

Audience Landscape and Media Security Studies in Brazil and Colombia: A Summary of Research Conducted and the Key Findings

Background

These studies were commissioned by Thomson Media as part of the AGILE (Advancing Global Innovation and Learning Effectively) project, a global media development initiative co-funded by the European Union and delivered by a consortium led by Internews Europe, with partners including Thomson Media, ARTICLE 19, Fojo Media Institute, and CFI Media Development.

The research was commissioned by Thomson Media to generate evidence on the sustainability, audience dynamics, and operating environments of independent media, and to inform more effective approaches to strengthening their resilience and financial viability.

The research comprised two complementary studies: an audience landscape assessment in Brazil and a security and risk assessment in Colombia. Together, these studies aimed to provide a grounded understanding of both the internal capacities of independent media organisations and the external pressures shaping their ability to operate, with a particular focus on identifying barriers to sustainability and opportunities for innovation and income generation.

The studies were conducted by Thomson Media (Thomson Foundation), working with commissioned research partners: Brazilian Association of Investigative Journalism (Brazil, media security study), Rede de Jornalistas Negros pela Diversidade na Comunicação (Brazil, audience landscape study), Un Mirador (Colombia, audience landscape study), and Laura Carolina Avile Cortes & Angie Viviana Yanguma Ayala (Colombia, media security study).

Methods

The research comprised four separate country-level studies, audience landscape and security/risk analyses in both Brazil and Colombia, each conducted independently but following a broadly comparable mixed-methods design. All four

studies combined secondary data analysis with primary qualitative research, tailored to the specific focus of each exercise.

The audience studies in both countries adopted a two-stage approach, beginning with structured desk reviews of national and international literature on media ecosystems, sustainability, and audience behaviour, followed by qualitative interviews with key stakeholders. In Brazil, the audience study drew on a wide range of documentary sources and included seven in-depth interviews with media leaders and researchers, with findings synthesised through triangulation and an evidence matrix. In Colombia, the audience study applied a more structured sequential design, reviewing 150 documents (of which 47 were analysed in detail) and conducting eight in-depth interviews with media directors and ecosystem experts to inform analysis of sustainability models, audience dynamics, and technological change.

The two security and risk studies also combined desk-based analysis with qualitative inputs, though with different emphases. The Colombia security study was based on a targeted literature review of national and international sources, including civil society organisations, international agencies, government institutions, and media reports, complemented by 12 semi-structured interviews with journalists, press freedom experts, and public officials. In contrast, the Brazil security study relied primarily on secondary data analysis, drawing on a systematically compiled dataset of incidents of violence against journalists collected by Abrajil between 2019 and 2024, alongside national and international reference sources. This dataset was cleaned, standardised, and analysed to identify patterns and construct a risk matrix based on probability and impact, without conducting primary interviews.

Across the four studies, findings were developed through triangulation of multiple data sources, combining documentary evidence, stakeholder perspectives, and, in the case of Brazil's security study, structured quantitative datasets. While the approaches were broadly consistent in design, there were variations in depth and emphasis across countries, particularly in the volume of secondary data reviewed and the number of interviews conducted. In several cases, the reports provide limited detail on sampling strategies and analytical frameworks, meaning that while the studies offer robust indicative insights, they are not intended to be statistically representative or fully generalisable.

Key Findings

The studies highlight a structurally fragile and financially constrained independent media sector in both Brazil and Colombia, with sustainability emerging as the central challenge. Many outlets operate with limited and unstable income streams, relying heavily on project-based funding or external support. In Colombia, 63% of digital-native outlets are not financially self-sustaining, while in Brazil, 60% of organisations report annual revenues below approximately USD 92,600, and more than a quarter report no revenue at all. This financial precarity restricts the ability of organisations to invest in growth, innovation, and long-term planning, reinforcing a cycle of dependency and short-termism.

“when billions of dollars disappear from the world of international cooperation... the media are left in the lurch,” José Guarnizo, director of Vorágine

A key finding across both contexts is the limited development of diversified and sustainable revenue models. While some outlets are experimenting with income streams such as grants, donations, and content services, these remain underdeveloped and often insufficient. There is a clear gap in business strategy, financial management, and audience monetisation, with many organisations lacking the skills and structures needed to translate audience reach into income.

“the ease of opening a digital media outlet... means that management, audience relations, and business model development take a back seat,” Sergio Ludtke of Projeto Comprova

These challenges are compounded by capacity constraints and limited access to expertise and support. Many outlets operate with small teams and limited technical or business capacity, which restricts their ability to adopt new tools, improve workflows, or test new approaches.

“we’ve had paid consulting work, but normally it’s very expensive... so things improve through trial and error,” Lina Álvarez of El Cuarto Mosquetero

Contextual pressures further exacerbate these challenges. In Colombia, media organisations operate in a high-risk environment characterised by physical threats, violence, and intimidation, which directly affect editorial independence and operational continuity. In Brazil, while physical risks are generally lower, there is evidence of legal and judicial pressures, including harassment and strategic litigation, which create uncertainty and additional costs for independent outlets. In both contexts, these pressures contribute to constrained operating environments and limit the ability of organisations to invest in long-term sustainability.



Finally, the studies underscore the impact of external funding volatility and broader ecosystem dynamics, including platform dominance, fragmented audiences, and increasing competition for limited resources. Together, these factors create a challenging environment in which independent media must operate, reinforcing the need for more sustainable funding models, stronger organisational capacity, and more coordinated, system-level approaches to support.

Conclusions and Implications

Taken together, the findings point to a sector that is highly resilient but structurally under-supported, with clear and interconnected needs. Addressing these challenges will require moving beyond short-term, project-based interventions towards more sustainable and systemic approaches, including:

- strengthening diversified revenue models and financial sustainability
- building business, management, and data capabilities within media organisations
- enabling innovation and more effective audience engagement strategies
- addressing security risks and enabling environments, particularly in high-risk contexts

More broadly, the research highlights the importance of coordinated, system-level solutions that reduce fragmentation and enable independent media to operate more sustainably in increasingly complex and constrained environments.

Sources

Audience Landscape Study and Security Assessments in Brazil and Colombia available in Spanish and Portuguese upon request [here](#).