UNIVERSITY OF OXFORD

Reuters Institute
for the Study of Journalism

REUTERS INSTITUTE DIGITAL NEWS REPORT 2016



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Nic Newman with Richard Fletcher,
David A. L. Levy and Rasmus Kleis Nielsen

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FOREWORD

Dr David A. L. Levy
Director, Reuters Institute for the Study of Journalism (RISJ)

This is our fifth annual report that explores the changing environment around news across countries. The report is based on a survey of more than 50,000 people in 26 countries, which makes it the largest ongoing comparative study of news consumption in the world and twice as big as last year. A key focus is in Europe where we have done the bulk of our polling – but we are delighted to have added Canada and South Korea this year to the United States, Australia, Brazil, and Japan, which have been part of our survey for some time.

This year's report comes against the backdrop of renewed concerns about the future of the news industry, the move to mobile, the rise of ad-blocking and the role of technical platforms and other intermediaries. We have data on many of these issues and find compelling evidence about the move to distributed content and the growing importance of social media as a source of news. Also this year we've looked to understand how branded news is found, consumed and shared in a more distributed news world with the help of some additional focus groups in the UK, US, Germany and Spain. We reference this research throughout the report and we'll be publishing a full account of these sessions on our website later in 2016.

Once again we have combined the key data points with a series of essays, which add depth and context to the findings. *New York Times* CEO Mark Thompson reflects on the business challenges, while Edelman UK CEO Ed Williams explores the importance of trust and the role of brands based on their ground-breaking work on these issues with the Edelman Trust Barometer. RISJ Director of Research, Rasmus Kleis Nielsen explores our attitudes to algorithms in serving up relevant news stories and Ofcom's Alison Preston has been exploring how young and older groups in the UK navigate issues like trust and credibility in a more fragmented and complex news ecosystem.

In terms of academic partnerships, we are joined this year by the Centre d'études sur les médias, Université Laval, in Québec City, Canada. Our active research community includes the News and Media Research Centre at Canberra University in Australia, Dublin City University, Ireland, the Hans Bredow Institute in Hamburg, Roskilde University in Denmark, The University of Tampere in Finland, and the School of Communication at the University of Navarra in Spain.

Many of our partners are also organising events or country reports looking in more detail at national themes and adding wider value to this international project.

We continue to make efforts to open up as much of the data as possible via our website at (www.digitalnewsreport.org). This contains slidepacks, charts and raw data tables, along with a licence that encourages reuse, subject to attribution to the Reuters Institute. Also this year, we have updated our interactive feature, which allows anyone to explore and visualise the data by themselves by country and over time.

We hope that all of this will continue to build into an invaluable resource for academics, media owners, journalists and those developing policy. A description of the methodology is available on the website along with the complete questionnaire.

Making all this possible, we are hugely grateful to our sponsors this year: Google, the BBC, Ofcom, the Broadcasting Authority of Ireland (BIA), the Media Industry Research Foundation of Finland, the Fritt Ord Foundation in Norway, the Korea Press Foundation, Edelman UK, as well as our academic sponsors at the Hans Bredow Institute, the University of Navarra, the University of Canberra and the Centre d'études sur les médias, Université Laval in Canada.

We are also grateful to YouGov, our polling company, who did everything possible to accommodate our complex requirements and helped our research team analyse and contextualise the data.

I am particularly grateful to Nic Newman for his great work in leading our most ambitious *Digital News Report* to date and for surfacing such a rich analysis from a mass of data, to Richard Fletcher for all his work on the report, the data analysis and the country profiles, and to Alex Reid for so ably managing the process of moving from manuscript to publication.

METHODOLOGY

This study has been commissioned by the Reuters Institute for the Study of Journalism to understand how news is being consumed in a range of countries. Research was conducted by YouGov using an online questionnaire at the end of January/ beginning of February 2016.

- The data were weighted to targets based on census/industry accepted data, such as age, gender and region, to represent the total population of each country. The sample is reflective of the population that has access to the internet.
- As this survey deals with news consumption, we filtered out anyone who said that they had not consumed any news in the past month, in order to ensure that irrelevant responses didn't adversely affect data quality. This category averaged 3.5% but was as high as 13% in Canada.
- A comprehensive online questionnaire was designed to capture all aspects of news consumption.
- A number of face-to-face focus groups were held in the US, UK, Germany and Spain to explore issues relating to news consumption and the question of trust.

Our survey was conducted online and as such the results will under-represent the consumption habits of people who are not online (typically older, less affluent, and with limited formal education). Where relevant, we have tried to make this clear within the text. The main purpose, however, is to track the activities and changes over time within the digital space – as well as gaining understanding about how offline media and online media are used together. A fuller description of the methodology and a discussion of non-probability sampling techniques can be found on our website.

Along with country-based figures, throughout the report we also use aggregate figures based on responses from all respondents across all the countries covered. These figures are meant only to indicate overall tendencies and should be treated with caution.

METHODOLOGY

COUNTRY	FINAL SAMPLE SIZE	TOTAL POPULATION	INTERNET PENETRATION
USA	2,197	321,368,864	87%
UK	2,024	64,767,115	92%
Germany	2,035	81,174,000	88%
France	2,162	66,132,169	84%
Italy	2,195	60,795,612	62%
Spain	2,104	46,439,864	77%
Portugal	2,018	10,374,822	68%
Ireland	2,003	4,625,885	83%
Norway	2,019	5,165,802	96%
Sweden	2,030	9,747,355	95%
Finland	2,041	5,471,753	94%
Denmark	2,020	5,659,715	96%
Belgium	2,018	11,258,434	85%

COUNTRY	FINAL SAMPLE SIZE	TOTAL POPULATION	INTERNET PENETRATION
Netherlands	2,006	16,900,726	96%
Switzerland	2,004	8,236,573	87%
Austria	2,000	8,584,926	83%
Hungary	2,056	9,849,000	76%
Czech Republic	2,014	10,538,275	80%
Poland	2,000	38,005,614	68%
Greece	2,036	10,812,467	63%
Turkey	2,157	77,695,904	60%
South Korea	2,147	49,115,196	92%
Japan	2,011	126,919,659	91%
Australia	2,021	22,751,014	93%
Canada	2,011	35,675,834	95%
Brazil	2,001	204,259,812	58%

Please note that in both Brazil and Turkey our samples are representative of urban rather than national populations and as such the internet penetration is likely to be higher than stated above, which must be taken into consideration when interpreting results. *Source:* Internet World Stats www.internetworldstats.com internet population estimate 2015

AUTHORSHIP AND RESEARCH ACKNOWLEDGEMENTS



Dr David A. L. Levy is Director of the Reuters Institute for the Study of Journalism and an expert in media policy and regulation. He previously worked at the BBC both as a news and current affairs producer, reporter, and editor, and later as Controller Public Policy. He is the author of *Europe's Digital Revolution: Broadcasting Regulation, the EU and the Nation State* (Routledge, 1999/2001), and joint author or editor of several RISJ publications.



Nic Newman is a journalist and digital strategist who played a key role in shaping the BBC's internet services over more than a decade. He was a founding member of the BBC News Website, leading international coverage as World Editor (1997–2001). As Head of Product Development he led digital teams, developing websites, mobile, and interactive TV applications for all BBC Journalism sites. Nic is currently a Research Associate at the Reuters Institute for the Study of Journalism. He is also a consultant on digital media, working actively with news companies on product, audience, and business strategies for digital transition.



Dr Richard Fletcher is a Research Fellow at the Reuters Institute for the Study of Journalism. He is primarily interested in global trends in digital news consumption. In 2015 he authored a supplementary *Digital News Report* (published by RISJ) on digital news consumption in Poland, Austria, Czech Republic, Netherlands, Portugal, and Turkey. Richard's original undergraduate and employment background was in computer science. Since then he has completed an MSc in Science, Medicine, Technology and Society from Imperial College London and a PhD in Sociology from the University of Surrey.



Dr Rasmus Kleis Nielsen is Director of Research at the Reuters Institute for the Study of Journalism and Editor in Chief of the *International Journal of Press/Politics*. His work focuses on changes in the news media, political communication, and the role of digital technologies in both. He has done extensive research on journalism, American politics, and various forms of activism, and a significant amount of comparative work in Western Europe and beyond. Recent books include *The Changing Business of Journalism and its Implications for Democracy* (2010, edited with David A. L. Levy), *Ground Wars: Personalized Communication in Political Campaigns* (2012), and *Political Journalism in Transition: Western Europe in a Comparative Perspective* (2014, edited with Raymond Kuhn).

Country-level commentary and additional insight around media developments has been provided by academic partners and by our network of Reuters Journalist Fellows around the world.[1] Authorship is referenced at the bottom of the respective country page in section 2.

Additional expert analysis and interpretation of the survey data were provided by the team at YouGov, in particular Charlotte Clifford, Paul Marshall, David Eastbury, Ema Globyte, Stephanie Frost, and Ash Strange.

[1] Reuters Institute Fellowships offer an opportunity to mid-career journalists to spend time researching an aspect of journalism for one or more terms at the Institute in Oxford.



OVERVIEW AND KEY FINDINGS

Nic Newman
Research Associate, Reuters Institute

This year we have evidence of the growth of distributed (offsite) news consumption, a sharpening move to mobile and we can reveal the full extent of ad-blocking worldwide. These three trends in combination are putting further severe pressure on the business models of both traditional publishers and new digital-born players – as well as changing the way in which news is packaged and distributed.

Across our 26 countries, we see a common picture of job losses, cost-cutting, and missed targets as falling print revenues combine with the brutal economics of digital in a perfect storm. Almost everywhere we see the further adoption of online platforms and devices for news – largely as a supplement to broadcast but often at the expense of print.

SOME OF THE KEY FINDINGS

- Across our entire sample, half (51%) say they use social media as a source of news each week. Around one in ten (12%) say it is their main source. Facebook is by far the most important network for finding, reading/watching, and sharing news.
- Social media are significantly more important for women (who are also less likely to go directly to a news website or app) and for the young. More than a quarter of 18–24s say social media (28%) are their main source of news – more than television (24%) for the first time.
- The growth of news accessed and increasingly consumed via social networks, portals and mobile apps means that the originating news brand gets clearly noticed less than half the time in the UK, and Canada. In countries like Japan and South Korea, where aggregated and distributed news is already more widespread, the brand only gets noticed around a quarter of the time when accessed through news portals.
- Television news still remains most important for older groups but overall usage has continued to decline, particularly for 'appointment to view' bulletins and amongst younger groups.
- In terms of devices, smartphone usage for news is sharply up, reaching half of our global sample (53%), while computer use is falling and tablet growth is flattening out.
- Most consumers are still reluctant to pay for general news online, particularly in the highly competitive English-speaking world (9% average), but in some smaller countries, protected by language, people are twice as likely to pay.
- Business problems for many publishers have worsened with the rise of ad-blocking, which is running at between 10% (Japan) and 38% (Poland) but much higher amongst under-35s and people who use news the most. The vast majority of those who have ever downloaded a blocker are using them regularly, suggesting that once downloaded people rarely go back.
- Only around 8% of smartphone users currently use an ad-blocker but around a third of respondents say they plan to install one on their mobile in the next year.
- Although publishers and technology platforms are pushing online news video hard for commercial reasons, we find evidence that most consumers are still resistant. Three-quarters of respondents (78%) say they still mostly rely on text. When pressed, the main reasons people give for not using more video are that they find reading news quicker and more convenient (41%) and the annoyance of pre-roll advertisements (35%)
- Trust in news is highest in Finland (65%) and lowest in Greece (20%). Almost everywhere, editors and journalists are trusted less than news organisations.

- We find strong concerns that personalised news and more algorithmic selection of news will mean missing out on important information or challenging viewpoints. Having said that, we find that young people are more comfortable with algorithms than with editors.
- Media companies that have nailed their colours to a distributed future like BuzzFeed are gaining ground in terms of reach. But these new brands and platforms are mostly used as secondary sources and for softer news subjects. *Main* usage online remains with brands that have a strong news heritage and have been able to build up a reputation over time.

RISE OF DISTRIBUTED NEWS

We now have five years of data looking at the sources people use for news. In most countries we see a consistent pattern with television news and online news the most frequently accessed, while readership of printed newspapers has declined significantly.

But the biggest change in digital media has been the growth of news accessed via social media sites like Facebook, Twitter, Instagram, and Snapchat. In the United States, to take one example, the percentage of people saying they use social media as a source of news has risen to 46% of our sample – almost doubling since 2013.

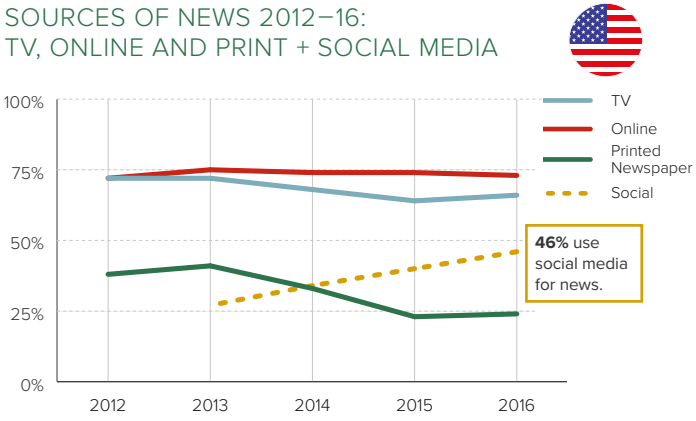
We see the same trends elsewhere; our weighted EU average[2] also shows 46% using social media for news – even if some countries like the UK (35%) and Germany (31%) have moved less far in this direction. High adoption in countries like Greece, Brazil and Turkey means that usage across all 26 countries averages 51%.

But this is not just about *access* to news via social media, our data suggest that an increasing proportion are coming to depend on it for direct consumption. News has become a more important part of the Facebook mix over the last year. Algorithms have prioritised breaking news, news-related videos, live streams, and other visual content, while publishers have been stepping up their efforts to publish native formats. Since mid-2015 they have been able to publish full 'instant articles' within Facebook's walled garden itself.[3] Our focus group research for this year's *Digital News Report* shows that, as news now comes to people through social media feeds, there can be less need to go directly to a news website:

> **"The stories that come through are usually the breaking stories that I would otherwise have to go to NewYorkTimes.com. Now I don't."**
> *(35–54 year old, US Focus Group)*

> **"A lot of the breaking news I find through Facebook or Twitter now. It's really crazy. Like when David Bowie died."**
> *(35–54 year old, US Focus Group)*

SOURCES OF NEWS 2012–16: TV, ONLINE AND PRINT + SOCIAL MEDIA



Q3. Which, if any, of the following have you used in the last week as a source of news? *Base:* Total sample 2012-2016. *Note:* 2014 data has been estimated because of an issue with randomisation of news sources in the questionnaire

SOCIAL MEDIA AS A NEWS SOURCE (SELECTED COUNTRIES)

GRE	74%	POR	66%	POL	58%
TUR	73%	HUN	64%	SWE	56%
BRA	72%	SPA	60%	DEN	56%

Q3. Which, if any, of the following have you used in the last week as a source of news? *Base:* Total sample in each country

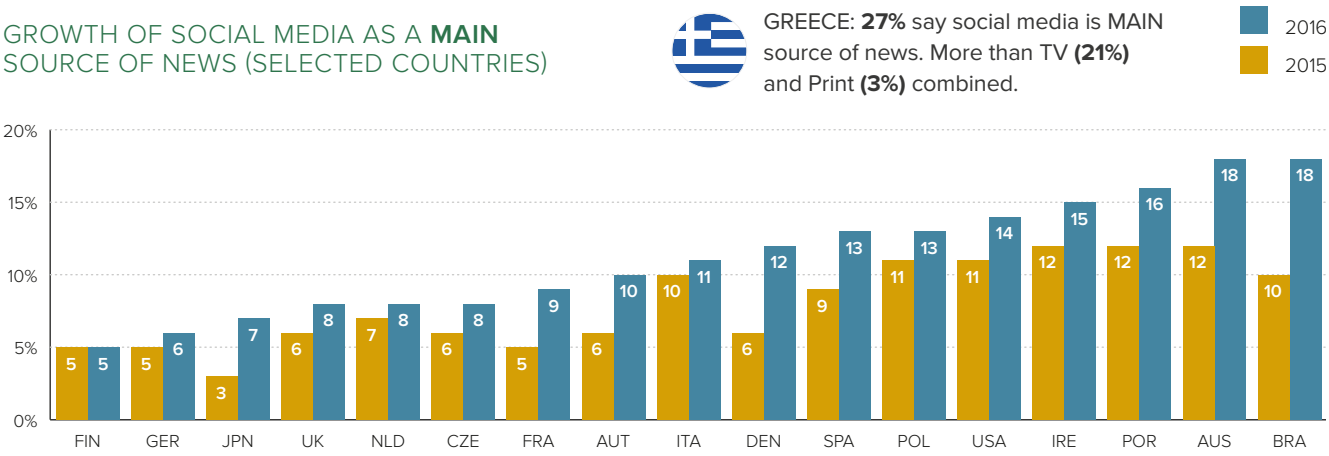
Taken together, these changes may be contributing to the increase we see in our data around social media as a source of news. Within the EU (10%) and the United States (14%), at least one in ten now say social media are their MAIN source of news, with even higher figures in Australia (18%) and Greece (27%) (see chart overleaf).

[2] Average figures are weighted by population of the 17 EU countries we surveyed. Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden, and the UK. This accounts for 91% of the total EU population.

[3] Facebook launched Instant Articles in May 2015 with a limited set of content. The format has now been opened to all publishers.

GROWTH OF SOCIAL MEDIA AS A **MAIN** SOURCE OF NEWS (SELECTED COUNTRIES)

GREECE: **27%** say social media is MAIN source of news. More than TV **(21%)** and Print **(3%)** combined.

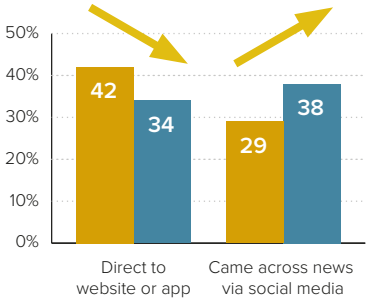


Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news. *Base:* All in 2015/2016 who used a source of news in the last week: (between around 1500 and 2000 in each country)

We also see significant generational and gender differences. We find that women are much more likely to use social media to find news and less likely to go directly to a website or app. Social media – and Facebook in particular – are the *only* discovery mechanism that appeal more to women than men (see chart opposite).

These changes, of course, need to be set in context of wider news consumption. Social media is just one way of accessing online news – the vast majority of which still ends up being consumed on a news website. In addition to online access, most consumers also continue to access news via TV, radio, or print (see chart below) but the extent of this is significantly affected by age. For every group under 45, online news is now more important than television news. For 18–24s social media (28%) comes out ahead of TV (24%) for the first time with print lagging behind at just 6%.

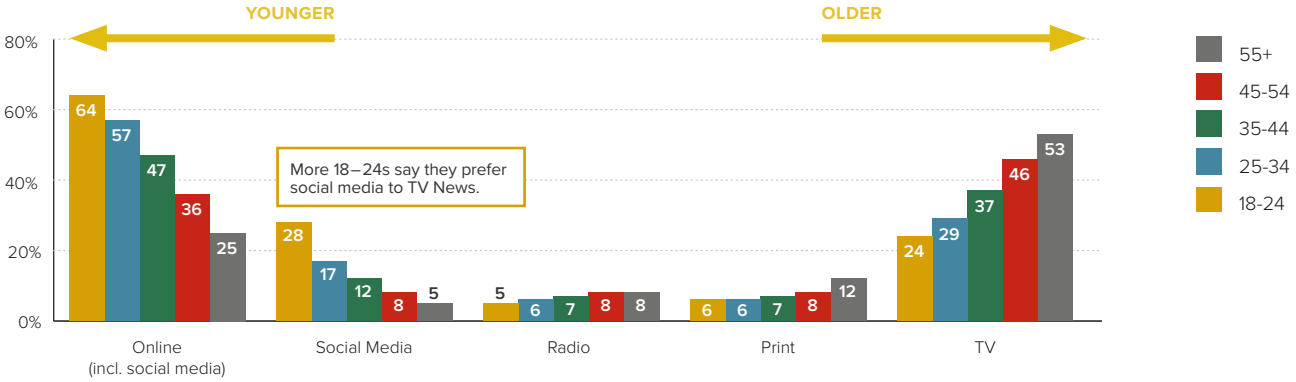
WOMEN ARE MORE LIKELY TO USE SOCIAL MEDIA (ESP. FACEBOOK) TO DISCOVER NEWS (ALL COUNTRIES)



	MALE	FEMALE
Email	17%	16%
Mobile alert	11%	10%
Search	40%	38%
Aggregator	13%	10%

Q10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? *Base:* Total sample/Male/Female: All countries = 53330/26098/27232

MAIN NEWS SOURCES SPLIT BY AGE (ALL 26 COUNTRIES)



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news? *Base:* All 18-24s/25-34s/35-44s/45-54s/55+ who have used a news source in the last week: All countries = 5598/9187/9686/9383/18371

These findings about age and gender have significant implications for many news organisations as they rethink their distribution strategies and agendas in order to engage active users onsite, at the same time as less engaged users in social media.

For more analysis see sections 3.1: Sources of News, p. 86 and 3.7: Distinctions between Hard and Soft News, p. 96.

SOCIAL NETWORKS FOR NEWS

In terms of the key social networks for news, we have seen little significant change since last year with Facebook maintaining its dominant position. Across our sample 44% say they use Facebook for news, which in turn represents two-thirds of all Facebook users. YouTube is also a key network (19%) while Twitter remains an important social network for news (10%) favoured by journalists, politicians, and heavy news users in particular. Instagram continues to grow fast, along with WhatsApp in some countries.

Facebook is the largest network in every country we have surveyed – with the exception of Japan. This is partly because Japanese prefer networks that allow anonymity, but there are also several popular home-grown networks such as Line and Mixi. In South Korea too, where we have conducted polling for the first time this year, popular messaging apps Kakao Talk (22%) and Kakao Story (9%) are giving Facebook (24%) and Instagram (4%) a run for their money in the news arena.

With the exception of WhatsApp and Kakao Talk in Korea, one surprise is the low levels of news usage for messaging applications. Although Snapchat is one of the fastest growing new networks, only around 1% in most countries say they use it for news. For the first time we asked specifically about usage of Snapchat Discover (see right), a poster child for distributed content which was launched at the beginning of 2015 in the UK and US as a showcase for branded news content from publishers like Cosmopolitan, Mail Online, and National Geographic. In our data we find that it reaches 12% of 18–24s of our US sample but so far only 1% in the United Kingdom.

For more social network data see country pages in section 2, p. 30

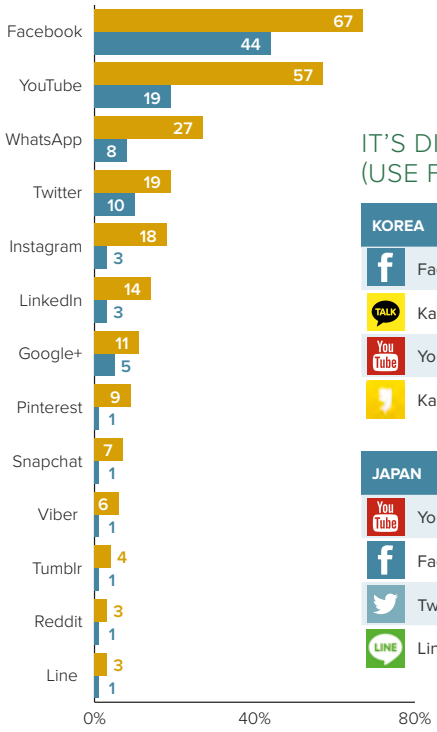
SHARING OF NEWS

Social networks are not just important for discovery, they also encourage discussing and sharing the news. Around a quarter of internet news users (24%) share news via social media during the average week; these are people who tend to be passionate about subjects like politics, business, technology, or the environment. The super sharers tend to be heavy news users, often using multiple devices and a significant proportion use the smartphone as a main device.

Most people share predominantly news of which they approve (Finland, Australia, and the United States) which in turn may be affecting the amount of positive news stories that people get exposed to. By contrast, sharers in the UK tend to be more combative – or perhaps more cynical – and are comparatively more likely to share things they don't like.

For more analysis see section 3.8: Participation and Online News, p. 99.

TOP SOCIAL NETWORKS (ALL COUNTRIES) – FOR NEWS AND ANY PURPOSE



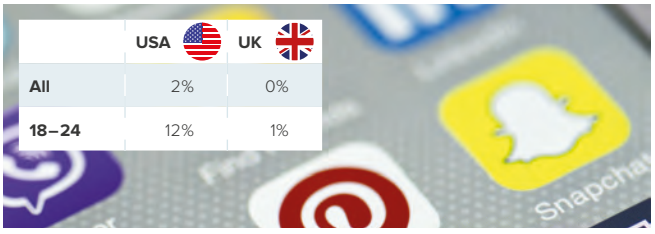
IT'S DIFFERENT IN ASIA (USE FOR NEWS)

KOREA	
Facebook	24%
Kakao Talk	22%
YouTube	16%
Kakao Story	9%

JAPAN	
YouTube	26%
Facebook	16%
Twitter	16%
Line	13%

Q12a/b. Which, if any, of the following have you used for any purpose/for reading, watching, sharing, or discussing news in the last week? *Base:* Total sample in each country

WEEKLY REACH FOR SNAPCHAT DISCOVER



	USA	UK
All	2%	0%
18–24	12%	1%

BuzzFeed

BuzzFeed say **more than 20%** of its total traffic comes from Discover[4]

COSMOPOLITAN

Cosmopolitan generates **3m views** each day

Q10c. When using the internet for news, have you used any of the following sites or mobile apps that aggregate different news links in the last week? *Base:* Total sample in each country

[4] Buzzfeed figures via Jonah Peretti recode interview, Cosmopolitan via Digiday: http://recode.net/2015/09/16/this-week-on-recode-decode-ceo-jonah-peretti-explains-how-buzzfeed-won-the-internet/

THE ROLE OF NEWS AGGREGATORS

While Facebook has been the main focus for distributed content over the past year, especially in the US and Europe, it is worth pointing out that platform-based aggregators *already* play a dominant role in many countries in our study – especially in parts of Asia and continental Europe.

The most popular news destination in Korea is Naver (66% weekly reach), an aggregator and full service portal which includes video, games and email. It is a similar story in Japan where Yahoo (59% weekly reach) aggregates news from multiple publishers across web and mobile. These portals are also the MAIN source of news for a large proportion of the population in these countries and in many cases publishers are paid carriage fees for their content.

In Portugal, much of the news media publish content through the SAPO platform, which is where significant numbers find, read, and share their stories and videos. In Poland, the two biggest news destinations, Onet and WP, are also well-established and well-funded portals which are now branching out to produce more of their own content including video news programmes online.

For more see section 2: Korea, Japan, Portugal and Poland country pages.

In some countries we have also seen the arrival of new mobile aggregators such as Apple News, which launched in the US, UK, and Australia in 2015. This provides a personalised interface for multiple branded news sources and provides new competition for existing mobile apps such as Flipboard, SmartNews, and Nuzzel. Tracking usage of these apps is a difficult area to explore because of the difficulty of categorising different types of services (apps, websites, social channels) and then communicating this complexity to survey respondents. But at a headline level it is clear that most are still confined to early adopters and do not *yet* have anything like the impact of either Facebook or first-wave portals.

NEW MOBILE AGGREGATORS (SELECTED COUNTRIES)

UK	
Apple News	3%
Flipboard	3%
Smart News	1%

AUSTRALIA	
Apple News	4%
Flipboard	4%
Smartnews	2%

USA	
Apple News	4%
Flipboard	4%
Smart News	1%

Q10c. When using the internet for news, have you used any of the following sites or mobile apps that aggregate different news links in the last week? *Base:* Total sample in each country

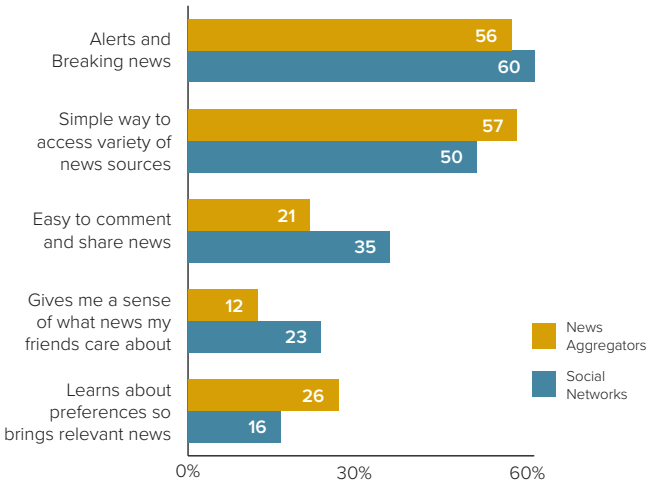
Google News remains an important aggregator, reaching 24% in Portugal and 20% in Poland but only 4% in the United Kingdom. In the Czech Republic, local search engine Seznam has links to news sources on its homepage with a reach of 74%. We also find strong mobile and web news aggregators in the Nordic region with Ampparit in Finland (11%), Sol (14%) and Startsiden (18%) in Norway, and Omni in Sweden (10%). Meanwhile popular aggregators in Italy include Giornali (17%) and Rassegna Stampa Quotidiani (11%) and in Spain Menéame (3%).

For more analysis see section 3.3: Comparative Brand Data Analysis, p. 89.

REASONS FOR USING NEWS AGGREGATORS AND SOCIAL NETWORKS

We have both survey and focus group evidence this year about *why* many people are turning to social networks and news aggregators for online news. From our survey data, the key reasons given relate to both speed of update and convenience in bringing multiple sources into one place. Respondents feel that aggregators do a better job of providing quick and easy access to a variety of news sources, but prefer social networks for interactivity.

WHY PEOPLE USE SOCIAL MEDIA/AGGREGATORS FOR NEWS (GERMANY, USA AND UK DATA)



Q10bi/ci. You said earlier that you use social media/news aggregators as a source of news. What are some of the reasons for this? *Base:* All that used social media/news aggregators in the last week: US + UK + Germany = 2334/1011

> I use a news aggregator called Menéame... with stories ranging from the BBC to El Confidencial. The stories which the users consider to be the most interesting are the ones which make the headlines."
> *(35–54 year old, Spain Focus Group)*

> I usually go through Apple News. It gets a variety of things, like I'm interested in certain topics that I probably wouldn't find or I'd have to search for it myself so it's like a one stop shop of things that interest me."
> *(18–34 year old, US Focus Group)*

ALGORITHMS VS EDITORS

Both social media and personalised news applications are changing the nature of story selection. The choice of whether a story appears in an alert, a feed or aggregated homepage is sometimes decided by an editor but increasingly by computer algorithms that take into account factors that might include (1) recency and popularity, (2) what you've read before, and (3) what your friends have been reading or sharing.

This year, we wanted to understand more about how people viewed the idea of algorithms in general, but also what type of recommendations were more valued. The results were, on the surface, a little surprising, with algorithms that take account of what you've read before coming out ahead of editorial selection.

I AM HAPPY FOR NEWS TO BE SELECTED FOR ME BASED ON...



36%
Automatically based on what I've read before



30%
Judgement of editors or journalists



22%
Automatically based on what my friends have consumed

Q10D_2016a_1/2/3: Indicate your level of agreement with the following statements: Having stories selected for me by editors and journalists is a good way to get news/ Having stories automatically selected for me on the basis of what I have consumed in the past is a good way to get news/Having stories automatically selected for me on the basis of what my friends have consumed is a good way to get news. *Base:* Total sample

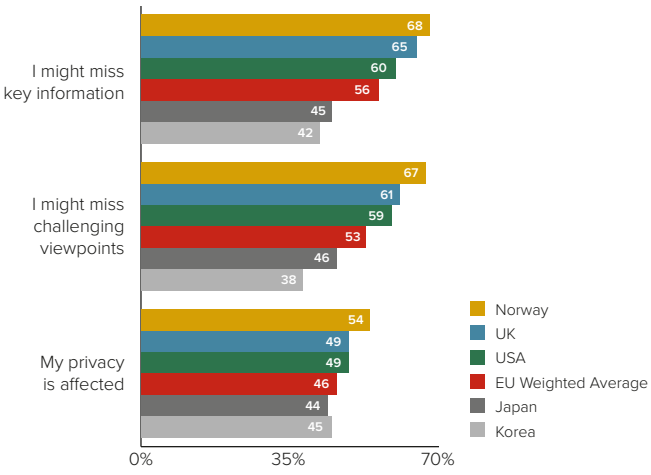
One way to interpret this is that, in the end, people think *they* are the best judge of what they want. Professionals are the next best, and inexpert friends come last. In our focus group work, it was clear that many active internet users now see *themselves* as editors – balancing and comparing multiple sources, multiple editorial judgements, and even multiple algorithms.

> You've got to read a few sources to really come up with a true story of things I think. I mean if you want to double check that what you're reading is true."
> *(18–34 year old, US Focus Group)*

> With social media you are your own editor."
> *(18–34 year old, UK Focus Group)*

Respondents everywhere expressed some concerns about the possible negative impact of algorithms, with Norwegians and British amongst those who most fear that key information or challenging viewpoints might be lost in an algorithmically-driven filter bubble.

I AM WORRIED ABOUT PERSONALISED NEWS IF IT MEANS...



Q10D_2016b_1. Indicate your level of agreement with the following statements: I worry that more personalised news may mean that I miss out on important information/I worry that more personalised news may mean that I miss out on challenging viewpoints/I worry that more personalised news may mean that my privacy is placed at greater risk. *Base:* Total sample in each country

All age groups were equally concerned about these developments though it is important to note the multi-platform nature of most modern news usage. Taking the UK as an example, two-thirds (66%) of social media users also watch TV news in a given week and almost a third (29%) read a printed newspaper. More than half of those using news aggregators (58%) also watch TV news in a given week with a third (34%) reading a printed newspaper.

Looking at news consumption in this holistic way, it is clear that editors still play a considerable role in shaping agendas directly and influencing the stories that emerge in social networks and other aggregators.

For more see essay 4.3: Rasmus Kleis Nielsen, 'People Want Personalised Recommendations (Even as they Worry about the Consequences)', p. 112.

IMPLICATIONS OF DISTRIBUTED CONTENT FOR MEDIA BRANDS

The growth of distributed content and a consequent increase in algorithmic story selection is one of the hottest topics of media discussion. Academic and media commentator Emily Bell has argued that (a) publishers are losing control of distribution and (b) there is an opaqueness and unpredictability about these algorithms controlled by tech companies and driven by commercial motivations.[5]

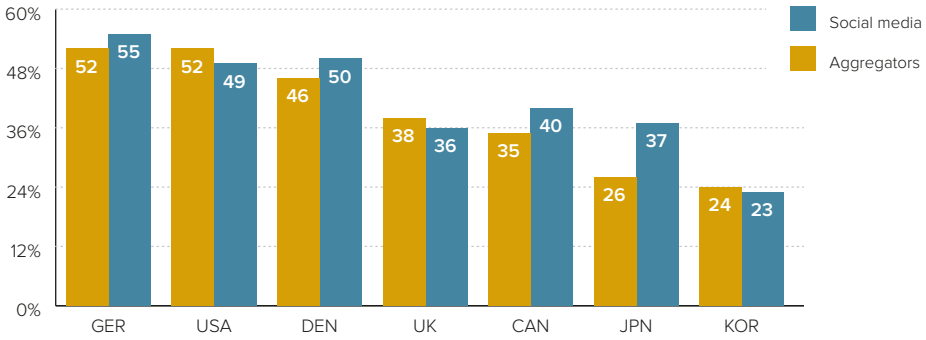
A key related concern is the extent to which news brands are even noticed in distributed environments. This will be critical to whether publishers can capitalise on the reach and exposure that these platforms afford.

In this regard, our data suggest a mixed picture with relatively strong brand recognition in countries like Finland (60%) and Germany (55%), while only around a third say they notice the brand in social networks (most or all of the time) in highly competitive English-speaking markets such as the UK, Australia, and Ireland.

Consumers in some countries say they are even less likely to notice a specific brand when accessing news via an aggregator. In Korea and Japan, where aggregated news sites are the norm, only around a quarter say they always or mostly notice the brand.

These data suggest that, if the rest of the world becomes more like Japan and Korea with aggregated news playing a bigger role, news brands may increasingly struggle to gain recognition and much of the credit may be inherited by the platform.

PERCENTAGE WHO NOTICE NEWS BRANDS VIA SOCIAL MEDIA/AGGREGATORS



ALSO...

Finland	**60%**
Australia	**36%**
Ireland	**33%**

Almost/mostly notice the brand in social media

Q10b/cii_2016. Thinking about when you have used social media/aggregators for news, typically how often do you notice the news brand that has supplied the content? *Note:* Notice = % who always or mostly notice the brand. *Base:* All who used social media/aggregators as a source of news in the last week: Germany = 616/292, Denmark = 1126/150, US = 1018/478, Canada = 947/741, Japan = 552/936, UK = 693/241, Korea = 700/828

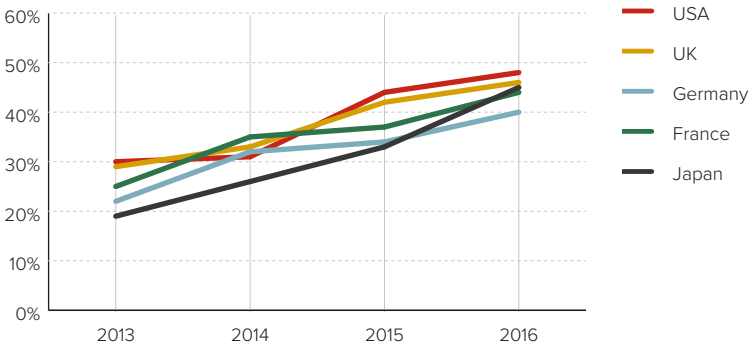
[5] 'Facebook is eating the world': http://www.cjr.org/analysis/facebook_and_media.php

DEVICES FOR NEWS AND THE RISE OF MOBILE

We continue to see rapid adoption of smartphones for news in all the main countries we have been monitoring since 2013 (see next chart). By contrast, computer usage is falling and growth in tablet usage has slowed – falling back in countries like the UK and Japan.

Across our entire sample over half (53%) now say they use a smartphone to access news, with some of the highest levels in three of our new countries, Sweden (69%), Korea (66%), and Switzerland (61%). In all these cases usage is now higher than from computers or laptops. Investment in infrastructure and low data charges have helped some countries get ahead – for example in the Nordic region – while others like Belgium (39%), Canada (39%), Germany (40%), and the Czech Republic (40%) are lagging some way behind.

GROWTH OF SMARTPHONE FOR NEWS 2013–16 (SELECTED COUNTRIES)



ALSO...

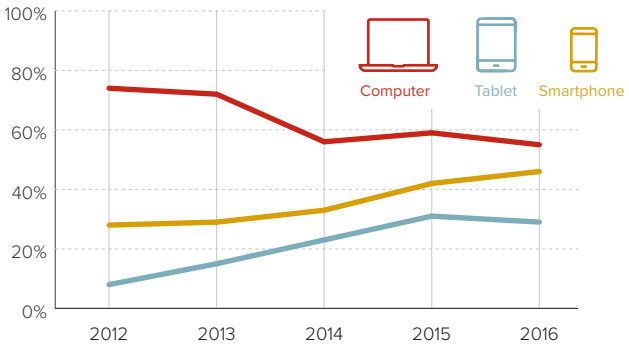
Sweden	69%
Korea	66%
Norway	64%
Switzerland	61%
Denmark	60%
Ireland	59%
Finland	59%
Spain	58%

Q8b. Which, if any, of the following devices have you used to access news in the last week? *Base:* Total 2013-2016 sample in each country

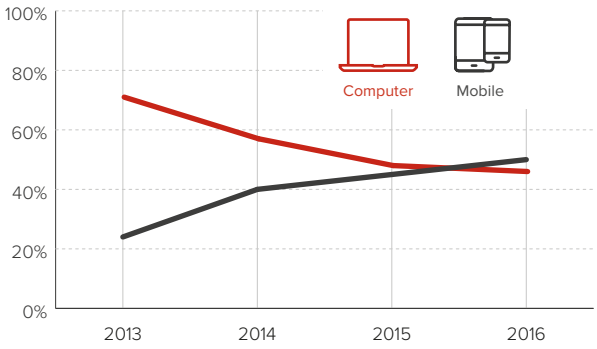
Taking the UK as an example, we can see how usage has changed over the last five years. In terms of main device, the mobile/tablet now outstrips the computer. We have reached the mobile tipping point with a publisher like the BBC reporting that around 70% of traffic now comes from mobile devices.

In terms of demographics, we see the same pattern of usage across countries. Younger groups show a strong preference for the smartphone while older groups are more comfortable with tablets and computers (see chart at top of next page). For some the tablet – with its larger screen size – is replacing the computer as a more flexible shared device in the home, while the personal nature of the smartphone is both extending usage in the home and providing ubiquitous access on the move.

CHANGING DEVICE USE IN UK 2012–16 – WEEKLY REACH PER DEVICE

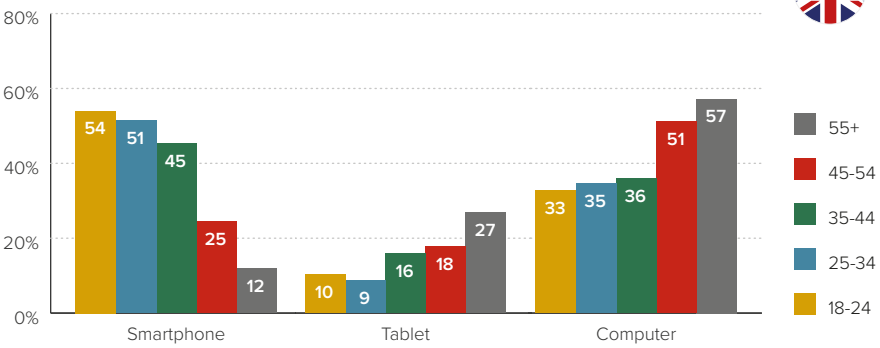


CHANGING DEVICE USE IN UK 2012–16 – RISE OF MOBILE (MAIN SOURCE)



Q8b. Which, if any, of the following devices have you used to access news in the last week? *Base:* Total 2012-2016 sample. **QUK8b6_5.** You've said you use the following devices to access news in the last week, which is your MAIN way of accessing online news? *Base:* All in 2013-2016 who used a digital device to access news in the last week: UK = 1638/1598/1795/1691 *Note:* Mobile refers to combined figures for tablet and smartphone

MAIN DEVICES FOR NEWS SPLIT BY AGE (UK ONLY)



QUK8b6_5. You've said you use the following devices to access news in the last week, which is your MAIN way of accessing online news? *Base:* All 18-24s/25-34s/35-44s/45-54s/55+ who used a digital device to access news in the last week: UK = 196/176/254/335/730

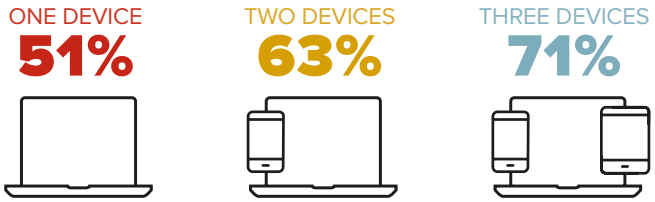
SMARTPHONES ENCOURAGE MORE FREQUENT ACCESS AND GREATER SOCIAL SHARING

Across our sample we find that heavy smartphone users tend to access the news more frequently than people who mainly use computers or tablets. Almost a fifth (19%) of those who use the smartphone as a MAIN device say they access news more than five times a day. We also find that people who use multiple devices are also much more likely to access news more frequently. To some extent this is because this group is more interested in news but it also the case that every year we see more people using multiple devices. This year almost half (47%) of our entire sample use two or more devices for news each week.

We also have evidence that the move to smartphone goes hand-in-hand with the move to distributed content. When we ask people about the MAIN way in which they come across news stories we see that people use social media more on the smartphone, whilst they are less likely to use a branded entry such as a website or app (see chart right). This is true even if we take account of the fact that smartphone users tend to be younger and tend to use social media more.

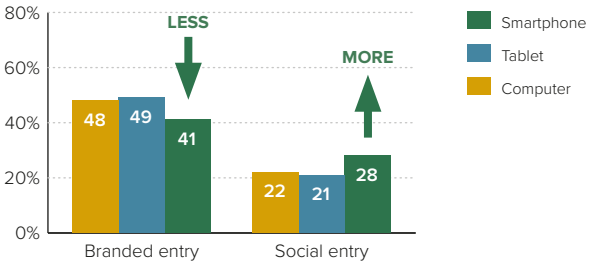
This data helps explain why BuzzFeed's Jonah Peretti argues that mobile is a much better platform for social content than desktop ever was.[6] He says that BuzzFeed is targeting the 'bored on the sofa network' in the evenings as much as people who are looking for news and entertainment during the day. In our data, BuzzFeed is up around 5 percentage points in the UK and a similar amount in the United States. Around 75% of its traffic comes from social media – a point reinforced by our focus group respondents who told us that they rarely set out to visit the site directly.

FREQUENCY INCREASES WITH DEVICE USE (AVERAGE OF ALL COUNTRIES) – % ACCESSING NEWS SEVERAL TIMES/DAY



Q1b_rc. Typically, how often do you access news? **Q8b.** Which of any, of the following devices have you used to access news in the last week? *Base:* Total sample

MAIN PATHWAYS TO NEWS BY DEVICE (ALL COUNTRIES)



Q10a/b/c. Thinking about how you get online news using your computer/ smartphone/tablet, which is the MAIN way in which you come across news stories? *Base:* All using multiple online sources for news and use a computer/smartphone/ tablet for news: All countries = 16423/14242/6438

> "BuzzFeed comes onto my Facebook. I actually got it from my daughter."
> *(35–54 year old, UK Focus Group)*

> "I only ever find myself there. I've never gone to the BuzzFeed website."
> *(20–34 year old, US Focus Group)*

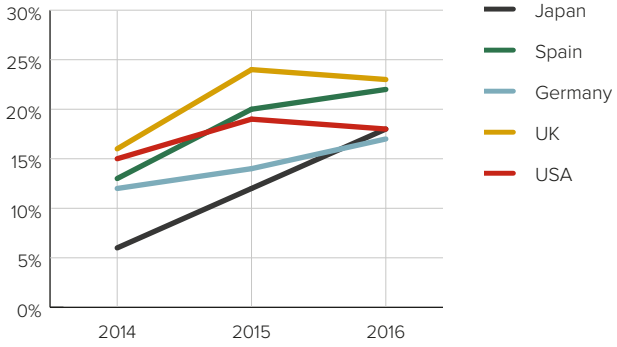
[6] Jonah Peretti interview with the *Financial Times*, Mar. 2016: http://www.ft.com/cms/s/0/4f661ea8-e782-11e5-a09b-1f8b0d268c39.html#ixzz43Xmxszfc

THE ROLE OF DESTINATION AND THE POWER OF APPS

Although newer brands make much of their prowess in distributed news, it is interesting to note that brands like Buzzfeed have started to invest more in apps over the last year as a destination for loyal users[7] – and perhaps also to protect themselves from an overdependence on the algorithms of Facebook and other platform providers. A few well-established media brands continue to attract most of their traffic directly with apps, an increasingly important part of a destination strategy.

This year our data shows that app users are much more interested in news than the average web user. They are also better educated and more likely to have paid for online news, perhaps not surprising given that many apps are only usable in conjunction with a subscription. Effectively these are the heavy users and core loyalists that all news organisations – new and old – need to engage with in order to help fund their journalism while reaching out to less committed users via social media.

% USING A NEWS APP ON SMARTPHONE OR TABLET (SELECTED COUNTRIES)



APP USERS ARE...

- More interested in news
- Have higher levels of income
- More likely to be male
- A bit older
- 50% more likely to pay for online news

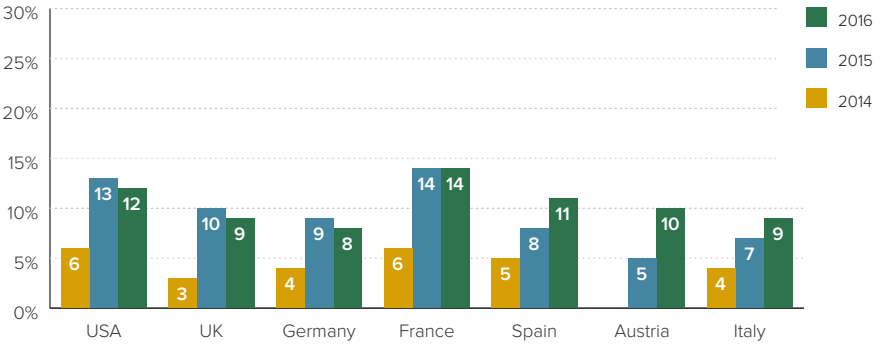
Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? *Base:* Total 2014-16 sample in each country. *Note:* Figures based on combined smartphone and tablet news app use

Another key reason for investing in apps is to enable content to be pushed to smartphone and tablet users. Alerts and notifications are becoming a key weapon for publishers in the battle to attract attention and to bring audiences back more regularly to a particular brand. Our data show strong increases in mobile alerts in Spain (+3) and Austria (+5) this year and a stabilisation of the relatively high levels we have already seen in the US, UK and France. Facebook has also launched a new service called Notify in the US to aggregate and simplify the notification process.

The management of relevant notifications informed by data is becoming an important new discipline in newsrooms with the *New York Times* amongst publishers setting up a specific team to do this.[8]

> **"We used to be standing on a hill and shouting messages at people. Now, there's a growing number of users who only engage with us when we send a push."**
>
> *Andrew Phelps, Product Director of Messaging and Push, New York Times*

% USING PUSH ALERTS AND NOTIFICATIONS FOR NEWS (SELECTED COUNTRIES)



Q10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? *Base:* Total 2014-2016 sample in each country

[7] BuzzFeed app strategy from Digiday, Apr. 2016: http://digiday.com/publishers/inside-buzzfeeds-mobile-plans-breaking-news-domination

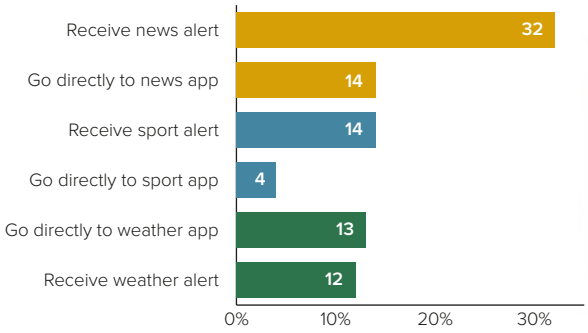
[8] Digiday, 'Inside the *New York Times*': http://digiday.com/publishers/inside-new-york-times-new-push-notifications-team

SMARTWATCHES FOR NEWS

For the first time this year, we have tracked the usage of smart watches like the Apple Watch and Samsung Gear. These devices integrate closely with smartphone operating systems and many news companies have developed specific interfaces for the watch along with providing another channel for push alerts.

So far, however, we find that only a few early adopters have bought these devices with less than 1% in both the US and Europe using them for news. Of those that do use news, push alerts seem to be more popular than going directly to an app, though this is more equally split for weather.

MOST USEFUL ROUTE TO NEWS ON A SMARTWATCH





Q8bii. You've said you used a **smart watch or wristband** for news in the last week. Which ONE of the following do you find MOST useful? *Base:* All who used a smartwatch in the last week: All countries = 288

FIRST NEWS ACCESS IN THE MORNING

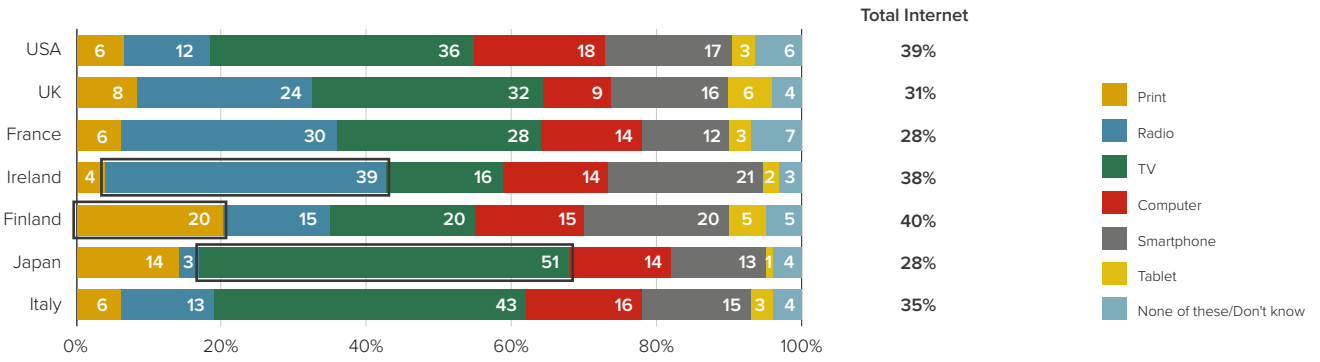
The addictive nature of smartphones (and smart watches) is also impacting how some people start their day. Mobile internet devices have entered the bedroom and they increasingly take their place alongside radio, television, and print for the right to deliver the first updates of the day.

Many of these early morning news habits have been laid down for generations but we also find significant country-based differences. Over half of our Japanese sample (51%) turn first to television news in the morning, as do 43% of Italians.

By contrast, in Ireland, almost four in ten start their day with radio news. But in countries with strong reading cultures, like Finland and Japan, a significant minority still sit down with a printed newspaper in the morning, even though both countries are in other ways extremely digital.

In all seven countries where we asked this question, we find that the internet is first choice for around a third of news consumers, with around half of these using the smartphone and half using a computer.

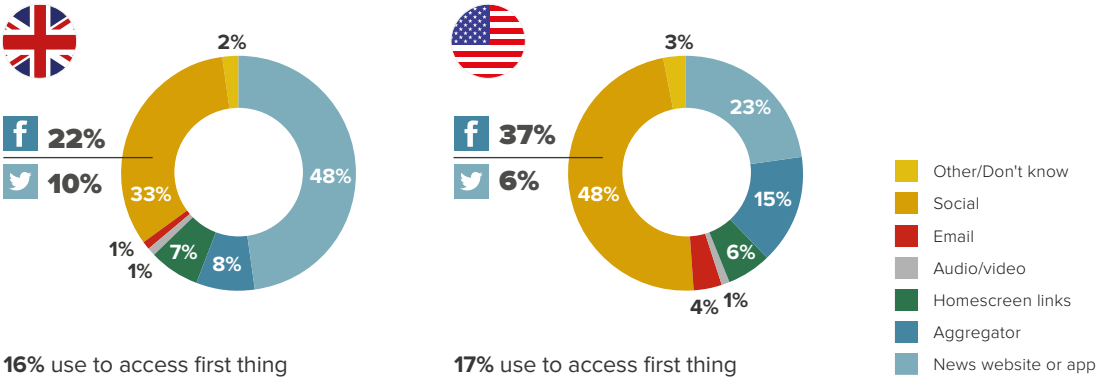
FIRST WAY OF ACCESSING NEWS (SELECTED COUNTRIES)



Q9c_new2016 What is the FIRST way you typically come across news in the morning? *Base:* Total sample in each country. *Note:* Due to rounding, total figures for each country do not always add up to exactly 100%, and combined figures for online access methods do not always add up to the total internet figure

For those who start their day with a smartphone, almost half in the US turn first to a social network like Facebook (37%) or Twitter (6%) with only a quarter (23%) going to a branded news app or website. In the UK it is a similar story around social media, though more people turn first to a website or app, perhaps because of the strong market position of the BBC.

FIRST NEWS SOURCE WHEN USING A SMARTPHONE (USA AND UK)



16% use to access first thing

17% use to access first thing

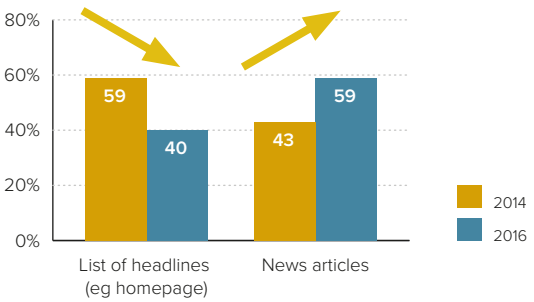
Q9d_2016. You mentioned that your FIRST contact with news in the morning is using smartphone, in which ONE of the following places do you typically find your first news? *Base:* All who use a smartphone for news first thing in the morning: UK = 302, US = 334

TYPES OF NEWS AND THE RISE OF VISUAL CONTENT

The move to mobile and distributed news has also affected the way in which news is packaged and displayed. Over the last few years we have seen fewer people tending to look at a list of news headlines, like the homepage of a website, with more going directly to articles and other news formats.

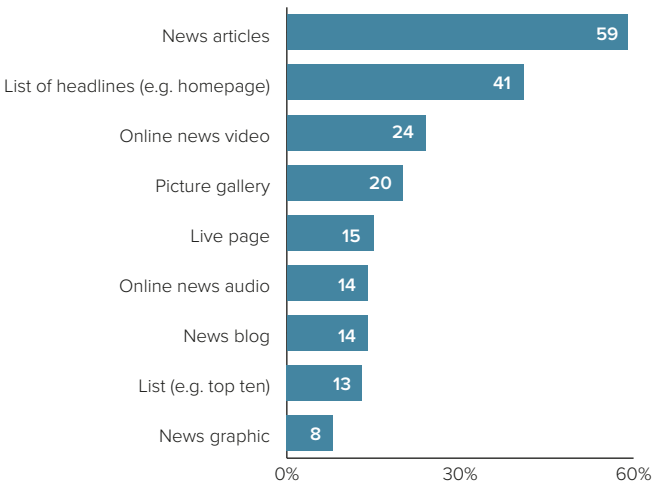
Looking at data across all our countries we find news articles are still the most consumed type of news content (59%), though we've seen the emergence of new formats such as live pages (15%), and Listicles (13%) as well as more visual formats such as picture stories (20%) and info graphics (8%). These formats are integrated into news websites but also play well in social media.

HOMEPAGES AND OTHER NEWS LISTS HAVE BECOME LESS IMPORTANT (UK)



Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? *Base:* Total 2014/2016 sample

TYPES OF NEWS CONTENT (ALL COUNTRIES)



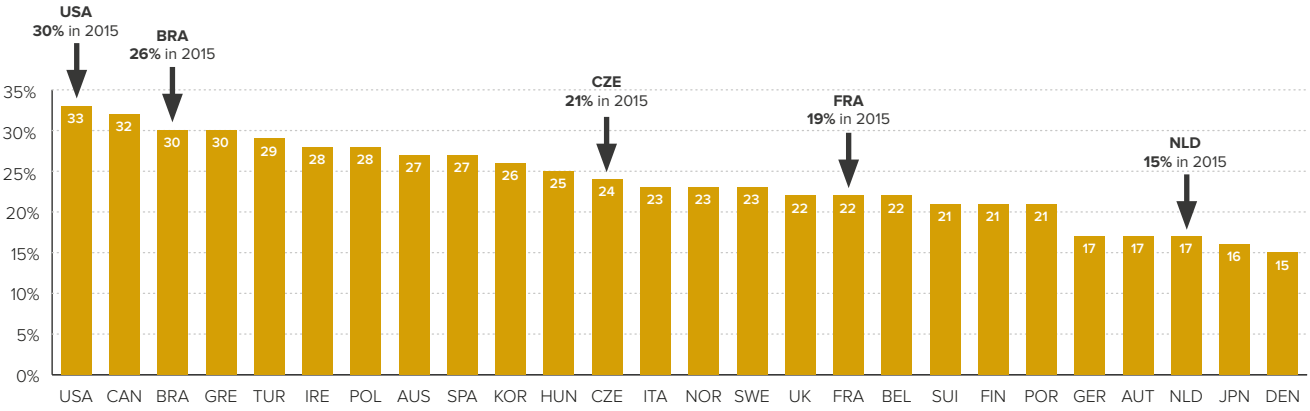
Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? *Base:* Total sample

VIDEO NEWS NOT GROWING AS FAST AS EXPECTED

One surprise in this year's data is that online news video appears to be growing more slowly than might be expected. Across all 26 countries only a quarter (24%) of respondents say they access online news video in a given week. This represents surprisingly weak growth given the explosive growth and prominence on the supply side.

Video consumption is highest in the United States (33%), where there has been significant ramp up in production by many news organisations – attracted by higher advertising premiums and better distribution opportunities in social media. By contrast, our weighted European average shows that less than a quarter (22%) are using video news in a given week with some of the lowest levels in Denmark (15%) and the Netherlands (17%).

WEEKLY VIDEO NEWS CONSUMPTION BY COUNTRY

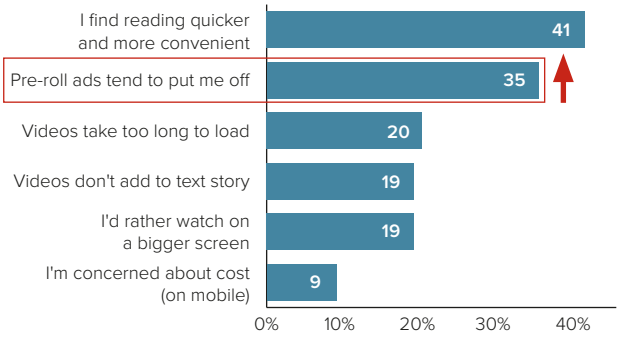


Q11. Thinking of the way you looked at news online in the last week which of the following ways of consuming news did you use? *Base:* Total sample in each country

Across our entire sample, the vast majority (78%) say they only read news in text or *occasionally* watch news video that looks interesting. Just one in twenty (5%) say they mostly watch rather than read news online. When pressed, the main reason people give for not using more video is that they find text quicker and more convenient (41%). Around a fifth (19%) say that videos often don't add anything to what is already in the text story.

We also find a significant proportion (35%) that say they are put off by pre-roll advertisements and this figure has increased in a number of countries this year including the United States, France, Finland and the UK.

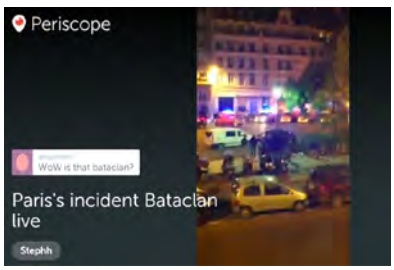
MAIN BARRIERS TO USING NEWS VIDEO (ALL COUNTRIES)



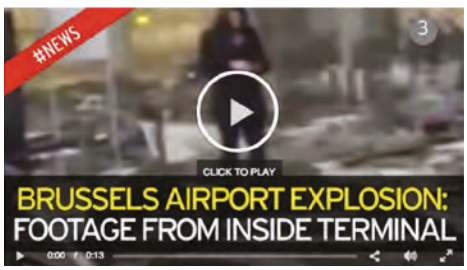
Q11ai. You said that you don't usually watch news videos online. Why not? *Base:* All who did not watch an online news video in the last week: All countries = 40582

VIDEO CONSUMPTION IS BECOMING MORE DISTRIBUTED

Much of the growth in news video consumption has come through social networks in the last year. Facebook in particular has increased the prominence of video in its newsfeeds – and pioneered autoplay functionality – with the company reporting 8 billion daily video views by November 2015[9] as a result. New live streaming services have also played their part in major stories. Twitter's Periscope was widely used during the Paris and Brussels attacks. Facebook Live is also now available.





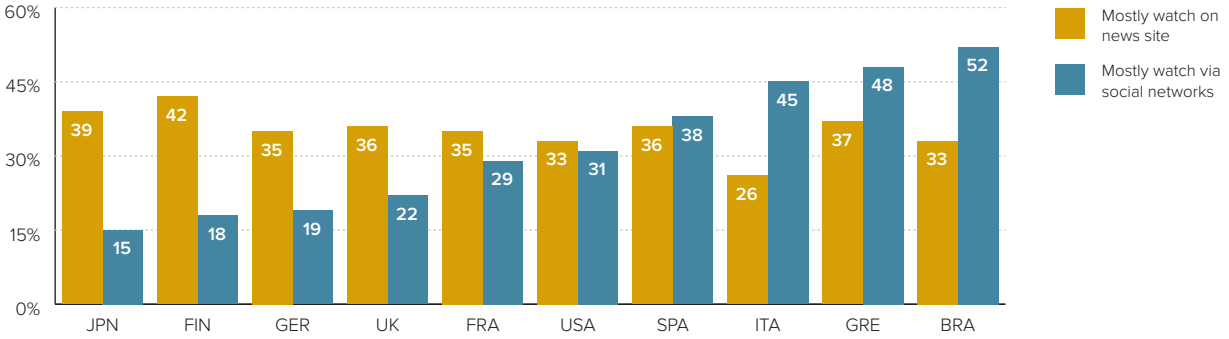


[9] http://techcrunch.com/2015/11/04/facebook-video-views – NB Facebook register a 'view' after three seconds.

A key question for the industry is the extent to which news video is still being consumed directly on news websites or whether it is now mainly consumed within social networks like Facebook, YouTube, Twitter, Instagram or Snapchat.

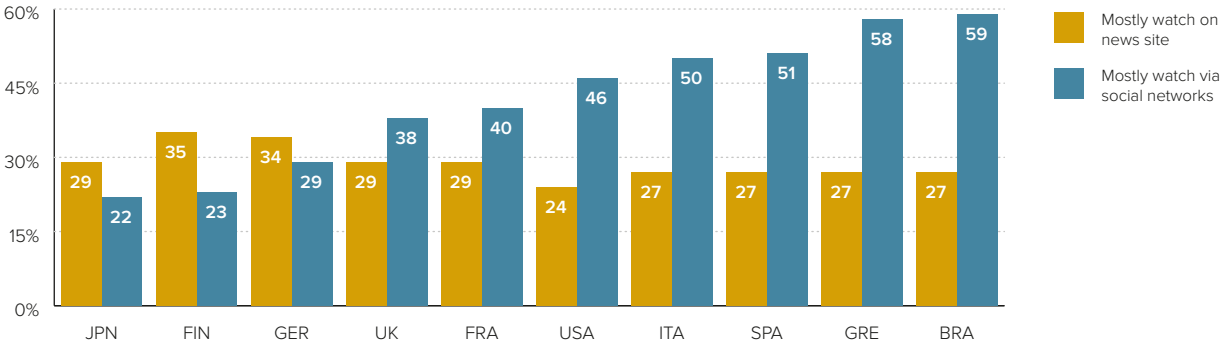
Across countries, we find a pretty even split between the two, with countries that are particularly active in social media like Brazil (52%) and Greece (48%) consuming more news video this way. We also find the under-35s are often much more likely to consume news video through social networks than the population as a whole (see charts below). Even in countries that tend to be less active in social media like Japan, Finland, and Germany, the amount of offsite video consumption is significant. Video formats are now at the heart of the distributed content revolution.

ON-SITE VS SOCIAL VIDEO CONSUMPTION (ALL AGES) SELECTED COUNTRIES



Q11E. Which of the following statements best matches your consumption of online news video? *Base:* Total sample in each country

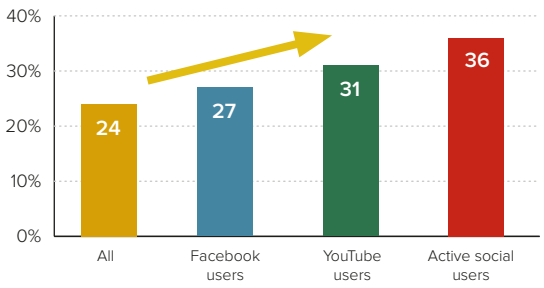
ON-SITE VS SOCIAL VIDEO CONSUMPTION (U35s) SELECTED COUNTRIES



Q11E. Which of the following statements best matches your consumption of online news video? *Base:* Under 35s (around 400 in each country)

In general we also find that most video is still consumed on computers, though this varies across countries and between generations. Younger users do access more video via the smartphone but only to the extent that they use these devices more anyway. On the other hand, we do see a key correlation with social media use. Heavy social media users in particular are around 50% more likely to access online news videos than the general population.

SOCIAL MEDIA USERS ARE MORE LIKELY TO USE NEWS VIDEO



Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? *Base:* Total sample/ Facebook users/YouTube users/ Active social users: All countries = 53227/35606/30649/16816. *Note:* Active social users are defined as 'proactive participators' (see p. 101)

ELUSIVE BUSINESS MODELS AND THE RISE OF AD-BLOCKING

Although online has enabled many publishers to reach more people than ever before, the business models around digital remain extremely challenging. This year's country pages are full of stories of traditional media companies laying off staff in the light of sharp declines in print revenue and continuing problems in monetising audiences online.

In the UK, the *Independent* has abandoned print entirely, shedding around 75 jobs in the process while the *Guardian* had a particularly difficult year, losing around £50m.[10] News Corp Australia and Fairfax newspapers combined have announced more than 200 editorial staff cuts over the past 12 months, while there have been changes of ownership or significant media consolidation in France, Italy and Poland amongst others.

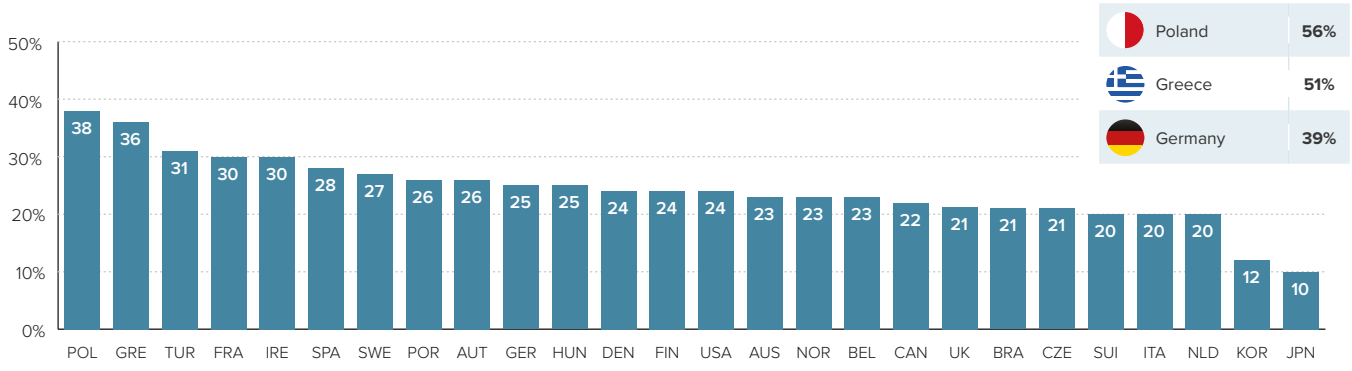
Digital born companies have also increasingly been affected by the same trends with BuzzFeed reportedly missing revenue targets[11] and Mashable amongst others laying off staff.

For more see section 2: Analysis by Country, p. 30.

Hardest hit have been publishers who depend on digital advertising revenue, which has weakened due to (a) the move to smaller mobile screens (b) the market power of Facebook and Google and (c) the rise of ad-blocking.

According to our data, ad-blocking is running at between 10% (Japan) and 38% (Poland), but much higher amongst under-35s. Most of those who have ever downloaded a blocker are using them regularly, suggesting that once downloaded they rarely go back.

WIDESPREAD USE OF AD-BLOCKING ACROSS MARKETS



U35 AD-BLOCKING

Poland	56%
Greece	51%
Germany	39%

QAD3. And do you currently use software on any of your personal devices (e.g. laptop, smartphone etc.) that allows you to block adverts on the internet (e.g. Adblock Plus)?
Base: Total sample in each country

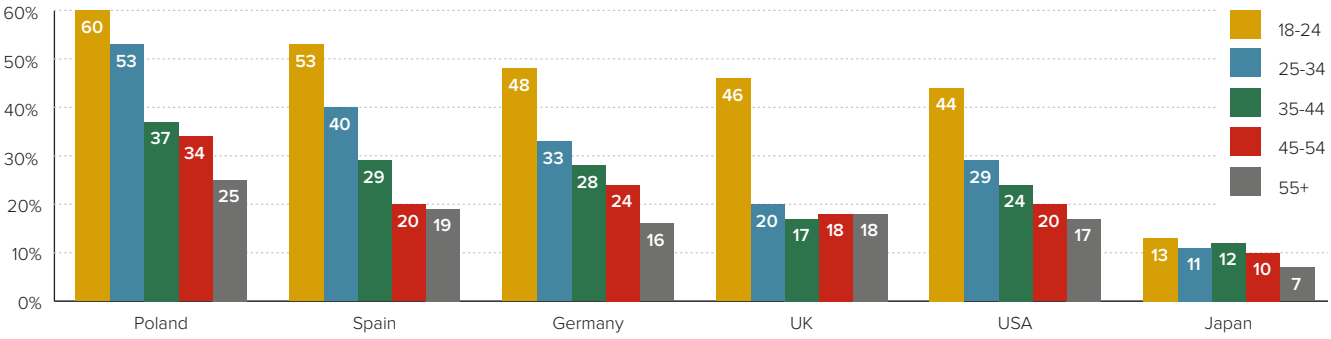
Of those that currently use an ad-blocker, the vast majority do so on their laptop or desktop computer. Across our entire sample, only around one in ten (8%) block adverts using their smartphone. However, these numbers may increase with ad-blocking apps and browsers now available for Apple and Android phones. Around a third of our sample say they plan to install an ad-blocker on their smartphones in the next year (this question was asked in Germany, UK, and US only).

A number of publishers have tried requesting readers to turn ad-blockers off while others are going further. Publishers in Sweden, one of the worst affected countries (27%) plan to collectively block all content to those using ad-blockers – offering a choice instead of one-off payments.[12] But the fact that many blockers are young, technically savvy, and have low trust in news organisations may make such initiatives difficult to pull off.

Ad-blocking is highest with the young and with those who use the news most heavily. In countries where ad-blocking is particularly common – such as Poland and Spain – a majority of 18–24 year olds now block adverts. In every country, ad-blocking becomes slightly less common with each increase in age bracket.

[10] http://www.theguardian.com/media/2016/jan/25/guardian-news-media-to-cut-running-costs
[11] *Financial Times*, 'Buzzfeed misses revenue targets': http://www.ft.com/cms/s/0%2F26ebf992-00c4-11e6-99cb-83242733f755.html
[12] Digiday, 'Sweden's publishers join forces to block ad-block users': http://digiday.com/publishers/swedens-publishers-gearing-block-ad-blockers

PROPORTION WITHIN EACH AGE GROUP THAT CURRENTLY USE AD-BLOCKING



QAD3. And do you **currently** use software on any of your personal devices (e.g. laptop, smartphone etc.) that allows you to block adverts on the internet (e.g. Adblock Plus)? *Base:* 18-24s/25-34s/35-44s/45-54s/55+: Poland = 247/423/344/303/683, Spain = 182/457/420/355/690, Germany = 183/301/306/400/845, UK = 220/206/293/400/905, US = 175/329/377/300/1016, Japan = 197/284/320/315/895

There is not one single reason for ad-blocking. Mostly it reflects unhappiness with the volume and distracting nature of advertising but there are strong privacy concerns in the Netherlands and Spain. Only around one in ten is worried about the impact of advertisements on data plans or battery life on their smartphones.

REASONS FOR AD-BLOCKING (SELECTED COUNTRIES)

	USA	UK	GER	FRA	SPA	POL	CAN	POR	NLD	CZE
I was fed up with the volume and distracting nature of advertisements in general	68%	74%	64%	65%	50%	65%	60%	58%	48%	75%
I dislike ads that follow me around from one site to another (privacy concerns)	55%	56%	57%	51%	52%	43%	52%	56%	64%	41%
To improve the speed at which pages load	50%	42%	38%	39%	40%	40%	48%	41%	37%	39%
So I don't use as much data on my mobile phone plan	10%	9%	14%	9%	17%	15%	15%	13%	11%	13%
To save battery life	13%	11%	13%	12%	14%	13%	19%	12%	12%	10%

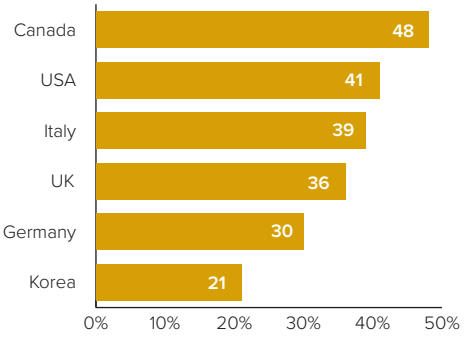
QAD3ai. Which of the following reasons caused you to install an adblocker? *Base:* All who currently use an adblocker: US = 596, UK = 560, Germany = 649, France = 746, Spain = 736, Poland = 857, Canada = 538, Portugal = 597, Netherlands = 527, Czech Republic = 538

With existing models of online advertising increasingly broken, publishers have renewed their focus on alternative forms such as branded and sponsored content. A number of publishers have set up internal agencies that create content for brands, often using the same formats, fonts and templates as other editorial content. This content may take the form of a list, a video or a microsite. At other times it takes the form of links to branded content from 'around the web' provided by companies like Outbrain and Taboola.[13]

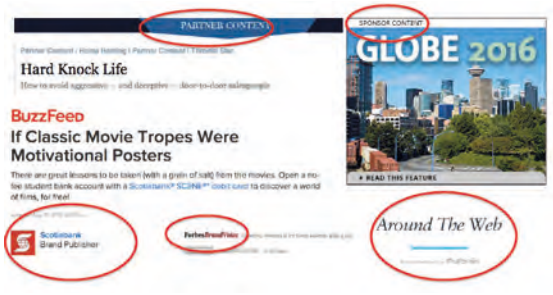
Sponsored content and its labelling is still an emerging area with much room for confusion. In looking at six countries where the practice is most prevalent, we find consumers are most comfortable in Canada and the US and most resistant in Germany and Korea, where only a fifth (21%) agreed that the labelling was sufficiently clear and a third (32%) disagreed.

[13] Outbrain and Taboola are widely used content discovery platforms that help content producers and brands find audiences through modules that offer sponsored website links.

% THAT SAY LABELLING OF SPONSORED CONTENT IS CLEAR (SELECTED COUNTRIES)



Canadian examples of sponsored content

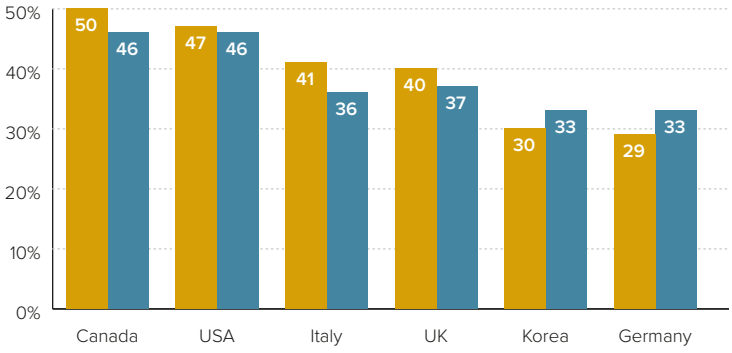


QSPONS1_2016: Thinking about sponsored or branded content in online news sites, to what extent to you agree with the following statements: The labelling of sponsored and branded content on news websites is simple and clear. *Base:* Total sample in each country

In these countries, we also compared attitudes to advertising on news websites in general with attitudes to sponsored and branded content. In North America, Italy and the UK there is slightly more acceptance of sponsored content than general display advertising but in Germany and Korea we find more negative attitudes to advertising in general and sponsored content in particular. In all countries, we find younger groups are more prepared to accept advertising for free news, which is surprising given they are also some of the heaviest users of ad blockers.

For more see essay 4.1: Mark Thompson, 'The Challenging New Economics of Journalism', p. 108.

SPONSORED CONTENT VS DISPLAY ADVERTISING (SELECTED COUNTRIES)



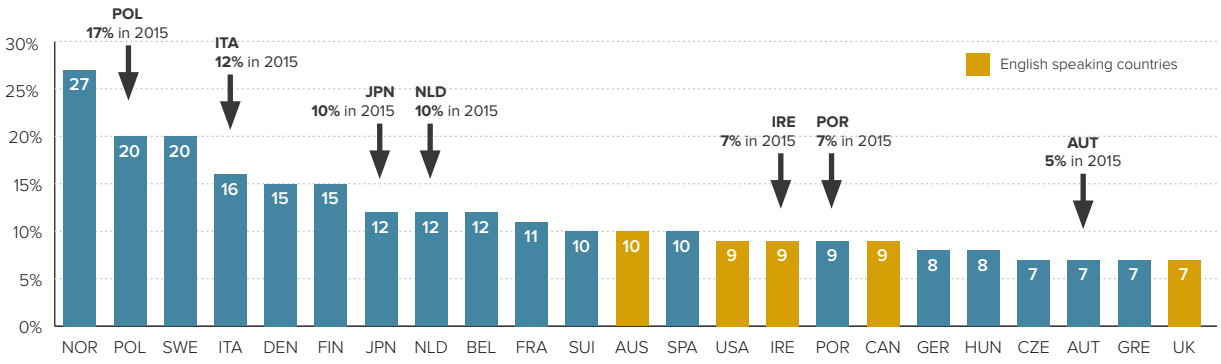
QAD1_2. Thinking about advertising on news websites or news apps, to what extent do you agree or disagree with the following statements: I am prepared to see advertisements in exchange for free news. **QSPONS1_2016_2:** Thinking about sponsored or branded content in online news sites, to what extent to you agree with the following statements: I am prepared to see sponsored or branded content in exchange for free news. *Base:* Total sample in each country

PROSPECTS FOR PAID CONTENT ONLINE

Whilst around 45% of our total sample pay for a printed newspaper at least once a week, it has been much harder to persuade readers to pay for general news online.

In the United States the percentage paying for any online news in the last year has fallen from 11% to 9% as some paid experiments reverted to free (*NYT* app) and some paywalls have been abandoned. In the UK too, some paywall strategies have been reversed (e.g. the *Sun*), whilst others have started focussing more on paid content via membership/premium content (the *Guardian*). The UK has one of the lowest levels of online payment (7%) along with Greece, Austria and the Czech Republic.

% THAT HAVE PAID (ANYTHING) FOR ONLINE NEWS IN THE LAST YEAR



Q7a. Have you paid for ONLINE news content, or accessed a paid-for ONLINE news service in the last year? (This could be digital subscription, combined digital/print subscription or one-off payment for an article or app or e-edition). *Base:* Total sample in each country

It is striking that no English-speaking country has a payment rate of more than 10% – likely to be a consequence of intense global competition for digital eyeballs. By contrast some smaller countries protected by geography or language have been able to achieve rates of 20% or more, particularly where there is tradition of newspaper subscription via home delivery to build on.

A strong online presence by a public service broadcaster does not necessarily seem to be a barrier to paying for online news. Norway, Sweden and Finland all have strong PSBs and high levels of payment. By contrast, the United States has no significant public broadcasting tradition but has relatively low levels of online payment.

Some counties like Italy show high headline percentages, but have relatively low numbers of digital subscriptions and higher rates of payment for single e-editions. The median reported annual payment for online news ranges from £9 in Poland to £36 in Germany and £82 in the UK – with generally higher yields in countries that have high levels of ongoing subscription.

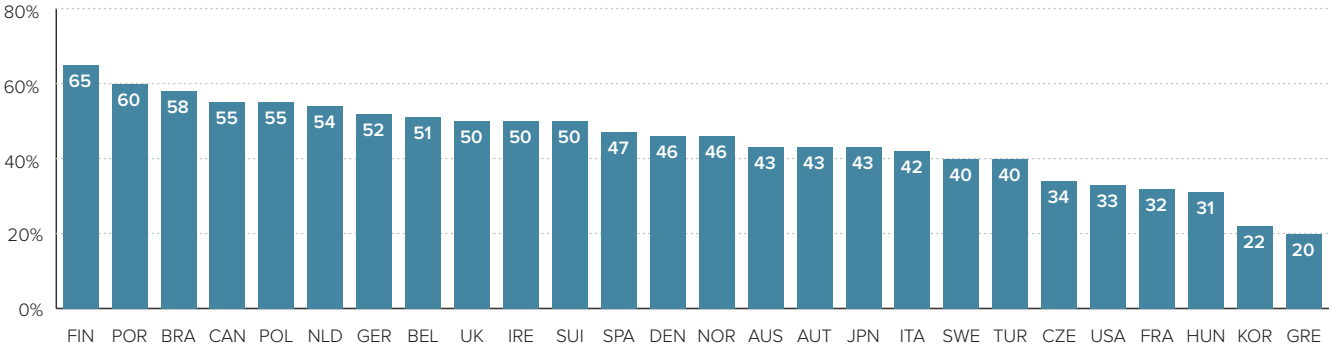
See analysis in section 3.9: Paying for Online News, p. 103.

THE IMPORTANCE OF TRUST IN NEWS PROVISION

This year we have explored in some detail the role of trust in general as well as specifically in news organisations and journalists. In addition to survey questions we held focus groups in four countries – the UK, US, Germany, and Spain – to understand more about some of the drivers for trusting or not trusting the news.

Overall we find a high level of variation in the extent to which news is trusted across our 26 countries. Typically, affluent Western European and Scandinavian countries with a mix of strong, well-funded public service broadcasters and commercial players scored highly. Trust is lower in the United States (33%) as well as in Southern European countries. In Greece, just one in five (20%) said that they trust the news, the lowest figure in 2016.

% THAT AGREE 'YOU CAN TRUST MOST NEWS MOST OF THE TIME'



Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statements?: I think you can trust most news most of the time. *Base:* Total sample in each country

In Greece, the economic crisis has seen a loss of faith in institutions in general and in news organisations across all sections of society – with a particular focus on the under-35s. Trust is also affected by perceptions of political influence over the media in countries like Turkey where the government has clamped down on opposition newspapers and in Hungary where the media is highly politicised; only 14% of our Hungarian respondents agreed that the media were independent from undue political or government influence most of the time, compared with an EU weighted average of 29%.

Business and commercial influence over the news is considered a strong factor in Greece, Hungary, the Czech Republic, Korea, and also the United States. In the US less than one in five (18%) agree with the notion that the news media are independent of business or commercial interests most of the time. Over half (51%) disagree.

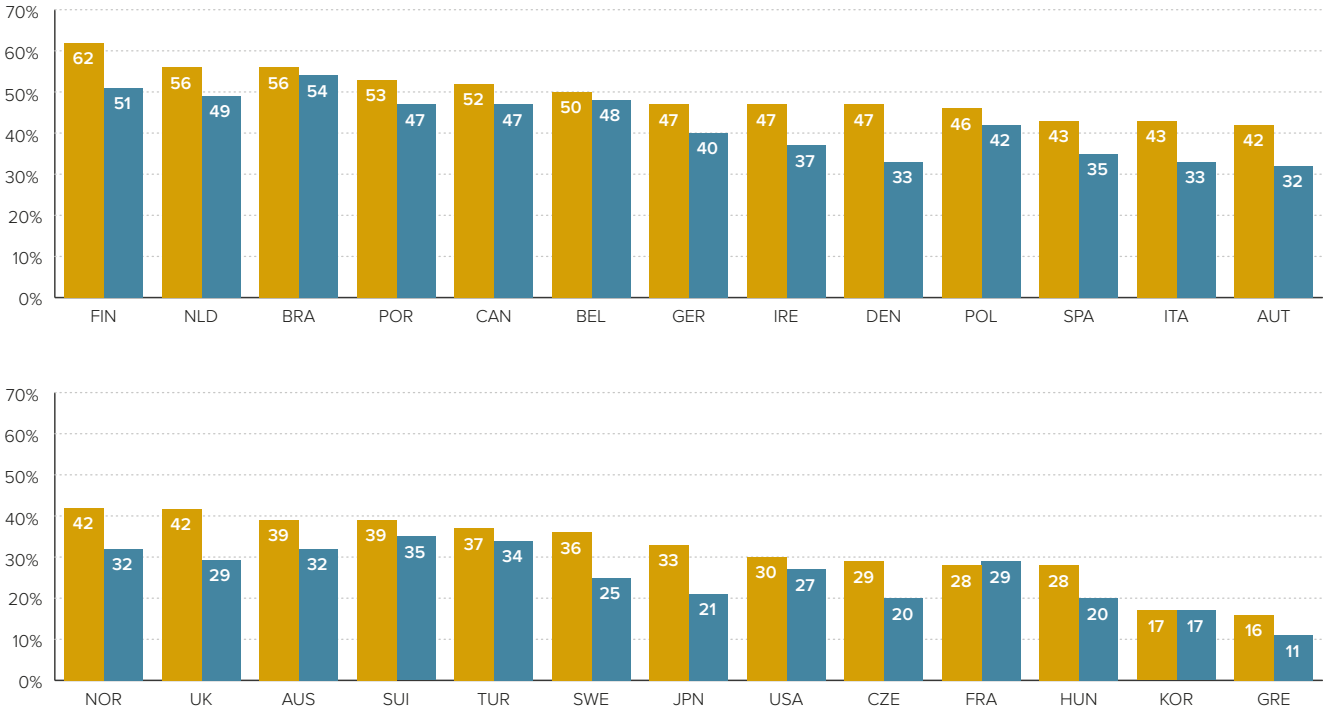
Also see section 3.6: Trust in the News in More Depth, p. 94.

NEWS ORGANISATIONS ARE THE KEY DRIVERS OF TRUST

Our data also show that news brands rather than journalists are the main way in which trust is delivered. Although online news has provided more opportunities for journalists to build their own profiles, interact with readers, and in some cases start their own businesses, established news brands continue to resonate most with readers everywhere – with the exception of France. Journalists carry a particularly low reputation in many countries such as the UK where there is a strong and vigorous tabloid press. Although headline trust levels are quite low, a wide range of research including our own in 2015 has shown that trust is much higher in sources that people actually use.

For more see essay 4.2: Ed Williams, 'Why Trust Matters', p. 110.

% THAT AGREE 'YOU CAN TRUST NEWS ORGANISATIONS/JOURNALISTS MOST OF THE TIME'

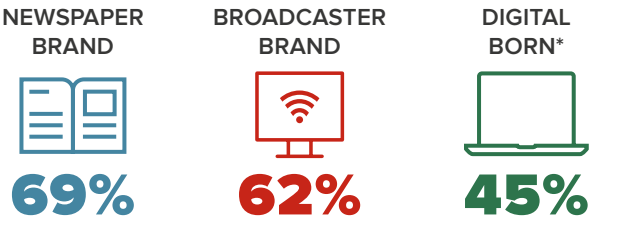


Q6_2016_2/3. Thinking about news in general, do you agree or disagree with the following statements?: I think you can trust most journalists most of the time/I think you can trust most news organisations most of the time. *Base:* Total sample in each country

THE CONTINUED IMPORTANCE OF TRADITIONAL MEDIA BRANDS

Our research suggests that even in the era of social media and atomised media, news organisations and traditional news brands still matter enormously.

Although aggregators and social media are important gateways to news, most of the content consumed still comes from newspaper groups, broadcasters, or digital born brands that have invested in original content. Across all of our 26 countries over two-thirds of our sample (69%) access a newspaper brand online each week, with almost as many (62%) accessing the online service of a broadcasting outlet.



Q5B. Which, if any, of the following have you used to access news in the last week?
Base: Total sample
*Digital born brands like Buzzfeed and Huffington Post that produce their own content

Second-wave digital-born brands like BuzzFeed and the Huffington Post are growing in reach in many countries around the world, but when asked about their MAIN news source, respondents everywhere were much more likely to turn to a brand with a track record for serious news. This point was also a strong theme in our focus groups:

? *So do these news brands still matter then?*

M *Yeah.*

F *Yeah.*

? And in the future they'll still matter?

F *I would be disappointed if they didn't because then how do we know if we're getting accurate information or not.*

M *I still think brand matters, I still think you go to the more reputable ones by far, I don't think that's going to change.*

% OF TOTAL SAMPLE USING SPECIFIC BRANDS AS THEIR MAIN SOURCE OF ONLINE NEWS (SELECTED COUNTRIES)

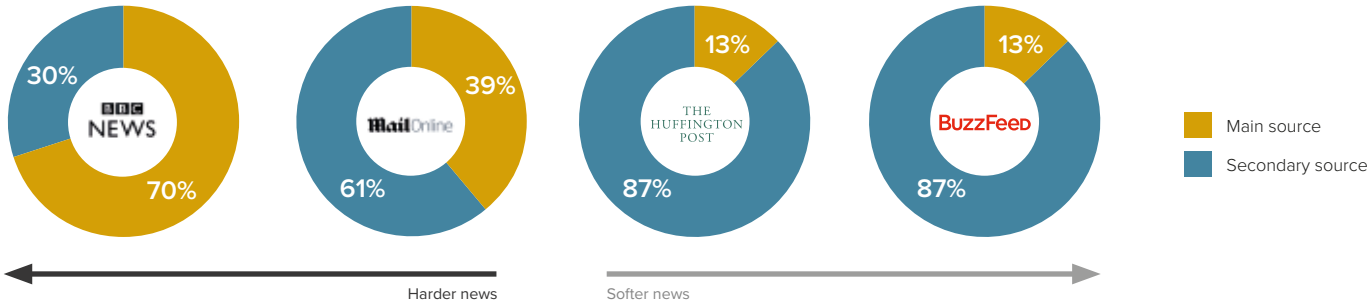
UK		JAP		ITA		NOR		USA	
BBC	36%	Yahoo News	49%	La Repubblica	11%	VG Nett	25%	Yahoo News	12%
MailOnline	7%	NHK	5%	TGCOM	10%	NRK	15%	Fox News	10%
Sky News	5%	Nikkei	4%	La Stampa	6%	Aftenposten	7%	CNN	6%

Q5e. Overall, which is your MAIN source of news when accessing using **online platforms**? *Base:* Total sample in each country. *Note:* Those who did not use an online news source in the last week are recorded as having no main online news source.

Taking the UK as an example, over a third (36%) of the entire sample say the BBC News website or app is their main source of news. That's more than two-thirds (70%) of those that use the BBC each week. By contrast only a small percentage of BuzzFeed (13%) or Huffington Post users (13%) say they are their main source in the UK.

> "You kind of like have a serious news source and then the sort of guilty pleasure sources."
> *(20–34 year old, UK Focus Group)*

% OF THOSE USING SELECTED ONLINE BRANDS WHO SAY IT IS THEIR MAIN SOURCE



Q5b. Which, if any, of the following have you used to access news in the last week? **Q5e.** Overall, which is your MAIN source of news when accessing using **online platforms**?
Base: All who used BBC/Mail Online/Huffington Post/BuzzFeed as a source of news online in the last week: UK = 1101/347/337/183

Of course this is a complex picture where many digital-born brands, like Quartz, Politico, or Mediapart in France, are also in the business of providing serious news but to niche audiences.

We also find that some aggregator brands like Yahoo News in Japan, Yahoo in the United States, and Naver in Korea are relied on as a main source of news by a significant number of people. By carrying high-quality content where the source is not always noticed, it appears that – over time – these brands have managed to acquire their own credibility as a news source.

Individual brands clearly have different strengths and roles in the ecosystem – across types of news, stages of news story evolution, times of the day, and across different platforms. Traditional brands tend to act as anchors or starting points; native digital brands tend to act as supplementary sources or may help entertain in the downtime.

COUNTRY-BASED DIFFERENCES IN DIGITAL ADOPTION

As in previous years, we find significant differences across our 26 countries both in terms of the type of news brands that people prefer and the way they access them. Germany and France exhibit the most traditional behaviours with strong continuing preference for TV, radio, and print. By contrast, Korea, Norway, and Sweden have a strongly digital outlook, but traditional media remain both well used and valued.

Greece is in a sense the most digital, but low internet penetration here may be partly responsible for this result as online polls will tend to underplay the strength of TV, radio, and print. Even so, many Greeks have lost trust in traditional media and have been putting their faith in online sites, blogs, and social media instead.

This year's survey also covers more small countries and three multilingual countries where consumption and media habits are strongly influenced by larger neighbours. Canadian and Irish media companies looking to charge for general news have to cope with strong competition from the US and UK respectively, while German media have also been looking for new markets in Austria and Switzerland. The media systems in both Switzerland and Belgium are particularly complex, subdivided by language with strong cross-border influences.

These differences act as a counter to theories of technological determinism. Culture, habit, geography, regulation, history, company strategies all play their part in how fast or slow digital technologies – and business models – are adopted in any particular country.

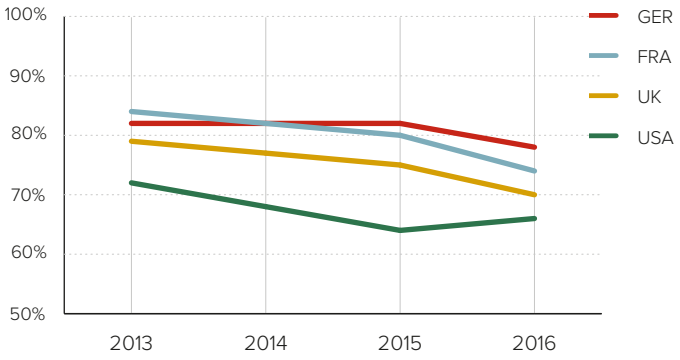
For more see section 3.1: Sources of News, p. 86, and section 3.2: Segmentation across and within Countries, p. 87.

TELEVISION NEWS LOSING YOUNGER VIEWERS

As we've already noted above, we also find strong generational differences in the sources and platforms being used for news. Traditional platforms like TV remain preferred sources for older generations, but are losing traction with the young in most countries.

Over the last three years, the percentage of under-35s who say they access TV bulletins or 24-hour news channels has fallen significantly in the UK and France (around 20 points) and to a slightly lesser extent in the United States and Germany.

ACCESS TO TV NEWS 2013–16 (SELECTED COUNTRIES)



Fall in TV news viewing by under 35s (2013-16)

	GER	FRA	UK	USA
2013	70%	81%	63%	55%
2016	64%	61%	42%	44%
Difference	**-6**	**-20**	**-21**	**-11**

Q3. Which, if any, of the following have you used in the last week as a source of news? *Base:* Total sample 2013-2016 sample in each country. *Note:* 2014 data has been estimated because of an issue with randomisation of news sources in the questionnaire

TV news tends to be more important in Europe with its tradition of strong public service broadcasters than in the United States. However, our data do show a slight increase in the US this year, where our polling was done in the week of the Ohio Caucus as the presidential campaign began to hit its stride.

More generally, the rise of the video-enabled internet and the distribution of breaking news through social networks and smartphones is starting to provide alternatives to 24-hour news channels. Al-Jazeera America closed its doors in April 2016 in order to focus its resources on online and mobile channels, while some other established players are contemplating following suit.[14]

CONCLUSIONS

There are two contradictory but important messages in this year's data. On the one hand we see publishers losing control of distribution, some consumers not noticing where content comes from, and the growing influence of platforms and algorithms. And yet at the same time we find, both in our survey data and our qualitative work, that people still want, value, and identify with traditional news brands.

So how to explain these contradictions? Much probably relates to individual context, to the type of news, or to our often-complex relationship with a particular brand. More of us are accessing news across multiple platforms, through aggregators and social networks, but finding the signal from the noise can be time-consuming and confusing. News brands can help consumers navigate this landscape but to succeed they will need to (a) deliver consistently with a strong audience focus, (b) have a clear identity that matches the content proposition, and (c) excel at distribution in a fast-changing environment.

Social networks and aggregators recognise they need this high-quality content to attract audiences to come back more regularly. At the same time publishers want access to the enormous global audiences that have been built up and fair recompense for the investment they have made in original news content. The key challenge is how to find and maintain an appropriate balance between destination and distribution, between risk and reward.

Whilst some publishers like the *Washington Post* have gone 'all-in' with Facebook Instant Articles, most publishers recognise they will need to ride two horses – investing also in websites and apps where loyal audiences can be nurtured and ultimately monetised.

Driving revenues from online content has become the most critical issue for publishers, particularly those coming from a print background. But the moves to distributed content outlined in this report, the difficult economics of mobile, and the growth of ad-blocking seem to be making sustainable business models more elusive than ever.

As in previous years we see the uneven nature of digital change both across generations and within countries. We see how some countries are protected to a degree by culture, language, or regulation, while others face the full force of digital competition. We see everywhere how young people consume the news differently, with a focus on mobile and social media.

It's hard to know how far – or how fast – the shift to distributed media will go, but this feels like the beginning of a new phase of media disruption. News organisations will need to keep adapting to the changes ahead – whilst recognising that journalistic track record, trust, and brand equity will remain necessary if not sufficient ingredients of success.

[14] *Guardian*, 'BBC considers replacing news channel with mobile streaming': http://www.theguardian.com/media/2015/aug/26/bbc-considers-replacing-news-24-with-mobile-streaming-service

ANALYSIS BY COUNTRY

In this section we publish a *country-based* view of the findings, which includes a brief overview of media characteristics and the most important data points in terms of digital news.

This includes an overview of consumption in each country, including details of the most popular news brands – traditional and online. The pages also contain statistics about the use of new devices such as smartphones and tablets and the role of different social networks for news. Information is drawn from the 2016 *Digital News Report* survey using the methodology outlined on p. 6, with the exception of population and internet levels which are drawn from *Internet World Statistics* (2015). In the case of Poland, Czech Republic, Austria, Netherlands, Turkey, and Portugal comparative data, where referenced, comes from the *Supplementary Digital News Report 2015*. Where appropriate, our country-based authors have also referenced industry statistics that supplement our survey-based approach. Some historic data for sources of news in 2014 has been adjusted following an error in randomising question options. Brand data in Turkey, Italy, South Korea, and Japan are drawn from a re-poll in March/April 2016 with a slightly smaller sample (around 1,000 in each country).

Whilst most of our countries see internet penetration of 80% or more, Italy, Brazil, and Turkey in particular have far lower levels of access. In those countries we are looking at the habits of around (or less than) half the adult population. It should also be noted that the Brazilian and Turkish samples are urban-based samples (and skew far younger, with roughly half the proportion of over-55s compared to the other countries surveyed). Many international comparisons will still be relevant in terms of understanding differences in the online sphere, but anyone interpreting these results should be careful not to suggest these figures represent the total adult population, especially when considering offline versus online consumption.

The full questionnaire, additional charts and tables plus the raw data are available from our website www.digitalnewsreport.org.

2.1 United States 32
2.2 UK 34
2.3 Germany 36
2.4 France 38
2.5 Italy 40
2.6 Spain 42
2.7 Portugal 44
2.8 Ireland 46
2.9 Norway 48
2.10 Sweden 50
2.11 Finland 52
2.12 Denmark 54
2.13 Belgium 56
2.14 Netherlands 58
2.15 Switzerland 60
2.16 Austria 62
2.17 Hungary 64
2.18 Czech Republic 66
2.19 Poland 68
2.20 Greece 70
2.21 Turkey 72
2.22 South Korea 74
2.23 Japan 76
2.24 Australia 78
2.25 Canada 80
2.26 Brazil 82

UNITED STATES

The US media environment is highly commercial, highly competitive, and increasingly fragmented – with a diverse set of legacy publishers increasingly challenged by newer digital outlets.

STATISTICS

Pop	**321m**
Internet penetration	**87%**



News and journalism have never been more popular or more difficult to monetise - with platforms run by Silicon Valley technology giants playing an increasing powerful role. Snapchat launched its Discover channels in the United States last year, providing a new distribution outlet for brands like Vice, BuzzFeed, the *Wall Street Journal* and *Cosmopolitan*. The *New York Times* and the *Washington Post* were early participants in Facebook's Instant Articles initiative, now opened up to all publishers. Apple News launched a revamped app in June as a showcase for publishers and Google's initiatives included the Accelerated Mobile Pages (AMP).

All this comes against a background of greater use of both smartphones and social media – with almost half of respondents in the United States (46%) now using social networks as a source of news. Facebook is by far and away the most important platform for news, both individually and corporately, as it also owns Instagram and WhatsApp.

Local journalism continues to decline, with the *Los Angeles Times* and other Tribune papers experiencing more severe cuts to editorial staff. In April 2016 Gannett offered $815m for Tribune Co, which would represent major consolidation in the local market. The issues of scale introduced by digital advertising have been especially challenging at local level. Three Philadelphia media groups – the *Inquirer*, the *Daily News*, and news website Philly.com – were all put into a non-profit trust with the intention that this would allow both preservation and experimentation.

At the other end of the scale, American publishers sought to dramatically expand their international digital footprints. BuzzFeed launched more international editions, but also missed its 2015 revenue targets by a large margin.[15] The *New York Times* launched a Spanish edition – The *New York Times en Español* – in February 2016 while increasing subscriptions by 20% at home. The *NYT* also announced it would be investing $50m in the European market where online Washington-based Politico had also expanded with a bureau in April 2015. Both legacy brands and digital outlets alike grew their in-house design and advertising studios despite widespread scepticism about the robustness of native advertising, which now represents 22% of the online display market.

Vice launched Viceland, its own cable television channel, while both Vox and BuzzFeed have expanded into video following further investments from NBC Universal. Mashable laid off journalists, cutting international and political news as part of a strategic shift towards video.[16] This push by digital media companies into television is in one sense surprising with the evidence that young people are watching less. On the other hand television companies are still generating substantial revenues and investing in digital native outlets is seen as one way of hedging against future disruption. Cable channel valuations have been hit by growing competition from streaming services like Netflix. Al Jazeera America closed in April 2016, but mobile focused AJ+ continues to thrive.

Some new digital outlets like the Marshall Project, The Intercept, and Reported.ly continued to grow, hiring journalists and editors and winning awards and legitimacy with their peers. International publishers continued to seek a presence in the US, for instance Axel Springer bought Business Insider for $442 million in November 2015.

Overall the message from American news journalism was one of dramatic change. Legacy print media and digital native newsrooms alike are seeking to disrupt the TV market as advertising drains away from pageviews and text-based formats. Television companies are seeking to escape the same fate as print by investing in new digital native brands and the unprofitable heartland of investigative and local news is seeking to remove itself from the market completely with non-profit funding models and broad-based alliances. Lurking beneath all of this is an ecosystem where Facebook, Google, Apple, and Amazon control the advertising and technological environment.

Emily Bell and Smitha Khorana
Tow Center, Columbia Journalism School

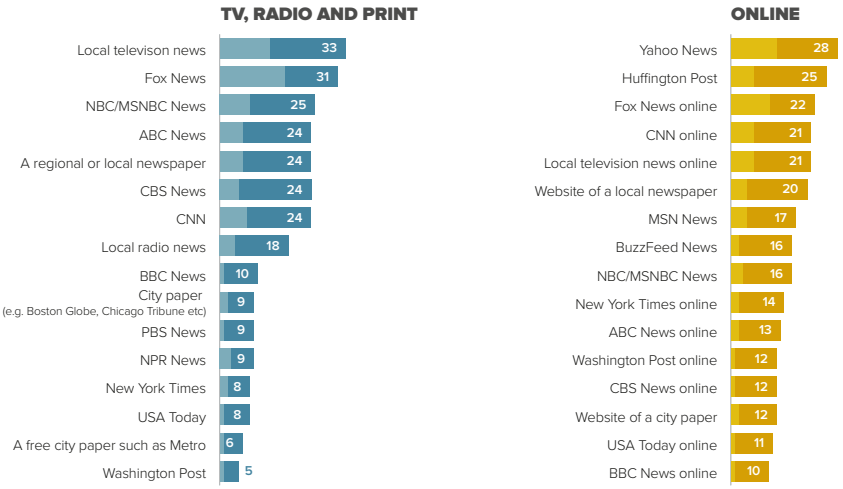
[15] *FT*, 'Buzzfeed slashes forecasts after missing revenue targets' (16 Apr.).

[16] http://www.adweek.com/news/television/mashable-staffers-laid-site-pushes-further-video-170669

TOP BRANDS

% Weekly usage

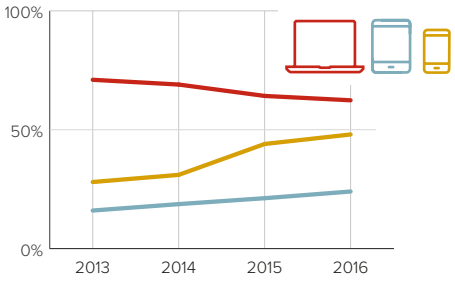
- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*



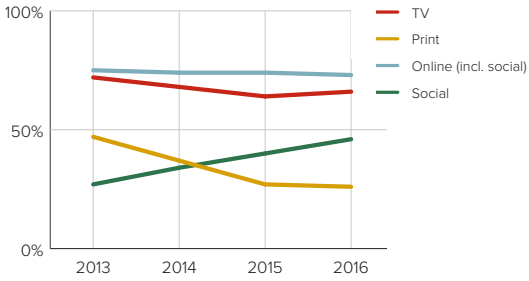
CHANGES IN MEDIA USAGE 2013–2016

Print newspapers in the US have been hit hard by falling circulation and advertising. Online competition is fierce with social media use up from 27% to 46% in three years.

WEEKLY REACH PER DEVICE



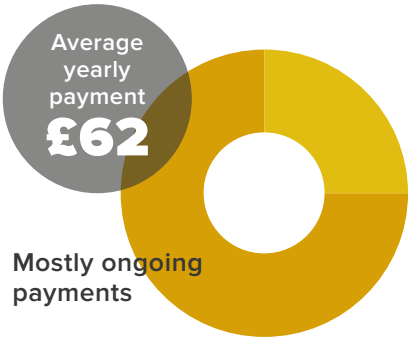
SOURCE OF NEWS 2013–16



PAYING FOR NEWS

The headline percentage is down 2 points from last year with some newspapers abandoning paywalls and paid apps. But most of those paying have an ongoing subscription.

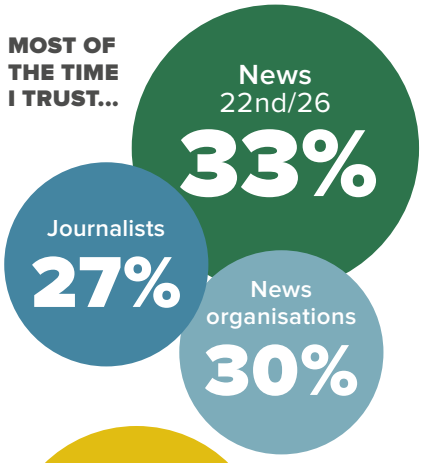
PAY **9%** pay for online news
(=16th/26 countries)



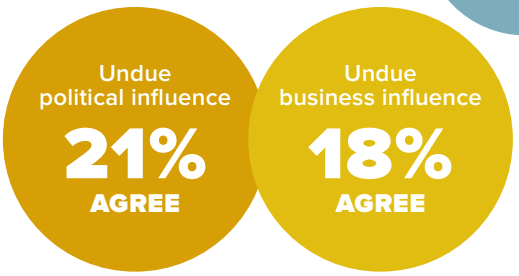
TRUST

As political polarisation has increased in the run-up to the 2016 election, trust in the media has become a major issue for citizens. There is an increasingly fragmented media landscape – to the extent that critiques of 'the media' have become a central part of the Republican platform for certain candidates.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



AD BLOCKERS



24%
use ad blockers.
(=12th/26 countries)
35% under 35.

TOP SOCIAL NETWORKS*

RANK		NETWORK	ALL	U35s
1		Facebook	45%	51%
2		YouTube	19%	24%
3		Twitter	10%	15%
4		Instagram	4%	8%
5		LinkedIn	3%	3%

*used weekly for news

UNITED KINGDOM

The media environment is characterised by a strong public broadcaster (the BBC) and by a vigorous and highly competitive national press – including a strong tabloid sector.

STATISTICS

Pop	**65m**
Internet penetration	**92%**



Over the last year the newspaper sector has been hit hard by a sharp fall in print advertising, by the growth of ad-blockers, and by problems of monetising content on mobile devices.

The *Guardian*, which recently expanded operations to the US and Australia, increased operating losses to almost £50m in the year to March and has announced plans to cut 20% of its cost base. The 30-year-old *Independent* became the first UK national newspaper to stop the presses and go 'online only', with the loss of around 75 jobs. Meanwhile, Mail Online, which claims to be the world's most visited English-language website, missed revenue targets by £7m and remains loss-making.[17]

Trinity Mirror closed digital spin-offs and consolidated its position in regional news by acquiring rival publisher Local World. Johnston Press, owner of *The Scotsman* along with more than 200 regional titles, bought the profitable 'i' newspaper from the *Independent* for £24m but suffered sharp falls in print circulation and advertising in its core business and is reported to be considering selling newspapers to pay off heavy debts. It has laid off hundreds of journalists since 2009.[18]

By contrast, the fortunes of some news organisations that have been relying on paid content are looking up. A new access model based on paid online trials helped the *Financial Times* grow 8% to 780,000 paid subscribers, of whom 566,000 subscribe to a digital platform. In July 2015, the *FT* was sold to Nikkei, Japan's largest media company for £844m.

The Times returned to profit for the first time since 2002 (£21m operating profit in the year to June 2015) and has attracted around 150,000 paid digital subscriptions (-6%).[19] Growing or even maintaining this base is proving a challenging process and *The Times* has started publishing limited free content in Apple News and a cheaper international app to try to attract new customers. Meanwhile the mass-market *Sun* newspaper, also owned by Rupert Murdoch's News UK, abandoned its online paywall experiment in November after too few people (around 200,000) signed up for its £7.99 a month subscription.

The BBC has faced a difficult year following pressure from print publishers over its size and scope and a quick-fix deal with the government to pay for free licence fees for the over-75s from within a fixed income, amounting to a considerable cut in funding for its services. Its news division is implementing cuts of £5m, with the likelihood of that increasing to £80m over the next 4 years.[20]

Despite this, the BBC remains one of Europe's most successful public broadcasters (PSBs) with impressive weekly reach online (51%) and via TV and radio (66%). Most of the BBC's online users (70%) also say BBC News is their main source of online news, dwarfing other providers. The BBC is experimenting with short form and social video formats and publishing content via Apple News and Facebook's Instant Articles.

Digital-born media brands are beginning to make more impact in the UK. BuzzFeed UK (+5) has expanded its news operation, poaching Janine Gibson and other key staff from the *Guardian*. Its investigative team broke a major story around match fixing in tennis, in a historic partnership with the BBC. The Huffington Post (+2) continues to build audiences in the UK and now beats all newspapers apart from the *Mail* and the *Guardian* in terms of online reach. Lad Bible (4%) is a new entrant in digital news with a light-hearted content mix aimed at young men.

Nic Newman
Research Associate, Reuters Institute

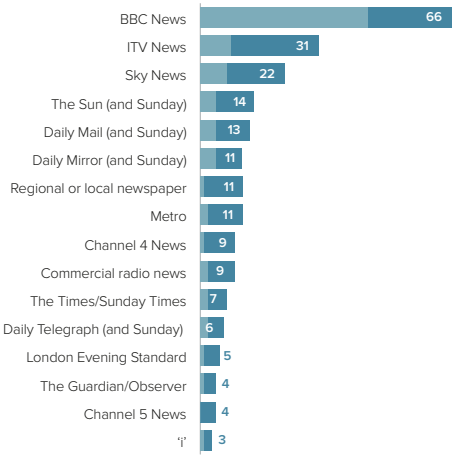
[17] http://www.ft.com/cms/s/0/a5ded58e-bbab-11e5-b151-8e15c9a029fb.html#axzz3zUAMUtvM
[18] http://www.telegraph.co.uk/finance/newsbysector/mediatechnologyandtelecoms/media/12107727/Johnston-Press-seeks-to-offload-struggling-local-newspapers.html
[19] http://www.ft.com/cms/s/0/ff5679dc-f0f8-11e5-9f20-c3a047354386.html#axzz46CK3VGEZ
[20] http://www.theguardian.com/media/2016/feb/29/bbc-news-cuts-news-channel

TOP BRANDS

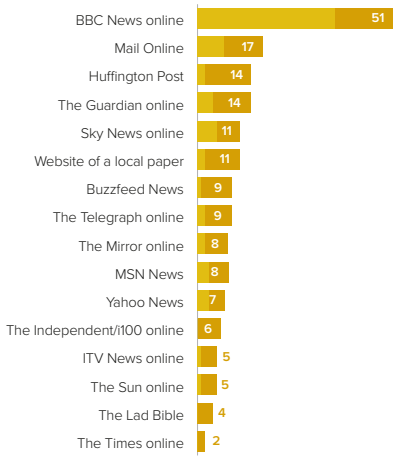
% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

TV, RADIO AND PRINT



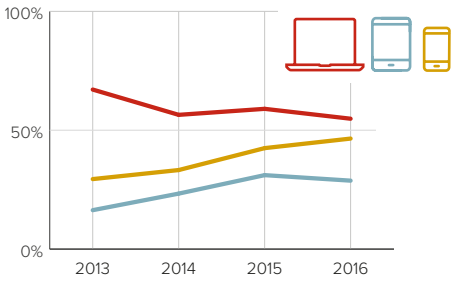
ONLINE



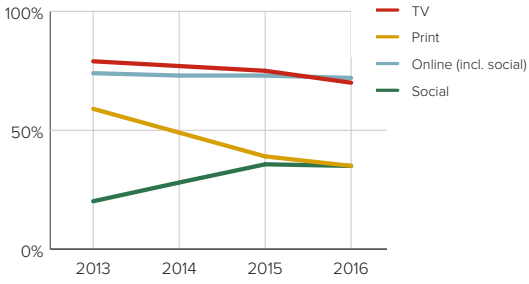
CHANGES IN MEDIA USAGE 2013–2016

Smartphone news use has risen to a record 46% with many publishers reporting the majority of traffic from mobile devices. By contrast tablet news usage is moving in the other direction.

WEEKLY REACH PER DEVICE



SOURCE OF NEWS 2013–16



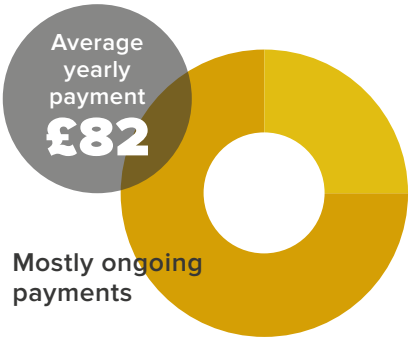
PAYING FOR NEWS

The UK has one of the lowest headline payment rates of all our countries but most of these represent high value ongoing subscriptions. More publishers are investigating paid content or membership models.

PAY

7% pay for online news

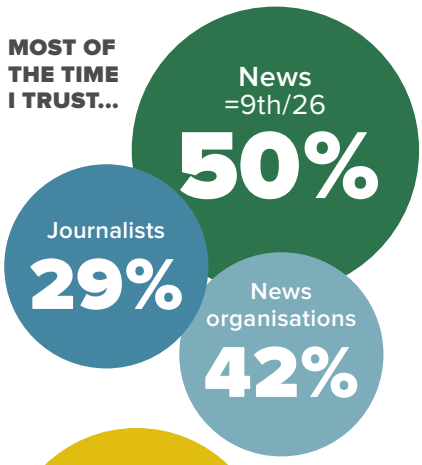
(=22nd/26 countries)



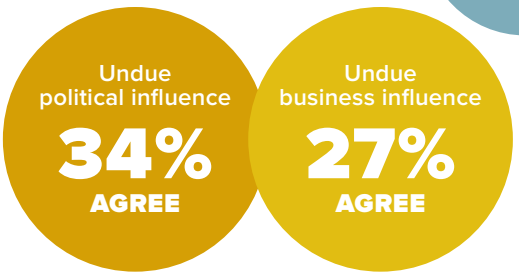
TRUST

News brands have a strong heritage and reasonable levels of trust, but the reputation of journalists has been affected by recent scandals involving phone hacking and other invasions of privacy by parts of the tabloid press. In polls television journalists (who are required by UK regulator Ofcom to present unbiased news) are considered more trustworthy than print journalists.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



AD BLOCKERS



21%

use ad blockers.

(=19th/26 countries)

32% under 35.

TOP SOCIAL NETWORKS*

RANK		NETWORK	ALL	U35s
1		Facebook	28%	41%
2		Twitter	12%	20%
3		YouTube	7%	11%
4		WhatsApp	3%	5%
5		Linkedin	2%	3%

*used weekly for news

GERMANY

German media use remains amongst the most traditional in Europe with television still preferred – but there has been a significant increase in social media and access via mobile devices.

STATISTICS

Pop	**81m**
Internet penetration	**88%**



The last year has seen a robust public debate in Germany over issues of journalistic trust. Criticism relates to coverage of the sexual assaults during New Year's Eve in Cologne and the conflict in Ukraine where journalists were accused of making errors, concealing facts, and biased reporting that supported the government line. Critics argue that Germany's media are controlled by a politically correct elite, with some right-wing groups using the slogan *Lügenpresse* (lying press), a slur popular during the Nazi era. A majority of Germans still trust the media, but in a recent poll more than 40% described reporting on refugees as one-sided.[21]

Television, particularly the widely watched evening bulletins from PSBs ARD and ZDF, remains the most important news source in Germany, although the internet is the main source for under-35s. Traditional brands dominate usage both offline and online and there has been little disruption from digital-born websites – although both BuzzFeed (2%) and the Huffington Post (8%) have German editions. Social media are less popular than in many other countries.

Having said that, German publishers have been creating and distributing more news in social networks over the last year – as well as more news designed for sharing. A number of new youth-orientated sites launched in 2015 include Bento, Ze.tt, and BYou; all spin-offs from the traditional news brands *Spiegel*, *Zeit*, and *Bild* respectively. These sites focus on soft news with a lighter tone, while using attention-grabbing and emotional headlines.

German PSBs have also been stepping up digital developments. At the start of 2015, ZDF launched a new cross-media news format heute+, which presents current topics in a more conversational and reflective way incorporating social channels.

The number of people who pay for online news remains low in Germany at just 8% in our survey, though publishers are increasingly focusing on charging online. In the last year *Süddeutsche Zeitung* has restricted users to ten free articles, with a paywall once this limit is reached and according to the Federation of German Newspaper Publishers (BDZV)[22] this metered model is now used by about one-third of daily newspapers online. A bigger proportion (60%) use a freemium model where selected content is subject to charges. Just 5% rely on a hard paywall that restricts all content to paying users.

Meanwhile Germany's best-known publisher, Axel Springer, announced increased digital revenues amounting to 70% of the group's total.[23] Much of this has resulted from a deliberate strategy of diversification and investment in digital businesses across Europe and the United States. Springer took a 97% stake in Business Insider during 2015 and has shares in native video site NowThis, millennial publisher Mic as well as Politico Europe.

German publishers have also been leading the charge against ad-blockers. Axel Springer was amongst the first to restrict *all* access to bild.de unless the user turns off their ad-blocker or signs up for a monthly subscription. Other publishers have been informing readers that online advertising helps support quality journalism to try to convince them to switch off the software. They have also been investing in sponsored and branded content (so-called native advertising).

Blendle, which launched in Germany at the end of 2015, charges a small fee (micropayment) for each article sold and contains content from many of Germany's leading publishers. Its most-read lists contain mainly serious news articles and fewer of the soft news articles and sensational headlines that are often found elsewhere. However, just 1% of our survey respondents said they had used Blendle in the last week.

Uwe Hasebrink and Sascha Hölig
Hans Bredow Institute for Media Research, Hamburg

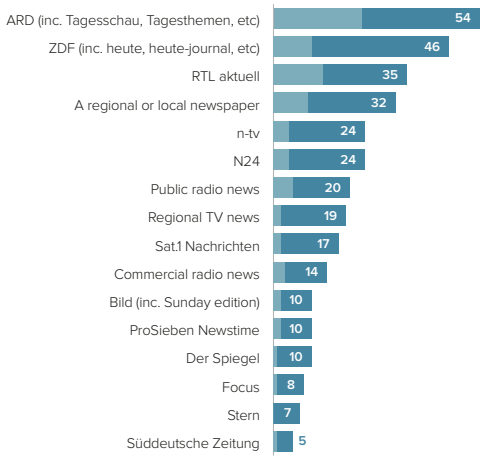
[21] http://www.politico.eu/article/cologne-puts-germany-lying-media-press-on-defensive-migration-refugees-attacks-sex-assault-nye
[22] http://www.bdzv.de/nachrichten-und-service/branchennachrichten/artikel/detail/paid_content_trend_ist_ungebrochen
[23] http://www.axelspringer.de/en/presse/Axel-Springer-strengthens-position-as-leading-digital-publisher-in-the-2015-financial-year_26333671.html

TOP BRANDS

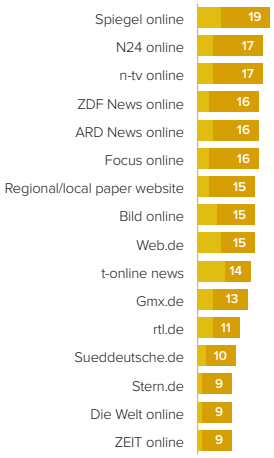
% Weekly usage

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- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

TV, RADIO AND PRINT



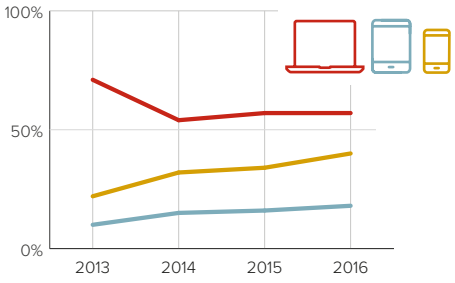
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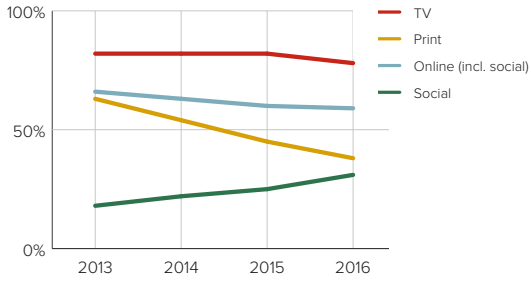
CHANGES IN MEDIA USAGE 2013–2016

Germany has a much higher usage of TV news than most other countries and has adopted more slowly to new online behaviours. Smartphone and social media use for news is also growing at a slower rate.

WEEKLY REACH PER DEVICE



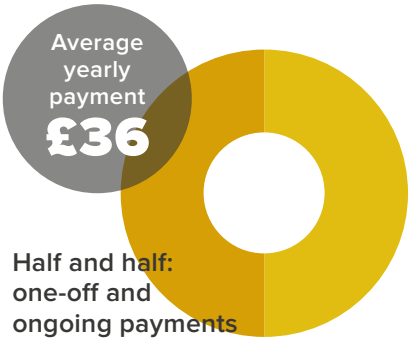
SOURCE OF NEWS 2013–16



PAYING FOR NEWS

The relatively healthy position of German newspapers and magazines meant they were late to charge users for online news. This is changing with a mix of models including paywalls and micropayment.

PAY **8%** pay for online news (=20th/26 countries)



Half and half: one-off and ongoing payments

AD BLOCKERS



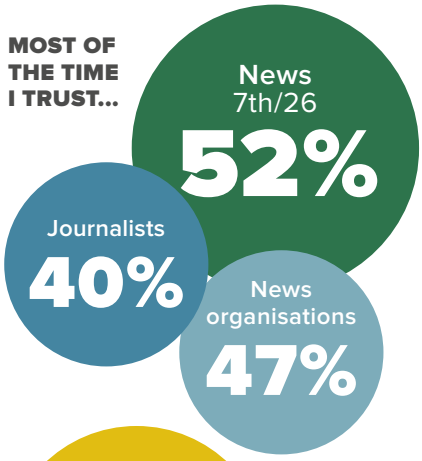
25% use ad blockers. (=10th/26 countries)

39% under 35.

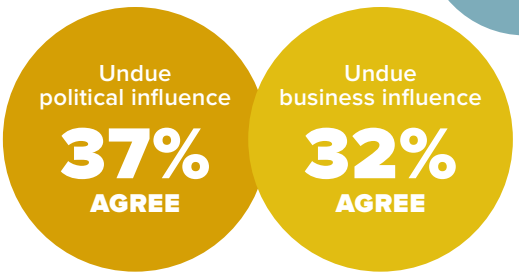
TRUST

Despite the recent debates about biased reporting, most Germans still broadly trust the news. This is due to a strong track record of reliable reporting from both public service and commercial news brands. Our focus groups show that Germans are aware that truth is a complex issue but they also expect transparency and diverse views in news coverage.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



TOP SOCIAL NETWORKS*

RANK		NETWORK	ALL	U35s
1	f	Facebook	27%	37%
2	YouTube	YouTube	12%	15%
3		WhatsApp	10%	13%
4		Twitter	4%	5%
5		XING	3%	2%

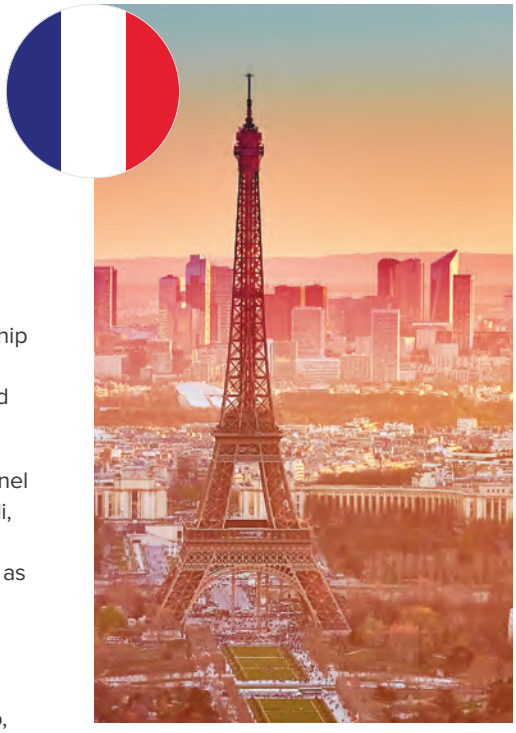
*used weekly for news

FRANCE

The media in France is characterised by a strong and vibrant broadcasting sector and a weak press that has struggled to manage the transition to digital. There is a growing concentration of media ownership amongst a few powerful tycoons.

STATISTICS

Pop	**66m**
Internet penetration	**84%**



The Paris attacks in November 2015 and the earlier Charlie Hebdo killings in January, along with two elections, have heightened interest in news over the past year. The 24-hour news channel BFM TV reached 4m viewers on 9 January and 2.5m on the night of 13 November and further cemented its reputation as a core destination for live news. However, it faces new competition from the LCI news channel (part of the TF1 group), which went free to air in April 2016 having previously only attracted small audiences through pay TV.

By contrast, the newspaper sector has been unable to capitalise on the strong interest in the news, despite playing a key role online; a video of the drama outside the Bataclan concert hall taken by a *Le Monde* journalist on his iPhone was widely shared on social media and the website remains a key online destination. Despite strong online performances by newspaper groups, print circulation keeps falling (-3.83%) and advertising revenues are significantly down (-0.6% in general and -7.9% for newspapers).

Media concentration has been the big story of the last year within the news industry. Patrick Drahi, owner of the telecom provider SFR-Numericable, acquired L'Express-Roularta, and created a new group called Altice Media which includes existing media properties such as left-wing newspaper *Libération*. Drahi has also taken a significant stake in NextRadioTV, owners of BFM TV and RMC. Meanwhile Bernard Arnault, owner of luxury company LVMH and financial newspaper *Les Echos*, has bought *Le Parisien-Aujourd'hui en France*, a daily newspaper for Paris and the surrounding regions, with a sister-version for the rest of France. More than a hundred people left L'Express-Roularta after the ownership change. At Lagardère, owner of magazines and TV channels, around 200 are expected to leave.

Canal+, proprietor of the news channel i-Télé, also has a new owner, Vivendi, whose CEO Vincent Bolloré made significant changes to management as the channel is losing subscribers.

PSB is split between three entities, one for radio, one for TV, and one for international broadcasting. Radio, especially morning news programmes, remains strong. Public service performs well via radio but faces competition from TF1 and other TV news channels. In response, the new leadership at France Télévisions and Radio France are building a joint PSB 24-hour news channel on TV and online. It is due to launch in autumn 2016 and means France will have one of the highest number of free-to-air news channels in the Western world.

In terms of online news, readership of the main websites keeps growing, especially on mobile, but revenue remains a problem. Many publishers operate a metered paywall or use a freemium model – like *Le Monde* and *Le Figaro* – restricting some articles to subscribers.

Digital advertising revenues are not rising as fast as expected and have been hit by the growth in ad-blocking, which at 30% is well above the European average. In March 2016, the main publishers launched a coordinated public campaign to increase awareness about the issue and in some cases have restricted access for those using ad-blockers.[24]

One exception to the downward industry trends is Mediapart, a profitable news website known for its investigative journalism and strong opinion pieces. Mediapart relies solely on subscription income and the website has no advertising. Les Jours, a start-up founded by former journalists of *Libération*, launched in March 2016, also with a subscription model. In print, *Society*, a biweekly magazine, was launched by So Press to critical acclaim. French editions of Huffington Post (13%) and BuzzFeed (4%) are also making an impact – especially with the young.

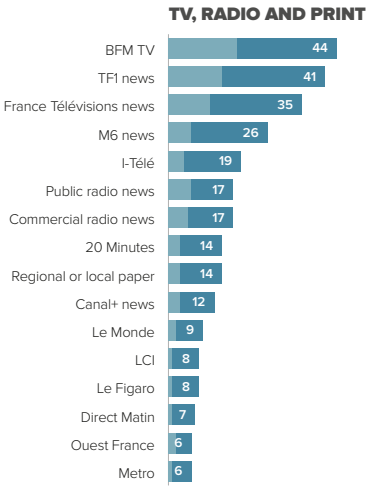
Alexandre Lechenet
Writer and data-journalist at Libération and former Reuters Institute Journalist Fellow

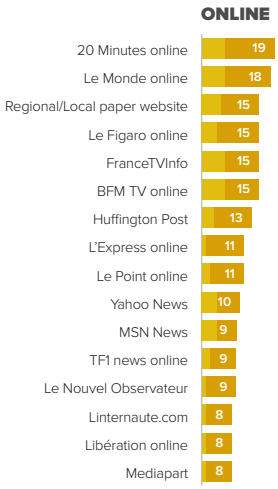
[24] http://digiday.com/publishers/mais-non-french-publishers-find-tougher-tactics-actually-work-ad-block-users

TOP BRANDS

% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

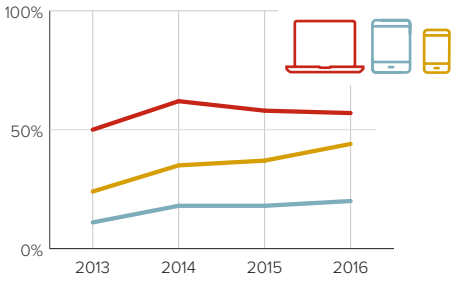




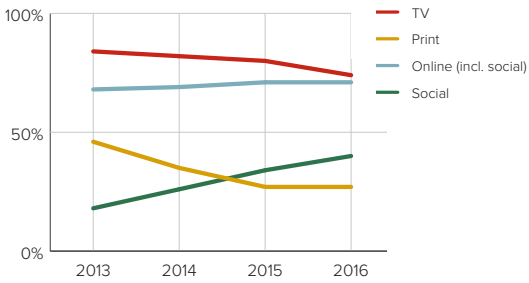
CHANGES IN MEDIA USAGE 2013–2016

Television news remains the most important source of news in France, although audiences are now dipping, especially with the young. Print newspapers have lower reach than elsewhere in Europe.

WEEKLY REACH PER DEVICE



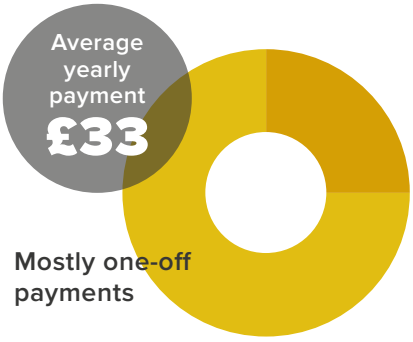
SOURCE OF NEWS 2013–16



PAYING FOR NEWS

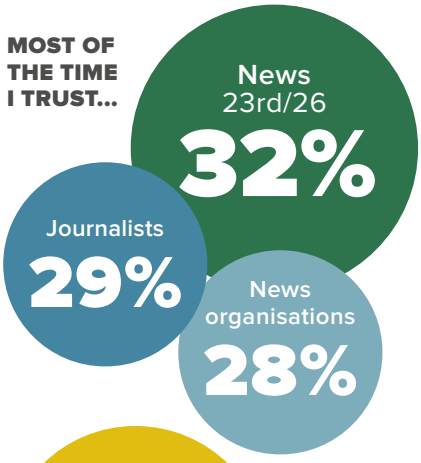
Most newspaper groups are stepping up efforts to drive digital or bundled subscriptions, but progress is slow.

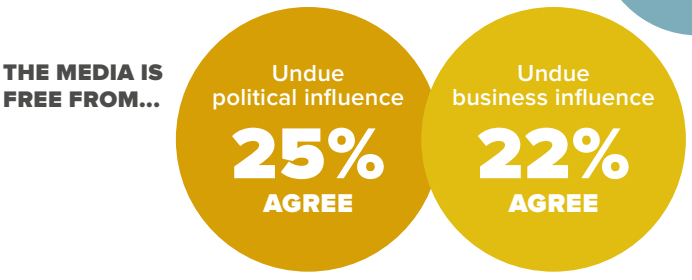
PAY **11%** pay for online news
(12th/26 countries)



TRUST

Overall trust is amongst the lowest in Europe with only around a quarter agreeing that the news is free from political (25%) or commercial (22%) influence. Trust has been affected by a perception that media tycoons known for their links with high profile politicians have interfered directly with editorial matters.





AD BLOCKERS



30%
use ad blockers.
(=4th/26 countries)
45% under 35.

TOP SOCIAL NETWORKS*

RANK		NETWORK	ALL	U35s
1		Facebook	42%	51%
2		YouTube	21%	21%
3		Twitter	8%	12%
4		Google+	6%	3%
5		WhatsApp	3%	4%

*used weekly for news

ITALY

The media environment is characterised by a strong television sector, a weak and declining print sector, and growing use of the internet and smartphones for news.

STATISTICS

Pop	**61m**
Internet penetration	**62%**



Television viewing in Italy ranks among the highest in Europe and TV news bulletins remain the main source of information, not least because overall internet penetration is much lower than other developed countries.[25]

Although new channels have been created in recent years, the Italian television sector remains highly concentrated. Almost 90% of the overall revenues are generated by just three companies: the pay-TV Sky Italia, the private group Mediaset, and the public broadcaster RAI. A fourth operator, La7, has invested strongly in its news output, but remains marginal in terms of both revenue and audience share.[26]

The RAI-Mediaset duopoly, which is slowly weakening, has always raised concerns about pluralism of information in a country marked by strong TV viewership. In addition, the two main operators are heavily shaped by politics. The owner of Mediaset, Silvio Berlusconi, is still leader of one of the main Italian political parties, while RAI programming has long been subject to political influence. It is too early to assess whether a reform of RAI's governance, approved in December 2015, will strengthen its independence.

Newspaper readership has always been low in Italy and the newspaper landscape consists of commercially weak dailies addressing an elite and politically defined audience. Consequently the agenda of the press is often influenced by business and political interests – with many Italian papers providing a partisan view on political, economic, and social developments.

The press sector is less concentrated than TV. Two main publishers, RCS (that publishes *Il Corriere della Sera*) and Gruppo Espresso (that publishes centre-left *La Repubblica*) together account for 40% of the sector revenues.[27] In March 2016, *La Repubblica* and *La Stampa*, the latter owned by car-maker Fiat Chrysler, announced plans for a merger that will lead to the creation of Italy's biggest publishing group.

The income of Italian traditional media (newspapers, TV, and radio) is declining significantly (-12% between 2010 and 2014), with print more dramatically affected (-30%).[28] Revenues within the online sector are growing, but they still represent a minor share of overall media company revenues.

In terms of online news, most business models are based on advertising although there have been some experiments with paid content. In January 2016, leading Italian newspaper *Il Corriere della Sera* adopted a metered paywall for its online news. Other newspapers, such as *La Stampa* and the business news outlet *Il Sole 24 Ore*, have also introduced forms of premium content for specialised news and databases.

According to the 2015 AGCOM report, the contribution of the newspapers' digital activities to their overall revenue is up from 5% in 2010 to 10% in 2014, but this growth far from offsets losses from traditional print operations.

Legacy news organisations still dominate usage online. Indeed, the websites with the widest reach are those of the main Italian newspapers (La Repubblica.it, Il Corriere.it, Il Fatto Quotidiano.it, La Stampa.it and Il Sole 24 Ore.it), the main private TV operators (the Mediaset's TgCom24.it and SkyTg24), and the main news agency (ANSA). The public broadcaster RAI has not yet completed the transition from a broadcasting to a multichannel media company: while its TV newscasts (Tg1, Tg2, and Tg3) have the widest offline reach, its online platforms (Rainews.it and RAI.it) are marked by below par performances.

Digital-born players, such as Huffington Post Italia (12%), Fanpage (9%), and Il Post (5%), have increased their reach, but audiences are not comparable to the legacy players. Our data show that many Italians also like to use news aggregators, such as Google News (19%) and Giornali (17%) (a news app for Android devices).

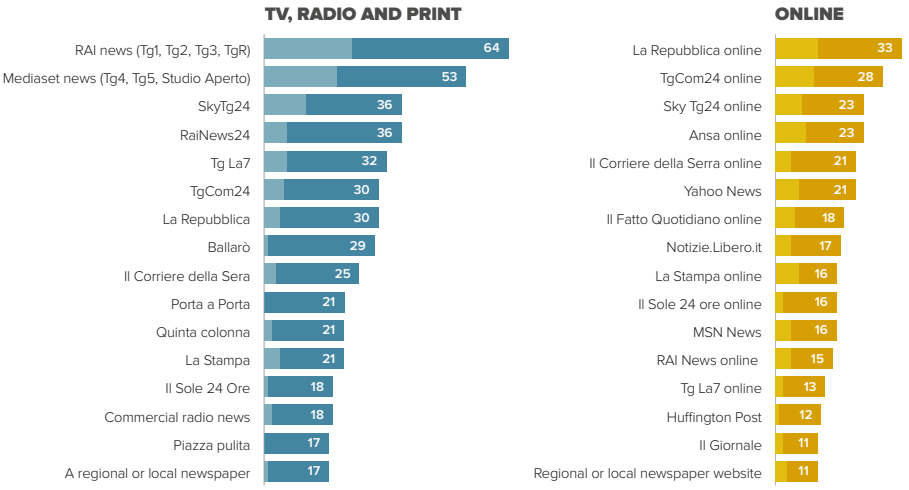
Alessio Cornia
Research Fellow, Reuters Institute

[25] EAO 2015; http://www.demos.it/a01201.php.
[26] AGCOM 2015 http://www.agcom.it/annual-report
[27] AGCOM 2015.
[28] AGCOM 2015.

TOP BRANDS

% Weekly usage

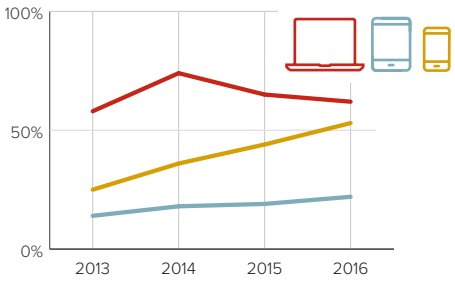
- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*



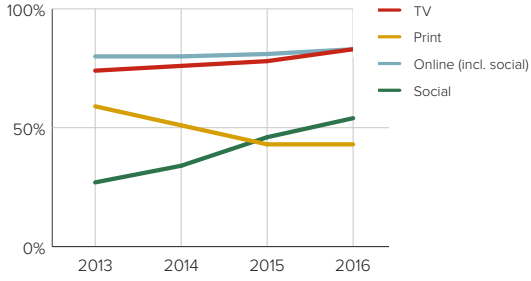
CHANGES IN MEDIA USAGE 2013–2016

Television news remains the most important source of news in Italy, particularly as Italy has one of the lowest internet penetration rates in Europe. Amongst online users, social media has grown rapidly as a source of news.

WEEKLY REACH PER DEVICE



SOURCE OF NEWS 2013–16

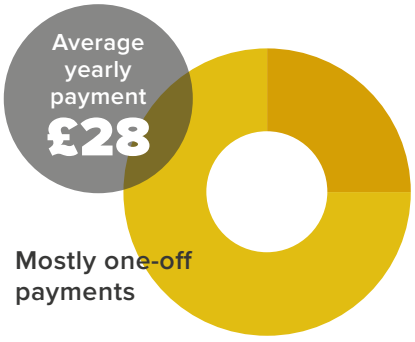


PAYING FOR NEWS

The relatively high headline rate (16%) masks the fact that just 4% have ongoing digital news subscriptions, with most of those that pay doing so through one-off purchases of single editions.

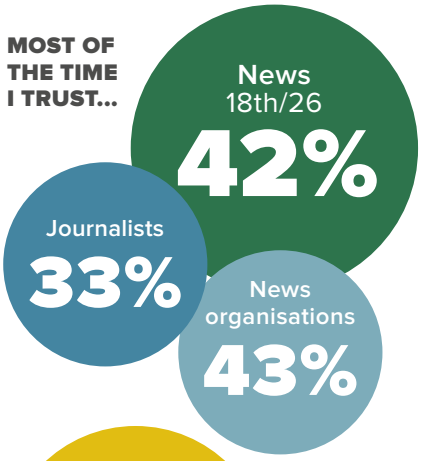


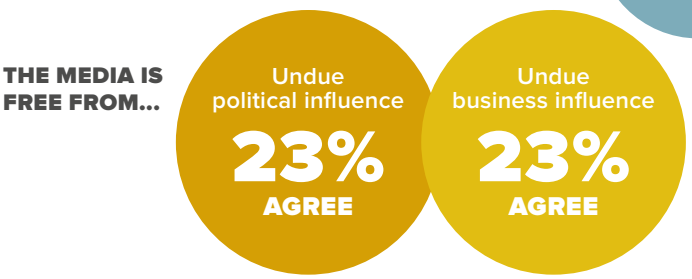
16% pay for online news
(6th/26 countries)



TRUST

The partisanship of Italian journalism combined with political and business influence on media organisations has led to relatively low levels of trust in the news. Trust in journalists is particularly low perhaps because the most-popular Italian journalists tend to clearly express their political positions within their analysis or during their participation, as guests, in talk shows.





AD BLOCKERS



20%
use ad blockers.
(=22nd/26 countries)
35% under 35.

TOP SOCIAL NETWORKS*

RANK		NETWORK	ALL	U35s
1		Facebook	54%	62%
2		YouTube	23%	23%
3		WhatsApp	20%	22%
4		Twitter	10%	12%
5		Instagram	5%	9%

*used weekly for news

SPAIN

Two private operators dominate broadcasting, while newspapers increasingly find audiences online, where they face strong competition from a mix of new and long-running digital natives.

STATISTICS

Pop	**46m**
Internet penetration	**77%**



The decline of paid print newspapers accelerated in 2015 as their circulation decreased by 9% – just half of the sales level in 2004 – according to Spanish audit bureau OJD. This affected newsstand sales (-10%) more than subscriptions (-4%). There was a small decrease in broadcast listenership and viewership, while the internet gained almost 2.5 million daily users, up to 26.5 million, according to the EGM study by AIMC.[29] Newspaper sites were the most visited.

El País is Spain's number one print and online brand. Editor-in-chief Antonio Caño recently said that it will become 'an essentially digital newspaper', with more video and more coverage from the Americas, but that they will 'continue publishing a print edition that is of the highest quality for as long as is possible'.[30] David Jiménez took over as editor-in-chief of second-place *El Mundo* – which launched the Sunday supplement *Papel* – and Juan Ignacio Gallardo was given the same role at leading sports paper *Marca*. The print business still provided 80% of newspaper revenues in 2015.

Heraldo de Aragón bought 20 minutos from Schibsted, thus acquiring the third most-read newspaper website, and the only remaining major freesheet, with half of its print distribution concentrated in Madrid and the rest in six other cities. Two women were appointed editors-in-chief of the two most-read Catalan-language news sites: Karma Peiró at NacióDigital and Esther Vera at Ara.

The digital native sector saw ElEspañol.com raise €3.6 million from over 5,000 investors, in the most successful journalism crowdfunding campaign ever. The site launched in October 2015. Former *La Vanguardia* editor-in-chief José Antich founded the bilingual site ElNacional.cat. Other newcomers include okdiario.com, ctxt.es, bez.es, sabemosdigital.com, and revista5w.com. This part of the market is still clearly led by ElConfidencial.com, with Eldiario.es, Público.es, and El Huffington Post also doing well in terms of reach. Vozpópuli, founded in 2011, made a profit (€152,551) for the first time in 2015, joining other digital natives already in the black such as El Confidencial and eldiario.es. These digital native successes may be driven by the ongoing loss of human capital at all levels of many traditional newsrooms and the users' desire for a broader spectrum of views and news.

Private groups Mediaset and Atresmedia dominate the television sector. Between them they reach 60% of the audience, 86% of advertising revenues, with net profits of €162m and €99m in 2015. The president of market regulator CNMC called this a 'disturbing duopoly'.[31] Atresmedia owns the two most popular broadcast news brands: Antena 3 and La Sexta. Most PSBs, in particular state-owned TVE and its news operation, increasingly struggled to reach some sectors of the audience, especially younger groups.

Advertising revenues grew by 8% in 2015, according to Infoadex. The increase was driven by television (+7%), the internet (+12%) and radio (+8%), whereas print managed to remain flat after several years of falling revenue. Our survey shows that 28% of users, including 44% of adults under 35, use ad-blockers. Some sites, including El Confidencial, already ask for them to be switched off before their content can be accessed.

Google Search continues to be a gateway for news even though the News service is not available in Spain, following a 2014 law that forces publishers to charge aggregators for displaying snippets of stories. Major sites are publishing via Facebook Instant Articles and have gone on experimenting with WhatsApp, Telegram, Instagram, Periscope, and Snapchat for coverage, interaction, and distribution, as well as producing highlights graphics and short videos specifically for social media. Digital publishers have adapted to mobile and social consumption with responsive design websites and the launch of viral-friendly sections that play with the curiosity gap.

Samuel Negredo, Alfonso Vara and Avelino Amoedo
Center for Internet Studies and Digital Life, University of Navarra

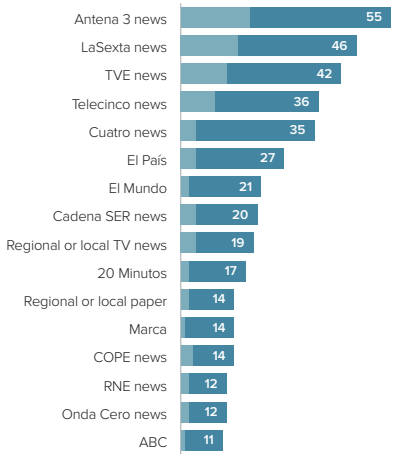
[29] http://www.aimc.es/-Datos-EGM-Resumen-General-.html
[30] http://elpais.com/elpais/2016/03/04/inenglish/1457078700_070078.html
[31] http://www.infolibre.es/noticias/medios/2016/02/25/mediaset_atresmedia_logran_multiplicar_sus_beneficios_este_ano_con_respecto_los_2014_45500_1027.html

TOP BRANDS

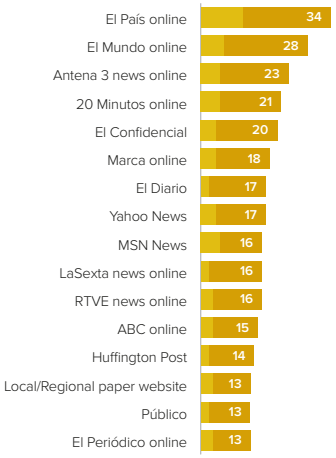
% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

TV, RADIO AND PRINT



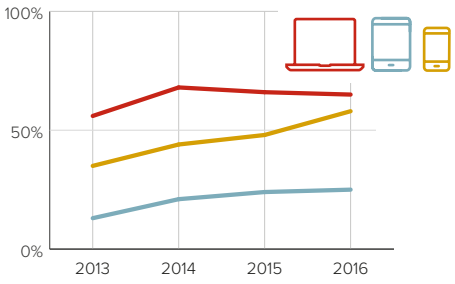
ONLINE



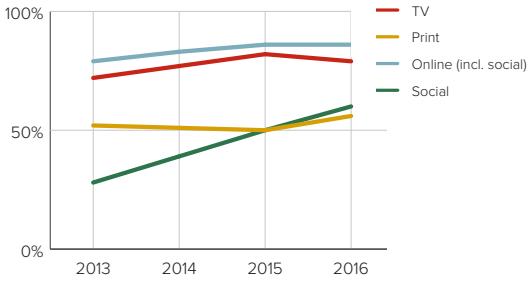
CHANGES IN MEDIA USAGE 2013–2016

Smartphones have been enthusiastically embraced in Spain with further significant growth over the last year. Majority use is for cheaper Android devices rather than Apple iPhones.

WEEKLY REACH PER DEVICE



SOURCE OF NEWS 2013–16

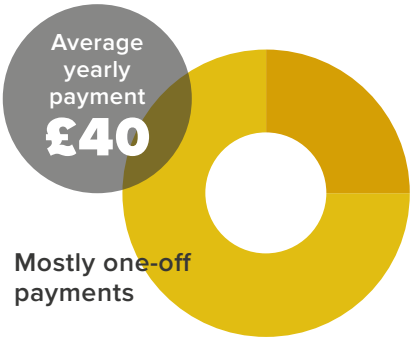


PAYING FOR NEWS

Digital newsstands sell electronic versions of newspapers but otherwise most online news is supported by advertising with few publishers operating paywalls.



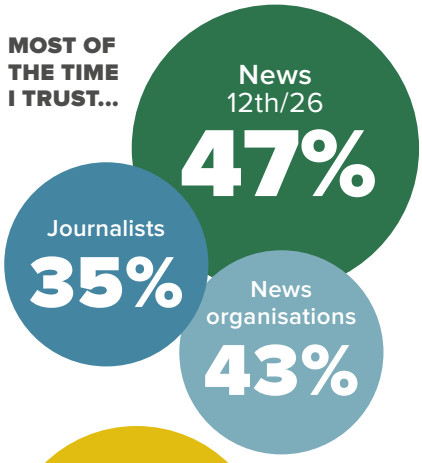
10% pay for online news
(=13th/26 countries)



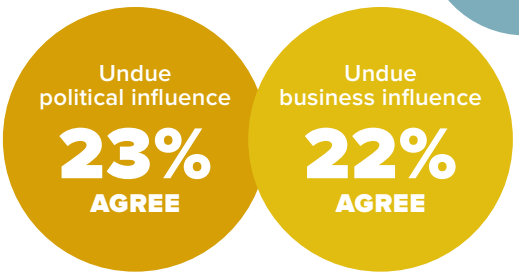
TRUST

Over half (53%) of users in Spain don't think that the media are independent from undue political influence, with government control of PSBs an ongoing issue. Over half (51%) are also concerned about financial dependence on big advertisers, owners, and creditors. Ideological bias, partiality, and loaded language are key drivers of mistrust according to our focus group participants.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



AD BLOCKERS



28%
use ad blockers.
(6th/26 countries)
44% under 35.

TOP SOCIAL NETWORKS*

RANK		NETWORK	ALL	U35s
1		Facebook	49%	59%
2		YouTube	19%	27%
3		WhatsApp	26%	28%
4		Twitter	19%	19%
5		Google+	6%	3%

*used weekly for news

PORTUGAL

The news media environment in Portugal is characterised by a high reliance on television news sources, a weakening print media sector and a radio sector that struggles to remain relevant. We also see a focus on television-centred business strategies and a decreasing number of journalists in newsrooms.

STATISTICS

Pop	**10m**
Internet penetration	**68%**



In television, private broadcasters SIC and TVI are the dominant brands, either through their TV channels or news channels ('SIC Notícias', the first 24/7 news channel launched in Portugal, and 'TVI 24'). The Portuguese public broadcaster, RTP, is also an important player offering two channels and a dedicated news one ('RTP 3', former 'RTP Informação') – following a successful rebranding with improved audience figures.

In terms of print news, *Jornal de Notícias* and *Correio da Manhã* confirm their status as key reference brands. The latter, a popular tabloid paper, has entered the television business with a successful new cable TV news offer Correio da Manhã TV. Other traditional print media outlets such as *Económico,* that abandoned its print edition in early 2016, and *A Bola* (a sports newspaper) have also invested in TV channels, which are seen as a more lucrative investment than either print or online.

The news market in Portugal has been unable – despite a recovery in advertising revenues – to counter the decrease in other revenues obtained through premium telephone numbers in television contests, loss of paid subscriptions, and falling revenues in renewal of cable TV distribution licences. Also of importance for the financial health of the Portuguese media sector is its exposure to debt and low stock market values.

As for radio broadcasters, TSF, Rádio Renascença (private) and Antena 1 (public broadcaster) play a significant role in the news landscape. While other radio stations in Portugal also provide news, these three brands combine music and news – an approach that seems to work well in the Portuguese market both in terms of advertising revenues and audiences.

Five media groups dominate the news in Portugal. Besides the public TV and radio broadcaster RTP, groups such as COFINA (*Correio da Manhã* – TV and newspaper, *Negócios* – newspaper), Global Media (*Jornal de Notícias*, *DN* – newspapers and TSF – radio), IMPRESA (*Expresso* – newspaper and SIC – TV channels), and PRISA (TVI – several TV channels) provide the majority of news production in Portugal, both offline and online.

Portugal has seen a reduction in numbers of 1,218 journalists between 2007 and early 2015. The media industry now employs just 5,621 journalists – an all time low. Unemployment and the widespread use of trainees in newsrooms are two emerging trends for 2016.

The past year has seen a significant rise in smartphone use for news (+15), as well as a strong increase in social media for news.

This year's data show a media environment characterised by the offline dominance of private television channels (SIC and TVI) and online by television brands (SIC), telecom brands (SAPO), an internet-only brand (Noticias ao minuto) and in the next three places newspapers (*Jornal de Notícias*, *Público*, and *Correio da Manhã*).

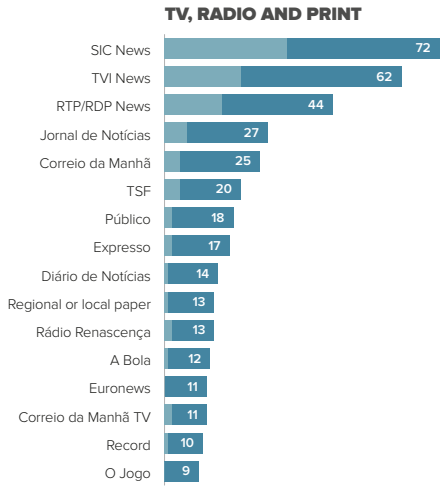
The online media brands show the distinctive nature of the Portuguese market. Two of the top five spots go to SAPO, owned by major Portuguese telecom carrier (PT). SAPO hosts some media outlets such as online SIC Notícias (the cable news TV channel) and the online versions of several newspapers and magazines, and it also publishes original content of its own through the Sapo.pt portal. In fourth place we find another news aggregator, 'noticiasaominuto.com' that offers edited contents from other news outlets.

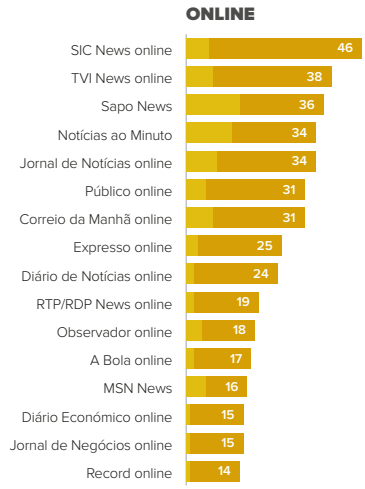
Gustavo Cardoso and Ana Pinto Martinho
ISCTE, University Institute of Lisbon

TOP BRANDS

% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

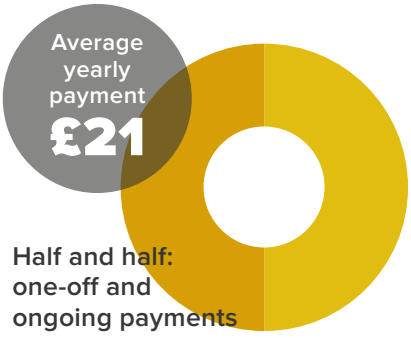




PAYING FOR NEWS

Payment for online news in Portugal remains low (9%), with slow growth in digital and bundled subscriptions.

PAY **9%**
pay for online news
(=16th/26 countries)

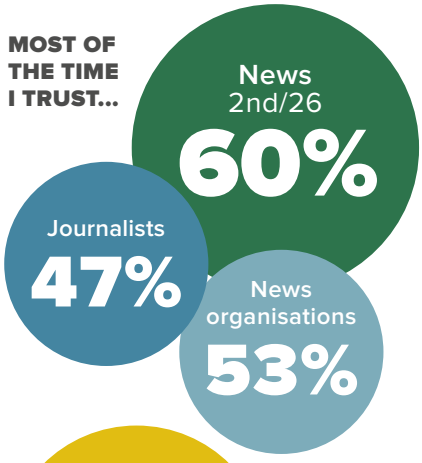


Half and half: one-off and ongoing payments

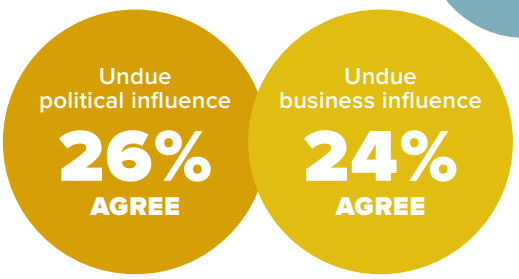
TRUST

These data confirm other studies showing high levels of trust in the news and journalists in Portugal.[32] This may relate to a strong tradition of press freedom, which is guaranteed under the constitution following the 1974 revolution. This round of data is particularly relevant as 2015 was marked by several important political changes in the Portuguese Parliament and Republic Presidency.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **72%** (-6)

Tablet **23%** (+2)

Smartphone **49%** (+15)

AD BLOCKER

26%
use ad blockers.
(=8th/26 countries)
42% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **82%** (-3)

Radio **37%** (-5)

Print **47%** (–)

Social media **66%** (+5)

Online (incl. social media) **88%** (+2)

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	63%	65%
2	YouTube	17%	16%
3	Google+	7%	3%
4	LinkedIn	6%	5%
5	Twitter	5%	5%

*used weekly for news

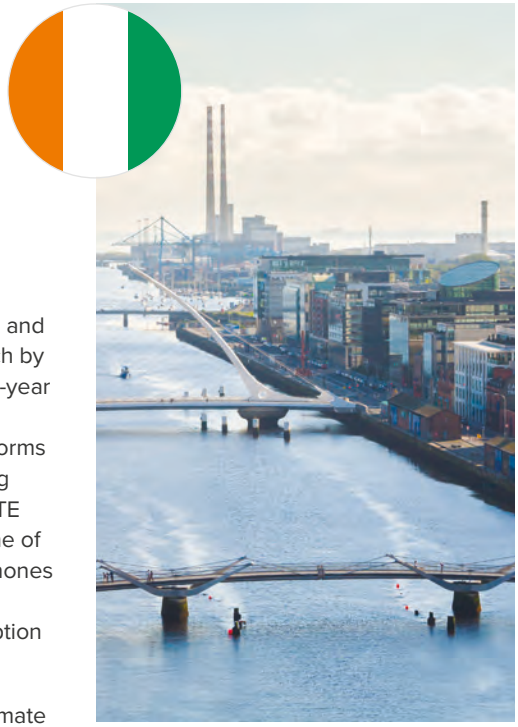
[32] 'A Sociedade em Rede em Portugal', CIES-IUL/Fundação Calouste Gulbenkian.

IRELAND

Irish titles have increased their reach with revenue streams stabilising, while digital news is on the rise with increasing numbers consuming on their mobile phones.

STATISTICS

Pop	**4.5m**
Internet penetration	**83%**



There have been a number of changes in the corporate structure of leading Irish news organisations over the last year. Independent News & Media (INM) sold its interests in Australia, clearing debts and increasing reserves. It also bought four magazines in Northern Ireland while announcing the closure of its Belfast printing press in June 2016 due to the continued decline in print sales as well as the end of the contract. INM titles such as the *Irish Independent*, the *Herald*, the *Sunday World*, *Sunday Life*, and the *Belfast Telegraph* all utilised the press.

UTV Ireland, along with UTV NI, was acquired by the UK's largest commercial network, ITV, for €135m in February 2016, along with other entities such as radio station talkSPORT, digital operations Tibus (digital infrastructure), and Simply Zesty (digital marketing).

More telecoms operators moved into broadcast: Virgin Media's parent group Liberty Mobile acquired TV3 in a €87m deal which also saw UPC rebrand to Virgin Media Ireland. Eir (formerly Eircom) bought Irish satellite channel Setanta Sports.

There was also expansion by Irish companies into the UK. Communicorp invested in the British market with acquisitions of eight radio stations from the Global Radio Group. Irish digital-born publishers Maximum Media, which operate entertainment sites joe.ie and her.ie, expanded into the UK with offices in Manchester and London.

The reach of most legacy brands fell in their traditional operations, however UTV Ireland bucked the negative trend with a 2% increase. While the reach of public service broadcaster RTE fell (-7) in TV news and (-3) in radio, it increased digital reach by (+11). RTE is three years into the five-year strategy and has continued to push developments across multiple platforms and devices, with its app accounting for about 40% of its digital traffic (RTE Annual Report 2014). Ireland has one of the highest penetrations of smartphones in the world, the highest in Europe (Statcounter) fuelled in part by adoption by younger demographics.

Free news continues to create a climate averse to digital subscriptions. The top three online news brands are the public service broadcaster, RTE, digital-born thejournal.ie, and the independent online which all offer news that is free to consumers. Despite this, some publishers have been experimenting with paid content. The *Irish Times* metered paywall has been in operation for just over one year and still reported an increase in overall traffic (Joint National Readership Survey, JNRS). The *Irish Sun*, which is behind a full paywall, also saw an increase in digital readership and Times Newspapers UK expanded its digital operations in Ireland with the *Sunday Times* adding a daily paid-for edition.

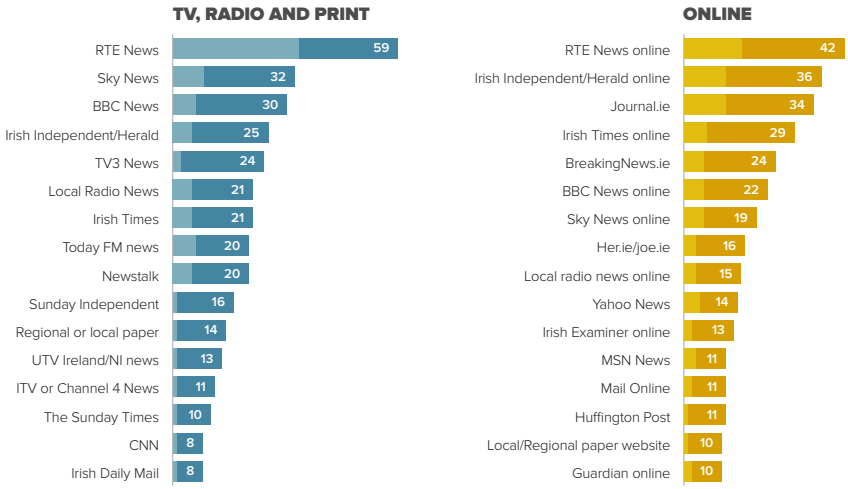
The high level of free advertiser-subsidised digital news in Ireland has had a multifaceted impact. Some 30% use ad-blockers to protect against unwanted commercial intrusions, one of the highest levels in Europe. Despite this, the level of digital advertising across the 16 NewsBrands Ireland titles (NBI, formerly National Newspapers Ireland, digital and print titles) is growing steadily. Between January and September 2015 revenue from advertising was up 3.75% on the same period last year (NBI Data Centre).

Jane Suiter and Niamh Kirk
Dublin City University.

TOP BRANDS

% Weekly usage

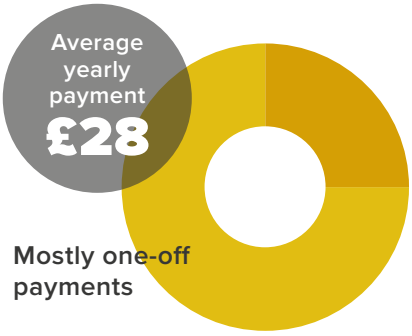
- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*



PAYING FOR NEWS

Wide availability of free news – including from UK brands – has made Irish readers reluctant to pay for online news. The introduction of some soft paywalls and premium content means the headline rate is edging higher.

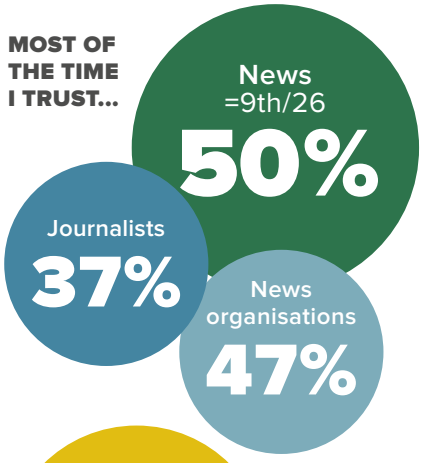
PAY **9%**
pay for online news
(=16th/26 countries)



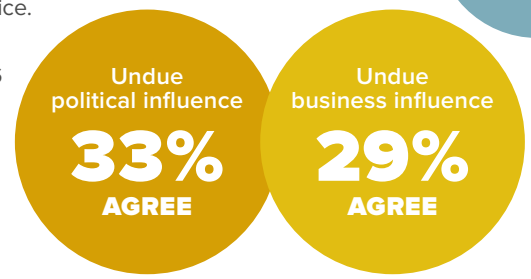
TRUST

This is an election year, with increased coverage adding to public scrutiny of the media through social media. Other issues that may have directly impacted on public trust include injunctions by media owners against the press, which failed to suppress public record documents. There were also legal disputes with the government and individual politicians, and revelations of journalists' phones and records being spied on by police.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **72%** (-2)

Tablet **23%** (+1)

Smartphone **59%** (+7)

AD BLOCKER

30%
use ad blockers.
(=4th/26 countries)
43% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **73%** (-3)

Radio **48%** (-2)

Print **47%** (-3)

Social media **52%** (+3)

Online (incl. social media) **84%** (+1)

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	45%	56%
2	YouTube	17%	17%
3	Twitter	13%	15%
4	WhatsApp	7%	12%
5	LinkedIn	4%	4%

*used weekly for news

NORWAY

The Norwegian media environment mixes strong national commercial and public service media companies with a reputation for digital innovation in content and business models.

STATISTICS

Pop	**5m**
Internet penetration	**96%**



Online and offline, the market is dominated by the tabloids *VG* and *Dagbladet*, the quality title *Aftenposten*, and two national broadcasters NRK and TV2. Regional and local papers also play a significant role in a country with large distances and strong local identity. Overall, print has been suffering with an ageing readership and falling circulation – down 8.5% in 2015, with tabloids worst affected. Print remains the main source of revenue for media companies, as online growth has stagnated.

Schibsted is the leading publisher in both Norway and neighbouring Sweden – combining multiplatform content creation with a successful classifieds business, which is now active in 21 countries. Despite increasing market dominance online, especially in mobile, powerhouse *VG* did not meet revenue targets and is cutting costs and staff, for the first time in six years. Norwegian Schibsted media earnings were down 26% in 2015.[33] More widely, Schibsted has been consolidating and reorganising its media operation with a technology, data, and audience focus, cutting ad sales staff, centralising product development and many non-content functions.

Number two tabloid *Dagbladet* has also cut staff in the past year, with an announcement in November 2015 that up to 65 further jobs would go. It axed comments below its online articles, saying that the debate had now 'moved to social media', and was the first Norwegian publisher to distribute through Facebook Instant Articles.

The issue of digital intermediaries has become a hot topic for publishers, not least because Facebook and Google together now account for around 20% of the entire ad market.[34] In February 2016, Schibsted Chairman Ole Jacob Sunde called for a new alliance between Norwegian publishers to counter this threat – including collaboration over content, distribution, and sharing of user data.[35]

Another leading publisher, Amedia, which owns 62 local and regional papers, has also suffered reduced revenue, but profits are up 20% following cuts to operating costs and the sale of some titles. In 2016 Amedia was bought by the foundation Sparebankstiftelsen, which has promised to keep the group together.

Norwegians are getting used to paying for online content with widespread bundling of digital access with existing paper subscriptions. The tabloid sector operates a freemium model with 70,000 paying customers for the premium VG+ service and 14,000 for the Dagbladet equivalent (DB+).

Many publishers are cautious about new micropayment services for fear of undermining more lucrative subscriptions, but they have moved into branded and sponsored content in 2015. This has led to concerns around the labelling of sponsored content, with VG criticised twice by the ethical board of Norwegian media.

In digital-born media, Filter Nyheter launched in 2016 with a business model based on sponsored and branded content. In addition to original investigative journalism, this popular newsletter aggregates content from other media and distributes them via Facebook Instant Articles, email, and a WordPress site. Other notable start-ups are Medier24, financed by job listings, and Vio Media, a self-styled 'Netflix for magazines'.

Meanwhile, the main public broadcaster NRK is facing political and funding pressures, similar to those in other countries. Around 300 jobs have gone over the last two years (about 9% of the total) due to reductions in licence fee income and the Norwegian Parliament is currently considering a new NRK charter. The main issues are related to modernising the TV-based financing model and addressing commercial media's concerns around NRK's strong market position (86% daily reach[36]).

FM radio will be switched off by 2017 and will be replaced by DAB+ and online distribution. This might prove challenging, especially in cars, which today account for a large share of listening. Meanwhile, it's been a year of podcasting in Norway, with many media houses experimenting with the format, both in-house and by commission.

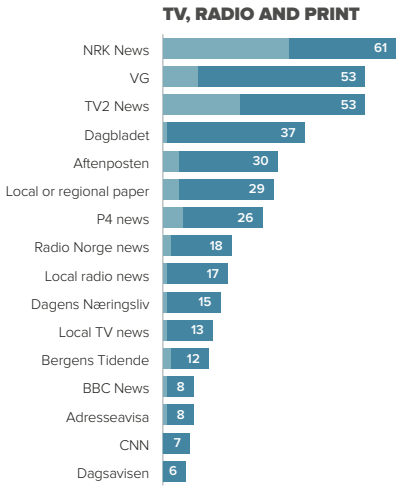
Anders Hofseth
Reuters Institute Journalist Fellow (and NRK)

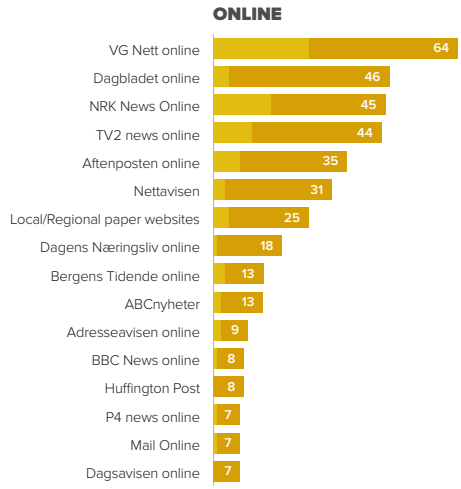
[33] http://journalisten.no/2016/02/schibsted-varsler-fortsatte-kostnadskutt
[34] http://www.aftenposten.no/kultur/Schibsted-topp-varsler-felles-kamp-mot-Facebook-og-Google-8368674.html
[35] Ibid.
[36] http://www.medienorge.uib.no/statistikk/medium/avis/368

TOP BRANDS

% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

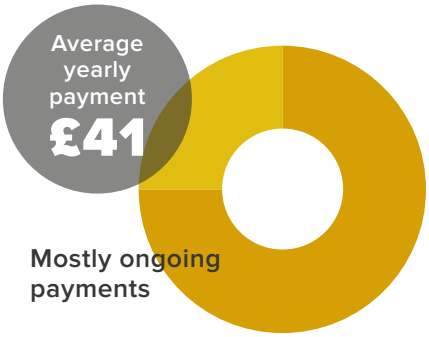




PAYING FOR NEWS

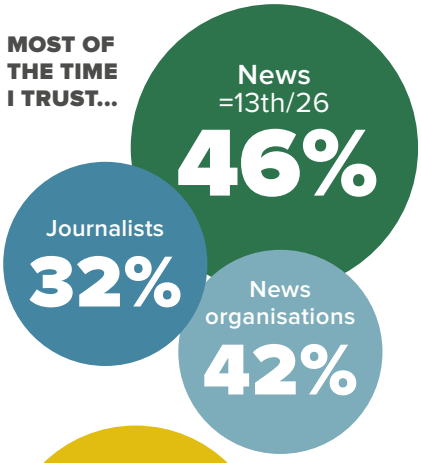
Newspaper readership and subscription has traditionally been high in Norway and this has helped with the transition to online where payment levels are the highest of all our *Digital News Report* countries.

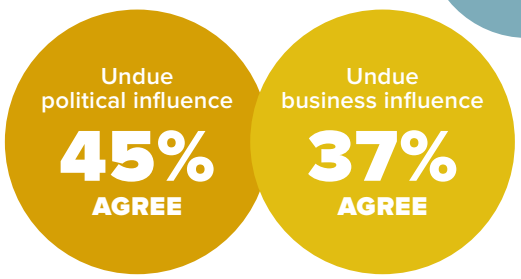
PAY **27%**
pay for online news
(=1st/26 countries)



TRUST

Norway has average levels of trust with low levels of political polarisation in the media. Trust may have been affected by several factors in 2015: the growth of sponsored content, clickbait tendencies in online media, or the scandal around a journalist systematically plagiarising content.





WEEKLY NEWS REACH PER DEVICE

Computer **66%**
Tablet **36%**
Smartphone **64%**

AD BLOCKER

23%
use ad blockers.
(=15th/26 countries)
40% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **72%**
Radio **47%**
Print **41%**

Social media **54%**
Online (incl. social media) **86%**

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	45%	50%
2	YouTube	9%	10%
3	Twitter	7%	9%
4	Instagram	4%	6%
5	Snapchat	4%	7%

*used weekly for news

SWEDEN

The news ecology in Sweden has long been characterised by strong public service broadcasters and a large number of local quality newspapers, but is increasingly marked by weaker news organisations having much of their reach through mobile and social media.

STATISTICS

Pop	**10m**
Internet penetration	**95%**



In 2015 the three PSBs together received a total of around 8 billion Swedish krona (just under €1billion) in licence fees, with just a minor part being spent on news. The national television broadcaster TV4 continues to be one of the most financially successful in Scandinavia, improving its financial results by 3% at the same time as reducing its news output. Televised news from SVT and TV4 is still the most popular among Swedes, closely followed by online news.

The newspaper sector – the backbone of the Swedish news ecology – continued to lose circulation (down 6%) along with print advertising revenues (down 15%). Newspapers had a 15% share of the expanding advertising pie in 2015 (32.9 billion SEK/€3.5billion), with web and mobile now accounting for almost 40% of total spend.

Major newspaper titles are owned by large media companies/groups such as Bonnier (*Dagens Nyheter* and *Expressen*), Schibsted (*Aftonbladet* and *Svenska Dagbladet*), and Stampen Media Group (*Göteborgs-Posten*). Stampen, which owns a dozen newspapers and other media companies, showed the most dramatic financial improvement, reporting a profit of 66 million SEK/€7.2m in 2015, compared to a 2014 loss of 553 million SEK/€60m. However, Stampen remains burdened by debt and is struggling to survive. Mittmedia owns 28 newspapers and made a profit of 137 million SEK/€14m in 2015, yet has announced plans to cut 130 staff, including 90 journalists in the next few years. One key event in March 2015 was the closure of Mittmedia-owned newspaper *Dagbladet*, which had been in operation for 115 years, and was merged with another title *Sundsvalls Tidning*. There were also launches of online-only local news initiatives, such as Journalistik 24.

Swedish newspaper groups operate a variety of strategies to get people to pay for news online. Only newspapers within the Gota Media group require subscription for all original news content. Other newspapers such as *Aftonbladet* charge for specific premium content, with its so-called Plus subscription. Several newspapers also offer e-paper versions of their newspapers, with *Dagens Nyheter*, *Göteborgs-Posten*, and *Svenska Dagbladet* amongst the most successful in attracting subscribers.[37]

A major concern for publishers has been the fast adoption of ad-blocking in Sweden (27%), one of the highest rates in our international survey (seventh place). In response 90% of publishers have signed up to a plan to collectively block all content from people using ad-blockers as part of a wider educational initiative about the damage that may be caused to journalism.[38]

A key finding in the survey data is that Swedes – alongside the populations of South Korea and Switzerland – turn to their smartphone for news more than computers. This is partly because Swedish legacy news media have been developing mobile news services, sites, and applications for many years.[39] *Aftonbladet* and *Expressen* both have the majority of their online news accessed via mobile devices. *Aftonbladet* has held an uncontested number one position for online news since launching its news site in 1994: a result of substantial and consistent investment in online journalism – even during economic downturns. Schibsted-owned Omni is a popular mobile news website and app (10% reach) which aggregates news from Swedish and international news media.

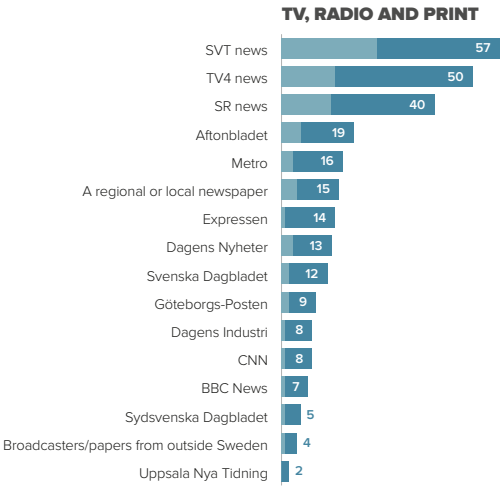
Oscar Westlund
Associate Professor, Department of Journalism, Media and Communication, University of Gothenburg

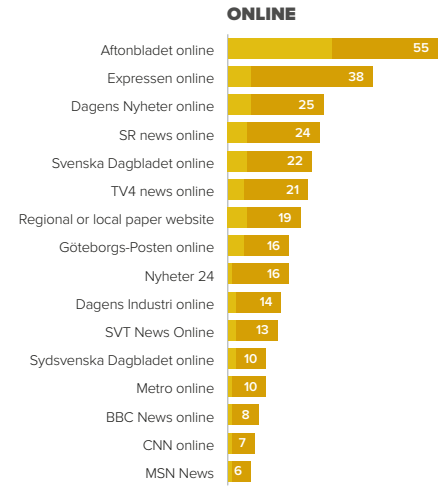
[37] *Medieborgarna & medierna: En digital värld av rättigheter, skyldigheter – möjligheter och ansvar.* Stockholm: Elanders, SOU 2015: 94.
[38] http://digiday.com/publishers/swedens-publishers-gearing-block-ad-blockers/
[39] O. Westlund, 'Mobile News: A Review and Model of Journalism in an Age of Mobile Media', *Digital Journalism*, 1/1 (2013): 6–26.

TOP BRANDS

% Weekly usage

Weekly use *TV, radio & print*
Main source *TV, radio & print*
Weekly use *online brands*
Main source *online brands*

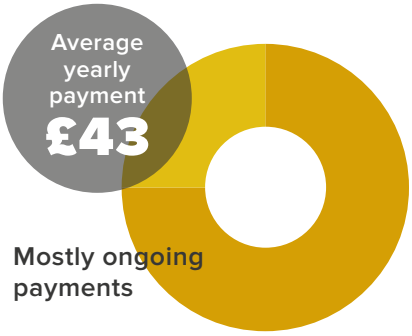




PAYING FOR NEWS

Many newspapers have some form of paywall for online news, which helps explain why Sweden has one highest rates of payment (20%) in this year's survey.

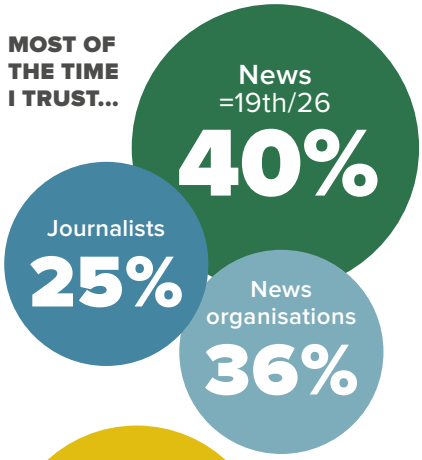
PAY **20%**
pay for online news
(=4th/26 countries)



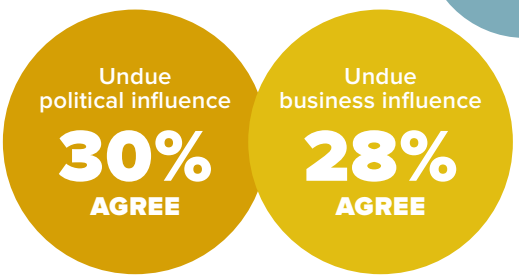
TRUST

One possible explanation for relatively low trust scores is the growth in right-wing groups known for criticising legacy news media, and who are increasingly turning to so-called alternative media (e.g. social media). In other surveys, we see a significant gap between news media deemed trusted (typically SVT, SR, or a newspaper they personally subscribe to) and media that is not trusted (typically tabloid newspapers).

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **64%**
Tablet **34%**
Smartphone **69%**

AD BLOCKER

27%
use ad blockers.
(7th/26 countries)
41% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **72%**
Radio **47%**
Print **43%**

Social media **56%**
Online (incl. social media) **89%**

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	42%	43%
2	YouTube	11%	13%
3	Twitter	8%	10%
4	Instagram	5%	6%
5	LinkedIn	3%	3%

*used weekly for news

FINLAND

The media environment in Finland is characterised by a strong regional press, a strong public broadcaster (YLE), one important national daily (*Helsingin Sanomat*), and two popular evening tabloids, both reaching half of the population online.

STATISTICS

Pop	**5.5m**
Internet penetration	**94%**



Print circulations have continued their decline in 2015. This is a serious problem for newspaper companies, because most of their revenue still comes from print. The biggest daily newspaper, *Helsingin Sanomat* lost 6% of its circulation, and the second biggest daily, *Aamulehti*, also lost 6%.[40] Advertising expenditure in printed newspapers decreased 8% while total media advertising spend was down 2%, and online advertising up 7%.[41] The turnover of listed Finnish media companies is also falling, with Sanoma Media Finland reporting a reduction of 10% and Alma Media down 1%. The listed media companies, however, continue to be profitable, the operating profit income ranging from 2% (Sanoma Media Finland) to 11% (Ilkka).[42]

Traditional Finnish media companies have sustained their strong audience position in online with limited competition from home-grown pure player Uusisuomi.fi (10% weekly reach) and popular news aggregator Ampparit.com (11%).[43] The Finnish language and small market seem to shield national news brands somewhat from international competition. Other reasons for the popularity of traditional Finnish media companies online are the amount of free content still available (especially the evening tabloids and YLE) combined with soft paywalls, bundled subscriptions, and the strong Finnish reading tradition.

YLE's position was actively debated in 2015 with the government's decision to freeze the index-linked increase in YLE's funding criticised by the opposition. Meanwhile a parliamentary working group is reviewing YLE's mission and funding against the backdrop of criticism from private publishers over its strength in digital.

Newspapers in Finland have differing strategies regarding paid online news. The evening tabloids have mostly free offerings while two thirds of daily newspapers use paywalls. They are easing their print readers' way into digital by offering bundled subscriptions at a similar price to – or just a little higher – than print-only subscriptions. They are also looking for the right digital-only price point, which can vary from 35% (*Etelä-Saimaa*) to 73% (*Iisalmen Sanomat*) of the cost of a bundled subscription.[44] With reasonably priced digital services, Finnish media companies are continuing to reach out to those who are no longer willing to pay for print.

In 2015, Alma Media underwent some major corporate restructuring. It sold some of its less profitable regional newspapers and merged with Talentum, the publisher of some leading magazines specialising in financial news and technology. Alma Media already owned a leading business newspaper, *Kauppalehti*, and the merger now strengthens Alma Media's position as a provider of economic and business journalism. Sanoma, for its part, is selling its regional newspapers in Eastern Finland to a local publisher and it has recently also sold many of its magazines.

At the beginning of 2016, Finland's biggest commercial broadcaster MTV, together with a number of partner companies (mainly with a background in newspapers), established a new video network that offers MTV's videos for the partner companies' use. It also sells advertising into the videos produced by the partner companies. This new network competes with Sanoma's Ruutu video network and with international competitors like Google and Facebook.

Esa Reunanen
University of Tampere, Finland

[40] http://mediaauditfinland.fi/

[41] https://www.tns-gallup.fi/sites/default/files/press_release_media_advertising_expenditure_year_2015_finland_.pdf

[42] Without non-recurring items and without Ilkka's share of Alma Media. Source: Suomen Lehdistö 2/2016.

[43] Although Uusisuomi.fi has adopted its name from a former newspaper it is a new enterprise and is classified here as a pure player.

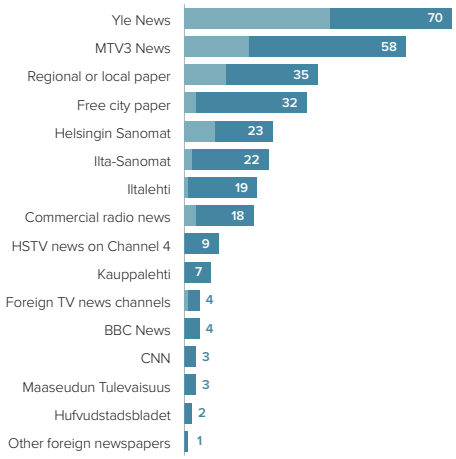
[44] According to a recent survey that included newspapers that offer subscriptions and appear six or seven times a week. Source: Suomen Lehdistö 1/2016.

TOP BRANDS

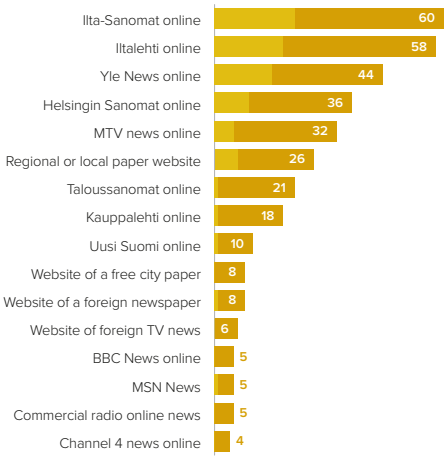
% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

TV, RADIO AND PRINT



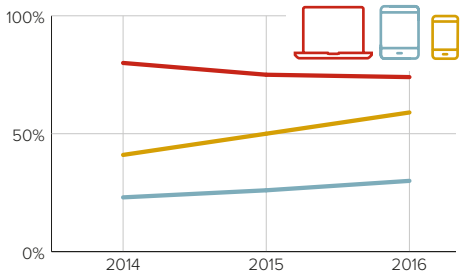
ONLINE



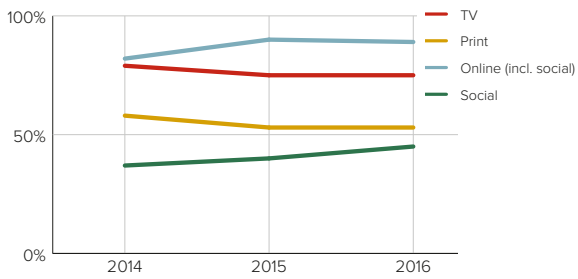
CHANGES IN MEDIA USAGE 2014–2016

Finnish people have embraced online media, but not at the expense of broadcast news. The printed newspaper sector is declining more slowly than elsewhere due to a strong reading culture.

WEEKLY REACH PER DEVICE



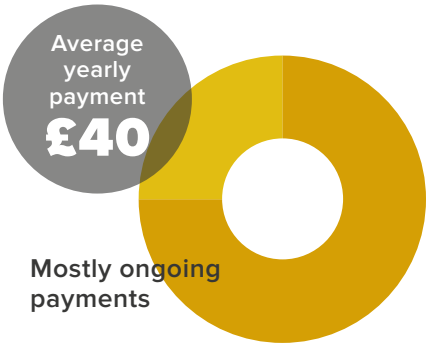
SOURCE OF NEWS 2014–16



PAYING FOR NEWS

A strong tradition of subscription has made it easier to transition to paid content online. But growth is slow and of those not already paying, three quarters (74%) say they would not do so in the future.

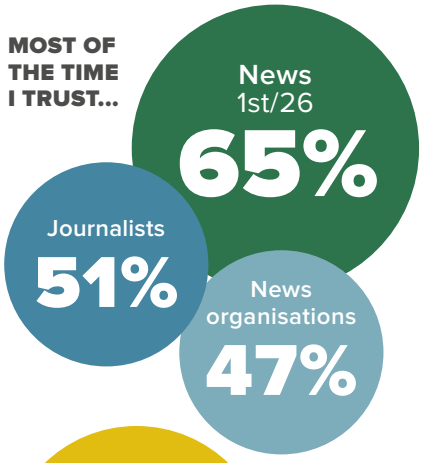
PAY **15** % pay for online news (=7th/26 countries)



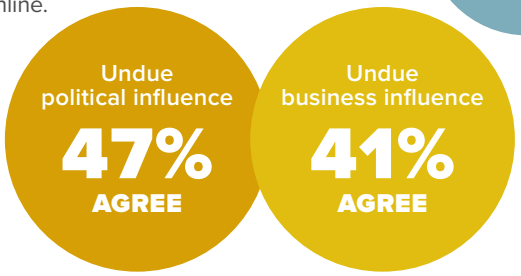
TRUST

Mainstream news organisations in Finland are not politically partisan and journalists have a strong professional culture that values objectivity and independence. The heated debate around immigration policy, however, has somewhat challenged the trust in the media's neutrality. On the other hand, this same debate has also highlighted the news media's role as a trustworthy alternative to disinformation online.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



AD BLOCKERS



24% use ad blockers. (=12th/26 countries)

39% under 35.

TOP SOCIAL NETWORKS*

RANK		NETWORK	ALL	U35s
1		Facebook	34%	42%
2		YouTube	9%	8%
3		Twitter	6%	9%
4		WhatsApp	6%	10%
5		Suomi 24	5%	2%

*used weekly for news

DENMARK

The media environment continues to be characterised by strong public service broadcasters (DR and TV2) and a strong national press, but the presence of public service media online is under increasing pressure from private media and government politicians.

STATISTICS

Pop	**5.5m**
Internet penetration	**96%**



In the newspaper sector, industry readership figures indicate that the steady decline in printed newspaper sales stabilised in 2015, however average figures conceal significant differences between titles that have seen readership growth and those titles that continue to decline.

The acquisition of Denmark's oldest newspaper group Berlingske by the Belgian De Persgroep resulted in substantial staff layoffs, the selling of its local and regional newspapers, and a 'superbrand' strategy concentrating on the three national titles *Berlingske* (quality), *BT* (tabloid), and *Weekendavisen* (weekly niche paper). Another consequence was the closing of the Berlingske news agency, leaving Ritzau as the sole Danish operator with this function.

The flipside of Berlingske's sell-off has been the substantial growth of the regional-local conglomerate Jysk Fynske Medier, which has become a strong, and in many places the sole, actor in provincial Denmark, as well as being the nation's second largest newspaper operator after JP/Politiken.

Thanks to the reformed media subsidy scheme, a number of new digital-born players have emerged on the newspaper scene, with Zetland and Føljeton as the most ambitious and innovative attempts to rejuvenate online journalism through background and in-depth coverage from non-conventional angles of a handful of selected issues every day. The coming year will see a testing of the sustainability of their no-advertising, subscription-based business models.

Older Danish digital-born news providers (dagens.dk, avisen.dk, altinget.dk) seem to have consolidated their role in the media scene through continued but modest growth in readership. International digital-born players like BuzzFeed and the Huffington Post hardly register in Danish readership surveys.

Public service as well as private news producers (with the exception of metroxpress) remain sceptical that the advantages of embracing the news initiatives of global operators like Facebook Instant Articles and Apple News will eventually outweigh the disadvantages of giving up distribution control over their news products.

As the willingness to pay for online news grows only incrementally, there has been increasing concern about the rapid take-up of ad-blocker software (now used by 24%) and its adverse effects on news producers' business models. One counter measure from news providers has been the development of advertorial content strategies by some newspapers, amidst warnings that this may in the long run jeopardise news credibility among readers.

The use of social media for news continues to soar, with other social media operators dwarfed by Facebook as the unrivalled market leader in Denmark.

PSB news providers continue to lose audiences for their offline products – TV more so than radio – but still attract more than half the population on a weekly basis, and almost two-fifths consider them jointly as their main offline news brand. This decrease is more than counter-balanced by the growth in users online, where private newspapers' fears of being outcompeted have led to repeated calls for politicians to curb the online services of public service media, especially licence-financed DR. The change of government from a centre-left coalition to a centre-right one in 2015 brought politicians to power who are more responsive to the arguments of private interests, making future regulation, or self-regulation, of DR's news services a not unlikely scenario.

The newcomer (2012) public service talk radio channel 24syv has now attained its goal of reaching half a million listeners per week, perhaps reflecting the general increase in radio listening after years of slow decline.

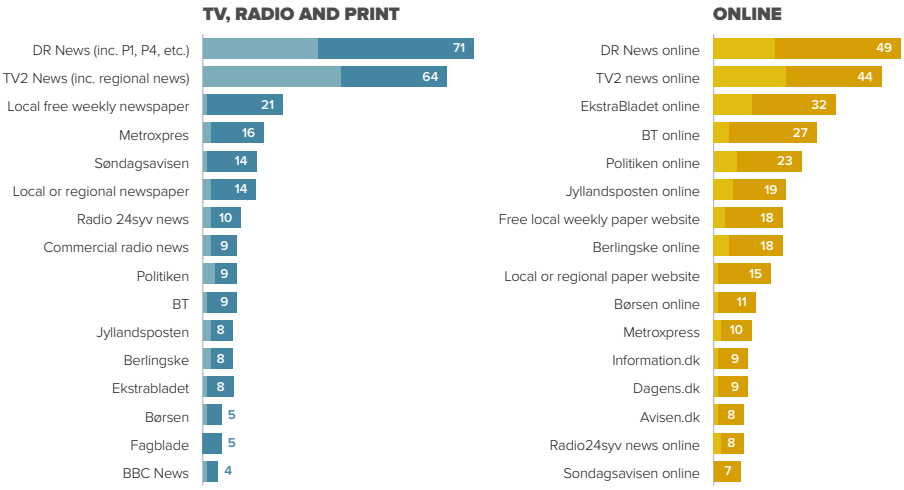
The Danes' belief in the relative political and commercial independence of their news media may owe its existence to the fact that, alongside prominent arm's length-based public service media, most Danish newspapers are run by not-for-profit foundations.

Kim Christian Schrøder and Mark Ørsten
Roskilde University

TOP BRANDS

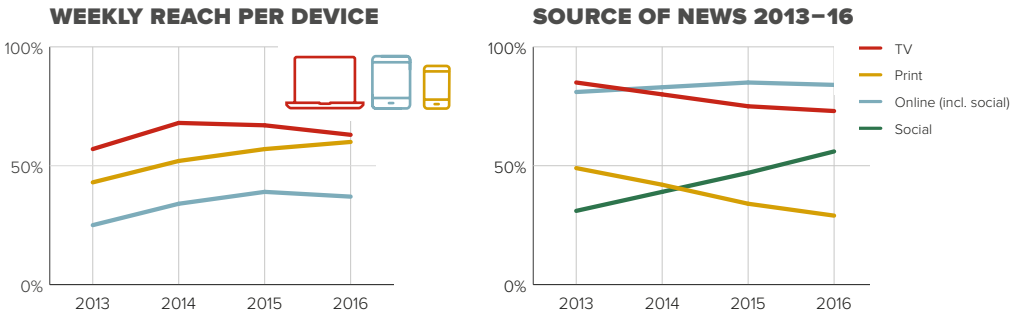
% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*



CHANGES IN MEDIA USAGE 2013–2016

Denmark has adopted smartphones and tablets faster than in many other countries with online overall now ahead of TV news. Print newspapers sell fewer copies than elsewhere in the Nordic region.

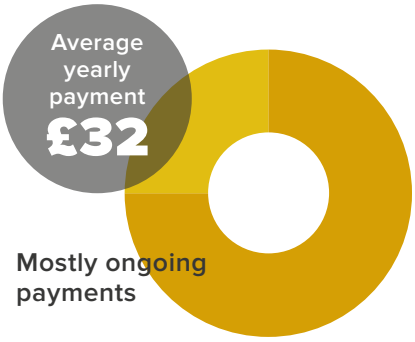


PAYING FOR NEWS

Danish newspaper groups, which compete online with free content from strong broadcast players, use a pragmatic mix of soft paywalls and premium content models to drive revenue.



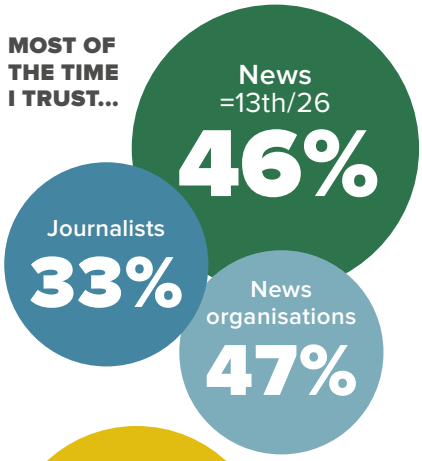
15% pay for online news
(=7th/26 countries)



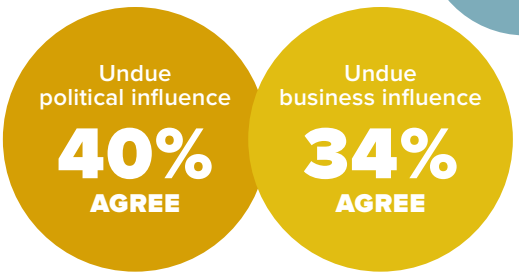
TRUST

The low level of trust in journalists may be due to a number of recent highly publicised scandals. For example, a sports journalist was recently revealed to have produced hundreds of fake news reports for a national tabloid and several magazines, and several journalists have been accused of plagiarising news from international media sources.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



AD BLOCKERS



24%
use ad blockers.
(=12th/26 countries)
39% under 35.

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	43%	48%
2	YouTube	7%	10%
3	LinkedIn	5%	3%
4	Twitter	4%	5%
5	Instagram	2%	4%

*used weekly for news

BELGIUM

Belgium is a small media market, further fragmented by language. It effectively has two distinct publishing sectors for the French and Flemish speaking populations, which account respectively for 33% and 57% of the national population.[45]

STATISTICS

Pop	**11m**
Internet penetration	**85%**



The past year has been marked by a number of media titles changing hands, resulting in the major Belgian news and media groups consolidating their position at home and abroad. The catalyst was a decision by the Finnish media group Sanoma to run down its Belgian activities, after years of consecutive decline in magazine advertising revenues. Two well-established but struggling Dutch-language magazines *Humo* and *Story* were sold to De Persgroep, which saw the group acquiring its main competitors in this segment.

At the same time, Belgian media groups De Persgroep and Mediahuis directed their gaze at the Netherlands, with the former buying Dutch regional media group Wegener in 2014 and the latter buying NRC Media in 2015. Meanwhile the Rossel group, which publishes *Le Soir* amongst other papers, focused its attention on France, where it acquired a 49.3% stake in free newspaper *20 Minutes*.

These changes took place against the backdrop of a continuing decline in newspaper and magazine readership. All newspapers in Belgium sold fewer copies than the year before, though some were able to report rises in total readership, when factoring in digital editions. Dutch-language titles *Het Belang van Limburg*, (+0.7%), *De Morgen* (+2.7%), *De Tijd* (+2.1%) and *Gazet van Antwerpen* (+0.1%) grew slightly. *De Standaard* (-0.3%), *Het Nieuwsblad* (-1.3%) and *Het Laatste Nieuws* (-1.9%) lost readers, even if the latter two remain the top online news brands.

The decline has been steeper amongst French-language newspaper groups, where only financial newspaper *L'Echo* (+0.7%) grew readership and *La Dernière Heure* (-8.7%) and *Le Soir* (-5.2%) are amongst the heavy losers.[46] The historically strong orientation of the public to French media brands might offer an explanation for this difference.

Against this background it is not surprising that publishers have been looking at consolidation and cost-cutting, raising fresh concerns about job losses, media pluralism, and editorial independence. The Mediahuis purchase of NRC Media comes only one year after the group emerged from the merger of Concentra and Corelio, which saw one in five jobs lost. Sanoma's exit has resulted in 65 lay-offs while De Persgroep has started to actively exchange news articles between its Dutch and Flemish titles. Recently, it launched Topics, a news app that offers subscribers a Spotify-style all-you-can-read offering of articles coming from all its Dutch and Flemish newspapers.

The economic climate has also impacted on Dutch- and French-language public broadcasters VRT and RTBF, both of which face severe budget cuts in the coming years. VRT still holds a strong position in the Flemish offline news market, but has struggled to translate this into digital readership. Following VRT's renegotiation of its agreement with the Flemish government, commercial media groups have been stepping up pressure on VRT to limit its online activities around news. The new management agreement requires VRT to focus on the digital development of its existing audio-visual offering, rather than expanding into new areas. RTBF is subject to similar restrictions after a complaint by the newspaper publishers to the European Commission.

Belgium, being a small market – itself made up of two smaller regional markets – with plenty of news titles, is still short of successful digital-born media brands. Even so, Dutch-language BuzzFeed-like news site Newsmonkey was launched in early 2014 by former print journalists. It ended 2015 with a record of 1.9m unique monthly visitors (6% in Flanders)[47] and has also now launched a French-language version of the site. Newsmonkey offers a mix of free news aimed at a younger audience and regularly experiments by offering content through Periscope, Snapchat, and WhatsApp.

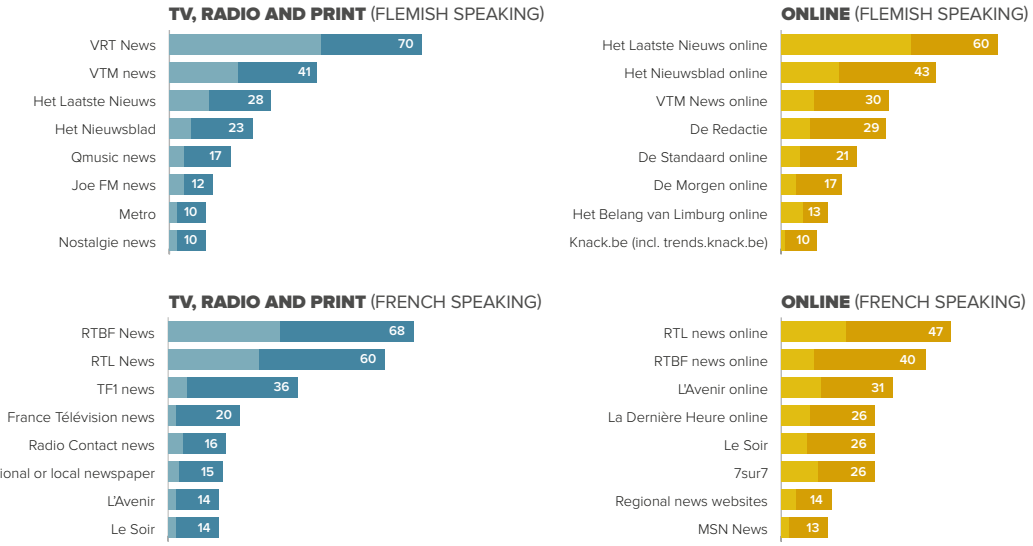
Ike Picone
Vrije Universiteit, Brussels

[45] The bilingual Brussels region accounts for the remaining 10%.
[46] http://www.cim.be/nl/pers/echtverklaring-resultaten
[47] http://newsmonkey.be/article/62838

TOP BRANDS

% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

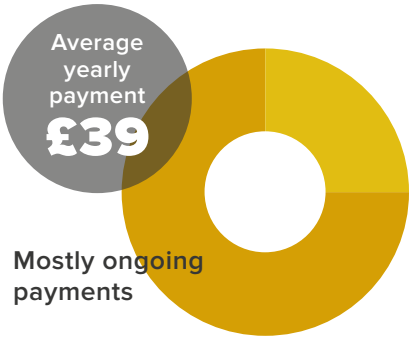


PAYING FOR NEWS*

Belgian news brands use various strategies to charge for online content including metered paywalls, premium content subscriptions and syndication.

PAY **12%** pay for online news (=9th/26 countries)

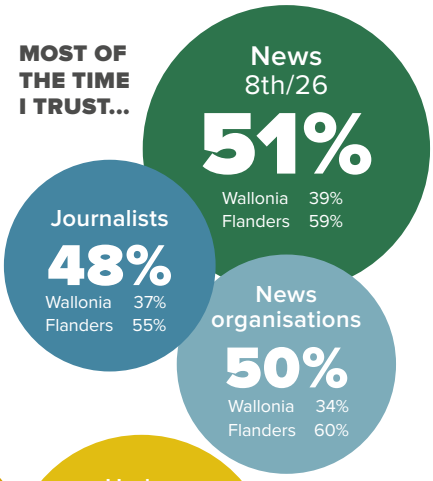
Wallonia 11%
Flanders 13%



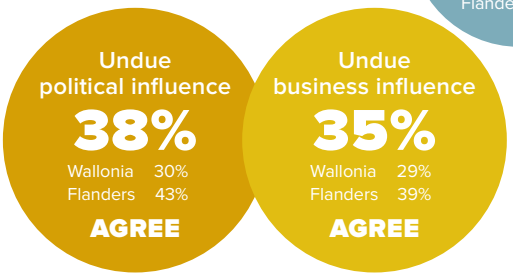
TRUST*

News brands enjoy high levels of trust in Belgium, which might be due to a general lack of explicitly partisan media, no recent scandals involving the press and well-functioning self-regulation through the Council of Journalism. There is, however, a remarkable difference in trust levels between Flanders and Wallonia, with much higher levels of trust in Flemish speaking areas.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE*

Computer 70%
Wallonia 72%
Flanders 69%

Tablet 20%
Wallonia 19%
Flanders 22%

Smartphone 39%
Wallonia 41%
Flanders 37%

AD BLOCKER*

23% use ad blockers. (=15th/26 countries)

Wallonia 29%
Flanders 18%

39% under 35.

WEEKLY NEWS REACH PER SOURCE*

TV 75%
Wallonia 78%
Flanders 73%

Radio 46%
Wallonia 43%
Flanders 50%

Print 45%
Wallonia 38%
Flanders 50%

Social media 46%
Wallonia 48%
Flanders 45%

Online (incl. social media) 82%
Wallonia 82%
Flanders 83%

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	**42%** (41%/43%)	**52%** (53%/55%)
2	YouTube	**15%** (11%/21%)	**12%** (8%/18%)
3	Google+	**4%** (4%/6%)	**2%** (1%/3%)
4	Twitter	**4%** (3%/5%)	**5%** (6%/4%)
5	WhatsApp	**4%** (4%/4%)	**5%** (5%/5%)

*NatRep figures, followed by separate figures for (Flemish speaking Flanders/French speaking Wallonia)

NETHERLANDS

The Dutch media market is characterised by a diverse public broadcasting system, a range of commercial broadcasters, a highly concentrated print sector, and a growing number of online-only players.

STATISTICS

Pop	**17m**
Internet penetration	**96%**



Dutch news organisations, both established brands and new players, are increasingly focusing on digital innovation. A variety of initiatives, ranging from De Correspondent (online quality news via subscription), Blendle (new aggregated distribution channel), and De Coöperatie (organising freelance journalists), are experimenting with new models for journalism in a digital era. At the same time, traditional media such as newspapers and television have to balance making money via their declining but still profitable offline products with moving their brands to online.

Dutch newspapers continue to face declining print circulations; only national quality papers *de Volkskrant* and *Trouw* managed to grow. The largest popular newspaper in the Netherlands, *De Telegraaf*, is struggling financially and has reduced its editorial staff, although it still remains one of the most important news brands in the country both online and offline. As a result of the decreasing revenues, we see a growing concentration of media ownership. In 2015, Belgian publishing house De Persgroep bought regional newspaper chain Wegener, and therefore now owns 45% of the newspaper market, with the Telegraaf Media Groep holding 35.2% of the market share.[48]

Public broadcaster NOS remains the most important offline news brand in the Netherlands. Starting in 1999 far ahead of competitors, NU.nl continues to be the most popular Dutch news website, although newspapers *De Telegraaf* and *Algemeen Dagblad* and broadcaster NOS have caught up over the past 15 years.

Local news remains popular amongst Dutch audiences with regional newspapers ranking third in the list of top offline news brands. Regional TV and radio news also score relatively highly.

Rating figures show that the time Dutch people spend watching live television has declined by 4.8% over the past year.[49] However, watching broadcasts on-demand or online is becoming increasingly popular, facilitated by services such as NPO Gemist (PSB), RTL XL (RTL), and Kijk (SBS). The Dutch Parliament has heavily debated proposals by Secretary of State Sander Dekker to revise the national Media Act to increase the power of NPO, the umbrella organisation of Dutch PSBs. The plan would also limit broadcasters to content that has a clear educational, informational, or cultural purpose. Opponents are concerned that this new policy limits the attractiveness of the public channels and extends the influence of politicians over PSB, especially after the appointment of one of Dekker's party members to the board of NPO.

The widespread adoption of smartphones and tablets in the Netherlands has resulted in an increase in mobile traffic to news websites. Micropayment platform Blendle has grown its number of subscribers to half a million and recently expanded its pay-per-article services to Germany and the United States. Long-form journalism platform De Correspondent, founded in 2013, continues to grow and now has 36,000 members, more than the daily circulation of print newspaper nrc.next.[50] Audience interest in start-ups initiated by traditional publishing houses, such as Mindshakes (NRC), Sportnieuws.nl (AD) or Paper (De Persgroep), remains low.

Because online advertisements yield little revenue – even though ad-blockers have not taken off to the same extent as in other countries – news publishers are seeking alternative sources of income. Blendle's email newsletter generates micropayment sales, Yournalism allows journalists to use crowdfunding to support their reporting, and De Correspondent relies on yearly membership fees. Yet only a minority of Dutch news users spend money on news content: 88% did not pay for access to online news content in the last year.

Joëlle Swart and Marcel Broersma
Centre for Media and Journalism Studies, University of Groningen

[48] Commissariaat voor de Media (2014). Retrieved from: http://www.mediamonitor.nl/mediamarkten/dagbladen/dagbladen-in-2014

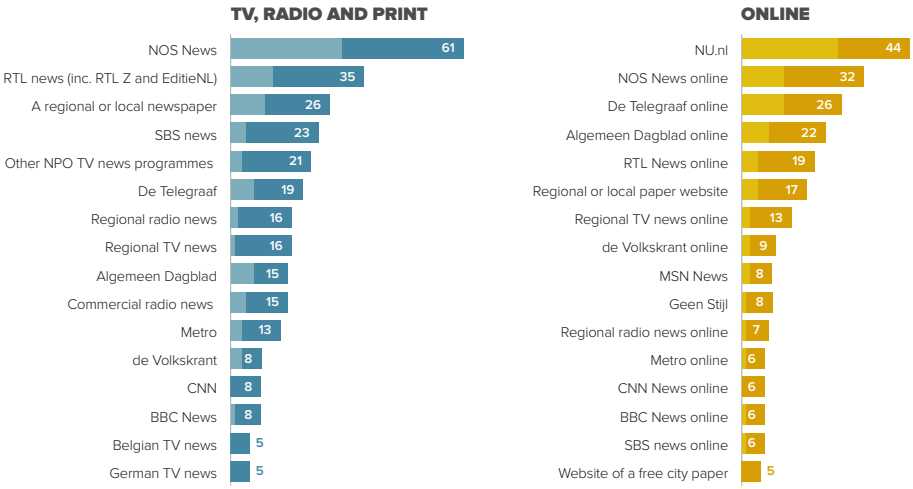
[49] Stichting Kijkonderzoek Jaarrapport (2015). Retrieved from: https://www.kijkonderzoek.nl/images/SKO_jaarrapport_2015.pdf.

[50] Dolf Rogmans, 'De Correspondent weet groei vast te houden', Villamedia, 2015. Retrieved from: https://www.villamedia.nl/artikel/de-correspondent-weet-groei-vast-te-houden. Wilco Dekker, 'Oplagecijfers kranten stijgen dankzij digitale abo's. de Volkskrant', 2015. http://www.volkskrant.nl/media/oplagecijfers-kranten-stijgen-dankzij-digitale-abo-s~a3923288

TOP BRANDS

% Weekly usage

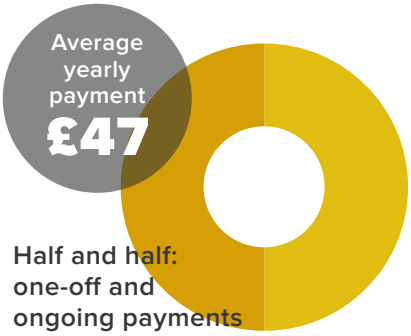
- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*



PAYING FOR NEWS

The Netherlands is home to micropayment platform Blendle, which sells individual articles from a variety of publishers. Most newspapers have also set up paywalls and other direct subscriptions to drive revenue.

PAY **12%**
pay for online news
(=9th/26 countries)

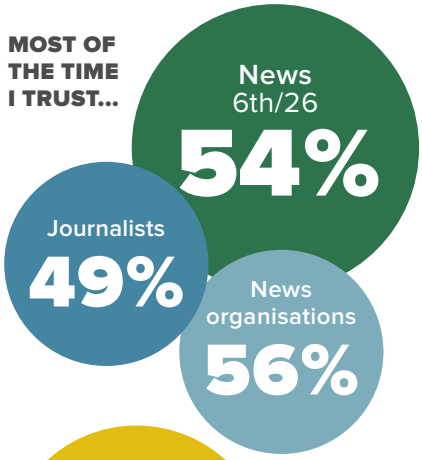


Half and half: one-off and ongoing payments

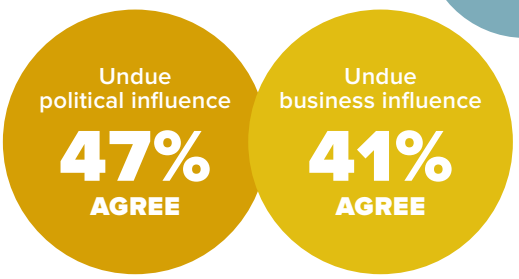
TRUST

Trust in journalists and the media is relatively high in the Netherlands, which unlike, for example, the UK has not recently faced major scandals. There is no strong tradition of tabloid press, nor a history of ties between newspapers and political parties. Commercial broadcasters also bring detached-style quality journalism, comparable to public service broadcasters.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **58%** (-6)

Tablet **30%** (+5)

Smartphone **50%** (+8)

AD BLOCKER

20%
use ad blockers.
(=22nd/26 countries)
34% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **76%** (-4)

Radio **57%** (+9)

Print **43%** (+1)

Social media **47%** (+4)

Online (incl. social media) **81%** (+5)

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	36%	45%
2	WhatsApp	14%	17%
3	YouTube	11%	13%
4	Twitter	8%	9%
5	LinkedIn	5%	4%

*used weekly for news

SWITZERLAND

The media environment is characterised by multiple languages, a strong public broadcaster (SRG SSR), concentrated media ownership, and a number of widely read free newspapers.

STATISTICS

Pop	**8m**
Internet penetration	**87%**



The Swiss media market is small and highly fragmented, subdivided into a large German-language media market, a smaller French-language market in the west as well as a very small Italian-language market in the south of the country, with the media markets of these three language regions further subdivided.[51]

At the same time, media ownership in Switzerland is highly concentrated. There are two large providers: the PSB SRG SSR, present in all parts of the country with its TV and radio programmes (German-language SRF, French-language RTS, Italian-language RSI), and the Swiss publishing house Tamedia AG, present in all three main language regions with its nationwide free paper *20 Minuten*, *20 Minutes* and *20 Minuti* respectively.

Tamedia has acquired many larger and smaller regional newspapers in the last decade such as *24heures* and the tabloid *Le Matin* (giving it almost 40% market share of the press market in the German-speaking region and over 60% in the French-speaking one).[52] Its *Tages-Anzeiger* is also a highly respected supra-regional daily newspaper.

Other significant media players include the NZZ media group, with its *Neue Zürcher Zeitung*, a nationally and internationally highly regarded daily newspaper, as well as with regional newspapers in eastern and central Switzerland, and the multimedia group Ringier AG with its various on- and offline issues of the tabloid *Blick* and the respected French-speaking daily newspaper *Le Temps*.

Switzerland has no significant private broadcasters on the national and language level, but the influence of broadcasters from the large neighbouring countries (France, Germany, and Italy) is very strong. Digital news as an information source has grown rapidly in Switzerland, in particular the news websites of the free papers, the tabloid press as well as the public broadcaster SRG SRR. There are few successful digital-born brands, with the exception of German-language website Watson.ch, launched in 2014, and Bluewin.ch – a news offering from the state-run telecom company Swisscom. International titles such as the Huffington Post and BuzzFeed play a limited role in Switzerland.

The newspaper sector continues to suffer from declining advertising and sales revenues, which are not even close to being compensated by gains made online.[53] Indeed, the willingness of consumers to pay online is just below the European average, and the use of ad-blockers is also relatively widespread.

Despite these problems, Tamedia AG achieved a record profit for 2015, and the NZZ media group also published good results. A significant part of Tamedia's growing profit, however, is due to activities that don't relate directly to news such as directory services and real estate listings.

Even so many Swiss publishing houses are focused on digital innovation. Tamedia AG created a new division called 'Digital News & Development' and the NZZ group has adopted a new management structure. Both NZZ and Ringier's tabloid medium *Blick* are participating in Facebook's Instant Articles initiative, while NZZ is working with the Blendle news platform and has launched new digital news offerings (e.g. fm1today.ch and nzz.at, a new online offering for the Austrian market). Last year, Tamedia AG launched the 12-App, which makes the best articles from various media titles available via a new digital subscription.

Echoing the situation in many other European countries, political pressure on the PSB SRG SSR increased greatly last year. A government report to be published this year will describe the future role of the public news service. In addition, right-wing populist politicians have intensified political pressure and launched a popular initiative which aims to abolish the provision of public funds to the public news service altogether.

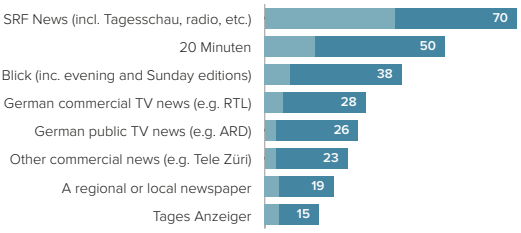
Mario Schranz, Mark Eisenegger, Linards Udris
Research Institute for the Public Sphere & Society, University of Zurich

[51] http://ejc.net/media_landscapes/switzerland – We only surveyed German and French speakers.
[52] http://www.foeg.uzh.ch/dam/jcr:ffffffff-dcb0-8a8e-0000 0000635a6531/Broschur_Jahrbuch_foeg_englisch_2015.pdf
[53] http://www.werbestatistik.ch/index.php?pid=65

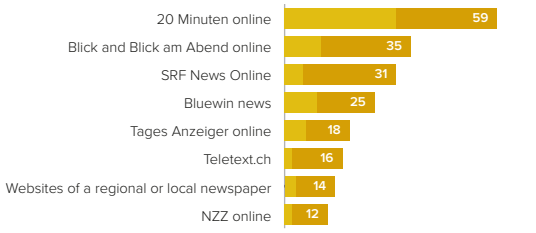
TOP BRANDS
% Weekly usage

Weekly use *TV, radio & print*
Main source *TV, radio & print*
Weekly use *online brands*
Main source *online brands*

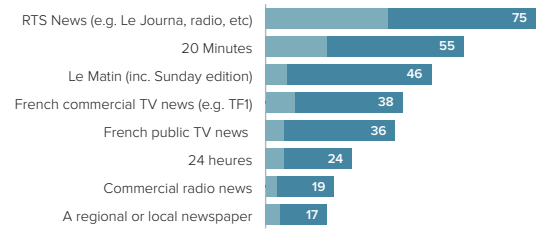
TV, RADIO AND PRINT (GERMAN SPEAKING)



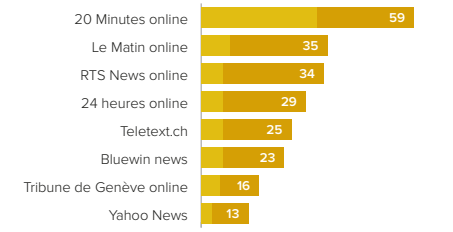
ONLINE (GERMAN SPEAKING)



TV, RADIO AND PRINT (FRENCH SPEAKING)



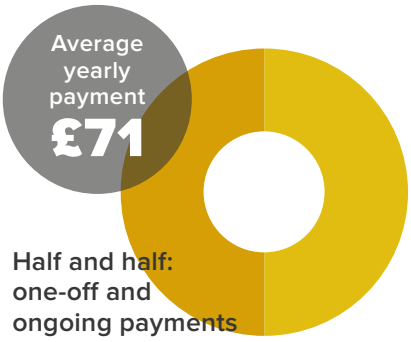
ONLINE (FRENCH SPEAKING)



PAYING FOR NEWS

The introduction of (metered) paywalls to certain online offerings of the Tamedia and NZZ publishing houses has not yet had the desired impact on revenues – though average payment levels are amongst the highest in our survey.

PAY **10%**
pay for online news
(=13th/26 countries)

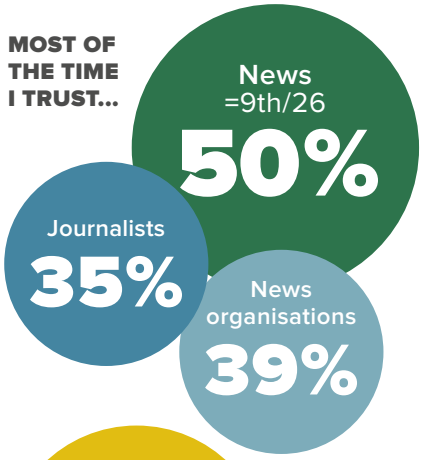


Half and half: one-off and ongoing payments

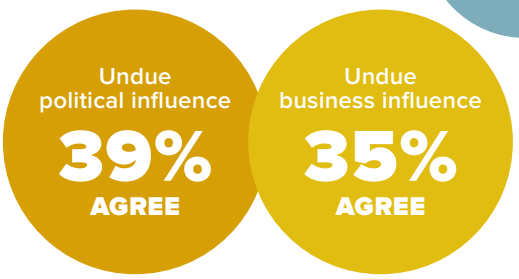
TRUST

Trust in the news in Switzerland is high compared with other countries, although trust in media organisations has suffered. Possible reasons include the overt campaigns against the public broadcaster, the increasing party-political positioning of some news brands, and the growth in the importance of the tabloid and free media in recent years.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **60%**
Tablet **29%**
Smartphone **61%**

AD BLOCKER

20%
use ad blockers.
(=22nd/26 countries)
31% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **69%**
Radio **43%**
Print **63%**

Social media **47%**
Online (incl. social media) **82%**

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	36%	44%
2	WhatsApp	19%	23%
3	YouTube	19%	23%
4	Google+	6%	4%
5	Twitter	6%	6%

*used weekly for news

AUSTRIA

The media environment is characterised by one of the highest printed newspaper consumption rates in Europe and by the dominance of the public broadcaster ORF in the television and online news markets.

STATISTICS

Pop	**8.5m**
Internet penetration	**83%**



In general, 2015 was not a good year for Austrian newspaper publishers, with the most affected brands *Der Standard* and *Kurier* suffering a decrease in sales of more than 6%.[54] The former nonetheless reported a small profit in 2015 following a restructuring plan to reduce costs. There was also a fall in sales for *Die Presse* (about 4%) and for tabloid newspaper *Kronen Zeitung* (about 2%), which remains the bestselling brand nationally with a weekly average of over 760,000 copies.[55] Magazines were also negatively affected with the Verlagsgruppe News (VGN) merging economic magazines *Trend* and *Format* while continuing with the publication of *News*. In contrast with these general trends, the free newspaper *Österreich* is distributing 6% more copies than it did a year ago and regional daily newspapers *Kleine Zeitung*, *OÖ Nachrichten*, and *Salzburger Nachrichten* reported a small increase in sales.

While the consumption of news in Austria is still substantially based on traditional distribution, the use of online channels is growing, with more than 50% now using their smartphones for news. This is partly due to the intervention of the regulator (RTR), which facilitated the establishment and growth of virtual operators such as BOB and YESSS.

Interestingly, our survey shows that there is a stronger preference for local brands and content online than is the case for television, where German channels benefit from relatively high rates of usage. The most popular online brands are the public service broadcaster ORF, whose services are visited by over half of online news consumers, and the online edition of the tabloid newspaper *Kronen Zeitung*. GMX is the only digital news provider listed in the top ten that is not a venture of an Austrian news brand. GMX is a popular German email service that distributes news articles from its portal; most of them contain 'soft news' based on news agencies' reports, although some original content is also part of the mix.

Increased digital news consumption in Austria is partly a result of the growing use of ORF's news apps, most of which were introduced as late as 2014. These apps along with online editions of the main Austrian news brands have slowed the adoption of paywalls as they provide access to large amounts of information free of charge. Commercial publishers have recently started pushing consumers to pay for digital news. *Kronen Zeitung* is currently offering digital subscriptions to its e-paper to print subscribers starting from only €2.50 per month, while *Der Standard*, *Kleine Zeitung*, *Die Presse*, and *Wirtschaftsblatt* are also offering combined print and digital subscriptions.[56]

Despite the increase in the consumption of digital news and the strong appeal of online local content, there are currently only two digital native news providers in Austria. In 2015 NZZ.at entered the scene and joined Dossier.at, which was founded in 2012. The former, which is the Austrian local branch of the Swiss brand *Neue Zürcher Zeitung*, is the only news provider in Austria whose main source of revenue consists of digital subscriptions. However, it suffered from the general low propensity to pay for digital news to the point that NZZ has announced the intention of scaling down its Austrian operations.

In 2015, Austrian news organisations also started to use WhatsApp to promote content. Pioneered by the *Der Standard* in April 2015,[57] a similar service is now also offered by *Kronen Zeitung*, *Die Presse*, and *Ö3*.

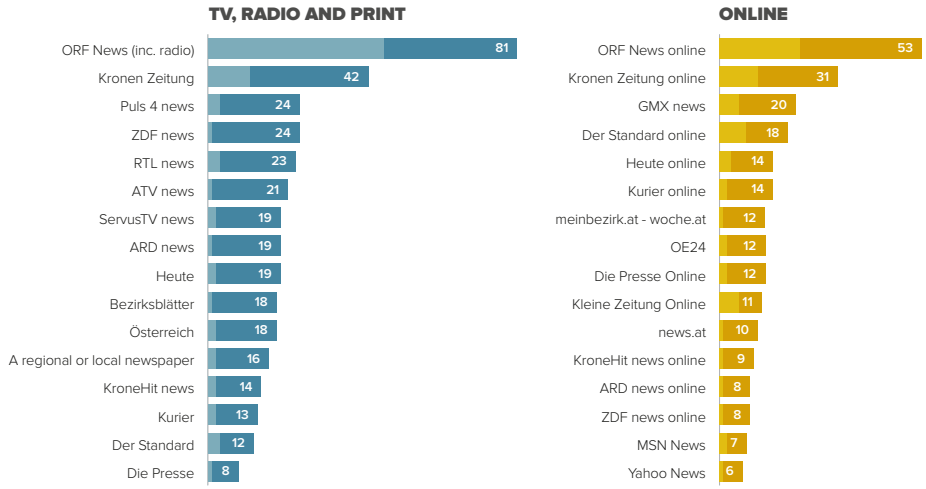
Sergio Sparviero and Josef Trappel
University of Salzburg, with additional research from Stefan Gadringer

[54] The figures in this paragraph are obtained by comparing the data published by the Österreichische Auflagenkontrolle (ÖAK): https://www.oeak.at
[55] Including subscriptions and wholesale. Data from https://www.oeak.at
[56] http://derstandard.at/Abo?ref=AboWidget
[57] http://derstandard.at/2000010646925/Fragen-und-Antworten-zum-WhatsApp-Service-von-derStandardat

TOP BRANDS

% Weekly usage

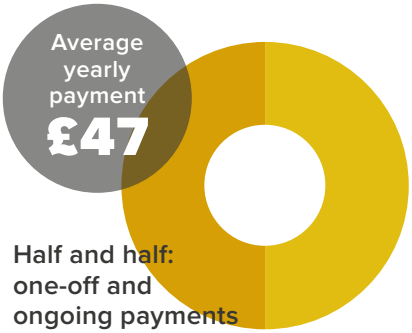
- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*



PAYING FOR NEWS

Austrians remain reluctant to pay for online news, though publishers have been stepping up efforts to charge for content in the last year.

PAY **7%**
pay for online news
(=22nd/26 countries)

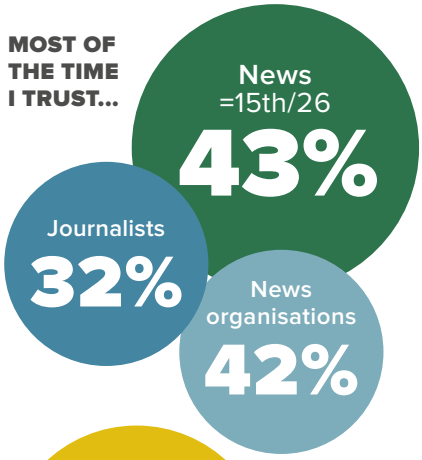


Half and half: one-off and ongoing payments

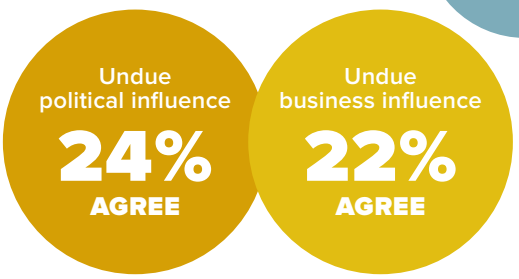
TRUST

Trust in news organisations and journalists is relatively low compared to many other European countries. This can be understood against the backdrop of a growing number of violations of the Code of Ethics reported to the Press Council (Österreichischer Presserat).[58]

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **64%** (-3)

Tablet **21%** (+3)

Smartphone **51%** (+10)

AD BLOCKER

26%
use ad blockers.
(=8th/26 countries)
39% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **76%** (-2)

Radio **46%** (-3)

Print **67%** (-4)

Social media **48%** (+10)

Online (incl. social media) **73%** (+3)

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	35%	49%
2	YouTube	17%	19%
3	WhatsApp	13%	16%
4	Twitter	5%	9%
5	Google+	4%	2%

*used weekly for news

[58] http://www.presserat.at/show_content.php?hid=12

HUNGARY

Hungary's conservative Fidesz party has sought to tighten its control over both the public and private media sector over the past year, leading to increased concerns about journalistic freedom and plurality.

STATISTICS

Pop	**10m**
Internet penetration	**76%**



The media landscape – including the two most watched TV channels – has been through tumultuous, politically driven changes over the last year, with most Hungarian news brands controlled by politically engaged entrepreneurs. In February, a row erupted between PM Viktor Orbán and his former college room-mate, right-wing media mogul Lajos Simicska, triggered by the introduction of a 5% tax on advertising.[59] After Simicska said he was declaring war on Fidesz, a number of his senior media editors resigned, including those from conservative newspaper *Magyar Nemzet*, Lánchíd Radio, and Hír TV.

The advertising tax was also criticised by RTL Klub, a private television channel with the highest-rated TV news programme. After a secret deal between the government and German owner Bertelsmann, RTL Klub's news programme moderated its criticisms and the CEO was fired after 14 years in the job.[60]

TV2 Media Group, which runs one of the other leading TV channels in Hungary was sold to the government film commissioner Andy Vajna in October but this sale is now subject to a legal dispute with a key ally of Lajos Simicska also claiming ownership. TV2's Tények news progamme has lost around 500,000 viewers during the last two years.[61]

At the same time M1, the main public TV channel was reshaped into a 24/7 news channel in March 2015, though early months were affected by a number of technical problems, accusations of pro-government bias, and falling audiences.

Meanwhile, the former editor and co-owner of *Magyar Nemzet* bought financial daily *Napi Gazdaság* in April and renamed it *Magyar Idők* (Hungarian Times), transforming it to a political daily more loyal to the government.

A new law ordering the closure of shops on Sundays, introduced in March 2015 has impacted press circulation. The only political newspaper appearing on Sundays, *Vasárnapi Hírek* (Sunday News) maintained sales by publishing on Saturdays, but the Sunday edition of the biggest daily tabloid paper *Blikk* has seen sales reduced by around a third.

Hungary's biggest daily, *Népszabadság* is now fully owned by Mediaworks Hungary Co, which bought shares from Ringier in 2014 and from the Szabad Sajtó Foundation which is closely linked to opposition socialist party MSZP.

Left-wing political weekly, *168 Óra* was sold to a new owner who says he wants to keep the weekly's political leaning. A free paper *Lokál* was launched in May by the prime minister's unofficial adviser Árpád Habony. Habony also launched a news portal 888.hu mimicking the name of existing liberal news website 444.hu. The ex-editor-in-chief of Origo, one of the leading Hungarian news portals, launched a new investigative group called Direkt36, which is supported by donations instead of advertising, and publishes its articles through 444.hu.

Magyar Telekom, a subsidiary of Deutsche Telekom, sold the second biggest news website Origo to New Wave Media Ltd for almost 4.2 billion HUF (c.€13.2m) in December. New Wave Media, which has links to the government, also publishes vs.hu, another important Hungarian news website. Index.hu remains by far the most popular Hungarian news portal thanks to its relaxed tone and relative independence, although it is owned by a right-wing businessman.

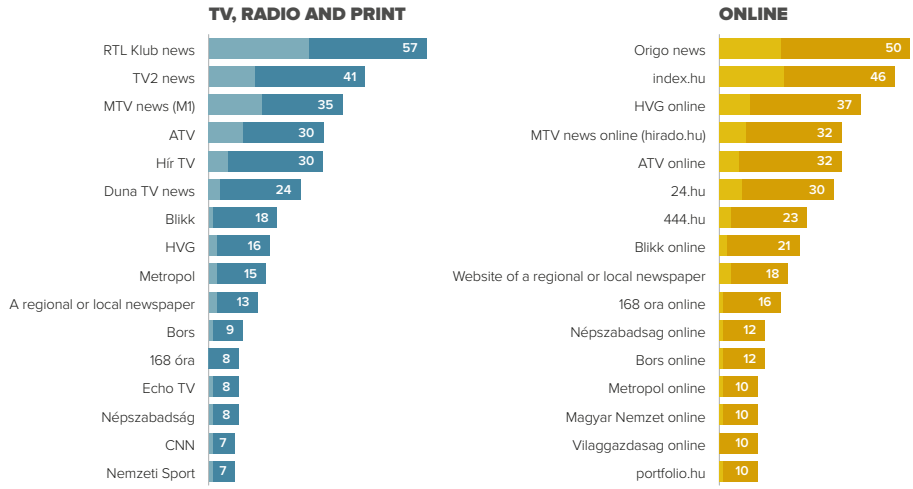
Nic Newman
Research Associate, Reuters Institute, with input from local sources

[59] http://index.hu/kultur/media/2015/02/06/lemondott_a_simicska-medibirodalom_teljes_vezetese
[60] http://www.mmonline.hu/cikk/eldolt_tavozik_dirk_gerkens
[61] http://index.hu/kultur/media/2016/03/23/ket_ev_alatt_tobbszazezer_nezot_vesztett_a_tenyek

TOP BRANDS

% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

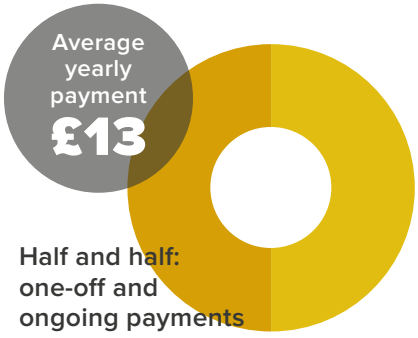


PAYING FOR NEWS

Paying for online news is rare in Hungary with most news websites supported by advertising.

PAY **8%**

pay for online news
(=20th/26 countries)

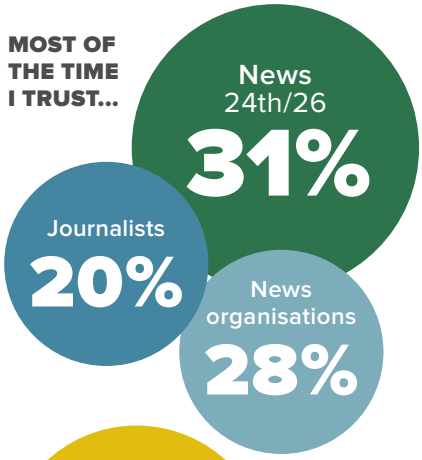


Half and half: one-off and ongoing payments

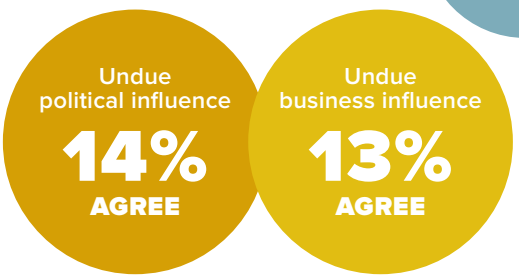
TRUST

The politically polarised media landscape has contributed to the low levels of overall trust. Very few Hungarians think that the media are free from political or commercial influence and the two are often closely linked. Because of the small size of the market there is much less money for in-depth reporting compared to Western European countries.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **74%**

Tablet **12%**

Smartphone **43%**

AD BLOCKER

25%
use ad blockers.
(=10th/26 countries)
43% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **72%**

Radio **25%**

Print **27%**

Social media **64%**

Online (incl. social media) **88%**

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	60%	57%
2	YouTube	22%	23%
3	Google+	8%	4%
4	Twitter	5%	6%
5	Viber	4%	4%

*used weekly for news

CZECH REPUBLIC

The Czech media landscape is characterised by the dominance of commercial television, which attracts about half of the total advertising spend, and by a highly concentrated newspaper sector, mostly in the hands of local business tycoons.

STATISTICS

Pop	**10.5m**
Internet penetration	**80%**



The Czech advertising market has continued to trend upwards – by 8% in 2015.[62] This was mainly due to rising spending on TV (+14%), while print media and outdoor advertising stagnated. Online ad spending has grown to almost a 20% share of the advertising market – around the same as print.[63]

The circulation of Czech newspapers decreased further last year, with most titles having declined by 5–10%,[64] a trend observed across both quality papers and the tabloid press. Some positive news came with the launch of a new weekly news magazine – a local version of *Newsweek*, licenced by its US publisher IBT Media.

The transformation of print media ownership from long-established Western owners to local proprietors continued in 2015. Regional publisher, Vltava-Labe-Press, owner of over 70 local versions of the daily *Deník*, was sold by Verlagsgruppe Passau to the Czech-Slovak investment group Penta – already a significant player on the Slovak print media market. On the other hand, the media market experienced the first significant inflow of capital from Asia, with the Chinese investment company CEFC having acquired a minority share (49%) in the media house Empresa Media, owner of the fourth biggest television broadcaster TV Barrandov and publisher of several news weeklies.

The Czech news media has been trying to deal with declining revenues by inventing new strategies to attract audiences and subscribers online. Economia, which was the first major Czech publisher to try a metered paywall, shifted to a hard paywall for selected content in 2016 following disappointing results. Digital-only subscribers still account for less than 10% of all subscribers of the publisher's flagship, the financial daily *Hospodářské noviny*.

A hard paywall was also announced by the publisher of the biggest-selling Czech tabloid *Blesk*, the Czech News Centre, which has already started to charge for viewing football matches on its online sports portal iSport.cz. Another leading publisher MAFRA has tried a different approach – launching web e-readers for the two quality newspapers, *Mladá fronta DNES* and *Lidové noviny*. The company reported a doubling of digital subscribers,[65] albeit from a very low base given that most of their content remains free of charge.

In an attempt to reach new audiences and take advantage of the new digital multi-channel environment, some news outlets have been introducing audio podcast versions of their news articles or reports. These include weekly publications *Respekt* and *Forbes*, along with the daily *Hospodářské noviny* and the increasingly popular internet TV channel DVTV. This innovative start-up, launched in 2014, presents itself as a web-based public service TV and raised over 2 million CZK (about £60,000) from the public in a successful crowdfunding campaign.

Despite the pressures from both traditional commercial competitors and new digital-born projects,[66] the public service broadcaster Česká televize continues to hold its steady market position, with its flagship channel ČT1 being the second most watched station with a 15% audience share. In combination, the audience for all its channels are roughly equal to that of the stations controlled by the largest commercial broadcaster Nova Group (30.4% vs 30.70%).

Czech search engine Seznam has been gradually losing ground to Google (35% vs 45% of the market share by the end of 2015), but continues to hold the position of the third most visited website in the country behind Facebook.com and Google.cz.[67] This illustrates the continuing attractiveness of the localised online services, which are still important for Czech internet users even in today's globalised digital environment.

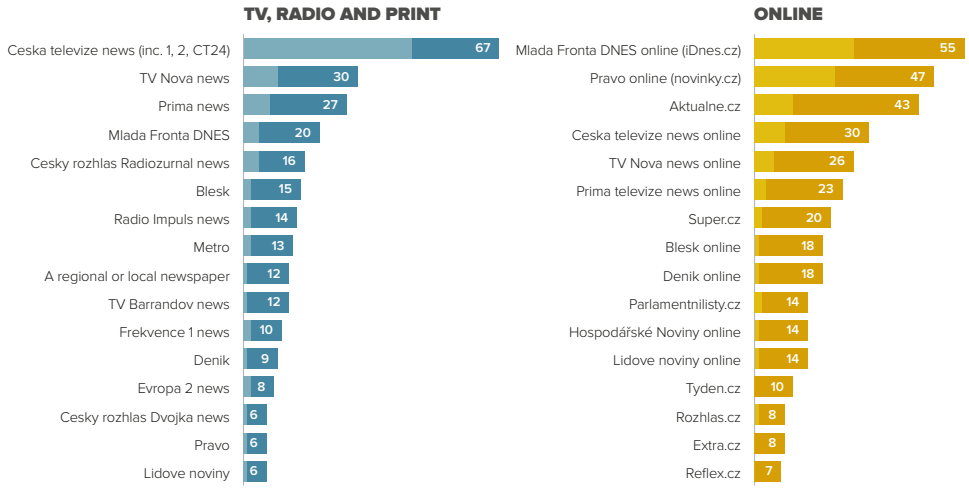
Václav Štětka
Institute of Sociological Studies, Charles University, Prague

[62] http://www.nielsen-admosphere.cz/press/tz-trh-s-reklamou-v-roce-2015-vzrostl-o-temer-8
[63] http://www.inzertnivykony.cz
[64] http://www.abccr.cz/overovana-data/periodicky-tisk
[65] http://www.mediaguru.cz/2015/03/mafra-zavedeni-ctecky-zdvojnasobilo-prijmy-z-obsahu/#.VwThGHohEhQ
[66] Including the TV channel Stream.cz, run by the largest Czech search engine [or internet portal] Seznam.cz.
[67] http://markomu.cz/nejnavstevovanejsi-weby

TOP BRANDS

% Weekly usage

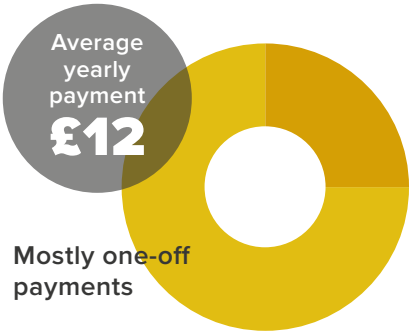
- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*



PAYING FOR NEWS

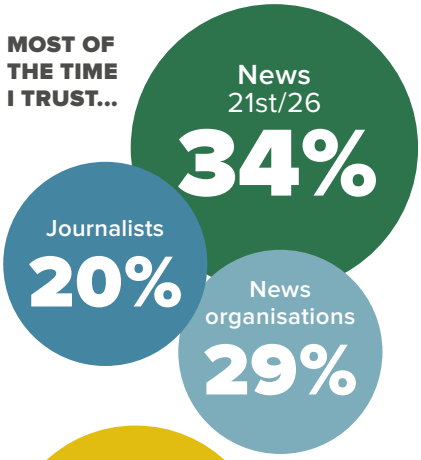
The process of moving towards paid content has been rather slow, as Czech news consumers have consistently shown a lack of willingness to pay for information online.

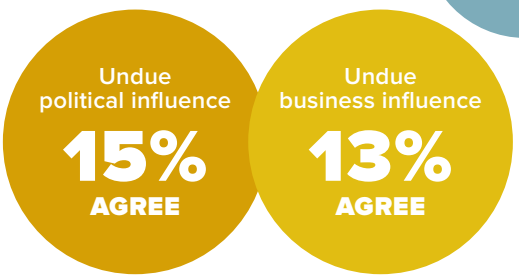
PAY **7%**
pay for online news
(=22nd/26 countries)



TRUST

Low trust in news, news organisations and journalists can be partially explained by the recent ownership changes affecting much of the Czech print media sector. Local billionaires now have considerable influence, including those pursuing political careers, such as Deputy Prime Minister Andrej Babiš, who has owned two quality papers and the biggest commercial radio station since 2013.





WEEKLY NEWS REACH PER DEVICE

Computer **80%** (-3)

Tablet **16%** (–)

Smartphone **40%** (+6)

AD BLOCKER

21%
use ad blockers.
(=19th/26 countries)
31% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **81%** (-4)

Radio **35%** (–)

Print **34%** (-3)

Social media **51%** (+10)

Online (incl. social media) **91%** (–)

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	46%	51%
2	YouTube	22%	21%
3	Google+	5%	3%
4	Twitter	3%	3%
5	WhatsApp	3%	4%

*used weekly for news

POLAND

The Polish media environment is characterised by strong TV channels, embattled newspaper groups, and a number of large and successful web portals. A lively political climate created by the parliamentary election spurred people's interest in news.

STATISTICS

Pop	**38m**
Internet penetration	**68%**



Recent years have been difficult for newspapers in Poland. Despite a rise in overall advertising expenditure, newspaper revenue shrank by 11.5% with circulation continuing to fall year on year.[68]

Both in print and digital, newspapers remain key destinations for news while popular portals battle for supremacy online by developing their editorial operations and investing in original video production. In the autumn of 2015, online web portal Wirtualna Polska (WP.pl) launched a current affairs programme 'Dzieje się na żywo' (Happening live) with two editions running five days a week using professional hosts with a strong background in print journalism. In the last week of February 2016, the programme was delivering 4.5m streams. Soon afterwards Onet.pl, the biggest portal in Poland and WP's key competitor, raised the bar by launching six live programmes, some of them hosted by former TV anchors.

Meanwhile WP is moving into digital terrestrial television (DTT), winning a transmission slot for an interactive TV channel called WP1 due to be launched in the second half of 2016. Wirtualna Polska (WP) also used its vast cash reserves to buy Open.fm, a radio streaming platform – as well as a group of e-commerce and travel websites.

Television remains a key source of news in Poland, with three big players, PSB TVP, Polsat, and TVN. The latter is now owned by the US-based Scripps network and runs the most successful TV news channel in Poland and Central Europe. TVN is also a key source of online news.

PSB has been in turmoil since the election in October 2015. Parliament passed an amendment to the media law that gives the Treasury Minister the power to hire and fire the management of TVP and Polskie Radio – a move criticised by both the EU and EBU. The Law and Justice Party (PiS), which won a clear majority in October elections, had argued that journalists on public service channels were biased against them. Under pressure, the broadcaster is now taking a pro-government line on many issues. In March, TVP's flagship evening news programme *Wiadomości* lost 644,000 viewers (a fall of 17%). Undaunted, the new government plans further changes – replacing a licence fee with a new tax; transforming TVP and Polskie Radio into 'national cultural institutions' run by directors, but in reality under control of the Culture Minister; and creating a single media-buying agency to consolidate the ad budgets of state enterprises.

Poland has the highest level of ad-blocking in our survey at 38%. This could be attributed to news websites overloaded with ads, but it may also be driven by heavy usage of illegal video streaming services, which also carry extremely intrusive advertising.[69]

Rising ad-blockers and falling online ad rates have pushed publishers to adopt paid content strategies and new forms of advertising, such as branded and sponsored content. Both strategies have been working up to a point. Natemat.pl, which has built its revenue almost exclusively on native ads reached break-even point in 2015. At the same time the number of paid digital subscriptions for the leading quality newspaper, *Gazeta Wyborcza*, has reached more than 77,000 (vs 22,000 at the end of 2014).

A Polish pay-as-you-go news system called Webnalist emerged in September. Its founders call it a 'nanopayment platform' where reading an individual story can cost as little as 0.01 PLN (virtually 0 GBP).

Poland scores highly in terms of paying for digital news. A growing number of streaming services in Poland – Deezer, Tidal, Spotify (music), Netflix (movies), Storytel (audiobooks), and Legimi (e-books) – may have partially normalised the idea of paying for digital content.

Vadim Makarenko
Journalist at Gazeta Wyborcza, and former Reuters Institute Journalist Fellow

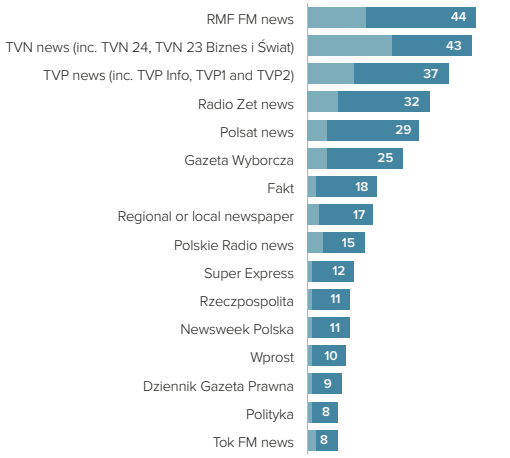
[68] http://www.agora.pl/im/2/19853/m19853372,RAPORT-S-2015-PL.pdf
[69] http://variety.com/2015/digital/news/house-of-cards-season-3-pirated-with-china-top-country-for-downloaders-1201444023

TOP BRANDS

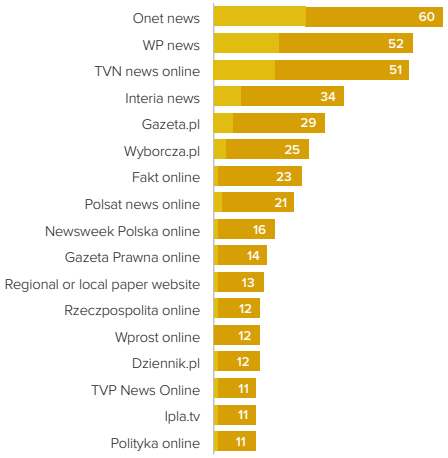
% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

TV, RADIO AND PRINT



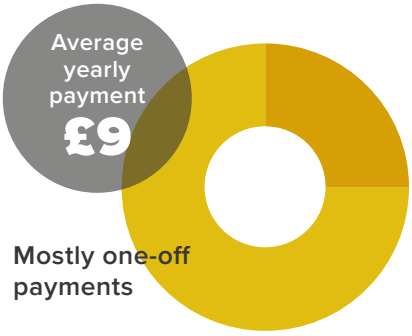
ONLINE



PAYING FOR NEWS

Poland has an impressive headline rate but most online payments are one-off rather than for ongoing subscriptions. The average yearly payment is amongst the lowest in our survey.

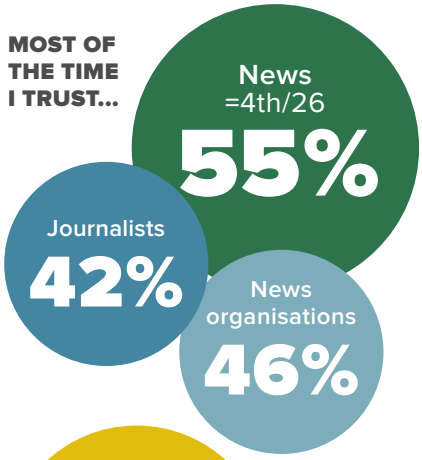
PAY **20%**
pay for online news
(=4th/26 countries)



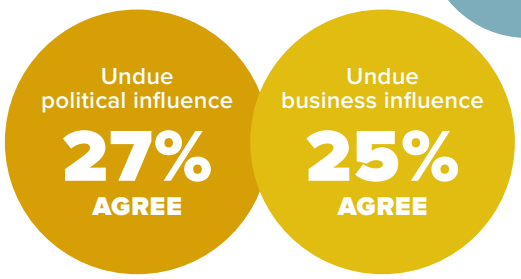
TRUST

Historically, public trust in the media and journalists has been high in Poland, though it has fallen in recent years. 2015 was a year of parliamentary and presidential elections with highly politicised media coverage – and this has become even more partisan since.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **75%** (-6)

Tablet **18%** (–)

Smartphone **58%** (+6)

AD BLOCKER

38%
use ad blockers.
(1st/26 countries)
56% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **80%** (-1)

Radio **42%** (-1)

Print **32%** (+4)

Social media **58%** (+6)

Online (incl. social media) **82%** (-2)

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	50%	54%
2	YouTube	31%	35%
3	Google+	9%	4%
4	Twitter	9%	6%
5	Nk.pl	3%	1%

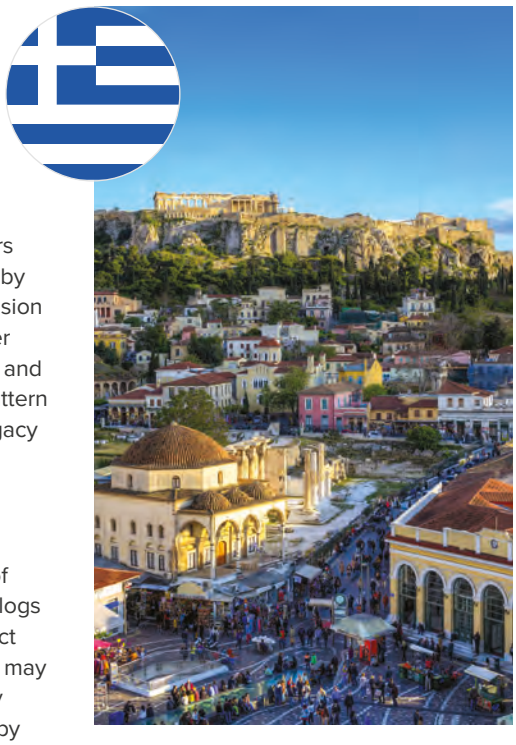
*used weekly for news

GREECE

The media market in Greece is characterised by low trust and low use of traditional media (including a weak newspaper market) alongside some of the highest use of social media and digital-born outlets in our study.

STATISTICS

Pop	**11m**
Internet penetration	**63%**



The Greek media system has been hit hard by the financial crisis. As one example, the financial turnover for television production in 2015 was half of what it was in 2010.[70] The newspaper industry, which was never as strong in Greece as in Northern Europe, has also faced strong pressures, and the average circulation for Sunday newspapers has also halved since 2009.[71]

In the television market, the old brand name for the Public Service Broadcaster (ERT) made a comeback in 2015 replacing the previous government's attempt to rebrand it as NERIT. Despite the turmoil and constant relaunches, ERT news is still accessed weekly by over a third (38%) of respondents and is the main source of news for 14%. In the private TV news landscape, both the survey data and TV ratings[72] show that ALPHA news viewership is now strong, surpassing ANT1 and MEGA which have been the two biggest broadcasters since the launch of private TV in Greece, 26 years ago. In addition, SKAI, a broadcaster that took an open political stance during the recent referendum and covered the political developments of 2015 extensively, has built a loyal core audience. While the percentage of Greeks using TV as their *main* news source is the lowest in the 26 countries (21%), 66% still use it for news, with low numbers recorded partly due to our use of an online panel.

In the newspaper market, the most successful Sunday newspapers today are (at least partly) published by journalists known mainly from television (*Proto Thema* and *Real News*). Older legacy newspapers like *Kathimerini* and *To Vima* are lagging behind. The pattern is repeated in radio news where legacy SKAI radio is trailing Real FM.

In online news, digital-born news portals like newsbomb.gr and news247.gr are often the first port of call, while feisty and controversial blogs like tro-ma-ktiko.blogspot.com attract significant audiences. Although this may suggest significant disruption, many of these portals are also published by traditional journalists who made their reputation during the successful age of private television (like zougla.gr, enikos.gr, or newsit.gr). In.gr, the news portal of the DOL conglomerate that was for many years the biggest in the Greek market, remains quite successful. The websites of some financial newspapers (capital.gr and naftemporiki.gr) attract influential audiences, as a result of the importance of economic news in today's Greece.

The sharp fall in newspaper circulation, the low figures for paying for online news, and the very high figures for ad-blocking software (the second highest in our survey) portray a gloomy picture for publishers in Greece. All these developments go hand in hand with the low trust in journalists and news organisations, which in turn mean that many Greeks feel that news is not something they have to pay money for. As a result Greeks tend to read news in social media at higher rates than other countries.

News participation of Greeks in social media (in terms of sharing or commenting news) is also high, an indication that social networking sites are seen as a tool of expressing opinions and feelings during the ongoing political and economic turmoil.

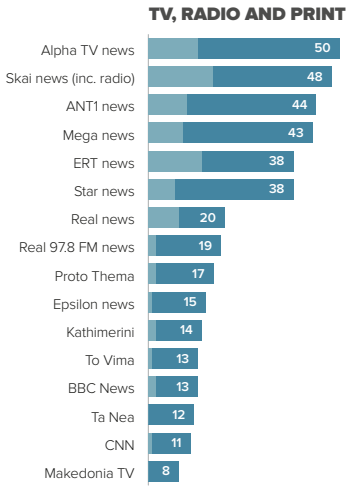
Antonis Kalogeropoulos
Research Fellow, Reuters Institute

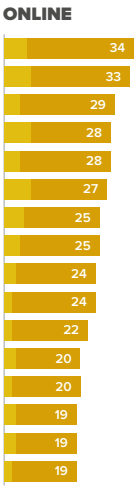
[70] http://www.statistics.gr/el/statistics/-/publication/SDD06/-
[71] http://www.argoscom.gr
[72] http://www.arianna.gr/gr/data

TOP BRANDS

% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

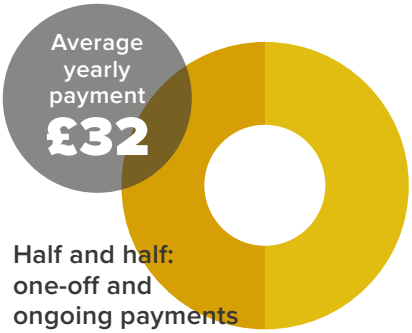




PAYING FOR NEWS

Most online news remains free at the point of consumption and the economic crisis makes it even harder to charge for content than elsewhere. Few newspapers operate paywalls in Greece.

PAY **7%**
pay for online news
(=22nd/26 countries)

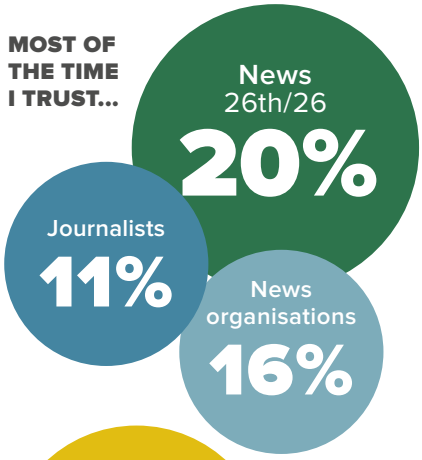


Half and half: one-off and ongoing payments

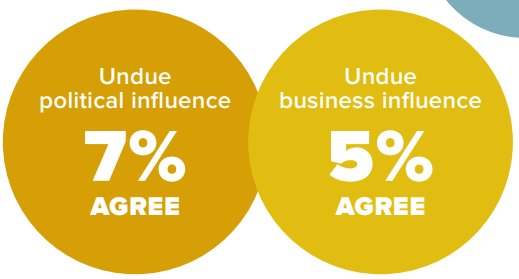
TRUST

Trust in journalism and media organisations in Greece is the lowest of the 26 countries surveyed. Greeks feel that many journalists and news organisations were closely connected to political and business corruption and thus are viewed as partly responsible for the extent of the financial crisis.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **72%**
Tablet **28%**
Smartphone **47%**

AD BLOCKER

36%
use ad blockers.
(2nd/26 countries)
51% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **66%**
Radio **34%**
Print **31%**

Social media **74%**
Online (incl. social media) **96%**

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	68%	69%
2	YouTube	34%	32%
3	Twitter	14%	11%
4	Viber	8%	10%
5	Google+	8%	6%

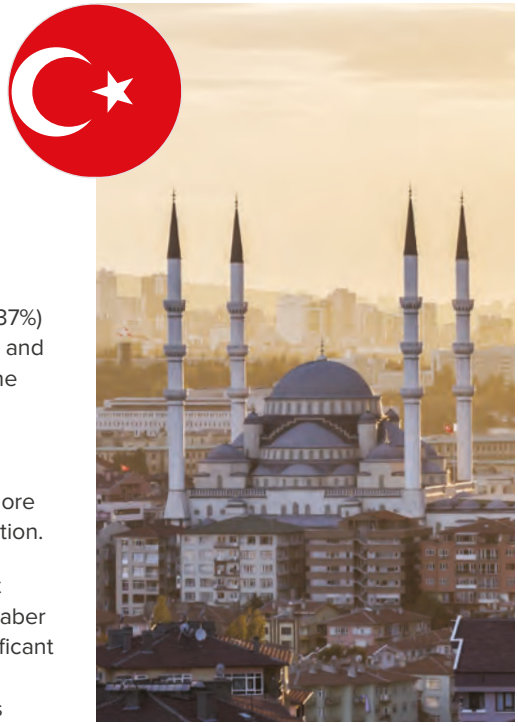
*used weekly for news

TURKEY

While the Turkish government intensifies its suppression of media outlets, social media has increasingly become an alternative platform for news.

STATISTICS

Pop	**78m***
Internet penetration	**60%**



The freedom of press in Turkey has been hotly debated around the world as the ruling party has stepped up pressure on journalists and media owners. Recently, the seizure of two media groups, Zaman and Ipek, has increased concerns about not only the freedom of the press but also Turkish democracy. Despite the restrictions and occasional blocking, social media has emerged as a key communication tool for following national developments.

The decline in circulation of print media has made it harder for them to remain independent of political or commercial interests. Few newspapers make money, except *Hürriyet*, so they tend to be subsidised by owners who need to do deals with the government in areas such as energy and construction, or are heavily dependent on advertising from public companies.[73] At the same time, new dailies have been launched recently such as *Yeni Yüzyıl* and *Karar* that clearly support the government line. Other publications such as *Özgür Düşünce* and *Yarına Bakış* have replaced *Bugün* and *Zaman* after their take-over by the government. There has been no newspaper closure as a result of digital disruption, except *Radikal* which ceased its print publication in 2014.

The high use of online media for news reflects growing access to the internet and smartphones. However, internet operations mostly share and repackage news commissioned for print, television, or from news agencies. There are more digital-born news brands day-by-day but usage remains limited. It may be that their importance will grow as they have more freedom to express opinions. They also provide a platform for sacked journalists and columnists to continue their work despite the low salaries.

Amongst online brands, CNNTürk (37%) is especially popular with the urban and educated population. Hürriyet Online (35%) is probably the most visited site for news overall while its main competitor Milliyet does not refrain from using photos of women and more sensationalist topics to attract attention.

Digital-born web-portals, like Mynet (36%), InternetHaber (22%) EnSonHaber (20%), and Haber7 (17%), are a significant part of the Turkish landscape. They aggregate stories from newspapers and agencies and are important gateways to news.

Medyascope.tv, which broadcasts news through Periscope, deserves a special mention as a growing and important platform for free journalism. Even former ministers of the ruling party use this channel to make statements because they are not allowed to participate in television debates. The International Press Institute gave its '2016 Free Media Pioneer Award' to Medyascope.tv, citing the website's ground-breaking use of new technologies to impart independent news and information in a media landscape under tremendous pressure. Besides this, T24, Diken, Haberdar and Bianet are attracting audiences through the quality of their columnists and exclusive stories.

Ad-blocking is widespread in Turkey (31%) partly due to the amount of free ad-supported news and partly due to the extensive and intrusive nature of advertisements around text and video. Many ads are not designed for mobile use; and their links do not work properly in social media.

Social media is popular for discovering news stories but also for participation as Turkish people love to share what they do. Almost two-thirds of our sample (64%) use Facebook to share and discuss the news due to the high levels of political polarisation in the country. Twitter (30%) and Instagram (12%) are mostly used by better educated people.

Servet Yanatma
Reuters Institute Journalist Fellow and former Foreign Policy reporter with Zaman Daily

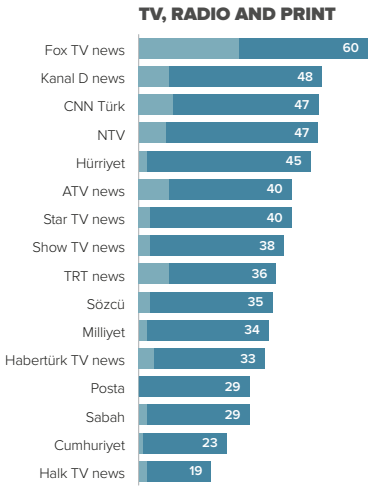
[73] Servet Yanatma, 'Media Capture and Advertising in Turkey', Research Paper, RISJ, 2016.

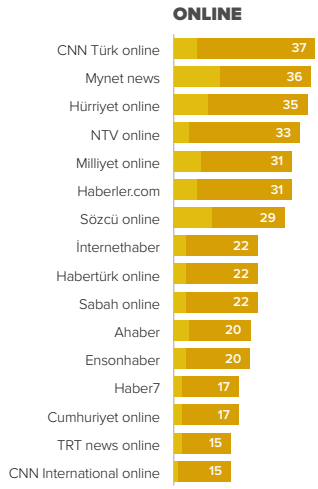
*Data are from urban Turkey, rather than a fully nationally representative sample. This will tend to represent richer and more connected users.

TOP BRANDS

% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

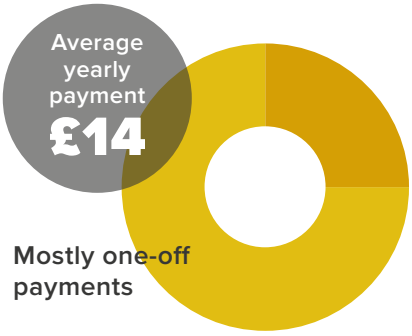




PAYING FOR NEWS

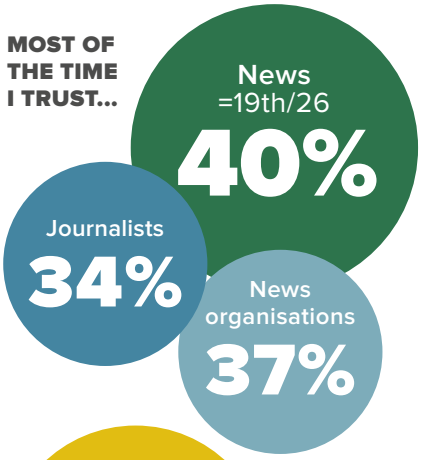
The pay figures from Turkey will be inflated because of our use of an urban sample. In addition, three-quarters of those that paid for news in the last year made a one-off payment for a single edition.

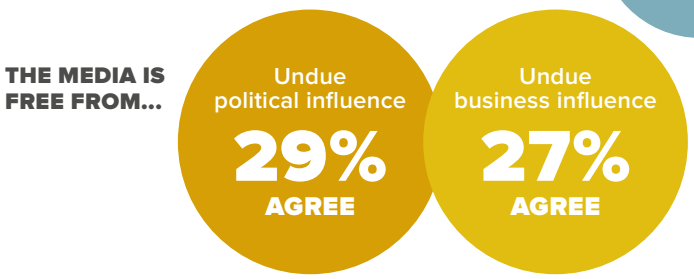
PAY **27%**
pay for online news
(=1st/26 countries)



TRUST

Trust in the news media has decreased from 45% to 40% over the past year. Most media outlets are largely under the control or have come under pressure from the ruling party. There are only a small number of newspapers and television outlets that are able to criticise the government openly.





WEEKLY NEWS REACH PER DEVICE

Computer **62%** (-3)

Tablet **24%** (–)

Smartphone **68%** (+11)

AD BLOCKER

31%
use ad blockers.
(3rd/26 countries)
39% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **80%** (+5)

Radio **41%** (+9)

Print **54%** (-4)

Social media **73%** (+6)

Online (incl. social media) **90%** (+2)

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	64%	61%
2	YouTube	31%	35%
3	Twitter	30%	31%
4	WhatsApp	17%	20%
5	Instagram	12%	15%

*used weekly for news

SOUTH KOREA

The media is characterised by strong broadcasters, a newspaper sector struggling to adapt to digital change, along with powerful Korean-owned online portals, social networks, and messaging apps.

STATISTICS

Pop	**49m**
Internet penetration	**92%**



While TV remains popular in general with Koreans, TV news has suffered a gradual decline from levels of around 95% in 2011. Public broadcaster KBS is the most widely used source offline but has done less well online while SBS, another popular TV news outlet, has invested heavily in its online news brand, along with a data journalism team. Cable news channels such as JTBC, TV Chosun, MBN, and Channel A – owned respectively by newspapers *Joongang Ilbo*, *Chosun Ilbo*, *Maeil Business Newspaper*, and *Dong-a Ilbo* – have increased in popularity, while 24-hour cable news channel YTN has lost market share in recent years.

Web-portal sites such as Naver and Daum are popular digital news platforms, with about 70% of Korean people accessing news this way at least once a week. In addition to news, these portals offer web search, email, blogs, computer games, shopping, and messenger services. Naver is also the creator of the messaging app Line, though it has been a separate corporation since 2014. In the same year, Daum merged with Kakao, which operates chat app Kakao Talk along with the social networking site Kakao Story.

Given the debates in the US and Europe about the growing power of platforms and intermediaries, it is interesting to note that news providers in Korea have been eager to publish their content via portals for years. Publishers are paid for their content but the terms are kept confidential.

Naver and Daum last year together formed a Committee for the Evaluation of News Partnership, complete with a set of ethical standards to help decide which providers should be eligible to supply news to portals.

Korea is the home of Samsung and LG and consequently a market leader in mobile devices, with around 85% smartphone penetration.[74] Mobile news consumption (66%) has increased dramatically since 2011 when a Korea Press Foundation survey showed just 11% accessing this way.[75] Those who access news via smartphones and tablets now exceed those who access news via personal computers.

The number of Koreans reading newspapers has fallen significantly over the last few years to around a quarter of the population (compared with 45% in 2011). With print subscriptions plummeting, many newspaper groups have been focusing their efforts on cost cutting and innovations in digital technology. *Chosun Ilbo*, the largest newspaper online and offline, launched a VR news app while *Financial News* has introduced robot journalism to cover stock market developments. *Maeil Business Newspaper* is also planning to use robot journalism and VR technologies to promote their content. Using advanced natural language processing techniques, the Korea Press Foundation recently launched a news archive titled 'Big Kinds', akin to IBM Watson's News Explorer, in order to support newspapers' automation of news.

Several foreign brands have entered the Korean news market including Huffington Post Korea – in a partnership with the *Hankyoreh Shinmun*. Although Huffington Post Korea's share is still low, it is notable for its adoption of native advertising as its primary business model. BuzzFeed is expected to launch its Korean news service later in 2016.

Most online newspapers remain ad-supported. Indeed, in 2015, the Wall Street Journal withdrew from Korea after it became clear that a paywall strategy would not be successful due to the extent of free news. Digital native publisher, Ohmynews, known for integrating citizen journalism and professional journalism, has struggled financially for years.

The usage of ad-blockers appears to be below average (12%) among the 26 countries in this study. This may be because portal websites tend not to use pop-ups and carry relatively few banner ads.

Sonho Kim
Senior researcher, Korea Press Foundation

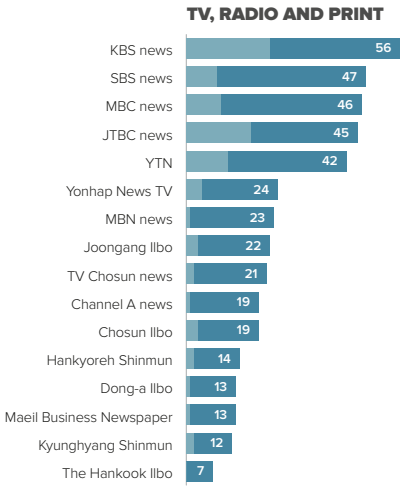
[74] As of Feb. 2016, the number of smartphone service subscribers had reached 44.1 million – Ministry of Science, ICT and Future Planning: http://msip.go.kr/web/msipContents/contents.do?mId=MTQ2

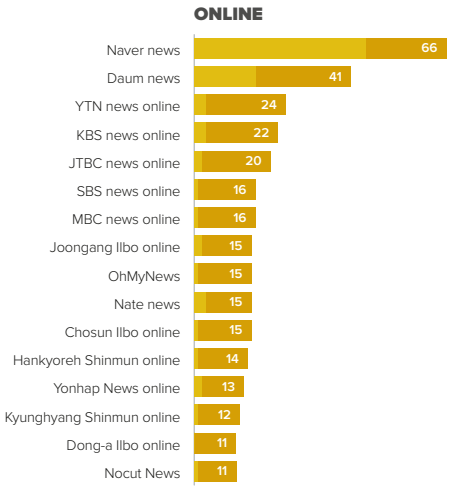
[75] The 2011 news consumption data are from Media Audience Research published annually by the Korea Press Foundation.

TOP BRANDS

% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*





PAYING FOR NEWS

Online news is mainly supported by advertising. Very few newspapers charge directly for news online in Korea.

PAY **6%**

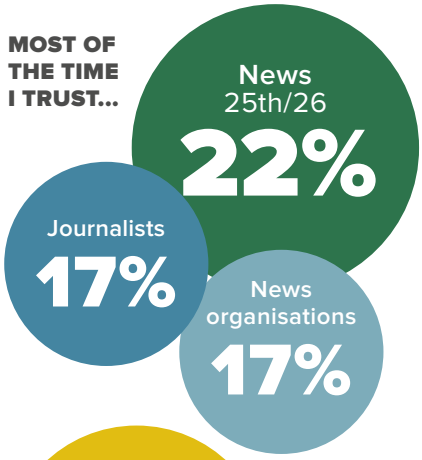
pay for online news
(26th/26 countries)*

*Poll by Korea Press Foundation
April 2016, n=1273

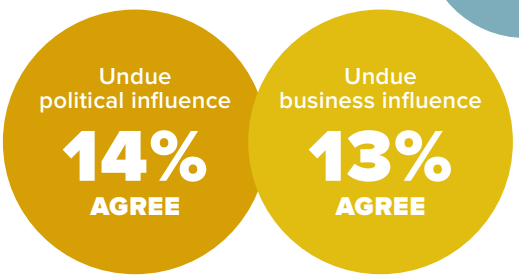
TRUST

Historically, trust in journalists and news organisations has not been high in Korea. In particular, misinformation about the Sewol ferry sinking in 2014 and about the outbreak of Middle East Respiratory Syndrome in 2015 affected trust in the news media.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **60%**

Tablet **12%**

Smartphone **66%**

AD BLOCKER

12%
use ad blockers.
(25th/26 countries)
12% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **71%**

Radio **12%**

Print **28%**

Social media **32%**

Online (incl. social media) **86%**

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	24%	27%
2	Kakao Talk	22%	17%
3	YouTube	16%	12%
4	Kakao Story	9%	5%
5	Twitter	9%	8%

*used weekly for news

JAPAN

The Japanese media market is characterised by a strong high-circulation newspaper sector and by five national television networks, including a licence-funded public broadcaster NHK.

STATISTICS

Pop	**127m**
Internet penetration	**91%**



Japanese newspapers remain some of the most read in the world, reaching around eight in ten households in 2015, thanks to a strong reading tradition and well-developed home delivery networks. Although in total around 44m papers are still sold every day, circulation has been falling steadily – down by 18% since 2000.[76] The left-leaning broadsheet *Asahi Shimbun* has been amongst the most affected. Recent controversies over the retraction of stories on so-called 'comfort women' in the Second World War and the Fukushima nuclear disaster have led to sustained criticism from conservatives. It has seen its circulation decline by around 600,000 copies in the last 15 months alone, and has been forced to cut wages.[77]

Partly because print remains highly profitable, newspaper groups have been slow to develop online audiences and digital businesses. That is now changing and, with *Mainichi Shimbun* introducing a paywall in December 2015, all five national dailies finally have online pay platforms. The conservative *Yomiuri Shimbun* newspaper, which has the largest circulation of around nine million copies a day, took the bold step this year of offering tablets for rent – complete with its own apps from ¥1,780 ($16) a month – exclusively for its newspaper subscribers. The most successful of the five, in terms of digital subscriptions, is *Nikkei* (Nihon Keizai: Japan Economic Daily), known for its £844m purchase of the *Financial Times*, with 450,000 paid digital subscribers. This number has doubled in three and a half years.

The *Asahi Shimbun* newspaper has around 240,000 paid digital subscribers, which is just a fraction of its around seven million print circulation.

Digital-born players are beginning to make an impact, not least with the launch of BuzzFeed Japan in January 2016, a joint venture between BuzzFeed in the United States and Yahoo! Japan. The website's launch team includes Founding Editor Daisuke Furuta from *Asahi* and Satoru Ishido from *Mainichi*; both well known for their work in digital journalism. Previously it would have been unthinkable for journalists to move from the privileged and secure position of a major newspaper to a media start-up. Meanwhile, Yahoo!, which is the top digital news brand in Japan (59%), is broadening its content mix with the creation of original stories in addition to aggregating news from traditional brands.

Competition amongst mobile news brands and apps is becoming intense. Key players are news aggregation apps such as SmartNews, Gunosy, Yahoo!, and Line News. The latter is growing fastest with 22 million active users in December 2015, up from 6 million in April 2014.[78] This growth is partly because Line itself is the go-to messenger app in Japan. This app has also has started to carry rich news timelines, taking advantage of regular access by smartphone users. Gunosy and Antenna, by contrast, seem to be prioritising infotainment and lifestyle content.

Although social media is popular in Japan, it is not used as a news source as frequently as in other countries. Japanese users also tend to be reluctant to participate in news by sharing stories, commenting, or 'liking'. This trend matches the Japanese general public's hesitance to openly discuss political or societal issues in their face-to face communication.

Ad-blockers have also not yet caught on in Japan. It is often the case that imported digital applications take time to be adopted into the unique Japanese linguistic and cultural environment.

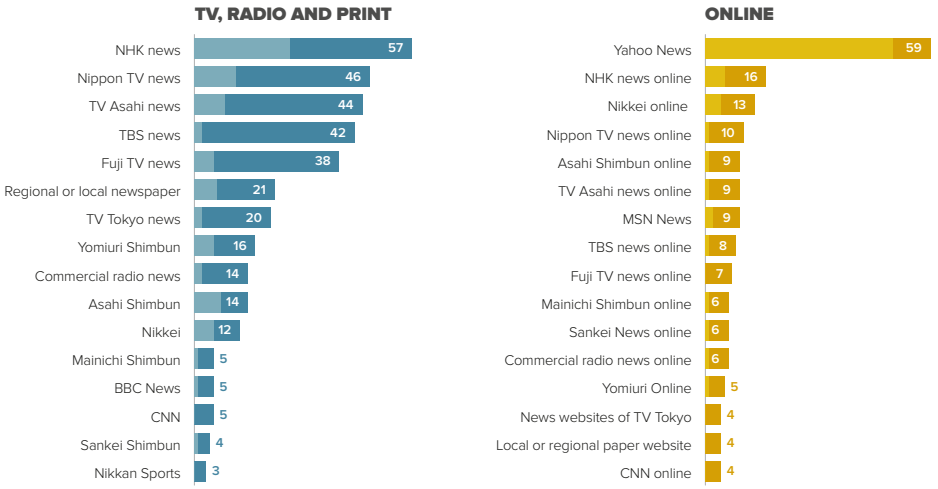
Yasuomi Sawa
Journalist, Kyodo News, Japan and former Reuters Institute Journalist Fellow

[76] http://www.pressnet.or.jp/english/data/circulation/circulation01.php
[77] http://diamond.jp/articles/-/85459
[78] https://linecorp.com/en/pr/news/en/2016/1223

TOP BRANDS

% Weekly usage

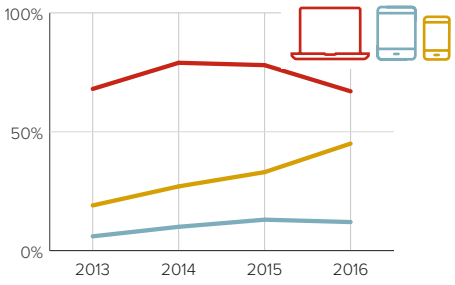
- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*



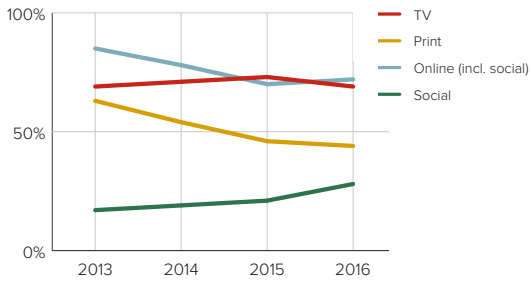
CHANGES IN MEDIA USAGE 2013–2016

Television remains a key source of news in Japan while print newspapers still play an important role in politics and society. Smartphones were slow to take off in Japan due to a strong attachment to legacy feature phones.

WEEKLY REACH PER DEVICE



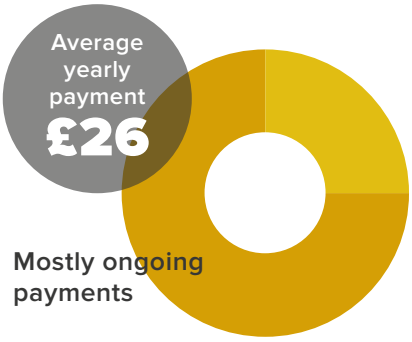
SOURCE OF NEWS 2013–16



PAYING FOR NEWS

Aggregators like Yahoo still offer a range of newspaper content free of charge. Strong print profit margins meant Japanese publishers have been slow to focus on paid content online.

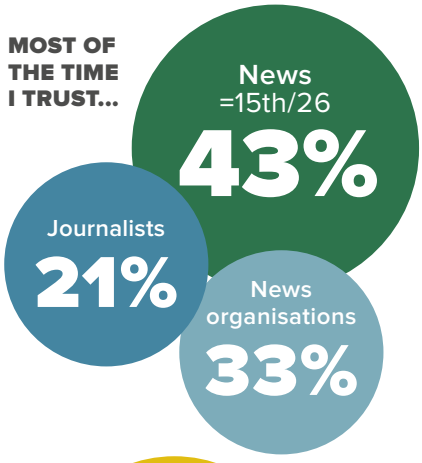
PAY **12%** pay for online news
(=9th/26 countries)



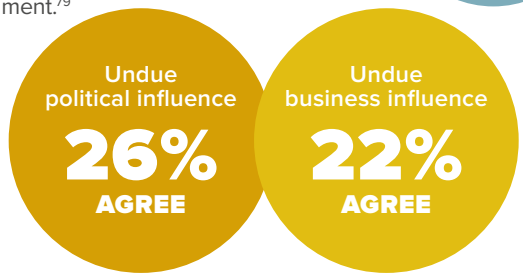
TRUST

Historically, Japanese news brands have been widely trusted, but during the nuclear disaster in 2011 it was suggested that the mainstream media failed to report the real truth behind the accident and instead became a mouthpiece for the government. More recently a number of respected TV news presenters with a reputation for asking tough questions have stepped down or not had contracts renewed after allegations of political pressure from the conservative government.[79]

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



AD BLOCKERS



10%
use ad blockers.
(26th/26 countries)
12% under 35.

TOP SOCIAL NETWORKS*

RANK		NETWORK	ALL	U35s
1	YouTube	YouTube	26%	16%
2	Facebook	Facebook	16%	15%
3	Twitter	Twitter	16%	27%
4	Line	Line	13%	15%
5	Google+	Google+	6%	4%

*used weekly for news

[79] http://www.theguardian.com/world/2016/feb/17/japanese-tv-anchors-lose-their-jobs-amid-claims-of-political-pressure

AUSTRALIA

The Australian media environment has endured a period of uncertainty due to ongoing government leadership instability and a looming federal election in 2016.

STATISTICS

Pop	**23m**
Internet penetration	**93%**



Australia has a high concentration of traditional media ownership dominated by News Corporation and Fairfax Media who together own the majority of national and capital city newspapers. The broadcast landscape features three commercial free-to-air TV networks and two public broadcasters as well as a variety of commercial radio networks and audio streaming services. Under proposed new laws, current ownership restrictions would be lifted allowing mergers and acquisitions and potentially further shrinking the ownership pool.

Smartphone and internet penetration remain high: more than 90% of consumers access the internet at least once a day and 61% use a smartphone or tablet to access online news. With more than 11 million Facebook and 9 million YouTube users, over half of Australians (52%) reported using online and social media as a source of news.

While TV remains the dominant source of news in Australian households, the number of consumers watching free-to-air commercial TV has fallen 15% since 2008,[80] due partly to the growth of subscription on-demand services (SVOD) such as Quickflix, Presto, Stan, and the dominant Netflix, which reached more than 2.7 million homes and attracted more than one million subscribers over the past 12 months.[81] The shift to cheaper SVOD combined with the rising costs of buying programmes challenges free-to-air services and the dominant pay-TV provider Foxtel.

The radio landscape has been altered by a merger between Macquarie Radio Network and Fairfax Media Limited's interests. Australians are changing their listening habits, turning to streamed audio providers such as Apple Music – launched in June 2015 – and audio apps such as Spotify and Pandora. Blockbuster podcasts have made an impact but we are yet to see if this will affect everyday news consumption habits. While digital radio take-up in capital cities is strong at 25%, the high cost of rolling out terrestrial digital services to regional and remote areas remains a hurdle. In the short to medium term Australians are likely to continue to consume a mix of analogue, digital, and online streaming audio options.

Newspaper print circulation has continued to fall. Between December 2014 and December 2015 the *Sydney Morning Herald (SMH)* daily dropped 9% and the *Canberra Times* a substantial 18.7%. However digital subscriptions for *The Herald Sun* and *The Australian* have continued to rise steadily, with a small downturn for the *SMH* and *The Age* after rapid earlier increases.[82]

Advertising revenue continues to drop for traditional media as investment shifts to online. Newspapers have dropped from 27% to 14% of total ad spend since 2009, whereas online has risen from 17% to 35%. By 2019 internet advertising is expected to reach 50% of total ad spend.[83]

News Corp Australia and Fairfax newspapers combined have announced more than 200 editorial staff cuts over the past 12 months. Fairfax is planning to close both the *Cooma-Monaro Express* and the *Summit Sun* and reformat the *Queanbeyan Age* to a weekly, whilst upgrading the online presence of other regional papers. From July 2016 the *Canberra Times* will become a compact. These changes come on top of Fairfax's merger of its federal political coverage across its capital city newspapers. Meanwhile BuzzFeed has arrived in the Canberra press gallery with its first dedicated political reporter.

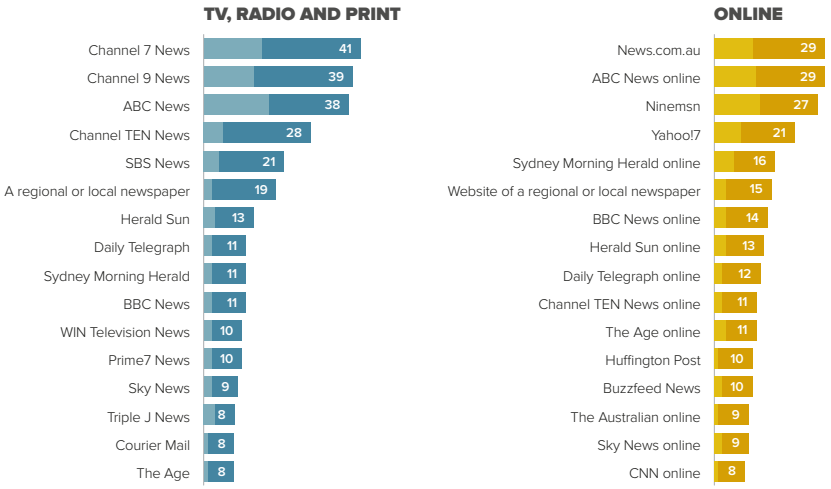
Caroline Fisher and Jerry Watkins
News & Media Research Centre, University of Canberra

[80] Roy Morgan Research. Jan 2016. Article No. 6646.
[81] Roy Morgan Research. Feb 2016. Article No. 6633.
[82] Audit Bureau of Circulation data, Dec. 2015.
[83] PriceWaterhouseCoopers. *Entertainment and Media Outlook 2015-2019.*

TOP BRANDS

% Weekly usage

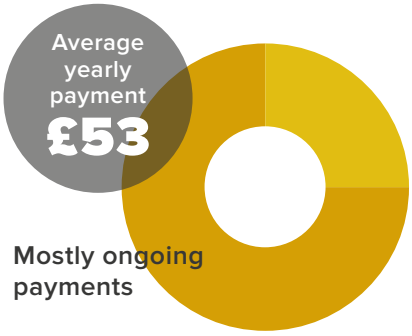
- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*



PAYING FOR NEWS

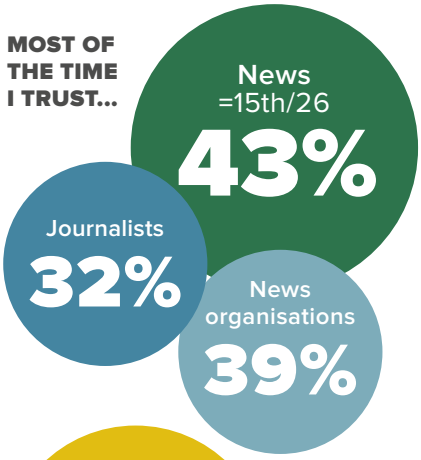
Many Australian publishers operate paywalls but after initial success have struggled to increase the number of digital subscribers beyond loyal users.

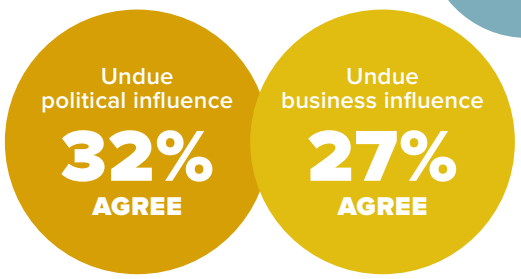
PAY **10%**
pay for online news
(=13th/26 countries)



TRUST

Australians' trust in news generally remains quite low compared to other countries, at 43%. While the data indicate that trust in news media has risen over the past 12 months – a shift also seen in the 2016 Edelman Global Trust Survey – trust in social media news sources continues to be lower than in traditional media sources, with TV news remaining the most trusted.





WEEKLY NEWS REACH PER DEVICE

Computer **60%**

Tablet **27%**

Smartphone **51%**

AD BLOCKER

23%
use ad blockers.
(=15th/26 countries)
33% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **65%**

Radio **40%**

Print **38%**

Social media **52%**

Online (incl. social media) **78%**

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	45%	53%
2	YouTube	15%	20%
3	Twitter	8%	12%
4	WhatsApp	4%	7%
5	LinkedIn	3%	1%

*used weekly for news

CANADA

In this highly concentrated and bilingual media environment,[84] traditional media brands, especially television, remain dominant; major newspapers are experimenting with free tablet apps or paywalls; and the public broadcaster remains a strong presence across platforms.

STATISTICS

Pop	**35.5m**
Internet penetration	**93%**



Canadian media companies are faced with changing consumption habits and declining advertising revenues, especially in print media and more modestly in television. Advertising dollars have largely transferred online since 2009, in large part towards social media, search engines, and other web-only media.[85]

There was positive news for Canada's public service broadcasters, CBC/Société Radio-Canada (SRC), when the newly elected Liberal government increased funding by $675m over five years in September 2015 – reversing cuts implemented by the Conservatives. By contrast, commercial television stations in Canada have seen their revenues decline by 14% between 2012 and 2014. The broadcast regulator, CRTC, has expressed concern over the consequent reduction of resources devoted to local news production (-4% full-time employees). These losses occurred at the same time as the abolition of the Local Programming Improvement Fund in 2014.

In digital, there has been much focus on the pioneering strategy of La Presse, the French-language publisher with the largest readership (including digital platforms). In January it stopped printing a newspaper on weekdays, leaving just its Saturday print edition. Meanwhile the award-winning La Presse+ app, launched in 2013, reports steady increases in readership, with more than 250,000 weekly tablet users.

Canada's most widely read newspaper, *The Toronto Star*, adopted the design and technology behind LaPresse+ in September to create its own tablet application. However, despite a sizeable investment ($14m in 2015 and $10m planned for 2016), the Star Touch app (*Toronto Star*) reached only 26,000 daily users as of March 2016. Both apps offer their full content free of charge, as do the six regional Québec newspapers acquired in 2015 by Groupe Capitales Médias from Gesca, La Presse's parent company.

Some newspapers, like the *Globe* and *Mail* and the Postmedia group, have introduced paywalls or other forms of payment for content. Although their hope is to convince readers to pay for distinctive content, this may prove challenging when there is so much news available for free.

After betting on a four-platform strategy (internet, tablet, smartphone, print) in early 2013, the Postmedia[86] chain acquired the English-language Sun chain from Québecor and proceeded to merge newsroom operations in cities where it owned more than one newspaper, laying off 90 employees.

In Halifax, the *Chronicle-Herald* staff were locked out in early 2016. Two newspapers closed: the *Nanaimo Daily News* (Black Press) and the *Guelph Mercury* (Torstar). The *Mercury*'s closure is particularly symbolic, as it was founded in 1867, the same year as the Canadian Confederation.

In terms of digital-born media, the most successful are imports from across the US border. Yahoo! News is the strongest web-only news brand in English Canada while the Huffington Post's Canadian and Québec editions are well-established. BuzzFeed Canada was launched in June 2015. There are some alternative web-only news sources in Canada, but their reach and production resources are relatively small.

Until recently, French-language media had been somewhat protected due to language-specific media consumption, a less pronounced economic downturn, and a slower digital shift. However, French-speaking Quebecers are now spending more time consuming news online, including mobile technologies, than on television, and the main news providers have laid off staff in the past year.

Québecor's newspaper holdings (*Journal de Montréal/Journal de Québec*) abandoned their paywalls in late 2015, making all their content available for free. Both newspapers also joined Facebook's Instant Articles system, as did magazines *Maclean's* and *Chatelaine*, and the TV network Sportsnet.

Colette Brin
Centre d'études sur les médias, Université Laval

[84] As of the 2011 census, English was the first language spoken in the home by 66% of the population and French by 21% (13% spoke another language). Over 90% of French-speaking Canadians reside in Québec.

[85] http://www.cem.ulaval.ca/pdf/Donneesfinancieres.pdf

[86] Postmedia is owned by a group of investors including Manhattan-based hedge fund, Golden Tree Asset Management, which owns 35% of the company.

TOP BRANDS

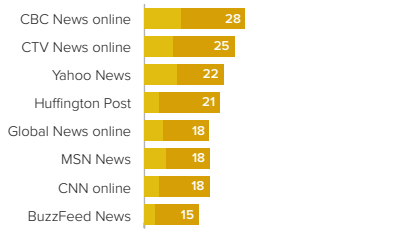
% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

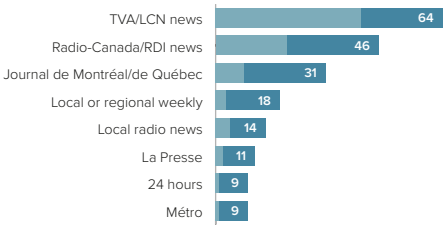
TV, RADIO AND PRINT (ENGLISH SPEAKING)



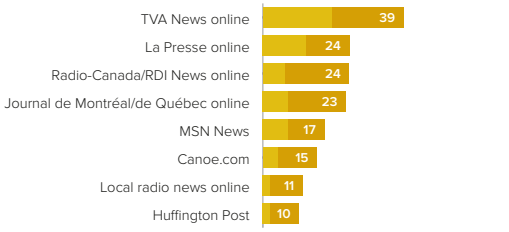
ONLINE (ENGLISH SPEAKING)



TV, RADIO AND PRINT (FRENCH SPEAKING)



ONLINE (FRENCH SPEAKING)



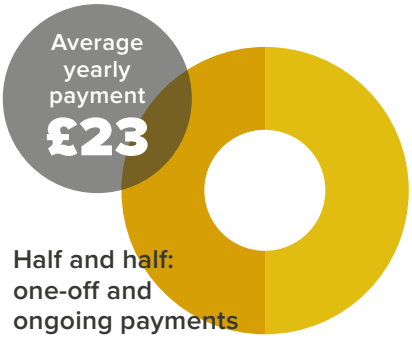
PAYING FOR NEWS

Publishers are struggling to persuade Canadians to pay for content with so much available for free – especially via the public broadcasters and free apps offered by daily newspapers.

PAY **9%**

pay for online news

(=16th/26 countries)

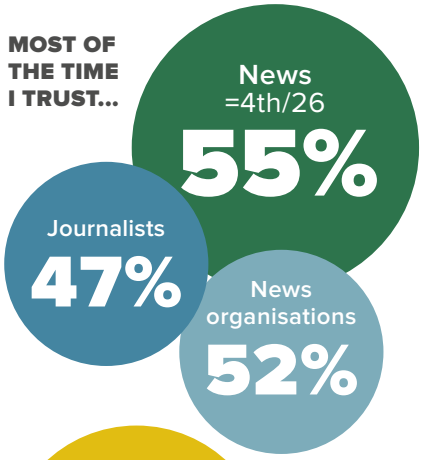


Half and half: one-off and ongoing payments

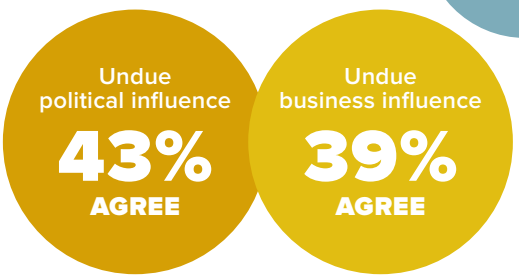
TRUST

Canadians have consistently shown relatively high levels of trust in news sources, particularly when compared to the US. Support for public broadcasting also remains relatively strong despite low ratings (especially in English Canada) and various critiques from different groups (i.e. commercialisation, suspicion of political bias, insufficient regional or minority coverage).

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



WEEKLY NEWS REACH PER DEVICE

Computer **64%**

Tablet **24%**

Smartphone **39%**

AD BLOCKER

22%

use ad blockers.

(18th/26 countries)

34% under 35.

WEEKLY NEWS REACH PER SOURCE

TV **71%**

Radio **27%**

Print **36%**

Social media **48%**

Online (incl. social media) **75%**

TOP SOCIAL NETWORKS*

RANK	NETWORK	ALL	U35s
1	Facebook	46%	58%
2	YouTube	17%	24%
3	Twitter	12%	19%
4	Google+	4%	3%
5	Instagram	3%	8%

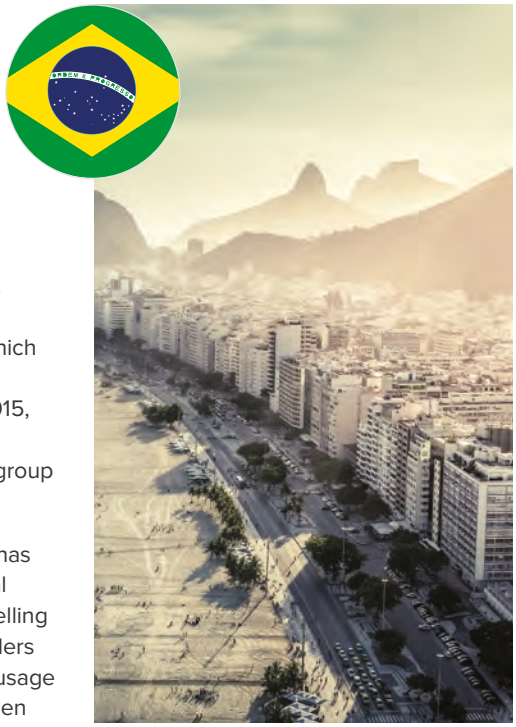
*used weekly for news

BRAZIL

South America's biggest media market has long been dominated by popular free-to-air TV stations which attract more than 50% of advertising spend. But this supremacy is being challenged in urban areas of the country, where online media has consolidated its position as the main source of news.

STATISTICS

Pop	**204m***
Internet penetration	**58%**



Monthly audiences for some of the top news brands online – such as G1 and UOL – were over 30 million unique visitors in 2015. However, in terms of popularity news sites in Brazil are no match for Facebook. Since 2011, when the company opened an office in the country, the number of Brazilians using Facebook has increased nearly six-fold to more than 83 million.[87] Second only to Facebook among the top social media brands used for news, is WhatsApp, which is estimated to have 100m users, meaning that one in every two Brazilians has the app.

The fascination exerted by social media is often explained in terms of Brazil's hyper-social culture, where people are considered to be more open to making friends. But Facebook and other networks are being used for more than just keeping in touch. In urban Brazil, social media are used as a source of news by approximately 72% of respondents in our survey. In December 2015, a dozen Brazilian news brands – some of them owned by mainstream media heavyweights – started to publish directly to Facebook using the Instant Articles format.

The search for new sources of revenue is critical for the print media, which was hit hard by last year's contraction of the Brazilian economy, the worst downturn in 25 years. More than 1,400 media professionals lost their jobs in 2015. Examples of the current downsizing include the magazine giant Abril, which ceased publishing three titles and sold seven other news brands in 2015, and the financial newspaper *Brasil Econômico*, owned by Portuguese group Ongoing, which closed last year.

Despite the key role that the press has played in uncovering recent political scandals, nine out of the ten best-selling newspapers in the country lost readers in 2015.[88] By contrast, online news usage rose 50% in the first half of 2015 when compared to the same period of the previous year.[89] The increase in digital circulation has happened despite the adoption of paywalls by a number of Brazilian papers. By the end of 2014, ten major dailies had implemented paywalls, according to the National Association of Newspapers (ANJ).

Around one in five (22%) urban Brazilians say they paid for some kind of online news content during the past year. That's the third highest rate among the 26 countries analysed, with demand highest for premium content such as financial news and on-demand video. Publishers have also been experimenting with branded and sponsored content in print versions of the major Brazilian newspapers but also on online portals. *Folha de S. Paulo*, the daily with the highest circulation in the country, launched a business unit specialising in producing this kind of content in different formats, including digital and video, following in the footsteps of other major media groups.

In Brazil, ad-blockers are not yet a major source of concern for online advertisers, as penetration remains relatively low at 21%.

Rodrigo Carro
Reuters Institute Journalist Fellow and financial journalist

[87] May 2014, according to the then chief executive of Facebook in Brazil, Leonardo Tristão.

[88] Instituto Verificador de Comunicação (IVC).

[89] National Association of Newspapers (Associação Nacional de Jornais).

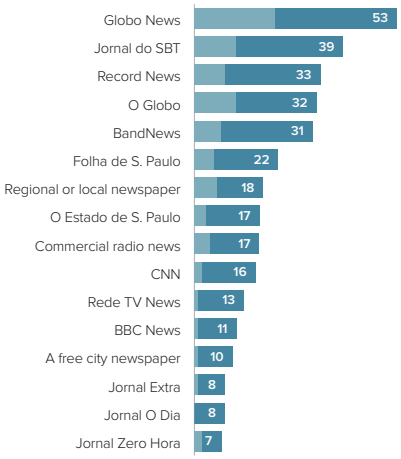
*Data are from urban Brazil, rather than a fully nationally representative sample. This will tend to represent richer and more connected users.

TOP BRANDS

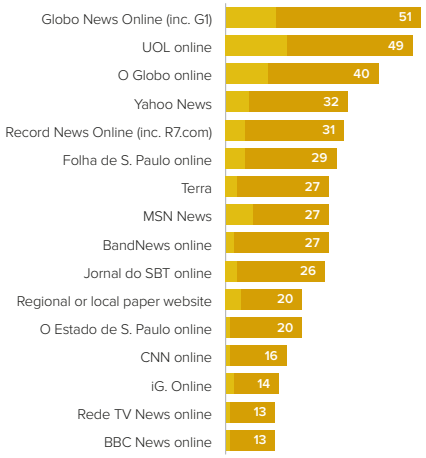
% Weekly usage

- Weekly use *TV, radio & print*
- Main source *TV, radio & print*
- Weekly use *online brands*
- Main source *online brands*

TV, RADIO AND PRINT



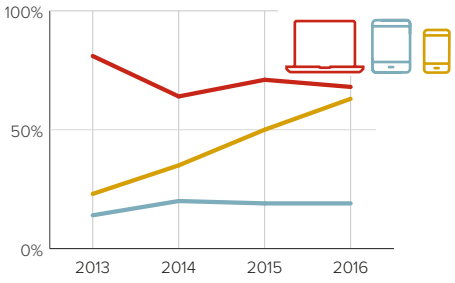
ONLINE



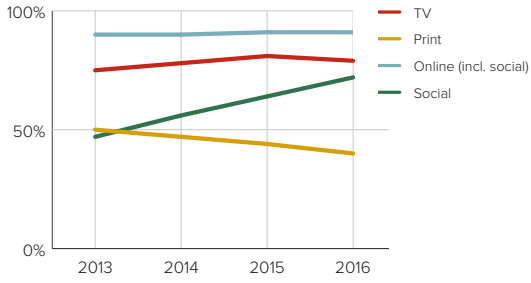
CHANGES IN MEDIA USAGE 2013–2016

TV news remains the most important source of news overall in Brazil, though online is ahead with our urban sample. Social media has grown rapidly with over 70% using it as a source of news each week.

WEEKLY REACH PER DEVICE



SOURCE OF NEWS 2013–16



PAYING FOR NEWS

Although almost a quarter of our urban sample says they pay for online news, a significant proportion is for one-off purchases. The average yearly payment is one of the lowest in our survey.



22% pay for online news
(3rd/26 countries)

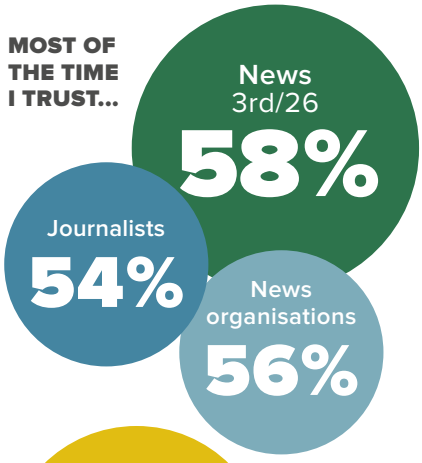


Half and half: one-off and ongoing payments

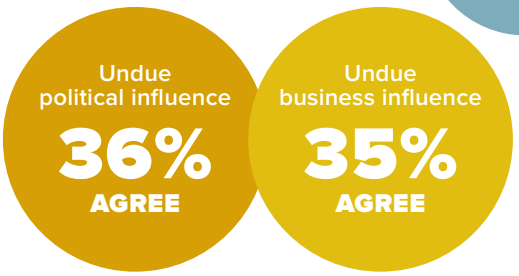
TRUST

In a year in which corruption scandals and weak economic figures filled the headlines, trust in news remained high. Polarisation between supporters and opponents of the current government helps to explain why a little more than one-third of the urban population considers journalists to be free from undue political influence.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



AD BLOCKERS



21%
use ad blockers.
(=19th/26 countries)
27% under 35.

TOP SOCIAL NETWORKS*

RANK		NETWORK	ALL	U35s
1		Facebook	69%	70%
2		WhatsApp	39%	37%
3		YouTube	37%	38%
4		Twitter	13%	15%
5		Instagram	11%	14%

*used weekly for news

FURTHER ANALYSIS AND INTERNATIONAL COMPARISON

In this section we lay out the overall shape of news consumption across TV, radio, and online. We look at different segmentations to help us understand the varying patterns of news use, as well as the role of traditional and new digital brands. We also explore trust in different types of media, look at consumption patterns around soft and hard news, explore participation and social sharing and finally attitudes to paying for news across countries.

3.1 SOURCES OF NEWS

TELEVISION AND ONLINE ARE KEY SOURCES IN MOST MARKETS

Television and online remain the most popular ways of accessing news on a weekly basis. Amongst our sample, television is ahead in Germany (78%) and France (74%), with online winning in many other countries. Radio is popular in the Netherlands (57%), Ireland (48%), and Germany (46%), while print is still accessed to a high degree in Austria (67%) and Switzerland (63%).

Given that this is an online survey and thus will under-represent traditional users who are not online, TV news is probably still ahead in a number of countries and print remains stronger than these figures suggest, but every year our survey shows the balance shifting slowly but inexorably towards online.

Traditional offline platforms remain critically important even for online users. On average, three-quarters of online users (74%) access TV news every week and over a third read a printed newspaper (36%). This remains a multiplatform world where audiences pick and mix from a range of platforms at their own convenience and at different times of day.

DEMOGRAPHIC DIFFERENCES

As in previous years, we also find strong generational differences in the sources and platforms being used for news. Traditional platforms like TV, radio, and print remain preferred sources for older generations while younger groups prefer online and social media.

In terms of gender, some traditional news platforms like print and radio appeal more to men, while only social media appeal more to women (see chart overleaf).

PLATFORMS FOR ACCESSING NEWS BY COUNTRY

	USA	UK	GER	FRA	SPA	POR	ITA	IRE	FIN	NOR	SWE	DEN	BEL
TV	66%	70%	78%	74%	79%	82%	83%	73%	75%	72%	72%	73%	75%
Radio	23%	33%	46%	28%	34%	37%	30%	48%	47%	47%	47%	47%	46%
Print	26%	35%	38%	27%	56%	47%	43%	47%	53%	41%	43%	29%	45%
Online*	73%	72%	59%	71%	86%	88%	83%	84%	89%	86%	89%	84%	82%

	NLD	SUI	AUT	HUN	CZE	POL	GRE	TUR	KOR	JPN	AUS	CAN	BRA
TV	76%	69%	76%	72%	81%	80%	66%	80%	71%	69%	65%	71%	79%
Radio	57%	43%	46%	25%	35%	42%	34%	41%	12%	17%	40%	27%	35%
Print	43%	63%	67%	27%	34%	32%	31%	54%	28%	44%	38%	36%	40%
Online*	81%	82%	73%	88%	91%	82%	96%	90%	86%	72%	78%	75%	91%

*(incl Social media)

Q3. Which, if any, of the following have you used in the last week as a source of news? *Base:* Total sample in each country

SOURCES OF NEWS BY GENDER AND AGE – ALL COUNTRIES

	MALE	FEMALE	18-24	25-34	35-44	45-54	55+
TV	75%	73%	58%	63%	71%	78%	85%
Radio	41%	33%	24%	30%	35%	40%	44%
Print	44%	38%	31%	33%	37%	41%	50%
Online*	83%	82%	88%	87%	84%	80%	77%
Social media	48%	55%	68%	59%	53%	46%	43%

*(incl Social media)

Q3. Which, if any, of the following have you used in the last week as a source of news? *Base:* Male/Female/18-24s/25-34s/35-44s/45-54s/55+: All countries = 26098/27232/5790/9456/9941/9561/18582

3.2 SEGMENTATIONS ACROSS AND WITHIN COUNTRIES

As in previous years we have created a number of segmentations to help us interpret the results. These give us a non-overlapping categorisation of the online news universe that we can apply across all of our countries.

TRADITIONALISTS VS MAINLY DIGITAL

Our first segmentation categorises respondents into those that exhibit traditional approaches (mainly TV, radio and print) and those that are mainly digital in the way they consume the news. We also identify a sizeable group that are half and half (platform agnostic). The following table explains how these segments have been achieved.

Looking at the results of these segmentations by country we find that France (44%) and Germany (50%) still have the largest percentage of our online sample accessing news in mainly traditional ways. In Germany, for example, there is a strong tradition of sitting down and watching the evening TV bulletins like *Tagesschau* while online news is less heavily used than elsewhere. By contrast, Korea, Norway, Sweden, and Greece have a more strongly digital profile.

SEGMENTATION BY SOURCES AND DEVICES

TRADITIONAL 33%

- Television news bulletins or programmes
- 24 hour news television channels
- Radio news programmes or bulletins
- Printed newspapers
- Printed magazines

HALF & HALF 44%

- Half & Half – Traditional users who use two or more digital devices for news

OR...

- Mainly Digital users who have used one or fewer devices in the last week

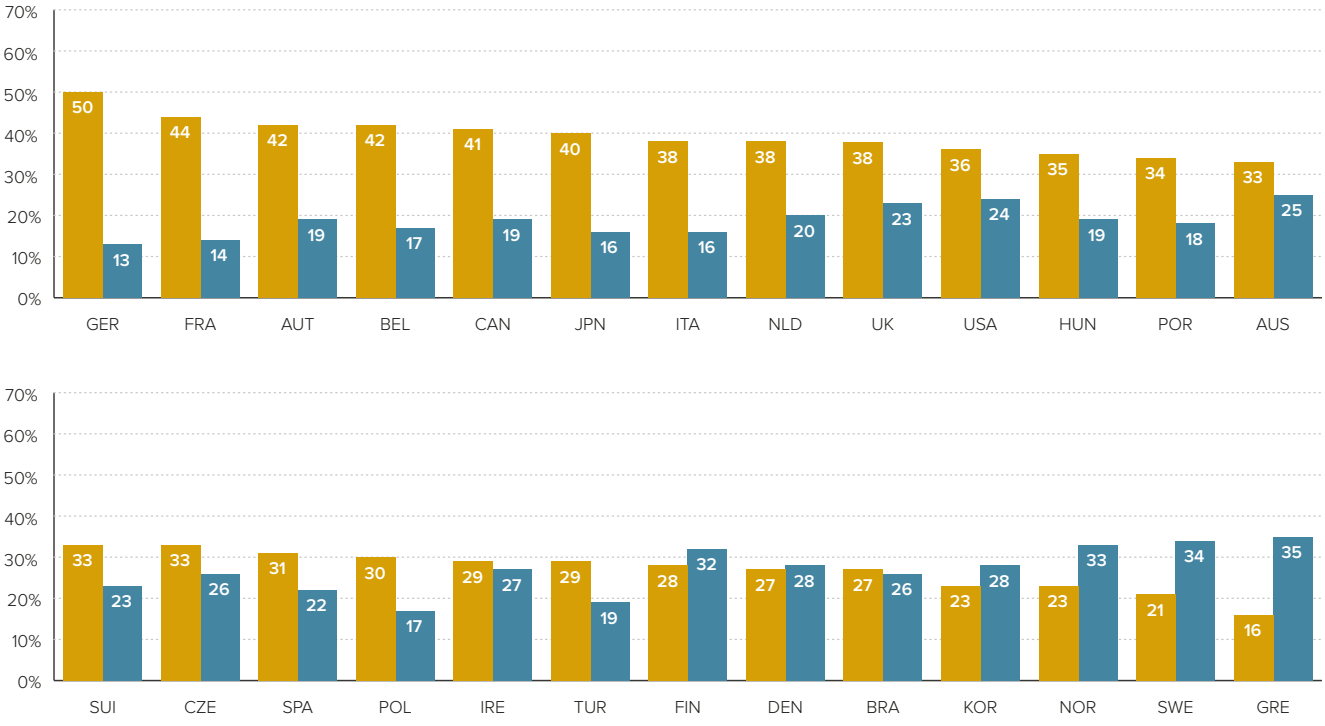
MAINLY DIGITAL 23%

- Websites/apps of newspapers
- Websites/apps of news magazines
- Websites/apps of TV and Radio companies
- Websites/apps of other news outlets
- Social media
- Blogs

Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news? **Q8B.** Which, if any, of the following devices have you used to access news in the last week? *Base:* Total sample

We need to be careful in interpreting these results. The Brazil and Turkey samples are predominantly based in cities and will tend to be younger and not be fully representative of the national picture. Italy and Spain also have lower internet penetration so this data will significantly under-represent traditional media use. But it is still striking how different the patterns are – even in countries with very similar levels of internet penetration. A number of large countries are taking longer to adopt digital news use and we also find that within those countries there are particular groups that prefer traditional platforms, even when they use digital technologies for many other purposes (banking, e-commerce, etc.).

TRADITIONAL USERS VS MAINLY DIGITAL USERS – ALL COUNTRIES



Segmentation: Sources and Devices. Total sample in each country

WHO ARE THE TRADITIONALISTS?

Tend to be older, with lower level of education but they tend to trust the news more than mainly digital users.

67% are aged 45+

54% are female

69% did not go to university

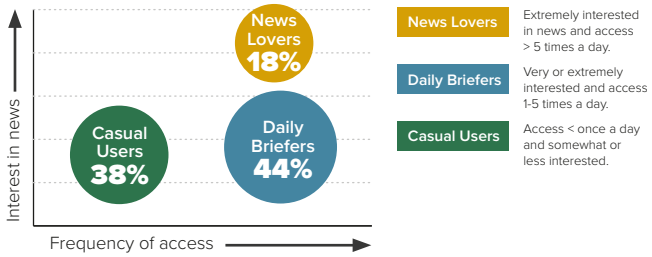
49% trust the news most of the time

NEWS LOVERS, DAILY BRIEFERS, AND CASUAL USERS

Our second segmentation is based on a mix of frequency and interest in the news. For example, news lovers are those that say they are extremely interested in the news and access it more than five times per day. The full conceptual framework is explained right.

Some of these groups play more important roles than others in driving the new interactive news ecosystem. News lovers consume more, are more trusting of news organisations and journalists, share more, are better educated, and are almost twice as likely to pay for online news.

SEGMENTATION BY FREQUENCY OF ACCESS AND INTEREST IN NEWS



Q1b. Typically, how often do you access news? **Q1c.** How interested, if at all, would you say you are in news? *Base:* Total sample

WHO ARE THE NEWS LOVERS?

Tend to be male, older, with higher levels of education. They tend to trust the news more, share more and are more prepared to pay.

59% are male

48% have bachelor/ masters/doctoral degree

52% trust the news most of the time

77% more likely to pay for online news (than daily briefers)

37% more likely to share news (than daily briefers)

3.3 COMPARATIVE BRAND DATA ANALYSIS

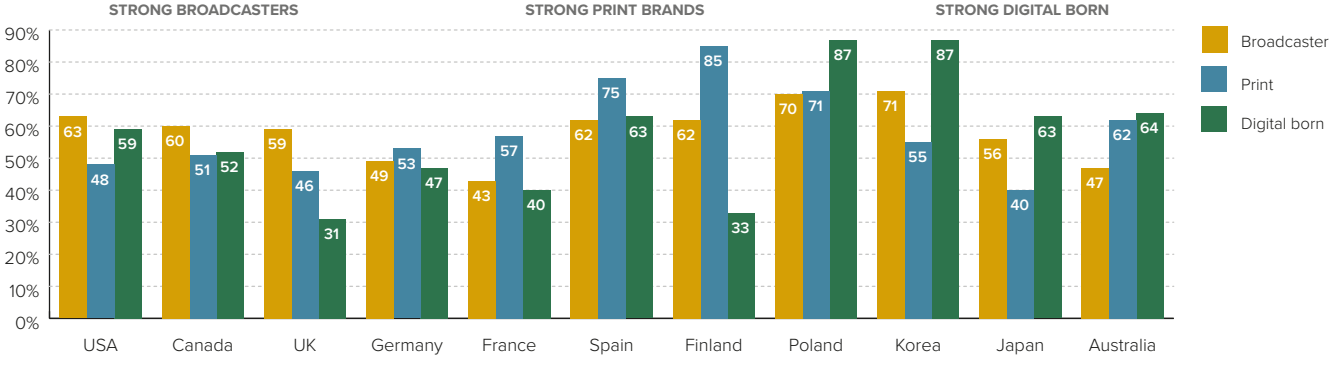
In this section we draw on country data on brand performance along with questions asked elsewhere in the survey about the types of news sources accessed online and offline. This includes a typology of different online sources whether they are traditional newspaper providers such as the *New York Times*, broadcaster websites like NHK, Globo, and the BBC, or digital-born players like Yahoo, Huffington Post, or BuzzFeed.

In the chart below we have used these classifications to show the relative balance between these groups in a few selected countries, in terms of weekly consumption.

In the US, Canada, and particularly the UK, broadcast brands take the largest share, with newspapers playing a lesser role. In Finland and Spain and to a lesser extent Germany and France, it is newspaper brands that have made the running in digital news. By contrast, in Poland, Korea, Japan, and Australia there has been more impact from digital-born brands (see chart below).

Looking in more detail at some of these countries, we can understand more about what is driving these differences. The US has a number of strong national broadcast brands like Fox and CNN, while newspapers tended to have a local

ONLINE REACH OF NEWSPAPERS, BROADCASTERS AND DIGITAL BORN BRANDS (SELECTED COUNTRIES)



Q5B. Which, if any, of the following have you used to access news in the last week? *Base:* Total sample in each country

footprint which has made it harder to develop online readership across the country. At the same time, the entrepreneurial culture in the US has spawned a huge number of digital-born start-ups, from Yahoo and AOL to newer brands that together reach almost two-thirds (59%) of our sample. The UK has a national broadcaster (the BBC), which invested early in digital, and a highly competitive newspaper sector, which has also gained strength from accessing other English-speaking markets. By contrast, in France, we see a more fragmented picture with traditional newspaper brands like *Le Monde* and *Le Figaro* key online destinations but also with a strong digital-born sector which includes US imports like Yahoo and the Huffington Post as well as profitable journalistic start-ups like Mediapart. In Finland, the strong reading tradition along with a history of newspaper subscription has helped established print brands to reach over four-fifths of our sample online (85%), a significant proportion of whom pay for online news. The public broadcaster YLE also cuts through online, though mainly with older groups, but there has been little progress for digital-born media. Finally in Poland, we see heavy use of local portals like Onet and WP, which mainly aggregate news in addition to broadcast and newspaper groups.

TOP NEWS BRANDS ONLINE (SELECTED COUNTRIES)

USA		UK		FRA		FIN		POL	
Yahoo News	28%	BBC News	51%	20 Minutes	19%	Ilta-Sanomat	60%	Onet News	60%
Huffington Post	25%	MailOnline	17%	Le Monde	18%	Iltalehti	58%	WP News	52%
Fox News	22%	Guardian	14%	Le Figaro	15%	Yle News	44%	TVN24	51%

Q5B. Which, if any, of the following have you used to access news in the last week? *Base:* Total sample in each country

DIGITAL-BORN SECTOR IS INCREASINGLY COMPLEX AND FRAGMENTED

The digital-born sector is increasingly difficult to categorise. In the past we have made a distinction between 'first-wave' digital brands that primarily aggregate news from multiple sources and newer 'second-wave' companies that produce their own content such as the Huffington Post and BuzzFeed. But these distinctions are by no means clear and differ by country and region.

Amongst 'first-wave' aggregators we can see brands like Yahoo, MSN, and AOL, which became popular by bundling email or search services via desktop, increasingly struggling to make money and remain relevant. Many have been hit hard by the downturn in display advertising and the move to mobile. By contrast some non-English-speaking national aggregators seem to be going from strength to strength, with many diversifying into original news content, video, and entertainment.

NAVER Naver is South Korea's biggest web portal and search engine that started life as an offshoot of Samsung's IT department. In our survey it is used as a source of news by 66% of our Korean respondents. Its newsstand aggregates content from all the major Korean publishers but most of its money is made elsewhere. Unlike some Western portals, advertising revenues remain strong.

YAHOO! JAPAN Formed as a joint venture between Yahoo US and internet company SoftBank, Yahoo Japan is the most popular web portal and search engine in Japan. Well over half of our sample (59%) use its news service weekly as it provides easy access to a range of Japanese publishers. Facing new threats from mobile aggregators like SmartNews, it is stepping up original news production and investing more in video and entertainment.

SAPO Sapo is a Portuguese portal that also started life as a search engine but has expanded into email and web hosting following an acquisition by Portugal Telecom. It produces its own news content but also acts as a platform for the wider news industry. It has deals with most top media organisations that allow them to republish news through the Sapo website. In our survey 36% of our online sample use the main portal with many more accessing branded areas of the site.

mynet Mynet is Turkey's most popular web portal offering news, sport, finance, games, entertainment, and social media. It built its business by offering free email to Turkey's large population, which has helped it attract a large audience who come back every day. In our survey 36% use Mynet as a gateway or destination for news weekly.

Seznam is a Czech web portal and search engine which has a popular news section, visited by three-quarters (74%) of respondents to our survey in a given week. Seznam links to partner websites such as Novinky.cz, Sport.cz, and Super.cz.

By accident or design, many of these national portals have become – and remain – important gateways to news. But like Facebook and Apple many have ambitions to be platforms and destinations in their own right. Through bundling and deal making they have forged a powerful position. It remains to be seen how well they survive the next wave of competition from new mobile first aggregators, social networks, and chat apps.

SECOND-WAVE CONTENT PRODUCERS

In recent years, a second wave of news companies has emerged that are focused on producing original content alongside business models that do not primarily rely on display advertising. Again this is a complex area to categorise, but we can subdivide these into brands that are focusing on global scale with income from advertising or increasingly from sponsored content, and those focusing on national niches and subscription models.

In the first category, our data show that the most successful companies in terms of reach have been BuzzFeed and the Huffington Post. Both have focused on distributing content through social media but are also building up destination websites and apps – along with a news voice of their own.

BuzzFeed has hired new staff and high-profile journalists in a number of countries including the UK and Australia, working on subjects like politics and the environment. It has also launched a new service in Japan this year. Everywhere, it has focused relentlessly on millennial audiences and is most popular with 18–24s. It has been developing new video formats including a number of non-news channels and in business terms makes money by selling its expertise in distributed content to commercial brands, though doubts have been raised about the scalability of this approach.[90]

The Huffington Post has focused on partnerships with traditional news providers such as *Le Monde* in France, L'Espresso group in Italy, and *El Pais* in Spain and is increasingly looking to share content across countries.[91] It is also refocusing its activities on video and sponsored content.

Both the Huffington Post and BuzzFeed have greatest reach in English-speaking countries, though both have made gains in other countries including France and Brazil over the past year.

Vice News operates in 24 countries – though locally produced content remains limited in most. It reaches only a small section of internet news users in most countries but twice as many under-35s.

SELECTED DIGITAL-BORN BRANDS' WEEKLY NEWS REACH, COMPARED WITH SELECTED TRADITIONAL BRANDS

	HUFF. POST	BUZZFEED	VICE	BBC	CNN	NEW YORK TIMES
USA	25%	16%	4%	10%	21%	14%
UK	14%	9%	2%	51%	2%	2%
France	13%*	4%	2%	3%	2%	2%
Germany	8%*	2%	1%	4%	3%	2%
Spain	14%*	3%	3%	6%	7%	–
Italy	13%*	2%	2%	8%	6%	3%
Greece	13%*	4%	7%	15%	11%	–
Ireland	11%*	10%	2%	22%	6%	5%
Australia	10%	10%	2%	14%	8%	4%
Canada	19%	13%	4%	9%	15%	6%
Japan	5%*	2%	–	4%	6%	2%
Weighted average (24 countries)	**11%**	**6%**	**2%**	**8%**	**8%**	**5%**

Q5B. Which, if any, of the following have you used to access news in the last week? *Base:* Total sample in each country. *Note:* Weighted percentage calculated using population data from Internet World Stats and the World Bank: weighted = (country population x percentage adults x percentage accessed)/total population of all countries surveyed. Brazil and Turkey are not included is weighting due to the absence of reliable data about its urban population.
*Joint ventures or former joint ventures

[90] http://blogs.wsj.com/corporate-intelligence/2013/01/04/buzzfeeds-business-model-scale-is-a-problem-and-thats-a-good-thing
[91] https://reutersinstitute.politics.ox.ac.uk/tags/jimmy-maymann

JOURNALISTICALLY LED NEWS BRANDS

In our second sub-category – and particularly in European markets – we see a number of journalistically led news brands that have emerged to become profitable based on donations or subscription models.

De Correspondent is a Dutch journalism platform that focuses on analysis and investigative reporting. In 2013 it raised around $1.7m in voluntary contributions for a site focusing on in-depth news. The site is ad-free and currently has over 40,000 members or subscribers, though content can be freely shared in social media. It reaches just 1% of respondents to our survey and 3% of under-35s.

Mediapart is a French online investigative and opinion journal created in 2008 by a former editor of *Le Monde*. It has become an important part of the French media landscape with 118,000 paying subscribers and 8% weekly reach in our survey. Mediapart employs over 60 staff with a turnover of around €10m.[92]

El Confidencial is one of several digital-born publications in Spain enjoying success with quality journalism. In our survey the site is the fifth most popular in Spain with 20% weekly reach. It employs over 100 staff, and is profitable, with most income from advertising. Journalistic redundancies from the traditional sector have fuelled a number of other Spanish start-ups such as El Español, which launched last year having raised €3.6m through crowdfunding and offers free content as well as a monthly subscription model.

Given the vast range of approaches, it is hard to draw broad conclusions about the digital-born market. The majority of start-ups, however, employ relatively few journalists and tend to cover a subset of the news landscape. Some focus on serving specific niches, whilst others focus on the lighter or fun side of news or provide a different take or voice on the news. They are also not immune to the rise of platforms and the move to mobile, trends which are making it harder for all publishers to build sustainable business models.

Digital-born brands have certainly added to the plurality of many media markets but they are a long way from replacing traditional media in providing comprehensive coverage on a wide range of stories as well as consistent in-depth journalism across the waterfront.

3.4 HOW AUDIENCES DISCOVER NEWS ONLINE

Although audiences still consume the majority of their online news from familiar and trusted brands, the way they access that content is changing. Our data show very different patterns of access across countries (see chart overleaf). In countries like Norway (63%), Finland (62%), and Denmark (55%), branded websites or apps are often the starting point for any news journey. By contrast, in Italy, Spain, Poland, or the Czech Republic a search engine is often the key gateway, with social media particularly important in Greece, Hungary, and Urban Brazil.

As we have seen in the previous section, sites or apps that aggregate news links are far more important in Korea (38%), Japan (43%), and the Czech Republic (36%) than elsewhere. Email is a core route to news in Belgium (40%) with more respondents saying they use it for news than directly accessing a website. It also plays an important role in Hungary (23%) and the US (20%) but is much less used in the United Kingdom (7%) and Finland (6%). Mobile alerts are increasingly important with Urban Turkey (21%), Sweden (16%), Portugal (16%), and Switzerland (15%) leading the way.

[92] https://blogs.mediapart.fr/edition/les-invites-de-mediapart/article/160316/building-independence

STARTING POINTS FOR NEWS – ALL COUNTRIES

	USA	UK	GER	FRA	ITA	SPA	POR	IRE	NOR	SWE	FIN	DEN	BEL
Direct entry	35%	47%	27%	27%	22%	38%	37%	41%	63%	42%	62%	55%	29%
Search	30%	20%	37%	35%	54%	50%	41%	34%	25%	27%	15%	16%	33%
Social media	35%	25%	21%	26%	36%	39%	41%	31%	33%	33%	24%	35%	27%
Aggregator	9%	6%	6%	5%	9%	10%	5%	7%	9%	11%	9%	5%	5%
Email	20%	7%	15%	22%	13%	15%	29%	8%	8%	9%	6%	18%	40%
Mobile alerts	12%	9%	8%	14%	9%	11%	16%	11%	9%	16%	5%	11%	8%

	NLD	SUI	AUT	HUN	CZE	POL	GRE	TUR	KOR	JPN	AUS	CAN	BRA
Direct entry	48%	46%	29%	48%	45%	27%	44%	41%	13%	12%	31%	33%	43%
Search	24%	38%	39%	36%	52%	62%	54%	67%	60%	38%	35%	36%	49%
Social media	31%	25%	33%	51%	34%	38%	55%	48%	18%	14%	36%	35%	52%
Aggregator	4%	5%	4%	16%	36%	8%	6%	13%	38%	43%	9%	7%	18%
Email	17%	14%	18%	23%	12%	14%	21%	16%	12%	14%	16%	14%	23%
Mobile alerts	13%	15%	10%	5%	3%	7%	8%	21%	12%	9%	8%	8%	13%

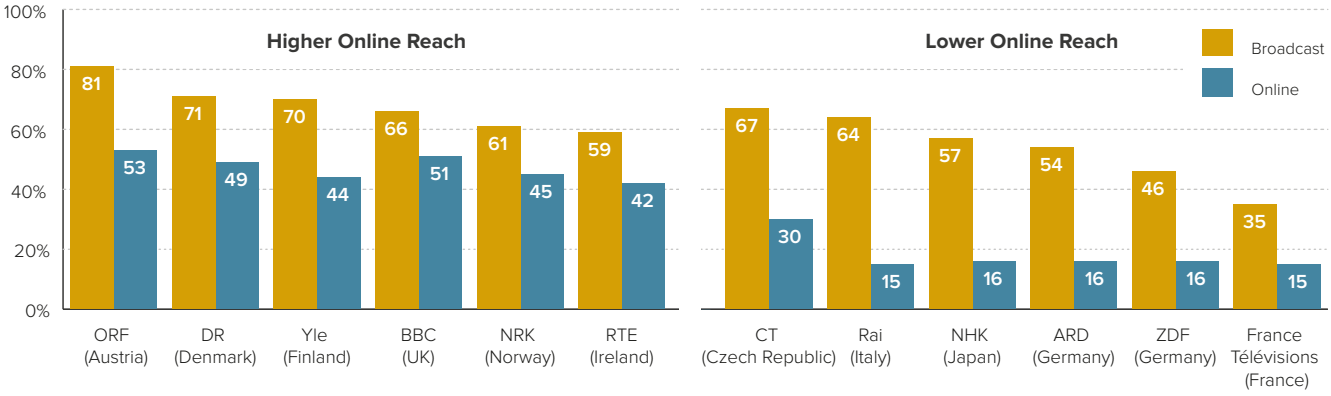
Q10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? *Base:* Total sample in each country

3.5 PUBLIC SERVICE BROADCASTERS

Public service broadcasters (PSBs) feature prominently in many of our country profiles (see section 2). Particularly in Europe, some PSBs are facing accusations of biased news coverage, pressures over funding along with renewed questioning of their role in a digital world. Some PSBs – such as the BBC in the UK – are routinely accused of unfairly dominating the marketplace, in particular because of the possibility that they are undermining paid providers by offering free and unlimited access to online news content.

It is perhaps easy to forget that, despite their strong offline performance, some PSBs still struggle to attract comparable online audiences for their news coverage. In France, Germany, and Italy, the online offerings of PSB TV reach around 15% with their news output, compared to around half for their offline PSB services. In contrast, PSBs in Scandinavia, Ireland, and the UK are among the most used news brands both online and offline. In Austria, ORF news reaches 81% via TV and radio, and 53% online each week. PSBs also tend to feature highly on our lists of what people say is their main news brand (see section 2).

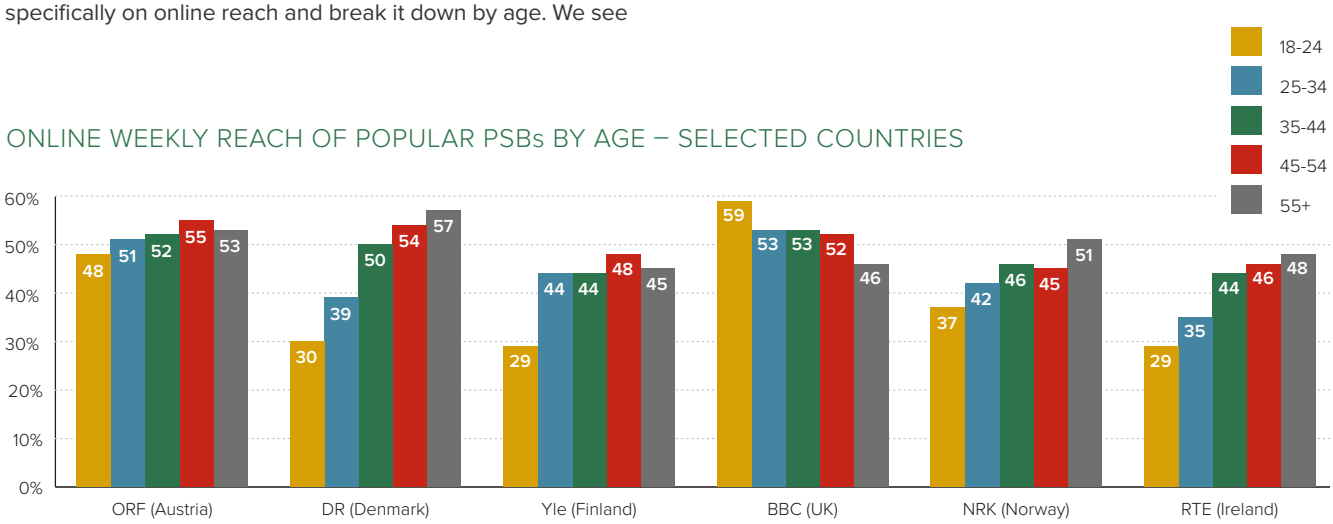
WEEKLY REACH OF PUBLIC SERVICE BROADCASTERS VIA BROADCAST AND ONLINE – SELECTED COUNTRIES



Q5a. Thinking now about news on TV, Radio and Print (traditional media), which of the following brands have you used in the last week? **Q5b.** Which, if any, of the following have you used to access news in the last week? Via online platforms (web, mobile, tablet, e-reader). *Base:* Total sample in each country

As more and more people access news online, it is becoming harder for some PSBs to fulfil their mandate to serve all groups within society. In our 2015 report, we highlighted that some PSBs are finding it difficult to reach those younger audiences who have turned their backs on TV news. This year we focus specifically on online reach and break it down by age. We see that even amongst those PSBs that have a large online reach, audiences in Scandinavian countries and Ireland are slightly skewed towards older users. ORF in Austria and the BBC in the UK appeal to different age groups more evenly, with the BBC particularly popular with 18–24s.

ONLINE WEEKLY REACH OF POPULAR PSBs BY AGE – SELECTED COUNTRIES



Q5b. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader). *Base:* 18-24/25-34/35-44/45-54/55+: Austria = 232/350/371/405/642, Denmark = 238/231/349/460/742, UK = 220/206/293/400/905, Finland = 185/411/341/422/682, Norway = 242/344/399/426/608, Ireland = 181/462/426/360/574

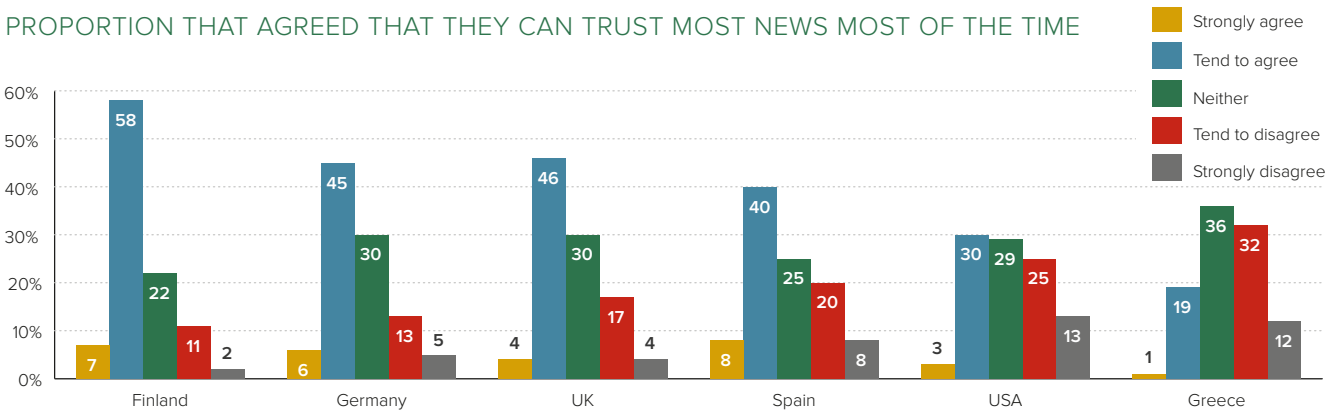
3.6 TRUST IN THE NEWS IN MORE DEPTH

This year we examine trust in the news media in more detail. We take a closer look at the drivers of trust, as well as the different levels of trust people place in digital-born news brands.

In addition to the survey research described throughout this report, we have also explored trust through eight focus groups in four countries: Spain, Germany, the US, and the UK. Taken together, the focus groups generated a number of specific hypotheses that we were able to put to the test using the survey data.

This subsection will primarily draw on data from six countries. We look in detail at the four countries for which we have focus group data, as well as Finland and Greece: two countries that are at opposite ends of scale in terms of overall trust in the news.

PROPORTION THAT AGREED THAT THEY CAN TRUST MOST NEWS MOST OF THE TIME

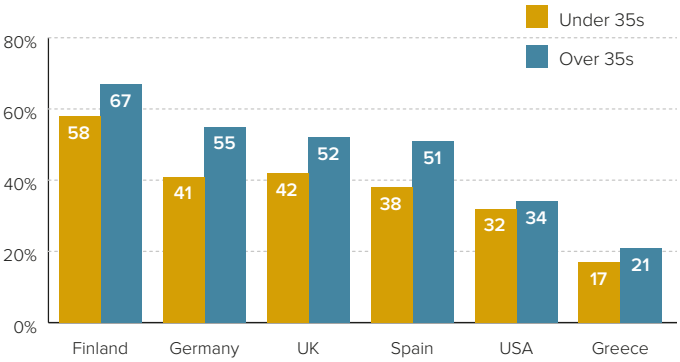


Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statements?: I think you can trust most news most of the time. *Base:* Total sample in each country.

Trust in the news does not map particularly well onto demographic variables. When we look at different countries, we find that different groups are more likely to trust the news. However, almost everywhere younger people tend to trust the news slightly less than older people, even after controlling for variables such as gender, income, education, and politics.[93] In Germany, for example, over half (55%) of over-35s say they trust the news, but this figure drops to 41% among under-35s. The difference in the US was too small to be significant (see chart right).

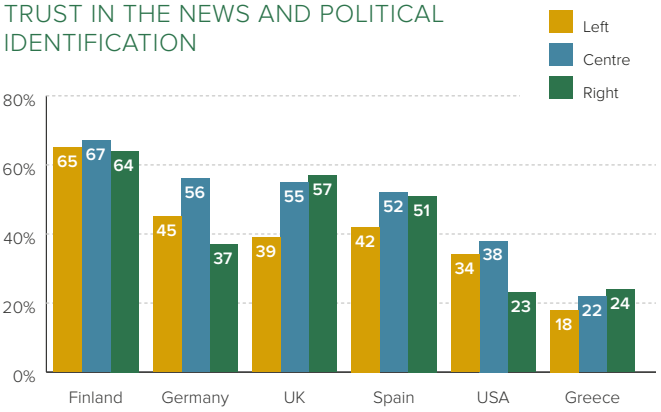
Political beliefs are also linked to trust in the news. However, the picture is complicated. In countries where trust is high, such as Finland, political identification tends not to have an impact on trust, with each group equally likely to trust the news. However, in the UK, although overall trust is fairly high (51%), right-wingers are more likely to trust the news than those on the left (see chart below).

TRUST IN THE NEWS AMONG UNDER-35s AND OVER-35s



Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statements?: I think you can trust most news most of the time. *Base:* Under-/Over-35s: Finland = 556/1485, Germany = 484/1551, UK = 426/1598, Spain = 639/1465, US = 504/1693, Greece = 598/1438.

TRUST IN THE NEWS AND POLITICAL IDENTIFICATION



Q6_2016_1. Thinking about news in general, do you agree or disagree with the following statements?: I think you can trust most news most of the time. **Q1F.** Some people talk about 'left', 'right' and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? *Base:* Left/Centre/Right: Finland = 389/824/355, Germany = 149/1485/69, UK = 468/1009/292, Spain = 626/1130/159, US = 476/871/591, Greece = 355/1231/173. *Note:* Respondents that selected "Don't know" at Q1F were removed from the analysis.

A consistent theme from the focus group sessions in all four countries was the view that trust in the news is strongly tied to trust in specific news brands.

We were able to put this to the test using our survey data. When we look at the strength of the association (or correlation) between overall trust in the news and a number of other potential drivers, we can see that there is a very strong link between trust in the news and trust in news organisations (0 indicates no association, and 1 indicates exact overlap). In all 26 countries trust in news organisations is the most important driver of overall trust, and is significantly more important than trust in journalists, and freedom from undue governmental influence. In other words, trust in the news is almost synonymous with trust in news brands. Of the different dimensions examined, perceived freedom from commercial influence was the least important driver of trust in most countries (see chart below).

DRIVERS OF OVERALL TRUST IN THE NEWS

	FIN	GER	UK	SPA	USA	GRE
Trust in news organisations	**.74**	**.82**	**.77**	**.76**	**.83**	**.73**
Trust in journalists	.68	.73	.64	.65	.75	.62
Freedom from politics	.49	.65	.53	.48	.61	.46
Freedom from commerce	.49	.61	.50	.50	.58	.42

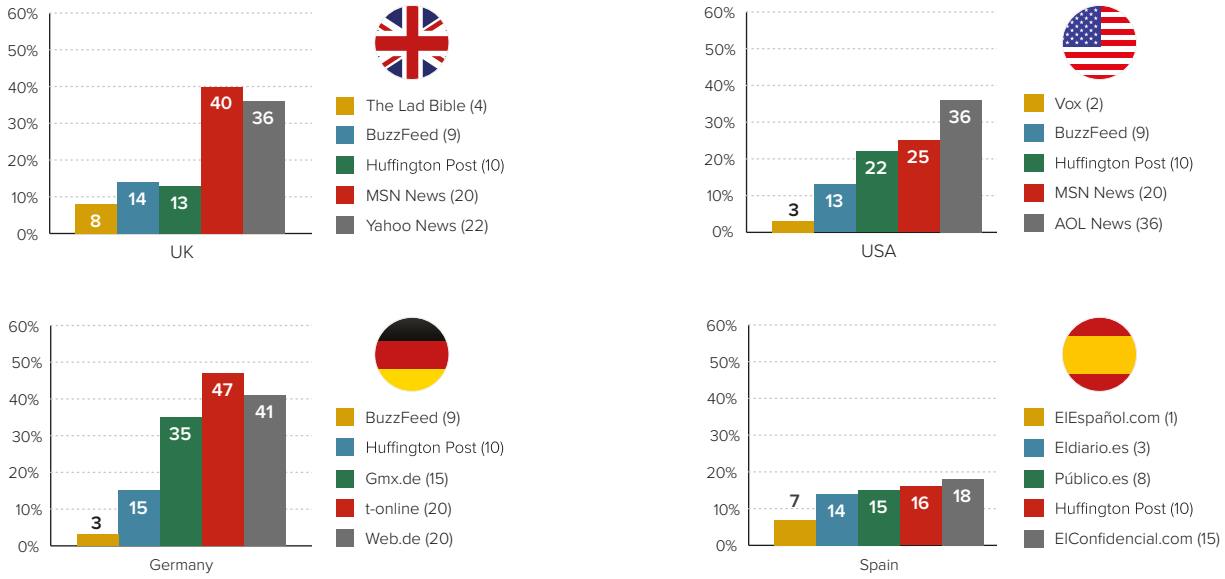
Q6_2016_1/2/3/4/5. Thinking about news in general, do you agree or disagree with the following statements?: I think you can trust most news most of the time/I think you can trust most news organisations most of the time/I think you can trust most journalists most of the time/the news media in my country is independent from undue political or government influence most of the time/the news media in my country is independent from undue political or government influence most of the time. *Base:* Total sample in each country. *Note:* A Pearson's product moment correlation test was used to compute the correlation coefficients. A Steiger's Z-test was used to test for differences between them.

Another point often made by our focus group participants was that trust in news brands takes a long time to build. Some news brands – typically those that have been around a long time – are often seen as main sources of news, whereas new players – even if they have a large reach – are thought of as secondary sources or 'guilty pleasures'.

[93] A series of ordinal regression models were used to test for significant associations with trust as measured on a five-point scale, and to simultaneously control for the influence of other demographic variables.

If we look at the proportion of users of each digital-born news brand who say that this is their main online news source (e.g. the percentage of users of Yahoo News who say it is their main news brand), we can see that the figures tend to increase for brands that have been active for longer. Indeed, if we group together all 32 of the digital-born news brands included in our survey in Germany, Spain, the UK, and the US, we see a strong correlation (.65) between the age of the brand and the proportion who say it is their main online news source. Regardless of their overall reach, brands like Yahoo, MSN, and AOL, which are now over 20 years old, are more likely to be a main source of news than brands like BuzzFeed and Huffington Post, which emerged in the last decade. New players like Vox in the US and El Español in Spain may take encouragement from the fact that their prominence in the minds of consumers will likely increase slowly over time. The main exception to this trend is Vice which, despite being present in one form or another since the mid-1990s, is only seen as their main source of news by 5% of its users in the UK and 8% in the US.

PROPORTION OF USERS OF DIGITAL BORN BRANDS THAT SAID EACH WAS THEIR MAIN BRAND, ORDERED BY AGE OF BRAND (IN BRACKETS)



Q5b. Which, if any, of the following have you used to access news in the last week? **Q5e.** Overall, which is your MAIN source of news when accessing using online platforms? *Base:* All who used The Lad Bible/BuzzFeed/Huffington Post/MSN News/Yahoo News Vox/BuzzFeed/Huffington Post/MSN News/AOL News in the last week: UK = 71/183/337/145/151, US = 78/340/562/369/150. *Base:* All who used BuzzFeed/Huffington Post/Gmx.de/t-online/Web.de ElEspanol.com/Eldiaro.es/Publico.es/Huffington Post/ElConfidencial.com: Germany = 32/161/267/298/300, Spain = 148/372/290/302/421. *Note:* The age of each brand was taken from Wikipedia. A Pearson's product moment correlation was applied to the data from UK, US, Germany and Spain. The test showed that there is a positive linear relationship between age of brand and proportion of users that said it was their main source: $r(31) = .65$, $p < 0.01$.

3.7 DISTINCTIONS BETWEEN HARD AND SOFT NEWS

This year we have collected more detailed data on the level of interest people have in different news topics across countries and between demographics. Political news is considered most important in Germany, Turkey, and the United States, partly no doubt due to the ongoing presidential election and the drama around Donald Trump's candidacy. International news is of particular interest in Germany and Austria as well as Ireland. Japanese are most interested in entertainment and celebrity news, with the Spanish, Danes, French, and Germans showing the least interest. Regional news is most important in Germany, Finland, and Spain, reflecting the relative importance of devolved political power in those countries and the media systems that have grown up around this.

But in addition to country-based differences we can see clear differences in gender, with men more interested in subjects like sport and politics and women paying more attention to stories about health and the environment. Again this plays into the debate over distributed content and may help explain why women are often less likely to directly access news websites dominated by politics and business.

INTEREST IN DIFFERENT TYPES OF NEWS BY GENDER – ALL COUNTRIES



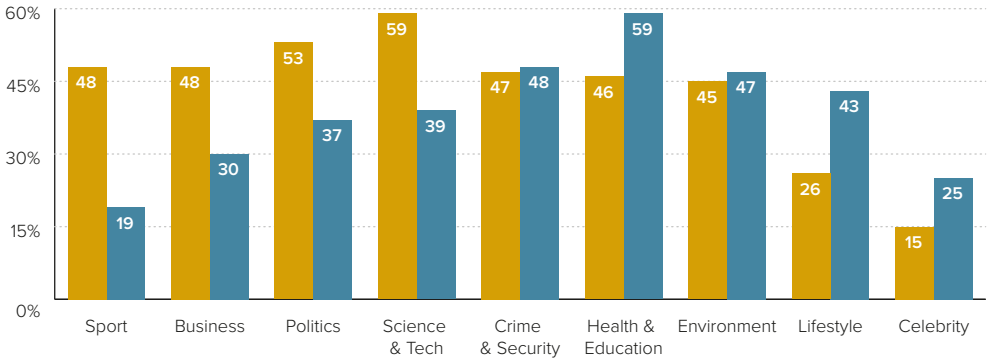
MOST INTERESTED

1. Local news
2. Science and Technology
3. International
4. Politics
5. Crime and Justice
6. Business
7. Health or Education
8. Environment



MOST INTERESTED

1. Local news
2. Health or Education
3. International
4. Crime and Justice
5. Environment
6. Lifestyle
7. Science and Technology
8. Politics



Q2_new2016. How interested are you in the following types of news? *Base:* Male/Female in all countries: 26098/27232

HARD AND SOFT NEWS

We can also divide consumers into groups based on their interest in 'hard' and 'soft' news topics. 'Hard' news is typically used to refer to topics that are usually timely, important and consequential, such as politics, international affairs and business news. Conversely, soft news topics include entertainment, celebrity, and lifestyle news.

We asked our survey respondents to rate their interest in several news topics on a five-point scale. We then used this data to compute average levels of interest in hard and soft news for each respondent. Subsequently we compared the scores for hard and soft news, and divided respondents into three groups; those who are more interested in hard news topics, those who are more interested in soft news, and those whose interest in both is the same.

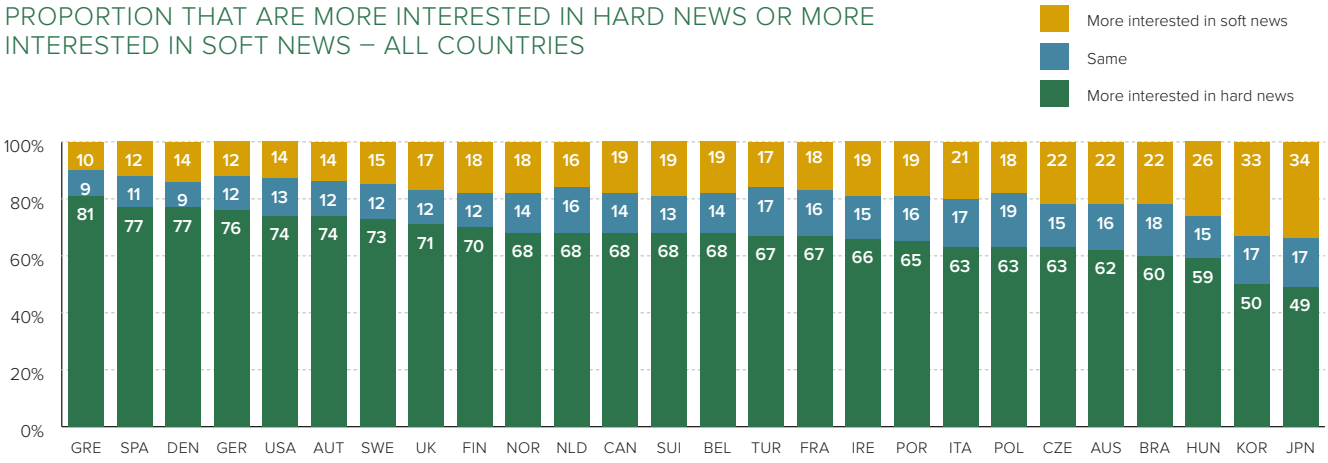
On average, in every country we see that interest levels are higher for hard news topics. However, this is likely to be influenced by social desirability bias (the idea that it is more acceptable to interested in certain types of news) as well the norms of the traditional news agenda. At the individual level, people with a high degree of interest in hard news also tend to be the most interested in soft news, and vice versa.

TOPICS INCLUDED IN HARD NEWS AND SOFT NEWS MEASURES

HARD NEWS TOPICS	SOFT NEWS TOPICS
International news	Entertainment or celebrity news
Political news	Lifestyle news
Business and economic news	Arts and culture news
Health or education news	Sports news

Yet we still see a significant minority in every country that report they are more interested in soft news topics than hard news. The size of this group varies country by country. Around one-third in Japan (34%) and Korea (33%) say they are more interested in soft news. However, less than one in five say the same in most other countries. The preference for hard news is particularly strong in Greece (81%), Spain (77%), Denmark (77%), and Germany (76%).

PROPORTION THAT ARE MORE INTERESTED IN HARD NEWS OR MORE INTERESTED IN SOFT NEWS – ALL COUNTRIES



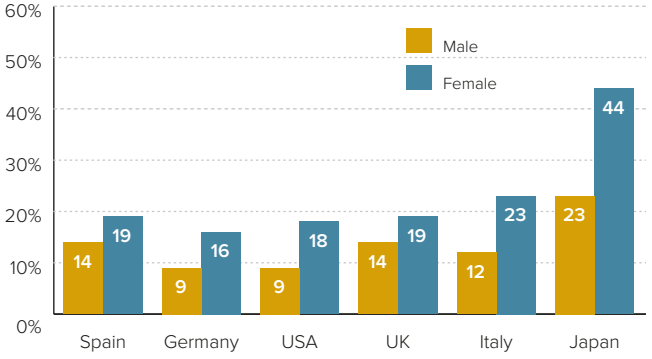
Q2_new2016. How interested are you in the following types of news? *Base:* All who indicated a level of interest in all news topics: Greece = 1972, Spain = 2061, Denmark = 1952, Germany = 1948, US = 2072, Austria = 1906, Sweden = 1980, UK = 1990, Finland = 1980, Norway = 1970, Netherlands = 1946, Canada = 1962, Switzerland = 1949, Belgium = 1954, Turkey = 2027, France = 2059, Ireland = 1943, Portugal = 1966, Italy = 2140, Poland = 1915, Czech Republic = 1973, Australia = 1962, Brazil = 1920, Hungary = 1965, Korea = 2069, Japan = 1943

If we focus on those that say they are more interested in soft news, we see that they are more likely to be young and female. In countries such as Japan and Italy, where interest in soft news is high, women are almost twice as likely as men to be more interested in soft news topics compared to hard.

In every country younger people are more likely to be more interested in soft news topics. Strikingly, over half of under-35s in Japan say they are more interested in soft news topics than hard news.

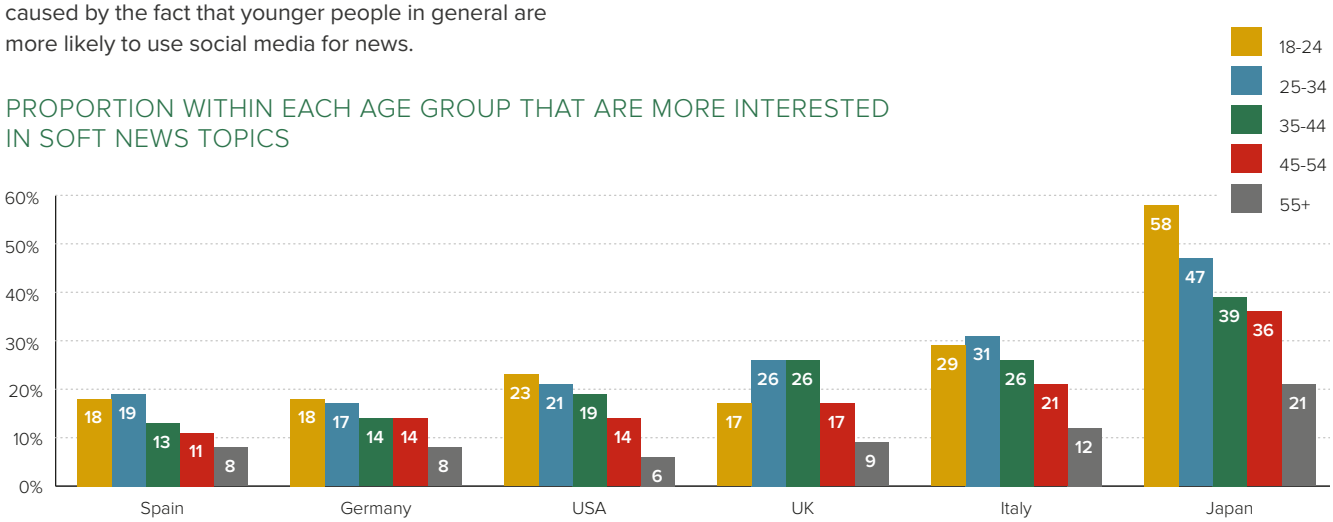
Of course, what people say they are interested in may not accurately reflect what they actually do. Nonetheless, we observe some differences in consumption among those that are more interested in soft news. Most noticeably, they are considerably more likely to say that social media is their main source of news. Over one in five of those more interested in soft news in Spain (21%), Italy (20%), and the United States (26%) say that social media are their main source of news. This has a knock-on effect for related aspects of offsite news consumption, with people who prefer soft news more likely to watch news video on social media, and more likely to participate in news coverage. However, this is in part caused by the fact that younger people in general are more likely to use social media for news.

PROPORTION OF MALES AND FEMALES THAT ARE MORE INTERESTED IN SOFT NEWS TOPICS



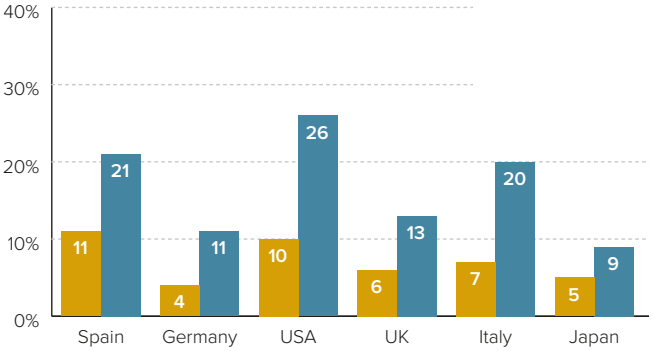
Q2_new2016. How interested are you in the following types of news? *Base:* All males/females who indicated a level of interest in all news topics: Spain = 1009/1051, Germany = 949/999, US = 1034/1039, UK = 962/1028, Italy = 1018/1121, Japan = 936/1007.

PROPORTION WITHIN EACH AGE GROUP THAT ARE MORE INTERESTED IN SOFT NEWS TOPICS



Q2_new2016. How interested are you in the following types of news? *Base:* All 18-24/25-34/35-44/45-54/55+ who indicated a level of interested in all news topics: Spain = 184/366/425/372/714, Germany = 186/275/352/360/777, US = 234/381/374/251/834, UK = 235/281/363/395/717, Italy = 183/317/418/375/846, Japan = 181/328/309/303/822.

PROPORTION OF THOSE THAT ARE MORE INTERESTED IN HARD NEWS AND SOFT NEWS TOPICS THAT SAY SOCIAL MEDIA IS THEIR MAIN SOURCE OF NEWS



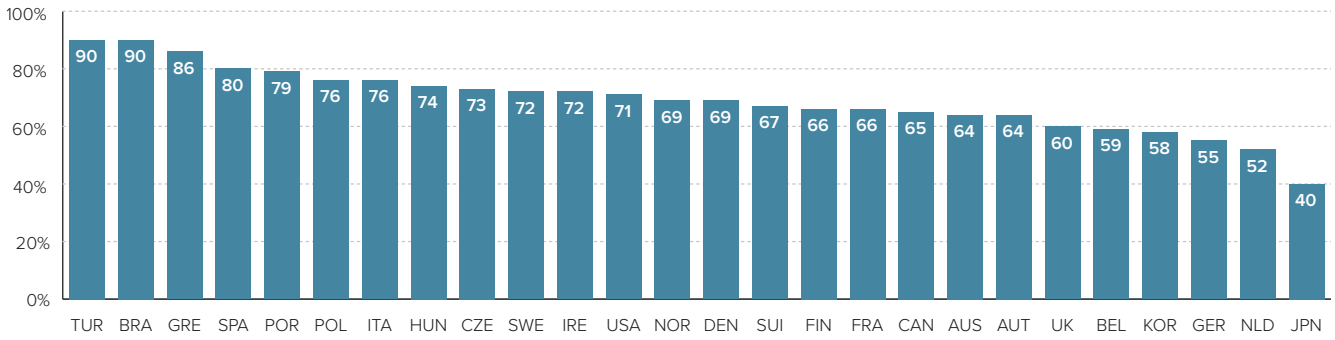
Q2_new2016. How interested are you in the following types of news? **Q4.** You say you've used these sources of news in the last week, which would you say is your MAIN source of news? *Base:* All those who prefer hard/soft news topics that used a source of news in the last week: Spain = 1572/243, Germany = 1442/229, US = 1480/270, UK = 1388/311, Italy = 1337/435, Japan = 929/625.

3.8 PARTICIPATION AND ONLINE NEWS

We have now been tracking the extent to which consumers participate or engage with the news – typically in the form of commenting and sharing – for several years. This section explores how online news participation has changed over time, the factors that drive participation, and some of the motivations for sharing news content.

We already know that consumers from some countries participate in news coverage more than those from others. News participation is particularly popular in Southern European countries – such as Greece (86%), Spain (80%), Portugal (79%), and Italy (76%) – compared to Western and Northern Europe, and a minority activity in Japan (40%).

PROPORTION THAT SAY THEY ENGAGE IN SOME FORM OF NEWS PARTICIPATION DURING THE AVERAGE WEEK

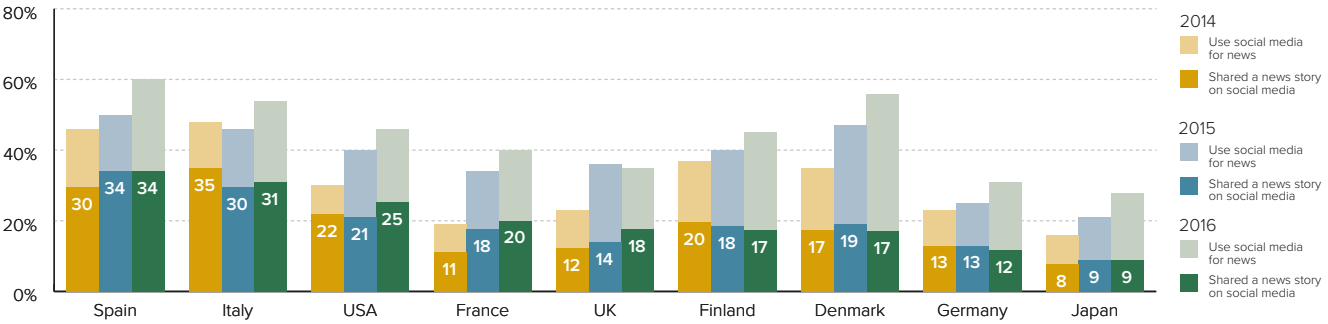


Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? *Base:* Total sample in each country. *Note:* News participation options are 'share a news story via social media', 'share a news story via email', 'rate, like or favourite a news story', 'comment on a news story on social media', 'comment on a news story on a news website', 'write a blog on a news or political issue', 'post a news related picture/video to social media', 'post a news related picture/video to a news website', 'vote in an online poll on a news website or social media', 'take part in a campaign around a news subject', 'talk online with friends/colleagues about a news story', 'talk with friends face-to-face about a news story'.

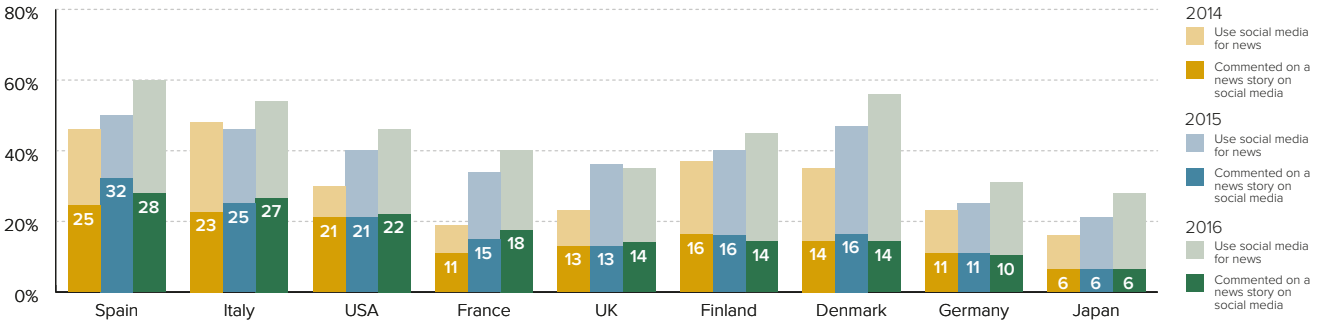
Perhaps more surprising is the fact that, in most countries, sharing and commenting (whether onsite and offsite) has remained at broadly the same level since 2014. In France and the UK we see small increases, but in Finland, Denmark, and Germany there are even indications of a slight decline.

Even if we narrow the focus and look only at sharing and commenting on social media, we see a similar pattern. The growth in the number that use social media as a source of news (the lightly shaded columns on the charts overleaf) is outstripping what little growth there has been in sharing and commenting on the news. As a proportion of social media news users, participation is falling in most cases. Most of those that have recently started using social media as a source of news are doing so as passive consumers.

PROPORTION THAT SHARED AND COMMENTED ON A NEWS STORY ON SOCIAL MEDIA COMPARED TO THE PROPORTION THAT USE SOCIAL MEDIA AS A SOURCE OF NEWS – SHARING NEWS ON SOCIAL MEDIA



COMMENTING ON NEWS ON SOCIAL MEDIA



Q3. Which, if any, of the following have you used in the last week as a source of news? **Q13.** During an average week in which, if any, of the following ways do you share or participate in news coverage? *Base:* Total 2014-2016 sample in each country

Sharing and commenting on the news is still largely the province of a small group of dedicated and highly motivated users. In almost every country, those with the highest levels of interest in the news, and those who access news the most frequently (referred to by us as news lovers) are considerably more likely to comment or share on social media than either daily briefers or casual users (see p. 89 for more on how the terms are defined), especially after controlling for age and other factors.

Sharing and commenting are not the only ways of participating in online news coverage. Engagement with the news can range from very 'active' forms of participation, such as writing a blog on a news issue, taking part in a campaign group, or submitting a video to a news organisation, to relatively passive forms, including rating/liking a news story, or simply talking to friends and colleagues about the news online.

On this basis, we have developed an ordered segmentation based on levels of participation. As described in the following image, we define proactive participators as those that have made an original or public contribution to news coverage. Reactive participators are those that have contributed by disseminating existing news coverage or leaving feedback. Finally, passive consumers – who make up just under half (48%) of our whole sample – are those that do not actively participate in news coverage at all.

SEGMENTATION C: PARTICIPATION

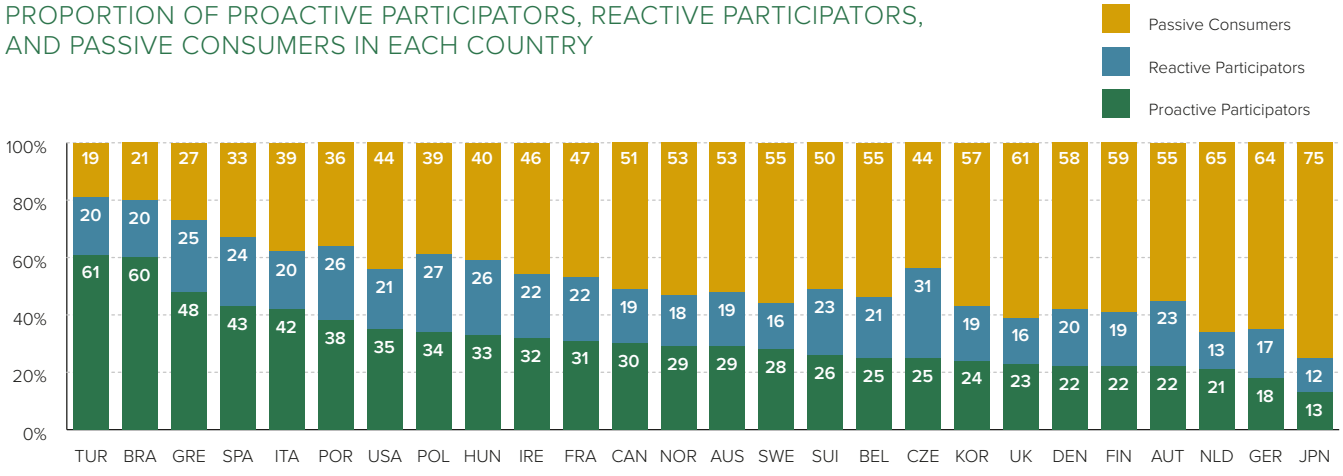
	PROACTIVE PARTICIPATOR	REACTIVE PARTICIPATOR	PASSIVE CONSUMER
Write a blog on a news or political issue	31%	X	X
Take part in a campaign or group based around a news subject			
Comment on a news story in a social network			
Comment on a news story on a news website			
Post or send a news-related picture or video to a social network site			
Post or send a picture or video to a news website/news organisation			
Share a news story via social network		21%	X
Share a news story via email			
Rate, like or favourite a news story			
Vote in an online poll via a news site or social network			
Talk online with friends and colleagues about a news story			48%
Talk with friends and colleagues about a news story (face to face)			
None of these			

Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? *Base:* Total sample in each country.

Consumers in Southern European countries – where social media are particularly popular – have a larger proportion who engage in the more active forms of online news participation. Elsewhere, including Asia, Scandinavia, and Western Europe, most online news users are passive, with a majority (as high as 75% in Japan) not engaging in 'reactive' participation such as sharing or rating news stories.

Not surprisingly, differences in degrees of participation are also heavily influenced by frequency of access and interest in the news. News lovers are more likely to also be proactive participators than casual users or daily briefers. Trust in the news is also a significant factor in most countries, with those with low levels of trust in the news slightly more likely to engage in the more active forms of participation. For example, in the US around a third (32%) of those with a high degree of trust in the news are positive participators, compared to 42% of those with low trust.

PROPORTION OF PROACTIVE PARTICIPATORS, REACTIVE PARTICIPATORS, AND PASSIVE CONSUMERS IN EACH COUNTRY



Segmentation C: Participation. *Base:* Total sample in each country.

Participation may also be motivated by a desire to correct what those with low trust see as falsehood or distortion. This theory is lent weight by a recent study of news commenting in the US by the Engaging News Project at the University of Texas at Austin.[94] Their data show that, of the many reasons why people comment on the news, some of the most frequently mentioned revolve around attempts to correct or verify information, and might typically be underpinned by low trust. For example, over a third of commenters (35%) said that they do this to 'correct inaccuracies or misinformation'.

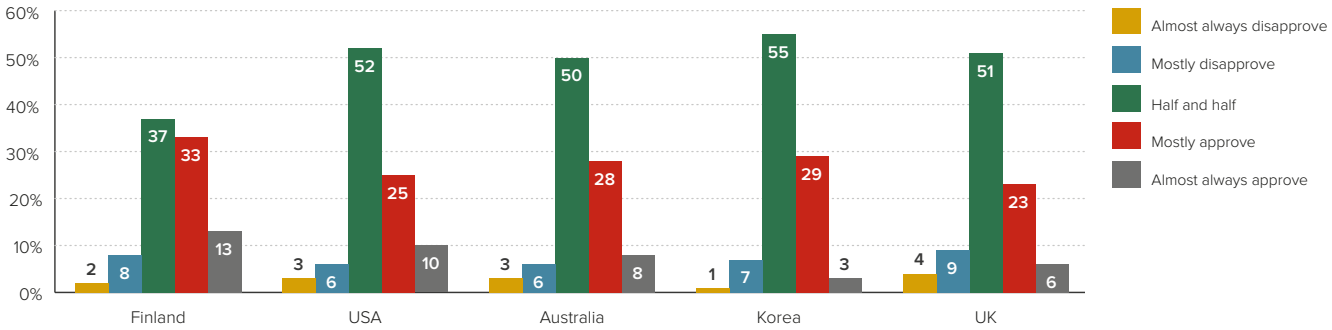
As with commenting, users have many different reasons and motivations for sharing the news. On balance, our data suggest that people usually share news stories because they in some way 'approve' of the coverage. But, in the five countries where we asked respondents about their reasons for sharing the news, most people said that half the time they share because they approve, and half the time because they disapprove (see chart below).

WHY PEOPLE COMMENT ON THE NEWS IN THE UNITED STATES

WHY PEOPLE COMMENT ON THE NEWS (AMONG THOSE WHO COMMENT)	
To express an emotion or opinion	56%
To add information	38%
To correct inaccuracies or misinformation	35%
To take part in the debate	31%
To discuss with others	31%
To educate others	29%
To applaud other people or actions	29%
To share an experience	27%
To note missing information	22%
To balance the discussion	20%
To ask questions	20%
To be part of the community	20%
To add humor to the discussion	18%
To show sympathy to others	15%
To persuade others	14%
To see how others react	10%

Source: https://engagingnewsproject.org/research/survey-of-commenters-and-comment-readers

PROPORTION THAT SAID THEY MOSTLY SHARE NEWS STORIES BECAUSE THEY APPROVE OF THE COVERAGE



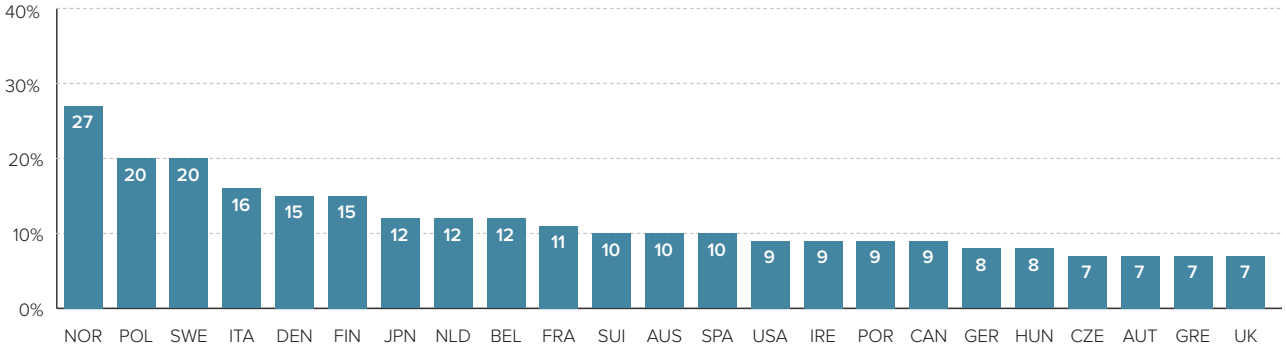
Q13i. You said that you share news content during an average week. Do you tend to do this because you approve or disapprove of the coverage? *Base:* All who shared a news story in the last week: Finland = 453, US = 807, Australia = 573, Korea = 380, UK = 487. *Note:* Those who answered "Don't know" are not shown.

[94] http://engagingnewsproject.org

3.9 PAYING FOR ONLINE NEWS

The issues surrounding paying for online news are more important than ever. As publishers struggle to generate sufficient revenue through advertising, they come under even more pressure to convince consumers to pay for access to digital content. On top of this, the rise of ad-blocking software has forced publishers to think seriously about their reliance on certain revenue streams. In this section we look at the potential drivers of payment, how much on average consumers are paying, and consider some of the potential barriers.

PROPORTION THAT PAID FOR ONLINE NEWS IN THE LAST YEAR

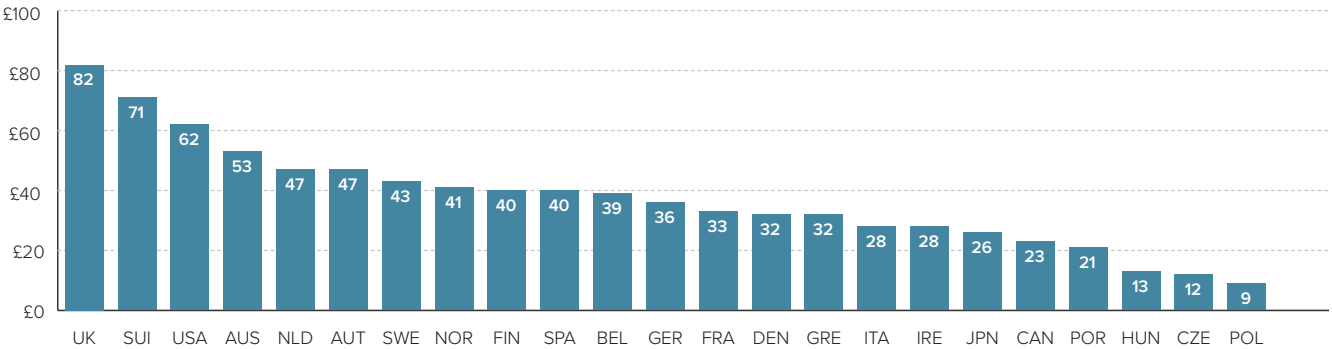


Q7a. Have you paid for ONLINE news content, or accessed a paid-for ONLINE news service in the last year? (This could be digital subscription, combined digital/print subscription or one-off payment for an article or app or e-edition). *Note:* Excludes Korea where a later poll showed online payment at 6% *Base:* Total sample in each country.

The above chart shows the percentage that paid for access to online news, whether in the form of digital subscription, combined digital/print offer, or one-off payment for an article or e-edition. However, simply looking at the raw number of people that have paid something for online news only tells part of the story. Arguably more important for publishers is how *much* people are actually paying.

If we look at the average (median) amount people say they have paid in each country, the picture is very different. Although figures should be treated cautiously due to the difficulty of reliable recall, large differences cannot be entirely ignored. In countries where paying for access to online news is relatively common – such as Poland and Italy – the average amount paid (in pounds sterling) is comparatively low. In contrast, in the UK – even though only 7% pay for online news – the average amount paid per year (£82) is higher than everywhere else.

YEARLY MEDIAN PAYMENT FOR ONLINE NEWS IN POUNDS STERLING



OPTQ7bi. How much have you paid for online news content, or for access to a paid for online news service in the last year? *Base:* All who paid for online news in the last year: Switzerland = 135, UK = 76, US = 135, Australia = 140, Netherlands = 120, Austria = 87, Sweden = 235, Norway = 284, Finland = 199, Spain = 150, Belgium = 115, Germany = 109, France = 130, Denmark = 142, Greece = 105, Italy = 242, Ireland = 138, Japan = 161, Canada = 125, Portugal = 95, Hungary = 121, Czech Republic = 98, Poland = 263, *Note:* Those who selected "Don't know" were excluded from the analysis.

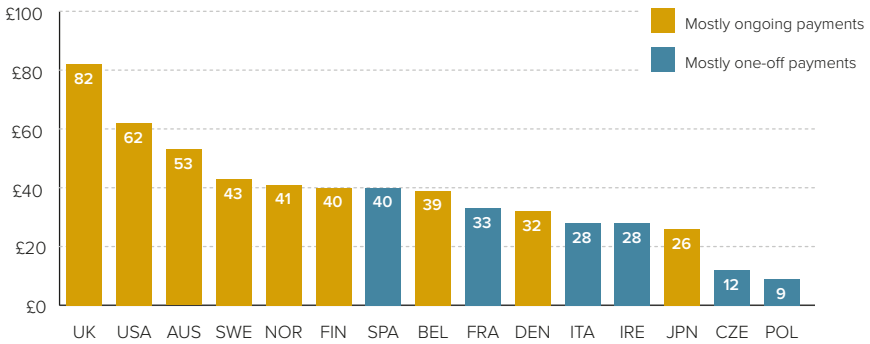
The average amount people pay is in part determined by specific national economic factors, as well as how much publishers choose to charge for access. Nonetheless, we see that the dominant payment model in each country heavily influences differences in average payment. In countries where most people pay for online news through ongoing subscriptions – such as the UK, the US, Australia, and in the Nordic countries – average payments tend to be higher. Nordic newspaper publishers in particular have seen success in targeting existing readers by offering print/digital bundles. Average payments are lower in countries where making one-off payments are the norm, such as Poland and Italy.

COUNTRIES GROUPED BY DOMINANT METHOD OF PAYMENT FOR ONLINE NEWS

MOSTLY ONGOING PAYMENTS	HALF AND HALF	MOSTLY ONE-OFF PAYMENTS
Denmark	Austria	France
Norway	Germany	Ireland
Sweden	Portugal	Spain
Finland	Netherlands	Poland
UK	Switzerland	Turkey
Australia	Brazil	Italy
Belgium	Canada	Czech Republic
Japan	Greece	
USA	Hungary	

Q7ai. You said you have accessed paid-for ONLINE news content in the last year... Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? *Notes:* A binomial test was used to determine whether one method of payment accounted for significantly more payments within a country. Countries where there was no significant difference between each payment type were placed in the half and half category.

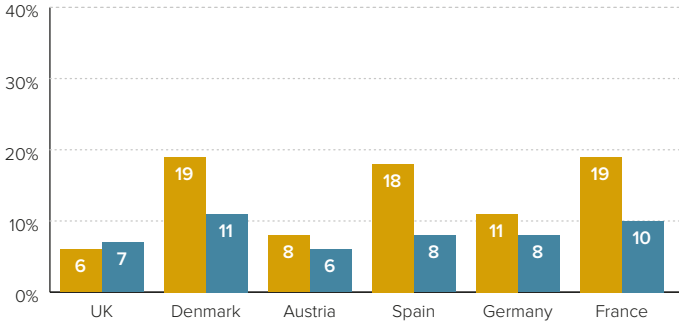
YEARLY MEDIAN PAYMENT (IN POUNDS STERLING) FOR ONLINE NEWS IN COUNTRIES DOMINATED BY ONE-OFF AND ONGOING PAYMENTS



OPTQ7bi. How much have you paid for online news content, or for access to a paid for online news service in the last year? If you have paid to different providers for online news, think only of the single provider you have paid the most to. If you can't remember the exact amount, please put your best estimate to the nearest pound. Please use whole numbers. *Base:* All who paid for online news in the last year in each country (see previous chart). *Note:* Those who selected "Don't know" were excluded from the analysis.

It is difficult to identify clear patterns in the data that point to those groups who are more likely to pay for online news. Although the presence of well-funded public service broadcasters (PSBs) with a large reach is often blamed for the lack of enthusiasm to pay for online news ('who will pay for online news if you go the website for a public service broadcaster for free?'), we find no evidence that online PSB news consumption has a negative effect on paying – even after controlling for numerous other factors (including age, gender, income, trust in news, and interest in news). Whether we look at countries where PSBs have a large online reach, or countries where their reach is small, we see no evidence of any significant negative effect.

PROPORTION OF ONLINE PSB USERS AND NON-PSB USERS THAT PAY FOR ONLINE NEWS



Q5b. Which, if any, of the following have you used to access news in the last week? **Q7a.** Have you paid for ONLINE news content, or accessed a paid-for ONLINE news service in the last year? (This could be digital subscription, combined digital/print subscription or one-off payment for an article or app or e-edition). *Base:* Does/Does not use PSB online: UK = 1033/949, Denmark = 965/974, Austria = 1037/900, Spain = 325/1728, Germany = 464/1475, France = 317/1717. *Note:* Those who answered "Don't know" at Q5b or Q7a were excluded from the analysis.

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THE CHALLENGING NEW ECONOMICS OF JOURNALISM

Mark Thompson
CEO, New York Times

Winter is coming. How many times have we heard that on HBO's hit drama *Game of Thrones*? But though we have sat through five series so far, not to mention any amount of torture, murder, and all-round unpleasantness, the sun is still obstinately shining. The battle-weary inhabitants of Westeros must be beginning to wonder if those thermals were really such a good investment.

Here's my warning. Winter really is coming for many of the world's news publishers. Indeed, this year's *Digital News Report* suggests that for some of them it is already here.

The economic challenge for any legacy newspaper company is simply stated: it is to grow digital revenue far and fast enough to offset the inevitable declines in print revenue, and at sufficient margins to defend – or increase – profitability. Many publishers have responded to this challenge by putting their faith in a model based on audience scale and digital display advertising. Surely advertisers would pay handsomely for the privilege of connecting with the vast audiences that all that free digital distribution would unlock?

Most of the new digital news providers were launched with business models which were parasitic versions of the same idea. They aimed to rewrite and repackage other people's journalism for much less money than it cost to originate it, and then to use superior technology to out-compete the legacy companies in distribution and advertising monetisation. Again the result would be rapidly growing audience and revenue.

These models now look suspect. Digital display advertising is quite different from print advertising. Publishers enjoy far less pricing power, and even the largest of us are dwarfed by those who dominate the field, players like Facebook and Google whose immense scale allows them to undercut everybody else. The concept of adjacent display – carried over from print – makes little or no sense on smartphone, which is increasingly the platform on which people get their news. Consumption is also switching rapidly from the publishers' own environments to Facebook, Snapchat, and other social media platforms; the *Digital News Report* suggests as much as 46% of news is now seen on social and messaging platforms in the US, 35% in the UK. This too puts direct and indirect pressure on pricing.

Finally, the end-user's experience of digital display advertising is often grisly, with sites overloaded with intrusive ads, and even some quality publishers giving over space to third-party 'content discovery platforms', who sell space to God knows whom. No wonder so many users are opting to block ads altogether.

> **"We believe that there is a good business to be built around offering digital advertising experiences which users actually find useful and enjoyable."**

There is another way. At the *New York Times*, we believe that there is a good business to be built around offering digital advertising experiences which users actually find useful and enjoyable. T Brand Studio, our branded content studio, didn't exist two-and-a-half years ago. Today its staff includes 70 journalists, videographers, designers, and engineers. We recently opened a second centre of operations in London.

We expect T Brand to deliver more than $50m in revenue this year. Smartphone advertising revenue – driven by new flexible multimedia ad units which present inside the content stream – is currently doubling year over year. Video, sponsorship, audio, virtual reality, and other innovations at the frontier of storytelling are all also part of our advertising growth strategy. Display still has a place, but we believe that the digital advertising of the future will be dominated by stories conceived by advertisers, clearly labelled so they can be distinguished from newsroom journalism, but consumed alongside that journalism on their own merits.

This is a more compelling and creative vision of digital advertising than conventional digital display, and it requires new skills, talents, and technologies, and substantial fresh investment. Audience scale and global reach will still count, but the audience which publishers will need to find will not be super-light users, the one-and-dones who spend a few seconds on many different sites, but truly engaged readers and viewers who are prepared to devote real time to content of real quality

and relevance. If this is the right direction of travel, many of the coping strategies adopted by the majority of news publishers in recent years – clickbait and other forms of audience-gaming, an obsession with the top-line number of monthly uniques – will prove to be not just ineffective, but actively counter-productive because they damage brand and reputation, and point newsrooms at the wrong audience targets and user experiences.

> **“The plain truth is that advertising alone will not support quality journalism.”**

In the developed world, adjacent display advertising in print and interruptive advertising in television and video have been the principal sources of funding of professional journalism. Both are now challenged and likely to come under increasing pressure in the years ahead. The plain truth is that advertising alone will not support quality journalism. News publishers with digital models, which rely solely or even mainly on advertising, will either have to find other sources of digital revenue, eke out a marginal economic future with very low levels of content investment, or go bust.

At the *New York Times*, we are building a digital subscription business of scale. Far from plateauing, the rate at which we are adding net new subscribers quarter-by-quarter is faster today than it was three years ago. I expect digital subscription revenue to overtake digital advertising revenue this year. Combined with other digital revenue streams related to the *Times* brand and our core business, together we expect them to approach half a billion dollars of revenue in 2016.

The *Digital News Report* suggests that few other news publishers are enjoying our success. It notes that the number of people paying for news in the US has fallen, and that some paywall strategies – like that of the *Sun* in the UK – have been abandoned. I’ve often heard the editors and CEOs of other newspaper groups say that the *New York Times*, and the handful of other successful pay models, are special cases from which they have little or nothing to learn. Indeed, there is a real air of defeatism in the industry about even the possibility of getting readers to pay.

It’s perfectly true that we have natural advantages – a large domestic market with few other national rivals, a strong pre-existing tradition of home delivery subscription, and a vast global opportunity. Most important of all is the fact that we continued to invest strongly in quality journalism when most of our competitors were decimating their newsrooms. But this is also about a mind-set: although we think there are powerful civic and commercial reasons for allowing very extensive free access to *Times* journalism – our pay model is far more porous than others – we believe that every story we do *should be worth paying for*.

Digital advertising will not be enough. Membership, freemium models, e-commerce, and events will be helpful, but again not enough. All news publishers need to ask themselves whether the journalism they produce is worth paying for. If not, they will suffer the same fate as a baker whose bread is not good enough to buy. Low-quality journalism adds little to plurality and democratic debate and, though it is lèse majesté to say so in our industry, society will probably not miss it very much.

> **“All news publishers need to ask themselves whether the journalism they produce is worth paying for.”**

If you conclude instead that your journalism is worth paying for, or can be made so by increasing rather than cutting newsroom investment, the task then is to acquire the brand and direct marketing strategies and skills needed to shape the offer and take it to market. This is a mighty challenge on its own. Once print and TV news enjoyed such privileged distribution and prominence that it largely marketed itself. Now, we must go out and actively seek audiences like everyone else. That requires humility as well as considerable effort and expense, but there is no alternative if we are to build sufficiently large, deeply engaged audiences.

And there’s something else. The separation of advertising sales from editorial decision-making, and the need for absolute clarity about what is newsroom content and what is commercial messaging, both remain essential. But, beyond these critical segregations of duty and of user experience, newsrooms and commercial divisions of news organisations must become far closer strategic partners than is generally the case today. An editorial strategy with no revenue context is a forlorn hope. A strategy created solely by the ‘business side’, whatever that is, is a waste of good Powerpoint.

> **“Newsrooms and commercial divisions of news organisations must become far closer strategic partners.”**

Editorial and commercial leaders need to work together on integrated strategies which combine editorial mission and standards, user experience, innovations in data, technology and creative design, and radically new approaches to monetisation. Not five different strategies, not even ‘aligned’ editorial and commercial strategies, but a single shared way forward. Until very recently, there was a sense that the editorial leadership of news organisations should somehow be protected from the business model challenges which this industry faces. Carry on down that road for much longer and you will founder.

Editors need to co-create and co-lead the necessary transformation of both news report and business. At the *New York Times*, we have one strategy and Dean Bacquet, our executive editor, and his senior newsroom and editorial colleagues, are just as responsible for devising and implementing it as I am as CEO.

In the coming storm, newsrooms and commercial departments who try to ignore reality, or each other, will catch their death from cold. Those who put quality and audience experience first, and figure out how to work effectively as a unified team will be well placed, not just to survive, but to grow stronger.



WHY TRUST MATTERS

Ed Williams
CEO, Edelman UK & Ireland

How often do we think about trust in our daily lives? There are numerous occasions on which we unconsciously test some experience against the question: is this the right thing for me to do/buy/eat/believe? Sniffing food before eating it is an example of an unconscious trust test. Will this ice take my weight? Do I trust that driver to respect the pedestrian crossing before I step out? But it's rarer for us to test consciously and deliberately whether we trust something.

One area where it does happen though, and often, is with the news. In print or on screen, we find ourselves challenging the veracity of news reports all the time. 'Life on Mars!' screams the headline. Really? Is that actually Kim Kardashian's [insert body part here]? Do I believe in anonymous sources? Did somebody pay the newspaper to run this story? Can I trust the journalist, or the editor, or the proprietor to give me an honest report? Or do I not care whether the 'news' I see is true or not, just so long as it's entertaining?

In Britain, we have a long history of independent journalism, although not as long as we like to think. The presence of august organisations such as the BBC, Reuters, or the *FT*, all of which we – and much of the world – instinctively trust to be unbiased, cements the feeling that we are protected rather than misled by the media.

Yet, as verified not only by the Reuters Institute research, but also our own Edelman Trust Barometer data, in Britain we do not actually trust the media overall. Even including those organisations of high reputation, the Barometer tells us that only 55% of Brits trust the traditional media (defined as broadcasters and newspapers, including their web offerings) to do the right thing. The *Digital News Report* offers a similar figure, showing trust levels at 50%.

This seems unimpressive, even worrying, but in fact the UK is about mid-table in terms of trusting the media, on the face of it. Dig down a little into the data, however, and another trend emerges: a disparity – perhaps unsurprising – between levels of trust based on the type of media.

This shows television news main bulletins score between 69% and 74% in the Edelman data (Edelman Trust Barometer 2016, UK supplementary research). At the other end of the scale, red-top newspapers score between 37% and 42%. Middle-market British papers scored between 46% and 55%, while what used to be called broadsheets are trusted, on average, by between 58% and 66% (Edelman Trust Barometer 2016, UK supplementary research).

These figures seem reasonable until one explanatory aspect is introduced: these are the trust figures for people who actually read those titles. Among those who are not paying customers, trust in the lower end of the market is in a range of 9% to 17%, in the mid-30s for mid-market, and mid-50s for the 'heavies' (Edelman Trust Barometer 2014, unpublished research). Accordingly, it's tempting to assume that this is a recent phenomenon, provoked perhaps by the phone-hacking scandal of 2011 and a series of high-profile trials that followed in which journalists were cast in an unfavourable and disagreeable light. But that is not supported by research. Again, from two sources: our tracking data from before the time that phone-hacking hit the headlines shows trust levels in the media immediately after the scandal only three percentage points lower than in our most recent survey; and EU study from 2010 places UK newspapers rock bottom in a survey of 27 member nations when people were asked if they trusted newspapers to tell the truth. Britain's press scored 18%, compared with an EU average of 43%. The next least trusted national newspaper industry, in Greece, recorded a trust level of 28%.

Of course, to some extent this is a global issue. The wider news spreads, the more it gets questioned. The more information people are exposed to, the more they have to exercise their critical faculties. It is a supply-side issue as well: the more sources that come into being, the more contradictions in reports of the same story will be thrown up. And it is an issue of technology and malign intent: the more digital tricks that become available to propagandists and hoaxers, the less trust we ought to place.

The fact is, in the face of an expanding universe of information, every day increasingly feels like April Fool's Day. But does all this really matter? Well, I would argue that it does. The fact of the matter is that the amount of trust that people are able to place in the institutions that govern or inform their lives accords closely with their sense of happiness. So in a broad, societal sense, it matters whether or not our media is trusted.

> **"In the face of an expanding universe of information, every day increasingly feels like April Fool's Day."**

A drop in trust of media among the mass of the population has come in a general atmosphere in which institutions and other areas of public life have been tarnished all over the world. Just think of Parliament (expenses), sport (FIFA or doping), the financial services industry.

These scandal-led impacts on trust intertwine with a heightening of awareness of inequality across societies and an increasing distrust of elites, reflected in the emergence of candidates who stand (some more than others) outside the norm of politics.

It is a simple evil for us all if people do not trust what they read or hear or see. Any examination of political rhetoric shows how facts have been subsumed into the same calculations of value as opinion; balance in arguments is harder and harder to achieve and public discourse becomes shallower and more partisan, whether held in legislatures or on Twitter.

> **"The Trust Barometer makes it very clear every year that when people trust a company, they buy their products."**

So, in that context, it certainly matters that an increasingly large group of people are cynical about what they read, and that is particularly important when it comes to critical public issues such as the UK's referendum on its membership of the EU. More simply, it is also a matter of commercial survival for the media companies in question. The Trust Barometer makes it very clear every year that, when people trust a company, they buy their products, they pay a higher price over comparable products, and they recommend them to friends.

Everybody knows that media companies, particularly publishers, are struggling with a grim outlook of plunging advertising revenues in print and digital, falling circulation, and the commoditisation of news online. This year has started dismally for them. The first quarter has seen the forced marriage of two great Italian titles, *La Repubblica* and *La Stampa*, the closure of the *Independent* in print, massive job culls at the *Guardian*, and further cuts rumoured in other UK groups. In countries such as Norway, where the government already subsidises local newspapers to stay open, there are urgent debates about whether to cut down the activities of the state broadcaster to help the online editions of newspapers survive. On the face of it, there are very few industries more in need of the boost that could be offered by increased trust than the news industry.

As it happens, there is no probable correlation between trust in the media and willingness to pay for online news, as recorded in the *Digital News Report*. But surely it is not a coincidence that the country which is rock bottom in terms of trust in the press (as opposed to the media generally) is also least likely of the markets surveyed by the Reuters Institute to pay for, or to consider paying for, online news?

There are of course other reasons why Britons won't pay for online news – the commercial companies point to the huge and somewhat overbearing presence of the publicly funded BBC and they have a point, although the *Digital News Report* shows that payment levels are far higher in other countries – Finland, Sweden, Norway, Korea – where there are also powerful national broadcasters.

However, before we jump to connect the dots, we should think a bit harder: it's probably just as likely to be true that many people no longer visit media outlets to get 'trusted' information. They go for fun. Or outrage. Qualitative research based on the Trust Barometer findings shows that people are likely to rate trustworthiness much lower as a reason for loyalty to a news source than how 'informative' – for which read gossipy – or whether or not the source is free.

And wasn't that always the case? News consumers are sophisticated, as they show in the *Digital News Report* every year. They know they can trust some sources more than others and they don't mind. But if they can't trust a source, their view is, why should I pay for this? The inevitable conclusion is that trust isn't a market-mover for every media owner, but for those who are going to rely on being paid online, it strikes me as being rather important.

All the evidence of recent history suggests that the advance of technology and the continued multiplication of news sources will only widen the split between those who trade in trust and those who trade in sensation. In other words, nothing changes except the technology. Nothing changes except the pace of change.



PEOPLE WANT PERSONALISED RECOMMENDATIONS (EVEN AS THEY WORRY ABOUT THE CONSEQUENCES)

Rasmus Kleis Nielsen
Director of Research, Reuters Institute

In recent years, news organisations like the BBC and the *New York Times* have worked to offer more personalised news through their websites and apps, based on what topics people indicated they are interested in or in some cases auto-generated recommendations based in part on the content they have used in the past.

The German publishing group Axel Springer has launched Upday, a new mobile news aggregation developed in partnership with Samsung that tracks users' reading habits and automatically selects a personalised stream of content from across the web. The *Washington Post* is just one organisation working on developing a chatbot to automatically deliver personalised news to individual users through messaging apps. More widely, digital intermediaries including Google, Facebook, and Twitter offer algorithmically generated personalised search results, news feeds, and timelines whether we use them for news or other purposes.

Clearly, the era in which news was a fairly stable product, published or broadcast in a single fixed form which people could pay attention to or not is gradually coming to an end. A rapidly developing combination of responsive design, automated display decisions, and increasingly detailed individual-level data allow both publishers and platforms to deliver more tailored content and services. The news you get will increasingly depend on who you are, where you are, and what the publisher or platform you access news via know about you, people like you, and people around you.

This development worries some journalists and public intellectuals. Personalised recommendations may undermine editorial control. Many journalists think they, not recommendation engines or social filters, ought to determine what news people get. Automated display decisions may lead to filter bubbles (where we only get news that confirm our existing views), algorithmic discrimination (where news is customised in ways where people miss out on important information, for example, poor people getting little or no financial news), and raise privacy concerns (as they are based on collecting individual-level data about users).

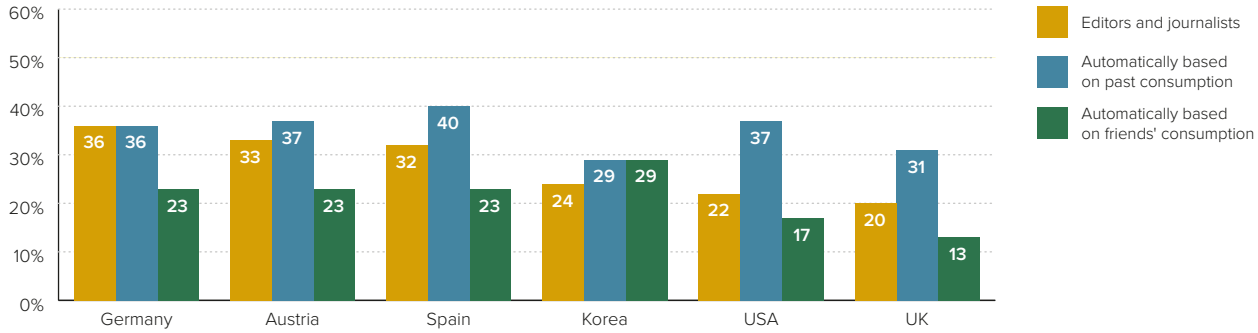
Our 2016 survey shows that ordinary people across the world share these concerns, but at the same time embrace automatically generated personalised recommendations.

Strikingly, when asked to rate three different ways of getting news – (1) having them selected by editors and journalists, (2) having them automatically selected on the basis of an individual's past consumption, and (3) having them automatically selected on the basis of what friends consume – in almost every country, personalised recommendations based on a person's own past consumption comes out number one (see chart overleaf).

More people say they prefer personalised recommendations as a better way to get news than when it is editorially selected or based on social recommendations. Algorithms are more popular than journalists, as long as the algorithms are based on people's personal consumption. Editors are consistently preferred to social recommendations in almost every country. The differences are not huge, but they are consistent and significant across most countries. There are generational differences that vary somewhat from country to country, but broadly speaking, younger people are more likely to agree that personalised recommendations and social recommendations are good ways to get news online.

When it comes to getting news, most people, in short, trust themselves more than they trust journalists, and trust journalists more than they trust their wider circle of friends and acquaintances.

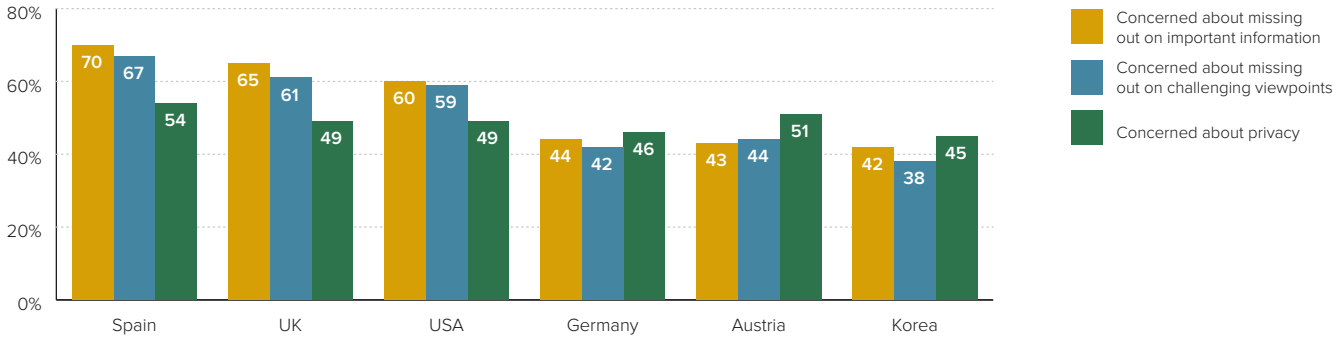
PROPORTION WHO THINK THAT EACH SELECTION METHOD IS A GOOD WAY TO GET THE NEWS (SELECTED COUNTRIES)



Q10D_2016a_1/2/3. Please indicate your level of agreement with the following statements: Having stories selected for me by editors and journalists is a good way to get news/Having stories automatically selected for me on the basis of what I have consumed in the past is a good way to get news/Having stories automatically selected for me on the basis of what my friends have consumed is a good way to get news. Base: Total sample in each country.

At the same time most of our respondents are concerned about the consequences of a move to a more personalised news environment. Across all 26 countries surveyed in 2016, people tend to be worried that more personalised news may mean that they miss out on important information and challenging viewpoints. Concerns over both filter bubbles and algorithmic discrimination are clearly widespread, *even as people say that personalised news is a good way to get news*. Similarly, when asked, people also worry about privacy; in Germany, Austria, and South Korea more than they worry about the other issues at stake.

PROPORTION WHO ARE CONCERNED ABOUT EACH POTENTIAL CONSEQUENCE OF PERSONALISATION (SELECTED COUNTRIES)



Q10D_2016b_1/2/3. Please indicate your level of agreement with the following statements: I worry that more personalised news may mean that I miss out on important information/I worry that more personalised news may mean that I miss out on challenging viewpoints/I worry that more personalised news will mean my privacy is placed at greater risk. *Base:* Total sample in each country

In this way, people's engagement with personalised news recommendations reflects a broader trend – many of us rely every day on digital services that deliver extraordinary functionality and great ease and convenience, even if we may have doubts and reservations about how they actually work.

This illustrates the very pragmatic way most of us are engaging with digital media, media that we use and enjoy even when we do not understand them and are aware that they are in some cases premised on trade-offs that upon closer scrutiny can seem worrying. We may not trust algorithms very much when we stop to think about how they work, but the services they enable are amazing and we would not want to be without them.

For news organisations like the BBC, the *New York Times*, Axel Springer, and many others working on their own automated personalised recommendations services, the results of our 2016 survey are both encouraging and worrying. Encouraging because they suggest that, as people get accustomed to algorithmically generated search results and

recommendations of the 'if you like this, you might also like'-type more widely, many want similar types of personalised recommendations for news, based on their own past consumption. Worrying because editorial selection – a key part of the identity and brand of news organisations – is not an especially highly regarded way of getting news, and because the standards by which we judge the quality of automatic personal recommendations tend to be set by large search engines and social media companies and others with more data, more engineering talent, and more resources than any news organisation. What works for Amazon may not work as well for the *Arkansas Democrat-Gazette*.

This suggests that news organisations that want to build personalised recommendation systems – for their websites, apps, and perhaps in the future chatbots – will need to find a balance between editorial selection, personalised selection, and an element of the generally less highly regarded social selection, as they sort out data and technology. The challenge is to deliver content to people that speaks to their individual interests and also connect them with the wider world while simultaneously demonstrating the value of getting this content from, specifically, a news organisation – rather than one of the giant digital intermediaries that are constantly advancing the frontiers of automated content and service delivery. The challenge is to do this in a world where people certainly have reservations about algorithms, but many have even more reservations about journalism. As one participant in one of our UK focus groups said: 'I think that I would probably trust an algorithm more. If this was an editor that I didn't know or an algorithm I didn't know, an algorithm won't have an agenda and it will offer a more wide range of sources' (20–34 year old, UK Focus Group).

News organisations that believe in the value of editorial selection and have built their brand and identity around this belief thus face a two-fold challenge. How can they leverage the power of personalised recommendations without undermining the value of their editorial work, and how can they convince more people that getting news from editors and journalists can actually be a better way of getting it than getting it filtered by algorithms?



THE TOPOGRAPHY OF TRUST: VIEWS FROM UK NEWS CONSUMERS

Alison Preston
Head of Digital Literacy, Ofcom

This essay examines the factors that shape people's trust in news with a focus on the UK. Given the range of platforms used for news and the variation in the numbers of sources used, the reasons people have for trusting the news are also quite diverse. Many of these reasons remain constant, such as the need for a news brand to be reliable, impartial, and accurate; to have built up a reputation over time; to be consistent.

However, other reasons that emerge in this quantitative and qualitative research have the potential to be more disruptive, such as trust being allotted to sources which are more 'direct' rather than mediated, and to sources which display a transparent, 'congruent' ethos – potentially regardless of the particular editorial stance they might take. In addition, some people are taking a more active role in deciding whether or not to trust their news sources. They are aware that there are a wide range of views and that they need to make a number of judgements about the veracity of what they are consuming. And finally, there is a need to consider the normative dimensions of trust – to what extent does a lack of trust in news signify considered due caution, or disaffected cynicism?

This essay explores these themes, focusing on the UK data in order to compare and contrast the views and habits of younger and older news users. It draws upon both the quantitative online survey and the qualitative focus groups carried out with active news users in a range of countries including the UK.[95]

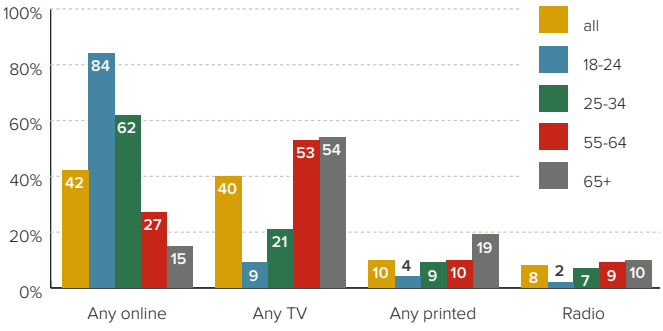
NEWS CONSUMPTION HABITS ARE STRONGLY STRATIFIED BY AGE

As initial context, it's useful to remind ourselves of the extent to which different age groups prefer different types of news source, as Figure 1 illustrates. When asked for their main type of news source, 9% of online news users[96] aged 18–24s nominated TV, compared to 54% of those aged 65+. Conversely, 84% of the 18–24 group nominated any online news source, compared to 15% of those aged 65+.

FIGURE 1:
MAIN SOURCE USED FOR NEWS (Q4)



Single main source used



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news? *Base:* All/18-24s/25-34s/35-44s/45-54s/55+ who have used at least one source of news in the last week: UK = 1960/204/194/279/389/894

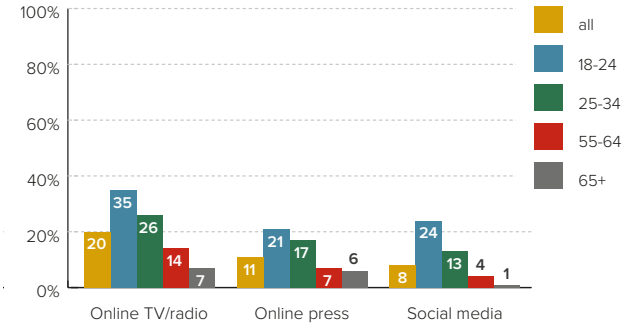
[95] While the quotes in this essay come from the two groups held in London, wider research findings from the cross-national groups are also included.

[96] The Digital News Survey is conducted online and comprises a sample of online news users. Respondents are therefore more likely to use online forms of news than respondents in face-to-face surveys.

Social media is the preferred source for one quarter (24%) of 18–24s, compared to 1% of those aged 65+. That said, when the types of online news source are examined, 'traditional' broadcast and print sources online account for 55% of 18–24s' preferred news sources, showing that younger people's preference for online is currently as much about the means of access rather than the type of news brand being consumed.

FIGURE 2:
MAIN SOURCE USED FOR NEWS (Q4)

Breakdown of types of online source used



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news? *Base:* All/18-24s/25-34s/35-44s/45-54s/55+ who have used at least one source of news in the last week: UK = 1960/204/194/279/389/894

It is clear that for younger age groups in particular, news is being accessed on new platforms. To what extent does this mean that multiple sources of news are being consumed? When online sources of news are compared, younger people are twice as likely to be using a variety of sources as older age groups – 17% of 18–24s use five or more online sources compared to 11% of 55–64s and 8% of those aged 65+. And there remains a significant minority – around one quarter – across the age groups who only use one online source for news. Attitudes about trust are likely to be coloured by the extent to which people are accessing many or few news sources. Using a variety of sources with different editorial stances can bring an awareness of the fundamental subjectivity in news provision; this can lead to heightened scepticism about the veracity of news outlets, but can also result in increased trust and affinity for those sources that are judged to be reliable.

ACCURACY AND IMPARTIALITY REMAIN CORE ATTRIBUTES OF TRUST

The qualitative focus groups provide a reminder of the varied dimensions of trust for news users. Accuracy and impartiality remain fundamental pillars of trust for many. If news is to be trusted, it needs to provide a coherent, consistent, accurate overview of the news story, thoroughly researched and checked. As one focus group participant described in more general terms:

> "You've always got that friend that'll just tell it as it is and then you've got that friend that'll just exaggerate and elaborate … There's the good storyteller but then there's the person that will actually tell you what actually happened."
>
> *(20–34 Female, US Focus Group)*

This requirement for accuracy is overlaid with a need to be familiar with the news brand, to know what to expect from them, which in turn is connected to a need for a news brand to have integrity, or a set of values that the user identifies with.

> "I find it's the editorial style which gives it credence. If it's well written and it's easy to read and it isn't glaring. Say for instance the style doesn't change from article to article. That's what the job of the editor is to do is kind of like coalesce all these wildly creative writers to kind of form a singular sort of consensus and thread inside of the newspaper."
>
> *(20–34 Male, UK Focus Group)*

For some, the ethos of a news brand is linked to its transparency, or congruence. These factors are separate to whether or not the brand is accurate or impartial. For example, one respondent preferred BuzzFeed to the Mail Online because:

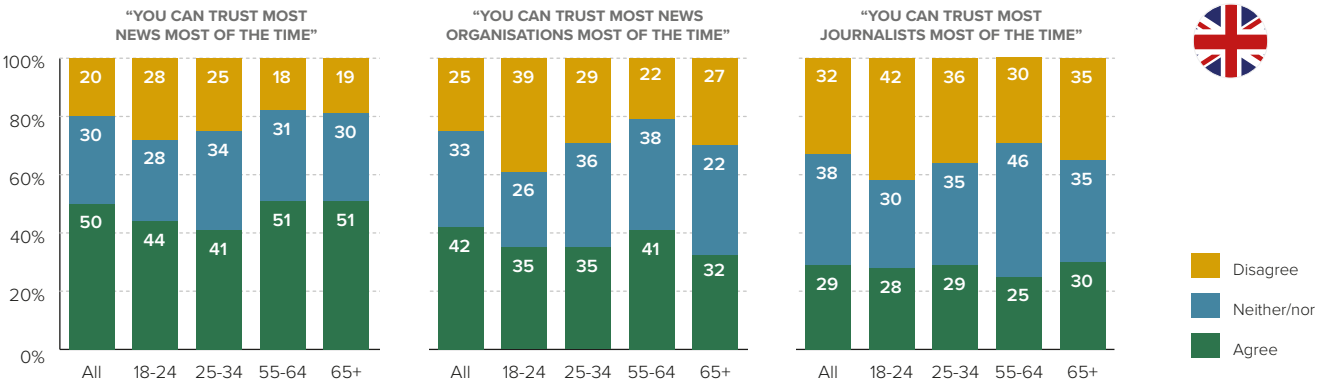
> "I think for me the difference between BuzzFeed and the Mail [is] they're both not serious. Not very credible sources. Not well written but like for me BuzzFeed knows that it's that. Whereas every time I click on the Mail I feel really guilty because I know that it's rubbish."
>
> *(20–34 Female, US Focus Group)*

This point of view implies that it is the overtness of the editorial stance that encourages trust, rather than necessarily the content of that editorial stance.

LACK OF MEDIATION IS A CORE DIMENSION OF TRUSTED NEWS

In addition to these factors, both the survey and the qualitative groups indicate that another core factor in trust is the unmediated nature of some types of news. Figure 3 sets out the UK survey responses to three different attitude statements – 'I think you can trust most news most of the time', 'I think you can trust most news organisations most of the time', and 'I think you can trust most journalists most of the time'.

FIGURE 3: LEVELS OF TRUST IN TYPES OF NEWS



Q6_2016_1/2/3. Thinking about news in general, do you agree or disagree with the following statements?: I think you can trust most news most of the time/I think you can trust most news organisations most of the time/I think you can trust most journalists most of the time. Base: Total sample/18-24s/25-34s/55-64s/65+: UK = 2024/220/206/438/467

The most general statements, about news overall, commands the highest levels of agreement, with around half of respondents agreeing and one in five disagreeing. Younger age groups are less likely to agree, and 28% of 18–24s say they disagree that news in general can be trusted (see Figure 3).

When asked about organisations, levels of agreement are somewhat lower, with around four in ten agreeing that they can mostly be trusted, decreasing to 35% for 18–24s. And when asked about journalists, only three in ten agree they can be trusted, with more people saying they disagree that they can be trusted – including 42% of 18–24s.

In other words, more mediated forms of news provision are less likely to be trusted. The benefits of unmediated news were also highlighted in the qualitative research. As one respondent said about social media:

> "I totally know what you mean whenever you say trustworthy for social media because I mean ... it's one thing one person's saying. Oh such and such has just happened in Bangladesh but then someone from Bangladesh who you can tell is there can say actually no, I'm here and this happened."
> *(20–34 Male, UK Focus Group)*

Similarly, there are some signs that images and video are seen as more unmediated than text, and therefore more trustworthy. There has been growth since 2014 in the consumption of video for online news, from 16% in 2014 to 22% in 2016, although compared to 2015 (21%) there has been no change.
In qualitative groups, respondents spoke about the value of being able to see news events unfold, or to watch a particular interviewee:

> "If they're interviewing someone you can weigh them up more. You can sort of see."
> *(20–34 Male, UK Focus Group)*

TRIANGULATION INCREASINGLY NECESSARY IN BUILDING TRUST

However, unmediated news requires triangulation with other sources, as another respondent notes:

> "Twitter can often be just a normal person on the ground. It could be a refugee. It could be someone living near Calais in France for example. And just reporting as they see it. And quite often you do have to take this with a pinch of salt. But again I can't really, unless it's from someone who you know, you can't really make an opinion out of it unless you compare it to other similar sources."
> *(20–34, Male, UK Focus Group)*

For the active news users in the qualitative groups, this triangulation, or curation, of news input was seen as an increasingly necessary activity because of the range of available sources. This could be time-consuming and lead to uncertainty about what to trust, and there was some wistfulness in the younger age-group for the printed press:

> "You read what's in front of you ... If you have a newspaper you read it, you're not drawn into you know digressing into another app to bring you to another app to another source to another, to YouTube to watch a video."
> *(20–34 Female, UK Focus Group)*

As people become more aware of inherent subjectivity of 'truth' in relation to news output, they need to assess for themselves the trustworthiness of the sources that they use. For active news users, assessment across a range of sources is providing them with a complex, nuanced, but workable topography of trust. For those with a narrower range of news sources and less interest, the landscape is more limited.

POSTSCRIPT AND FURTHER READING

POSTSCRIPT AND FURTHER READING

The authors welcome feedback on this report and suggestions on how to improve our work via reuters.institute@politics.ox.ac.uk as well as potential partnerships and support for our ongoing work.

RELEVANT SURVEYS AND REPORTS

Emily Bell, 'As Publishers Lose Control are Newspaper Websites a Dead Parrot?' http://www.theguardian.com/media/2016/feb/21/publishers-adblocking-advertising-mobile

Digital News Project Publications: http://www.digitalnewsreport.org/publications

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Ofcom, *The Communications Market Report* (Aug. 2015): http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr15

— *News Consumption in the UK 2015* (Oct. 2015): http://stakeholders.ofcom.org.uk/market-data-research/other/tv-research/news-2015

— *International Communications Market Report* (Dec. 2015): http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr15/international

Pew Research Center's Project for Excellence in Journalism, *The State of the News Media* (2016): http://stateofthemedia.org

OTHER RELEVANT PUBLICATIONS FROM THE REUTERS INSTITUTE

http://reutersinstitute.politics.ox.ac.uk/page/publications

Rodrigo Carro, 'Brazilian Newspapers: The Risk of Becoming Irrelevant' (Fellows' Research Paper, Reuters Institute for the Study of Journalism, 2016)

Federica Cherubini and Rasmus Kleis Nielsen, *Editorial Analytics: How News Media are Developing and Using Audience Data and Metrics* (Feb. 2016)

Antonis Kalogeropoulos, *The Future of Online Video* (forthcoming – June 2016)

Rasmus Kleis Nielsen and Richard Sambrook, *What is Happening to Television News?* (Apr. 2016)

Lucy Küng, *Innovation in Journalism Organisations: An International Perspective* (I. B. Tauris and RISJ, 2015)

Nic Newman, *Media Journalism and Technology Predictions* (Jan. 2016)

Annika Sehl, *Public Service News and Digital Media* (Mar. 2016)

Servet Yanatma, 'Media Capture and Advertising in Turkey: The Impact of State on News' (Fellows' Research Paper, Reuters Institute for the Study of Journalism, 2016)

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