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News Media (R)evolution in Poland 2016–2025: New Mainstream of (Big) AI Ecosystems

ABSTRACT

The highly competitive media environment in Poland is characterized by an evolution from so-called traditional broadcast media and social media toward the mainstream of AI ecosystems (within “AI media”), dominated by Big AI. In Poland, the shift in audience attention from broadcast media to broadly defined online media is accompanied by an erosion of the importance of social media and its fragmentation, as well as by integration driven by the largest AI ecosystems, which have recently been leveraging AI-generated summaries and other news-related functionalities. The loss of strategic autonomy within these ecosystems poses existential challenges for news media publishers, compounded by a crisis in their market relevance (defined by negative CAGR results), declining trust in news media and journalists, increasing news avoidance, and decreasing traffic to their websites and applications.

KEYWORDS: media capture, media management, AI, media capture, media ecosystem, mainstream media

STRESZCZENIE

(R)ewolucja mediów informacyjnych w Polsce 2016–2025. Nowy mainstream ekosystemów (Big) AI

Wysoko konkurencyjne środowisko mediów w Polsce charakteryzuje się ewolucją od tzw. tradycyjnych mediów nadawczych i mediów społecznościowych jako mainstreamu ku mainstreamowi ekosystemów AI (w ramach „mediów AI”), zdominowanemu przez Big AI. Przepływowi zainteresowania odbiorców z mediów nadawczych do szeroko pojętych mediów on-line towarzyszy w Polsce erozja znaczenia i fragmentacja social mediów oraz integracja przez największe „ekosystemy AI” wykorzystujące ostatnio podsumowania AI i inne funkcje związane z wiadomościami. Utrata w tych ekosystemach strategicznej samodzielności stawia przed wydawcami mediów informacyjnych egzystencjalne wyzwania pogłębiane przez kryzys ich rynkowego znaczenia (definiowany ujemnymi wynikami CAGR), spadek zaufania do news media i dziennikarzy

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oraz unikanie informacji i zmniejszenie ruchu na ich stronach internetowych (i w ich aplikacjach).

SŁOWA KLUCZE: przechwycenie mediów, zarządzanie mediami, sztuczna inteligencja, ekosystem mediów, media mainstreamowe

Introduction

The publication focuses on changes in news consumption and distribution as well as on the advertising market. The aim of the analysis presented is to provide a theoretical synthesis of these changes, taking into account the complexity of technological and market processes and, to a lesser extent, social ones. The concept of “media capture” (e.g., Nechushtai, 2018) is adopted as the analytical lens.

The publication adopts the following assumptions (including terminological ones):

1. the term “ecosystem” (Birch & Bronson, 2022) is replacing the term “platform.”—This applies primarily to Big Tech companies, which are not only, or even primarily, digital platforms but heterogeneous ecosystems consisting of users, assemblages of technical devices, platforms, developers, payment systems, etc., as well as legal agreements, rights, claims, standards, and so on.
2. AI is not a technological term in this ecosystem but a “set of technological arrangements and socio-technical practices as well as an ideology” (Raley & Rhee 2023, pp. 188–189).
3. AI media—a term emphasizing the convergence of media and AI, and the role of media as part of the emerging AI ecosystem, with platformization, data, algorithm—based automation, machine learning, deep learning, personalization, and chatbots (Feher, 2024).
4. Mainstream—“mainstream media are large, institutionalized news organizations characterized by professional journalism, wide reach, and adherence to dominant norms of news production” (Holt et al., 2019).

This theoretical study adopts a method of theoretical synthesis, in which the literature review process is not an end in itself but rather a source material from which an updated theoretical framework is developed (e.g., Pound & Campbell, 2015). This involves the iterative mapping of concepts onto current AI-driven phenomena and the identification of areas in which existing theories and practices fall short or require extension. Emphasis is placed on theoretical depth and a diversity of perspectives. The method is also complemented by secondary analysis (desk research). The study also draws on authoritative industry sources that may not yet be fully reflected in the academic literature, including research conducted by PwC and the Reuters Institute (2015–2025).

Evolution of the main sources of information in Poland

With the growing access of Polish households to the internet (95.9% in 2024 compared with 68% ten years earlier; GUS, 2025), it became the main source of information (77% in 2025), including social media, which for the first time equaled television in this respect (both reaching 54%) (Newman, 2025). The press was a source of news for 10% of respondents in 2025 (down from 25% in 2015). This was a lower level than TikTok (11%) and similar to podcasts (9%) (Table 1).

In 2025, 7% of users in Poland used AI chatbots as a source of news, one of the highest rates in Europe (alongside Switzerland). This new access channel and source of information complements and gradually displaces previously dominant online channels, especially non-AI-supported search engines, which in 2017 were the main (62%) news gatekeeper in Poland—the highest level among all markets studied by the Reuters Institute in 2017.

Table 1. Main sources of news in Poland, 2016–2025

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Online (overall)	82	87	86	86	87	84	80	77	72	77
TV	80	78	77	76	75	70	59	56	54	54
Social media (overall)	58	58	59	60	66	59	55	50	48	54
Facebook	50	53	54	61	65	55	49	48	42	40
YouTube	31	32	37	39	36	35	33	30	31	32
Messenger	-	10	13	22	24	25	21	19	15	13
Instagram	-	-	-	9	12	13	12	12	12	12
TikTok	-	-	-	-	-	-	7	11	10	11
Press	32	27	27	25	24	17	13	11	10	10
Chatbots	-	-	-	-	-	-	-	-	-	7

Source: compiled on the basis of Reuters Institute reports from 2016–2025.

Since 2017, as in other markets, a larger share of users has preferred content selected by algorithms (search engines, social media, and aggregators) rather than by editors (direct notifications, emails, mobile alerts, etc.). This effect has been particularly visible among users who primarily accessed news via smartphones and among younger users (Newman et al., 2017).

Younger people (up to 24 years of age) are also the least inclined to visit news websites and news apps (Reuters, 2025). This is confirmed, among other evidence, by qualitative research conducted among first- to third-year journalism

students, which shows that around 20% of them do not use news portals such as Onet, WP, or Interia at all and are unfamiliar with how they operate, considering them irrelevant to meetings their information needs (Kreft et al., 2026).

Between 2016 and 2025, television in Poland lost a large proportion of viewers who had treated it as their main source of news (a decline from 80% to 54%). For comparison, this trend is evident in many markets, for example, in the United States (from 69% to 50%), Germany (from 82% to 61%), the United Kingdom (from 79% to 48%), France (from 85% to 61%), and Japan (from 69% to 50%). There are also substantial differences between age groups: in Poland, television is treated as the main source of information by 50% of people aged 55 and over, but by only 20% of those aged 18–24 (Reuters, 2025).

At the same time, fragmentation in the television market is deepening. In 2024, only six television programs exceeded three million viewers, compared with 49 programs a year earlier. Viewing time remained stable, but audiences were increasingly dispersed across formats and platforms. Radio, meanwhile, remains at a stable, low level as a source of news—for example, 6% according to CBOS (2024)—which does not mean that it lacks reach: approximately 19 million people (over 60% of the population) listen to the radio daily (Kantar, 2024).

In many countries (e.g., the United States, Brazil, Australia, and Sweden), the decline in social media's importance as a news source began after 2016. In Poland, however, the turning point proved to be the pandemic, which first propelled social media to historic peaks as a source of information (in 2020), and after the pandemic, interest fell back to the level recorded a decade earlier. This evolution nevertheless has its established leaders (Facebook, which still maintains a dominant position) as well as new challengers (Instagram and TikTok).

For the press as a source of information in Poland, the pandemic also proved to be a turning point. Interest in the press declined over the five year period from 2016 to 2021, i.e. up to the pandemic period, from 47% to 27%. This crisis primarily affected free newspapers (for commuters) (Reuters Institute, 2021). Newspapers and magazines have been struggling with declining circulation and advertising revenues, which have led to job cuts and social unrest.

The complex dynamics of media consumption in Poland are illustrated by patterns of news consumption in 2022, following the outbreak of the war in Ukraine. YouGov research commissioned by the Reuters Institute and conducted in several countries one month after the outbreak of the war, shows that in Poland, interest in news increased by 7 percentage points compared with the pre-war level, returning to the level recorded in 2021 during the COVID-19 pandemic. Attention focused primarily on online information sources (websites, non-mainstream sites, and social media) (40%), while television attracted the attention of 38% respondents in Poland. By comparison, online sources attracted the attention of 24% of respondents in Germany, while television accounted for 46%. Specialist websites attracted the attention of 9% of

Poles (the same as social media) and 4% of Germans (compared with 6% for social media). The study showed that the war was followed closely (“extremely” + “very”) by 49% of Germans and 25% of Poles. At the same time, as many as 25% of Poles and 5% of Germans were not interested in the war at all. Thus, such an important event led to a concentration of attention on different media in the two countries: in Poland, mainly online sources; in Germany, television.

The coexistence of the “new” and the “old,” both in Poland and in other countries, is illustrated by a relatively small group of influencers who began or continue their professional careers in traditional media and build their position as opinion leaders by using the possibilities of direct interaction with users on social media platforms and by drawing on news produced by traditional media (Kahn, 2025). Overall, however, no more than 24% of news audiences in Poland pay attention to influencers (Reuters Institute, 2025).

Erosion of trust in news media

From 2015 to 2025, public trust in news media in Poland declined by 17 percentage points, according to the annual *Digital News Report* prepared by the Reuters Institute (2024) (table 2).

Table 2. Trust in news media

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Poland	55	53	48	48	45	48	42	42	39	47

Source: Reuters Institute Reports (2015–2025).

Compared with other European countries, Poland’s average level of trust in the media is relatively low, and trust is evenly distributed across generations (Baby Boomers, Gen X, Millennials, Gen Z) (see also Brosius et al., 2022). In this context, attention should also be paid to the broader trend—present in many countries—of declining trust in news (Newman et al., 2025), as well as to the general phenomenon of distrust toward both old and new media (Suiter & Fletcher, 2020, p. 41). This is accompanied by a belief, dominant among supporters of populism and expressed in folk stories, that “everything is biased” (Miro, 2025).

This already complex picture is further shaped by the polarization of news audiences. Poland has the highest proportion (54%) among the 46 countries analyzed by the Reuters Institute of people who believe that news organizations are politically divided (Newman et al., 2025). Moreover, in trust surveys, the profession of journalist ranked last among all professions in Poland (PAR, 2023).

Avoidance of the news media

An important factor influencing the dynamics of change in the Polish information market is news avoidance. In 2025, 43% of users in Poland declared frequent or occasional avoidance of news (one of the highest rates among the markets studied), alongside a significant decline in trust in news (from 56% to 47% over the decade 2015–2025) (Reuters Institute Reports, 2015, 2025).

Poles are also becoming less interested in news: in 2025, 43% frequently or occasionally avoided news. This is higher than the average (39%) for all countries studied by the Reuters Institute, 4 percentage points higher than a year earlier, and as much as 21 percentage points higher than in 2017. The reasons are complex: an excess of negative content—war, crises, and dramatic events—which is emotionally overwhelming; information overload—“too much news”—leading to a sense of saturation; and low credibility or lack of trust in the media, as a significant proportion of society does not believe that the media are objective. Only one-fifth of Poles believe that the media are free from pressure (PAP, 2022). A significant proportion of younger and less educated people report avoiding news because it can be difficult to follow or understand, suggesting that news media could do much more to simplify language and better explain or contextualize complex stories (Reuters, 2022).

Only for comparison, news avoidance was also observed in reporting on the war in Ukraine and is also present in neighboring Germany as well (an increase from 29% to 36%; in Poland, from 41% to 47%). This trend is accompanied by a declining—but still high compared with other markets—level of ad-blocker use (IAB, Polska).

Crisis of journalistic hegemony

The erosion of trust in the media, polarization, and information avoidance are part of a broader crisis of social and cultural consensus, involving a rupture in the relationship between the professionalism and responsibility of journalists—“hegemonies”—and their media, and the attribution of meaning to news and its distribution (Nerone, 2013).

In the years following the systemic transformation initiated in Poland in 1989, the logic of journalistic hegemony meant that news media held the power to decide which facts and ideas would be presented, while their owners gained this “power without responsibility” by demanding that the public believe they had granted autonomy and independence to their journalistic employees. This allowed journalists to claim autonomy both from the state and from their own employers (Nerone, 2013).

This hegemony is eroding. Journalism in the broadly defined West is losing its dominance over news media and the information environment, as well

as its power in the public sphere. The model of journalism and its traditional institutions (publishers, newsrooms), built on the information monopoly of daily newspapers and television stations, is crumbling. “Journalism was the primary, authoritative source of information about the world; professional journalists held a monopoly on producing information and defining what counted as news, in accordance with a professional ideology that included, for example, objectivity and professionalism” (Deuze, 2005).

Under pressure from technological innovation, journalism and its institutions have lost their significance as gatekeepers, and their authority has also eroded (Nerone, 2013). Media platformization (Nieborg et al., 2025) and the development of AI platforms and AI media are accelerating this erosion. The growing share of chatbots in the creation of news content (8% in 2025, with a projected 12% in 2026) and the fact that bots account for more than 51% of global internet traffic (Imperva, 2024) are further manifestations of this trend.

Expectations toward journalism have not yet disappeared, but media users have realized that existing news organizations are unable to meet them and doubt whether they should do so at all (Nerone, 2012). Users have noticed an overrepresentation of hegemonic rhetoric, or even falsehood, when journalists and media organizations claim to speak on their behalf, in defense of democracy, and so on. They noticed an overrepresentation of hegemonic rhetoric – a way of speaking about journalism, its values, and its practice as natural, obvious, and universal, even though in reality these are historically shaped and tied to a specific configuration of power (Barnhurst & Nerone, 2009). The hegemonic rhetoric that dominates the discourse about journalism concerns journalistic objectivity and the belief that the current model of journalism is the ‘best of all possible ones.’ Examples of such rhetoric include claims that ‘a journalist should be neutral and objective’ and that ‘professional media are a guarantor of democracy’ (even though these claims are contested in academic research, e.g., Jakobsson & Stiernstedt, 2023). Media users perceive the falsity of this rhetoric when journalists and media organizations also claim to speak on their behalf, etc. The decline in trust in professional news media is a key manifestation of the crisis of journalism’s hegemony, more important than the decline in employment in professional media (Nerone, 2013; Kreft, 2025).

Evolution of media finances—the crisis of the press, TV, and traditional advertising

To identify changes in the media market based on achieved and projected financial results (including individual segments), the CAGR indicator is used, as in PricewaterhouseCoopers’ annual forecasts. The entire Polish entertainment and media (E&M) market is expected to grow at an average annual rate of 3.9%

in 2024–2028 (PwC, 2025). The fastest-growing segments of the E&M market remain online advertising, video games, and OTT (over-the-top) services.

On average over the entire period, the CAGR for the Polish E&M market was 3.54%, with higher growth rates in the initial period (2016–2021, approximately 4–6%) than in the latter part of the analyzed period. Growth rates varied significantly across segments. The highest average (19%) was recorded for VOD and streaming. Above-average growth was also recorded for digital advertising (8.6%) and the video games segment (8.0%). Below-average CAGR was observed for cinemas (box office) (3.2%) and radio (2.0%). Despite the importance of television, traditional advertising experienced a decline in real revenues (–1.4%), and the steepest decline affected the press (print + digital) (–6.6%) (PwC, 2025).

These results correspond with the evolution of news sources: declining interest in television and the press was accompanied by weaker financial performance in these segments. A further deepening of these trends is visible in forecasts for 2025–2029, particularly the growing importance of digital platforms. The downward trend in real revenues (after accounting for projected inflation) applies to newspapers and magazines (PwC, 2025), as well as to television market revenues and television advertising. Overall, Poland is expected to remain a regional leader in Central and Eastern Europe, but also the slowest-growing market in the region, with total television revenue projected to grow at a CAGR of 1.4% in 2024–2028.

Discussion: regulated mainstream—“ecosystem and media capture”

In these complex relations between traditional media and platforms, a dependency crystallizes that can be described as asymmetric interdependence. As users and advertisers migrate to AI platforms imposing their own logic of market value creation and tools for managing attention and financial flows, traditional media organizations occupy a dependent position. Metaphorically speaking, the former news mainstream has been regulated according to rules over which it has had—and continues to have—very limited influence.

During the analyzed period, publishers' dependence on (AI) platforms evolved from hegemonic to subordinate. The theoretical context of this process has so far been captured in isolated but mutually reinforcing studies. AI platforms initially appeared as “parasitic” and later “symbiotic” (Nechushtai, 2018, p. 1052), before imposing a multidimensional dependence on news media (Sebbah et al., 2020).

The theoretical lens through which this process can be examined is “media capture” (Nechushtai, 2018). Originally, in media management theory, this referred to “infrastructure capture” through the provision of tools for news

production, audience analytics, and marketing analysis (Poell et al., 2018). In later formulations, it also encompassed the structural weakening of news as an institution (Jungherr & Schroeder, 2021) and cognitive capture, whereby journalists accept the logic of platforms, including valuing journalistic content by the number of views and equating the importance of topics with their popularity. From the perspective of AI platforms, media capture means coming to occupy a central position in the information ecosystem (Papaevangelou, 2024).

Existential challenges of GenAI

This enforced cooptation (i.e., cooperation among competitors) appears to be entering a new, mature stage of “media vassalization.” While display and native advertising remain the main—but declining—sources of publishers’ revenues, and most organisations rely on three to four revenue streams, most newsrooms are undergoing major or minor changes triggered by GenAI (Reuters, 2025). Most publishers under this pressure now intend to invest more effort in building relationships with AI platforms, including OpenAI (Reuters, 2025). This strategy of cooperating with a competitor (“frenemy”) is confronted with an existential challenge: search disruption, i.e., declining referral traffic from Facebook and Instagram, and the development of AI that “blocks traffic” across most content websites. In other words, within the ecosystem imposed on news media, a mechanism of intensified dependence is emerging.

In light of these changes, publishers need to seek new business models, develop hybrid solutions, and explore new channels (e.g., Bluesky, LinkedIn, etc.) (López-Cepeda et al., 2025). This challenge is all the more urgent given that only 14% of Polish respondents are willing to pay for online news content—below the average (17%) for the 47 countries studied by the Reuters Institute. Poles are more willing to subscribe than the French (11%) and the British (8%), although in both countries there are systems supporting local print media (Reuters Institute, 2024).

Conclusion

The analysis of media in Poland in 2016–2025, encompassing two major events (the pandemic and the war in Ukraine), reveals a picture of dynamic change. The entire media ecosystem has been captured, to varying degrees, by AI platforms. Media capture affects not only media infrastructure but also radically limits the strategic room for maneuver in development. The practical manifestation of this capture is a sharp decline in the importance of certain media as sources of news (the press, fragmented television), turbulence in social media, and the emergence of

new sources (chatbots) belonging to AI platforms—the new hegemon of the “AI ecosystem.” All of this occurs amid an erosion of interest in news and user trust. A practical and symbolic manifestation of these changes is the shift identified in 2017 toward the dominance of algorithmic content selection over editorial choice.

The new “AI media” ecosystem has owners—BIG AI companies (Van der Vlist et al., 2024)—and none of them originate from traditional media organisations, which further illustrates the radical nature of the changes. While the global AI market is experiencing rapid growth and a handful of new media-technology companies—the “Big AI Houses” (Crawford, 2021)—serve as ecosystem hegemonies, traditional information hegemonies are losing strategic control over their own development, over information content and its modes of distribution, and even over the narrative of their own future.

The dynamic changes in Polish media are part of a broader evolutionary cycle. When a new medium emerges, other media undergo a hegemonic phase, while older media attempt to adapt to survive (Scolari, 2013). At the same time, they are subject to dynamics of simulation throughout their life cycle—simulating or being simulated—and, as in non-Euclidean geometry, the evolution of each medium does not proceed along a separate track but remains in constant interaction with the evolution of other media (Scolari, 2013).

According to Scolari, new media do not lead to the complete disappearance of so-called old media, but rather change their function within the media ecosystem. For example, the press becomes more niche and/or digital. In the Polish context, in the life cycle of *Gazeta Wyborcza*, one of the leaders of the Polish news press, its circulation declined from about 159,000 copies in 2016 to 27,000 in 2025—roughly a fivefold decrease—but its business model has shifted toward digital subscriptions (e.g., Czuma, 2020).

In 2013, Scolari wrote that it is not difficult to imagine a network of relationships connecting all media, resembling a three-dimensional network rather than a Darwinian tree in media evolution (Scolari, 2013). Such a network is the system of AI platforms, held together by data collected for better user targeting for market purposes, for shaping user experience, and for training GenAI, which in the new “AI media” ecosystem (Feher, 2024), plays the role of the Holy Grail of progress, driven by missionary AI organisations (Kreft, 2023).

EXPLANATIONS OF TERMS

OTT – delivery of content directly to the audiences via the internet, bypassing traditional cable or satellite operators.

CAGR – compound annual growth rate; in the media and advertising industry, it refers to the average annual growth rate of a given value (e.g., revenues, the number of users, or market value).

VOD – a media service that allows users to watch video content (films, series, television programs) at any time of their choosing, without the need to follow a fixed television schedule.

BIG AI – a term referring to Large AI Models and, among other things, the use of Big Data analysis by technology companies (so-called Big Tech).

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