust in news (37%); in the UK it is 6%, the lowest of any market. Dutch usage (~7% of adults, 13% among the young) is below the global average. Notably, only 42% of chatbot news users globally often or always click through to sources — so where AI intermediation does grow, the traffic largely does not come back.

### BENCHMARK VERDICT

Confirmed. AI-as-news is neither negligible nor inevitable; the window to shape norms (GPT-NL, provenance, attribution) is open — exactly the “few years to build a good example” the session named.

## I·3 The journalist as guide

✓ CONFIRMED

Overload is real: interest in news has fallen 13 points across markets since 2021, casual or passive users have risen from 16% to 25%, and 62% globally worry about what is real and fake online. But the guide role has an economic proof point: the markets where audiences most value orientation, context and selection — Norway, Sweden, Finland — are also the markets where they pay most for it. Per the CvdM’s 2026 analysis, Dutch trust is higher where factual news is recognisably separated from opinion, and where independence from owners and politicians is visible.

### BENCHMARK VERDICT

Confirmed, with a sharpening: the guide role is monetisable, but only where the guidance itself is demonstrably transparent and independent.

## I·4 Who can still afford quality journalism?

✓ CONFIRMED

Those who pay for news are more engaged, less avoidant and more digitally literate than the average. The aggregate reader-revenue market is no longer expanding (17% across tracked markets, flat), so growth for one outlet increasingly comes from another's subscribers. If AI becomes the mass free tier while quality journalism becomes a paid option, the two-speed information society the session feared follows mechanically. Dutch mitigations are in the field — DPG's 5,000 free regional subscriptions and free digital subscriptions for students aged 16–25 — but at 15% paying and falling, the structural exposure is larger than in any Nordic comparator.

### BENCHMARK VERDICT

Confirmed as the Netherlands' largest structural gap versus the peer group it aspires to. The Norway–Denmark contrast shows the gap is closable by strategy, not just culture.

## I·5 Stop talking about “trust” — or define it precisely

✓ CONFIRMED

In the same year, Edelman reports 58% of the Dutch trusting media “to do what is right” while the DNR reports 49% trusting “most news most of the time” — different questions, different answers, same word. The DNR 2026 makes the layering explicit: trust in individual widely-used brands is holding up much better than trust in “the news” overall. What is eroding is confidence in the information *environment* — 70% globally believe owners exert undue influence on news, 70% say the same of politicians — not necessarily in named newsrooms. The trust problem is partly an attribution and measurement problem.

### BENCHMARK VERDICT

Confirmed and consequential. “Trust” without a definition is unmeasurable and therefore unmanageable; the brand/system split is the definition the data itself suggests.

## I·6 The attention social media monetises is not the attention news media needs

✓ CONFIRMED

The dependence the session described is quantified in 2026: news organisations increasingly need platforms for reach (77% of people worldwide watch online news video weekly, overwhelmingly on third-party platforms), while the platforms' ranking logic remains opaque. The chilling effect is documented in the Dutch market itself: Mediahuis's youth brand SPILNEWS publicly raised TikTok's opaque moderation and shadow-banning — visibility limits imposed without notice, transparency or appeal — as running counter to the European Media Freedom Act. Meanwhile 27% globally got news from news-focused creators in the past week; the most-followed Dutch news account, Cestmoco (1.2m Instagram followers), is run anonymously. Creator attention, however, is complementary rather than substitutive — only 3% globally rely on creators for all their news.

### BENCHMARK VERDICT

Confirmed. The reach/attention trade is structurally unequal, and its terms (opacity, shadow-banning) are now a regulatory question — the EMFA gives the Dutch sector standing that most markets lack.

I·1 – I·6

SIX INSIGHTS TESTED

6 / 6

CONFIRMED BY THE DATA

3

SHARPENED IN THE  
PROCESS

## 06

## THE PRODUCTION SIDE

AI in the newsroom

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Insight I-2 covered AI on the consumption side — chatbots as a route to news. The production side moves faster. The Reuters Institute’s companion survey of **280 senior news executives across 51 countries** (*Journalism, Media and Technology Trends and Predictions 2026*, with the Netherlands and Benelux among the best-represented markets) gives the international baseline against which Dutch newsroom practice can be read.

**Adoption is broad; returns are not**

AI is now routine newsroom infrastructure — for news gathering, drafting, summarisation, metadata and workflow automation. But the leaders’ own scoring is strikingly even: **44% call their AI initiatives “promising”, 42% call the results “limited”**. Two-thirds (67%) report no job savings from AI efficiencies; 16% have slightly reduced staff, while 9% have added roles and cost. The honest reading is neither transformation nor failure: wide adoption, thin and uneven returns — so far. Fewer than four in ten leaders (38%) are optimistic about journalism’s prospects as a whole, even as a majority (53%) remain confident about their own organisation.

**The real pressure is upstream: answer engines**

The sharpest AI effect on newsrooms in 2026 is not internal tooling but distribution. Google search referrals to publishers have already fallen by roughly a third (Discover -21%), driven by AI Overviews answering questions on the results page, and publishers forecast around a further 40% decline in search traffic within three years. Referrals from ChatGPT are growing fast but remain, in the Reuters Institute’s words, little more than a rounding error — Google search alone delivers around 500 times as many. Only 20% of publishers expect AI content-licensing deals to bring significant revenue within three years.

## The strategic response: distinctiveness

The survey documents a coherent industry pivot away from what machines reproduce cheaply: planned investment in **original investigations (net +91%)** and **contextual analysis (net +82%)**, with generic news commodity output being cut (net -38%); 79% prioritising video and 71% audio. Provenance infrastructure lags badly — fewer than 1% of news images and videos currently carry C2PA content-provenance metadata — which matters, because in an environment of AI slop the ability to show where content came from and how it was edited becomes a competitive asset, not a compliance cost.

## Where the Netherlands stands

Dutch newsroom practice mirrors the international pattern but with an unusually **collective and sovereign character**. GPT-NL — over 30 news brands pooling archives to train a Dutch LLM built on copyright protection and fair compensation — is precisely the “good example” the Media voor Democratie session called for, and the reciprocity counter-design to the answer-engine problem. NPO’s Ezra Eeman has framed the required shift memorably: from thinking about “AI in Media” to “Media in AI”.

The full production spectrum is visible in the Dutch market: Mediahuis is trialling AI agents that fully produce first-line breaking news with human review only of the final output — structurally similar to UK regional publisher Newsquest’s 30+ “AI-assisted reporters” — while DPG titles experiment across functions and regional daily Tubantia uses AI suggestions for simpler, less negative language to counter avoidance. The governance stakes are equally visible: a former NRC editor-in-chief was suspended by Mediahuis after publishing AI-fabricated quotes in his newsletter. That incident, uncomfortable as it was, demonstrates the asset: an accountability line that is enforced.

*In a landscape where trust erodes at the system level, enforced editorial accountability around AI — visible, auditable, and measured — is one of the few trust signals machines cannot counterfeit.*

## 07 COUNTRY LESSONS

# What each comparator teaches

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### Norway — the ceiling

RSF #1 (10th consecutive year) · 40% pay for online news

Proof that a small, high-trust language market can sustain the world's highest willingness to pay: decades of bundling, household subscriptions and local-title loyalty converted into a durable reader-revenue base — with news interest comparable to Denmark's, but twice the payer share.

**LESSON FOR NL** — The payment gap appears partly to be a conversion problem, and conversion problems have at least some publisher-side solutions.

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### Finland — the trust anchor

Trust 63%, Europe's highest · RSF #6

The strongest direct-access culture in the survey: Finns disproportionately go straight to news sites and apps, prefer text over video, and watch news video more on publishers' own properties than on social platforms. Direct habits and top-of-Europe trust reinforce each other.

**LESSON FOR NL** — Defending direct access is defending trust; the two are the same asset.

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### Denmark — the warning next door

RSF #4 · pay 20% · avoidance +7pp in one year

Structurally the most Netherlands-like Nordic: high trust, strong public broadcaster, TV still leading video — and a payer share closer to the Dutch 15% than to Norway's 40%. In 2026 it posted one of the world's largest one-year jumps in news avoidance.

**LESSON FOR NL** — Avoidance can jump, not just drift. Watch the Dutch 34% closely.

## Germany — stability, at a price

Trust ≈46% (one of only five markets rising) · RSF #14

The closest large-market sibling: TV still leads online video, trust ticked up while falling almost everywhere else, and AI chatbot news use is flat. But even here, social media as a main news source rose four points in a year — the platform current runs under stable markets too.

**LESSON FOR NL** — Legacy strength buys time; it does not stop the underlying shift.

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## United Kingdom — erosion compounded

Trust 30% (-5; -20pp since 2016) · avoidance 50% · RSF #18

A decade ago the UK looked like the Netherlands does now. Since 2016 trust has fallen twenty points — the steepest G7 decline — avoidance has reached half the population, immigration coverage scores a net satisfaction of -37, and trust in AI news answers (6%) is the world's lowest. Interest remained; the relationship broke.

**LESSON FOR NL** — Trust is lost story-domain by story-domain (immigration, climate), not all at once.

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## United States — the stress test

Trust 25% (7th lowest of 48) · RSF #64 (-7 places)

What full politicisation of the information environment looks like: trust at 25% overall and just 15% among the political right — near the lowest for any political segment in any market — payment falling, avoidance at 45%, and press freedom now ranked below sixty countries. France (RSF #25, public media viewed net-negatively) sits partway down the same slope.

**LESSON FOR NL** — Once trust polarises along political identity, no editorial strategy recovers it quickly.

## 08 POSITION SUMMARY

# The Dutch scorecard

The scorecard translates the benchmark into board language: four strengths to defend, four vulnerabilities to close, three watch items to monitor.

### STRENGTHS — DEFEND

|                            |   |
|----------------------------|---|
| <b>Press freedom</b>       | RSF #2 of 180 (88.9), up one place in a year when global press freedom hit a 25-year low. The institutional foundation every other advantage rests on.  |
| <b>Trust premium</b>       | 49% vs 37% global; NOS, ANP, RTL Nieuws and regional titles retain high brand-level trust. “We have something to lose that we have to protect” (CvdM chair Amma Asante).  |
| <b>Legacy reach</b>        | One of only three markets worldwide where TV news still leads or matches online video; direct routes to news remain comparatively strong.   |
| <b>Sector coordination</b> | The joint letter of 23 organisations to the informateur, GPT-NL (30+ brands pooling archives), and a merger regime that attached plurality conditions to DPG-RTL. Few markets can act collectively at this level. |

## #2 • 88.9

RSF INDEX 2026

Up one place while global press freedom hit a 25-year low.

## 49%

TRUST IN NEWS

Anchored by high brand-level trust in NOS, ANP and RTL Nieuws.

## 23

ORGANISATIONS

Signed the joint sector letter to the informateur.

## VULNERABILITIES — CLOSE

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|                          |  |
|--------------------------|--|
| <b>Payment gap</b>       | 15% and falling — below the global average, less than half the Nordic frontier. The single largest structural distance between the Netherlands and the group it benchmarks itself against.   |
| <b>Disengaged margin</b> | No/low interest tripled since 2018 (4% → 14%); outright distrust doubled (11% → 21%); 1m+ adults social-media-only. Each cohort is hard to win back once formed.   |
| <b>Concentration</b>     | The DPG-RTL acquisition further consolidates an already highly concentrated market. Conditions (NU.nl and RTL Nieuws free and separate, independent foundations) mitigate but do not remove the plurality exposure — and 70% of audiences globally already believe owners exert undue influence on news. |
| <b>Journalist safety</b> | Intimidation, threats and violence up for a third consecutive year, alongside normalised political attacks on outlets. The RSF safety sub-indicator (#33) is already the weakest element of the Dutch #2 position.   |

## WATCH ITEMS — MONITOR

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|                              |  |
|------------------------------|--|
| <b>Avoidance trajectory</b>  | 34% (+2) is comfortable versus the global 42% — but Denmark just demonstrated a +7pp single-year jump from a similar starting position.  |
| <b>AI intermediation</b>     | Dutch chatbot news use (~7%; 13% among the young) is below the global 10%, but most users do not visit sources — every point of growth is largely lost traffic. GPT-NL's reciprocity model is the counter-design to watch. |
| <b>Definition discipline</b> | Track brand-level trust and system-level trust as separate series, per insight I·5. A single “trust” number will keep producing false alarms and false comfort.  |

## 09 THE ANALYTICAL SHIFT

# From journalism benchmark to information-environment benchmark

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Journalism can no longer be benchmarked in isolation. Citizens increasingly meet news through interfaces that select, rank, summarise or answer before a publisher brand is even visible. The health of the Dutch system therefore depends on the quality of the information environment around journalism: search, social recommendation, creator ecosystems, AI answer engines and public institutions.

### **AI changes production, discovery and decision-making**

In production AI automates research, drafting, metadata and workflow. In discovery it changes how people find information. In decision-making it shapes which sources are visible and which links disappear behind an answer. The governance question is not whether newsrooms use AI, but whether AI-mediated systems preserve human agency, attribution, pluralism and contestability.

### **Concentration strengthens capacity and narrows risk**

Larger groups can invest in technology, subscriptions, video, compliance and AI infrastructure at a scale smaller titles cannot match — yet concentration can narrow editorial diversity and increase agenda-setting power. The Dutch question is under which transparency, governance and plurality conditions scale strengthens the public sphere rather than merely the balance sheet.

### **Trust should be decomposed**

The benchmark should distinguish institutional trust, brand-level trust, source credibility, procedural transparency and epistemic confidence. Named brands may remain trusted while confidence in the surrounding system erodes; measuring only the first produces false comfort.

### **Perspective diversity is the missing democratic indicator**

The next generation of benchmarking should ask what range of perspectives people encounter: how much original reporting enters the system, how often titles converge on the same frame, which voices are absent, and whether AI increases or reduces exposure to competing explanations.

### **The Dutch polder question**

The Netherlands depends on institutions that turn difference into workable agreement — requiring shared facts, visible disagreement and cross-group understanding. The benchmark should ask whether the media system still supports that polder function, or whether platform fragmentation is turning public conversation into parallel realities.

## 10 BUILDING, WITH INSTRUMENTS

# Implications

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**For editorial leaders**, the benchmark reframes the trust question. Because erosion concentrates at the system level while brand trust holds, the highest-leverage move is making editorial construction visible: recognisable separation of fact from opinion, demonstrable independence, and — following the UK's domain-by-domain losses — knowing precisely on which story domains an outlet's coverage diverges from its peers, before audiences conclude it for themselves.

**For publishers**, the Norway–Denmark contrast is the operative fact: comparable audiences, double the conversion. The Dutch 15% should not be treated as a fixed ceiling. But the Nordic model monetises orientation and guidance, and guidance is only saleable while it is demonstrably trustworthy — which loops back to the editorial point.

**For policymakers and institutions**, the RSF safety sub-score, the platform-transparency questions raised under the EMFA, and the plurality conditions attached to DPG–RTL all point the same way: the Dutch #2 position is maintained by active institutional work, not inherited. The brandbrief's call for an integrated media and technology policy is, on this evidence, correctly aimed.

Underlying all three is a **measurement gap**. The sector's own conclusion from 5 June — stop using “trust” loosely, know where the relationship with the public actually stands — requires instruments that operate *between* the annual survey snapshots: structured, continuous measurement of how the same stories are framed across outlets, what is emphasised and what is omitted, where divergence is widening, and whether citizens encounter enough original reporting, source diversity, verification, correction, context and explanation. That is the layer at which the Netherlands' strong position will be either defended or lost — and it is the layer this benchmark is built to keep observable.

## PROJECT POLDERS.MEDIA

### NEWS INTELLIGENCE FOR THE INFORMATION ECOSYSTEM

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We look at News Intelligence: how the news sector can use AI more responsibly and effectively, while helping the public reconnect through a clearer understanding of the broader information ecosystem.

For a briefing, collaboration or board-level discussion: [gvp@polders.news](mailto:gvp@polders.news) · <https://polders.media>

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#### SOURCES

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Survey-based trust figures are aggregates of respondent opinion, not objective assessments of trustworthiness. Open cells were not separately published in the sources consulted; no figures in this report are invented or extrapolated. Changes of ≤2pp are treated as within survey noise. This report is an independent analysis by Project Polders.Media and is not affiliated with or endorsed by the Reuters Institute, RSF, the CvdM, or Stichting Democratie en Media. · © 2026 Polders.Media B.V., Amsterdam