

Transformations, Challenges, and Strengths of the Journalism Ecosystem: Media Mapping in Chile

Transformaciones, desafíos y fortalezas del ecosistema periodístico: catastro de medios en Chile¹



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Abstract:

This study examines the structure of the media system in Chile amid recent transformations, using a media mapping (2019-2020) with data from the Worlds of Journalism Study (WJS, 2021-2024). The results show an increase in media diversity, driven by the growth of regional and digital outlets. However, significant structural inequalities remain: for example, the Metropolitan Region accounts for 58.4% of sector employment, reflecting strong geographic concentration. Similarly, media conglomerates, which make up only 17.5% of outlets, account for 44.4% of journalistic employment, underscoring their weight in the sector. The study also notes changes in the professional profile of journalists: female representation has decreased from 43.2% to 32.2%, workforce has aged, with the average rising from 33 to 41.1 years, and there has been an increase in professional specialization,

Resumen:

Este estudio analiza la estructura del sistema de medios en Chile en el contexto de transformaciones recientes, a partir de un catastro de medios (2019-2020) y con datos del proyecto Worlds of Journalism Study (WJS, 2021-2023). Los resultados muestran un crecimiento en la diversidad mediática impulsado por la expansión de medios regionales y digitales. No obstante, persisten desigualdades estructurales significativas: por ejemplo, la Región Metropolitana agrupa al 58,4% del empleo en el rubro, lo que refleja una marcada concentración geográfica. Asimismo, los conglomerados mediáticos, que representan solo el 17,5%, concentran el 44,4% del empleo periodístico, lo que da cuenta de su peso en el sector. El estudio también identifica cambios en el perfil profesional de los periodistas: la representación femenina ha disminuido de 43,2% a 32,2%, hay un envejecimiento de la fuerza laboral –con un aumento de

reaching 91.5% of journalists. Overall, the analysis concludes that, although Chile has historically been identified as a country with high media concentration, recent changes indicate a shift toward greater diversity in the information ecosystem.

Keywords:

Mapping, media, Chile, journalism, journalists.

la edad promedio de 33 a 41,1 años- y ha habido un incremento en la especialización profesional, que alcanza al 91,5% de los periodistas. El análisis concluye que, aunque Chile ha sido históricamente identificado como un país con una alta concentración mediática, los recientes cambios muestran una evolución hacia una mayor diversidad en el ecosistema informativo.

Palabras clave:

Catastros, medios de comunicación, Chile, periodismo, periodistas.

1. Introduction

In recent years, we have been both witnesses to and participants in the crisis facing the journalism profession, both in Chile and worldwide. Information chaos, lack of trust, job insecurity, and technological threats are among the challenges confronting those within the media system (García Ramírez et al., 2025).

The findings for Chile in the report *The Media for Democracy Monitor* (Núñez-Mussa, 2021) show how the social unrest of late 2019 brought the role of the press and news production processes into public discourse. The press itself reported long working hours, high stress, limited opportunities for specialization, and low wages. Additionally, there are gender gaps and minimal consideration of internal pluralism in newsrooms. During this pivotal moment, protesters and members of the academic community criticized the coverage of the protests, leading to institutional scrutiny of journalistic practices and the media's ownership structure in the country.

Criticism of the news media's role, along with narratives highlighting the precarious nature of journalism, converge in a latent tension between audiences and journalists –a phenomenon reflected in studies such as *The Digital News Report* coordinated by the Reuters Institute at the University of Oxford, where local data reveal a trend of low public trust in news from traditional media outlets. Since 2019, this trust has remained below 50%, and data from 2022 confirm the trend at 38% (Fernández & Núñez-Mussa, 2022).

To address these threats, it has become essential to understand how the media ecosystem is structured and the conditions shaping relationships among its participants. Addressing these issues requires understanding the contexts of news production and distribution in Chile. This includes knowing how many news outlets operate in the country, their nationwide distribution, the diversity of platforms through which they are accessible to the public, and the number and distribution of journalists.

Therefore, the objective of this study is to examine the distribution of media in Chile, including the platforms through which they are accessible, the geographic and demographic distribution of journalists, and the relationship with media ownership structures. To this end, a mapping was conducted during 2019–2020 to map the main characteristics of the media in the country, providing an empirical basis expected to contribute to the analysis of potential transformations and strengths of the national media ecosystem.

2. Theoretical framework

2.1. *Studies on the media in Chile*

Research on journalism in Chile has approached the phenomenon from multiple perspectives. One well-established line of research examines the content produced by the media, focusing on how they construct specific topics, actors, or issues in their reporting. These studies have provided evidence to understand, for example, the configuration of media agendas, predominant news frames, and the professional roles that guide journalistic practice (Mellado et al., 2018; Saldaña et al., 2025; Valderrama et al., 2025; Etchegaray & Matus, 2015; Cabalin Quejada & Lagos Lira, 2010; Flores-Aguilar et al., 2025; Lagos et al., 2022).

Another line of research has focused on the relationship between journalism and its audiences, exploring how the latter assess journalistic performance and understand its social functions (Puente & Mujica, 2006; Humeres et al., 2023; Gajardo & Mellado, 2024, among others). In addition, research drawing on the tradition of the sociology of journalism has focused on the internal workings of newsrooms and the specific conditions under which news production takes place (Stange et al., 2018; Dodds, 2019, 2022). The field of journalism education has also been examined, addressing the expectations, identities, and professional representations of journalism students (Mellado & Scherman, 2017; Avendaño et al., 2021; Lazcano-Peña et al., 2021; Bustamante-Pavez et al., 2024).

In recent years, research has focused specifically on practicing journalists, aiming to analyze structural transformations in the field within a context marked by two consecutive crises that redefined its production conditions: the 2019 social unrest and the COVID-19 pandemic. For journalism, the social unrest required prolonged coverage of a highly contentious protest cycle, characterized by violence in public spaces, disinformation, distrust of the media, and increased physical and psychological risks for journalists, who had to work in hostile environments while facing challenges to their legitimacy. The pandemic then brought a long-lasting health crisis that demanded constant news coverage under restricted mobility, reorganization of newsroom work, and greater reliance on institutional sources, deepening changes in routines, work organization, and the relationship with audiences (González-Trujillo et al., 2022; Grassau et al., 2023; Porath et al., 2025, among others).

In this context, recent research has examined how these transformations appear in professional routines, organizational models, business models, and journalists' career trajectories. For example, Greene et al. (2022) analyzed the evolution of editorial planning routines in ten digital media outlets through in-depth interviews with editors and directors, revealing a distinction between traditional and digital-native media in work organization and editorial decision-making. Jara Reyes et al. (2023) examined six digital-native media outlets to understand changes in the Chilean news system, identifying tensions across five business model dimensions: sustainability, innovation, collaboration, community building, and journalistic added value.

Lazcano-Peña et al. (2024) show, based on interviews with entrepreneurial journalists, that this career path often results from contextual conditions rather than deliberate vocational choices, revealing processes of forced reconversion rather than planned professional development strategies. Similarly, Gajardo and Mellado (2024), after conducting 30 interviews with journalists from national media outlets and audience members, identify a complex interaction between traditional professional values and shifting public expectations: while journalists emphasize objectivity and independence as normative pillars, audiences

prioritize closeness, empathy, and accessibility. Faure et al. (2025b), in examining six regional digital media outlets, conclude that the territorial dimension significantly influences economic sustainability, community development, and the construction of journalistic value.

Based on 91 in-depth interviews with journalists and editors from various Chilean media outlets, Grassau et al. (2023, 2024) analyze how the social unrest and the COVID-19 pandemic served as catalysts for transformations in newsroom dynamics and the conception of the professional role in contexts of high uncertainty. Their findings indicate that journalism underwent a process of professional *mourning*, marked by tensions, resistance, and subsequent adjustments to work routines and organizational structures. They also identify increased organizational pressures related to audience metrics and visibility imperatives, as well as the adoption of self-protection strategies in hostile environments.

Another line of research on journalism in Chile has focused on the challenges facing the profession based on the perceptions of practitioners (Puente et al., 2013). Unlike most of the previously mentioned studies, which relied primarily on interviews and content analysis, this body of work uses predominantly quantitative designs, particularly surveys. These studies have made it possible to systematically characterize professional identities, job expectations, and conceptions of the social role of journalism, as well as the criteria of truth and ethical frameworks that guide journalistic practice (see Mellado et al., 2010; Mellado & Lagos, 2011; Mellado & Humanes, 2012; Mellado & Van Dalen, 2014; Oller et al., 2017).

2.2. *The importance of knowing the numbers*

Journalism currently faces numerous challenges resulting from technological, economic, and social transformations that have reshaped the global media ecosystem (Hanitzsch et al., 2019). These challenges include ownership concentration, access gaps, job insecurity, and the proliferation of misinformation (Waisbord, 2022; Opdahl et al., 2023). To address these challenges, media mapping and analysis serve as tools that enable the examination of media distribution across geography, demographics, and platforms, and help to understand the dynamics within these ecosystems (Rodríguez-Urra et al., 2023). For example, analyzing ownership concentration can reveal how a few corporations or groups control most of the information consumed by the population, limiting the diversity of voices and perspectives (Trappel & Meier, 2022).

Mapping also facilitates the identification of the platforms through which media are accessible, as well as the technological gaps affecting different regions and demographic groups. According to Vassilakopoulou and Hustad (2023), such studies help detect inequalities in access to and availability of local information, which is critical for promoting an informed and participatory society. Finally, Rodríguez-Urra et al. (2023) argue that systematizing these data helps characterize the geographic and demographic presence of journalists, i.e., understanding where and how they work, as well as assessing inequities in both the workplace and news coverage.

Previous studies have demonstrated the potential of mapping to analyze media dynamics. For example, The Media Pluralism Monitor (MPM) project uses methodologies that combine quantitative and qualitative data to examine media pluralism in Europe and to detect risks related to media concentration, editorial independence, and the inclusion of minorities in news systems (Brogi, 2020). Similarly, in Latin America, the FOPEA Media Map of Argentina (Rodríguez-Urra et al., 2023) and the Alberto Hurtado University's Media Cartography of Chile have provided insights into the media landscape of those countries.

2.3. *Media context in Chile: a look at the numbers*

The media system in Chile shares characteristics with other Latin American countries (Mastrini & Becerra, 2011; Guerrero & Marquez-Ramirez, 2014; Hallin & Echeverría, 2024). It follows a commercial model based on private ownership, is funded primarily by advertising sales, is heavily centralized in the country's capital, and is economically concentrated. As a result, there are inequalities in access to information and increasing precariousness in journalistic work (Núñez-Mussa, 2021; Grassau et al., 2021). Although independent platforms have emerged and some technological advances have occurred, according to the National Television Council (Breull, 2015), the landscape remains dominated by a few conglomerates that control most broadcast channels. This centralizes information in the capital, leaves the regions underrepresented, and limits both the diversity of voices and the ability of local issues to reach a wider audience (Del Valle & Carreño, 2020).

Ownership concentration shapes the structure of the Chilean media ecosystem (Godoy, 2016; Mastrini et al., 2023). According to the Library of Congress report (2019) *Concentración de medios de comunicación* (Media Concentration), a portion of the national print media is controlled by two major conglomerates (Guerra, 2019): El Mercurio and Copesa. In the television sector, a similar pattern is observed with the dominance of certain channels. On broadcast television, 95% of the audience is concentrated on just four channels: TVN, MEGA, CHV, and Canal 13 (Consejo Nacional de Televisión [CNTV], 2025). In radio, according to the National Television Council (Breull, 2015), the media conglomerates Ibero Americana Radio Chile (Prisa Group, Spain), Grupo Dial (Copesa), Radios Andrónico Luksic, RBR Radios (Bezanilla Group), and Bío-Bío Comunicaciones (Mosciatti Family Group) dominate the sector.

This scenario is reinforced by the weakness of the public media system and the structural constraints that community media face in developing and self-financing (Godoy, 2016; Sáez & García, 2022; Sáez et al., 2022). Various studies also show little ideological or value-based diversity among major media owners and the largest advertisers (Mastrini et al., 2024; Mönckeberg, 2009). However, over the past decade, an ecosystem of native digital media has flourished, particularly in capital cities, though these outlets have yet to stabilize their business models or achieve editorial and financial sustainability (Faure et al., 2025a; Jara Reyes et al., 2023).

Advertising investment trends are exacerbating the structural imbalances in Chile's media ecosystem. Although total media investment grew by 3.5% in 2023, reaching 975.554 billion Chilean pesos, this increase was concentrated primarily in digital platforms and high-reach media, without significantly strengthening local media (Badal, 2024). Digital advertising, which accounted for 51.1% of total investment, absorbed resources that previously supported traditional media such as broadcast television and radio, both of which saw declines in their share, with a -2.4% change in investment during the first quarter of 2024 (Badal, 2024; Publimark, 2024).

This concentration of investment in national media and digital platforms has had varying effects at both national and regional levels. In national media, it reinforces dynamics of concentration, content standardization, and pressure on business models, resulting, for example, in the adoption of strategies such as implementing paywalls or reducing and, in some cases, eliminating the print format. At the regional level, however, it has limited the sustainability of local media, restricting their capacity for news production and deepening inequalities in the coverage of issues of public interest. Within this structure, new working

conditions and forms of journalism practice in Chile are taking shape and evolving, the nature of which is addressed in the following section.

2.4. Working conditions and journalism practice in Chile

The crisis in the business model is driving processes of reconfiguration in journalism practice, resulting in an ecosystem marked by job instability, fragmentation of the news landscape, and increasing technological mediation of professional practices (González-Trujillo et al., 2022; Grassau et al., 2023). This has led to newsroom consolidation, budget cuts, mass layoffs, and the outsourcing of services that traditionally operated within media outlets (such as cameramen, photographers, sound technicians, or archivists), as well as an intensification of journalists' multifunctionality, with these professionals now serving as reporters, web editors, community managers, and cameramen. Media outlets have also disappeared, particularly national and general-interest magazines, or, at best, have been scaled down and transitioned to digital formats.

These transformations are also evident in journalists' workplaces. While many journalists continue to work in traditional media, there has recently been an increase in professionals turning to social media and independent content creation, using platforms such as YouTube, blogs, or podcasts to reach audiences seeking more diverse information that aligns with their interests (Lazcano-Peña et al., 2024). These new types of journalists are redefining how information is produced and consumed. While they have greater independence in choosing topics, they also face challenges such as monetizing their content and competing in a saturated digital environment (Lazcano-Peña et al., 2024).

The unequal distribution of media resources is also reflected in journalists' working conditions. The second wave of the Worlds of Journalism Study (WJS2, 2012–2016), an international comparative study based on representative surveys of journalists in more than 60 countries, provides insight into these conditions. In Chile, as reported by Mellado et al. (2017), journalists worked primarily in national media (67.6%), followed by regional media (23%) and local media (1%). By type of media outlet, 35.2% worked in newspapers, 25.9% in television, 14.2% in radio, and 6.1% in digital-native media, with low representation in magazines (0.3%) and news agencies (2.2%). Regarding contractual status, 80.4% were full-time employees, 10% worked part-time, and 9.6% were freelancers. The average professional experience was 8.46 years, with a median age of 33, and 43.2% of the sample were women.

Significant gender inequalities persist in the distribution of roles across different sectors of the journalism industry in Chile. Despite increased participation by women in journalism, leadership positions remain predominantly held by men. According to Mensa et al. (2021), men made up 63% of staff compared to 37% women in the newsrooms analyzed. This imbalance not only affects professional development opportunities for women but also perpetuates biases in news coverage, limiting the power and visibility of women's voices both in the news and in the selection of sources (Hudson-Frías et al., 2022).

Overall, the reviewed studies show that working conditions and the practice of journalism in Chile face structural challenges that affect the stability, equity, and sustainability of journalistic work. However, studies offering a comprehensive national view of the media ecosystem's infrastructure remain scarce.

3. Methodology

This study examines the distribution of media outlets in Chile, considering the platforms they use, the geographic and demographic distribution of journalists, and the existing ownership structure. This work is part of two government-funded projects that enabled a two-phase mapping exercise², as well as the third wave of the international Worlds of Journalism Study (WJS) project (Lauerer et al., 2025), all guided by clearly defined inclusion criteria. First, all original editorial products whose primary objective is to provide news to an audience were considered, including television channels, newspapers, and radio stations. This criterion allowed the inclusion of media outlets of various types and sizes, from those with neighborhood and community reach to those with regional and national scope. The definition was deliberately broad, so non-traditional media, such as religious, citizen, or municipal outlets, were also included if they were relevant to a specific segment of the population.

Data collection was conducted by journalism students under the supervision of the research team. Each student was assigned an administrative region of the country to identify the media outlets present, and the data was then verified through a cross-checking process. In cases of uncertainty regarding the inclusion of a media outlet, an inclusive approach was taken, incorporating the outlet in question into the database.

Data was collected between September 2021 and December 2022 from various public sources, including lists of media outlets that submitted rate cards to the National Electoral Service for the most recent election within the study period, databases from the Chilean Association of Broadcasters (ARCHI, by its Spanish acronym), and radio and television records provided by the Undersecretariat of Telecommunications. Additionally, consultations were held with regional and local experts, including executives from the Colegio de Periodistas (Journalists' Association), journalists at public agencies, and relevant media professionals in each region. These consultations were supplemented by searches of media websites, social media, the *Diario Oficial* (the Official Gazette), and the National Library's media registry. As a result, 1,906 media outlets were identified.

To estimate the total number of people working as journalists in Chile, a survey was sent to all identified media outlets, with 793 responding, corresponding to a response rate of 41.6% (Table 1). The distribution of non-responses showed regional variations that can be explained by contextual and structural factors within the media ecosystem. In the Metropolitan Region (MR), the lower response rate is associated with the high number of registered media outlets that likely ceased to exist following the social unrest and the pandemic, as well as the presence of alternative or very small-scale media outlets, where there are not necessarily professional journalists or whose managers may be reluctant to disclose such information. In regions such as La Araucanía, the lower response rate may be linked to a context of territorial conflict that hinders contact and participation in studies of this type. In Arica and Parinacota and Magallanes –regions located at the northern and southern extremes of the country, respectively– the low response rate is primarily related to logistical difficulties and the absence of direct contact networks in those areas.

2 Project 1: Project of the Fund for Studies on Pluralism in the National Information System PLU190009 *La crisis de la industria de los medios y la precarización del empleo de periodista: consecuencias para la independencia y la calidad de su trabajo* (The crisis in the media industry and the precarization of journalists' employment: consequences for the independence and quality of their work); Project 2: Fondecyt Regular #1210423 *Periodismo chileno en crisis: consecuencias en la concepción de la profesión y su ejercicio post estallido social y pandemia en perspectiva comparada* (2021-2024) (Chilean journalism in crisis: consequences for the conception of the profession and its practice post-social unrest and pandemic in comparative perspective (2021-2024)).

In general, the response rate obtained aligns with the broad universe of registered media outlets, which included not only news media but also initiatives without regular journalistic output, without practicing journalists, and projects that ceased operations following recent crises. This information enabled an initial estimate of 4,705 journalists working in news media. Based on these data, the average number of journalists per outlet in each region was used to estimate the number of journalists in non-responding media. However, since the major media outlets in each region did respond and a high number of very small media outlets were identified (many without news content or journalists), a conservative estimate was chosen by applying the regional average minus one to the non-responding media.

This procedure was not considered valid in the Metropolitan Region, as the most important media outlets there skewed the sample disproportionately. In fact, eight media outlets in the MR accounted for 1,688 working journalists, representing 35.9% of the national total. Excluding these outlets, an average of 8.02 journalists per outlet can be estimated. However, projecting this value onto the non-responding media outlets in the Metropolitan Region may still be disproportionate; therefore, the value of 3 was used to estimate the number of journalists in the non-responding outlets. This calculation yielded a total of 7,364 professionals working as journalists in media outlets nationwide.

Table 1. Percentage of media outlets that responded to the survey by region

Region	No	Yes
Antofagasta	48.9%	51.1%
Araucanía	73.4%	26.6%
Arica and Parinacota	66.0%	34.0%
Atacama	37.0%	63.0%
Aysén	58.1%	41.9%
Biobío	52.0%	48.0%
Coquimbo	50.4%	49.6%
Los Lagos	48.6%	51.4%
Los Ríos	43.4%	56.6%
Magallanes	66.7%	33.3%
Maule	45.5%	54.5%

Metropolitan	74.0%	26.0%
Ñuble	47.4%	52.6%
O'Higgins	50.4%	49.6%
Tarapacá	52.5%	47.5%
Valparaíso	51.2%	48.8%
Total	58.4%	41.6%

Source: Own elaboration

It is worth noting that a large portion of registered media outlets can be classified as small or even micro-media based on the size of their newsrooms. Of the media outlets that responded to the survey, 144 (18.2%) reported having only one journalist, and 173 (21.8%) have two. In total, 613 media outlets (77.3%) have newsrooms with five or fewer journalists. At the other end of the spectrum, only 22 media outlets (2.8%) have newsrooms with 20 or more journalists, all of which are located in the MR.

In addition, the mapping was supplemented with data from the third wave of the international Worlds of Journalism Study (WJS3), a comparative study that, through representative surveys of 32,350 journalists in 75 countries, analyzed perceptions of risk, editorial independence, influences, professional roles, ethics, safety, and working conditions. The study is based on a common conceptual and methodological framework; therefore, the same standardized questionnaire was administered in all participating countries. This integration allowed the findings to be contextualized within a broader framework and enabled a deeper analysis of the dynamics of journalism in the country.

The sampling process for the third wave of the WJS aimed to capture the diversity of journalism in Chile; to this end, it drew on information identified during the previously described census. The sample included 398 journalists, selected through stratified sampling that considered variables such as type of media (national, regional, local, digital, and community-based), as well as geographic and sectoral representativeness. Data collection took place between 2021 and 2024, using telephone surveys.

For data collection, with ethical approval granted by the Social Sciences Committee of the Pontificia Universidad Católica de Chile, a standardized questionnaire provided by the international WJS team was used. This instrument was adapted to the Chilean context through translation and cultural validation, ensuring the relevance of the questions for local participants. The questions explored key dimensions such as perceptions of editorial autonomy, professional roles, external influences, journalistic ethics, and conditions of safety and resilience in the face of risks.

Finally, the collected data were analyzed descriptively, allowing identification of the regional distribution of media outlets and the platforms that make them accessible, as well as the geographic and demographic distribution of journalists in the country. Furthermore, this analysis facilitated identification of the ownership structure within Chile's media system.

4. Results

4.1. Regional distribution of media outlets and their primary medium

Of the 1,906 registered news outlets, the highest concentration is in the Metropolitan Region (MR) with 538 outlets, representing 28.2% of the total. However, its relative proportion per 10,000 inhabitants is low, at 0.7 (Table 2). This indicates a high absolute concentration of outlets but a lower density due to the region's large population. In contrast, Ñuble, with 190 outlets (9.9% of the total), has the highest relative density, reaching 3.7 outlets per 10,000 inhabitants. Valparaíso, with 207 outlets (10.8%), has an intermediate rate of 1.0 per 10,000 inhabitants.

At the other end of the spectrum, Aysén, with only 31 outlets (1.6% of the total), has a high rate of 2.9 outlets per 10,000 inhabitants, which is notable given its small population. Regions such as Atacama and Arica y Parinacota, with 46 and 47 outlets respectively, show densities of 1.5 and 1.8, also reflecting considerable relative values. In contrast, regions such as Biobío (98 outlets, 5.1%) and Los Lagos (72 outlets, 3.8%) have low absolute frequencies and low densities, ranging from 0.6 to 0.8 outlets per 10,000 inhabitants.

Overall, the data show an uneven distribution of outlets nationwide, with a notable concentration in the Metropolitan Region, although this region does not have high relative density rates. The Ñuble and Aysén regions, despite their lower absolute frequencies, stand out for their higher densities. The other regions have more homogeneous densities, with values close to 1 outlet per 10,000 inhabitants. This highlights the need for differentiated approaches based on the demographic characteristics of each region.

Table 2. Media outlets by administrative region

Region	Frequency	Percentage	Per 10,000 inhabitants
MR	538	28.2	0.7
Valparaíso	207	10.8	1
Ñuble	190	9.9	3.7
Coquimbo	141	7.4	1.7
O'Higgins	113	5.9	1.1
Araucanía	109	5.7	1.1
Biobío	98	5.1	0.6
Antofagasta	88	4.6	1.3
Los Lagos	72	3.8	0.8
Maule	66	3.5	0.6
Tarapacá	59	3.1	0.6
Los Ríos	53	2.8	1.3
Magallanes	48	2.5	2.7
Arica and Parinacota	47	2.5	1.8
Atacama	46	2.4	1.5
Aysén	31	1.6	2.9
Total	1,906	100	1

Source: Own elaboration

Regarding the type of media, according to data collected before the social unrest, AM or FM radio is the most frequently represented medium, with 697 cases accounting for 36.6% of the total (Table 3). This highlights traditional radio as the most common medium in this survey, likely due to its historical presence and accessibility.

Table 3. Type of media by primary medium

Primary medium type	Frequency	Percentage
Radio (with AM or FM broadcast)	697	36.6
Online news portal (exclusively digital outlet, with no daily print-layout PDF edition)	499	26.2
Web radio/podcast (no broadcast)	212	11.1
TV (free-to-air and pay)	147	7.7
No information	120	6.3
Social media/YouTube	111	5.8
Print and/or digital newspapers (including Monday through Friday editions)	66	3.5
Magazine/weekly or other non-daily publication	54	2.8
Total	1,906	100.0

Source: Own elaboration

Web portals –defined as exclusively digital news outlets without formatted PDF editions– rank second, with 499 cases (26.2%). This finding underscores the prominent role of digital media in the current ecosystem, likely driven by expanding connectivity and a growing audience preference for online platforms. Web radio and podcasts without a broadcast frequency form a third category, accounting for 212 cases (11.1%), reflecting the expansion of digital-native audio formats.

Television (free-to-air and pay TV) ranks fourth, with 147 cases (7.7%), indicating a comparatively limited presence within the overall landscape. This position may reflect broader structural changes in the media environment, as television increasingly competes with digital platforms and emerging formats.

Social media and platforms such as YouTube account for 5.8% (111 cases), confirming their relevance as alternative distribution channels within the media ecosystem, though they have yet to reach the representational weight of traditional media or web-based outlets. At the lower end of the distribution are print newspapers and their digital equivalents (66 cases, 3.5%) and magazines, weeklies, or other non-daily print publications (54 cases, 2.8%).

Taken together, the data reveal a diversified media ecosystem in which traditional radio retains its dominant position, while digital formats, including websites and web radio/podcasts, continue to gain ground. Print media show a reduced presence, and television plays a comparatively lesser role relative to other mediums. This landscape highlights the importance of accounting for the ongoing transition toward digital distribution and its structural implications for the media system.

Beyond the primary medium, social media platforms (including Instagram, Facebook, TikTok, YouTube, X, and WhatsApp) serve as additional channels for content distribution and audience engagement. Among the 1,906 outlets recorded, the most common configuration involves the use of three social media platforms simultaneously, with 508 cases (26.7%), suggesting a strategic orientation toward maximizing visibility across digital environments (Table 4).

Table 4. Media outlets by number of social media platforms on which they have a presence

No. of platforms	Frequency	Percentage
4	321	16.8
3	508	26.7
2	414	21.7
1	391	20.5
No social media	272	14.3
Total	1,906	100

Source: Own elaboration

Next are those who use two social media platforms, with 414 cases (21.7%), and those who use one, (391 cases, 20.5%). A smaller but significant percentage uses four social media platforms, with 321 cases (16.8%). In contrast, 272 cases (14.3%) correspond to media outlets that do not use social media, which is noteworthy in the context of an increasingly digitized media landscape. The absence of social media may indicate traditional operating models or resource constraints in implementing digital strategies.

This landscape reflects an ongoing transition toward greater digitization but also highlights the coexistence of traditional and modern media strategies. The growing presence on social media, particularly among those who use multiple platforms, may indicate an active effort to adapt to current trends in information consumption. However, the group that does not use social media suggests that some media outlets remain on the sidelines of this dynamic, likely due to structural or strategic factors. This contrast underscores the need to understand the different capabilities and objectives of the media outlets included in the mapping.

4.2. Geographic and demographic distribution of journalists across the country

Regarding the number of journalists reported by registered media outlets (Table 5), there is an uneven distribution across the country's regions. According to the data collected, the total number of journalists is 4,705, distributed among the 793 media outlets that responded to the survey, with a national average of 5.93 journalists per outlet. However, this overall figure masks regional differences, reflecting a concentration in the Metropolitan Region (MR).

Table 5. Percentage of survey participation by region

Region	Average number of journalists per media outlet	Total number of media outlets that responded	Estimated total number of journalists by region	% of total
Tarapacá	3.86	28	108	2.3%
Arica and Parinacota	2.44	16	39	0.8%
Antofagasta	2.84	45	128	2.7%
Atacama	3.34	29	97	2.1%
Coquimbo	2.57	70	180	3.8%
Valparaíso	3.09	101	312	6.6%
O'Higgins	3.70	56	207	4.4%
Maule	3.58	36	129	2.7%
Ñuble	2.28	100	228	4.8%
Biobío	3.51	47	165	3.5%
Araucanía	3.45	29	100	2.1%
Los Ríos	1.60	30	48	1.0%
Los Lagos	3.30	37	122	2.6%
Aysén	3.08	13	40	0.9%
Magallanes	3.44	16	55	1.2%
Total Regions	2.97	609	1,811	41.6%

MR	19.62	140	2,747	58.4%
Total	5.93	793	4,705	100.0%

Source: Own elaboration

The Metropolitan Region is the main employment hub for journalists, with 2,747 reported, representing 58.4% of the national total. This figure underscores the high concentration of major media outlets in this region, which leads not only in absolute numbers but also in staff density per outlet. The average number of journalists per media outlet in the MR is 19.62, significantly higher than the national average, reinforcing its central role within the Chilean media system.

In contrast, regions outside the Metropolitan Region account for 1,958 journalists, or 41.6% of the national total, and present a very different scenario. These regions have 653 media outlets, but with a lower average of 2.97 journalists per outlet, reflecting smaller organizations with fewer human resources compared to the MR.

By specific region, disparities are clear. In the north, for example, Antofagasta accounts for 2.7% of the total estimated number of journalists, Atacama represents 2.1%, and Arica and Parinacota just 0.8%, the lowest in the northern macrozone. In the south-central zone, Valparaíso stands out with 6.6%, followed by Ñuble with 4.8% and O'Higgins with 4.4%, making them the regions with the highest concentration outside the Metropolitan Region. In contrast, Aysén accounts for only 0.9% of the national total and Magallanes for 1.2%, highlighting the structural limitations of their media ecosystems.

Regarding the characteristics of those working in these media, data from the WJS 2021-2023, compared with the previous survey (Mellado et al., 2017), show that the average age of journalists is 41.1 years, indicating an aging workforce compared to the previous average of 33 years. The average length of time working as a journalist is 15.8 years, up from 8.5 years in the previous survey, suggesting a predominance of established professionals in the field.

Regarding gender, 32.2% of journalists are women, a decrease from 43.2% in the previous survey. The educational background of journalists shows an increase in those with some level of specialization or training in the field, reaching 91.5% in this edition compared to 86.5% previously.

The type of media in which they work also shows significant changes. Digitally native media have gained prominence, accounting for 14.1% of jobs, up from 6.1%, while print newspapers, though still relevant, have seen their share decline from 35.2% to 28%. Television and radio maintain stable figures at 23.9% and 31.2%, respectively, reflecting the persistence of these traditional formats in the media ecosystem.

This landscape describes a professional field that combines consolidation in experience and advanced training with persistent inequalities in gender, age, and job stability. The shift toward digital media and the strengthening of specialization stand out as notable trends, while challenges related to equity and the inclusion of new generations in the media system remain issues to be addressed in the future of journalism in Chile.

4.3. Ownership structure in the Chilean media system

The media ownership structure in Chile shows a duality between diversity and concentration, depending on the analytical perspective. Registry data (Table 6) indicate that most media outlets (72.3%) operate independently, while 17.5% are owned by media conglomerates. Numerically, this suggests considerable diversity of media options for the public. However, in terms of market concentration, conglomerates hold a larger market share, particularly in the television and advertising sectors. For instance, in broadcast television, four major channels dominate the audience and receive most advertising revenue, resulting in a concentrated market (CNTV, 2025).

Table 6. Belongs to a conglomerate

	Frequency	Percentage
No	1,378	72.3
Yes	333	17.5
No information	195	10.2
Total	1,906	100

Source: Own elaboration

At the time of analysis, 33 registered outlets belonged to El Mercurio SAP, making it the largest ownership group in the sample. The second-largest conglomerate was the Red de Diarios Comunes (16 outlets), followed by three conglomerates tied for third place: Mi Voz, a citizen media network, Cariviación, and Grupo Diario Sur, each with 13 outlets. These were followed by Copesa (11), Prisa (10), and Bethia (7). It must be noted that these figures are based on publicly available data, and it is possible that additional outlets belong to these conglomerates without explicitly declaring their affiliation. The remaining 217 outlets were distributed across 91 conglomerates, most of which appear in public records with only one or two outlets (58 conglomerates, comprising 84 outlets in total).

Considered solely by the number of outlets available to the public, ownership concentration among large national conglomerates might not seem to pose a significant threat to plurality of voices. This, however, is a limited perspective, as it does not account for audience reach, readership, ratings, advertising revenue distribution, or the fact that several high-circulation newspapers are distributed nationally from Santiago, and that metropolitan broadcast television and radio stations operate extensive national networks that serve as primary news sources for a substantial share of the population.

In any case, one way to gauge the size and relative importance of media outlets is to examine the total number of individuals working as journalists within them. Although conglomerate-affiliated outlets represent only 17.6% of registered media, they employ 44.4% of all journalists in the sample. This disparity underscores the outsized role of conglomerates in employment and content production. By contrast, independent outlets (the numerical majority) lack comparable market influence, which limits their impact on the national media ecosystem.

5. Discussion and conclusions

The findings of this study show that the Chilean media system is undergoing structural reconfiguration, consistent with what international and national literature describes as a multidimensional crisis in journalism, driven by technological, economic, and social transformations (Hanitzsch et al., 2019; Waisbord, 2022). As perspectives from the sociology of journalism and structural analyses of media systems suggest, this transition does not unfold uniformly but instead deepens existing territorial, organizational, and labor asymmetries.

The mapping data show that while the Metropolitan Region has the highest absolute number of media outlets and journalists, its relative density is lower than that of several other regions, such as Ñuble, Aysén, and Magallanes, which have a higher proportion of outlets per capita, suggesting a degree of regional media vitality that is often overlooked in analyses focused exclusively on the country's capital.

This greater regional density does not necessarily translate into more favorable conditions for journalistic production. On the contrary, the data indicate that regional and local outlets predominantly operate with very small editorial teams –often just one or two journalists– placing them in conditions of high job precarity and limited production capacity. Structural changes in the media ecosystem have had a particularly severe impact on micro-outlets and small-scale initiatives, many of which did not survive the successive crises associated with the 2019 social unrest and the COVID-19 pandemic, a process extensively documented in recent research (Grassau et al., 2023; Gajardo & Mellado, 2024). This attrition is reflected, among other indicators, in the disappearance of the print format, though not necessarily in the abandonment of its underlying logic.

The digital transition emerges as a cross-cutting feature of the system. The intensive use of social media by most outlets reflects strategies aimed at maintaining visibility, distributing content, and sustaining audience engagement under conditions of limited resources. Yet this adaptation is far from uniform: while some outlets succeed in establishing a multiplatform presence, others remain on the margins of these dynamics, reflecting structural inequalities in technological, economic, and professional capacities.

Another notable finding is the resilience of radio, which has strengthened its position as the most widely distributed medium in the country. Radio shows a remarkable capacity for adaptation, combining its historically rooted territorial presence with the adoption of digital platforms and social media. Its organizational structure, more flexible and less dependent on large capital investments, appears to provide greater stability during recent crises, reinforcing its role as a key actor in media pluralism, particularly at regional and local levels.

Regarding ownership structure, the results confirm that while most outlets operate independently, conglomerates account for a significant proportion of journalism jobs and, by extension, news production capacity and public influence. This concentration of human resources reinforces the structural weight of large media groups, particularly in the Metropolitan Region, and shapes career trajectories, production routines, and opportunities for professional specialization, an aspect already noted by Mellado et al. (2010). At the same time, the fact that more than half of the country's journalists work outside conglomerates reveals a fragmented and heterogeneous professional field, sustained largely by small and medium-sized organizations.

From the perspective of professional practice, the data suggest that the resilience of Chilean journalism is primarily anchored in the core of the system, i.e., in newsrooms and professional routines (Porath et al., 2025). This resilience, however, coexists with precarious working conditions, a marked gender gap, and an aging workforce, all of which strain the field's long-term sustainability, as documented in the national literature (Mensa et al., 2021; Hudson-Frías et al., 2022).

The empirical basis produced by this study provides grounds for rethinking strategies to strengthen journalism in Chile from a systemic perspective. The mapping reveals not only where media outlets and journalists are located, but also the asymmetries in news production conditions, an information necessary to inform a discussion that acknowledges the territorial and organizational diversity of the media ecosystem. As approaches to media mapping and pluralism suggest, systematized knowledge of news infrastructure is a prerequisite for intervening in the system in an informed and transparent manner (Rodríguez-Urra et al., 2023; Trappel & Meier, 2022).

In conclusion, this study confirms that the Chilean media system is undergoing a complex transition characterized by greater diversity of actors and platforms, yet also by a persistent concentration of resources and influence. Strengthening media pluralism requires moving toward comprehensive public policies that recognize the heterogeneity of the ecosystem, promote the sustainability of local and regional outlets, and improve working conditions for journalists. Only through such measures will it be possible to consolidate a more equitable and resilient media environment commensurate with the country's democratic needs.

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7. Specific contributions of each author

	Name and Surname
Conception and design of the work	William Porath
Methodology	William Porath
Data collection and analysis	William Porath, Constanza Ortega-Gunckel, Daniela Grassau, Eduardo Arriagada
Discussion and conclusions	Constanza Ortega-Gunckel, Daniela Grassau
Drafting, formatting, version review and approval	William Porath, Constanza Ortega-Gunckel, Daniela Grassau, Eduardo Arriagada

8. Conflict of interest

The authors declare that there is no conflict of interest contained in this article.

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