

Reuters Institute Digital News Report 2019



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Nic Newman with Richard Fletcher, Antonis Kalogeropoulos,
and Rasmus Kleis Nielsen

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Foreword

Professor Rasmus Kleis Nielsen

Director, Reuters Institute for the Study of Journalism (RISJ)

Journalism exists in the context of its audience, and if journalists (and those who care about journalism) are to understand and navigate the changing environment around news, it is critically important that they have access to relevant, robust, independent evidence and analysis on how people across countries engage with and use news.

That is what we aim to provide in the *Reuters Institute Digital News Report*, here in its eighth annual iteration. The report provides important new insights into key issues including people's willingness to pay for news, the move to private messaging applications and groups, and how people see news media around the world performing their role.

The report is based on a survey of more than 75,000 people in 38 markets, along with additional qualitative research, which together make it the most comprehensive ongoing comparative study of news consumption in the world.

Europe remains a key focus, with 24 countries included, but we also cover seven markets in Asia (Japan, South Korea, Taiwan, Hong Kong, Malaysia, Singapore, and Australia) along with four Latin American countries (Brazil, Argentina, Chile, and Mexico) as well as the United States and Canada. We are also delighted to include South Africa for the first time this year, following on from our first stand-alone *India Digital News Report*, published earlier this year, part of our effort to make our research more truly global.

The report has expanded more than sevenfold since its creation, from five countries in 2012 to 38 this year, and as we work to make the report more fully global, we are proud to have been able to add more from the South this year. As we use online polling and need to make meaningful comparisons, we continue to focus on countries with high internet penetration and which are either broadly democratic or generally compare themselves to countries with a democratic tradition. (We have kept India separate from the main *Digital News Report* for this reason – internet use is not yet widespread enough there to make our online sample directly comparable to the countries covered here.)

This year's report comes amid a complex set of challenges for the news industry specifically and for our media environment more broadly, including the ongoing disruption of inherited business models for news, constant evolution in how people use digital media (and the ways in which we are constantly reminded of how some of the information they come across is untrustworthy and sometimes spread with malicious intent), and social upheaval associated with the rise of populism and with low trust in many institutions.

As with previous reports we shed light on the questions these developments raise through a combination of survey data, qualitative research, and intelligence from expert contributors across all of our countries. We have also looked in much more detail at the news and media habits of younger people who have grown up with digital media and products and services like Facebook and YouTube and differ in important ways from older generations. We conducted a series of in-depth interviews and tracking studies in the United Kingdom and the United States that we draw on in the relevant sections here and we will publish a full report on the topic later in the year.

A report of this scale and scope is only possible due to collaboration from our partners and sponsors around the world. We are proud to have the opportunity to work with a number of leading academics and top universities in the report, as well as media experts from the news industry itself. Our partners have helped in a variety of different ways, from preparing country profiles to in-depth analysis of the results.

Given the richness of the research, this report can only convey a small part of the data collected and work done. More detail is available on our website (www.digitalnewsreport.org), which contains slidepacks and charts, along with a licence that encourages reuse, subject to attribution to the Reuters Institute. On the website, there is also a full description of our survey methodology, the full questionnaire, and an interactive charting feature, which allows data to be compared across countries, and over time. Raw data tables are also available on request along with documentation for reuse.

Making all this possible, we are hugely grateful to our sponsors: Google, BBC News, Ofcom, the Broadcasting Authority of Ireland, the Dutch Media Authority (CvdM), 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, the Centre d'études sur les médias, Québec, Canada, and Roskilde University in Denmark. The Open Society Foundations has joined as our newest sponsor, allowing us to expand the report to cover South Africa (and has committed to supporting the inclusion of additional countries in the global south next year).

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

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 2019.

- Samples in each country were assembled using nationally representative quotas for age, gender, region, and education.¹ The data were also weighted to targets based on census/industry accepted data.
- 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 around 3%.
- We should note that online samples will tend to under-represent the consumption habits of people who are not online (typically older, less affluent, and with limited formal education). In this sense it is better to think of results as representative of online populations who use news at least once a month. In a country like Norway this is almost everyone (99%) but in South Africa this is around half (54%).
- These differences mean we need to be cautious when comparing results between countries. We have marked countries with lower internet penetration or less representative online samples with an asterisk (*) in the table below and have been careful in the report not to directly compare these countries on issues where we know that the sample difference would make results invalid (e.g. paying for news).
- It is also important to note that online surveys rely on recall, which is often imperfect or subject to biases. We have tried to mitigate these risks through careful questionnaire design and testing. On the other hand, surveys can be a good way of capturing fragmented media consumption across platforms (e.g. social media, messaging, apps, and websites), and tracking activities and changes over time.
- It is important to note that some of our survey-based results will not match industry data, which are often based on very different methodologies, such as web-tracking. The accuracy of these approaches can be very high, but they are also subject to different limitations, meaning that data can also be partial or incomplete. We will often look at this data to sense check our results or help identify potential problems with our survey data before publication. On occasions we will include industry data as supporting evidence with appropriate attribution.
- Each year we also commission some qualitative research to support and complement the survey. This year, we worked with Flamingo, an international market research company, to look in detail at the habits and behaviours of younger groups in the United States and United Kingdom. The methodology included tracking actual online behaviour of 20 participants for several weeks, in-depth interviews, and small group discussions with their friends. Insights and quotes from this research are used to support this year's *Digital News Report* but will also form a separate report to be published in September.
- 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.
- Due to a scripting error we needed to repoll respondents for one question in Norway about the use of social networks for news. 1,387 of the original 2,000 sample responded to the recontact request and the results are included on the Norway country page.
- A fuller description of the methodology, panel partners, and a discussion of non-probability sampling techniques can be found on our website along with the full questionnaire (digitalnewsreport.org)

Country	Final sample size	Internet penetration	Country	Final sample size	Internet penetration	Country	Final sample size	Internet penetration
Europe			Italy	2006	92%	Brazil*	2013	71%
UK	2023	95%	Netherlands	2026	96%	Canada	2055	90%
Austria	2010	88%	Norway	2013	99%	Chile	2004	78%
Belgium	2008	94%	Poland	2009	78%	Mexico*	2015	65%
Bulgaria*	2018	66%	Portugal	2010	78%	Asia Pacific		
Croatia	2009	91%	Romania	2004	74%	Australia	2010	88%
Czech Republic	2023	88%	Slovakia	2045	85%	Hong Kong	2056	87%
Denmark	2011	97%	Spain	2005	93%	Japan	2017	93%
Finland	2009	94%	Sweden	2007	97%	Malaysia*	2101	78%
France	2005	93%	Switzerland	2003	91%	Singapore	2033	84%
Germany	2022	96%	Turkey*	2074	68%	South Korea	2035	93%
Greece	2018	70%	Americas			Taiwan	1005	88%
Hungary	2007	89%	USA	2012	96%	Africa		
Ireland	2013	93%	Argentina	2006	93%	South Africa*	2009	54%

Source: Internet World Stats (<http://www.internetworldstats.com>). Please note that in Argentina, Brazil, Chile, Greece, Mexico, South Africa and Turkey our samples tend to be based more around urban areas, which should be taken into consideration when interpreting results. *These countries have lower internet penetration so results may not be comparable for some measures.

¹ Education quotas were not applied (or not fully applied) in Brazil, Mexico, South Africa, Malaysia, Romania, Bulgaria, Croatia, Greece, and Turkey so these samples will have a higher proportion of highly educated people than the general population.

Authorship and research acknowledgements



Professor Rasmus Kleis Nielsen is Director of the Reuters Institute for the Study of Journalism, Professor of Political Communication at the University of Oxford, and served as Editor-in-Chief of the *International Journal of Press/Politics* from 2015 to 2018. His work focuses on changes in the news media, political communication, and the role of digital technologies in both.



Nic Newman is Senior Research Associate at the Reuters Institute for the Study of Journalism and is also a consultant on digital media, working actively with news companies on product, audience, and business strategies for digital transition. He also writes an annual report for the Institute on future media and technology trends.



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, the use of social media by journalists and news organisations, and more broadly, the relationship between computer-based technologies and journalism.



Dr Antonis Kalogeropoulos is a Research Fellow at the Reuters Institute for the Study of Journalism. His doctoral work was focused on the effects of exposure to economic news. His research interests include political communication, journalism, and audience research.

Country-level commentary and additional insight around media developments have been provided by academic partners and by our network of Reuters Journalist Fellows around the world.² Authorship is referenced at the bottom of the respective country page in Section 3.

Additional expert analysis and interpretation of the survey data were provided by Anne Schulz at the Reuters Institute, and by the team at YouGov, in particular Charlotte Clifford, Justin Marshall, Sloane Francis Grant, Lucie Larboulette, David Eastbury, Stephanie Frost, and Anna Wilson.

² Reuters 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.



Section 1

Executive Summary and Key Findings

Nic Newman
Senior Research Associate,
Reuters Institute for the Study of Journalism

This year's report comes against the backdrop of rising populism, political and economic instability, along with intensifying concerns about giant tech companies and their impact on society. News organisations have taken the lead in reporting these trends, but also find themselves challenged by them – further depressing an industry reeling from more than a decade of digital disruption. Platform power – and the ruthless efficiency of their advertising operations – has undermined news business models contributing to a series of high-profile layoffs in traditional (Gannett) and digital media (Mic, BuzzFeed) in the early part of 2019. Political polarisation has encouraged the growth of partisan agendas online, which together with clickbait and various forms of misinformation is helping to further undermine trust in media – raising new questions about how to deliver balanced and fair reporting in the digital age.

Against this background we are seeing some real shifts of focus. News organisations are increasingly looking to subscription and membership or other forms of reader contribution to pay the bills in a so-called 'pivot to paid'. Platforms are rethinking their responsibilities in the face of events (Christchurch attacks, Molly Russell suicide) and regulatory threats, with Facebook rebalancing its business towards messaging apps and groups – the so-called 'pivot to private'. Meanwhile audiences continue to embrace on-demand formats with new excitement around podcasts (*New York Times*, *Guardian*) and voice technologies – the so-called 'pivot to audio'.

And amid all this frenetic change, some are beginning to question whether the news media are still fulfilling their basic mission of holding powerful people to account and helping audiences understand the world around them. The questioning comes in the form of government inquiries in some countries into the future sustainability of quality journalism (with recommendations as to what can be done to support it). But it also comes from parts of the public who feel that the news media often fall short of what people expect from them.

Our report this year, based on data from almost 40 countries and six continents, aims to cast light on these key issues, principally through our survey data but supplemented with in-depth qualitative research on the news habits of young people in the UK and US. The overall story is captured in this Executive Summary, followed by Section 2 with chapters containing additional analysis on key themes and then individual country pages in Section 3 carrying additional context provided by local experts in each market.

A SUMMARY OF SOME OF THE MOST IMPORTANT FINDINGS FROM OUR 2019 RESEARCH.

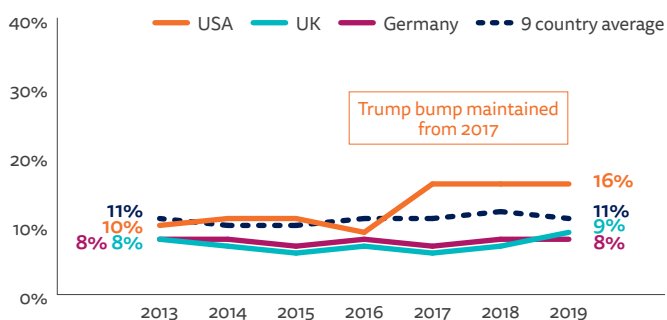
- Despite the efforts of the news industry, we find only a small increase in the numbers paying for *any* online news – whether by subscription, membership, or donation. Growth is limited to a handful of countries mainly in the Nordic region (Norway 34%, Sweden 27%) while the number paying in the US (16%) remains stable after a big jump in 2017.
- Even in countries with higher levels of payment, the vast majority only have ONE online subscription – suggesting that 'winner takes all' dynamics are likely to be important. One encouraging development though is that most payments are now 'ongoing', rather than one-offs.
- In some countries, subscription fatigue may also be setting in, with the majority preferring to spend their limited budget on entertainment (Netflix/Spotify) rather than news. With many seeing news as a 'chore', publishers may struggle to substantially increase the market for high-priced 'single title' subscriptions. As more publishers launch pay models, over two-thirds (70%) of our sample in Norway and half (50%) in the United States now come across one or more barriers each week when trying to read online news.
- In many countries, people are spending less time with Facebook and more time with WhatsApp and Instagram than this time last year. Few users are abandoning Facebook entirely, though, and it remains by far the most important social network for news.
- Social communication around news is becoming more private as messaging apps continue to grow everywhere. WhatsApp has become a primary network for discussing and sharing news in non-Western countries like Brazil (53%) Malaysia (50%), and South Africa (49%).
- People in these countries are also far more likely than in the West to be part of large WhatsApp groups with *people they don't know* – a trend that reflects how messaging applications can be used to easily share information at scale, potentially encouraging the spread of misinformation. Public and private Facebook Groups discussing news and politics have become popular in Turkey (29%) and Brazil (22%) but are much less used in Western countries such as Canada (7%) or Australia (7%).
- Concern about misinformation and disinformation remains high despite efforts by platforms and publishers to build public confidence. In Brazil 85% agree with a statement that they are worried about what is real and fake on the internet. Concern is also high in the UK (70%) and US (67%), but much lower in Germany (38%) and the Netherlands (31%).
- Across all countries, the average level of trust in the news in general is down 2 percentage points to 42% and less than half (49%) agree that they trust the news media *they themselves use*. Trust levels in France have fallen to just 24% (-11) in the last year as the media have come under attack over their coverage of the Yellow Vests movement. Trust in the news found via search (33%) and social media remains stable but extremely low (23%).

- Worries about the quality of information may be good for trusted news brands. Across countries over a quarter (26%) say they have started relying on more 'reputable' sources of news – rising to 40% in the US. A further quarter (24%) said they had stopped using sources that had a dubious reputation in the last year. But the often low trust in news overall, and in many individual brands, underlines this is not a development that will help all in the industry.
- The news media are seen as doing a better job at breaking news than explaining it. Across countries, almost two-thirds feel the media are good at keeping people up to date (62%), but are less good at helping them understand the news (51%). Less than half (42%) think the media do a good job in holding rich and powerful people to account – and this figure is much lower in South Korea (21%), Hungary (20%), and Japan (17%).
- There are also significant differences *within* countries, as people with higher levels of formal education are more likely to evaluate the news media positively along every dimension than the rest of the population, suggesting that the news agenda is more geared towards the interests and needs of the more educated.
- To understand the rise of populism and its consequences for news and media use, we have used two questions to identify people with populist attitudes, and compared their news and media use with those of non-populists. People with populist attitudes are more likely to identify television as their main source of news, more likely to rely on Facebook for online news, and less likely to trust the news media overall.
- More people say they actively avoid the news (32%) than when we last asked this question two years ago. Avoidance is up 3 percentage points overall and 11 points in the UK, driven by boredom, anger, or sadness over Brexit. People say they avoid the news because it has a negative effect on their mood (58%) or because they feel powerless to change events.
- The smartphone continues to grow in importance for news, with two-thirds (66%) now using the device to access news weekly (+4pp). Mobile news aggregators like Apple News and Upday are becoming a more significant force. Apple News in the United States now reaches more iPhone users (27%) than the *Washington Post* (23%).
- The growth of the smartphone has also been driving the popularity of podcasts, especially with the young. More than a third of our combined sample (36%) say they have consumed at least one podcast over the last month but this rises to half (50%) for those under 35. The mobile phone is the most used device (55%) for podcast listening.
- Voice-activated smart speakers like the Amazon Echo and Google Home continue to grow rapidly. Usage for any purpose has risen from 9% to 12% in the United States, from 7% to 14% in the UK, from 5% to 11% in Canada, and from 4% to 8% in Australia. Despite this, we find that usage for news remains low in all markets.

SOME GROWTH LEFT BUT THE LIMITS AROUND 'SINGLE PUBLICATION' NEWS SUBSCRIPTION BECOME CLEAR

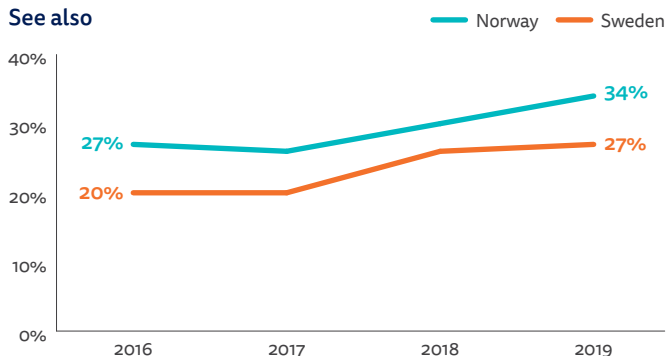
In the last year a number of publishers have added paywalls and membership schemes while others have reported significant increases in digital subscription, but our data suggest this has not yet had a substantial impact. We see a slight increase in online payment in some countries and a stable picture in the US (after a big jump in 2017) but in general we have seen little change in the last six years. The proportion paying for news (subscriptions, memberships, donations, and other one-off payments) has remained stable at 11% in nine countries (averaged) that we have been following since 2013. Most people are not prepared to pay for online news today and on current trends look unlikely to pay in the future, at least for the kind of news they currently access for free.

PROPORTION THAT PAID FOR ANY ONLINE NEWS IN THE LAST YEAR (2013-19) – SELECTED COUNTRIES



Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? Base: Total 2013-19 sample in each country = 2000, Finland 2014-15 = 1500. Note: 9 country average includes US, UK, France, Spain, Italy, Germany, Denmark, Japan, and Finland (from 2014 onwards).

See also



Norway 34% (+4)	Australia 14%	Spain 10%
Sweden 27% (+1)	Ireland 12%	Austria 9%
Finland 16% (-2)	Netherlands 11%	Canada 9%
Denmark 15% (-)	Switzerland 11%	Japan 7%

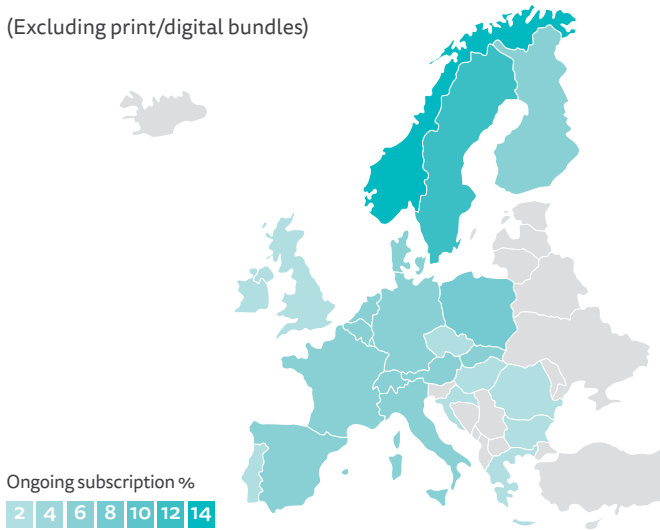
With the exception of the United States, the biggest growth has taken place in two markets, Norway and Sweden, where a small number of media houses have a strong position. Schibsted, as one example, reaches around 80% of consumers in both countries³ and, since 2016, has focused many of its quality and tabloid brands on premium, metered, and hybrid subscription models.

³ <https://schibsted.com/news/schibsted-will-be-divided-into-two-companies/>

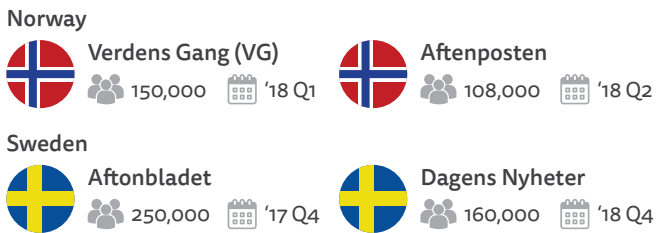
This Nordic success story becomes even clearer when we look at *digital-only subscribers*, removing those who get digital access with a print subscription or those who have a subscription that is paid by someone else. Here we find 15% in Norway and 14% in Sweden, 6% in Finland and Denmark, but just 4% in the UK and 3% in Spain and Italy. The equivalent figure in the United States is 8%. This is a purer measure of those who are prepared to use their own money to pay for a single title online news subscription. On top of the raw numbers, industry data reveal that Norwegians and Swedes are prepared to pay online for tabloid titles *VG* and *Aftenbladet* (freemium models) as well as more upmarket titles such as *AftenPosten* and *Dagens Nyheter*.

PROPORTION OF DIGITAL-ONLY SUBSCRIBERS – SELECTED MARKETS

(Excluding print/digital bundles)



DIGITAL SUBSCRIPTIONS/REPORTING PERIOD

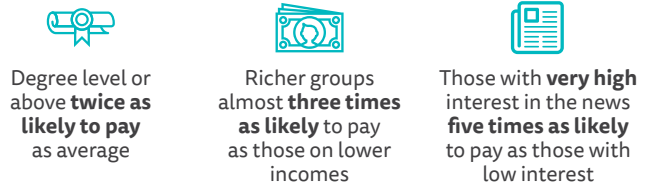


Q7ai. Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? Base: Total sample in each country = 2000. Digital Subscriptions data via FIPP 2019 Global Subscription Report⁴. Dagens Nyheter via direct communication.

By contrast, in the United States, the main subscription focus has been at the quality end of the market. The *New York Times* now has over 3m digital subscribers (out of a total of 4 million) and the *Washington Post* around 1m. Overall, almost one in ten (8%) of our US sample are digital-only subscribers (up from 3% in 2016). Global brands like the *Wall Street Journal* and *Financial Times* have also clocked impressive numbers. The *FT* recently passed 1m total subscribers – around 740,000 of whom are digital-only.

PROFILE OF DIGITAL-ONLY NEWS SUBSCRIBERS – USA

WHO PAYS IN THE UNITED STATES?



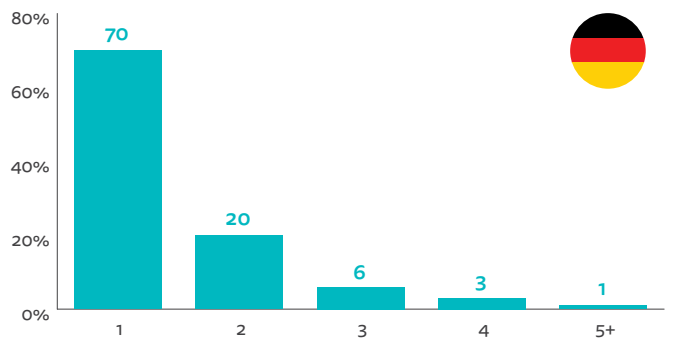
DIGITAL ONLY SUBSCRIPTIONS/REPORTING PERIOD



Q7ai. Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? Base: Total sample: USA = 2012. *Washington Post approx. figures.

But these big brand successes are not replicated across the US market. A recent Business Insider survey showed the *New York Times* and *Washington Post* together attracting more than half of all of US news subscribers,⁵ while our data show few people are currently prepared to pay for more than one online news subscription. In Germany, for example, 70% of those that pay have just one subscription. Only 10% are prepared to pay for three or more (see chart below). This means that though big national brands like *Bild* (423,000 digital subscribers) and *Zeit* (105,000) are having some success in charging for online news it may be hard to persuade people to pay for another national or local paper. This may help explain why very few local or regional publishers report success with digital subscription models – outside of the Nordic countries, France (*Ouest-France* and *Nice-Matin*), and some major cities in the US.

NUMBER OF NEWS ORGANISATIONS THAT PEOPLE PAID MONEY TO IN THE LAST YEAR – GERMANY



Q7. SUBS. You say you have paid a subscription or made an on-going donation to a digital news service in the last year. How many different news providers do you regularly pay money to? Base: All who paid for online news in the last year. Germany = 119.

The US and Nordic countries have shown the potential for considerable growth in paid content, but these are rich countries where news has historically had a high reputation and value – something that may not be replicable elsewhere. The dominance of a few big national and global brands suggests that others may need to look at alternative models or at least ones where subscription is just part of a more diversified revenue strategy.

⁴ <https://www.fipp.com/news/insightnews/publishers-double-down-paywall-content-digital-subscriptions-revenue>

⁵ Business Insider online poll conducted by Dynata, Feb. 2019 <https://www.businessinsider.com/only-a-few-publishers-will-be-able-to-sell-subscriptions-at-scale-2019-3>

NEWS NOW COMPETES WITH OTHER 'MORE ATTRACTIVE' MEDIA BUNDLES

At the same time as news publishers are asking for online payments and memberships, entertainment providers such as Netflix, Spotify, Apple Music, and Amazon Prime are generating billions of dollars via premium services. Netflix alone has around 150m subscribers including 60m in the United States. But might the growth of these services – along with sport, online gaming, dating, and media storage – mean that there will be less appetite to pay for news? While the 'culture of free' that many associate with the internet is clearly evolving, some worry about the impact of so-called subscription fatigue – the notion that people are becoming frustrated with being asked to pay separately for many different services online. In the light of these concerns, we asked people what online media subscription they would pick if they could *only have one* for the next 12 months. Not surprisingly, news comes low down the list when compared with other services such as Netflix and Spotify – especially for the younger half of the population.

PROPORTION OF UNDER 45s THAT WOULD PICK EACH IF THEY COULD ONLY HAVE ONE ONLINE MEDIA SUBSCRIPTION FOR THE NEXT YEAR – SELECTED MARKETS



37%
Online Video
(e.g. Netflix, Amazon Prime)



15%
Online Music
(e.g. Spotify, Apple Music)



7%
Online News
(e.g. New York Times, Le Monde)

Q VALUE_2019_A. If you could only have one for the next 12 months, which one of the following would you choose? Base: Under 45s: selected countries = 13,427. Note: This question was asked in 14 countries: US, UK, France, Italy, Spain, Ireland, Norway, Sweden, Finland, Belgium, Netherlands, Switzerland, Austria, Japan, Australia, and Canada.

Encouragingly, news fared considerably better with older groups (15%), but still lagged behind online entertainment services (30%). In previous years we have shown that young people are comfortable paying for online services, but news is not valued as much and is often seen as difficult or even a chore by comparison.

"It's probably awful but it's an entertainment aspect. [People] are paying for a service that is giving them entertainment."

Amy, UK, in-depth interview 2019

For further analysis see section 2.1: *Paying for News and the Limits of Subscription*

GROWING FRICTION AROUND NEWS CONSUMPTION

Meanwhile we find evidence that the significant expansion of paywalls may be affecting user experience: 70% in Norway and around half in the USA, Denmark, Australia, and the Netherlands say they see payment barriers at least weekly. Heavy news users, digital subscribers, and younger users are even more likely to see these barriers.

PROPORTION THAT SEE A NEWS PAYWALL EACH WEEK – NORWAY AND USA



70%

hit one or more paywalls each week when reading news



50%

hit one or more paywalls each week when reading news

Q7_SUBS3. How often do you click on a link, expecting to read an article, and find yourself asked to pay for a subscription instead? Base: Total sample: Norway = 2013, USA = 2012.

The fear is that increased friction could put people off news entirely, especially those who are already under-engaged. On the other hand, it is possible that this is part of a transition in which more people accept that quality news provision needs to be paid for. In open-ended comments, we find some people accepting, some irritated, with others worried about the implications for democracy.

"[Paywalls are] an understandable way to raise revenue in the face of decreasing ad revenue but I prefer the Guardian model, which doesn't limit access to just those who can afford it."

Female, 43, UK

"The majority of the population probably cannot and will not be able to afford to pay for good reporting services. This is a major issue for democracy worldwide."

Male, 34, UK

FURTHER BUNDLING AHEAD?

Our research suggests there may be a disconnect between current publisher strategies of selling individual titles (for a relatively high price) and consumer desire for frictionless access to multiple brands. Almost half of those who are interested in news (49%) consume more than four different online sources each week – a number that rises significantly for under 35s.

Donation models, such as the one operated by the *Guardian* newspaper – and some local news organisations in the United States – have been suggested as an alternative to paywalls, but these still make up a small percentage of the market. In the last year just 3% in the United States gave money to a news organisation, 2% in Spain, and 1% in the UK.

Another alternative could be bundling and aggregation. *The Times* of London offers free access to the *Wall Street Journal* while the *Washington Post* bundles cheaper access via Amazon Prime. The *New York Times* is offering a joint subscription with Scribd while *Dagens Nyheter* in Sweden is partnering with Bookbeat around audio and ebooks.⁶ These added-value bundles may become more important as markets get saturated and customer retention becomes a burning issue. Growth is harder to come by in the United States, with 40% of new subscribers at the *New York Times* now joining up for cooking and crosswords – a different kind of bundling.⁷

⁶ <https://thenewpublishingstandard.com/scribd-nyt-subscription-deal-swedens-bookbeat-ties-bundled-deal-dagens-nyheter-storytels-rivals-challenges-ahead/>

⁷ <https://www.recode.net/2018/8/9/17671000/new-york-times-trump-subscribers-news-slower-growth>

Waiting in the wings come platform aggregators such as Apple News+, offering a single priced subscription for multiple premium titles for \$9.99. Most premium news publishers have stayed out for now for risk of cannibalising their markets, but the industry will need to address consumer concerns about accessing multiple brands at a reasonable price sooner rather than later.

FRUSTRATION OVER PAYWALLS COULD PUSH CONSUMERS INTO THE ARMS OF AGGREGATORS



Note. Apple News+ brings content from 300+ newspapers and magazines into a single experience (US and Canada only) – includes some Wall Street Journal and Los Angeles Times content

GATEWAYS TO NEWS AND THE RISE OF AGGREGATION

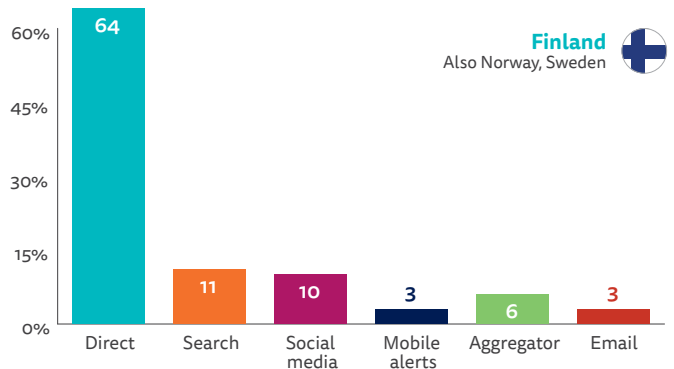
One of the biggest implications of the shift to online news has been the weakening of the direct relationship between readers and publishers. Across all our countries, just 29% now say they prefer to access a website or app directly – down 3 percentage points on a year ago. Over half of our combined sample (55%) prefer to access news through search engines, social media, or news aggregators, where large tech companies typically deploy algorithms rather than editors to select and rank stories.

Behind the averages, however, we find very significant country differences and can identify *four types of access model*. The first can be characterised as *mainly direct*, typified by Finland where almost two-thirds of respondents (64%) prefer to go first to a website or app. Elsewhere, preferred access is often *social first*, with over four in ten (42%) preferring this route in Chile and many other Latin American markets. In parts of Asia, publishers are *deeply aggregated*. In South Korea half (48%) say they prefer news via a search portal like Naver or Daum, and 27% via a news aggregator. Just 4% prefer to go directly to a news website or app, by far the lowest in our survey. Finally, we see examples like the United States where many different routes to content are important – a *pick and mix model*. In all cases, younger groups are more likely to use social media and aggregators, with older groups more likely to access directly – so these models only go some way to explaining the complexity of access and distribution. When we look beyond main access routes most consumers, of course, are using a combination of these methods on a regular basis.

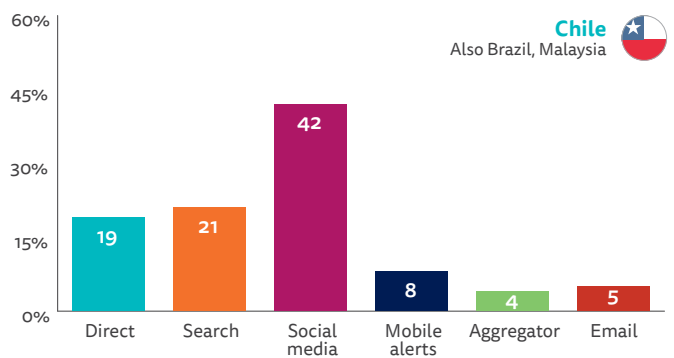
There are many reasons for these differences, which may relate to market size, competition, culture, and regulation, but either way it will clearly be harder for publishers who do not own the primary relationship with consumers to extract as much value from their content as those that do.

FOUR MODELS OF ONLINE ACCESS – SELECTED MARKETS

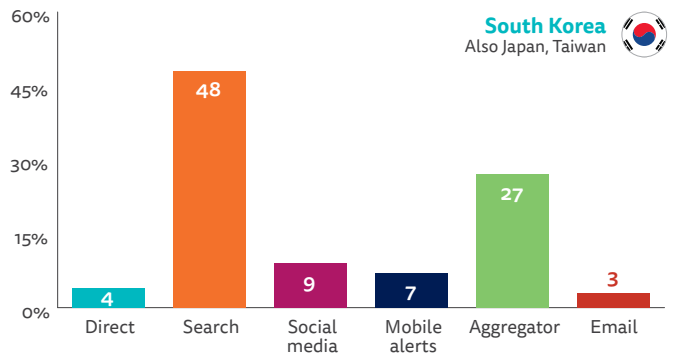
1. MAINLY DIRECT



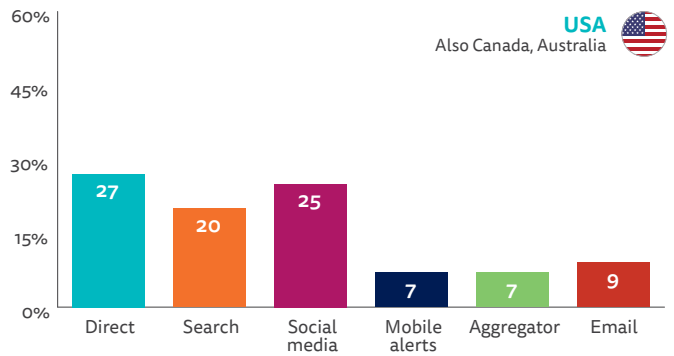
2. SOCIAL FIRST



3. DEEPLY AGGREGATED



4. PICK AND MIX



Q10a. Which of these was the MAIN way in which you came across news in the last week? Base: All that used a news gateway in the last week: Finland = 1809, Chile = 1901, South Korea = 1927, USA = 1763.

To test this hypothesis we have plotted digital-only subscription rates across countries with the proportion that access news sites and apps directly in the next chart. Here we see a clear link between direct preferences and online news payment.

There are a few exceptions though, with the USA achieving higher online subscriptions despite lower direct traffic, partly because Donald Trump's election sparked a wave of subscriptions and donations to liberal publications such as the *New York Times*.⁸

RELATIONSHIP BETWEEN PREFERENCE FOR DIRECT NEWS ACCESS AND DIGITAL NEWS SUBSCRIPTIONS – SELECTED MARKETS



It is important to note that other factors will be at play and we find that the biggest drivers of direct traffic (and subscription) are interest in news and education.

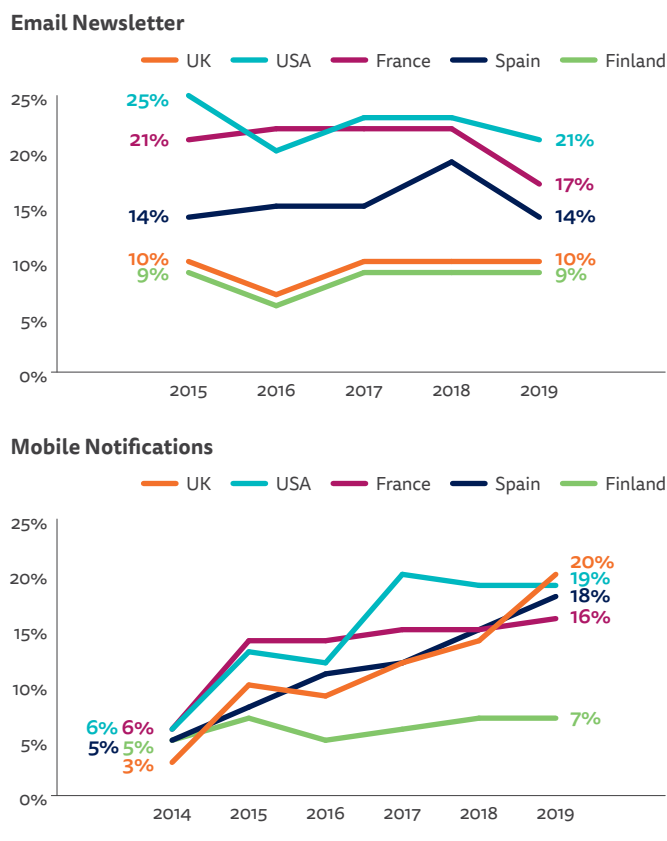
THE ROLE OF EMAIL AND MOBILE NOTIFICATIONS IN DRIVING LOYALTY

Generating more direct traffic to websites and apps is an important priority for publishers, with email newsletters a particularly favoured tactic for retaining subscribers but also for attracting new users. The *Washington Post* operates around 70 different newsletters and has found that recipients consume around three times as much content as those who don't use email news. Our own data this year show that 42% of US digital subscribers have used one or more email newsletters in the last week compared with 35% in the UK but just 17% in Norway and 19% in Sweden. It is clear this is one area where Nordic publishers could learn a few tricks from the United States.

Email remains extremely effective with older, highly engaged news users, even if overall usage has not grown over the last five years. By contrast, mobile notifications tend to be used by younger groups and have shown considerable growth in weekly use – up from 3% to 20% in the UK and 6% to 19% in the United States since 2014.

Heavy news users are 2.5 times more likely to use mobile alerts than casual news users. Publishers are learning how to use alerts more strategically⁹ – and not just for breaking news. Different content is now selected for different day-parts and also at weekends, while readers are being targeted individually with relevant content driven by artificial intelligence algorithms.

PROPORTION THAT USED A NEWSLETTER/MOBILE ALERT IN THE LAST WEEK (2014-19) – SELECTED COUNTRIES



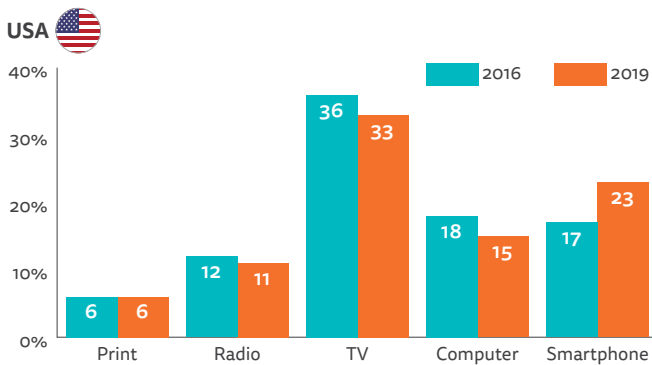
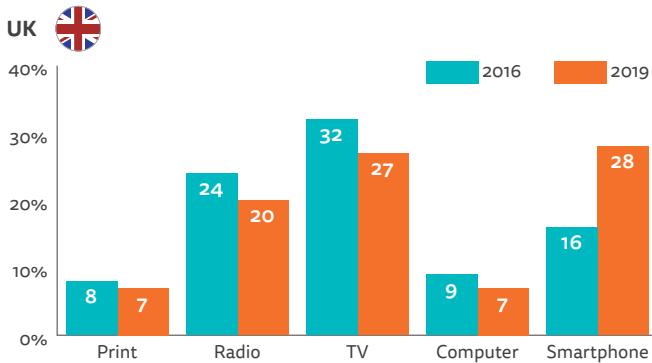
Q10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? Base: All in 2014-19 that used a news gateway in the last week in each country = 1750.

⁸ <https://www.recode.net/2018/8/9/17671000/new-york-times-trump-subscribers-news-slower-growth>
⁹ Tow Center report on mobile alerts, Dec. 2018: https://www.cjr.org/tow_center_reports/newsrooms-view-mobile-alerts-as-standalone-platform.php

FIRST CONTACT WITH THE NEWS; SHIFTING PREFERENCES OVER TIME

This year we've taken a fresh look at the importance of gateways by bringing back a question about 'first news use' from 2016. In both the US and the UK we see fewer people starting each day with radio, TV, or print, with more people using the internet – mainly via smartphones. In the UK, the smartphone is now the main first gateway to news (28%) overtaking TV (27%).

PROPORTION THAT USED EACH FOR FIRST CONTACT WITH NEWS (2016 AND 2019) – UK AND USA



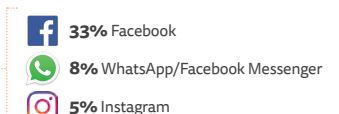
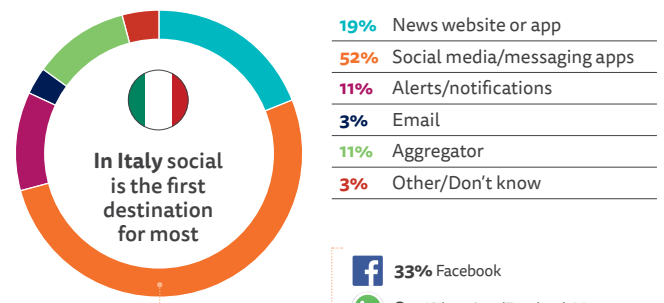
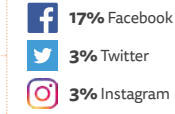
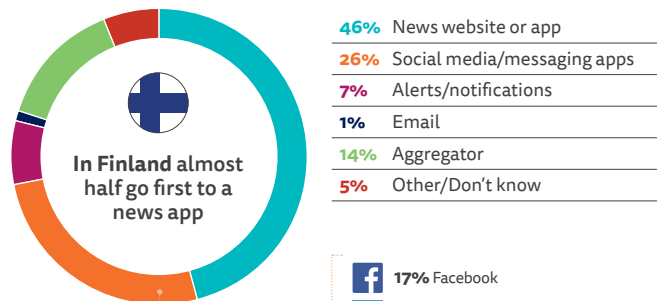
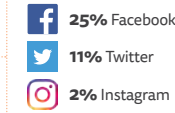
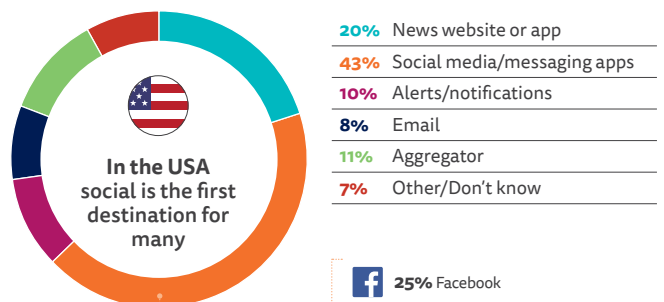
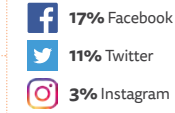
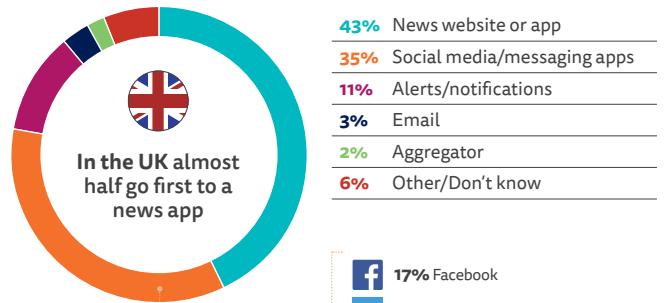
Q9c_new2016. What is the FIRST way you typically come across news in the morning?
Base: Total 2016/2019 in each country = 2000.

WHERE DO PEOPLE PICK UP FIRST NEWS ON A SMARTPHONE?

Around four in ten (43%) in the UK say they go to a news website or app first when using a smartphone, a relatively high figure almost certainly driven by the popularity of the BBC News app. The situation is reversed for under 35s with almost half starting their journey with social media (44%) and just a third going direct (34%). Overall, the proportion going direct is down 5 points from 48% in 2016 due to more going via homescreen links (11%) and aggregators.

In the United States, only one in five (20%) goes straight to a news app, down from 23% in 2016. Amongst under-35s only 13% go direct, with over half (54%) preferring to go to social media. Having said that, overall first contact via social media (43%) has fallen six points while the use of aggregators (11%) and alerts/notifications (10%) has grown. The mix of social networks has also shifted since 2016 with less use of Facebook and more of Twitter and Instagram. The pattern in Finland is similar to the UK, with Italy more like the United States, except that much of the social first use is for messaging apps like WhatsApp (8%).

PROPORTION OF SMARTPHONE-FIRST USERS THAT USED EACH FOR FIRST CONTACT WITH NEWS – SELECTED MARKETS

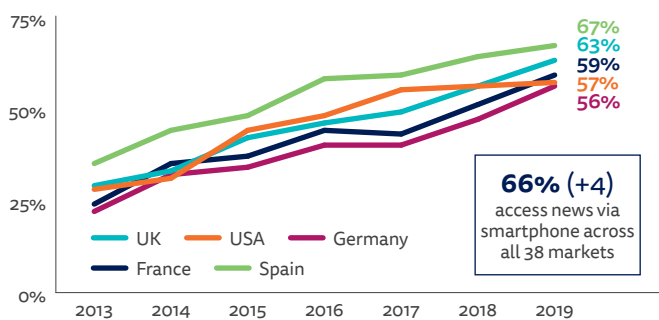


Q9d_2016_rc5. You mentioned that your FIRST contact with news in the morning is using internet via smartphone, in which ONE of the following places do you typically find your first news? Base: All that said their first contact with news is via a smartphone: UK = 516, USA = 460, Finland = 539, Italy = 480.

SMARTPHONES GROW FURTHER; RISE OF MOBILE AGGREGATORS

Smartphone sales may be slowing down but the previous section shows how our dependence on them for news continues to grow. Two-thirds of our combined sample (66%) now uses the smartphone for news weekly, with usage doubling in most countries over the last seven years.

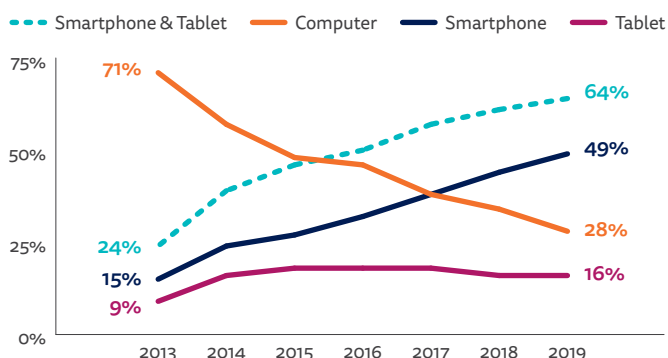
PROPORTION THAT USED A SMARTPHONE FOR NEWS IN THE LAST WEEK (2013-19) – SELECTED MARKETS



Q8B. Which, if any, of the following devices have you used to access news in the last week? Base: Total sample 2013-19 sample in each country = 2000.

People are still using computers and tablets for news but when we ask about preferred device the convenience and versatility of the smartphone tends to win out. In the UK the smartphone overtook the computer in 2017 and together with the tablet is now preferred by twice as many people. Tablet usage is stable, with a small group of older and richer users (16%) continuing to prefer accessing news via larger screens.

MAIN DEVICE FOR NEWS (2013-19) – UK



UK8b6_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 2013-19 that used a device for news in the last week: UK = 1750.

These trends matter for three reasons. First, it has become harder to make display advertising work on smaller screens and this is contributing to the financial difficulties for publishers. Second, content formats designed for the print/desktop era are becoming increasingly outdated on mobile displays, and third, personally addressable devices enable targeted content and experiences – putting a greater premium on those with access to more content and more data (primarily platform companies).

MOBILE AGGREGATORS OFFER NEW OPPORTUNITIES, BUT WITH STRINGS ATTACHED

Against this background we are seeing a significant, if relatively modest, shift towards mobile news aggregators. Google News relaunched last year with a new design and greater focus on AI-driven recommendations, while mobile manufacturers running the Android operating system are integrating news aggregators like Upday, News Republic, and Flipboard into the core operating system, partly as a response to the success of Apple News.

PROPORTION THAT USED EACH NEWS AGGREGATOR IN THE LAST WEEK (2017 AND 2019) – SELECTED REGIONS

Service	North America	EU	Asia	Latin America	South Africa*
Google News	17% (+4)	17% (+7)	28% (+7)	41% (+20)	38%
Apple News	8% (+1)	5% (+1)	10% (-)	5% (-1)	n/a
Upday	3% (+1)	4% (+2)	5% (-)	5% (+2)	10%
Flipboard	4% (-1)	2% (-)	4% (-1)	3% (-)	7%

Q10c_2016. 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 2017/2019 sample in each region: North America = 4269/4067, EU = 40,312/42,288, Asia = 11,142/11,247, Latin America = 8012/8038, *South Africa = 2009, no comparative figures for 2017. Note: EU sample in 2017 does not include Bulgaria.

It is hard to capture these trends accurately in a survey because respondents often see these as 'news links on their phone' rather than a distinct destination, but our qualitative research is giving us a clearer picture of the role these services play in news repertoires. Younger groups in particular love the convenience, the lack of friction, and the way it brings multiple brands into one place. We find some users actively curating and configuring the news that is most relevant to them but most are using them in a more incidental or passive way.

"It's just the one that comes with my phone. You get a notification on this bar here. Sometimes you find yourself on a website that you wouldn't normally like to go on."

Chloe, 31-35, UK in-depth interview

"I like using Apple News because it consolidates everything into one place and you don't see five articles about the same thing."

Maggie, 21-24, US in-depth interview

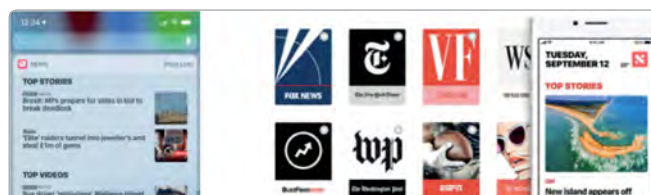
For further analysis see section 2.5: How Younger Generations Consume News Differently

Quick Fix:

Swipe left for news

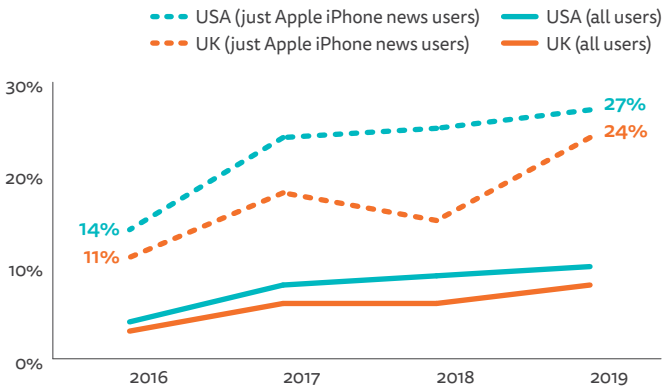
Active Mode:

Immersive, multiple options



Google News reaches 15% of our US sample, which is a similar level of weekly usage to the *Washington Post*. Reach for Apple News overall is just 10% but among *iPhone* users specifically, the news service now has higher reach (27%) than most US news websites. In the UK, a quarter of Apple smartphone users (24%) access news this way, which puts the service a clear second behind BBC News amongst this group.

PROPORTION THAT USED APPLE NEWS IN THE LAST WEEK, 2016-19 – USA AND UK



Q10c_2016. 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 2016-2019 sample/
iPhone users: USA = 2000/500, UK = 2000/500.

It is important to distinguish between Upday, Google News, and Flipboard which pass traffic directly to publishers, and others like Apple News, and Yahoo! News which are trying to become destinations in their own right, republishing full stories in return for a share of advertising or subscription revenues. Mobile aggregators can bring reach and attention but with the latter category many publishers will be wary about the loss of control, the weakening of brand attribution, and lower revenue – with some platforms looking to take a cut of up to 50%.

It should be noted that mobile aggregation is already *majority behaviour* in many Asian countries. Yahoo! News reaches two-thirds (66%) of smartphone users in Japan each week, Naver reaches 73% of smartphone users in South Korea, while Line Today reaches 47% of our Taiwanese sample. Local mobile aggregators are also a force in Italy (Giornali, 17%), Norway (Startsiden, 18%), and Sweden (Omni 12%).¹⁰

SOCIAL MEDIA AND THE MOVE TO MESSAGING

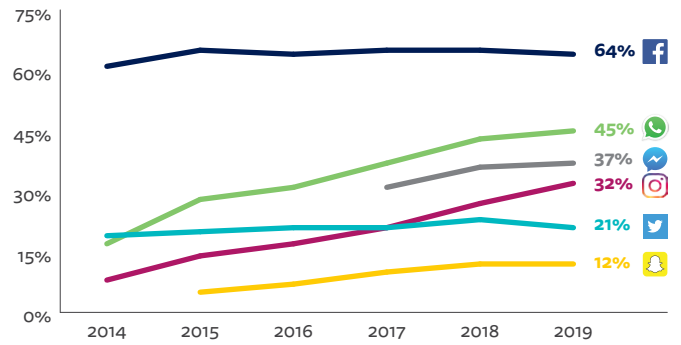
It has been a dramatic year for social media with Facebook and YouTube under fire for spreading misinformation, encouraging hate speech and online harm – as well as playing fast and loose with our privacy.

Facebook’s response to these issues has already impacted news publishers through a series of algorithm changes, but the next step could be even more disruptive. In February, Mark Zuckerberg announced a shift of focus to more private messaging and has said that he expects WhatsApp and Facebook Messenger to be the main way that users interact across the Facebook network. This means that the sharing of news and comment in the future will be less open and less transparent.

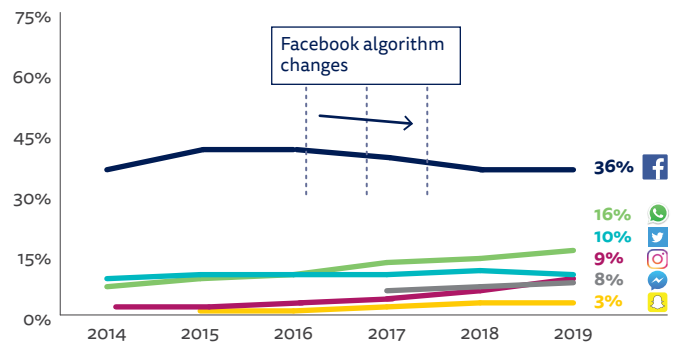
The chart below, which averages data from twelve countries we have been tracking since 2014, shows the rapid growth for WhatsApp, Facebook Messenger, and newer networks like Instagram and Snapchat, which also incorporate private features like ephemeral messaging. By contrast reach for Facebook and Twitter has been flat. As more people use messaging services, news usage has also risen, while the relative importance of Facebook itself has declined.

SOCIAL MEDIA AND MESSAGING (2014-19) – SELECTED MARKETS

WEEKLY USE FOR ANY PURPOSE



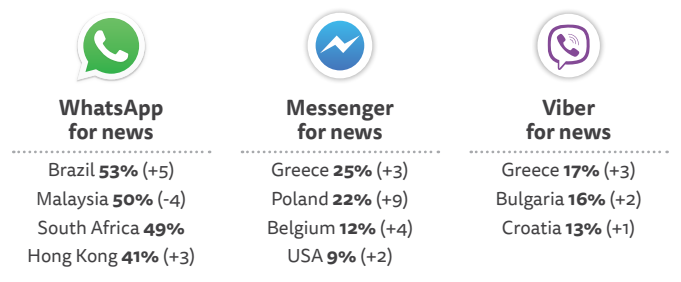
WEEKLY USE FOR NEWS



Q12a/b. Which, if any, of the following have you used for any purpose/for news in the last week? Base: Total 2014-19 sample in each country: 18,859/23,557/24,814/24,487/24,735/24,146. Note: From 2015-19 the 12 countries included are UK, US, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia and Brazil. In 2014, we did not poll in Australia or Ireland.

It should be noted that Facebook as a company remains in a strong position. As owner of Instagram, Messenger, and WhatsApp its products reach 84% of our combined sample and 57% for news. Messaging apps, which also include Viber, Telegram, and WeChat, reach 75% for any purpose across our sample and 31% for news – up 8 percentage points from two years ago.

PROPORTION THAT USE EACH MESSAGING APP FOR NEWS – SELECTED MARKETS



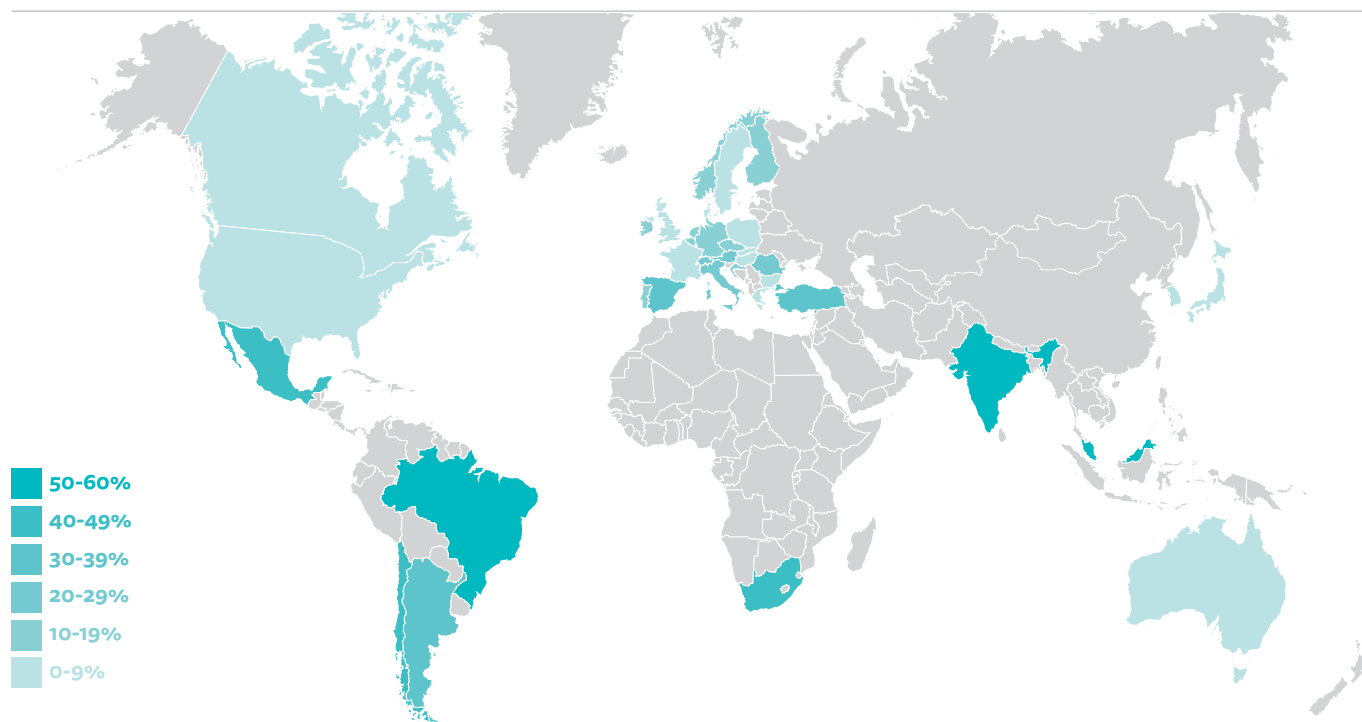
Q12b. Which, if any, of the following have you used for news in the last week? Base: Total sample in each market = 2000.

¹⁰ Omni is owned by the publisher Schibsted.

This explosive growth of WhatsApp has so far been concentrated in Latin America, South East Asia, Africa, and Southern Europe as well as in India, which we covered in a recent Reuters Institute stand-alone report focused on English speakers.¹¹ Around half of

our Brazilian (53%) and Malaysian (50%) samples use WhatsApp for news, compared with 9% in the UK, 6% in Australia, and just 4% in both the United States and Canada.

PROPORTION THAT USE WHATSAPP FOR NEWS – SELECTED MARKETS



Q12b. Which, if any, of the following have you used for news in the last week? Base: Total sample in each market = 2000, Taiwan = 1005. Note: India poll conducted in Jan 2019 with English-speaking, online news users in India – a small (but important) subset of a larger, more diverse, and very complex Indian media market.

The data and chart above capture just those countries covered in this report and India, but other publicly available data confirm that WhatsApp use is more prevalent in the global south, countries where reliable information is often in short supply and public institutions are more fragile.

The spread of unfounded rumours has led to a spate of killings in India while our country page reports from Brazil and South Africa illustrate how politicians have used the network to spread negative stories about opponents in a way that would be harder in open networks. Fact-checking organisations have set up 'tip lines', appealing to the public to flag illegal or dangerous content. In Brazil, roughly a million WhatsApp groups were created to promote candidates in the recent elections including far right former army captain Jair Bolsonaro, who was initially starved of coverage via TV. Facebook itself has belatedly invested in collaborations with fact-checkers, digital literacy campaigns, and has made it harder to share messages within WhatsApp.

For more background see section 3: Analysis by Country, Brazil and South Africa

The spread of misinformation often happens via groups that are set up specifically to discuss politics. These are common in WhatsApp, mainly in developing countries, but have also become a greater focus in Facebook itself, which recently prioritised these posts in the newsfeed. Facebook Groups have come under scrutiny for their role in co-ordinating the recent Yellow Vest (Gilets Jaunes) protests in France. But how many people use Facebook Groups and how do these differ from the way people use groups in WhatsApp?

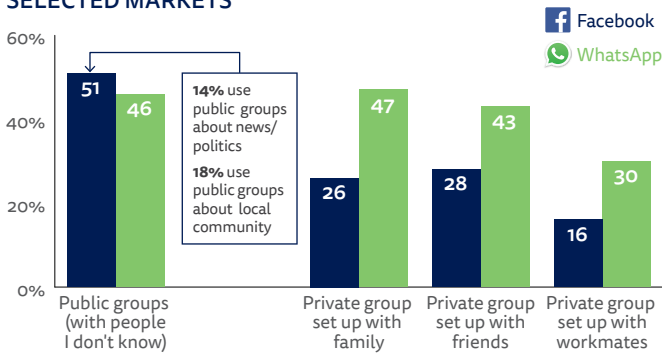
This year, we explored these questions in detail across nine countries and found that although half of Facebook users (51%) have joined some kind of public group, only a minority use them for news and politics (14%). That figure rises to 22% in Brazil and 29% in Turkey. The majority of Facebook Groups are for non-news subjects including gardening or sport (22%), their local community (18%), and parenting (7%).

By contrast we find that WhatsApp is primarily used for private groups, most often with friends and family or workmates. News may come up in discussions but is not the primary purpose.

For further analysis see section 2.2: Groups and Private Networks – Time Well Spent?

¹¹ India Digital News Report, Mar. 2019: <https://reutersinstitute.politics.ox.ac.uk/our-research/india-digital-news-report>

PROPORTION OF FACEBOOK AND WHATSAPP USERS THAT USED EACH TYPE OF GROUP IN THE PAST MONTH – SELECTED MARKETS



Q12_2019_FB/WA. Facebook/WhatsApp allows you to set up, join, and participate in groups, where you can discuss news or related topics with like-minded people. Which, if any, of the following have you used in the past month on Facebook/WhatsApp itself? Base: Facebook/WhatsApp users: Nine countries = 12,975/9636. Note: This question was asked in USA, UK, Spain, Ireland, Turkey, Malaysia, Australia, Canada, and Brazil.

Behind the averages, we find a marked difference in the way WhatsApp groups are used across countries. In Brazil, almost six in ten WhatsApp users (58%) take part in groups with people they don't know, compared with just over one in ten (12%) in the UK. Almost a fifth (18%) discuss news and politics in a public WhatsApp group in Brazil compared to just 2% in the UK, potentially increasing the chances of misinformation being spread. We find that people who used groups in WhatsApp and Facebook have lower trust in the news and are more likely to use partisan news sites.

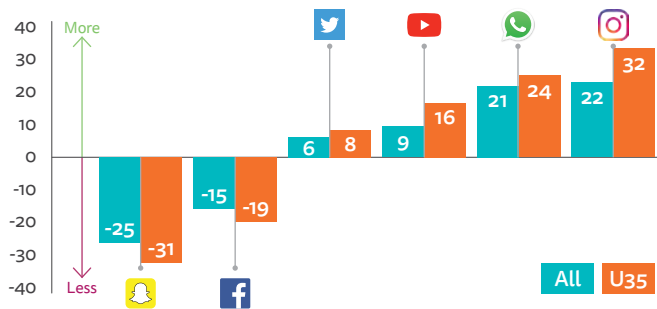
PEOPLE SPENDING LESS TIME WITH FACEBOOK, MORE WITH INSTAGRAM

Further evidence of the changing shape of social media comes in a new survey question we asked about how much time people spend with each social network or messaging app.

The picture in the UK is typical of many Western countries and shows that many people are spending less time with Facebook and more time with Instagram and WhatsApp. We have calculated figures in the next chart by subtracting the proportion that say they spent less time from the proportion that say they spent more.

For example, almost half (46%) of under 35s in the UK said they spent more time with Instagram in the last year but 14% said they spent less. The net difference is +32%.

NET DIFFERENCE IN TIME SPENT WITH EACH SOCIAL NETWORK IN LAST YEAR – UK



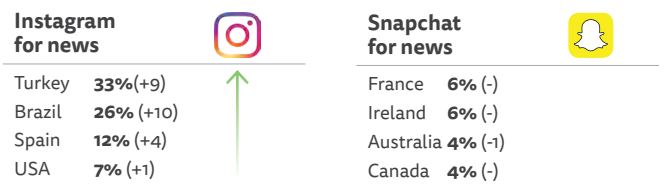
Q12C_2019. You say you use the following social networks for any purpose, in the last 12 months, has the amount of time you spend using them changed? Base: All/under 35s that used each social network in the last week: Facebook = 1337/300, YouTube = 1002/282, WhatsApp = 1007/279, Instagram = 525/238, Snapchat = 209/142, Twitter = 536/163. Note: Showing difference between proportion that said 'more time' and proportion who said 'less time'.

Younger groups in many countries seem to be swapping Snapchat for Instagram, which has become, for many, the 'go-to' social network. This year's depth interviews confirm that young people are spending less time with Facebook, even if they are not abandoning it altogether.

"I think I used to use Facebook a lot, and over past five, six years, I basically hardly use it at all now, which is one massive change. In its place, Instagram has come."

Chloe, 31–35, UK in-depth interview

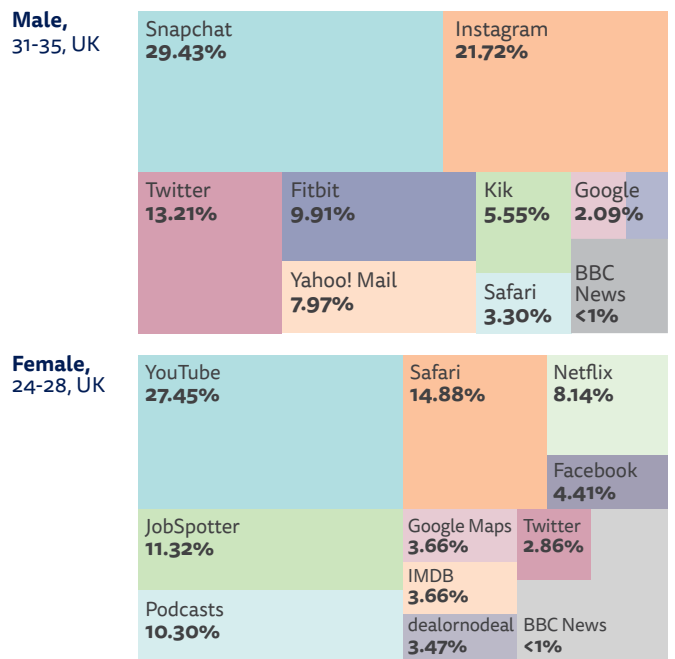
PROPORTION THAT USED INSTAGRAM AND SNAPCHAT FOR NEWS – SELECTED MARKETS



Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Base: Total sample in each country = 2000.

We were able to get further insights into the behaviour of younger groups in the US and UK (so called Gen Z and Gen Y) by tracking the amount of time they spent on different mobile apps and websites over a ten-day period.¹² This reveals the overwhelming importance of social media and communications to these younger groups. In these time charts (see below) taken from the mobile phone usage of two of our respondents, notice the relatively little time spent within Facebook compared with Instagram, YouTube, Snapchat, and even Twitter.

PROPORTION OF TIME SPENT WITH DIFFERENT MOBILE APPS – TWO INDIVIDUAL RESPONDENTS OVER 10 DAYS



¹² With the permission of the participants, we added tracking code to the mobile phones of around 20 young people in the US and UK so online behaviour, time spent, and specific news journeys could be measured.

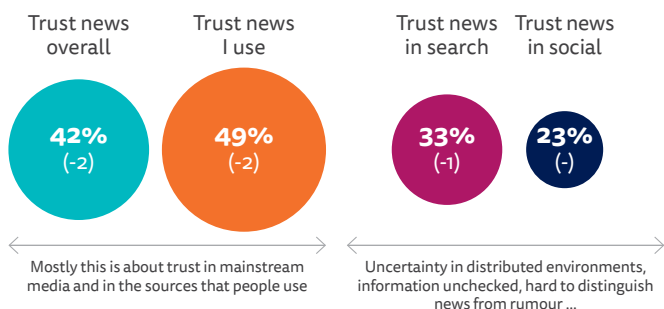
It is striking that communication, social media, and web-browsing apps dominated the time spent for all 20 young people tracked as part of our study. This shows the importance of finding ways to bring at least some news to social platforms if younger groups are to be engaged. In both illustrated cases, less than 1% of time was spent with BBC News, the most popular news app.

For further analysis see section 2.5: How Younger Generations Consume News Differently

TRUST AND ATTITUDES TO THE NEWS MEDIA

Overall trust in the news is down 2 percentage points (all market average) from 44% to 42%, with trust in the news people use themselves falling below 50%. Trust in the news found in distributed environments, like social media (23%) and search (33%), is even lower but is largely unchanged from last year.

PROPORTION THAT TRUST MOST NEWS FROM EACH MOST OF THE TIME – ALL MARKETS



Q6_2016_1/6/2/3. Please indicate your level of agreement with the following statements: I think you can trust most news/most news I consume/news in social media/news in search engines most of the time. Base: All markets: 75,749.

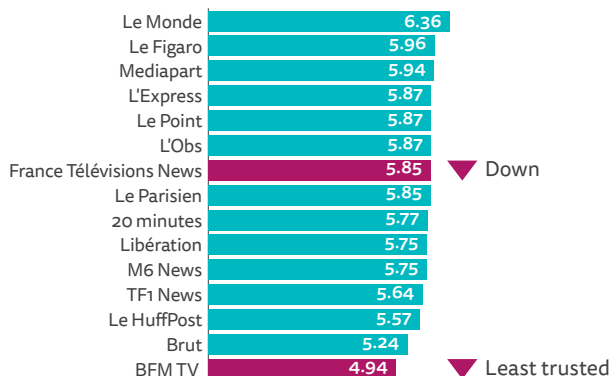
At a country level, we continue to find stark differences. The media remain broadly trusted in Finland (59%), Portugal (58%), and Denmark (57%), while less than a third say they have confidence in the news in Hungary (28%), Greece (27%), or Korea (22%). In many of these countries the media are not considered to be sufficiently independent from political or business elites.

Specific events clearly have affected trust in a number of countries this year. Trust is down 11 points in Brazil after the recent fractious election, but perhaps the biggest surprise is a 11-point fall in trust in France from 35% to 24%, driven by the partisan nature of the Yellow Vest protests. Some journalists were attacked – sometimes physically – for not representing the protestors and being part of the establishment.¹³ But lower trust does not necessarily mean lower usage. 24-hour news channel BFM achieved some of its highest ever ratings at the same time as showing a significant fall in trust scores (5.9 to 4.9 on a ten-point scale).



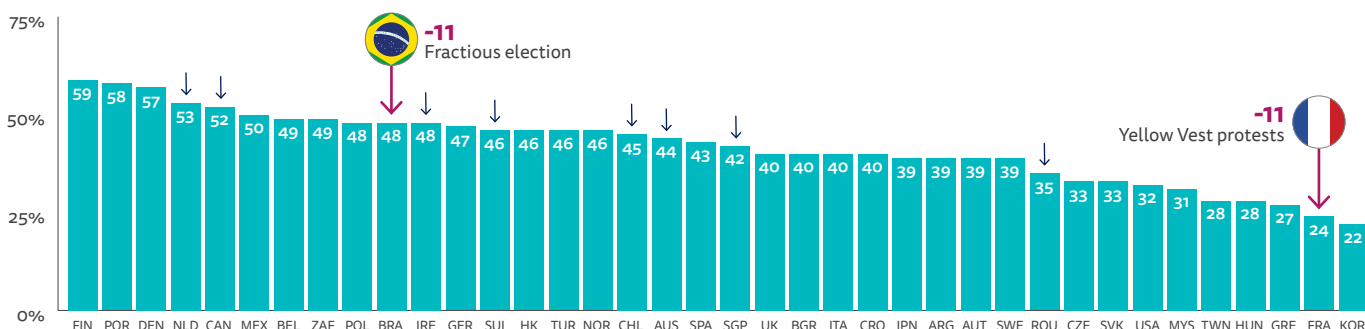
AVERAGE BRAND TRUST SCORES – FRANCE

Rated on 0–10 scale, all those who have heard of brand



Q6_2018_trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: All that have heard of each brand > 1000.

PROPORTION THAT TRUST MOST NEWS MOST OF THE TIME – ALL MARKETS



Q6_2016_1. Please indicate your level of agreement with the following statements: I think you can trust most news most of the time. Base: Total sample in each market = 2000, Taiwan = 1005.

¹³ <https://uk.reuters.com/article/uk-france-protests-press/french-media-denounce-violent-yellow-vest-attacks-on-press-idUKKCN1P70J5>

Major upheavals like the Yellow Vests or Brexit in the UK have put a strain on perceived impartiality of the news media, which in turn can affect trust. But if we look over time across some of our biggest countries, we see a generalised – and worrying – picture of decline. Even countries like Finland and Germany, which have not seen dramatic polarising events, have seen falls of 9 and 13 percentage points respectively in just five years. Across the 12 countries we have been tracking since 2015, trust scores are down on average by 4 points though they have risen slightly in Italy, Spain, Australia, and Ireland and have remained level in the Netherlands and Denmark.

PROPORTION THAT TRUST MOST NEWS MOST OF THE TIME (2015 AND 2019) – SELECTED MARKETS

	2015	2019	Change
Finland	68%	59%	-9
Germany	60%	47%	-13
UK	51%	40%	-11
USA	32%	32%	-
France	38%	24%	-14
12 country average	47%	44%	-4

Q6_2016_1. Please indicate your level of agreement with the following statements: I think you can trust most news most of the time. Base: Total 2015/2019 sample in each country = 2000, Finland 2015 = 1509. Note: 12 country average includes UK, USA, France, Germany, Denmark, Finland, Italy, Spain, Japan, Brazil, Australia and Ireland.

It is also notable in the table above that trust levels in the United States (32%) have remained flat overall, but this hides a much richer and more dramatic story.

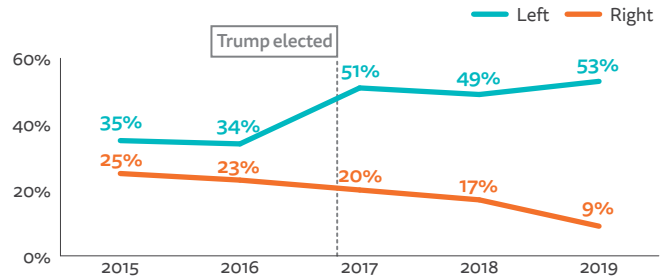
Digging into the detail, we find an *increase in trust (+18pp)* amongst those who self-identify on the left of the political spectrum as they lent their support to liberal media outlets in the wake of Donald Trump’s victory. Over the same period, we have seen the *almost total collapse of trust on the right to just 9%*.

In the UK, we don’t see the same picture. Trust on both the left and the right has fallen, but if anything the trust gap has narrowed – perhaps because both are equally unhappy about Brexit coverage, which crosses party lines. Whatever the reasons, there has been no total loss of confidence amongst those on the right.

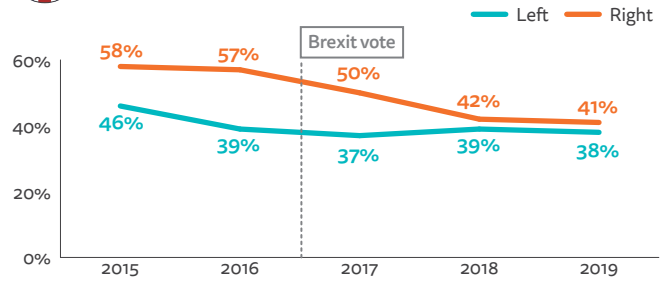
PROPORTION THAT TRUST MOST NEWS MOST OF THE TIME – USA AND UK



USA: Left trust has increased in US news media, right has collapsed



UK: Right trust in the UK news media still higher than left



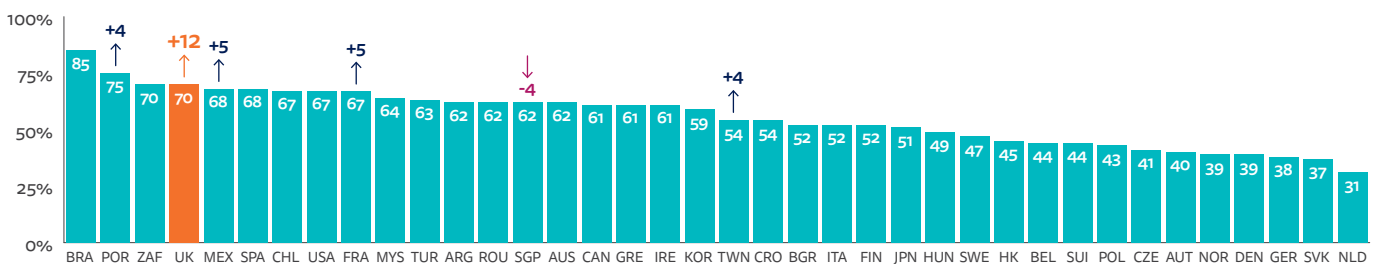
Q6_2016_1. Please indicate your level of agreement with the following statements: I think you can trust most news most of the time. Q1f. Some people talk about ‘left’, ‘right’, and ‘centre’ to describe parties and politicians. With this in mind, where would you place yourself on the following scale? Base: 2015-18 Left/Right: USA = 500/500, UK = 500/300.

MISINFORMATION AND DISINFORMATION

More than half (55%) of our sample across 38 countries remains concerned about their ability to separate what is real and fake on the internet. Concern is highest in Brazil (85%), South Africa (70%), Mexico (68%), and France (67%), and lowest in the Netherlands (31%), and Germany (38%), which tend to be less polarised politically.

The biggest jump in concern (+12pp) came in the UK (70%) where the news media have taken a lead in breaking stories about misinformation on Facebook and YouTube and there has been a high-profile House of Commons inquiry into the issue.

PROPORTION CONCERNED ABOUT WHAT IS REAL AND WHAT IS FAKE ON THE INTERNET WHEN IT COMES TO NEWS – ALL MARKETS

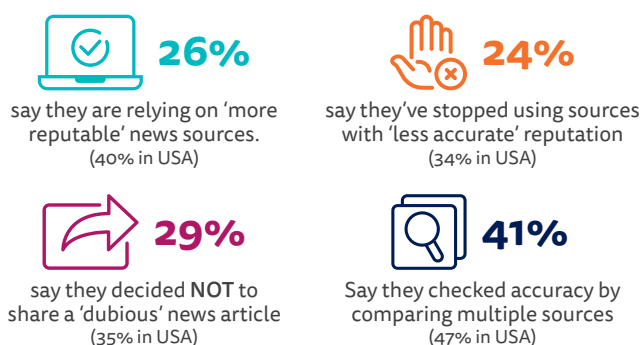


Q_FAKE_NEWS_1. Please indicate your level of agreement with the following statement. – Thinking about online news, I am concerned about what is real and what is fake on the internet. Base: Total sample in each market = 2000, Taiwan = 1005.

IMPACT OF MEDIA LITERACY?

One consequence of this concern seems to be a greater awareness and affinity with trusted news brands. One positive finding of our report this year is that over a quarter (26%) have started relying on 'more reputable' sources of news – rising to 36% in Brazil and 40% in the US. A further quarter (24%) said they'd stopped using sources that had a 'less accurate reputation', with almost a third (29%) deciding not to share a potentially inaccurate news article. The interpretation of 'reputable', 'less accurate', 'dubious', and other subjective terms were left to respondents to determine.

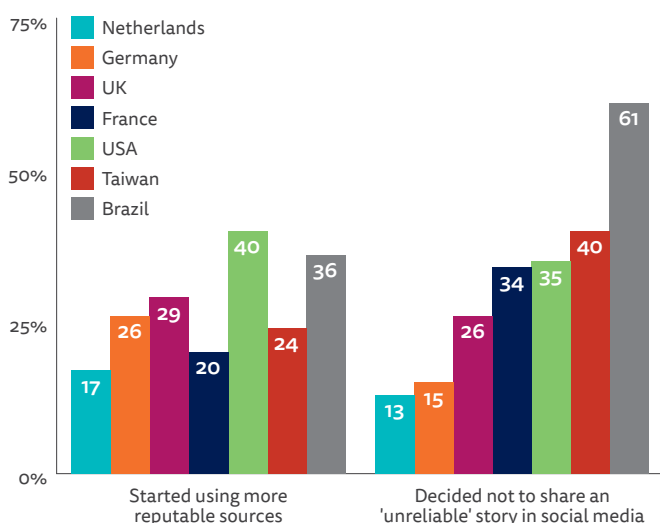
PROPORTION THAT SAY THEY HAVE CHANGED ONLINE HABITS IN THE LAST YEAR – ALL MARKETS



Q_LIT_2019. Have you done one of any of the following in the last year? Base: Total sample = 75,749.

Behaviour seems to have changed most in countries where concern about misinformation is highest. Almost two-thirds (61%) in Brazil said they had decided not to share a potentially inaccurate story in social media and 40% in Taiwan after recent elections marked by misinformation – compared with just 13% in the Netherlands, the country with the lowest level of concern in our survey. The shift to more reputable sources is a bit more evenly split.

PROPORTION THAT SAY THEY HAVE CHANGED ONLINE HABITS IN THE LAST YEAR – SELECTED MARKETS



Q_LIT_2019. Have you ...started relying more on sources of news that are considered more reputable in the last year? Base: Total sample in each market = 2000, Taiwan = 1005.

We picked up similar sentiments in our qualitative research with younger groups in the UK and the US. Many of our respondents said that they were now paying more attention to the name of the brand when using social media. Others said they were calling out friends more often for sharing inaccurate news.

"If I see something like New York Times, Bloomberg, Washington Post, I'm going to assume that it's credible and valid but if I see something that's on a news website that I've never heard of before, I'm more likely to question the source of the news."

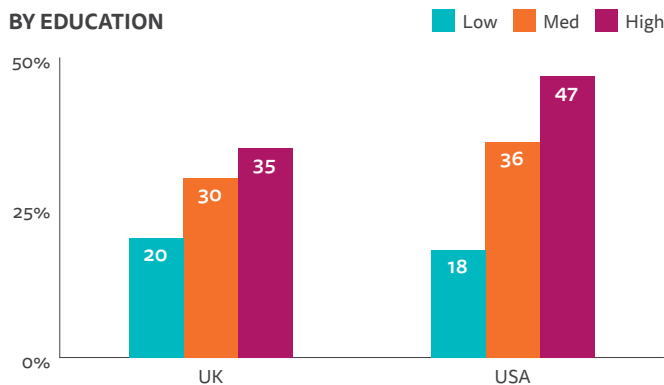
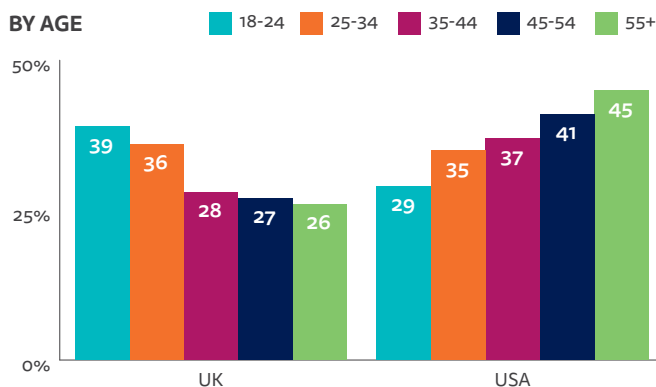
Maggie, 21-24, US in-depth interview

"I think I'm much more limited in the news that I access now, because of this ... I think the ones that you trust are the traditional ones that have been around for a long time, like the BBC, like the Guardian, like the Independent"

Chloe, 31-35, UK in-depth interview

All this suggests that higher media awareness and digital literacy campaigns may be having some effect, though it should be noted that change has been more evident with the better educated who arguably may be less likely to be duped anyway. In the United Kingdom it is mainly younger groups that have modified their behaviour, while in the United States the biggest change has come with older demographics.

PROPORTION THAT SAY THEY HAVE STARTED USING MORE REPUTABLE NEWS SOURCES BY AGE AND EDUCATION – UK AND USA



Q_LIT_2019. Have you ...started relying more on sources of news that are considered more reputable in the last year? Base: 18-24/25-34/35-44/45-54/55+ and low/medium/high education: UK = 135/278/304/323/983 and 558/626/839, USA = 177/380/320/246/889 and 85/1013/914.

ALTERNATIVE AND PARTISAN NEWS WEBSITES

We have seen a continuing rise of populism in many countries and a further fall in trust in established media over the last year. At the same time, we find greater consumer literacy and changes to Facebook algorithms designed to damp down extreme and polarising views. But what has been the outcome of these conflicting trends on the reach of alternative and partisan news sites?

These sites are said to have played a part in bringing Donald Trump to power in the United States, reshaping decades of centrist politics in Sweden, and mobilising support for Jeremy Corbyn in the UK. Partisan sites should be distinguished from those that 'deliberately fabricate the news', even if they are often accused of exaggerating or tailoring the facts to fit their cause.

Examples are Breitbart and InfoWars in the United States (right-wing), Fria Tider in Sweden (right-wing), and the Canary and Evolve Politics in the UK (left-wing). Though ideology is a key motivator, some sites are also looking to make money, or at least break even, from these activities. The narrowness of their focus also separates them from established news sites like Fox News and Mail Online, which also have a reputation for partisan political coverage, but tend to cover the full range of news (world news, sport, entertainment).

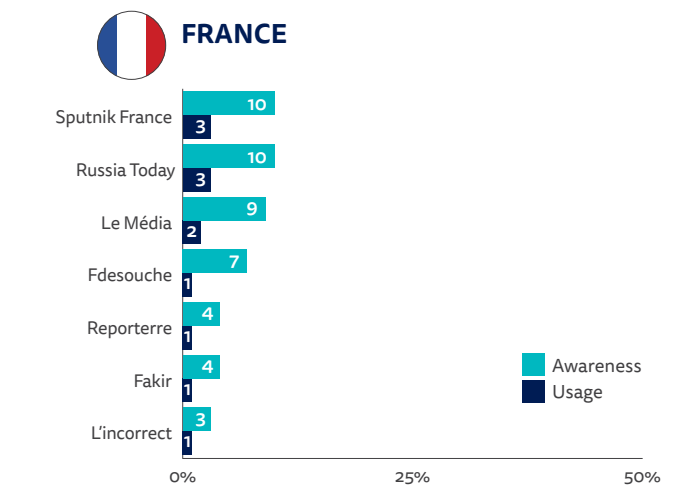
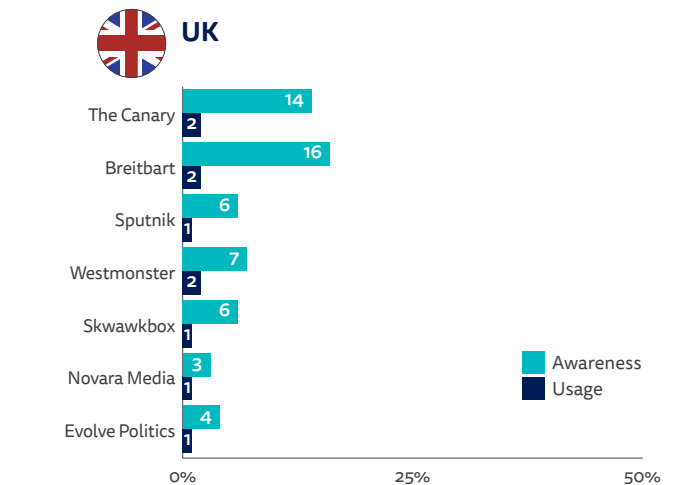
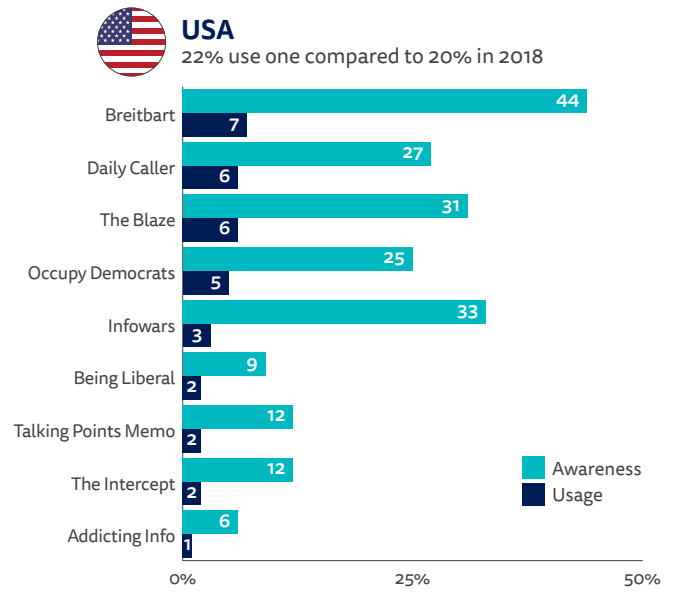
Working with local partners, we have identified a number of sites that matched our criteria and this year we have added sites in France and Brazil to our list.

The data below suggest that there has been little change in weekly usage of these sites in countries like the US, Sweden, and Norway where these sites are used by a significant proportion of the population. Even if social media algorithms are promoting these sites less, users and supporters are still finding ways to access them.

In all three countries we also see a large gap between awareness of these sites and actual usage, which suggests that their impact on the wider discussion is not just confined to users. As last year, we also note a wide variation in usage. Almost a quarter (22%) of our Swedish sample accesses one or more of seven partisan and alternative websites, and over half are aware of them – while these types of sites hardly feature at all in the Netherlands or Belgium. Even at a time of high tension in the UK over Brexit, only 7% use one or more of these sites weekly compared with almost a quarter in the United States (22%).

Alternative and partisan sites elsewhere have a more diverse set of motivations. In France these include Russian state broadcaster RT which gave exhaustive and often uncritical coverage of the Yellow Vest protesters. RT France in particular was accused of spreading lies, specifically that the police had been siding with protesters. Our data suggest high awareness of both RT and Sputnik (10%) but relatively low usage (3% for each).

PROPORTION THAT HAVE HEARD OF/USED EACH IN THE LAST WEEK – USA, UK, AND FRANCE



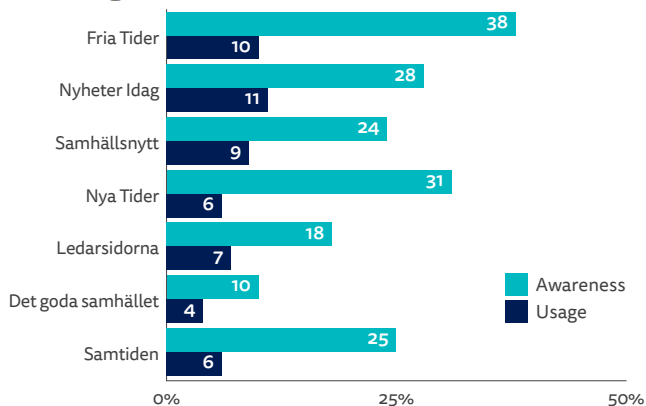
Q5c_2018_1/2. In recent years a number of online news sites have emerged with their content often distributed via social media. Which, if any, of the following have you heard of/used in the last week? Base: Total sample: USA = 2012, UK = 2023, France = 2005.

PROPORTION THAT HAVE HEARD OF/USED EACH IN THE LAST WEEK – SWEDEN, BRAZIL, AND NORWAY

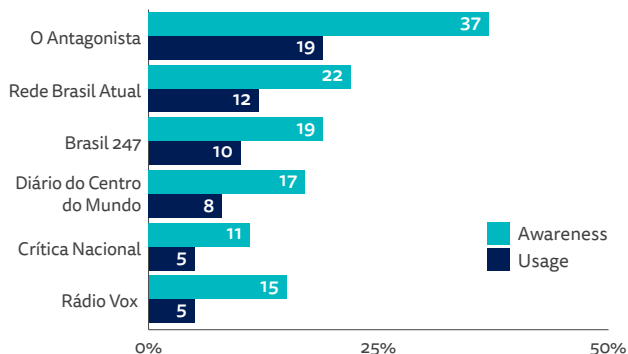


SWEDEN

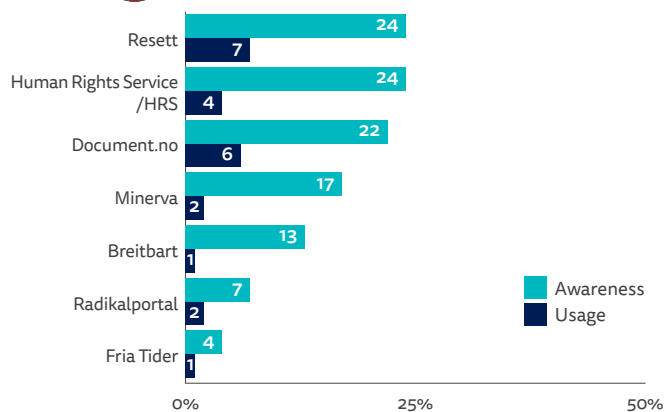
22% use one compared to 20% in 2018



BRAZIL



NORWAY



Q5c_2018_1/2. In recent years a number of online news sites have emerged with their content often distributed via social media. Which, if any, of the following have you heard of/used in the last week? Base: Total sample: Sweden = 2007, Brazil = 2013, Norway = 2013.

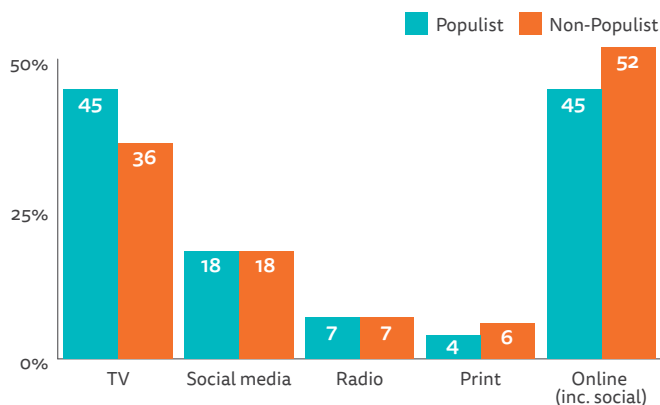
POPULISM AND THE MEDIA

The growth of populism, for example in the UK and France, is putting enormous strains on left/right political party systems. But it is also raising new questions for journalists over how far to represent populist views, and how to satisfy a readership that no longer splits easily along traditional lines.

This year we have attempted to add a populist dimension to our study of media consumption by measuring responses to two questions; first, how distant respondents feel from their elected representatives and, second, how respondents feel about the people taking more important decisions directly. Putting these responses together we can create a group of people in each country with broadly populist attitudes and one with less populist attitudes.

One surprising finding is that populists prefer to use television news compared with non-populists and are less likely to prefer online news. These data will support those who argue that the role of social media has been overplayed when explaining the rise of Donald Trump compared with the part played by supportive television networks like Fox News.

MAIN SOURCE OF NEWS BY POPULIST ATTITUDES – USA



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 with populist/non-populist attitudes that used a source of news in the last week: USA = 1012/823. Note. See section 2.3 for how we identified populist attitudes.

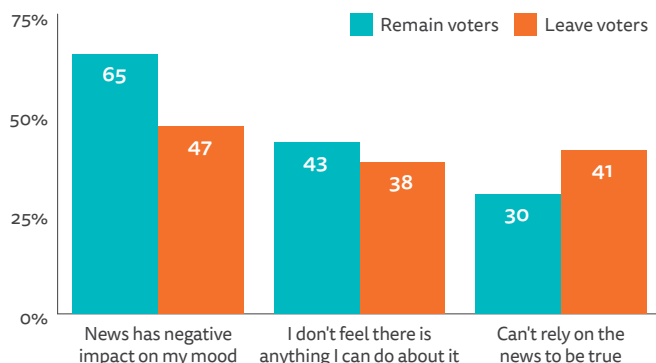
Populists in the United States are no less or more likely to use social media as a main source when compared with non-populists. However, they are more likely to share and distribute news in social media and take part in groups about news and politics. They tend to prefer Facebook, whereas non-populists gravitate towards Twitter.

We also find that in most countries (eg United States, Spain) left-right perspectives still have a bigger impact on media choices than populist attitudes. But it is a different story in Germany and Sweden. Later in this report we explore this subject in more detail and map media usage against both dimensions.



For further analysis see section 2.3: *The Rise of Populism and the Consequences for News and Media Use*

REASONS FOR AVOIDING NEWS AMONGST REMAIN AND LEAVE VOTERS – UK



Q1dii_2017. Which, if any, of the following are reasons why you actively try to avoid news?
Base: Remain/Leave voters who actively avoid the news: UK = 999/829. Note: Data from separate follow-up fieldwork conducted 11-12 February 2019.

NEWS OVERLOAD

Others still (28%) agree that there is too much news these days, which partly reflects the way in which constant news updates and different perspectives can make it hard to know what is really going on. A common complaint is that users are bombarded with multiple versions of the same story or of the same alert. '[There is] too much conflicting and confusing news', said one respondent to our UK survey. Perception of overload is highest in the United States (40%), where even the president adds to the noise with regular tweets. It is lower in countries with a smaller number of publishers like Denmark (20%) and the Czech Republic (16%).



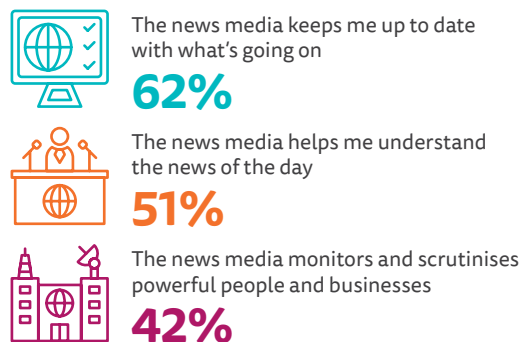
EVALUATIONS OF THE NEWS MEDIA

In this age of greater turbulence, complexity, abundance, and competition, how is the news media doing in meeting expectations of its role in society?

This year we asked respondents to evaluate the performance in five areas: whether they think the news media focuses on the right topics, helps them properly understand current events, keeps them up to date, uses the right positive/negative tone, and does a good job of monitoring and scrutinising the powerful.

Across all countries, most people agree that the news media keeps them up to date with what's happening (62%), but only half (51%) say news media help them understand the news. Just four in ten (42%) think that the news media does a good job in its watchdog role – scrutinising powerful people and holding them to account. These qualities of explanation and scrutiny are at the very core of the mission of journalism in many countries, and these scores speak directly to declining trust in the news.

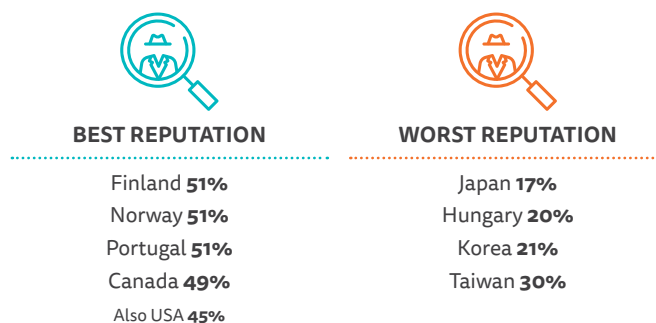
PROPORTION THAT AGREED WITH EACH ATTITUDE TOWARDS THE NEWS – ALL MARKETS



Q15_2019_1/4/5. Please indicate your level of agreement with the following statements: the news media monitors and scrutinises powerful people and businesses/the news media keeps me up to date with what's going on/the news media helps me understand the news of the day. Base: Total sample = 75,749.

There are interesting country differences in terms of these attributes. News organisations in rich, Northern European countries like Finland (51%) and Norway (51%) tend to have the best reputation for holding the rich and powerful to account. By contrast, media in nations such as Hungary (20%) and Japan (17%) are seen to be doing a poor job in this regard.

PROPORTION THAT AGREED THE NEWS MEDIA MONITORS AND SCRUTINISES POWERFUL PEOPLE AND BUSINESSES – SELECTED MARKETS



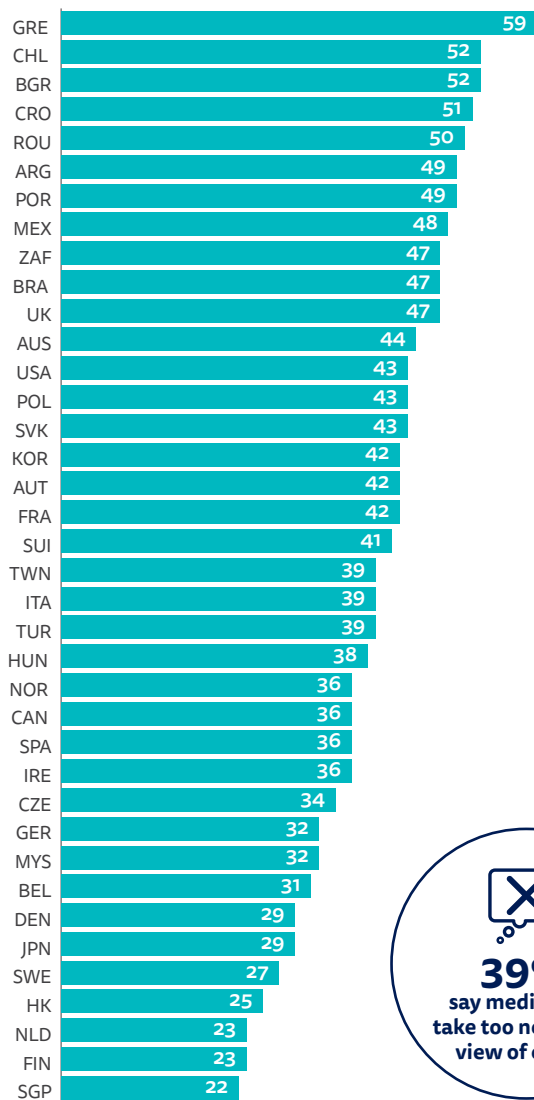
Q15_2019_1/4/5. Please indicate your level of agreement with the following statements: the news media monitors and scrutinises powerful people and businesses. Base: Total sample in each market ≈ 2000, Taiwan = 1005.

Even in countries with the highest reputation we find a significant gap between journalists' own perceptions about how well they are doing their job and the views of news consumers. Further international comparisons are explored later in this report.

For further analysis see section 2.4: What do People Think about the News Media?

Looking at the two other dimensions in our survey, we find surprisingly little criticism of the media’s agenda-setting role, with only a minority (25%) feeling that the topics selected are not relevant to their lives. There seems to be more of a problem with the tone taken by the news media to those stories. Four in ten (39%) think that the news media take too negative a view of events. This is a complex statistic to interpret, not least because a difficult or ‘negative’ press is often the flip side of robust scrutiny. It may be no coincidence, for example, that a country like Singapore has the least negative media (22%) but also scores poorly in term of robust scrutiny (32%). But elsewhere it is interesting to note that many countries that have the best reputation for holding the powerful to account (Finland, Netherlands) are also seen as least negative (23%). Equally, many countries where the news media have a poor watchdog record are seen as having the most negative press (Greece 59%, Bulgaria 52%).

PROPORTION THAT THINK THE MEDIA IS OFTEN TOO NEGATIVE – ALL MARKETS



39%
say media often
take too negative a
view of events

Q15_2019_3. Please indicate your level of agreement with the following statement: The news media often takes too negative view of events. Base: Total sample in each market = 2000, Taiwan = 1005.

These themes around the negativity of the news media also came out strongly in our in-depth interviews with young people this year in the US and UK. In the US, the idea of negativity was often associated with perceptions that a negative or unfair agenda was being pursued by a publication (against Donald Trump or Serena Williams for example). In the UK, many of our interviewees felt that some (popular) media outlets simply had an unconstructive mindset:

“The Daily Mail. They are always on social media, trying to make someone look bad.”

Ellie, 18–20, UK

“News is a major negative and has a huge impact on everyone who watches it. There is never any positive or happy news.”

Female, 24–35, UK

BROKEN NEWS?

Along with the earlier evidence that some people are avoiding the news or are worn out by the amount of news, these kinds of data have fuelled new initiatives around ‘slow news’ (De Correspondent, Zetland, Republik, Tortoise Media,) and *constructive or solutions-based journalism* (HuffPo, BBC World Hacks). The founders of these initiatives argue that traditional news models and approaches are broken and they are looking to respond with more meaningful, inclusive, and less relentlessly negative coverage – often developed in closer collaboration with audiences.



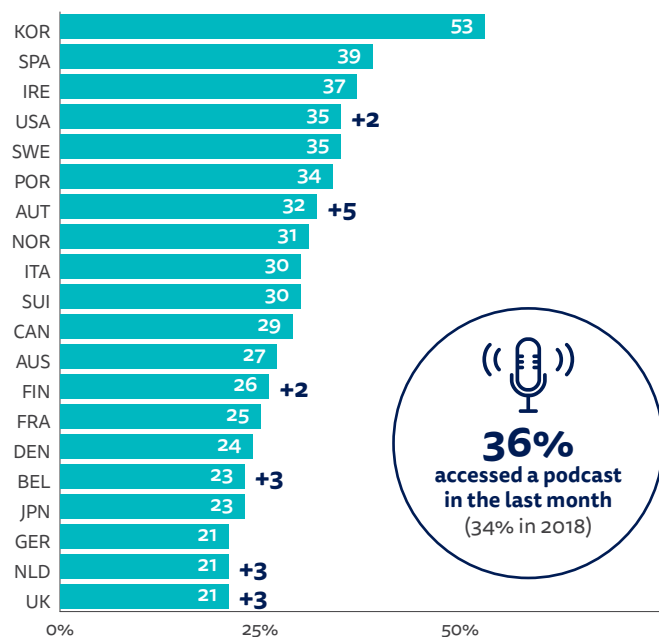
At the same time, other media companies are looking to respond to the gap identified here between updatedness and understanding. Vox Media has built a formidable reputation for *explanatory journalism*, an approach that works particularly well with younger people looking to understand complex issues. Many traditional media companies have adopted similar approaches (BBC Reality Check).

Others are looking to attract young people through a less traditional agenda, often using new formats and voices (BuzzFeed, Vice).

PIVOT TO AUDIO PICKS UP PACE

Podcasts have been around for many years but these episodic digital audio files appear to be reaching critical mass as a consequence of better content and easier distribution. Over a third of our combined sample (36%) now say they have consumed a podcast in the last month, with almost one in six (15%) saying they have consumed one about news, politics, or international news.

PROPORTION THAT USED A PODCAST LAST MONTH – SELECTED MARKETS



Q1F 2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Base: Total sample in each country = 2000.

The *Guardian*, *Washington Post*, *Politiken*, *AftenPosten*, *The Economist*, and the *Financial Times* are amongst dozens of publishers to have launched daily podcasts in the last year. This follows the runaway success of the *Daily* from the *New York Times*, which has around 5m daily listeners, is rebroadcast on public radio, and is about to get a video spin-off series. Meanwhile the BBC has rebranded its on-demand radio app as BBC Sounds to reflect the shift to on-demand consumption and the growing interest of the podcast generation.

In the UK, younger age groups, who spend much of their lives plugged into smartphones, are four times more likely to listen to podcasts than over 55s – and much less likely to listen to traditional speech radio. Under 35s consume half of all podcasts despite making up around a third of the total adult population.

The core appeal of podcasts is the ease of use, and the ability to listen while doing something else. But for younger users podcasts also provide more authentic voices and the control and choice they've become used to.

“With radio you can't control what shows are on, whereas podcasts you can.”

Mark, 31–35, US

“You're not actively searching something or reading a screen. You're letting it wash over you.”

Chloe, 31–35, UK

In terms of location, younger people are more likely to access podcasts when out and about, while older groups often listen in bed when having difficulty sleeping, as well as when walking the dog or doing the chores at home.

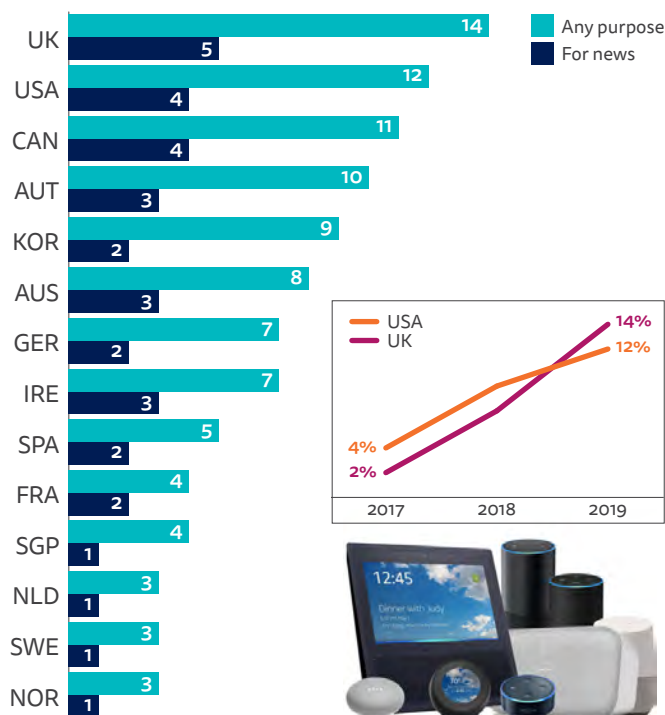
But the age of innocence could be over as money starts to trickle into podcasts. Advertising is becoming more intrusive; Spotify and other platforms have started to pay for exclusive premium content (blockbusters), and publishers like *Politiken* have started to restrict two or three of their daily briefings to subscribers only. This new money has brought more professional content and higher production values, but some fear that the purity and authenticity of the podcast experience could be lost in the process.

For further analysis see section 2.6: Podcasts: Who, Why, What, and Where?

USAGE OF VOICE-ACTIVATED SPEAKERS DOUBLES AGAIN, BUT NEWS USAGE REMAINS DISAPPOINTING

Audio prospects may be further boosted by the rapid adoption of voice-activated speakers such as the Amazon Echo and Google Home. Reach for *any purpose* has grown from 7% to 14% in the UK over the last year, from 9% to 12% in the United States, and from 5% to 9% in high-tech Korea. However, the proportion using smart speakers for news is declining as mainstream audiences come on stream. Less than four in ten access any news via their device in an average week in the US (35%) and UK (39%) and just a quarter in Germany (27%) and South Korea (25%).

PROPORTION THAT USED A SMART SPEAKER FOR ANY PURPOSE/FOR NEWS IN THE LAST WEEK – SELECTED MARKETS

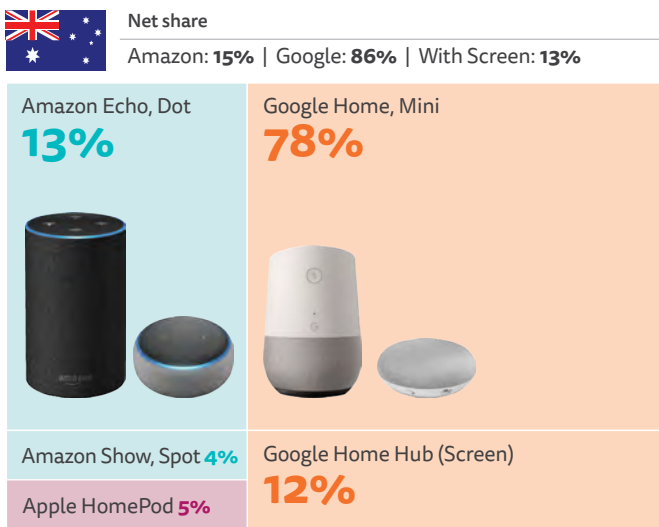
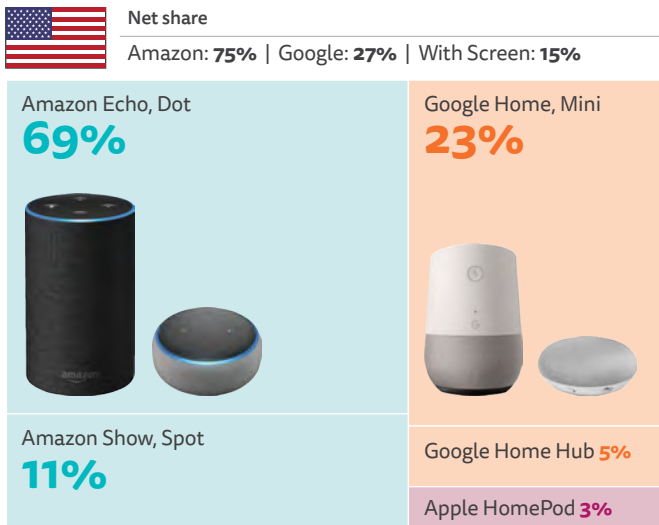


Q8A/B. Which, if any, of the following devices do you ever use for any purpose/for news in the last week. Base: Total sample in each country = 2000.

Over the last year, both Google and Amazon have launched in a range of new markets including India, Spain, Mexico, and a number of Nordic countries.

Amazon still has a dominant position in the US, UK, and Germany but Google leads in a number of markets where it launched first, including Australia and Canada. Devices with screens like the Amazon Show and Spot have so far made little impact, with our research suggesting that the last thing most consumers want is more screens in their lives.

PROPORTION OF SMART SPEAKER OWNERS THAT USE EACH DEVICE – USA AND AUSTRALIA



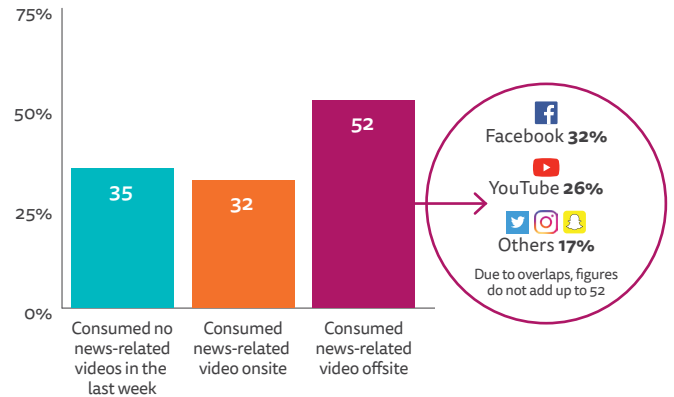
Q8C_2019. You say you have a smart speaker, which of the following models do you ever use? Base: USA = 273, Australia = 161.

The issue of platform power is likely to become an increasingly important issue for publishers over the next year as Google and Amazon look to provide more aggregated news services in voice. But many are wary about helping to build value for platforms – again – without any path to monetisation.

VIDEO NEWS CHANGING SHAPE

Video is a case of platform power writ large. Most video news consumption takes place on Facebook (32%) and YouTube (26%), where the context and monetisation rules are set by the tech companies. Over the last year Facebook has become a little less important for news video, with other platforms like Twitter, Instagram, and Snapchat becoming a little more important (+3).

OFFSITE VS ONSITE NEWS VIDEO CONSUMPTION – ALL MARKETS



Q11_VIDEO_2018a. Thinking about consuming online news video (of any kind) over the last week, which of the following did you do? Base: Total sample = 75,749, UK = 2023, Hong Kong = 2056, Turkey = 2074.

Short form video (straight news clips or crafted with music and subtitles) remains the most popular format for news but this has become increasingly hard for publishers to monetise. Facebook has switched its focus towards longer, scripted current affairs shows for Facebook Watch. Netflix and HBO have now joined the competition for this longer form content with significant amounts of money changing hands. *Explained* from the US publisher Vox is one long-form news series that has been recommissioned by Netflix for a second series.



It is worth pointing out that more than a third (35%) of our combined sample does not consume any online news video in an average week, a figure that rises to 54% in the UK and Germany. Platforms like YouTube have become an important centre of opposition media in Turkey, with 83% of our urban sample saying they have consumed news via offsite platforms. The vast majority (68%), across all countries, still say they prefer to consume news in text, though a significant minority of under 35s (13%) say they prefer to consume news in video.

CONCLUSION

This year's report sees the news industry at yet another crossroads. Publishers are pushing hard to distinguish high-quality journalism from the mass of information that is now published on the internet – and more and more of them are looking to charge for that difference. Some traditional brands may be helped by concerns about misinformation, which mean that people are once again paying more attention to 'reputable' brands – even as others continue to complain about media bias and negativity. There is no sign that the majority of people are about to pay for online news, although many recognise that information on the internet is often overwhelming and confusing. Younger audiences in particular don't want to give up instant, frictionless (and ideally free) access to range of diverse voices and opinions. They don't want to go back to how the media used to be.

Some of the biggest brands have already shown they are able to attract a large number of paying subscribers, but the road ahead will be more challenging for other publishers. Loyalty and the ability to forge direct connections will be critical, as our data clearly indicate, but this will be hard to achieve just through the desktop or mobile web where news access tends to be fleeting and distracted. That's why publishers are showing such interest in podcasts, longer form video, and even live events – more immersive formats that allow a brand personality to be expressed more fully while maintaining the choice and control demanded by a younger generation.

Wider changes are also in the air as subscription-based bundled businesses like Netflix, Spotify, Amazon (and now Apple) edge into the news market. Even Facebook has floated the idea of a dedicated news tab where content might be paid.¹⁴ But the relationship with these subscription players is unlikely to be any easier than with existing ad-focused models we've been used to. Platforms will want to take a substantial cut in revenue in return for distribution and will ultimately own the relationship with the customer. Established forms of distributed discovery like search and social media continue to be important, but newer platform products and services such as private messaging, mobile aggregators, and voice systems are starting to make an impact too. It is a crucial question whether publishers can in fact use these new platform services in ways that are mutually beneficial and deliver sustainable returns for publishers.

Despite the greater opportunities for paid content, it is likely that most commercial news provision will remain free at the point of use, dependent on low margin advertising, a market where big tech platforms hold most of the cards. This is where competition for attention will be most acute, where journalistic reputation will be most at risk, and where diversified revenue streams and smart strategies will be most critical for survival.

A number of media companies are unlikely to make this difficult transition. Many news publishers are stuck in a vicious cycle of declining revenue and regular cost cutting, as illustrated within our country page section this year. We also find some governments – increasingly alarmed by market failure, especially in local news and investigative journalism – considering using public money and other measures to support public interest journalism. Elsewhere, we find authoritarian-minded politicians looking at the weakness of commercial media as an opportunity to capture or unduly influence the media. These trends continue to play out at different paces in different places with no single path to success. Media users all over the world continue to flock to digital websites and platforms, and engage with many kinds of journalism online and offline. But we are still some way from finding sustainable digital business models for most publishers.

¹⁴ 'Facebook may pay publishers to put their stuff in a dedicated news section' (Recode, 1 Apr. 2019) <https://www.recode.net/2019/4/1/18290330/facebook-news-tab-mark-zuckerberg-license-fee-axel-springer-mathias-dopfner>



Section 2

Further Analysis and International Comparison

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2.1 Paying for News and the Limits of Subscription

Richard Fletcher
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This year’s survey finds only a small increase in the numbers paying for any online news. However, growth in the number of paid subscribers for publications like the *New York Times*, the *FT*, and *Mediapart*, as well as the success of alternative models like the *Guardian’s* membership scheme, have demonstrated that reader revenues provide an alternative to the digital advertising most online news media have historically relied on – advertising that is primarily going to large platform companies.

Yet difficult challenges remain. Some in the news business worry that, even though subscriber numbers remain low by some standards, we might already be close to reaching an upper limit. Others fear the emergence of ‘subscription fatigue’, where people become frustrated by being asked to pay for multiple services separately. Will only the largest and most prominent news outlets survive, and how will they fare when forced to compete with entertainment services like Netflix and Spotify?

For those outside the news business, the issues are different. In a world of hard paywalls, will a sharp divide between those who are willing and able to pay for online news, and those who are not, create information inequalities? Will we start to see growing differences between the information-rich and the information-poor? In many ways these are questions about the future, but the data we have now can provide an indication of what might lie ahead.

THE MOVE TO ONGOING PAYMENTS

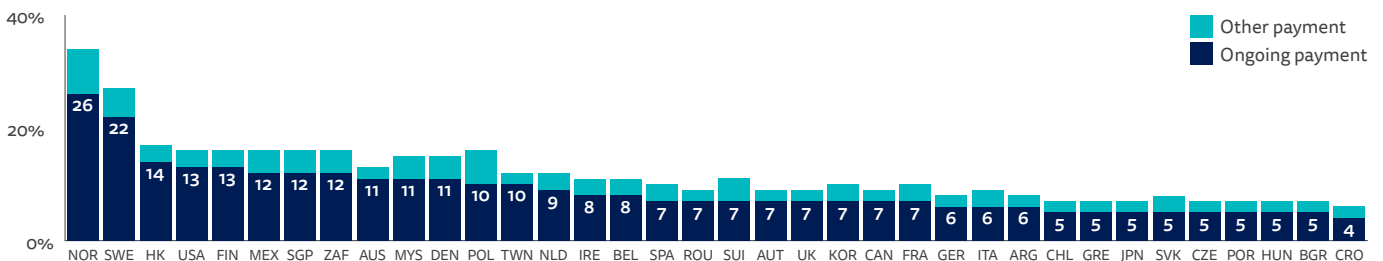
Although there has been only a small increase in the numbers paying for any online news, one positive development is that most payments are now ‘ongoing’ payments. This includes news access that is bundled with a subscription to the print product, or something different like cable or broadband, as well as straightforward subscriptions that allow people to go beyond the paywall. At the same time, one-off payments have stagnated, despite the introduction of micropayment platforms like Blendle.

This has been encouraging for many news organisations worried about their digital future. But it is important to keep in mind that the numbers of people paying for news subscriptions is still low – lower than the number that currently pay for print (either through single purchases or subscriptions) in many cases.

UPPER LIMITS FOR ONGOING SUBSCRIPTIONS

Why do only a minority pay for online news? In our 2017 report we explored the individual motivations, but willingness to pay for news is also determined by the structure of the news media environment. Our previous research has shown that the majority of online news in Europe – except for that offered by national legacy newspaper publishers – is free at the point of consumption (Cornia et al. 2017). If most online news is free, payment figures will likely always be low.

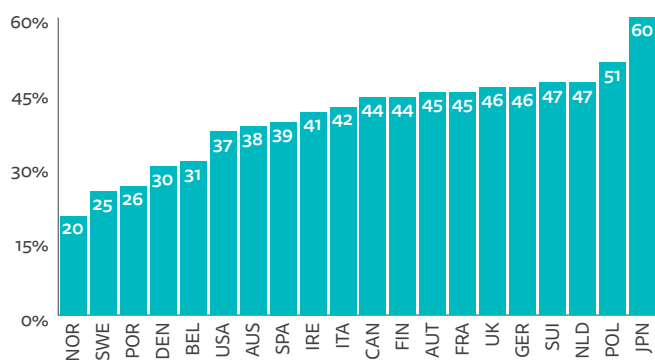
PROPORTION THAT MADE AN ONGOING NEWS PAYMENT IN THE LAST YEAR – SELECTED MARKETS



Q7ai. Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? Base: Total sample in each market = 2000, Taiwan = 1005. Note. Ongoing payment refers to digital-only payments, print-digital bundles, and getting access to digital news when paying for something else (eg broadband).

Another way of approaching this issue is to ask roughly how often people click on a link, expecting to read an article, and instead find that they are asked to pay for a subscription. The next chart shows the proportion of online news users that encounter a paywall less than once a week – a group that currently has little or no motivation to start paying. It is probably no coincidence that in countries like Norway and Sweden, where paying for news is most widespread, just 20% and 25% respectively do not regularly see paywalls for news. In much of Western Europe and the US, the figure is around 40%. In Japan, where most news is free due to the popularity of aggregators, 60% regularly consume news without bumping into a paywall.

PROPORTION THAT SAY THEY SEE A PAYWALL LESS THAN ONCE A WEEK – SELECTED MARKETS



Q7_SUBS3. How often do you click on a link, expecting to read an article, and find yourself asked to pay for a subscription instead? Base: Total sample in each country ≈ 2000.

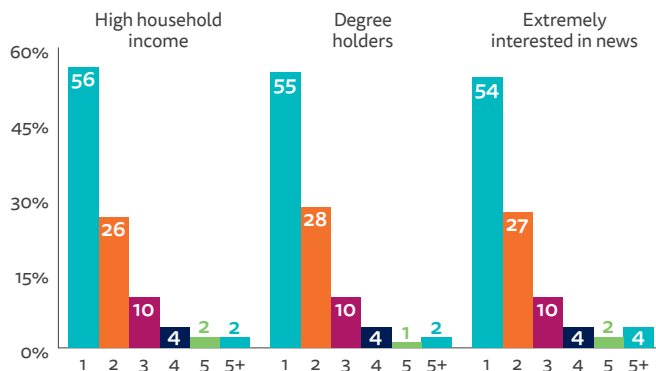
SUBSCRIPTION FATIGUE?

This gives a sense of the upper limit for the size of the group that will pay. But for some, the question of whether people will ever pay for an online news subscription has evolved into a question about how many subscriptions people will pay for. As stated in the Executive Summary, for the time being, the answer appears to be 'one'. The average (median) number of news subscriptions per person among those that pay is one in almost every country.

But perhaps more importantly, the average almost never exceeds one, regardless of what group you look at. Even among those who are most interested in news, the wealthiest, or the most educated, most people only pay money to one news organisation. This point matters because, depending on the way subscriptions are distributed among different publishers, it may mean that only a small handful of those that are currently available will be able to attract enough paying subscribers to survive.

It is also important to keep in mind that news is just one of many forms of online media that people are now being asked to subscribe to. Some worry that news is expected to compete with online video streaming like Netflix and Amazon Prime Video, music streaming services like Spotify, as well as a range of other subscription offers.

NUMBER OF NEWS ORGANISATIONS THAT PEOPLE REGULARLY PAY MONEY TO, BY INCOME, EDUCATION, AND INTEREST IN NEWS – SELECTED MARKETS

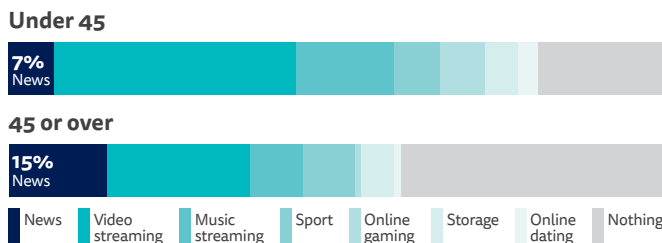


Q7_SUBS. You say you have paid a subscription or made an ongoing donation to a digital news service in the last year. How many different news providers do you regularly pay money to? Base: High household income/degree holders/extremely interested in news: 1222/1596/1274.

This is amplified by concerns over what some call 'subscription fatigue' – the idea that people are becoming frustrated with being asked to pay separately for lots of different services online. If subscription fatigue does start to set in, there are signs that news might be badly affected. We asked people what online media subscription they would pick if they could have only one for the next 12 months. Just 12% said they would pick news, compared to 28% that would choose a video streaming service like Netflix, and nearly one-third (31%) who would pick nothing. This means that, hypothetically, over three-quarters (76%) of people that currently pay for online news would stop paying if they would only have one online media subscription for the next year.

That number is even higher among younger people. They are less likely to say they would not pay for anything, but also less likely to say they would keep news specifically if forced to choose. Just 7% of under 45s would pick news over everything else for the next year, compared to 15% of those 45 and over. It is clear from the next chart that news is a more important part of the mix for older users, but also that younger people value a broader range of online media, including gaming and dating services.

IF YOU COULD ONLY HAVE ONE MEDIA SUBSCRIPTION FOR THE NEXT YEAR, WHICH WOULD YOU HAVE? – SELECTED MARKETS



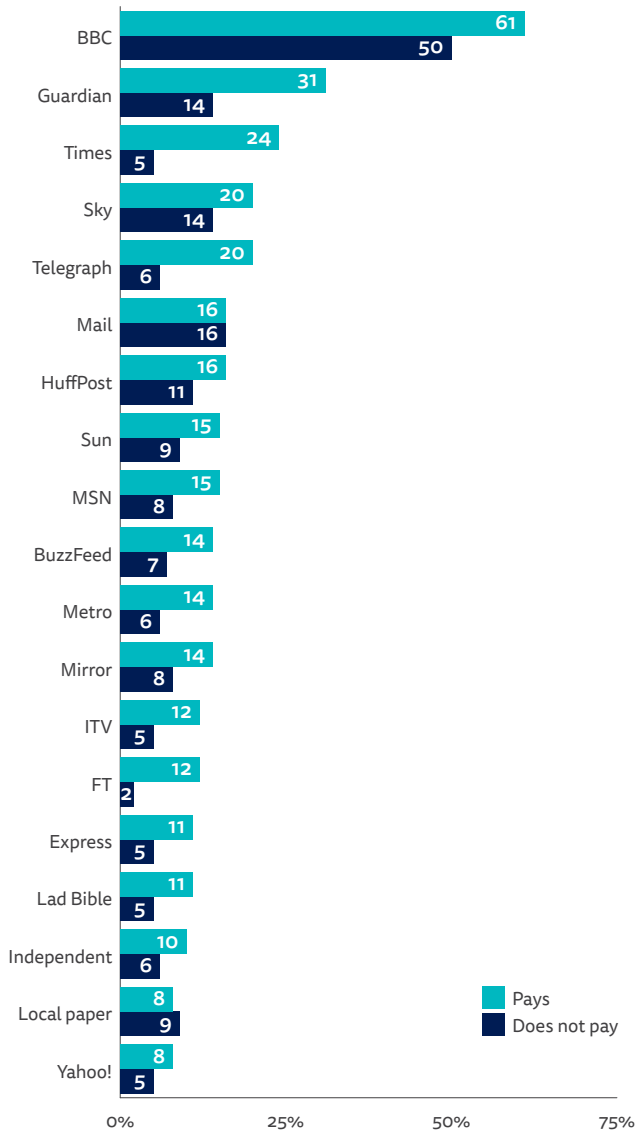
Q_VALUE_2019_A. If you could only have one for the next 12 months, which one of the following would you choose? Base: Under 45s/Over 45s: selected markets = 1760/2165.

PAYWALLS AND INFORMATION INEQUALITIES

Subscription fatigue, and the limits of pay models for news more broadly, will continue to pose a serious challenge for the news business. Meanwhile, others are concerned about whether the continued growth of pay models will create an unequal news environment, where those willing to pay for news get good-quality information, and those that are not will make do with news designed to harvest people's attention.

This is sometimes described using the metaphors like the 'two-tier news environment'. Our data show this can be a little misleading, however, because it implies a clear separation between paying users and those that rely on free sources. In fact, because they have much higher levels of interest in the news, paying users consume news from both sides of the paywall – and in most cases are heavier users of free sources than those who don't pay. The chart provides evidence of this pattern in the UK.

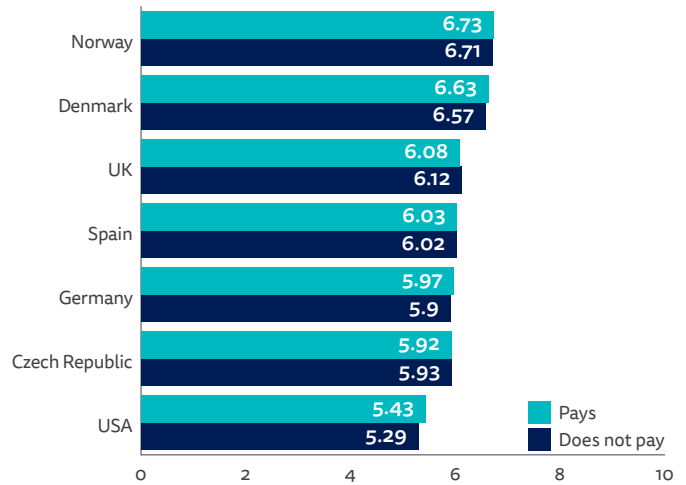
PROPORTION THAT USED EACH SOURCE OF ONLINE NEWS IN THE LAST WEEK – UK



Q5B. Which of the following brands have you used to access news online in the last week?
 Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? Base: Paid/did not pay for online news in the last year: UK = 174/1800.

Of course, it could still be the case that people who rely on free sources are on average consuming lower quality news. Making judgements about news quality is always challenging, but here we can use our brand trust scores (see Country Pages section) as an imperfect proxy in the absence of a widely agreed-upon alternative measure. If we compare the average brand trust score of the news diets of those who pay with those who don't, we see almost no differences – even across countries with very different media systems.

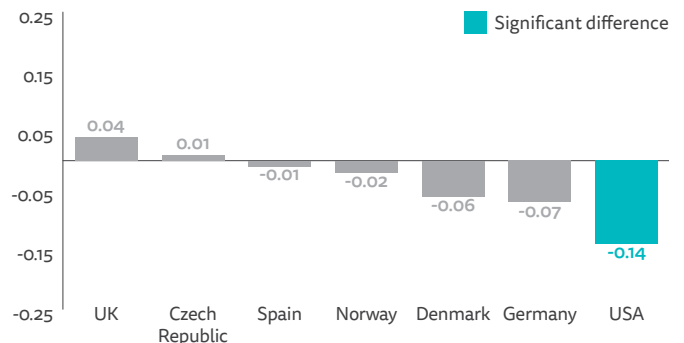
AVERAGE TRUST SCORES OF PEOPLE'S NEWS DIETS – SELECTED MARKETS



Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? Q6_2018_trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Paid/did not pay for online news in the last year: USA = 335/1572, Czech Republic = 152/1770, Germany = 160/1788, Spain = 214/1725, UK = 174/1800, Denmark = 303/1639, Norway = 696/1227.

This is partly because those that pay continue to consume online news from sources that most people do not trust. But it is also likely to be due to the fact that many countries – even those such as Norway where paywalls are common – still have trusted sources that are free at the point of consumption. Indeed, the most trusted news source in many European countries is the public broadcaster, which is often heavily used by payers and non-payers alike.

DIFFERENCE BETWEEN AVERAGE TRUST SCORES OF THOSE THAT PAY FOR NEWS AND THOSE THAT DO NOT – SELECTED MARKETS

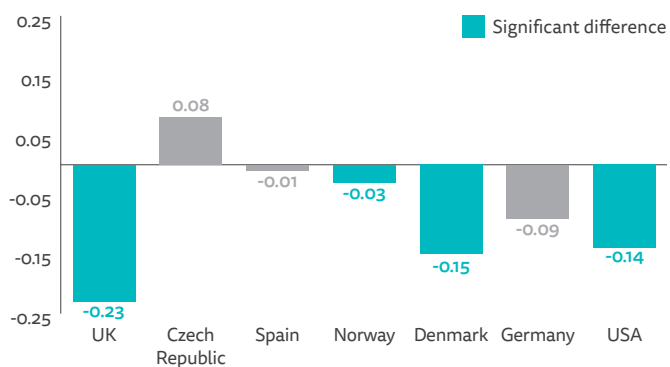


Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? Q6_2018_trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Paid/did not pay for online news in the last year: USA = 335/1572, Czech Republic = 152/1770, Germany = 160/1788, Spain = 214/1725, UK = 174/1800, Denmark = 303/1639, Norway = 696/1227.

This may be why the USA – which has relatively weak public service media – was the only country we analysed where the news diets of those that do not pay have on average a significantly lower trust score (-0.14 on the 0–10 scale) than for those who pay (grey shading indicates no significant difference).

Indeed, if we remove public service media from the analysis, we see that a significant gap emerges in Norway (-0.03), Denmark (-0.15), and, most noticeably of all, the UK (-0.23). This could be read to suggest that the reason we do not currently see large differences between the news diets of those who pay and those who don't is because they are smoothed out by the fact that many of those that don't pay can get trusted news from public service media. This suggests that, as paywalls become more commonplace, public service media will be especially important for keeping information inequalities low.

DIFFERENCE BETWEEN AVERAGE TRUST SCORES OF THOSE THAT PAY FOR NEWS AND THOSE THAT DO NOT (PUBLIC SERVICE MEDIA EXCLUDED) – SELECTED MARKETS



Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? **Q6_2018_trust.** How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Paid/did not pay for online news in the last year: USA = 335/1572, Czech Republic = 152/1770, Germany = 160/1788, Spain = 214/1725, UK = 174/1800, Denmark = 303/1639, Norway = 696/1227.

2.2 Groups and Private Networks – Time Well Spent?

Antonis Kalogeropoulos
 Research Fellow, Reuters Institute
 for the Study of Journalism

The number of people accessing news via social media is now relatively stable in most countries. However, the relationship between news and social media continues to evolve. Facebook has stated that private messaging, ephemeral stories, and small groups are now among the fastest growing areas of online communication, and has refocused its strategy on privacy and encryption.

Our own research shows that people are spending less time with relatively open networks like Facebook and more time with more private messaging applications like WhatsApp, Facebook Messenger, Viber, and Telegram. They are also using them more heavily for news. In this section, we explore this shift towards private spaces for news consumption and discussion, and the implications this has for publishers and for society.

PROPORTION THAT USE EACH MESSAGING APP FOR NEWS – SELECTED MARKETS

WhatsApp for news	Messenger for news	Viber for news
Brazil 53% (+5)	Greece 25% (+3)	Greece 17% (+3)
Malaysia 50% (-4)	Poland 22% (+9)	Bulgaria 16% (+2)
South Africa 49%	Belgium 12% (+4)	Croatia 13% (+1)
Hong Kong 41% (+3)	USA 9% (+2)	

Q12b. Which, if any, of the following have you used for news in the last week? Base: Total sample in each market = 2000.

CONTEXT COLLAPSE

Facebook CEO Mark Zuckerberg acknowledges that not everyone wants to reveal their secrets in the 'digital equivalent of the town square'. Across its networks Facebook is building features that facilitate more intimate conversations in smaller, private groups.¹⁵ Within Facebook itself, group discussions have been prioritised within the newsfeed, and the discovery of new groups has been improved.

These changes will likely alter the nature of political discussion online. Some academic research has found that political talk on private messaging apps has beneficial outcomes, such as increasing political participation (Vaccari and Valeriani 2018). Yet at the same time, investigations in India and Brazil have linked WhatsApp groups to the spread of political propaganda, misinformation, and hate speech.¹⁶ Others worry that the use of private groups might create echo chambers that reinforce existing views and further polarisation in society. In the light of these concerns we were keen to understand more about how Facebook and WhatsApp groups are being used – and more about the people who access them regularly.



Yellow Vest protests in France were in part co-ordinated through a series of private and public 'anger groups'

THE EXTENT OF GROUPS IN WHATSAPP AND FACEBOOK

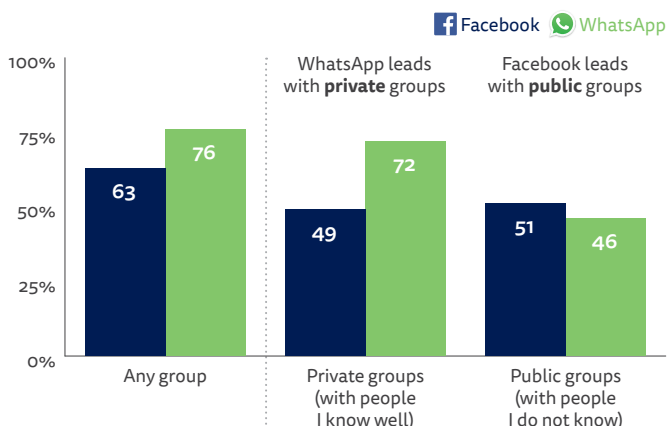
Looking at nine countries with different levels of social media activity – US, UK, Spain, Ireland, Turkey, Malaysia, Australia, Canada, and Brazil – we find that the majority of Facebook and WhatsApp users are members of one or more active groups. Two-thirds (63%) of Facebook users, and three-quarters (76%) of WhatsApp users, say they used a group during the month leading up in the survey.

About half of Facebook users (49%) and around three-quarters (72%) of WhatsApp users in these countries said they are part of groups with people they know well, such as friends, colleagues, and family. About half of Facebook and WhatsApp users (51% and 46% respectively) are active members of groups that mostly include people they do not know.

¹⁵ <https://www.facebook.com/notes/mark-zuckerberg/a-privacy-focused-vision-for-social-networking/10156700570096634/>

¹⁶ <https://uk.reuters.com/article/uk-brazil-election-whatsapp-explainer/facebook-whatsapp-flooded-with-fake-news-in-brazil-election-idUKKCN1MU0UZ>

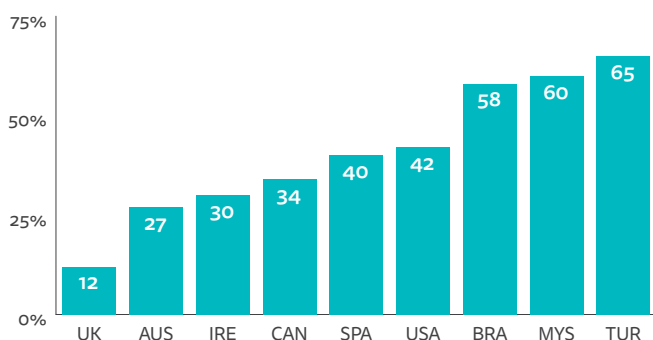
PROPORTION THAT USED A GROUP ON FACEBOOK OR WHATSAPP IN THE LAST MONTH – SELECTED MARKETS



Q12_2019_FB/WA. Facebook/WhatsApp allows you to set up, join, and participate in groups, where you can discuss news or related topics with like-minded people. Which, if any, of the following have you used in the past month on Facebook/WhatsApp itself? Base: Facebook/WhatsApp users: Nine countries = 12,975/9636. Note: This question was asked in USA, UK, Spain, Ireland, Turkey, Malaysia, Australia, Canada, and Brazil.

WhatsApp groups, as one might expect, are more focused on private conversation with friends, family, and work colleagues. By contrast, Facebook Groups tend to be more about sharing experiences with people we know less well. Having said that, it is clear that WhatsApp is used very differently across countries with two basic models. The majority of WhatsApp users in Turkey (65%), Spain (40%), Malaysia (60%), and Brazil (58%) use groups to interact with people they don't know. By contrast, only a minority of users in Australia (27%) and the UK (12%) seem prepared to use WhatsApp in this way. Countries like Brazil, with their bigger groups, seem to have been more prone to the spread of political misinformation and disinformation via WhatsApp.¹⁷

PROPORTION THAT USE WHATSAPP GROUPS WITH PEOPLE THEY DON'T KNOW – SELECTED MARKETS



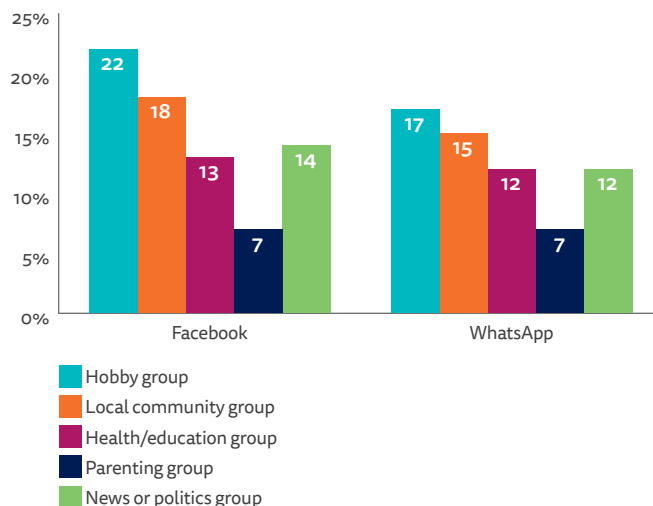
Q12_2019_WA. WhatsApp allows you to set up, join, and participate in groups, where you can discuss news or related topics with like-minded people. Which, if any, of the following have you used in the past month on WhatsApp itself. Base: WhatsApp users: USA = 185, UK = 1007, Spain = 1574, Ireland = 1196, Turkey = 1552, Malaysia = 1693, Australia = 435, Canada = 314, Brazil = 1680.

THE ROLE OF NEWS IN GROUPS

The vast majority of Facebook or WhatsApp groups do not cover news or politics. In both networks, our data indicate that the most popular groups tend to be set up to discuss shared hobbies or passions (22% of Facebook users and 17% of WhatsApp users), followed by local community groups (18% of Facebook users and 15% of WhatsApp users).

Other popular groups cover topics like health, education, and parenting. Groups set up to discuss news or politics are used only by a small proportion of users of these platforms in the UK and Spain (8% of Facebook and 2% of WhatsApp users) but these numbers do rise considerably in Turkey and Brazil.

PROPORTION OF FACEBOOK AND WHATSAPP USERS THAT ARE MEMBERS OF EACH GROUP – ALL NINE MARKETS



Country	Facebook groups for news/politics	WhatsApp groups for news/politics
Turkey	29%	21%
Brazil	22%	18%
Malaysia	17%	15%
USA	14%	10%
Spain	13%	8%
UK	8%	2%
Ireland	7%	4%
Canada	7%	8%
Australia	7%	6%

Q12_2019_FB/WA. Facebook/WhatsApp allows you to set up, join and participate in groups, where you can discuss news or related topics with like-minded people. Which, if any, of the following have you used in the past month on Facebook/WhatsApp itself. Base: Facebook/WhatsApp users: USA = 1356/185, UK = 1337/1007, Spain = 1450/1574, Ireland = 1300/1196, Turkey = 1479/1552, Malaysia = 1649/1693, Australia = 1426/435, Canada = 1449/314, Brazil = 1529/1680.

NEWS GROUP USERS TEND TO BE MORE PARTISAN

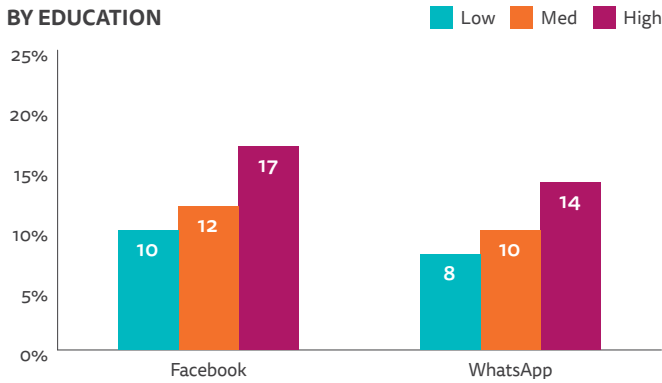
What are the demographic characteristics of those that join groups? In the end, people have to make a conscious decision to become a member of a group, and this is reflected in their user profile. Those that join Facebook or WhatsApp groups tend to be better educated and more politically committed, coming from the far-right or the far-left rather than from the political centre.

Other characteristics are more even. Men are slightly more likely to join a news group, with 16% of male Facebook users part of news or political groups, compared to 12% of female users, and the same is broadly true of WhatsApp.

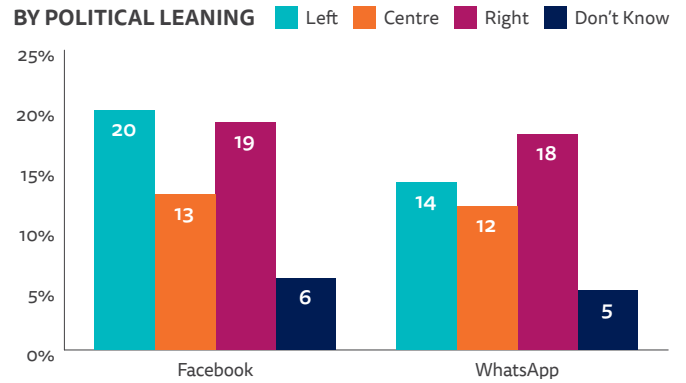
¹⁷ <https://www.theguardian.com/world/2018/oct/25/brazil-president-jair-bolsonaro-whatsapp-fake-news>

PROPORTION OF FACEBOOK AND WHATSAPP USERS THAT ARE MEMBERS OF NEWS/POLITICS GROUPS BY EDUCATION AND POLITICAL LEANING – SELECTED MARKETS

BY EDUCATION



BY POLITICAL LEANING



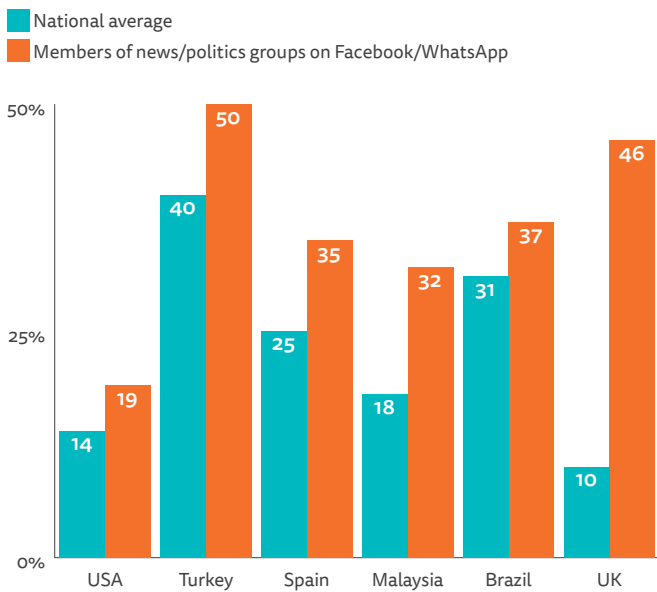
Q12_2019_FB/WA. Facebook/WhatsApp allows you to set up, join and participate in groups, where you can discuss news or related topics with like-minded people. Which, if any, of the following have you used in the past month on Facebook/WhatsApp itself? **Q1F.** Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? Education. What is your highest level of education? Base: Low/medium/highly educated and left/centre/right/don't know Facebook/WhatsApp users: selected countries = 1751/4783/6441 and 1164/2994/5478 2304/6986/1921/1764 and 1688/5443/1273/1232.

A key characteristic that distinguishes news group users from the wider population in each country is that they are more likely to say they trust the news they get from social media. In the UK, around half of either WhatsApp or Facebook news groups trust news from social (46%) compared with just 10% of the whole sample. We also find large differences between the national average and the users of groups related to news or politics in Brazil, Malaysia, and Spain. This suggests that, for the minority that use them, the news that these groups serve up is an important part of their overall news diet.

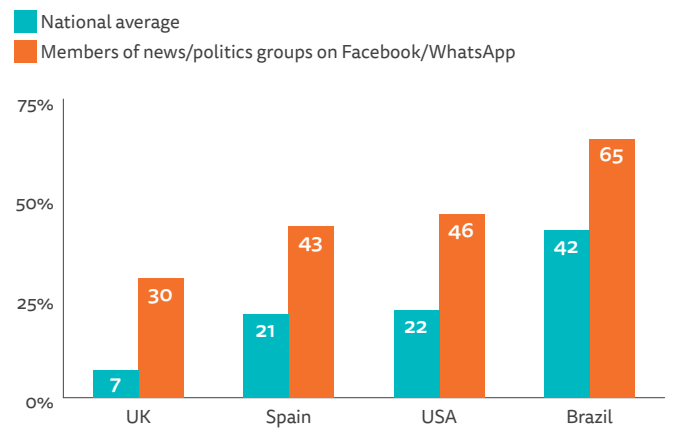
News group users also tend to have news diets that are quite distinctive. They are significantly more likely to use an alternative or partisan news source than those who do not use groups for news. In the UK almost a third (30%) of those participating in news groups within Facebook or WhatsApp use alternative or partisan brands, compared with just 7% for the overall sample.

Even in Brazil, where there is higher use of alternative and partisan news brands (42% on a weekly basis), we can see that their reach is higher among members of Facebook and WhatsApp news groups (65%). However, it is also clear that news group users also rely on more mainstream outlets too. On average they use 7.1 online news sources in a typical week – around double the average number used by the whole sample across these nine countries (3.6).

PROPORTION THAT TRUSTS MOST NEWS FROM SOCIAL MEDIA MOST OF THE TIME – SELECTED MARKETS



PROPORTION THAT USED A PARTISAN OR ALTERNATIVE WEBSITE IN THE LAST WEEK – SELECTED MARKETS

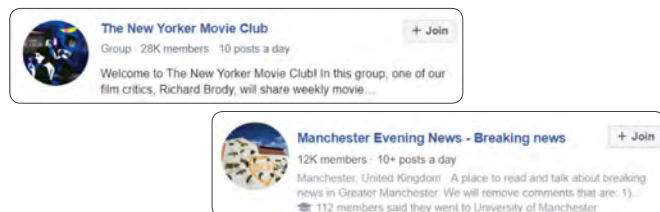


Q12_2019_FB/WA. Facebook/WhatsApp allows you to set up, join, and participate in groups, where you can discuss news or related topics with like-minded people. Which, if any, of the following have you used in the past month on Facebook/WhatsApp itself? **Q6_2018_2.** Please indicate your level of agreement with the following statements: I think I can trust news in social media most of the time. Base: Total sample/member of news/politics groups on Facebook or WhatsApp: UK = 2023/125, USA = 2012/197, Spain = 2005/243, Brazil = 2013/477, Turkey = 2074/549, Malaysia = 2101/380.

Q12_2019_FB/WA. Facebook/WhatsApp allows you to set up, join, and participate in groups, where you can discuss news or related topics with like-minded people. Which, if any, of the following have you used in the past month on Facebook/WhatsApp itself? **Q5c_2018_1/2.** In recent years a number of online news sites have emerged with their content often distributed via social media. Which, if any, of the following have you heard of/used in the last week? Base: Total sample/member of news/politics groups on Facebook or WhatsApp: UK = 2023/125, USA = 2012/197, Spain = 2005/243, Brazil = 2013/477.

OPPORTUNITIES FOR PUBLISHERS

As groups have become more relevant, journalists have started to use them for sourcing and distributing stories. In authoritarian countries – where the traditional news media are often tightly controlled – journalists have used private groups in messaging apps to spread news about protests to key influencers.¹⁸ Condé Nast has invested in private Facebook groups for many of its publications – including the New Yorker Movie Club, where some 28,000 members discuss films with the magazine’s critics.



Spaceship Media is a company in the US that moderates a number of ‘secret’ Facebook groups where strangers are invited to share thoughts and experiences about current affairs and broader topics – engaging in what they call ‘dialogue journalism’.¹⁹

Overall, we find that most active users of groups on Facebook and WhatsApp are not members of groups set up to discuss politics or news. Those who do are more likely to be male, highly educated, and partisan. They are also more likely to trust news they get from social media, and more likely to use many different news sources – including those that are alternative or partisan.

While these news diets may not be directly linked to their participation in groups, it is possible that regular interaction with like-minded people could play a role in reinforcing strongly held views. Lastly it should be noted that our analysis is focused on active users of groups set up to discuss politics or news. However, discussion around news and politics also happens regularly in groups about health, parenting, or local communities.

¹⁸ https://www.cjr.org/tow_center_reports/foreign_correspondents_chat_apps_unrest.php

¹⁹ <https://medium.com/@markfrankel29/journalists-have-an-open-invitation-to-an-interesting-and-under-used-beat-5c3d739e16ae>

2.3 The Rise of Populism and the Consequences for News and Media Use

Richard Fletcher
 Research Fellow, Reuters Institute
 for the Study of Journalism

The political landscape of many Western countries is changing. As long-standing political parties fade, populists make significant gains at the ballot box – even taking power in some cases. In response, people have started to search for causes and, as is often the case, some have looked to the influence of the news media.

Understanding the influence of the news media on people’s political attitudes is far from easy, and we should rarely expect to find straightforward causal links. Nonetheless, a useful first step is to build a better understanding of how different groups within society access news.

In this section we will explore whether people with populist attitudes in Europe and the US have different media habits to the rest of the population.²⁰ In particular, we will describe how they arrive at news, how they interact with it, and what outlets they rely on. We will also show how newer, more partisan, and alternative news outlets are carving out audiences from the gaps left by established news media.

DEFINING POPULISM

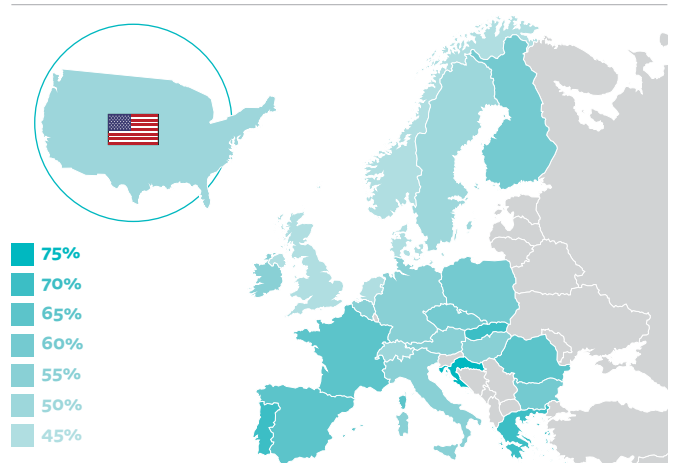
Inspired by recent cross-national research, we identified those with populist attitudes based on their belief in: (i) the existence of a ‘bad’ elite and the ‘virtuous’ people – two separate groups with competing interests, and (ii) the ultimate sovereignty of the will of the people (Pew Center 2018). We tapped the first dimension by asking people whether they agree (on a five-point scale ranging from ‘strongly disagree’ to ‘strongly agree’) that ‘most elected officials don’t care what people like me think’, and the second by asking whether ‘the people should be asked whenever important decisions are taken’. For the purposes of the analysis here, those that selected ‘tend to agree’ or ‘strongly agree’ for both of these statements were placed in the ‘populist attitudes’ group, with all other respondents placed in the ‘non-populist attitudes’ group.

People have different views about what populism is. Some argue that populism is nothing more than a style of communication. Others see populism as a ‘thin’ ideology, best understood in combination with more comprehensive belief systems such as left–right (Mudde 2004). We will turn to this later, but given that those with populist attitudes do appear to have distinct media habits that are relatively consistent across countries, we will proceed with this simple distinction for now.

POPULIST ATTITUDES IN DIFFERENT COUNTRIES

The proportion of the online population that agreed to both statements varies from country to country. Figures range from just under half in the Netherlands (49%), the UK (45%), Norway (49%), and Denmark (42%), to around three-quarters in Slovakia (71%), Greece (71%), Portugal (73%), and Croatia (77%). In the US, 54% of those surveyed agreed with both of the above statements.

PROPORTION WITH POPULIST ATTITUDES – SELECTED MARKETS



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. Base: Total sample in each country = 2000.

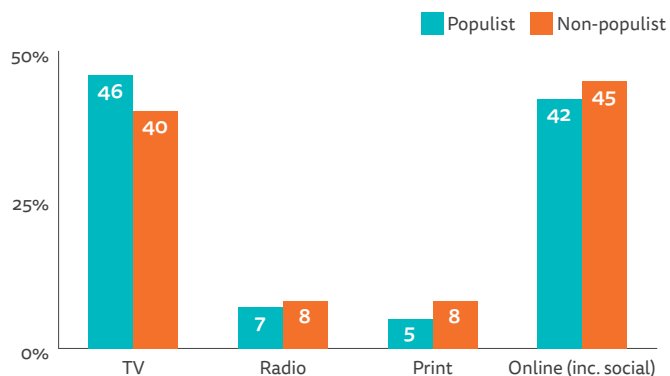
²⁰ Our data comes from the following 23 European countries: UK, Germany, France, Italy, Spain, Portugal, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Hungary, Slovakia, Czech Republic, Poland, Bulgaria, Romania, Croatia, and Greece.

This suggests that populist attitudes are less widespread in Northern and Western European countries than in Eastern and Southern Europe. In almost every country we analysed, populist attitudes are more common among those either in the older age groups, with lower incomes, or with lower levels of formal education.

THOSE WITH POPULIST ATTITUDES PREFER TELEVISION OVER ONLINE NEWS

Despite concern that the rise of populism is being driven by online media, when it comes to news, those with populist attitudes prefer offline news use – especially TV. Of those with populist attitudes, 46% say that television is their main source of news, compared to 40% of those without. This preference is stronger for commercial television outlets, but weaker for public service broadcasters. Indeed, public service media have been a particular target for negative attacks from populists as their influence has grown in recent years (Cushion 2018).

MAIN SOURCE OF NEWS BY ATTITUDES – EUROPE AND THE USA

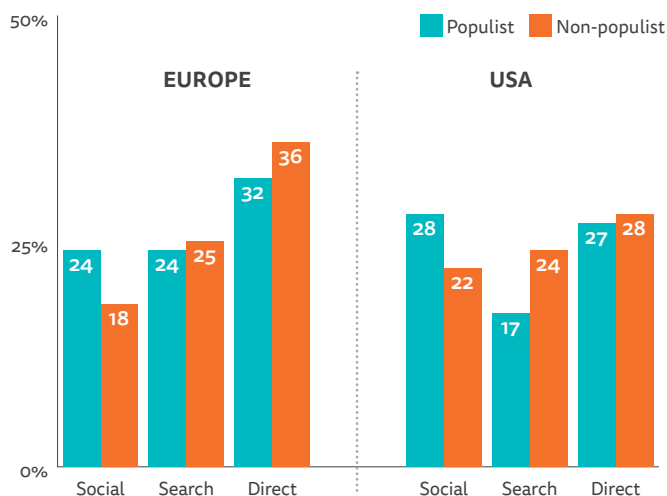


Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. **Q4.** You say you've used these sources of news in the last week, which would you say is your MAIN source of news? Base: People with populist/non-populist attitudes in Europe and USA = 28,049/18,952.

THOSE WITH POPULIST ATTITUDES ARE HEAVY FACEBOOK NEWS USERS

Nonetheless, online news access is clearly important for those with populist attitudes, as well as for those without. If we drill deeper and look at the different ways people arrive at news online, we see many similarities between these groups – but also key differences. In Europe, directly accessing a branded website or app is the single most popular way of arriving at online news for those with populist attitudes (31%) and for those without (35%). However, those with populist attitudes have a stronger preference for social media (24% compared to 19%). In the US, social media ties with direct access as the main way of arriving at news for those with populist attitudes. There's also no clear preference for direct access among those without populist attitudes.

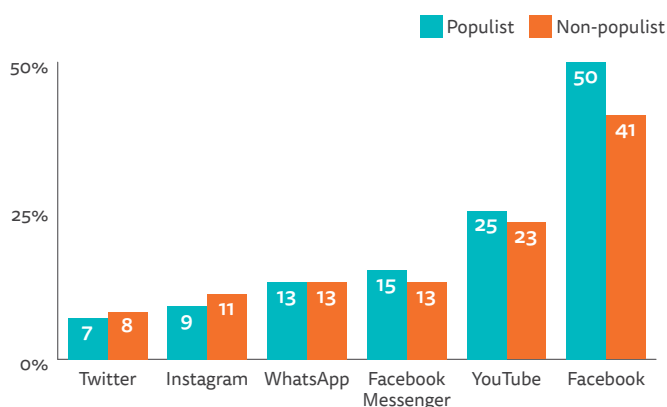
MAIN GATEWAY TO ONLINE NEWS BY ATTITUDES – EUROPE AND THE USA



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. **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: People with populist/non-populist attitudes who used an online news gateway in the last week: Europe = 25,559/17,038, USA = 1000/763.

The preference for social media among those with populist attitudes is largely due to a preference for Facebook. This group is more likely to use Facebook as a source of news, but no more likely to use other social networks like Twitter. Furthermore, our data also suggest that this gap may be growing. As a group, those with populist attitudes say they have started spending more time on Facebook in the past 12 months, whereas everyone else says they are spending less. This pattern makes sense if we think of Facebook as a network that primarily surfaces content based on the preferences of ordinary citizens, as opposed to Twitter, which many see as being dominated by elite voices, the established news media, and a relatively small and generally more privileged user base.

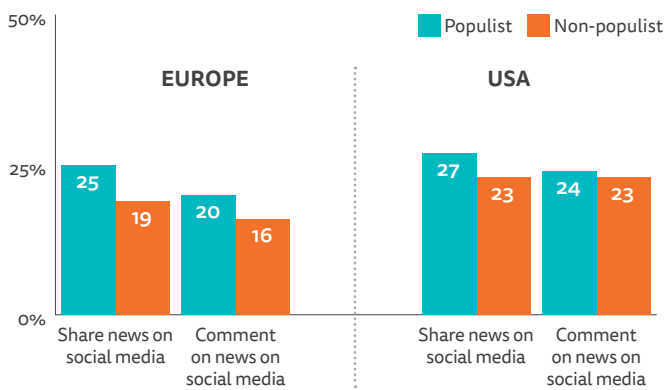
PROPORTION THAT USE EACH SOCIAL NETWORK FOR NEWS BY ATTITUDES – EUROPE AND THE USA



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. **Q12B.** Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Base: People with populist/non-populist attitudes in Europe and USA = 28,049/18,952.

People with populist attitudes are also more likely to share and comment on news more when using social networks. Other studies have found that populist parties tend to be more active on Facebook – posting more, and generating more interactions with their content than established parties.²¹ These trends could be combining to create a social media environment where populist ideas and perspectives are over-represented – however it is not possible to conclude this from our data alone. So far, there’s little evidence that the growth of populism is being primarily driven by the popularity of social media – but it may be the case that people’s discontent with the established media is prompting people to rely more on social media for news (Schulz 2019).

PROPORTION THAT INTERACT WITH NEWS ON SOCIAL MEDIA BY ATTITUDES – EUROPE AND USA



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. **Q13.** During an average week in which, if any, of the following ways do you share or participate in news coverage? Base: People with populist/non-populist attitudes: Europe = 27,539/18,765, USA = 1125/875.

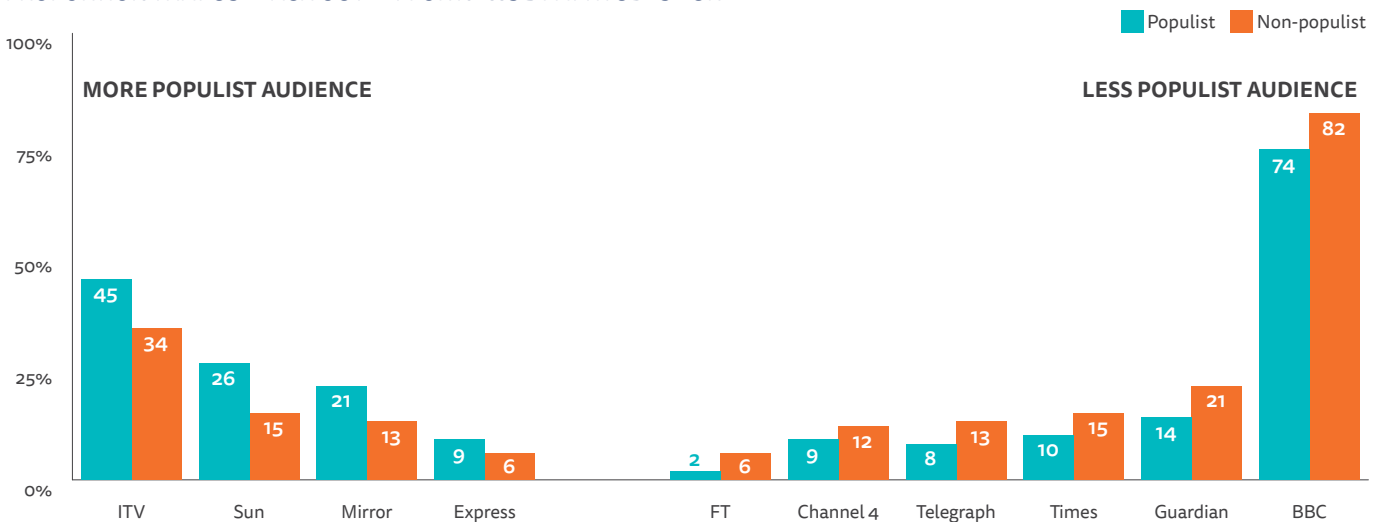
POPULIST ATTITUDES AND NEWS OUTLET SELECTION

Our data also show that those with populist attitudes gravitate towards different news outlets, and thus have different news diets. If we take our cross-platform data (online use combined with offline use) from the UK as an example, we can see that some outlets are more widely used by those with populist attitudes than those without, and vice versa. People who hold populist views are significantly more likely to use ITV, the *Mirror*, the *Express*, and the *Sun*, but those without populist attitudes are more likely to rely on the *FT*, Channel 4, the *Telegraph*, *The Times*, the *Guardian*, and the BBC. Audiences for other brands – including the *Mail* and Sky – are roughly evenly split.

This pattern reflects a preference for commercial TV and tabloid newspapers among those with populist attitudes. Those without, on the other hand, seem to prefer broadsheet newspaper brands and public service media. Some digital-born sites like HuffPost and BuzzFeed tend to have news audiences that are fairly evenly split. Other outlets however – particularly those we have previously referred to as alternative or partisan outlets – are often favoured by those with populist views, in addition to having audiences with a heavy left-right skew.

It is also noticeable how populist preferences cut across left-right divides, highlighting new dimensions along which news audiences can be segmented. For example, those with populist attitudes exhibit a clear preference for both the right-leaning *Sun* and the left-leaning *Mirror*. Similarly, those without populist attitudes have a preference for both the *Guardian* and the *Telegraph* – two newspapers with very different editorial lines.

PROPORTION THAT USE EACH OUTLET FOR NEWS BY ATTITUDES – UK



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. **Q5B.** Which of the following brands have you used to access news online in the last week? Base: People with populist/non-populist attitudes: UK = 875/1148.

²¹ <https://www.politico.eu/article/europe-populists-european-election-alternative-for-deutschland-rassemblement-national-facebook/>

POPULISM AND NEWS AUDIENCE POLARISATION

Given these different usage patterns, we might wonder whether news audiences are polarised according to populist attitudes. In other words, to what extent do those with populist attitudes consume news from one set of outlets, and those without from another?

In our 2017 report, we explored how individual left-right preferences created a large degree of news audience polarisation in some countries, but not in others. We saw that in the US, the UK, and in Southern and Eastern Europe, audiences for news outlets are often heavily right- or left-leaning – with relatively few outlets able to attract people of different persuasions. Whereas in other countries – typically those in Western and Northern Europe – news outlets had mixed audiences made up of centrists, those on the left, and those on the right.

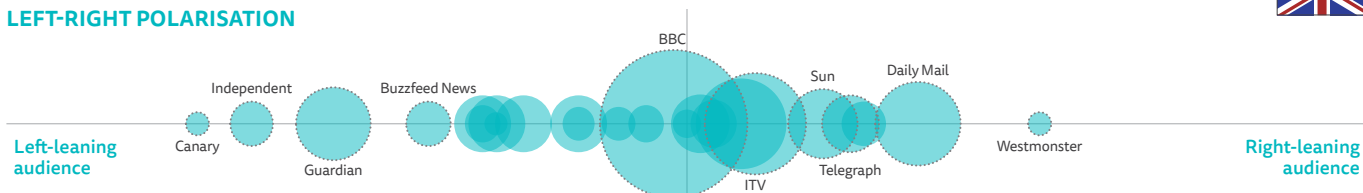
In the charts below, we compare the degree to which countries have strong left- or right-leaning audiences, with the degree to which they have strong populist or non-populist audiences. In the UK and the US – as in most countries – the extent of left-right polarisation is greater than the level of populist polarisation. The UK – with its prominent tabloid press – is home to outlets with relatively large populist audiences, but given that some outlets have audiences with a higher proportion of left- or right-leaning people (indicated by their distance from the centre of the map), it's arguably true that left-right preferences are more important to people when deciding what news outlets to use. This is even more so in the US, where the degree of left-right polarisation is particularly strong.

In Germany, we see a different pattern. Here, the level of populist news audience polarisation is broadly similar to the US and the UK, but because the degree of left-right polarisation is low due to a general reluctance from the German news media to adopt partisan positions, populist attitudes have become more important to people when deciding what outlets to use.

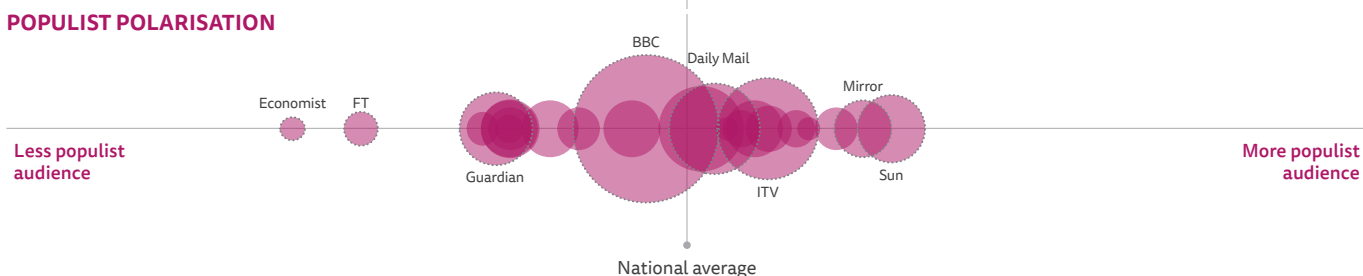
CROSS-PLATFORM AUDIENCE MAP – UK



LEFT-RIGHT POLARISATION



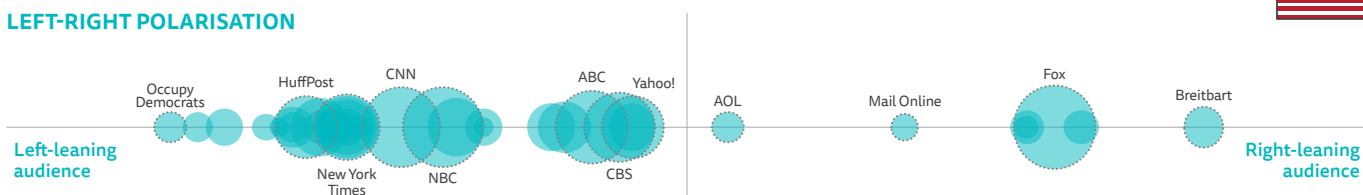
POPULIST POLARISATION



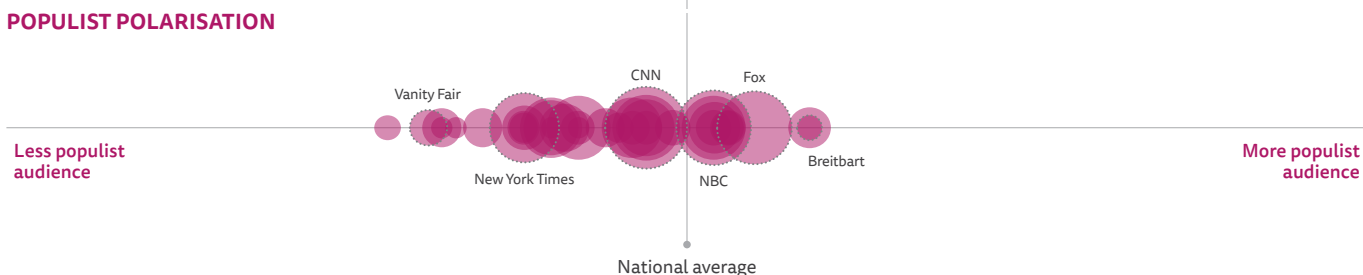
CROSS-PLATFORM AUDIENCE MAP – USA



LEFT-RIGHT POLARISATION



POPULIST POLARISATION

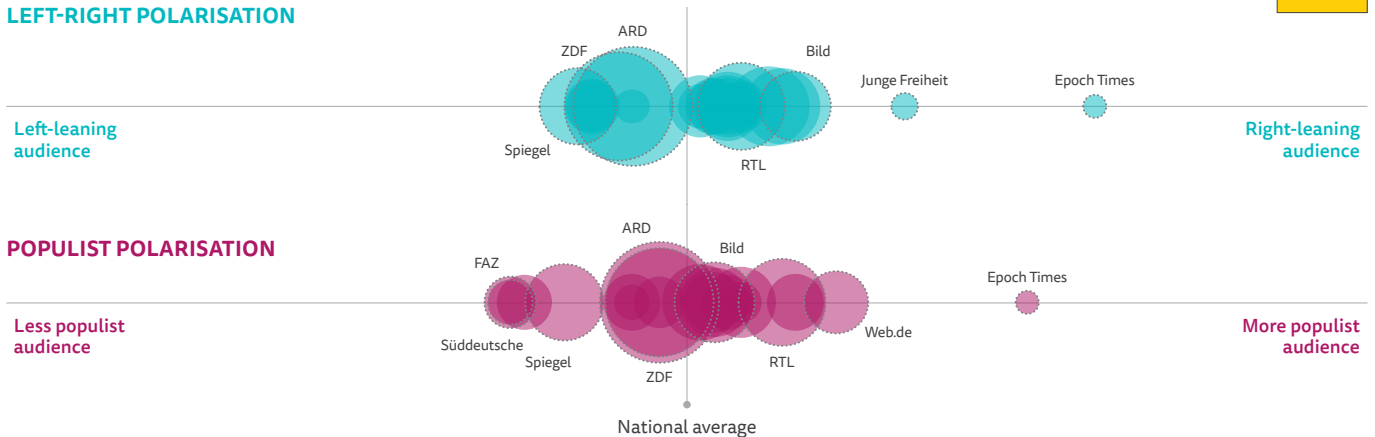


Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? Q5A/B. Which of the following brands have you used to access news offline/online in the last week? Base: Total sample: UK = 2023, USA = 2012.

CROSS-PLATFORM AUDIENCE MAP – GERMANY



LEFT-RIGHT POLARISATION



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. 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? Q5A/B. Which of the following brands have you used to access news offline/online in the last week? Base: Total sample: Germany = 2022.

MAPPING NEWS AUDIENCES ALONG TWO DIMENSIONS

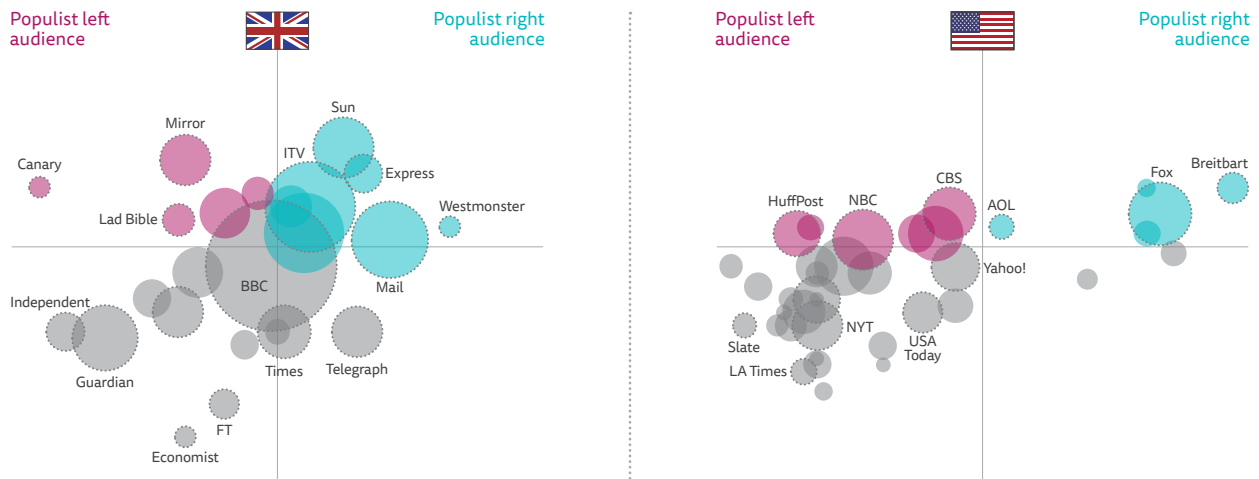
Although some assume populism to be closely aligned with the right, scholars tend to see populism as a thin ideology that can be combined with both left- and right-wing views. Within each country we can essentially merge the above maps to identify outlets with populist left or populist right audiences.

When we do this, a number of interesting patterns emerge. The position of each outlet along the horizontal axis indicates whether it has a left-leaning or right-leaning audience, with the distance from the centre indicating the strength of the skew. The position on the vertical axis indicates whether the outlet has a populist audience. The higher the outlet, the more its audience is skewed towards those with populist attitudes. Outlets with populist-left audiences are coloured red, and outlets with populist right audiences are coloured blue.

The US and the UK both contain a mixture of outlets with populist left and populist right audiences. The *Mirror*, for example, clearly has an audience that is predominantly made up of people who self-identify on the left, and who also hold populist attitudes. Readers of the *Sun* also tend to hold populist attitudes, but self-identify on the right.

In the US, though there are some outlets with populist audiences – such as Fox and HuffPost – it is also clear that the majority of outlets have audiences that are predominantly non-populist left, such as the *New York Times*. It is also clear that none of the outlets we examined in the US have audiences that are as skewed towards populists as in the UK. It may be that the inability or unwillingness of the established news media in the US to connect with those with populist attitudes has created a 'populist vacuum' – which may explain why many turn to social media and talk radio for news and information.

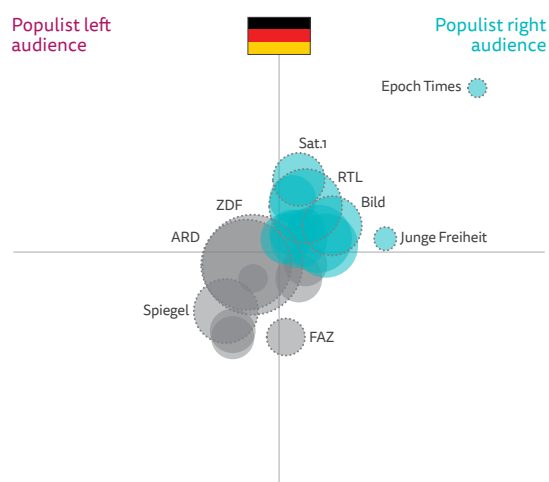
CROSS-PLATFORM AUDIENCE MAP – UK AND USA



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. 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? Q5A/B. Which of the following brands have you used to access news offline/online in the last week? Base: Total sample: UK = 2023, USA = 2012.

Not every country has this relatively even balance between populist left and populist right audiences. In Germany, we did not find any outlets with a populist left audience in our data. However, a considerable number of outlets have populist right audiences, particularly commercial television channels like Sat.1 and RTL. In Spain we see the opposite. Here, there are several outlets with populist left audiences, but only a handful on the right. It is perhaps no coincidence that Spain has also seen one of the strongest populist left political movements in recent years, though the populist right did well in 2019 elections.

CROSS-PLATFORM AUDIENCE MAP – GERMANY AND SPAIN

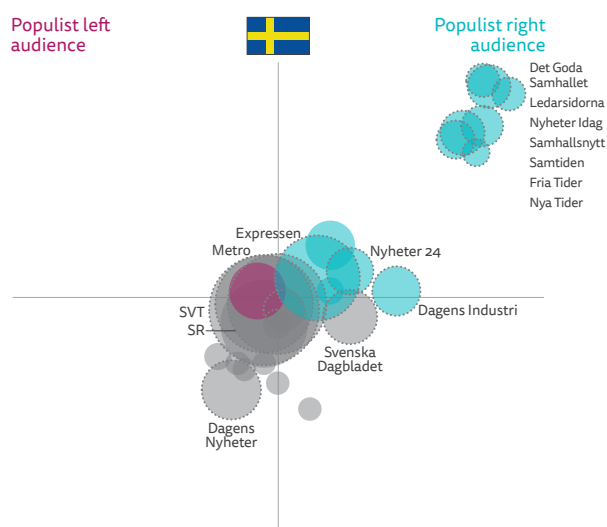


Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. **Q1F.** Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q5A/B.** Which of the following brands have you used to access news offline/online in the last week? Base: Total sample: Germany = 2022, Spain = 2005.

The maps we have shown so far also contain partisan and alternative news websites – such as the Canary in the UK and Breitbart in the US. These outlets usually have very left- or right-leaning audiences, but as is clear from the maps, they often have very populist audiences as well. Breitbart has the most populist audience in our US dataset, and the Canary's audience is also more likely to hold populist views.

Sweden contains some extreme examples of this phenomenon. Outlets like Fria Tider are used by around 10% of the online population, and have audiences that are heavily skewed towards those that both self-identify on the right and hold populist views. These outlets are sometimes understood as anti-immigration, but are also critical of political elites and the criminal justice system (Nygaard 2019). Their tone and style of coverage is a clear departure from the norms that govern the established television and newspaper outlets in Sweden.

CROSS-PLATFORM AUDIENCE MAP – SWEDEN

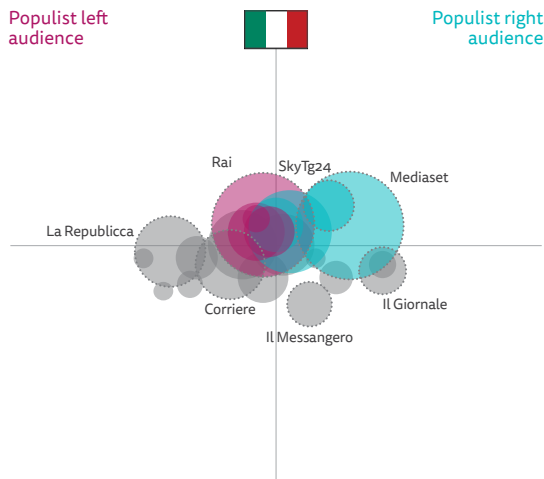
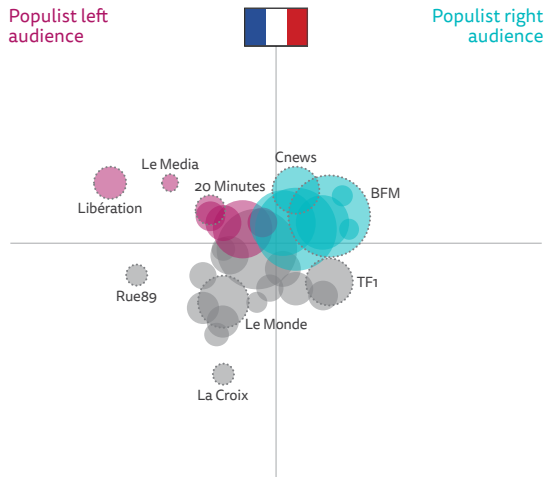


Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. **Q1F.** Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q5A/B.** Which of the following brands have you used to access news offline/online in the last week? Base: Total sample: Sweden = 2007.

In France and Italy, perhaps the most notable feature of the maps is that the most popular outlets also have a higher than average number of people with populist attitudes in their audience. These are typically commercial television channels, again highlighting the link between populist attitudes and seeing TV as the main source of news.

We have not fully explored the links between populist attitudes and trust this year. But our data do show less of a trust gap between those with populist attitudes and those without populist attitudes in countries where the most popular news outlets have populist audiences. However, in countries where populist outlets are less prominent – often because public service media are dominant – populists are considerably less likely to think that they can trust most news most of the time. In short, people who do not find any news media that reflect their attitudes often trust all news media less.

CROSS-PLATFORM AUDIENCE MAP – FRANCE AND ITALY



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/ Most elected officials don't care what people like me think. **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? **Q5A/B.** Which of the following brands have you used to access news offline/online in the last week? Base: Total sample: France = 2005, Italy = 2006.

It has become fashionable to dismiss left–right as an outdated concept that no longer explains people’s beliefs. But when it comes to news use, it is still able to explain a lot in both Europe and the US. Populism clearly matters too, but is best understood in combination with left–right self-identification.

A key question for publishers is how they will understand their own position within this two-dimensional space, especially as new partisan and alternative outlets carve out audiences from the spaces they have left vacant. A key question for public debate concerns what will happen if a significant minority is unable to find some, if any, established news outlets that reflect their attitudes, and instead turns to alternative and partisan outlets, and social media.

2.4 What do People Think about the News Media?

Antonis Kalogeropoulos and Richard Fletcher
Research Fellows, Reuters Institute
for the Study of Journalism

The news media rely on their audience both for their public importance and for their economic sustainability. No matter how good reporting may be, if people do not value it, it is unlikely to have a significant impact on public opinion or public knowledge. Similarly, if people find news disappointing, no matter how proud journalists may be of their work, people might be unwilling to pay for it as a commercial product or as a public service. They may also be reluctant to back the news media if political leaders try to crack down on them or intimidate them.

This year we dug a little deeper into people's attitudes towards news media using a series of questions designed to explore how well they thought they were performing. More specifically, we asked people whether they think the news media fulfil their watchdog role (do the news media monitor and scrutinise political and business leaders?), whether the news media pick relevant subjects, whether they adopt the right tone (are they too negative?), whether they keep the people up to date, and – last – whether they help them understand current events.²²

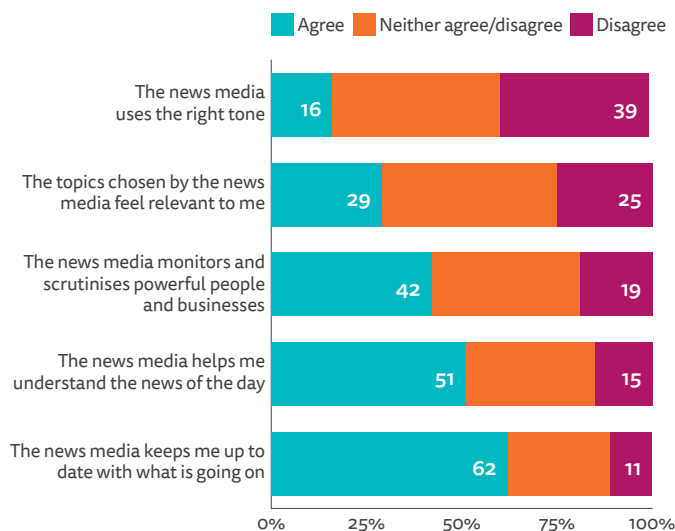
These are all things that the news media generally strive to do well. Many journalists would likely see them as being at the very core of their professional mission – a mission that they would argue the news media delivers on uniquely well. But what does the public think?

NEWS MEDIA DO WELL AT KEEPING PEOPLE UP TO DATE

In the Executive Summary we saw that, across all countries, most people agree that the news media keep them up to date with what's happening (62%), and that they help them understand current events (51%). But we should keep in mind that there is a significant minority (10–15%) that completely disagree that the news media help them in this regard – and perhaps equally concerning, around one-third who neither agree nor disagree.

Evaluations of the media along other dimensions tend to be more negative. Under half (42%) agree with the proposition that the news media monitor and scrutinise the powerful, only 29% agree that the news media cover topics that are relevant to them, and just 16% think that the news media use the right tone. Four in ten (39%) think that the news media are too negative. However, it is important to point out that many people do not have a strong view about this, with almost half (44%) selecting neither agree nor disagree.

PROPORTION THAT AGREED WITH EACH ATTITUDE TOWARDS THE NEWS – ALL MARKETS



Q15_2019_1/2/3/4/5. Please indicate your level of agreement with the following statements: The news media monitor and scrutinise powerful people and businesses/The topics chosen by the news media do not feel relevant to me/The news media often take too negative view of events/The news media keep me up to date with what's going on/The news media help me understand the news of the day. Base: Total sample = 75,749.

²² Throughout this chapter, and unlike the Executive Summary, we reversed coded responses for the statements 'the topics chosen by the news media do not feel relevant to me' and 'the news media often take too negative view of events', and renamed them 'the topics chosen by the news media feel relevant to me' and 'use the right tone' for better readability and comparability.

ATTITUDES IN DIFFERENT COUNTRIES

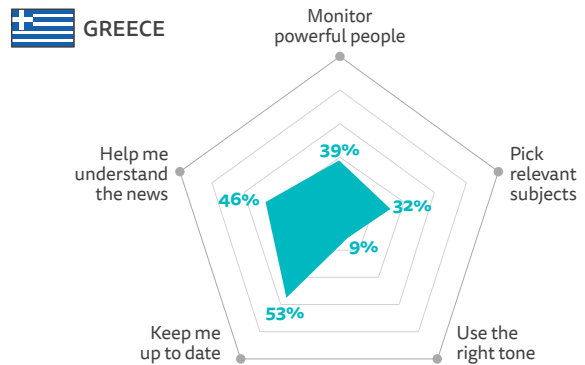
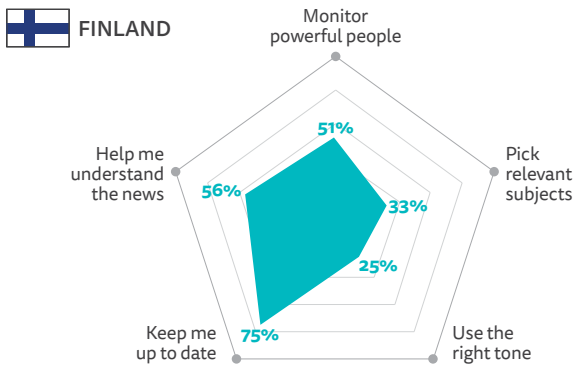
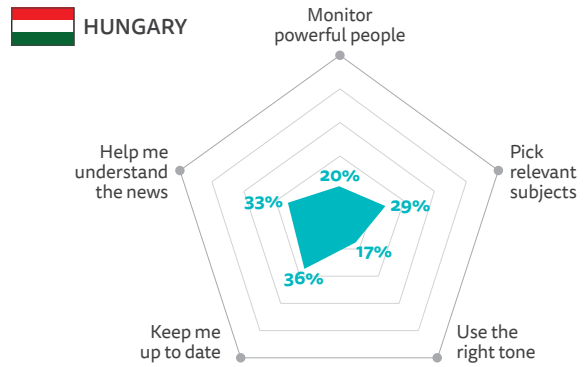
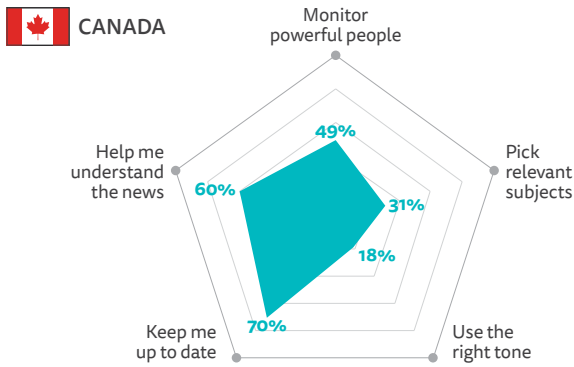
These aggregate numbers can hide large national differences. Below we use a series of radar charts to display the differences between two countries where respondents have relatively positive attitudes towards the news media (Finland and Canada), and two countries where people are much more negative (Greece and Hungary). In Finland and Canada, roughly half of respondents think that the media do a good job in monitoring

powerful people and helping them understand news, whereas in Hungary only one-fifth of respondents (20%) think that the news media fulfil their watchdog role, and a third (33%) that they help them understand the news.

However, even among these edge cases, we find consistently low approval of the news media's tone. Only 9% thinks that the news media uses the right tone (in terms of negativity) in Greece, compared to 25% in Finland.

PROPORTION THAT AGREED WITH EACH ATTITUDE TOWARDS THE NEWS – SELECTED MARKETS

The news media in my country:



Q15, 2019_1/2/3/4/5. Please indicate your level of agreement with the following statements: The news media monitor and scrutinise powerful people and businesses/The topics chosen by the news media do not feel relevant to me/The news media often take too negative view of events/The news media keep me up to date with what's going on/The news media help me understand the news of the day. Base: Total sample: Canada = 2055, Hungary = 2007, Finland = 2009, Greece = 2018.

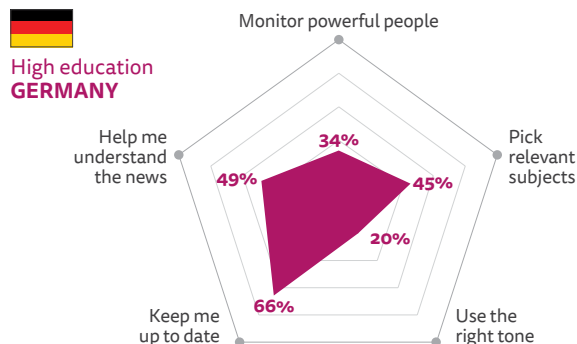
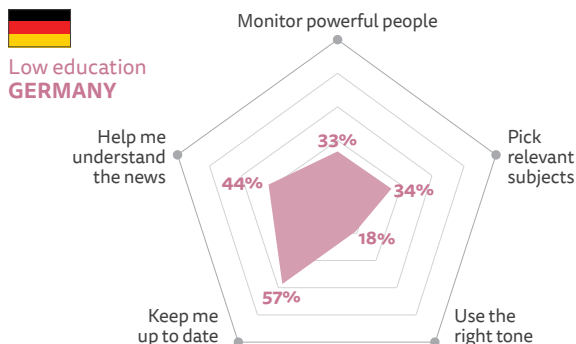
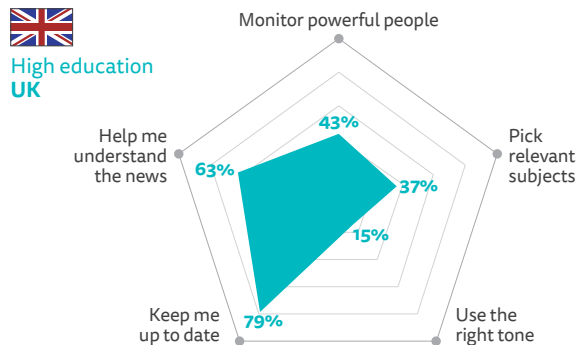
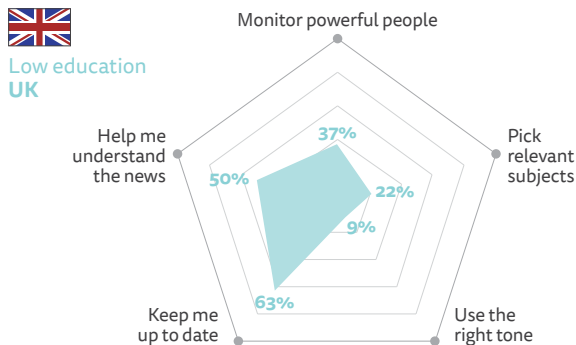
ATTITUDES WITHIN COUNTRIES

We can also see differences between groups within countries. If we look at differences by education, in the UK and Germany we can see that those with higher levels of formal education are more likely to evaluate the news media positively along every dimension. Those with lower levels of education are, for example, significantly less likely to say that the news media cover topics that are relevant to them, suggesting that the news agenda is more geared towards the interests and needs of the more educated. This chimes with the criticism that the news media do a better job of catering for people who are most similar to the journalists themselves, and are less able to serve those groups that are less likely to be found in the newsroom.

We might also expect to see differences by age. Older people are arguably more likely to have been socialised with a more positive view of the news media, and with a stronger normative view about the importance of the role that the news media play within society. However, when it comes to age, although the over 35s in Germany do tend to rate the media slightly more positively, in the UK the differences are small.

PROPORTION THAT AGREED WITH EACH ATTITUDE TOWARDS THE NEWS BY EDUCATION – UK AND GERMANY

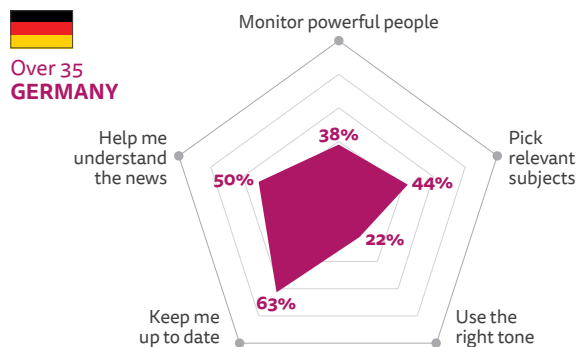
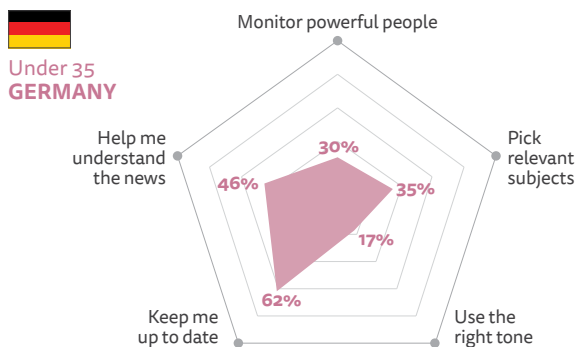
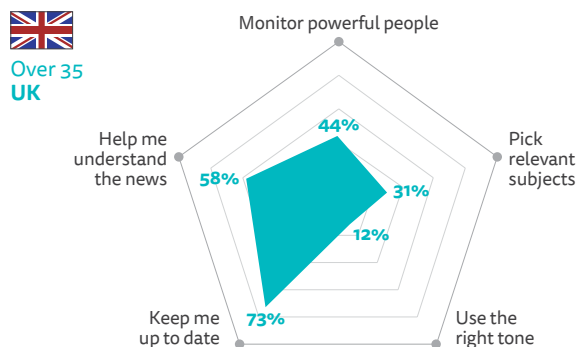
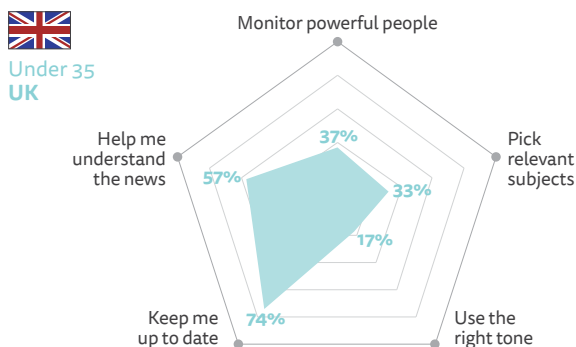
The news media in my country:



Q15_2019_1/2/3/4/5. Please indicate your level of agreement with the following statements: The news media monitor and scrutinise powerful people and businesses/The topics chosen by the news media do not feel relevant to me/The news media often take too negative view of events/The news media keep me up to date with what's going on/The news media help me understand the news of the day. Base: Low/high education: UK = 558/839, Germany = 596/642.

PROPORTION THAT AGREED WITH EACH ATTITUDE TOWARDS THE NEWS BY AGE – UK AND GERMANY

The news media in my country:



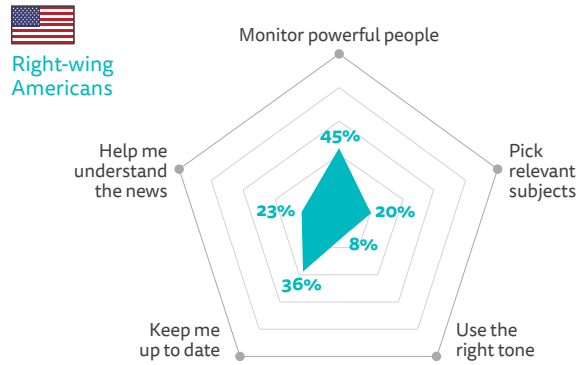
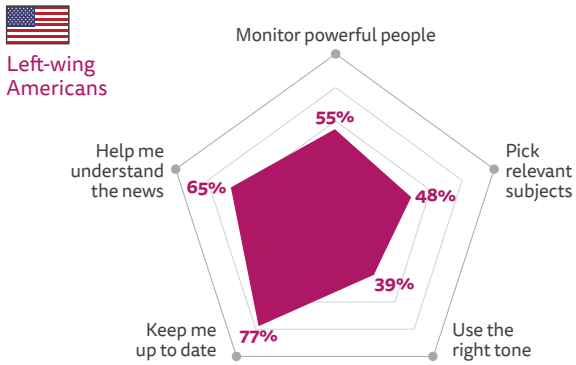
Q15_2019_1/2/3/4/5. Please indicate your level of agreement with the following statements: The news media monitor and scrutinise powerful people and businesses/The topics chosen by the news media do not feel relevant to me/The news media often take too negative view of events/The news media keep me up to date with what's going on/The news media help me understand the news of the day. Base: Under/Over 35s: UK = 413/1610, Germany = 450/1572.

In the US, people's evaluations are much more likely to be shaped by their political views – reflecting the highly politicised nature of attitudes towards the news media. As illustrated below, right-wing Americans evaluate the news media very negatively – even more negatively than in countries with low trust in the news like Hungary and Greece. Conversely, left-wing Americans are more

positive towards the news media than high-trust countries like Finland and Canada. The most striking differences surround attitudes towards help with understanding: 65% on the left think that the news media do a good job in helping understand the news, whereas only 23% of right-wing Americans think the same.

PROPORTION THAT AGREED WITH EACH ATTITUDE TOWARDS THE NEWS BY POLITICAL LEANING – USA

The news media in my country:



Q15_2019_1/2/3/4/5. Please indicate your level of agreement with the following statements: The news media monitor and scrutinise powerful people and businesses/The topics chosen by the news media do not feel relevant to me/The news media often take too negative view of events/The news media keep me up to date with what's going on/The news media help me understand the news of the day. Base: Left/Right: USA = 504/497.

THE ASSOCIATION WITH TRUST AND PAY

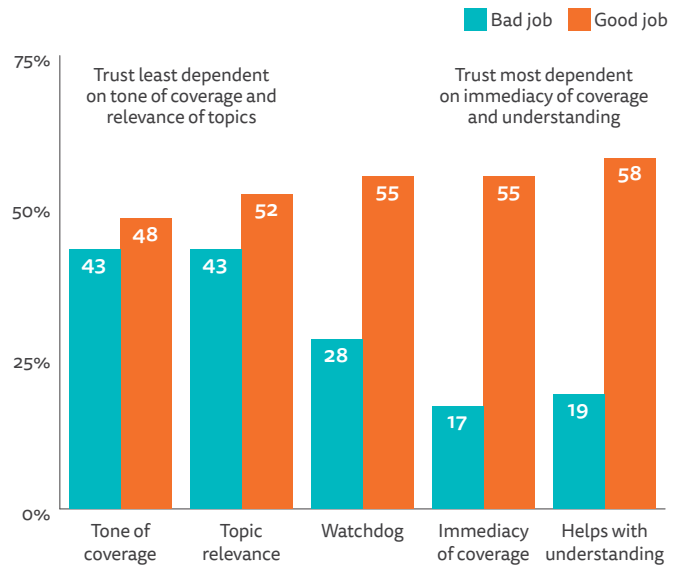
As we alluded to at the start of this section, people's evaluations of the news media matter because they might be linked to positive outcomes like trust in the news and willingness to pay for it.

Predictably, our study shows that those who think that the news media fulfil the basic functions examined in this section are more likely to trust the news. However, the impact of each role on trust varies considerably. Views on the tone of news coverage do not appear to influence trust very much: 48% of those who think that the news media use the appropriate tone say they trust the news, but this only drops to 43% among those who find the news too negative.

Other media attributes are very important for trust. The majority (58%) of those who agree that the news media do a good job in helping them understand what is going on in the world trust the news, while only 19% of those who disagree with the statement do so. Immediacy was also found to be highly correlated with trust. Those who believe that the news media do a good job in keeping them up to date with events tend to trust news (55%), while only 17% of those who disagree with the statement do so. Put simply, we find that people are more likely to trust the news if they feel it keeps them up to date with what's happening, helps them understand it, and holds power to account.

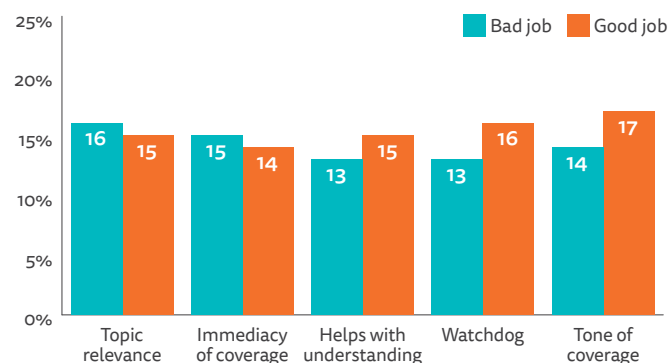
Though the links between these evaluations and trust are sometimes quite strong, links with patterns of news use – such as paying for online news – tend to be weaker. Regardless of whether we consider people that have positive or negative evaluations of the media along these dimensions, the proportion that have paid for online news in the last year remains the same at around 15%. This suggests that evaluations of the news media are not necessarily important for people's willingness to pay, and that this willingness is likely to be influenced by other factors.

PROPORTION THAT TRUSTS NEWS BY ATTITUDES TOWARDS THE NEWS – ALL MARKETS



Q15_2019_1/2/3/4/5. Please indicate your level of agreement with the following statements: The news media monitor and scrutinise powerful people and businesses/The topics chosen by the news media do not feel relevant to me/The news media often take too negative view of events/The news media keep me up to date with what's going on/The news media help me understand the news of the day. Q6_2016_1. Please indicate your level of agreement with the following statements: I think you can trust most news most of the time. Base: Bad/Good: Tone of coverage = 12,295/29,774, Topic relevance = 21,950/18,876, Watchdog = 31,465/14,479, Immediacy of coverage = 46,881/8699, Helps with understanding = 38,786/11,061.

PROPORTION THAT PAID FOR ONLINE NEWS IN THE LAST YEAR BY ATTITUDES TOWARDS THE NEWS – ALL MARKETS



Q15_2019_1/2/3/4/5. Please indicate your level of agreement with the following statements: The news media monitor and scrutinise powerful people and businesses/The topics chosen by the news media do not feel relevant to me/The news media often take too negative view of events/The news media keep me up to date with what's going on/The news media help me understand the news of the day. **7a.** Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? Base: Those who give positive/negative responses to different evaluations: Tone of coverage = 12295/29774, Topic relevance = 21950/18876, Watchdog = 31465/14479, Immediacy of coverage = 46881/8699, Helps with understanding = 38786/11061.

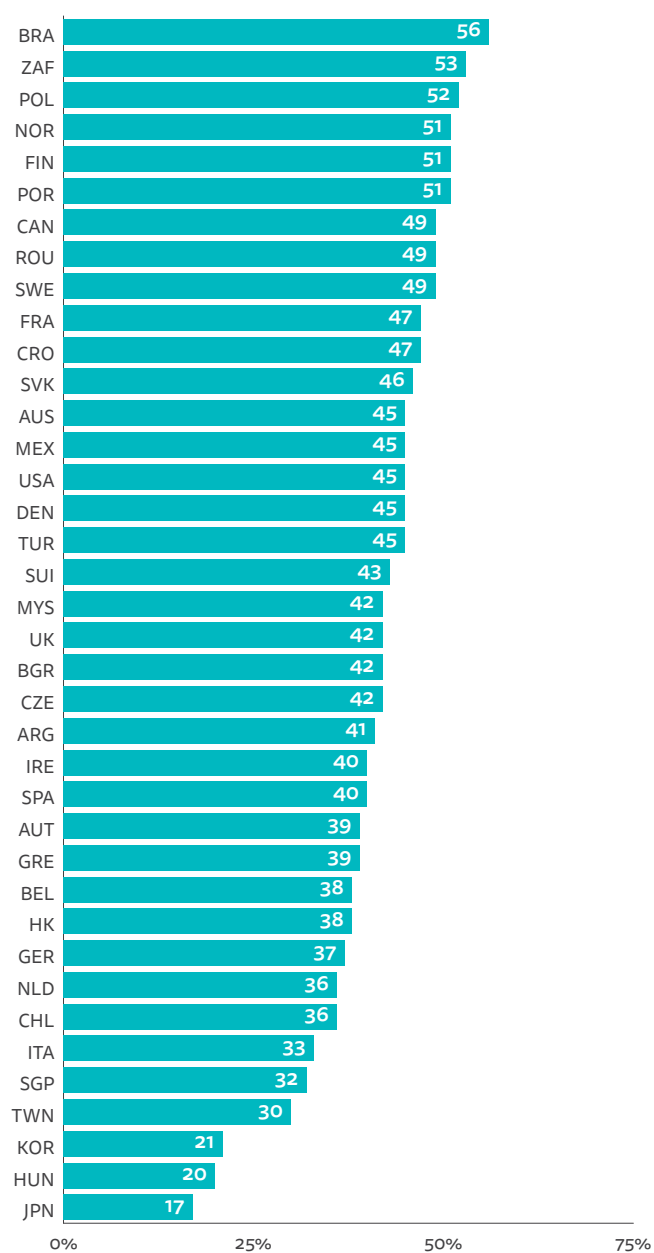
THE NEWS MEDIA'S WATCHDOG ROLE

We can also take a closer look at attitudes towards the watchdog role of the news media – whether they succeed in monitoring and scrutinising the powerful. As we have already seen, a majority of those who think that the news media fulfil their watchdog role trust the news (55%), whereas only about a quarter (28%) of those believing they do not fulfil this role say the same.

We find large variations in attitudes towards the media's watchdog role country to country. In Brazil, South Africa, Poland, Norway, Finland, and Portugal, a majority agrees that the news media do indeed monitor and scrutinise powerful people. On the other hand, in Korea, Hungary, and Japan only about a fifth of respondents agree with that statement. In Japan, in particular, the press is seen as being too close to the government, with most coverage rarely deviating from the official line.

The other side of this is how journalists in different countries evaluate their own role as watchdogs. We compare our audience evaluations of the watchdog role with how journalists in different countries evaluate the importance of being a watchdog in the 2016 Worlds of Journalism Study.²³ We find that in countries like Germany or the UK, there are few discrepancies between how important journalists think being a watchdog is for their work, and how audiences see the news media's performance as watchdogs.

PROPORTION THAT AGREES THAT THE NEWS MEDIA MONITOR AND SCRUTINISE THE POWERFUL – ALL MARKETS



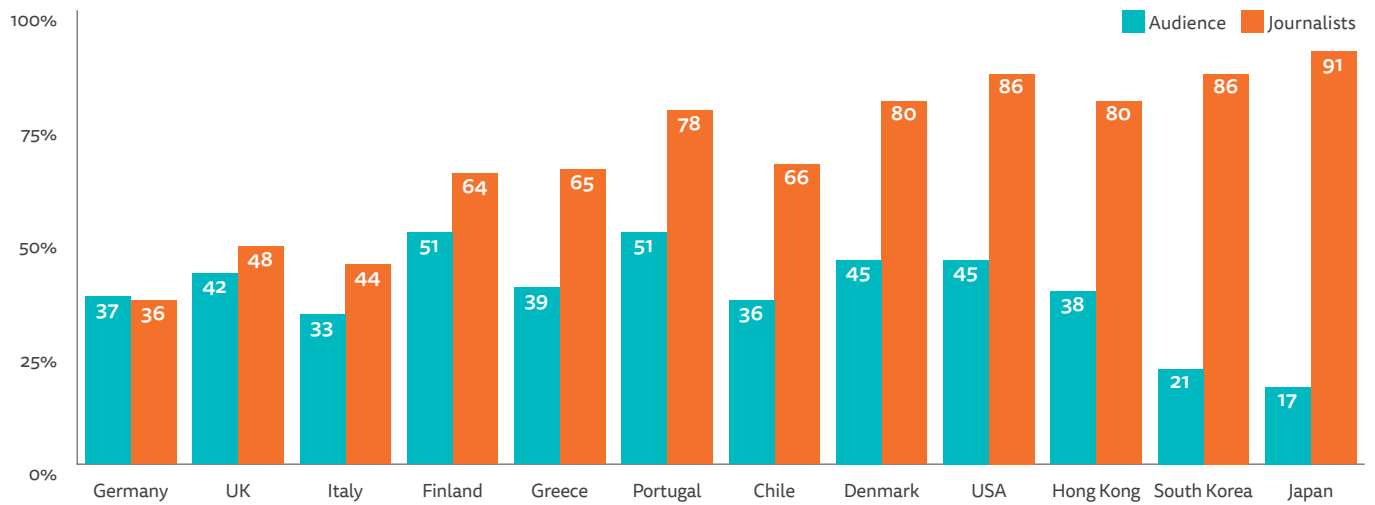
Q15_2019_1. Please indicate your level of agreement with the following statement: The news media monitor and scrutinise powerful people and businesses. Base: Total sample in each market = 2000, Taiwan = 1005.

²³ <http://www.worldsofjournalism.org>

However, we see large discrepancies in other countries. In Japan, 91% of journalists think that monitoring and scrutinising political leaders is important for their work, whereas only 17% of news users in Japan agree that the news media monitor and scrutinise powerful people and businesses. We further find large discrepancies in the US, where 86% of journalists consider being a watchdog important to their work, but only 45% of American news users think that the news media are fulfilling their watchdog role.

Our research shows that most people want some simple, basic things from the news media – to keep them up to date, help them understand what is going on, and keep an eye on those in a position of power. These are things that many journalists and news media would argue they are already doing, though our data suggest that there is still a significant gap to close in terms of public perception. Better transparency about journalistic processes might help, along with improved marketing of the important work journalists do.

PROPORTION OF AUDIENCE AND JOURNALISTS THAT AGREE THAT THE NEWS MEDIA MONITOR AND SCRUTINISE THE POWERFUL – SELECTED MARKETS



Q15_2019_1. Please indicate your level of agreement with the following statement: The news media monitor and scrutinise powerful people and businesses. Base: Total sample in each market = 2000. Note: Data for journalists' opinions taken from the 2016 Worlds of Journalism Study. Please tell me how important each of these things is in your work: Monitor and scrutinise political leaders.

2.5 How Younger Generations Consume News Differently

Antonis Kalogeropoulos
Research Fellow, Reuters Institute
for the Study of Journalism

In this section we look at the news consumption of younger generations – a group that is of great interest to news publishers around the world, but also one they are finding it increasingly hard to reach. We explore the attitudes and behaviours that define the under 35s, and ask what kind of journalism or brand positioning might appeal to them. Our data highlight that young people are very reliant on mobile, and spend a lot of time with a range of different social networks. As such, much of their media use is on-demand and algorithmically curated/personalised. The problem for publishers is that this means that individual news brands tend to play a relatively small role in young people's lives.

Here, we make a distinction between Generation Y (Gen Y) – often called millennials and represented in our sample by those aged 25–34 – and Generation Z (Gen Z), those born after the mid-1990s and aged 18–24.²⁴ The reason for this separation is that Gen Z are often thought of as digital natives with no memories of the pre-internet age. Gen Y, on the other hand, grew up at the turn of the millennium in a world without Facebook and YouTube.

Throughout this section we will combine our survey data with detailed qualitative data collected from young people in the UK and the US. This study, conducted by market research agency Flamingo, was based on tracking the news behaviour of a strategic sample of 20 participants over two weeks in January/February 2019, followed by in-depth interviews with them and their friends. The sample was made up of young people with different news habits, from a range of socio-economic backgrounds.

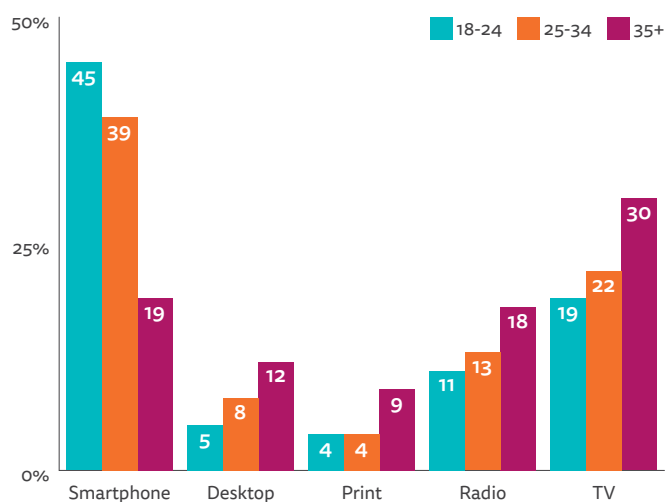
PRIMACY OF THE SMARTPHONE

Data from both the survey and the qualitative research emphasise what we have known for some time – that young people are highly reliant on their phones. Our digital tracking in the US and UK shows that Gen Z and Gen Y spend a large part of their waking hours interacting with smartphones.

They use them for communication, for media, for games, for dating – and for news. Across all markets, our survey data reveal that the smartphone is the main device used for accessing news for the vast majority of under 35s (69%).

Another way of illustrating the primacy of smartphone news for young people is to look at data on their first contact with news on a typical day.²⁵ Nearly half of Gen Z news users (45%) in our combined sample come into first contact with news in the morning via the smartphone, with only 19% via TV and 5% via desktops/laptops. Similar trends can be seen among Gen Y, who also first turn to their smartphone (39%) over TV (22%) or the computer (8%). By sharp contrast, for over 35s television is still the most likely first contact point with news (30%), with smartphone (19%) and radio (18%) some way behind.

PROPORTION THAT SAID EACH WAS THEIR FIRST CONTACT WITH NEWS IN THE MORNING BY AGE – SELECTED MARKETS

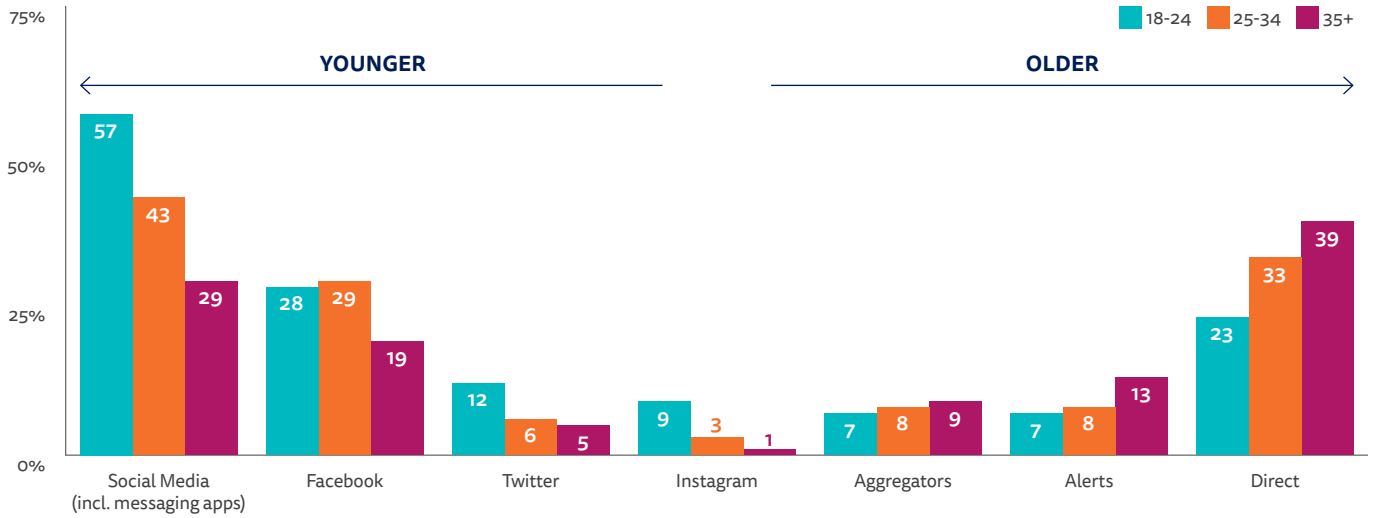


Q9c_new2016. What is the FIRST way you typically come across news in the morning? Base: 18-24/25-34/35+: selected countries = 1863/3019/15247. Note: Data from US, UK, France, Italy, Spain, Ireland, Norway, Finland, Netherlands, Japan.

²⁴ While there is no agreement on the year of birth that separates the two generations, we used 1995, which is the most commonly used.

²⁵ The data on first contact with news from a question asked in ten countries: US, UK, France, Italy, Spain, Ireland, Norway, Finland, Netherlands, Japan.

PROPORTION THAT USES EACH DURING FIRST CONTACT WITH NEWS IN THE MORNING VIA SMARTPHONE BY AGE – SELECTED MARKETS



Q9d_2016_rc5. You mentioned that your FIRST contact with news in the morning is using internet via smartphone, in which ONE of the following places do you typically find your first news? Base: 18-24/25-34/35+: selected countries = 842/1195/2982. Note: Data from US, UK, France, Italy, Spain, Ireland, Norway, Finland, Netherlands, Japan.

We can also look in more depth at where people go when they first pick up their smartphones for news. While those over 35 are likely to first go directly to a news site via an app or the mobile browser (39%), Gen Z are more likely to turn to social media and messaging apps (57%). In other words, news brands are less important for this group than for over 35s. Gen Y are somewhere in the middle, with 43% getting their news via social media and messaging apps and 33% directly. Facebook is equally popular as a first destination with both groups, and Instagram has become more popular in the last few years as a first destination. Interestingly, Twitter is twice as popular with Gen Z users compared to Gen Y users. Direct traffic is relatively more important in the UK than in the US, partly due to the prominence of publishers like BBC and the Guardian.

Insights from the in-depth interviews in the UK and the US reveal similar patterns among young people:

“The first thing I would do would be check social media, see if there’s anything on Facebook.”

Courtney, Gen Z, US

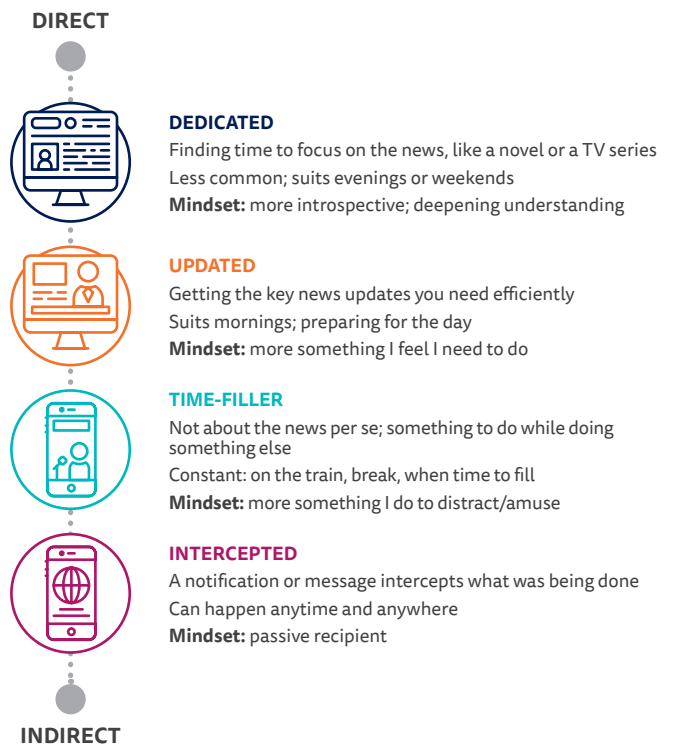
“In the morning, I’ll go to the BBC app. I will literally click on it, and I will go, ‘Right, okay, what’s happening?’”

Chloe, Gen Y, UK

MOMENTS OF CONSUMPTION

Our qualitative research, which relied on tracking data and interviews with a group of 20 participants, identified four key moments of news consumption for young people: (i) dedicated moments where they give time to news (usually on evenings and weekends), (ii) a moment of update (usually in the mornings), (iii) time fillers (commuting or in a queue), and (iv) intercepted moments where they receive alerts from news organisations or messages from friends with news. Of course, not all young people use all four moments, but most did use some combination of these.

FOUR TYPICAL KEY NEWS MOMENTS FOR YOUNGER GROUPS



Social media, as one example, are important for keeping young people updated and for filling time, but are not an appropriate place for dedicated news consumption:

“It’s kind of like being somewhere and seeing something in a far-off distance and being like ‘oh, what’s going on over there?’ and you go and see it on Twitter and then you let them take you somewhere ...”

Alex, 31-35, UK

Young news users also rely on news aggregators like Apple News, Flipboard, and Upday, particularly when they use news in 'time filler' moments or want to get a quick update about what is happening during intercepted moments (e.g. via a news alert). Aggregators are increasingly prominent on smartphones, where headline lists can be accessed by swiping left or right from the smartphone homescreen on many handsets. According to the interview findings, aggregators have two distinct audiences. Among engaged young users they are used to curate the news they want and exploit the diversity of sources. For more passive news users, using an aggregator is an easy way to browse around series of headlines.

"If I'm somewhere where I don't really have time to read a news story, I do rely on headlines. The fact that I have access so that I can look at it in two seconds, because I'm not really supposed to be on my phone at work but if I can just pull it out, click one button to get to the Apple News story and the answer is right there for me."

Maggie, Gen Z, US

For Gen Z, and to a lesser extent Gen Y, the key appeal of these services is convenience. Both groups enjoy multitasking, and they want media to fit the device and networks where they spend their time.

YOUNG PEOPLE ARE CHANGING THEIR PREFERENCES AROUND SOCIAL MEDIA

Looking in more depth at the role of social media networks, we find significant differences between the groups, and also changes over time. Facebook is used slightly more by Gen Y (52%), while Twitter, Instagram, and Snapchat are used significantly more by Gen Z news users than millennials or by users over 35.

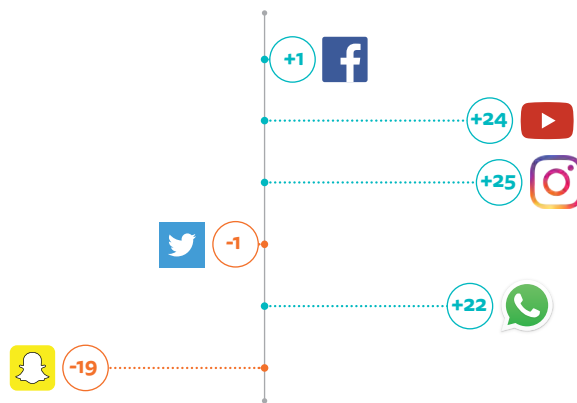
"[Facebook is] ancient. Like, a mum's thing. I don't really use it anymore."

Ellie, Gen Z, UK

We can also consider the amount of time that people spend on these platforms, and how it's changing.

Our survey data suggest that most young people (and in particular those in Gen Z), spent a lot more time on Instagram this year compared to last. On the other hand, there was a decrease in time spent with Snapchat – something that might worry publishers who have invested heavily in the Discover news platform.

NET DIFFERENCE IN TIME SPENT WITH EACH SOCIAL NETWORK IN LAST YEAR BY UNDER 35s – ALL MARKETS



Q12C, 2019. You say you use the following social networks for any purpose, in the last 12 months, has the amount of time you spend using them changed? Base: Under 35s that used each social network in the last week: Facebook = 15,267, YouTube = 15,838, WhatsApp = 11,448, Instagram = 11,725, Snapchat = 4674, Twitter = 5249. Note: Showing difference between proportion that said 'more time' and proportion who said 'less time'.

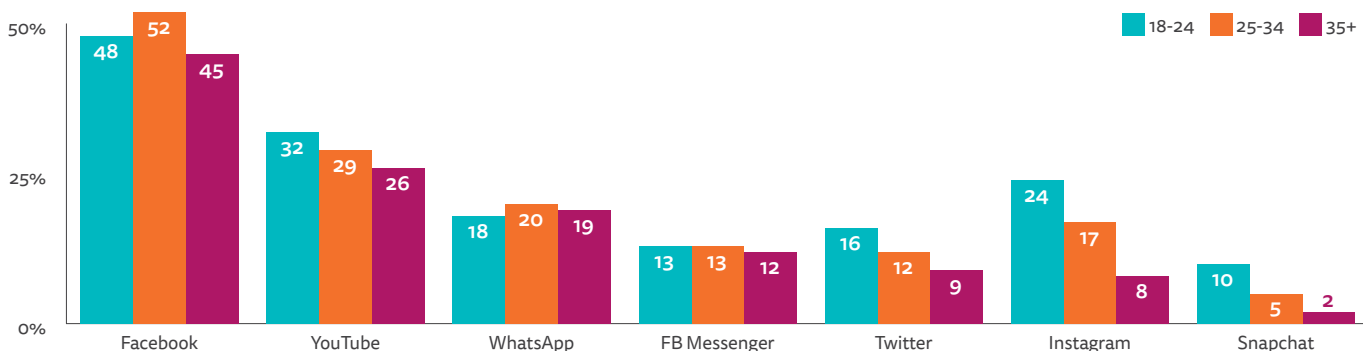
However, while many publishers think of Instagram as 'the platform' to reach younger groups, young people themselves often do not see it as the right environment for news:

"I don't think I would follow them [news organisations] on Instagram. ... When I go on Instagram my mindset is 'I'm going to get information but it's more related to entertainment.'"

Richard, Gen Y, UK

Once again, understanding the expectations of different audiences and the 'moments' they are in will be critical for engagement with particular platforms.

PROPORTION THAT USED EACH SOCIAL NETWORK FOR NEWS IN THE LAST WEEK – ALL MARKETS



Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing, or discussing news in the last week? Base: 18-24/25-34/35+. All markets = 8272/13361/54116.

IDENTIFYING WITH NEWS BRANDS

What is the role of traditional news brands in this distributed ecology? Insights from our digital tracking of news users' mobile consumption reiterate that news brands play a very small role in young people's lives. Most smartphone time was taken up by social network apps, internet browsers, podcasts, mail, and movie/music streaming devices – followed by dating apps, maps, and transport applications. Young people have a very low threshold for apps that don't provide a great experience, while they value services that are relevant and useful at all times. No news app was within the top 25 apps used by all the respondents in the study, whereas Instagram was the application found on almost all phones with the highest use in terms of daily minutes used.

This does not mean that traditional brands are not valued by young consumers. Most do have an 'anchor news brand' that they will turn to when a major story breaks and needs verifying – in our qualitative research study this was typically the BBC or Guardian in the UK, and CNN or the *New York Times* in the US. The choice of this brand is often heavily influenced by early parental influence but the format is almost always digital.

HOW YOUNG PEOPLE SPEND TIME ON THEIR SMARTPHONES AND ROLE OF NEWS

Aggregated view across 20 respondents



TONE, AGENDA, AND FORMATS

In our interviews, young people were often frustrated by the negativity of the news agenda, about sensationalism and about the perceived agenda of the mainstream media. Sometimes they feel that the views and concerns of their generation – such as climate change and minority rights – are not properly represented. But equally they do not want traditional media to go away, dumb down, or radically change their style just to appeal to them. For instance, young people expressed dissatisfaction with the tone used by automated news bots built by traditional news brands:

- *I don't need the news to be my friend.*
 - **No. (x2)**
 - *It doesn't need to tell me 'Hey, you know what's happening in India right now?' It can just be like, 'Hey, this is what's happening in India.'*
 - **Yes, exactly.**
- Chloe, Victoria, Monica, Gen Y friendship group interview, UK

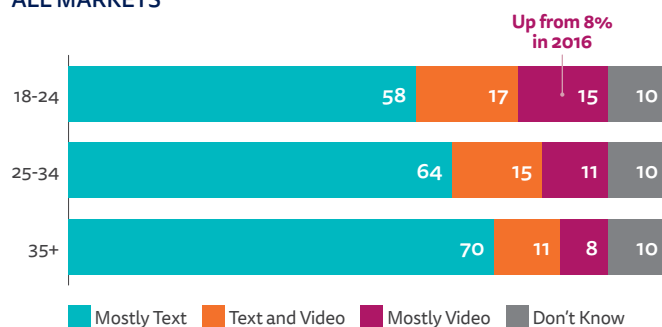
On the other hand, they also expressed strong interest in news formats that were more visual and easier to consume than an 800-word article. Some said the lack of context or background was often a problem too, so visual explainers – like those pioneered by Vox – tested well; as did other kinds of visual and mobile storytelling including graphical storytelling from publishers like the Guardian and the BBC.



SOURCE: BBC AND GUARDIAN

Podcasts were strikingly popular with our young respondents, but the appeal of online news video was more mixed. Younger groups are more likely to use online video than older generations, with around 15% of 18–24s saying they prefer using it to text. Again, we find that Instagram is playing a central role in popularising news video. However, it should be noted even among Gen Z, the majority (58%) prefers text over video because of the control and flexibility that text still offers. Video is not the way to engage young people, rather it is one of many formats that can engage.

PROPORTION THAT PREFERS TEXT OVER VIDEO BY AGE – ALL MARKETS



OPTQ11D. In thinking about your online news habits, which of the following statements applies best to you? Base: 18-24/25-34/35+. All markets = 3642/5878/28770

IMPLICATIONS FOR PUBLISHERS

Overall, we find differences between Gen Z and Gen Y as well as significant overlaps. Both groups have fully embraced digital media – albeit in slightly different ways, with Gen Y carrying a certain nostalgia for the physicality of older forms of media, and Gen Z apparently having little time for media that does not display well on a smartphone or does not meet their exacting requirement for relevance forged by Facebook, Netflix, and Spotify. Both groups understand the importance of traditional news brands, but tend to be less loyal than their parents – preferring to pick-and-mix from multiple outlets.

The increased reliance on social media and other algorithmically driven services – which we have documented for several years – highlights that these generations do not want to work hard for their news. This year's qualitative study shows that they want news access to be easy, and entertaining – but they also want it to be authentic, fair, and meaningful. They certainly don't want it to be dumbed down.

None of this makes it easy for publishers to define strategies that will keep these groups happy at the same time as satisfying more traditional audiences with stronger allegiances and patterns. To some extent new formats like podcasts and explainers may help bridge the divide but it seems unlikely that younger users will ever be persuaded to pursue a monogamous relationship with the news or to abandon their platform-based habits. All this suggests that working to identify ways to reach and monetise audiences on third-party platforms will become an increasingly important focus for industry.

A full report on the findings of the qualitative study in the UK and US will be published in September 2019 (in conjunction with Flamingo Research).

2.6 Podcasts: Who, Why, What, and Where?

Nic Newman
 Senior Research Associate, Reuters Institute
 for the Study of Journalism

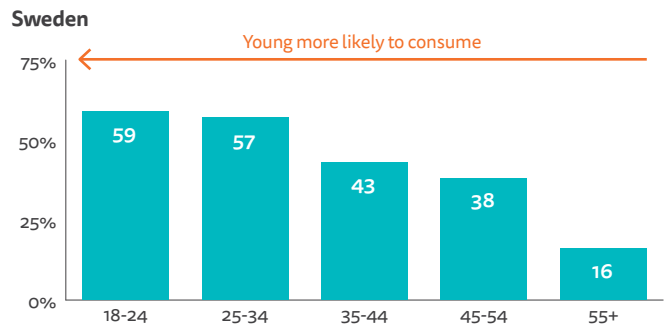
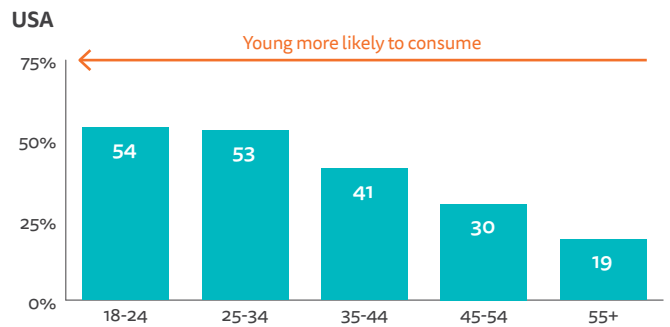
In the Executive Summary we saw how podcast consumption is growing in a number of countries and how monetisation models are emerging. In this section we explore the demographics in more detail, as well as the most popular types of podcast, the preferred locations for podcast use, and some of the motivations for listening to these episodic audio experiences.

MOST PODCAST LISTENERS ARE YOUNG

The most striking aspect of podcast consumption is the appeal to younger people. In Sweden and the United States, two countries that have embraced podcasts, we find that over half of under 35s have used a podcast monthly compared with less than a fifth of over 55s.

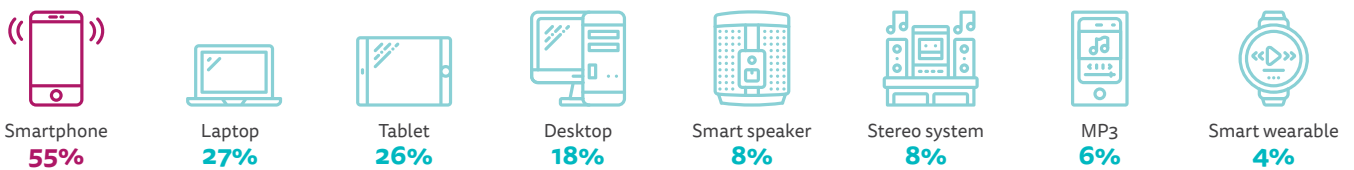
By contrast, these older listeners are twice as likely to consume traditional radio news as the young, many of whom do not even own a radio. This is the plugged-in smartphone generation and it's no surprise that the majority of usage is through these connected devices, many of which come pre-installed with podcast apps and now come equipped with high fidelity wireless headphones. In the UK, 55% of listening takes place via smartphone, a figure that rises to 62% for under 35s.

PROPORTION THAT USED A PODCAST IN THE LAST MONTH - BY AGE



Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Base: 18-24/25-34/45-54: USA = 177/380/320/246/889, Sweden = 132/335/323/343/874.

PROPORTION THAT USED EACH DEVICE TO LISTEN TO PODCASTS - UK

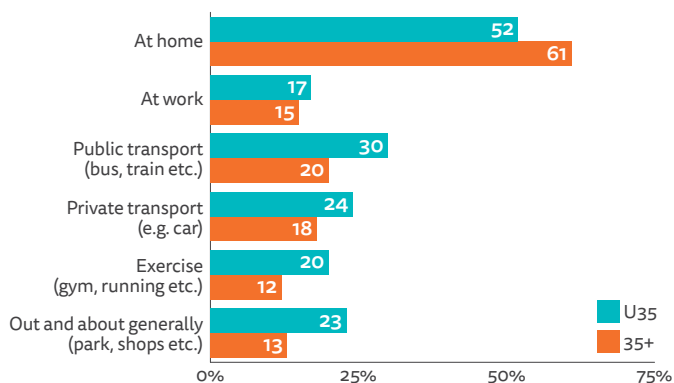


Which, if any, of the following device(s) do you use to listen to podcasts? Source: UK YouGov Profiles, nationally representative sample, March 2019. Base = 921.

WHERE DO PEOPLE LISTEN TO PODCASTS?

The majority of podcast usage is at home (58%), commuting on public transport (24%) or via private transport such as the car or bike (20%). Around a fifth (18%) listen when out and about generally (going for a walk or to the shops), with a similar proportion (16%) listening when taking exercise. A further 16% finds the time or opportunity to listen to podcasts at work. Younger groups are slightly more likely to listen on the move, whereas over 45s are twice as likely to listen in the home.

PROPORTION THAT USED A PODCAST IN EACH LOCATION BY AGE - SELECTED MARKETS



PODCAST MOMENTS: WHAT RESPONDENTS SAY

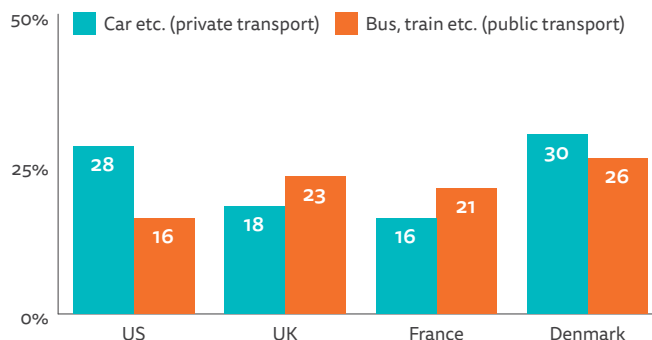
 <p>IN BED 'On my tablet last thing at night or first thing in the morning on waking'</p>	 <p>TAKING A BREAK 'Home while having my coffee in the morning' 'In my lunchbreak'</p>
 <p>OUT AND ABOUT 'Walking the dog' 'On a walk with my son asleep in the buggy'</p>	 <p>CHORES 'When I'm doing the laundry' 'When I'm cooking'</p>

Q11F_podcast_location. In what circumstances do you tend to consume podcasts regularly? Base: Under 35s/Over 35s that consumed a podcast in the last month: selected markets = 4678/4375 Note: This question was asked in US, UK, Germany, France, Italy, Spain, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Japan, South Korea, Australia, and Canada.

COMMUTING TIME

The average length of podcasts – typically between 20 and 40 minutes – is partly influenced by the time taken on the average commute. This is particularly true for the news industry where the *Guardian's* Daily News podcast Today in Focus gets much of its listening during the morning rush hour. Post Reports from the *Washington Post* is released in time for the evening commute. Americans are much more likely to listen in the car, according to our data, where they spend more time generally, while Europeans are more likely to listen when using public transport. One exception is Denmark where listening to podcasts or music on a bicycle has become a part of daily routines for many.

PROPORTION THAT USED A PODCAST VIA PRIVATE/PUBLIC TRANSPORT IN THE LAST MONTH - SELECTED MARKETS



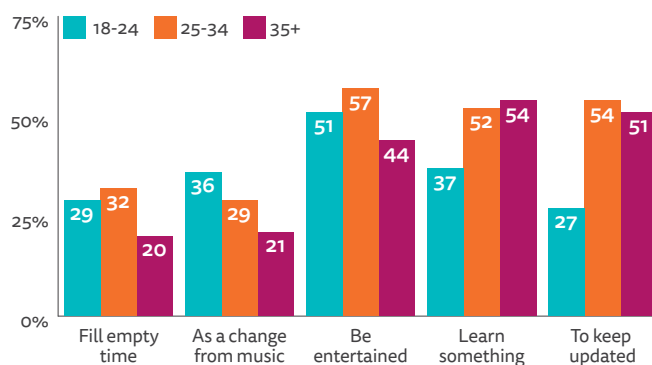
Q11F_podcast_location. In what circumstances do you tend to consume podcasts regularly? Base: Those that consumed a podcast in the last month: USA = 667, UK = 379, France = 475, Denmark = 487.

WHY PODCASTS?

Across all our countries, the main reasons for listening to podcasts are to keep updated about topics of personal interest (46%) and to learn something new (39%). Other motivations include to fill empty time (25%) and as a change from music (22%). But these reasons do not play out equally across age groups. Older listeners are more interested in keeping updated whereas the young are looking for podcasts that entertain them or fill empty time.

Looking specifically at the UK we also can see important differences between the younger age groups: 18-24s – which we have previously referred to as Gen Z – are less likely to be looking to learn or be updated, and more likely to be looking for entertainment or a change from music; 25-34s, or Gen Y, are also looking to be entertained, but want to fill empty time with content that is educational and keeps them updated.

MAIN REASONS FOR LISTENING TO PODCASTS BY AGE - UK



Q11F_podcast_reason. Which, if any, of the following are reasons why you listen to podcasts? Base: 18-24/25-34/45+ that listened to a podcast in the last month: UK = 53/101/160.

Further insights on motivation came from our in-depth interviews with young people, supporting this year's research. The first relates to the convenience. Podcasts are great for multitasking but they also don't require complex interfaces:

"I think it's a bit more passive ... You're able to multitask. Like, I can cook and listen to a podcast, for example ..."

Sam, 25-30, US

In this sense podcasts bring information to listeners in a way that is effortless, but the linear nature is a welcome break from the usual distractions of digital media. On the other hand, they maintain the element of control and choice that is second nature to millennials and digital natives, but that traditional radio lacks:

"[With] radio you can't control what shows are on, whereas podcasts you can."

Mark, 31-35, US

Then there is the content itself, which young people feel is often more diverse, more entertaining, and less stuffy than traditional radio. The characters and hosts often bring a more informal style and they tell stories in a more natural and less affected way.

"[Podcasts are] more of an outsider source of news or opinion, so you have a diverse range of news ideas and thoughts from vastly different people; not your traditional people who look and act a certain way."

Chloe, 31-35, UK

WHAT PODCASTS?

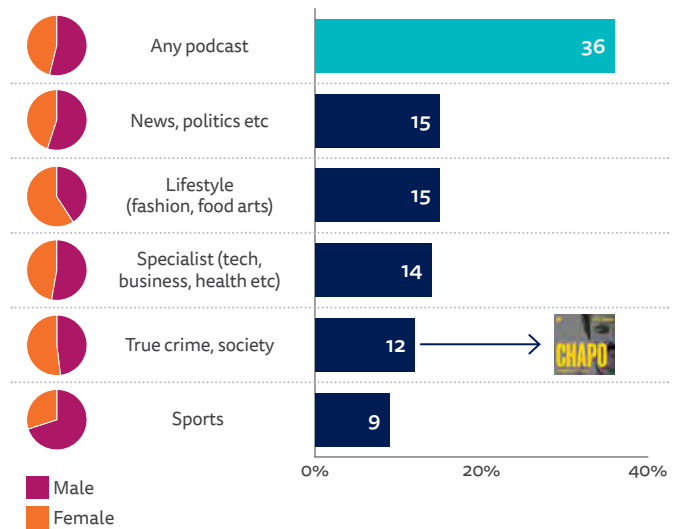
Given the insights above, it is worth noting that politics and news (15%) is just one part of the content universe. Other popular genres include lifestyle content (15%), true crime (12%), specialist interest (14%), and sports (9%). But many podcasts defy classification with news often discussed in new ways through comedy and celebrity. Young people are listening to podcasts that entertain and inform. This is why many daily podcasts like The Daily from the *New York Times* use narrative storytelling techniques pioneered in true crime formats such as *Serial* to add suspense and jeopardy, to keep listeners hooked. *Vice* and others are applying these techniques to blockbuster documentaries (e.g. *Chapo*, *Kingpin on Trial*).

In this chapter we have seen how podcasts carry many of the same benefits as radio – such as multitasking and ease of use – but they have characteristics of their own which are enhancing audio storytelling and engaging new groups.

In the home, the flexibility and control offered by podcasts is supplementing and in some cases replacing traditional radio, but podcasting is also taking audio to new locations where there is no easy access to radio. Audio rich smartphones enable audio to compete with newspapers, apps, and websites on public transport for the first time and it makes routine tasks like walking the dog or exercising in the gym less boring and more productive.

Critically, podcasts are bringing fresh voices and production techniques to a medium that has changed little in a generation. Low barriers to entry, combined with high levels of creativity, are shaking the foundations of the radio industry.

PROPORTION THAT USED EACH PODCAST GENRE IN THE LAST MONTH – ALL MARKETS



Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Base: Total sample = 75,749.

For publishers many questions remain, not least the overlap with traditional news, the influence of platforms, and the questions of monetisation. The platform picture is changing fast with Spotify and Google joining Apple in a race for the best content. Business models are still emerging but the evidence in this chapter about the underlying drivers of this change suggest we are a long way from reaching 'peak podcast'.



Section 3

Analysis by Country

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

These include 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 2019 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 (2018). Where appropriate, our country-based authors have also referenced industry-based statistics that supplement our survey-based approach.

Whilst most of our countries see internet penetration of 80% or more, Brazil, Mexico, South Africa, and Turkey in particular have far lower levels of access. In those countries we are looking at the habits of around half the adult population. It should also be noted that in Argentina, Brazil, Chile, Greece, Mexico, South Africa and Turkey our samples tend to be based more around urban areas.

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.

We have ordered the countries by geography (Europe, Americas, Asia-Pacific, and Africa) and within each region countries are then ordered alphabetically – with the exception of UK at the start of the Europe section and the United States at the start of the Americas:

Europe			Americas		
3.01	United Kingdom	68	3.25	United States	118
3.02	Austria	70	3.26	Argentina	120
3.03	Belgium	72	3.27	Brazil	122
3.04	Bulgaria	74	3.28	Canada	124
3.05	Croatia	76	3.29	Chile	126
3.06	Czech Republic	78	3.30	Mexico	128
3.07	Denmark	80	Asia Pacific		
3.08	Finland	82	3.31	Australia	132
3.09	France	84	3.32	Hong Kong	134
3.10	Germany	86	3.33	Japan	136
3.11	Greece	88	3.34	Malaysia	138
3.12	Hungary	90	3.35	Singapore	140
3.13	Ireland	92	3.36	South Korea	142
3.14	Italy	94	3.37	Taiwan	144
3.15	Netherlands	96	Africa		
3.16	Norway	98	3.38	South Africa	148
3.17	Poland	100			
3.18	Portugal	102			
3.19	Romania	104			
3.20	Slovakia	106			
3.21	Spain	108			
3.22	Sweden	110			
3.23	Switzerland	112			
3.24	Turkey	114			



Section 3

Analysis by Country

Europe

Europe		
3.01	United Kingdom	68
3.02	Austria	70
3.03	Belgium	72
3.04	Bulgaria	74
3.05	Croatia	76
3.06	Czech Republic	78
3.07	Denmark	80
3.08	Finland	82
3.09	France	84
3.10	Germany	86
3.11	Greece	88
3.12	Hungary	90
3.13	Ireland	92
3.14	Italy	94
3.15	Netherlands	96
3.16	Norway	98
3.17	Poland	100
3.18	Portugal	102
3.19	Romania	104
3.20	Slovakia	106
3.21	Spain	108
3.22	Sweden	110
3.23	Switzerland	112
3.24	Turkey	114

UNITED KINGDOM

STATISTICS

Population	67m
Internet penetration	95%

The UK's prolonged and tortuous exit from the European Union has dominated the news agenda over the last year, generating widespread Brexit fatigue. Meanwhile politicians have been flexing their muscles over the regulation of big tech platforms, the role of the BBC, and the need to sustain quality journalism.

More than a third (35%) say they often or sometimes avoid the news in the UK and the majority of these cite Brexit as the main reason. Avoiders say coverage negatively affects their mood or they feel powerless to affect events. Partly as a result, and with the exception of television (+5pp), there has been no Brexit bounce for the media, with online usage flat and newspapers on the slide.

Popular newspaper brands have suffered double digit falls in print circulation with the *Daily Star* (-18%), *Daily Mirror* (-13%), and *Daily Express* (-12%) hardest hit.²⁶ These titles are now owned by Reach plc, which has merged some editorial operations to cut costs by over £10m.

Broadsheet titles have also suffered significant year on year declines in print but are pinning their hopes on new online revenue. The *Financial Times* hit its target of a million paying subscribers a year ahead of schedule, while *The Times* and *Sunday Times* have around half a million paying customers with the majority now digital-only. And after years of making substantial losses, the *Guardian* announced a small operating profit for 2018-19. More than a million people worldwide have contributed to the *Guardian* in the last three years, with 650,000 currently paying to support the publication on an ongoing basis²⁷. A new 'slow news' venture, Tortoise News, launched in April with 2,500 members – 40% of its early backers are under 30.

By contrast, advertising-supported media has been affected by widespread job cuts including around a dozen at digital-born



BuzzFeed. But it is the local and regional sector that has been hit hardest with the net closure of 245 local news titles in the last 13 years according to *Press Gazette* research. One of the UK's largest publishers, debt-laden Johnston Press, collapsed in November 2018, though most titles continue under a new company owned by its creditors (JPI media).

Against this background, a government-appointed review, headed by Dame Frances Cairncross, argued that local news coverage could disappear unless the government provides direct financial support. Her report, published in February 2019, recommended the introduction of a range of different direct and indirect public subsidies to support high-quality journalism and that Google and Facebook's approach to news should be scrutinised by a new regulator.

Further pressure on the platforms came with a highly critical report by a parliamentary committee of MPs that had been looking into disinformation. The committee accused Facebook of purposefully obstructing its inquiry and failing to tackle attempts by Russia to manipulate elections.

And in April the government announced its plans to fine or block tech platforms if they fail to tackle 'online harms' such as terrorist propaganda, child abuse, and other distressing material. The issue captured public attention with the case of 14-year-old Molly Russell who took her own life after looking at posts about suicide on her Instagram account. Molly's

father told the media that he holds the social media giant partly responsible for her death. By this time next year, the UK could have among the most stringent regulation of online platforms in the world, even as critics warn about the potential implications for free speech.

The BBC also faces new scrutiny from both politicians and commercial rivals. Its online news site came under fire from commercial rivals for publishing too much 'soft news' and for an obsession with younger audiences. It has been accused of wasting millions on promoting a new podcast-filled app (BBC Sounds) and neglecting its core speech radio channel (Radio 4). Meanwhile licence fee income is being squeezed by lack of interest from the Netflix generation and a government plan to give free TV licences to the over 75s.

Further pressure comes from calls to increase BBC funding for the local democracy reporting scheme, which has supported more than 130 new jobs in commercial newsrooms, and delivered more than 50,000 stories in its first year.

More publishers are getting involved in audio. The *Guardian*, *The Economist*, and the *FT* have launched or rebranded daily news podcasts in the last year. The BBC is investing heavily in smart speakers and AI while the *Guardian* has set up an experimental Voice Lab.

Nic Newman

Reuters Institute for the Study of Journalism

²⁶ ABC figures Feb. 2018—Feb. 2019 via *Press Gazette*.

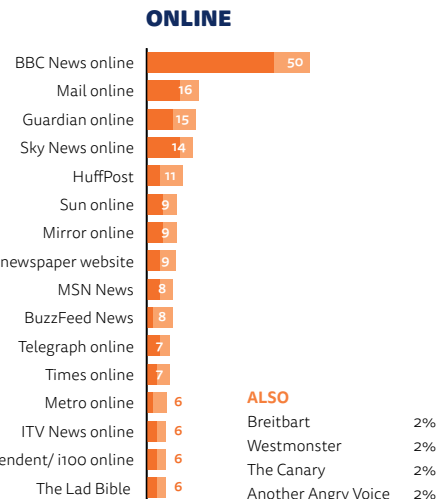
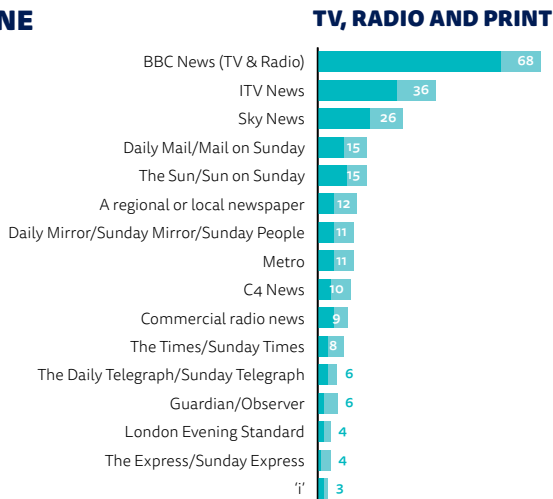
²⁷ BBC News: 'Guardian records first operating profit since 1998', www.bbc.co.uk/news/entertainment-arts-48111464

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

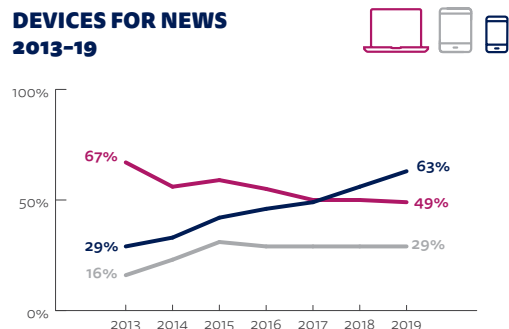
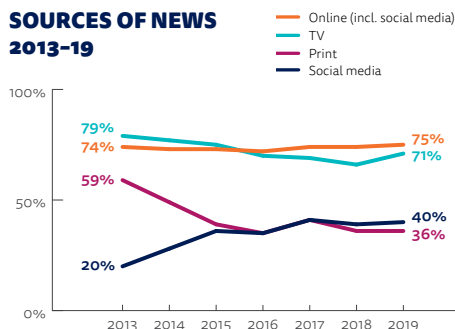
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



CHANGING MEDIA

TV news reach has started to decline but a key parliamentary Brexit vote during our survey period showed how people still turn to the medium at times of crisis. In terms of online news, the British are becoming increasingly dependent on smartphones.



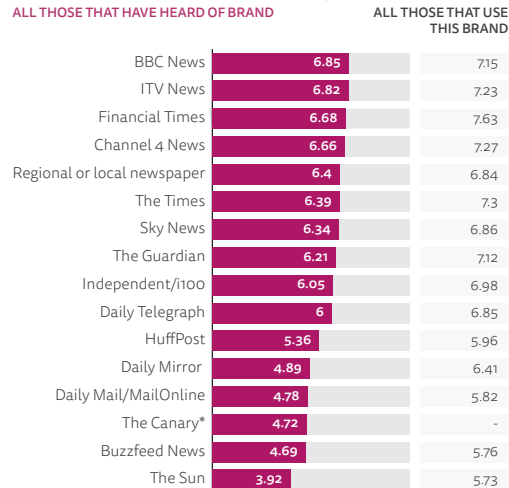
TRUST

Trust in the news has fallen over 11 percentage points since 2015. Even the most trusted brands like the BBC are seen by many as pushing or suppressing agendas – especially over polarising issues like Brexit and climate change. Broadcasters have higher levels of trust than tabloids or digital-born brands.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



* No figure for users of the Canary (did not meet 50 minimum threshold)

PAY

9% pay for **ONLINE NEWS**

21% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	28% (+1)	67%
2	Twitter	14% (-)	28%
3	YouTube	10% (+2)	52%
4	WhatsApp	9% (+4)	50%
5	Facebook Messenger	6% (+3)	46%
6	Instagram	4% (+3)	29%

27% **SHARE NEWS** via social, messaging or email

19% **COMMENT ON NEWS** via social or website

AUSTRIA

STATISTICS

Population	8.8m
Internet penetration	88%

Austria's conservative and right-wing government has been on a collision course with independent journalism as it attempts to control the agenda – and reform public service media. In a polarised political atmosphere, the public's trust in the media continues to decline.

Although Austria continues to have the highest use of printed newspapers in our report, subscriptions and sales steadily decline every year. In 2018, the most affected brands were *Der Standard* and *Kurier*, as they experienced a circulation decline of over 5% compared to the previous year. As a consequence of lower sales, one of the leading press distribution companies, Morawa, closed its business. Bucking general trends, the regional newspaper *Salzburger Nachrichten* saw the amount of copies sold grow by almost 4%.

The data collected for the *Digital News Report* show some unexpected trends: first, the proportion for respondents extremely or very interested in news declined to 64% from 69% in the previous year. Second, usage of the public service media ORF dropped via both broadcast and online. Third, trust in news media declined by 2pp after a decrease of 4pp last year. These trends are indicative of a difficult time for quality news media in Austria, currently in dispute with the governing coalition, the Austrian People's party (ÖVP) and the Freedom Party of Austria (FPÖ).

Early in the year, the government started a review of the media landscape, aimed at shaping new policies. By the end of 2018, two priorities had emerged. First, a plan to counter the negative effects of the global tech platforms on the local news markets and second, a desire to reshape the role of the public service media. The far-right Freedom Party has been particularly critical of the ORF, arguing for the abolition of the mandatory licence fee that finances the public service media. The party was successful in getting one of its party representatives elected as the chairperson of the ORF governing body; he controversially labelled critical interviews



by ORF journalists as 'insubordinate'. The ORF has issued new rules for the use of social media, with staff asked to avoid comments that could be interpreted as taking a political position of any kind.

More generally, unobvious attempts by the governing parties to shape public discourse led to a warning by the Austrian Press Council directed to all domestic editors advising them to consider information from government agencies only after detailed research and review. One example of the government's approach came in an email sent by the spokesperson of the Interior Ministry led by Herbert Kickl (FPÖ) to police departments, that was eventually leaked to the press. The email suggested limiting sharing information with critical media – and focusing on information about crime committed by foreigners.

The gloomy news media environment of 2018 was partially brightened by a promising increase in the share of users paying for digital news. Our survey suggests many of those paying come from younger demographics while other data show that some regional papers have increased digital subscribers, albeit from a low base.

As use of smartphones to access news continues to increase, Austrian news organisations find more positive responses to their efforts to drive digital revenue. These efforts include a variety of methods: fees for removing advertising (*Der Standard*), combined digital-print subscriptions (*Tiroler Tageszeitung*), access to premium digital services, which also include special offers to students (*Salzburger Nachrichten*), and metered paywall (*Die Tagespresse*).

Moreover, in November 2018, 49% of the shares of WAZ Ausland Holding GmbH, the company that owns half of the Krone group and of *Kurier*, were sold by Funke Mediengruppe to SIGNA Holding GmbH. The latter is a property of René Benko, an Austrian real estate investor, which now owns just under a quarter of the largest and third largest daily newspapers in Austria.

Innovations by news organisations in 2018 include a new, monthly print edition focused on special themes by the non-profit, digital-born Addendum (controlled by Red Bull's owner Dietrich Mateschitz) and a regular magazine by the digital native Dossier, which raised the resources for the project through crowdfunding. Finally, the entire editorial staff of the digital-born Vice Austria, formerly composed of eight professionals, resigned after it became known that the Austrian edition would be managed from Germany. According to Editor-in-Chief of Vice Germany Laura Himmelreich, Vice Austria will not be downsized, but more resources will be invested in video production.

Sergio Sparviero and Josef Trappel

University of Salzburg

With the collaboration of Stefan Gadringer, Roland Holzinger, and Isabella Nening

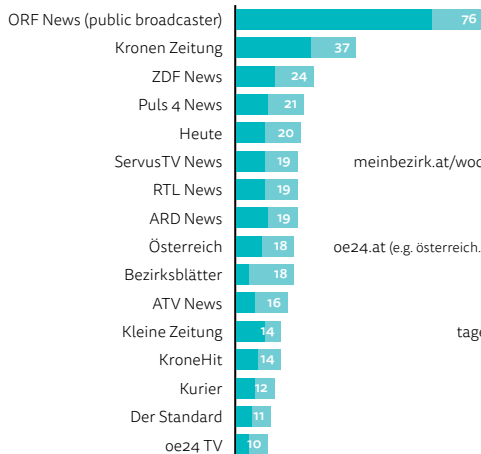
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



ONLINE

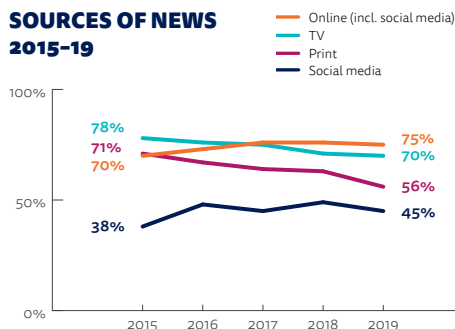


- ALSO**
- Unzensuriert 4%
 - Kontrast 3%
 - Contra Magazin 2%
 - Info Direkt 2%
 - Alles Roger? 2%

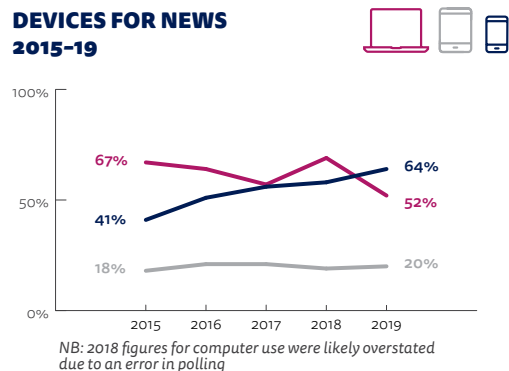
CHANGING MEDIA

Austrians have traditionally read more newspapers and magazines than any other country in our survey, but this is beginning to change. Online media now outstrips both print and TV with the smartphone (64%) overtaking the computer (52%) to become the most important device for accessing online news.

SOURCES OF NEWS 2015-19



DEVICES FOR NEWS 2015-19



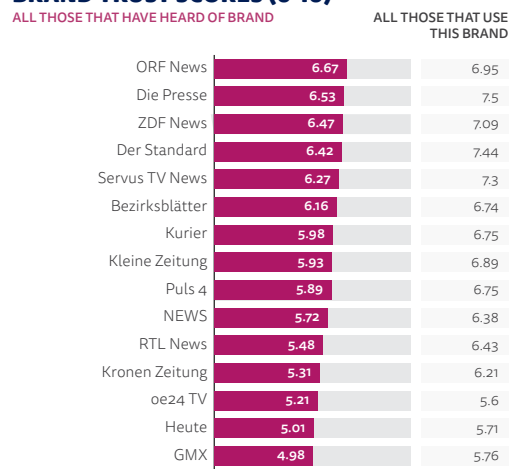
TRUST

Despite conflicts with government leaders, the public service media ORF remains the most trusted news service in Austria. Following the ORF are the German public service media ZDF, liberal, quality national newspapers, and regional and local news media. The most sold newspaper *Kronen Zeitung* is only ranked 12th in this list of the most trusted news media.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



9%
pay for
ONLINE NEWS

32%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
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2	WhatsApp	23% (+4)	72%
3	YouTube	23% (+4)	63%
4	Instagram	8% (+4)	28%
5	Facebook Messenger	6% (-)	32%
6	Twitter	4% (-)	11%

33%
SHARE NEWS
via social, messaging or email

18%
COMMENT ON NEWS
via social or website

BELGIUM

Belgium has two distinct media markets – one French-speaking, the other Flemish. In these small markets, publishers continue to integrate their operations and focus more on digital platforms, though many still struggle to find sustainable revenue models.

After a round of mergers and acquisitions reshuffling the Belgian media landscape, 2018 saw Belgium's newly structured news publishers and media companies work behind the scenes to integrate their operations. These changes are most evident in Antwerp, with the construction of News City, a new home for the publisher De Persgroep and its newly acquired broadcast partner Mediaaan. This development brings together the newsrooms of commercial broadcaster VTM, the most popular newspaper/website in Flanders, *Het Laatste Nieuws*, news brands *De Morgen* and *Humo*, and a range of showbiz magazines. In a similar move, the publisher Mediahuis is centralising its activities, also in Antwerp, while moving the newsroom of *De Standaard* to Brussels. There will be around 80 job losses as a result, including 19 in newsrooms.

Meanwhile the French-language market remains equally pressured. A restructuring at *Les Editions de l'Avenir* has led to much commotion – two days of strikes followed the sacking of four journalists and rumours of a list of 30 journalists who were allegedly disposable put the issue on the agenda of the Walloon government.

Consolidation in the media sector continues to raise concerns about pluralism and media freedom. In its 2018 report, the Flemish Media Regulator pointed out that traditional media products are now in the hands of only five groups (including the public broadcaster), down from nine a few years ago. In Wallonia, three large publishers control the six remaining print titles. This is especially worrying as digital first initiatives, which contribute to a more diverse news



landscape, continue to struggle to generate advertising or subscription revenues. After adding a membership paywall, Charlie Mag, a Dutch-language online magazine, is setting up a crowdsourcing initiative, the success of which will determine the future of the outlet. On the French-speaking side, long-form print magazine *24h01* closed in March 2019. Investigative outlets such as Apache and Médor are still operating, but their viability remains fragile. One bright spot is the federal government's announcement that the 0% VAT rate that has been applicable to print newspapers and magazines for decades will soon be extended to digital news publications.

Readership for news brands has remained stable over the past four years, in terms of combined print/digital reach. But as the survey's data show, print is still losing ground year after year, with television also now seeing a slight decline. This resonates with the findings of the Digimeter survey, which suggests that daily live television viewership in Flanders was just 48% in 2018, down from 60% in 2015.²⁸ This change raises concerns for overall advertising revenues, which will also have a knock-on in terms of budgets for news. A study commissioned by Flemish Minister of Media Sven Gatz, suggesting broadcasters, distributors, and media producers collaborate on a 'Flemish Netflix', was welcomed with mixed feelings by many stakeholders.

In terms of new initiatives, 2018 seems to have been the year publishing brands decided to catch up on audio, with

STATISTICS

Population	11m
Internet penetration	94.4%

De Standaard expanding its offering from two to five weekly podcasts and Rossel and IPM collaborating through a Google DNI grant on Askinfo, a common platform aimed at distributing written articles in an audio format, specifically through smart speakers.

Although examples of disinformation are rare in Belgium, the issue has featured on the political agenda. In early 2018, Federal Minister for Digital Agenda Alexander De Croo put in place an expert group on disinformation. As a result, a fund for fact-checking initiatives was promised but postponed after the government fell. In Flanders the Minister of Media set up a Flemish Journalism Fund of €500,000 to stimulate innovative journalistic projects – again two fact-checking initiatives were among the beneficiaries. While these are welcome, there is a risk that government subsidies will be scattered across various funds and programmes, diluting their overall impact.

Ensuring a sustainable and diverse mix of quality journalism remains a key political concern. To this end, the Flemish Parliament approved a resolution in March 2018 reaffirming its ambition to develop a forward-looking and media-agnostic way of supporting independent quality journalism.

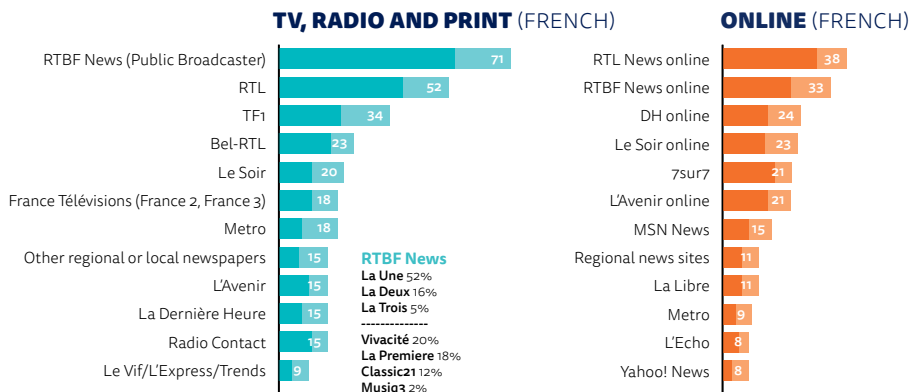
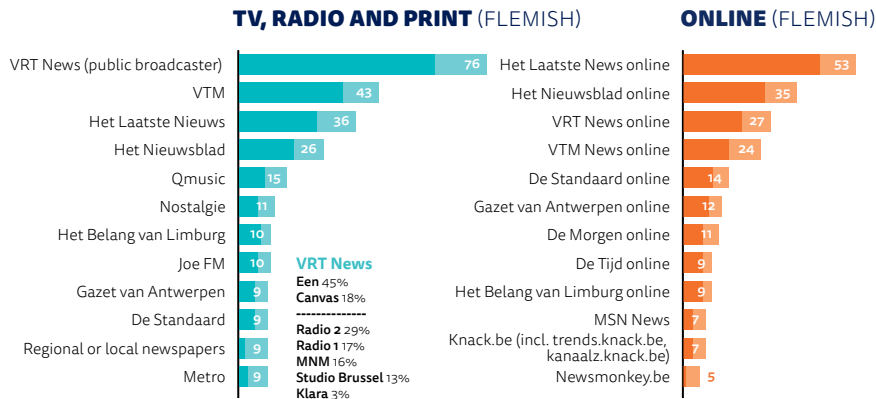
Ike Picone
Vrije Universiteit, Brussels

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

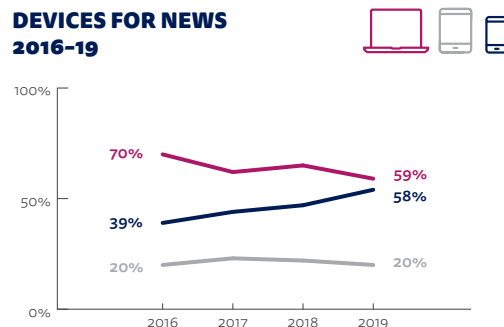
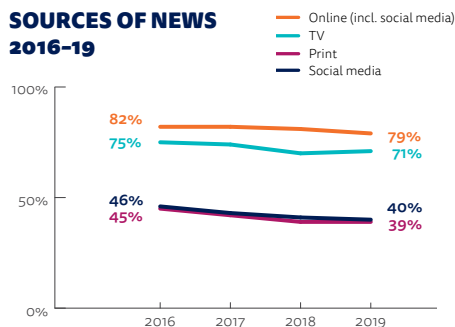
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



11% pay for **ONLINE NEWS**

Flanders 11%
Wallonia 11%

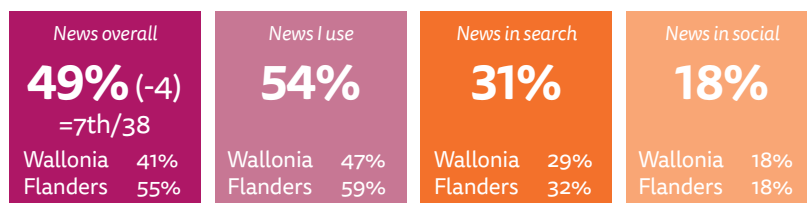
16% listen to **PODCASTS** in the last month



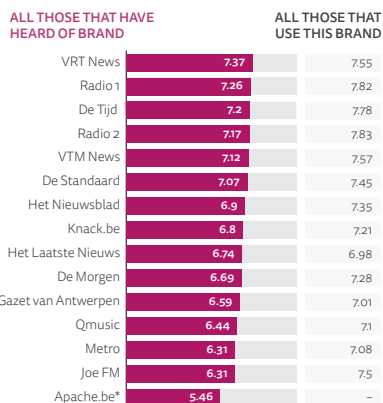
TRUST

News brands have traditionally enjoyed high levels of trust in Belgium, especially in Flanders. Remarkably, this year we see a drop in the score. There are recurring instances of both politicians and citizens adopting a harsher tone towards journalists. It is telling that the Flemish Association of Journalists has installed a complaints office for journalists who are a victim of verbal and physical harassment.

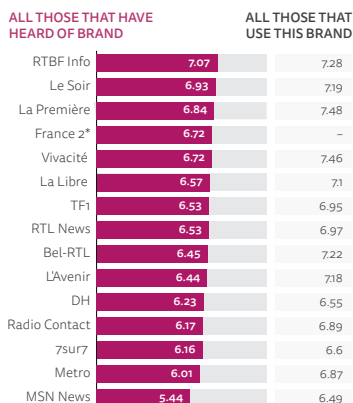
DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10) (FLEMISH)



BRAND TRUST SCORES (0-10) (FRENCH)



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	42% (+3)	70%
2	YouTube	17% (+1)	55%
3	Facebook Messenger	12% (+4)	46%
4	WhatsApp	10% (+2)	41%
5	Instagram	7% (+3)	27%
6	Twitter	4% (-)	10%

* Some brands do not have trust scores for users of those brands (did not meet minimum 50 threshold or did not specifically ask about the use of the brand)

BULGARIA

30 years after the fall of communism Bulgaria remains the poorest member of the European Union, with an increasingly polarised news media. Growing internet penetration and greater use of digital media represents some progress for a country with a rapidly ageing population.

It's the extreme polarisation of the media and the return of control by political parties which has defined the past 12 months. In the early 1990s, each political party had its own newspaper. Today they each have their own TV channel. This is partly because television remains such an important and influential source of news in Bulgaria. The links between stations and political parties range from shared business links and interests right through to direct ownership.

The ruling party, GERB, has developed the biggest network of influence. Evropa, a leading cable TV station, is managed by Georgi Harizanov, a disgraced former public servant who was publicly exposed for lying about his university education and has a conviction for racketeering.²⁹ He is also a tennis partner of the Prime Minister, Boyko Borisov, and frequently defends government policies.

Nova TV, a national private broadcaster which is currently the most trusted brand in our survey, is set to be acquired by one of the most influential and notorious Bulgarian oligarchs, Kiril Domuschiev. The businessman is a vocal supporter of the prime minister and his party, and frequently attacks its opponents. It was only the barring of the previous bidder by the competition regulator which gave Domuschiev the opportunity to buy Nova TV.³⁰

The opposition Bulgarian Socialist Party engages in similar practices. It launched its own channel, BSTV, which offers content of interest to the party and old movies from communist times. The nationalist parties which are GERB's coalition partners have two television stations, and Kanal 3 is close to the second



STATISTICS

Population	7m
Internet penetration	66%

largest opposition party in parliament, Movement for Rights and Freedoms.

Not only the TV stations but the media in general are also increasingly collecting and publishing 'kompromat' – compromising material such as video or photographs which embarrass political opponents or other public figures. Both the GERB and BSP use specific journalists as conduits for their own brand of kompromat.

Anton Todorov, the GERB's spokesman, had to resign after indirectly threatening a journalist on air in 2017. Since then he has specialised in publishing online 'investigations' which have all targeted GERB critics.

On the other side, the Socialists have Elena Yoncheva, a former war correspondent who is known for her reports from the Near East and North Africa conflicts. Her investigation into the government's failure to build an effective wall on the border with Turkey was prevented from being broadcast on the grounds of national security. Her more recent work accused a deputy minister of corruption but the State Prosecution declined to indict the politician, claiming the evidence was insufficient.³¹

It is unclear whether the party TV channels have affected trust in the news – up 2 percentage points on last year – but they have certainly increased the number of pundits and strongly expressed views on air. And in line with the 'back to the past' trend, just recently Radio Free Europe reopened its Bulgarian section. Employing a small number of journalists,

it is targeted at active internet users, and offers a morning podcast. Podcasts are proving to be fashionable, and a growing number of publishers and celebrities are producing them.

Newspapers in Bulgaria have come under considerable financial pressure in recent years, despite pioneering successful 'hybrid tabloid' newspapers such as *24 Chasa* and *Trud* in the 1990s. But low incomes and competition from the internet have led to a significant decline in readership and foreign investors have largely pulled out. Three daily newspapers have shut down over the past four years and economic weakness has left Bulgarian media increasingly reliant on funding from local oligarchs or foreign foundations.

The *Capital* weekly magazine remains the only Bulgarian publication which charges users for its online content. Investigative site *Bivol.bg* invites users to support it with donations. Payment for online news (7%) is amongst the lowest in our survey.

Internet penetration has risen in the last few years and a wide range of social platforms continue to gain in popularity, from Facebook (85%) to Viber (60%), a commonly used messaging platform in this part of Europe. These are significant developments in a country whose population is ageing the fifth most quickly in the world.

Stefan Antonov

Business journalist, (the Bulgarian) Economist, and former Reuters Institute Journalist Fellow

²⁹ www.24chasa.bg/novini/article/4052053

³⁰ www.novinite.com/articles/195306/Bulgarian+Businessman+Kiril+Domuschiev+Buys+Nova+Broadcasting+Group

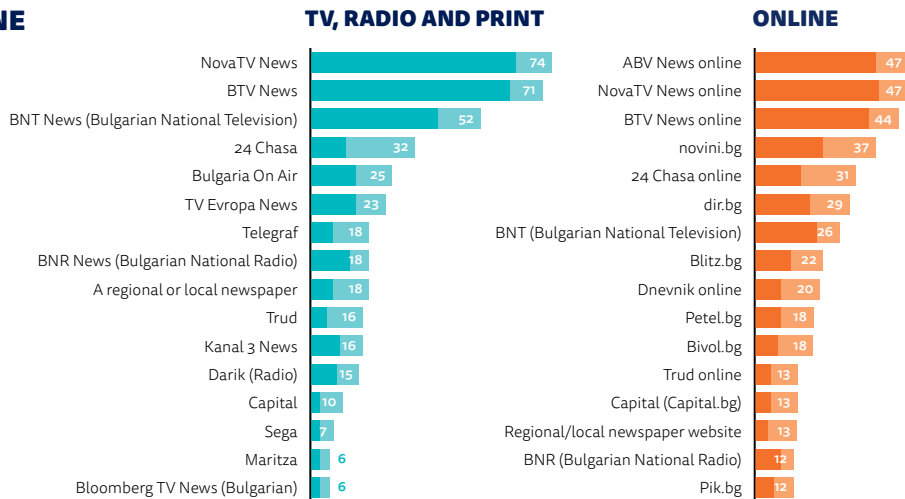
³¹ www.dnevnik.bg/bulgaria/2019/04/12/3418591_prokuratura_ne_nameri_dokazatelstva_sreshtu_ministur/

WEEKLY REACH OFFLINE AND ONLINE

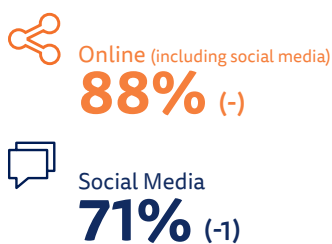
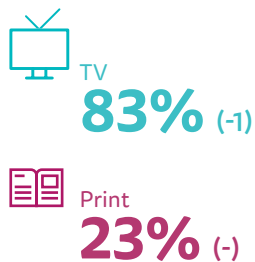
TOP BRANDS

% Weekly usage

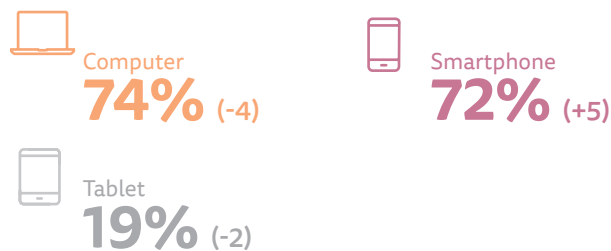
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



SOURCES OF NEWS



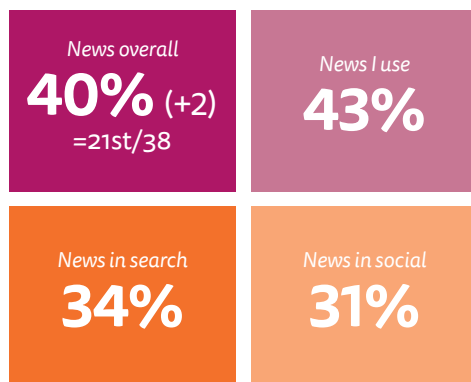
DEVICES FOR NEWS



TRUST

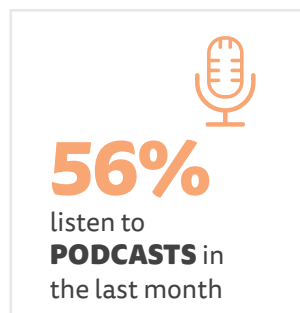
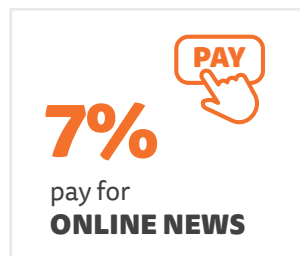
Many news organisations in Bulgaria have become reliant on funding from oligarchs or foreign foundations. This in turn has reduced independence and trust, with the media increasingly becoming something of a battlefield between Russia and the West. Public broadcaster Bulgarian National Television (BNT) is less popular in terms of reach than commercial rivals, but remains the most trusted for news in our survey.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
Bulgarian National Television	7.35	7.81
Bulgarian National Radio	7.33	8.18
Nova TV News	7.15	7.49
BTV News	7	7.41
24 Chasa	6.33	7.14
Trud	6.12	7.1
Dnevnik	6.08	6.75
Bivol.bg	5.89	7.71
Sega	5.71	6.97
Offnews.bg	5.59	6.49
Blitz.bg	5.18	5.8
Pik.bg	4.6	5.19



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	74% (+1)	85%
2	YouTube	34% (+2)	71%
3	Facebook Messenger	20% (+2)	60%
4	Viber	16% (+2)	60%
5	Instagram	10% (+5)	26%
6	Twitter	6% (-)	13%



CROATIA

The Croatian media market is characterised by strong commercial television providers, a print sector trying to adapt to the digital ecology, and a vibrant mix of traditional and alternative online websites. It has recently been marked by threats to journalistic independence in the public and third sector media.

The negative trend in regard to media independence started in 2016 soon after the election of the HDZ governing coalition. Particularly troublesome is the editorial policy of the HTV (Croatian television, the public service broadcaster) with its pro-government and new Christian conservative bias (pro-government bias was generally not present from 2000 to 2016). Public outrage was caused when legal action was brought by the public broadcaster against its own journalists who were publicly critical of its non-pluralistic editorial policies.

In March a few thousand journalists and citizens marched in Zagreb in support of media freedom and journalistic independence after the Croatian Journalist Association (HND) highlighted 1,160 lawsuits that had been taken out by politicians and public figures against journalists in the course of their work. The Association has demanded that the government work to stop this practice, seen by the journalists as harassment, and guarantee the autonomy of editorial and journalistic work from media owners.³² The Croatian Journalist Association was awarded the Miko Tripalo Democracy Prize for their contribution to democracy in Croatia in 2018 by the Centre for Democracy and Law Miko Tripalo, a progressive think-tank.

Government is also criticised for not distributing the funding for the non-profit media sector earmarked several years ago by the EU Social fund. The 2016



government cut the support to third sector media awarded by the previous social-democratic government. This is also interpreted as a move against media pluralism, as non-profit media are predominantly progressive. A government media strategy has been promised for some time but its unveiling has been constantly postponed. Strong action was announced against misinformation and hate speech on the internet, but no proposals were presented amidst anxieties that censorship might be introduced unwittingly.

While there have been no significant changes in the ownership of national-level media, it was recently revealed that Viktor Orbán's favourite media baron, a member of the government-promoted Central European Press and Media Foundation KESMA which now controls much of the media in Hungary, is interested in buying a local television in Zagreb (Z1). Media companies from KESMA acquired parts of the Slovenian and Macedonian media in 2016 and 2017, and supported far-right candidates and parties in the election campaigns. Any similar move in Croatia would be viewed with great concern in the light of upcoming presidential and parliamentary elections for 2019 and 2020, respectively.³³

Print circulation continued to fall by 10% in 2017 across the board, with the two main press companies maintaining their relative shares. Styria, with some

STATISTICS

Population	4.2m
Internet penetration	91%

50–60% of the audience market, includes the tabloid daily *24 sata* and *Večernji list*. Hanza media, which owns popular daily *Jutarnji list* and the regional daily *Slobodna Dalmacija* has some 30–40% share of daily newspapers and 40–50% in the magazines market.³⁴ According to the Croatian association of advertising agencies, total advertising revenues (€196.4m) decreased slightly in 2017, the latest year for which we have data, though internet advertising increased by 14.5%.³⁵

Public broadcaster HRT is funded by advertising and a licence fee. It faces stiff competition from private networks, including leading national station Nova TV. HTV has kept its third place as source of offline news, but TV reach is down 3% from last year, while its radio branch HR slipped by 2%. HTV's two commercial rivals retained their positions – Nova TV is at 59%, the top source of news offline and online in Croatia, and the television branch of the Croatian RTL is in second place, one point down from 2018 (58%). N1, the 24-hour news channel, has also maintained its share and rank.

The growth of podcasts is a new development with around a third (37%) accessing at least once a month – with more than one in ten using podcasts relating to news and information.

Zrinjka Peruško

Centre for Media and Communication Research, University of Zagreb

³² Osam zahtjeva protiv cenzure, 1 Mar. 2019. www.hnd.hr/osam-zah-tjeva-protiv-cenzure1

³³ Berislav Jelinić, Orbanova medijska hobotnica preuzima Z1, 19 Feb. 2019. No. 1087, pp. 8–12, www.nacional.hr/orbanova-medijska-hobotnica-preuzima-z1/

³⁴ Agencija za zaštitu tržišnog natjecanja, www.aztn.hr/24-sata-prvi-na-trzistu-prodaje-jutarnji-list-na-trzistu-oglasavanja-u-dnev-nim-novinama-a-7-dnevno-i-medi-murjenajprodavaniji-o

³⁵ hura.hr/istrazivanja/medijska-potrosnja-u-hr

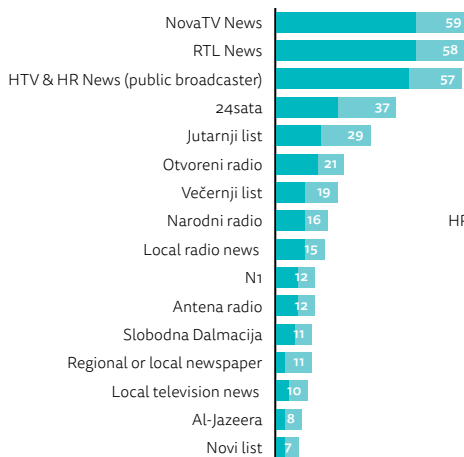
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

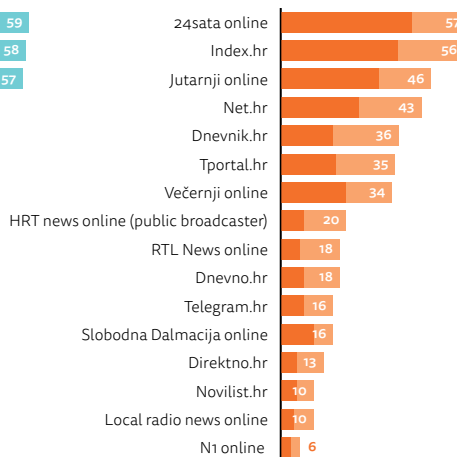
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



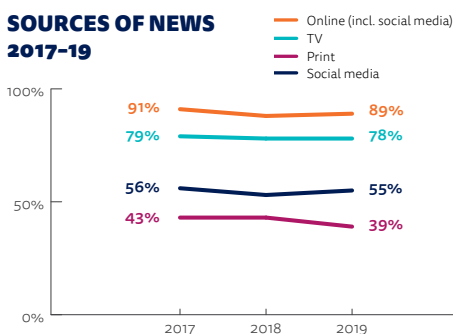
ONLINE



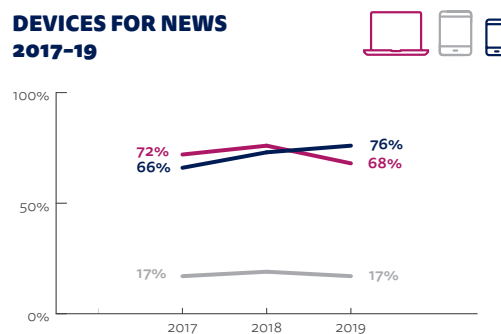
CHANGING MEDIA

Internet penetration in Croatia is now over 90% and this growing connectedness is also reflected in smartphone use – 76% use the device for news weekly. Croatians also love their social networks with Facebook, YouTube, WhatsApp, and Viber most regularly used for news.

SOURCES OF NEWS 2017-19



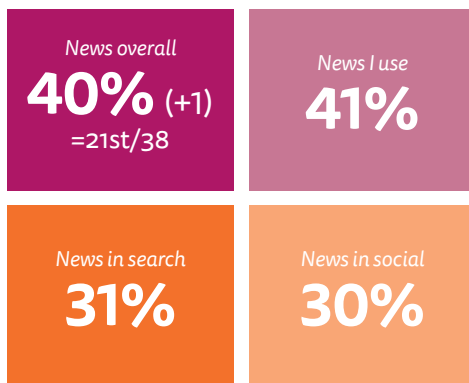
DEVICES FOR NEWS 2017-19



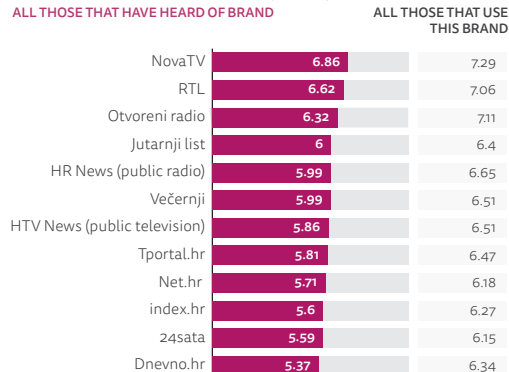
TRUST

Trust in the media remains stable with the ranking of media brands similar to last year. The most trusted news sources are two commercial TV stations (both foreign owned), alongside two main daily newspapers and the public service radio. The tabloid 24sata has a lower trust score along with the more politically inclined portals – Dnevno.hr on the right, and Index.hr on the left.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



6% pay for **ONLINE NEWS**

37% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	56% (-1)	75%
2	YouTube	28% (-)	77%
3	WhatsApp	14% (+3)	56%
4	Viber	13% (+1)	59%
5	Facebook Messenger	12% (+1)	53%
6	Instagram	10% (+4)	34%

40% **SHARE NEWS** via social, messaging or email

25% **COMMENT ON NEWS** via social or website

CZECH REPUBLIC

STATISTICS

Population	10.6m
Internet penetration	88%

The Czech media market has experienced further ownership concentration with control shifting towards domestic tycoons, who have been also expanding abroad. Czech digital platforms are stepping up original content production, while concerns about the political independence of public service media are growing.

Under favourable economic conditions (GDP +3.0%), the Czech media market has continued to grow in 2018, with advertising expenditures rising by 10%. As in 2017, online adverts recorded the biggest annual growth (23%), attracting for the first time more expenditure than print and radio combined, and amounting to 25% of the advertising market altogether. Nevertheless, the dominant position of TV is still far from being challenged (46%).³⁶

There has been a further drop in the circulation of daily press, as publishers sold on average 7% fewer copies than last year, an indication that the relative slowdown of the decline between 2016 and 2017 (-5.5%) was only a temporary one.³⁷ The decline was driven particularly by print subscriptions (-11%), and was observed across all individual titles, with the exception of the financial daily *Hospodářské noviny*. The market shares of the five leading publishers – with the first three controlling 85% of the daily press market – remained virtually unchanged. Nevertheless, a further concentration of the print market took place following the withdrawal of Bauer Media, which was purchased by Mafra, a publishing house once controlled by the Czech Prime Minister Andrej Babiš.³⁸ Apart from Mafra becoming the number one publisher, this move has marked the near-completion of the process of print media takeover by domestic businessmen – a notable change from several years ago when foreign investors dominated the market.

A shift in favour of domestic ownership occurred within the radio market, too,



when the French company Lagardère sold its assets – the nationwide commercial stations Frekvence 1 and Evropa 2, and several other local stations – to Czech Media Invest, controlled by one of the richest Czech businessmen Daniel Křetínský. The transaction involved Lagardère's radio stations in other Central and Eastern European countries, as well as its many French magazines, including the popular brand *Elle*. Křetínský's expansion in the French market continued with the purchase of the news weekly *Marianne* and a minority stake in the legacy newspaper *Le Monde*, which sparked concerns about the impact on editorial autonomy among French journalists. Together with the acquisition of leading telecom operators in Hungary, Serbia, Bulgaria, and Montenegro by the Czech investment group PPF, owned by another billionaire Petr Kellner, these investments symbolise rising power as well as appetite of the Czech business tycoons to extend their media empires beyond national borders.

Amid the overall pessimism in the print market, there was a sign of hope in the launching of a new liberal daily at the end of 2018. *Deník N* was established following a crowdsourcing campaign, and benefited from close cooperation with its Slovak counterpart *Denník N*. Having started as an online daily, *Deník N* added a print version from the beginning of 2019, emboldened by an increasing subscriber base.

The fast-growing online TV market has been further expanded with the emergence of Mall.tv, established by the second biggest Czech internet retailer Mall.cz. Offering original content – films,

series, and talk shows – the Czech retailer clearly takes inspiration from Amazon. It is attempting to compete with the leading Czech online portal Seznam.cz which has been involved in TV content production for several years already with its online service Stream.cz and, since last year, terrestrial SeznamTV. The growing interest of Czech audiences in new forms of online consumption is also seen in the rising popularity of podcasts, spearheaded by independent producers but also involving some established brands such as Czech Radio and *Forbes*.

The increasing politicisation and more explicit partisanship of the Czech news media have been reflected in the intensification of struggles for political independence of the public service broadcasters. These have been targets of regular criticism and attacks by the governing party as well as by the President.³⁹ Despite the rising political hostility, public service broadcasting as an institution can still rely on substantial support from the Czech public. This was seen several times during 2018 when people took to the streets to protest against attempts to curb the independence of Czech Television and Czech Radio. Both broadcasters also – yet again – top the list of news brands in their perceived trust by Czech audiences.

Václav Štětka
Loughborough University

³⁶ www.spir.cz/28-6-miliard-korun-investovali-zadavatele-do-internetove-reklamy-v-roce-2018-vice-nez-polovina

³⁷ www.mediaguru.cz/clanky/2019/02/prodej-deniku-loni-ovlivnil-i-problem-s-predplatnym

³⁸ www.reuters.com/article/czech-media/czech-pms-former-firm-buys-bauer-media-groups-local-publisher-idUSL8N1WP4AX

³⁹ www.to.org/client/article/27653-the-battle-for-czech-public-media.html

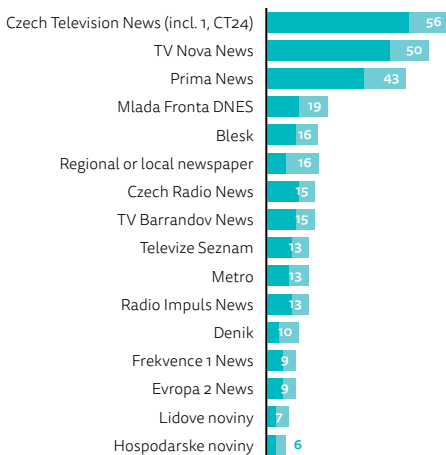
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

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TV, RADIO AND PRINT



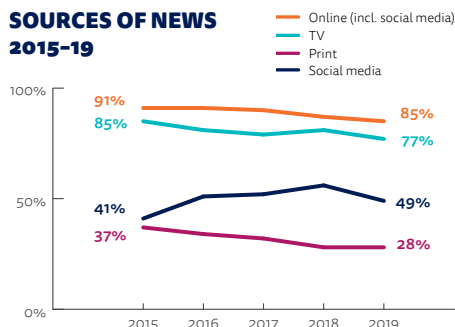
ONLINE



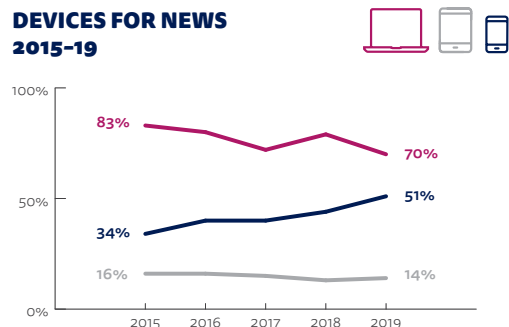
CHANGING MEDIA

Smartphones have continued to rise as the second most popular device for accessing news, while the use of tablets has further stagnated. However, the consumption of news on social media has declined compared to 2018, particularly on Facebook (-7%).

SOURCES OF NEWS 2015-19



DEVICES FOR NEWS 2015-19

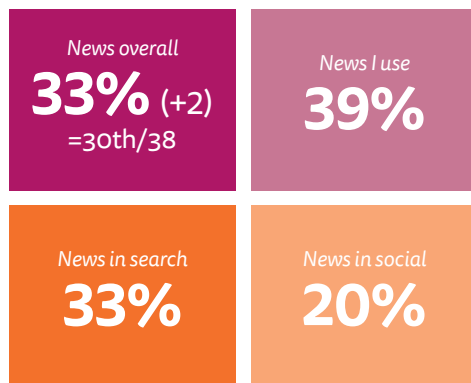


NB: 2018 figures for computer use were likely overstated due to an error in polling

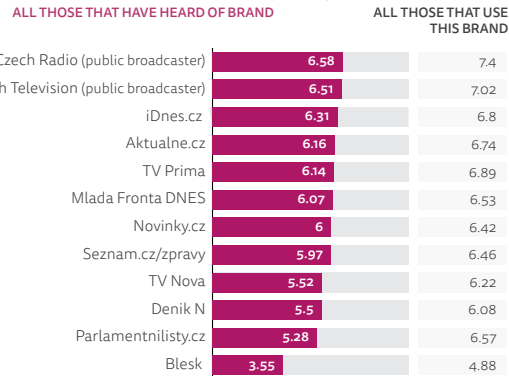
TRUST

The tendency towards declining trust in news, recorded in previous years, has been stopped and slightly reversed, even if the overall trust figures are still comparatively low. Public broadcasters remain most trusted by the public while tabloids and partisan brands are trusted least.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



7% pay for **ONLINE NEWS**

37% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	50% (-7)	75%
2	YouTube	26% (-)	65%
3	Facebook Messenger	17% (+1)	51%
4	WhatsApp	10% (+3)	32%
5	Instagram	8% (+4)	23%
6	Twitter	4% (-1)	9%

37% **SHARE NEWS** via social, messaging or email

22% **COMMENT ON NEWS** via social or website

DENMARK

Denmark's media are adjusting to significant changes and reductions in funding to public service broadcasting along with increased subsidies for private media, both introduced by a right-wing government.

In a break with traditions of broad political compromises about media regulation, in June 2018 Denmark's government introduced a controversial media settlement for the next five years. Denmark has two public broadcasters, DR and TV2, and a national and local press partly supported by state subsidies, and the changes reduce total public funding of media by €54m.

The specific changes involve a 20% funding cut for the main public service provider, DR, from €508m to €415m in 2023. At the same time, the press subsidy programme gets extra money, which will benefit online and local media. A fund that gives private media support for specific public service content is boosted from €4.7m to €13.3m. Finally, there is a requirement for the new holder of the radio franchise FM4 (currently run by Radio 24syv) to move its headquarters at least 110 km from Copenhagen.

The settlement for DR will reduce staffing by 375 jobs (85 in news), reduce its number of TV channels from six to three, and cut radio channels from eight to five. The contract forbids the production of long in-depth text-based news articles online, intended as a measure to strengthen private news organisations' competitive power. Cuts will affect entertainment, sport, and imported drama more than news.

Opposition parties say they are prepared to roll back parts of the government's legislation if they come to power after this year's general election, saying they would aim to restore the strength of public service media and to curb the influence of international tech giants.

In print, most national and regional newspaper readership continued to drop by 10% or more on weekdays and 3–15% on Sundays (industry figures). But niche newspapers *Information* and *Kristeligt*



Dagbladet saw increases of just under 10%. *Politiken's* Sunday edition also increased readership by 10%. Advertising revenues for print newspapers dropped 14% in 2018.

Since February 2019, the key TV news providers have been competing head-to-head for late-night news viewers, after TV2 Nyhederne moved its 10pm newscast to 9.30pm. DR so far has kept its audience share, and before TV2's announcement had already decided to move its bulletin to 9pm in 2020.

The tabloid *BT* and free daily *MetroXpress* were partly merged in April 2018. Online newsletter *Føljeton* has barely reached the break-even point. Long-read and in-depth news digital publisher *Zetland* still runs a substantial deficit. One strategy to counter these difficulties has been to produce audio versions of articles, a path also taken by the free politics-focused online newspaper *Altinget*, and big mainstream news media like *Politiken*.

Concerns over the possible growth in misinformation during the national elections has led news magazine *Mandag Morgen* to set up a fact-checking unit. It will collaborate with Facebook about intercepting misinformation.⁴⁰

Payment for online news has stagnated at 15% since 2017. All major newspapers use freemium models online, and are struggling to increase payment levels. In 2018 major newspapers priced online subscriptions at around €35 per month, the main exception being *Berlingske* with its €15 offer.

The state subsidy is given to private news media in relation to the number

STATISTICS

Population	5.8m
Internet penetration	97%

of journalists they employ, the social diversity of their readership, and the amount of democratically important political and cultural content they create. Niche nationals receive an average subsidy of €3.3m; broadsheet and tabloid national dailies €2.3m; regional dailies €1.6m; local dailies €400,000; online native sites €500,000.

It is still proving hard to run sustainable news media targeting children and young adults. Young people have less brand loyalty and prefer multiple sources or aggregators with a blend of several brands.

In 2018, *Berlingske* closed its Kids News (printed weekly, 6–12 years). *JP/Politiken* closed *Format* (online, 20-to-30-year-olds) after just eight months, partly due to disappointing user referrals from Facebook. Similarly *Vice* (online, 20-to-30-year-olds) launched its youth-oriented online news magazine in May 2018 only to close it in February 2019. The market still includes print weeklies for 9-to-12-year-olds, online news for teenagers, online videos for 20-to-30-year-olds, and daily podcasts, some of which receive a public subsidy.

Danes use social media less for news than many other countries. Facebook plateaued in 2019, while Instagram and WhatsApp are relatively new on the Danish media scene. DR News, niche financial newspaper *Børsen*, and born-online, political news-oriented *Altinget* have begun to cautiously explore morning chatbot newsletters and alerts on Facebook Messenger.⁴¹

Kim Christian Schrøder and **Mark Ørsten**
Roskilde University

⁴⁰ Mediawatch, 27 Sept. 2018.

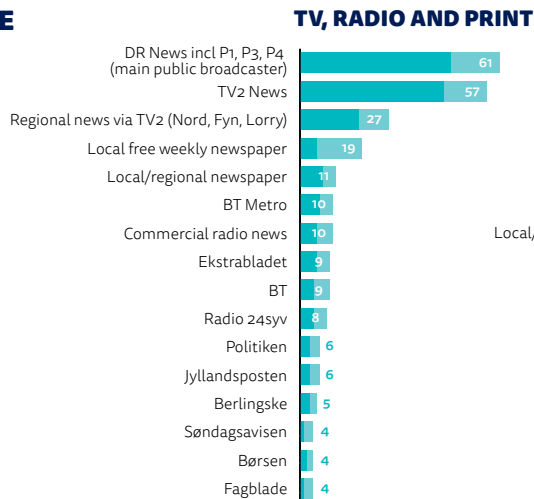
⁴¹ Mediawatch, 13 Aug. 2018.

WEEKLY REACH OFFLINE AND ONLINE

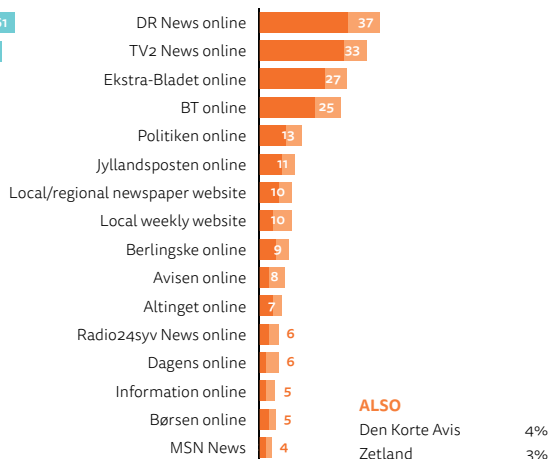
TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



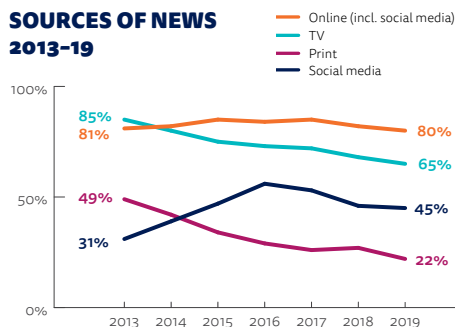
ONLINE



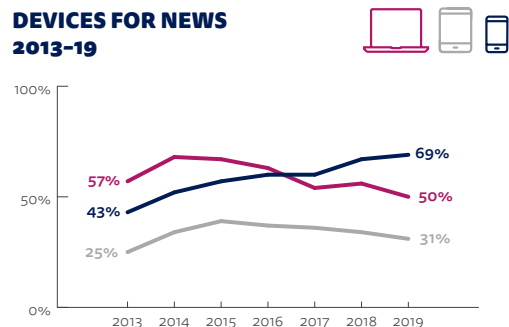
CHANGING MEDIA

In 2019 there is a continued move away from accessing news on computers and tablets towards smartphones. More than two-thirds of the Danes now use their smartphones to access news.

SOURCES OF NEWS 2013-19



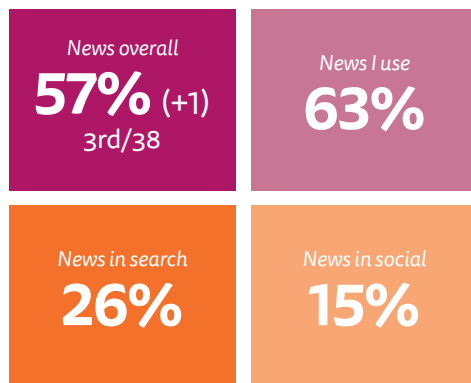
DEVICES FOR NEWS 2013-19



TRUST

News trust levels are slightly up on last year, in contrast to many other European countries. Public broadcasters DR and TV2 still carry the most trust with popular tabloid Ekstra Bladet and extreme-right Den Korte Avis trusted least by the Danish public.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



15% pay for **ONLINE NEWS**

24% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	36% (+2)	75%
2	YouTube	9% (+3)	53%
3	Facebook Messenger	8% (+1)	52%
4	Instagram	6% (+2)	36%
5	Twitter	5% (-)	11%
6	LinkedIn	5% (+1)	19%

19% **SHARE NEWS** via social, messaging or email

12% **COMMENT ON NEWS** via social or website

FINLAND

The news media environment in Finland is characterised by a strong regional press, a strong public broadcaster (Yle), one widely read national daily (*Helsingin Sanomat*), and two popular evening tabloids, both reaching over half of the adult population. Finnish news media remain the most trusted in our survey.

A small number of publishers dominate the news market as both the Finnish language and small market seem to shield national news brands somewhat against international competition. Finnish news brands also do well in terms of reach because there is still plenty of free online content available (especially the evening tabloids and Yle), and a strong Finnish reading tradition. Despite this, news reach in most sources is slowly declining as entertainment media such as Netflix and Spotify compete for people's time.

Newspaper circulations have continued to decline, which is a serious problem because most of their revenue still comes from print. Finnish newspaper publishers have smoothed their print-readers' way into digital by offering bundled subscriptions at a similar price – or just a little higher – as print-only subscriptions. This strategy has made bundled subscriptions quite popular in Finland. At the same time, they have tightened their online paywalls and tried to sell digital subscriptions. While a few publishers have had some success with this strategy⁴² – *Helsingin Sanomat* now has around 100,000 digital-only subscribers and more than 300,000 overall – less than one-fifth of the adult population (16% last year) overall has paid for online news.

The current trend in paywalls is a mixed model in which people can read a few stories free while some premium content is only available to subscribers. When people come up against a paywall, they are often offered a free trial or low-cost subscription. There are also some experiments with micropayments.



STATISTICS

Population	5.5m
Internet penetration	94%

For example, *Karjalainen*, a regional newspaper, sells 24-hour access to its site to those sending a 95 eurocent SMS.

The government's decision to decrease VAT for digital media from 24% to 10% (the same as for subscribed print media) will probably accelerate the change from print to digital and make investing in online services more attractive for publishers.

Finland has always tracked as the country with the most trusted news media in the *Digital News Report* (59% this year). This is probably due to the Finns' general trust in social institutions and the fact that the mainstream news media are not politically divided. It seems, though, that even in Finland things are slowly changing. Overall trust in the news is now down 9 percentage points from 2015, though trust in 'news I consume' dropped only 2 percentage points.

The widening gap between trust in news overall and 'news I consume' might indicate some kind of polarising trend. Social topics from immigration to wolf-hunting have recently led to heated public debates and accusations of bias against established media. In a 2016 survey, 71% of those supporting the nationalist True Finns party said they had 'lost their trust in traditional media', while among all Finns only 38% agreed with that statement.⁴³ Another explanation is that the public discussion about fake news has made people more aware of the potential unreliability of news – while they still broadly trust the mainstream news media.

There is a small nationalist and anti-immigration alternative media scene in Finland, which actively engenders distrust

in legacy media. The most well-known of these is *MV-lehti* (4% weekly reach), whose founder was recently sentenced to jail for publishing material which was found to be both libellous and racist. There is an appeal pending. *MV-lehti* operates now with a new leadership.

Podcasts seem to have gained ground in Finland over the last year, and many newspaper companies have started podcasts of their own. Sometimes the initiative has come from individual journalists. Regional newspapers *Aamulehti* and *Satakunnan Kansa* started podcasts about sports in autumn 2018 while *Helsingin Sanomat* continued its political commentary podcast *Uutisraportti* (News Report) that already has a quite established position.

The national news agency STT strengthened its position after a period of economic difficulty. The government granted it a €1.5 million subsidy and Sanoma increased its ownership of STT to 75% by buying Alma Media's and TS-Group's shares. Sanoma also announced that *Helsingin Sanomat* will start using STT's services again.

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University of Tampere, Finland

⁴² Media Audit Finland circulation data, <http://mediaauditfinland.fi/levikit/tilastot>

⁴³ vipepister.puheenvuoro.uusisuomi.fi/218550-vihreat-tyytyvaisia-mediaan-perussuomalaiset-pettyneita

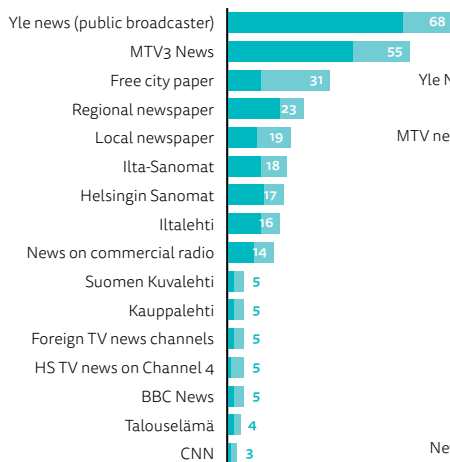
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

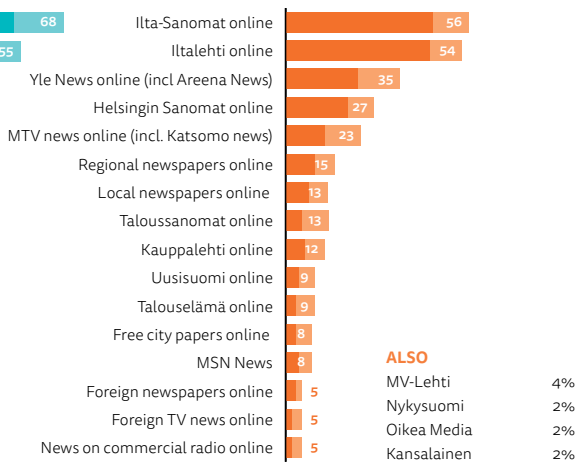
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



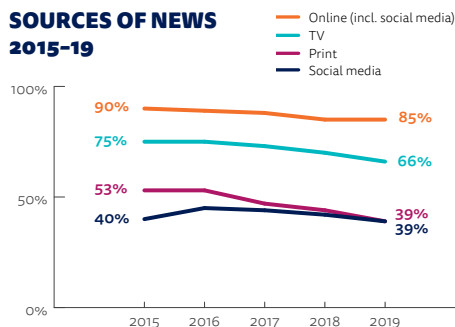
ONLINE



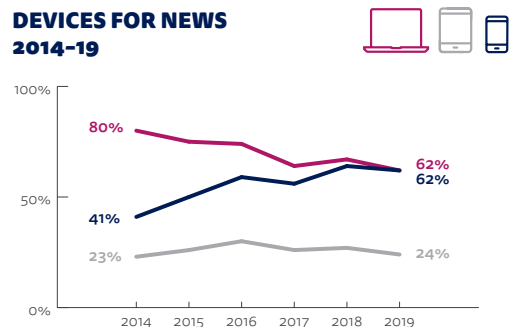
CHANGING MEDIA

The weekly reach of all sources of news is either declining or flat, which may be because other media are increasingly competing for people's time. Meanwhile the smartphone is rapidly increasing its importance. 62% of Finns now use the smartphone for news weekly, with 43% of Finns saying it is their main device, compared with 39% in 2018.

SOURCES OF NEWS 2015-19



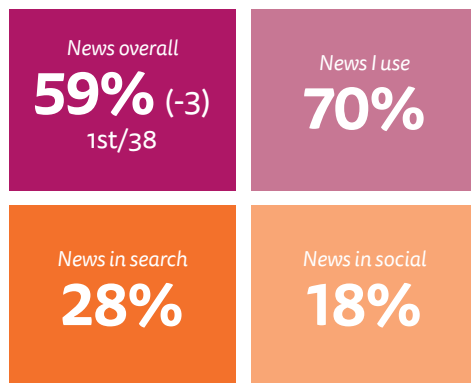
DEVICES FOR NEWS 2014-19



TRUST

Even in Finland, trust in news is slowly declining. This may be because of polarising tendencies in this traditionally consensual and trustful society, or because the debate about so called 'fake news' has undermined trust in news overall. The national broadcasting company Yle retains its position as the most trusted media in Finland.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



16% pay for **ONLINE NEWS**

26% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	30% (-3)	68%
2	YouTube	14% (-1)	67%
3	WhatsApp	10% (-)	61%
4	Twitter	8% (+1)	16%
5	Instagram	6% (+2)	37%
6	Facebook Messenger	6% (+1)	39%

27% **SHARE NEWS** via social, messaging or email

15% **COMMENT ON NEWS** via social or website

FRANCE

Recent months have been marked by a persistent and troubled wave of protests in France known as the Yellow Vests movement. On the ground, journalists have been insulted and attacked while the news media itself has suffered the biggest fall in trust in years.

The Yellow Vests protests, which began in autumn 2018 and has led to widespread violence on the streets, show no sign of running out of steam. The protesters have no identifiable leader, structure, or coherent agenda which has made it hard for journalists to tell their story. And yet the protestors consider the media to be part of the problem – critical of their movement and over-supportive of the government. Reporters have faced verbal and physical attacks, with a number thrown to the ground and even mugged. French journalists have likened covering the protests to reporting from a war zone.

Despite the violence, the Yellow Vests continue to attract public support. Many citizens believe the media have sensationalised events and have interviewed polarised or extreme witnesses. As a result, we see a large fall in overall trust in the news to just 24%, one of the lowest in our survey.

But here's the paradox: BFM TV, which has been broadcasting breaking news and information since 2005, is at the same time the most criticised channel and one of the most popular in France (see data on opposite page). Reporters working for BFM TV now use a no-logo microphone windscreen so the brand will not be easily identified and are protected by security guards when they report live.

The protests have largely been organised through social media, including through private and public Facebook Groups. Kremlin-funded RT France also helped sustain the movement through extensive broadcast coverage – supplemented by unmediated Facebook Lives. Our data show 3% using RT France online weekly and even higher usage (7%) from heavy social media users. President Macron has described RT as a tool for 'influence-



STATISTICS

Population	65m
Internet penetration	93%

peddling'. Draft French legislation to combat what the government considers 'fake news' includes provisions to take foreign broadcasters off the air if they attempt to 'destabilise' the country.⁴⁴

In response to the Yellow Vests' demands, President Emmanuel Macron and his government have organised the 'Great National Debate', a chance for citizens to input ideas to improve quality of life in France. More than 1.9 million contributions were submitted online and about 10,000 nationwide discussions were held.

Emmanuel Macron has also been on the defensive over the behaviour of his former security officer. Alexandre Benalla was sacked by the President after *Le Monde* revealed that he attacked a protestor during May Day demonstrations in Paris. Several months later, the subscription-based investigative publication Mediapart revealed that he'd been unlawfully using diplomatic passports.

While the French State has been pushing for a EU-wide tax on the big tech companies, many news organisations in France continue to struggle financially. The French news agency AFP (Agence France-Presse), is looking to lose almost 100 staff. At *L'Express*, the weekly newspaper created in 1953, 40 journalists are set to leave after unsuccessful attempts to charge for online content. But others are faring better. *Le Monde* grew digital subscriptions by 20% to 180,000 following a redesign and increasing the number of articles behind its paywall.⁴⁵

Meanwhile public broadcaster France Télévisions is under mounting pressure, with falling audiences and government

demands for greater efficiency. In a major restructuring plan they are getting rid of 2,000 out of 9,600 staff and have a plan to create more programmes that might attract younger audiences. Meanwhile the French are shifting their allegiances to online video services, with Netflix reaching 5m subscribers and Orange, one of the biggest telecom providers, making significant investments in original programming. One French minister, Gérald Damarnin, has suggested going even further and abolishing the 'audio-visual fee', which funds French public media – a tax of €139 per year for those that own a TV.

Another blow to trust came in February when a number of senior French journalists were suspended or fired for allegedly co-ordinating online harassment via a private Facebook group. The largely male 'Ligue du Lol' mocked women, including other journalists, using pornographic images and jokes about rape. The story was uncovered by the French daily *Libération*, many of whose journalists were involved, and became something of a MeToo moment. Many journalists hope the revelations will help to clean up decades of sexism and out-of-date habits in French newsrooms.

Meanwhile, podcasts (25%) are still engaging French listeners, exploring soft news angles and gender issues, especially those produced by female journalists.

Alice Antheaume

Executive Director,
Sciences Po Journalism School

⁴⁴ www.rferl.org/a/france-warns-rt-claims-broadcast-syrian-chemical-weapons-attack-douma/29326822.html

⁴⁵ www.digiday.com/media/le-monde-site-tweaks-helped-increase-subscriptions-20-percent-2018

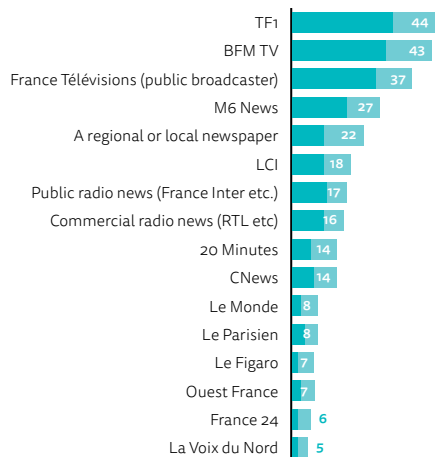
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

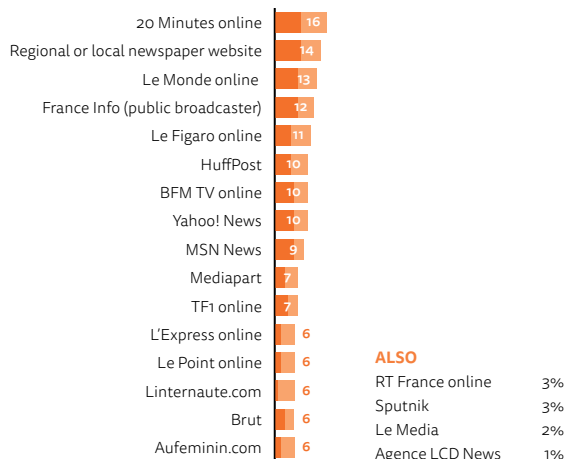
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



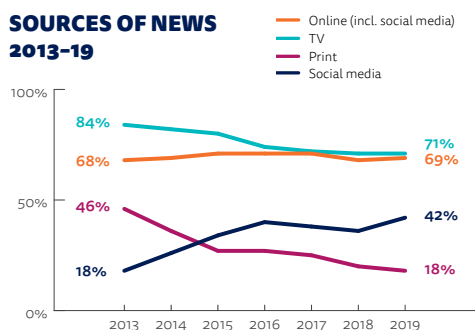
ONLINE



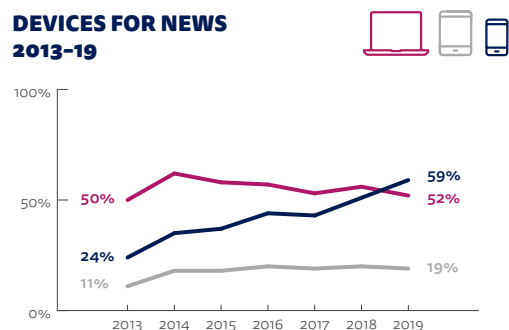
CHANGING MEDIA

TV news reach continues to decline even if people still turn to this medium during moments of national crisis. The Yellow Vests protests have also boosted use of social media for news (42%) while French people are more likely to access news from a smartphone than a computer for the first time.

SOURCES OF NEWS 2013-19



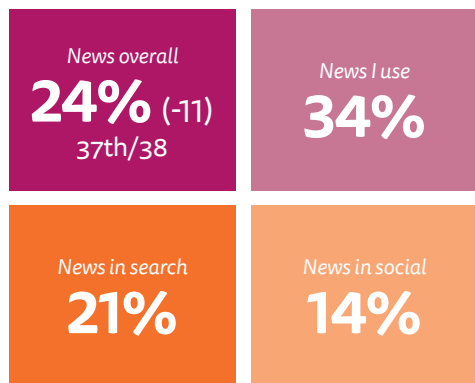
DEVICES FOR NEWS 2013-19



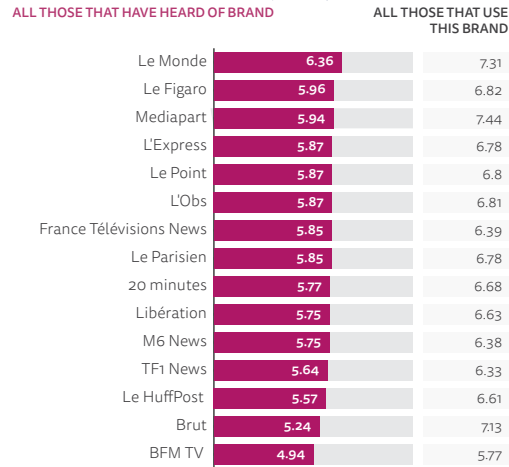
TRUST

Trust in news in France is now the lowest (24%) in Europe – hit by coverage of the Yellow Vest protests. Trust in the 24-hour channel BFM has fallen from 5.9 to 4.9 (on a ten-point scale) over the past year and is now the least trusted brand in our list. Social media are also blamed (14% trust score) for spreading conspiracy theories, bias, and algorithmic filtering.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



9%
pay for
ONLINE NEWS

25%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	46% (+5)	66%
2	YouTube	24% (+2)	54%
3	Facebook Messenger	13% (+3)	38%
4	Twitter	9% (-)	17%
5	Instagram	8% (+3)	24%
6	WhatsApp	8% (+2)	24%

30%
SHARE NEWS
via social, messaging or email

22%
COMMENT ON NEWS
via social or website

GERMANY

More Germans have been adopting the internet for news, even if television remains the most widely used source of news. Historic laws to stamp out so-called 'fake news' and hate speech on social media are widely viewed as a success by German politicians.

The German Network Enforcement Act, known as NetzDG, controversially demanded that social platforms like Facebook and YouTube remove hateful and illegal content within 24 hours or face huge fines. Despite fears that 'overblocking' could limit freedom of speech, at a political level the law that was introduced at the start of 2018 is widely seen as a success.⁴⁶ Faster take down of illegal content has led many other countries to consider similar measures.

Two reports published by Facebook show that social media users are getting better at identifying offensive and illegal material. In the second half year of 2018, 1,048 violating pieces were reported, of which 369 were removed. This represents a significant increase in the proportion of posts removed, compared with the first half of the year. In the run-up to European Elections, Facebook has partnered with the investigative non-profit newsroom, Correctiv, as a fact-checking partner but also with the German Press Agency (dpa).

Despite these initiatives, low trust in the news found in social media has fallen to 16%, a decrease of 2 percentage points compared to 2018. Overall trust in the news has also decreased slightly to 47%, possibly influenced by revelations that a top reporter for *Der Spiegel* magazine had falsified news stories for many years. Claas Relotius, a journalist with numerous awards, made up stories and fabricated quotes for a range of media outlets that also included *Die Zeit*, *Frankfurter Allgemeine Sonntagszeitung*, *Die Welt*, and *SZ Magazin*. For *Der Spiegel*, in particular, this process may have lasting consequences on the proposed merger of



STATISTICS

Population	82m
Internet penetration	96%

the print and online teams, since one of the supporters of Relotius, Ulrich Fichtner, will not now take up the role of editor-in-chief, as was originally planned.

Meanwhile the economic outlook for news organisations in Germany remains difficult, particularly those from a print background. Falling circulation and declining print advertising have not been replaced by digital revenue as only a small minority (8%) of Germans are currently paying for any online news.

Partly as a result, growing concentration can be observed (Röper 2018) with newspapers merging (Verlagsgruppe Rhein-Main) and newsrooms combining (Madsack Media Group and DuMont). A number of publishers have announced significant job cuts, and some are considering pulling out of print altogether (Funke Mediengruppe). Others are putting parts of their print portfolio up for sale (DuMont). The digital-born sector is also in trouble, with HuffPost Germany, operated by the Burda media group, closing down at the end of March.

In sharp contrast, Axel Springer SE reported the most successful year in the company's history in 2018, with its digital business accounting for 84% of its operating profit of €737m. The bulk of the company's profits now come from advertising (classifieds) after it sold off most of its print titles. Axel Springer still operates *Bild* and *Die Welt* along with the digital-born *Business Insider* and the news aggregator *Upday*. *Bild* remains Germany's largest selling newspaper and has more than 400,000 digital subscribers. It has

recently experimented with a new printed political magazine *BILD Politics* in northern Germany, built on stories around the themes of anger, curiosity, and joy.

Greatest trust within the news media in Germany is still attributed to the two main public service news brands (ARD and ZDF). While populist attacks on the so-called 'lying press' seem to be ebbing off somewhat (Ziegele et al. 2018), a new discussion has flared up about content and funding for public service broadcasting in Germany.

A number of federal states are looking at providing an indexed level of contribution fee to public broadcasters (PSBs), rather than setting the level every four years. While this would involve some cost cutting, PSBs would get more planning certainty and better control over their own budget.

Public broadcasters have also come to an out-of-court agreement with newspaper publishers over the extent of their internet activities. PSBs will scale back internet text output that competes with newspapers and magazines. In return they have been given the go-ahead to keep television programmes online for an extended period of time and even to launch them before transmission (online first).

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Leibniz Institute for Media Research
I Hans Bredow Institute, Hamburg

⁴⁶ www.handelsblatt.com/politik/deutschland/netzdg-koalitionspolitiker-sehen-gesetz-gegen-hass-als-erfolg-opposition-bekraeftigt-kritik/23815526.html

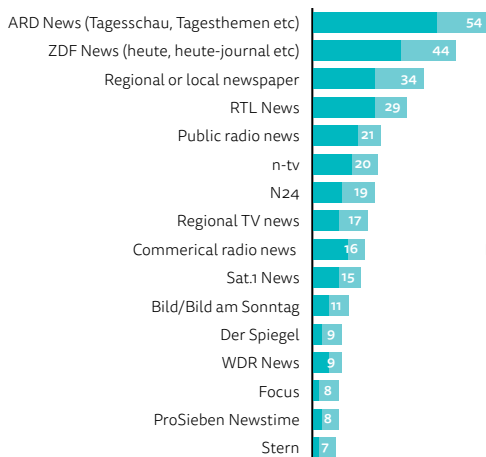
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

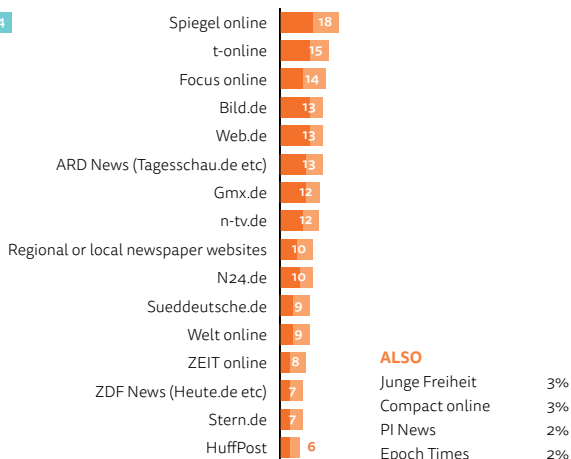
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- Weekly use online brands
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TV, RADIO AND PRINT



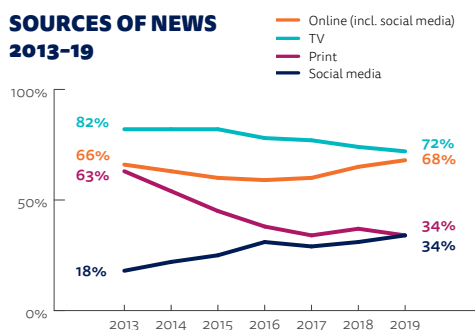
ONLINE



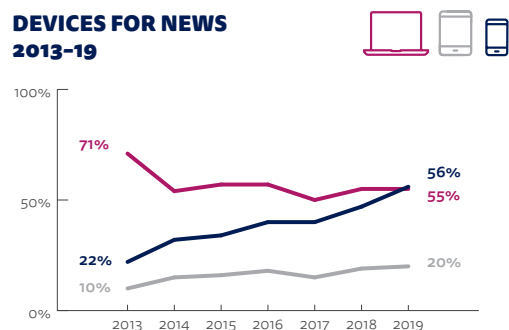
CHANGING MEDIA

Television is still the most widely used source of news in Germany but its reach has been steadily declining in recent years. The internet has gained in popularity, including the use of social media and messaging applications, though Facebook was used less for news than in 2018.

SOURCES OF NEWS 2013-19



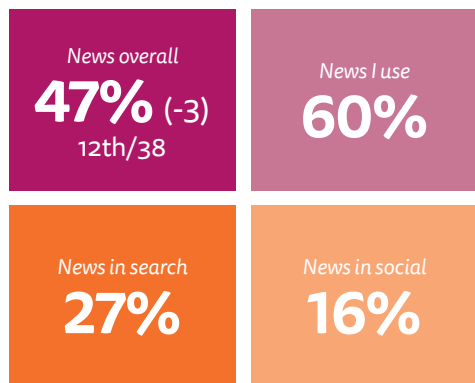
DEVICES FOR NEWS 2013-19



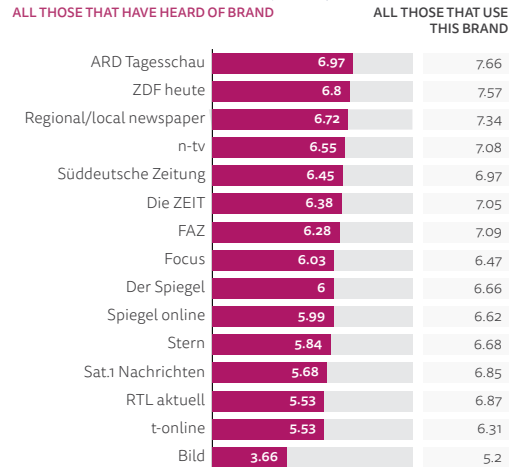
TRUST

A fraud scandal shattered the German press in the end of 2018 as it was revealed that a Spiegel reporter had manipulated reports in various media outlets. This year's brand figures show declining trust across a number of major titles from Der Spiegel to major public broadcasters to the tabloid newspaper/website Bild.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



8%
pay for
ONLINE NEWS

21%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	22% (-2)	50%
2	YouTube	19% (+4)	58%
3	WhatsApp	16% (+2)	66%
4	Instagram	6% (+3)	23%
5	Twitter	5% (-)	12%
6	Facebook Messenger	4% (-)	24%

22%
SHARE NEWS
via social, messaging or email

14%
COMMENT ON NEWS
via social or website

GREECE

The media market in Greece is characterised by online fragmentation, a changing and polarised TV market, a print sector in crisis and one of the highest uses of social media for news. Trust in the news remains one of the lowest in our survey.

The past year saw a number of structural changes in the broadcasting landscape. MEGA finally ceased operations, 29 years after its first broadcast and a few years after getting into financial difficulty. Open TV, owned by a Greek-Russian businessman, Ivan Savvidis, with links to Vladimir Putin, launched this year. It took over from Epsilon TV which is now reduced to being a regional broadcaster in the capital. The Vardinogiannis family, owner of Star TV, is about to close a deal for 50% of Alpha's TV and radio stations, pending approval from the broadcasting regulator, potentially opening the way to greater collaboration between the two. One TV, a new online broadcaster, is awaiting approval for obtaining the sixth national TV license. It is owned by Evangelos Marinakis who has during the past years bought a number of legacy news outlets.

The polarised political climate in Greece was reflected in the news media landscape this year. The main opposition party, New Democracy, banned its MPs from being interviewed by the public service broadcaster for five months, citing unfair coverage and pro-government bias. Meanwhile the governing party, Syriza, has boycotted the largest news broadcaster SKAI since summer 2018, following their dissatisfaction with SKAI's wildfire coverage in Attica. In December, SKAI suffered a bombing attack at its headquarters from a left-wing terrorist organisation.

The print market in Greece continues its dramatic decline. The Sunday newspapers currently in circulation sell a small fraction of the 1.1 million papers sold ten years ago.⁴⁷ Print editions of most newspapers face tough competition in an environment where most content can be found for free online. Despite this, there are still more



STATISTICS

Population	11m
Internet penetration	70%

than 20 national newspapers in Greece, including six sports papers. As a point of reference, the UK, a country six times larger than Greece, has half the number of national newspapers. The abundance of news sources in Greece can be explained by attempts of some businesspeople to influence the political agenda or to gain revenue from state advertising. The government announced in May that it will support local and regional newspapers with €16m during the next four years. The money will be distributed to news organisations based on the number of full-time employees they have, while a similar support package for national newspapers will follow.

The online media market in Greece is highly fragmented, with new digital-born players making up half the list of most popular websites. Newsbomb.gr maintained the top spot for a number of years with its sensationalist news coverage (34% weekly access). A few legacy players like SKAI (25%) and Proto Thema (18%) have built up a loyal audience online while some new outlets have strong connections to legacy journalism, being the personal initiatives of famous journalists or news anchors (e.g. Enikos or NewsIt). One interesting new digital-born initiative is the 'slow news' Inside Story, which operates behind a paywall, following the example of De Correspondent in the Netherlands.

Greeks report using on average more than 5 online news sources per week, the second highest among 38 countries. While this finding reflects plurality in news selection, in the long-tail list of the most visited websites are a number of news websites or

blogs that regularly engage in dangerous conspiracy theories. The number of news brands used can be explained by the very high use of social media platforms for news in Greece, a behaviour that has been linked to incidental exposure to news sources (Fletcher and Nielsen 2018). More than two-thirds (67%) of Greeks use social media as a source of news, while 20% of Greeks online (and 32% of those under 35) claim that social media are their main source of news. Apart from Facebook (58%) and YouTube (36%), Greeks use messaging applications widely to share and discuss news. A quarter of the sample (25%) uses Messenger for news, while Viber is used for news by 17% of Greeks, the highest share in all 38 countries of the study.

Antonis Kalogeropoulos

Reuters Institute for the Study of Journalism

⁴⁷ Data from Argos (www.argoscom.gr) and the Athens Daily Newspaper Publishers Association (eihea.gr). It should be noted that a handful of large newspapers have asked to be excluded from the industry circulation data published from the Argos press distribution agency.

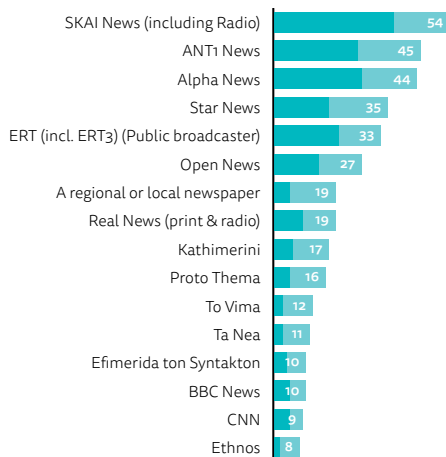
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

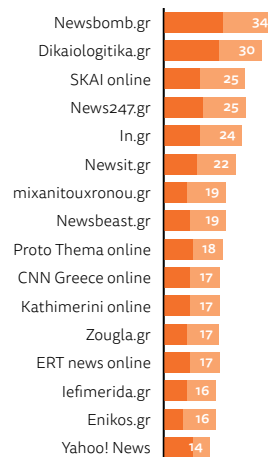
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



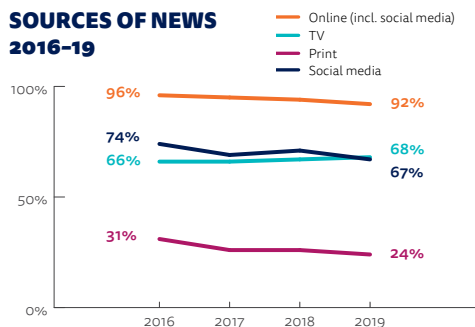
ONLINE



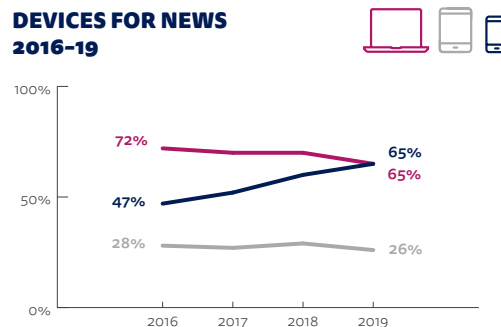
CHANGING MEDIA

Smartphones are now used to access news as often as computers for the first time. Almost all Greeks online get news via online sources (92%), with social media (67%) considerably more popular for news than in many other countries. TV news usage remains steady while newspaper readership continues to decline.

SOURCES OF NEWS 2016-19



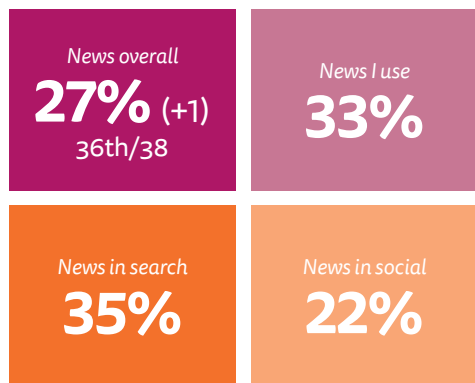
DEVICES FOR NEWS 2016-19



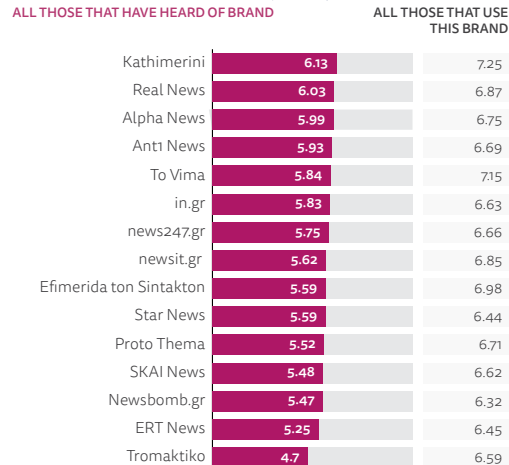
TRUST

Only a third trust the news they use themselves, while Greece ranks 36th across 38 countries in overall trust in news. Decades of corruption, political and business undue influences, and their targeting by left- and right-wing populist parties have resulted in the media being widely distrusted by Greeks.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



7%
pay for
ONLINE NEWS

36%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	58% (-2)	80%
2	YouTube	36% (-)	81%
3	Facebook Messenger	25% (+3)	63%
4	Viber	17% (+3)	54%
5	Instagram	15% (+5)	42%
6	Twitter	12% (-1)	24%

46%
SHARE NEWS
via social, messaging or email

31%
COMMENT ON NEWS
via social or website

HUNGARY

Government allies strengthened their grip on the media market last year through acquisitions and mergers, distribution of state advertising and subsidies, control over public service media, and smear campaigns against critical journalists. Against this background it is not surprising that the audience's trust in news is very low. Social media networks are a key source of news.

In April 2018, the Prime Minister Orbán led right-wing parties (Fidesz-MPP and KDNP) to a third consecutive term in government, with a two-thirds majority in Parliament. Since the election, governmental attacks against democratic institutions have continued, including the judiciary, academic institutions, NGOs, oppositional parties, media outlets, and the European Union itself. Government campaigns against 'migrants' and the European Union are running on various channels (billboards, television, and social media) paid for by the public purse. Reflecting concerns about democratic backsliding, Freedom House changed Hungary's status from free to partly free in their annual report. According to Transparency International, Hungary is the third most corrupt country in the EU⁴⁸ with Prime Minister Orbán's close friend, Lőrinc Mészáros, becoming the richest Hungarian in the course of a few years.⁴⁹

Investigations into the wrongdoings of oligarchs and politicians are conducted by independent journalism outlets, but are rarely followed up by police investigations or covered by pro-government media including the public service broadcaster. Because of the structure and nature of the Hungarian media environment, significant segments of the audience are systematically underserved with critical information, while the reach and breadth of pro-government outlets is extensive.

In captured media environments such as Hungary, political power tends to be



STATISTICS

Population	9.7m
Internet penetration	89%

reflected in the structure of the media market. The aftermath of the elections saw the capitulation of former-Orbánally-turned-nemesis oligarch Lajos Simicska. He either closed or sold all his assets, including his media companies. This resulted in news channel HirTV being taken over by government-friendly owners and editors, and in the closure of the historic daily *Magyar Nemzet*⁵⁰, the weekly *Heti Valasz*, and Lanchid Radio. As a consequence of Simicska's withdrawal from the media market, Hungary's biggest online news portal, Index, also changed its ownership structure, raising further concerns about its independence and sustainability. Zoom.hu, a recent addition to the online news market, has ceased operation due to financial problems.

But the most significant change on the Hungarian media market was the creation of a new Central European Press and Media Foundation (CEPMF), merging a total of 476 media companies – with donations from many of the owners of the biggest pro-government groups. The affected titles include the second-most-read tabloid paper, one of the most visited online news portals, numerous radio stations and television channels, and all the regional dailies.⁵¹ Though the CEPMF raises questions of fair competition and people's right to information and pluralism, the authorities have not investigated this since the government declared the move to be of 'national strategic importance'.⁵²

Besides ownership, governmental control over the market is exercised through the

distribution of state funding: while pro-government media receive much of their budget from state advertising, critical media are struggling for survival.⁵³ Some independent outlets are experimenting with new business models: crowdfunding (memberships and donations) has been a significant part of the budget of investigative journalism centres Atlatzso and Direkt36, and the weekly and online outlet, HVG, for some time. Other media outlets have been following this path, running crowdfunding and membership campaigns (Magyar Hang, 444), including the biggest online portal, Index.

Hungary has one of the lowest levels of trust in our entire survey (28%). On the one hand, there are ongoing discussions and research into the presence of misinformation (including Russian propaganda) in the Hungarian media market. On the other hand, it is common practice for politicians and pro-government media to label critical journalists and outlets as 'fake-news'. RTL Klub is the most trusted of the brands in our survey, with pro-government TV2 least trusted.

Paywalls are yet to be introduced to the Hungarian online market. Other innovations include content production in various formats (visualisations, videos, etc.), of which podcasts are a success – 32% of respondents have used podcasts in the past month according to our survey.

Eva Bogнар

Center for Media, Data and Society,
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⁴⁸ transparency.hu/en/news/hungary-bringing-up-the-rear-of-the-region-in-transparency-international-s-most-recent-world-corruption-ranking

⁴⁹ forbes.hu/a-magazin/magyarorszag-50-leggazdagabb-embere-mar-nem-csanyi-az-elo

⁵⁰ Later in 2019, the pro-government daily, *Magyar Idok* took on the 'Magyar Nemzet' name and brand.

⁵¹ english.atlatzso.hu/2018/11/30/data-visualization-this-is-how-the-pro-government-media-empire-owning-476-outlets-was-formed

⁵² mertek.atlatzso.hu/a-sajtoszabadsag-lapzartaja

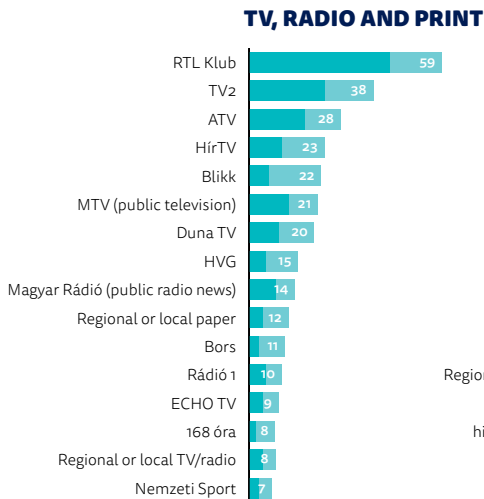
⁵³ mertek.atlatzso.hu/state-advertising-2006-2017

WEEKLY REACH OFFLINE AND ONLINE

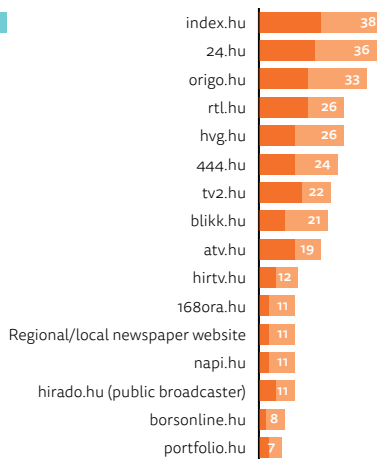
TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



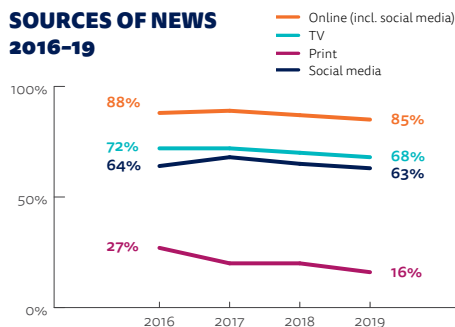
ONLINE



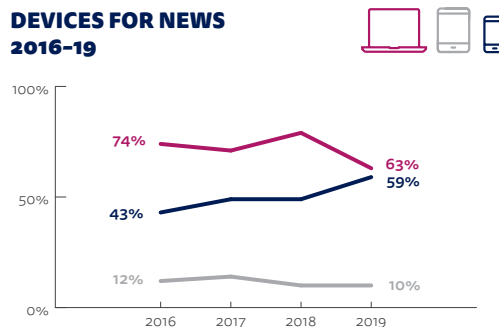
CHANGING MEDIA

Though online channels are the most significant news source, television still scores very high considering the composition of our sample (online news consumers). Social media as news source, especially Facebook, are high in international comparison.

SOURCES OF NEWS 2016-19



DEVICES FOR NEWS 2016-19

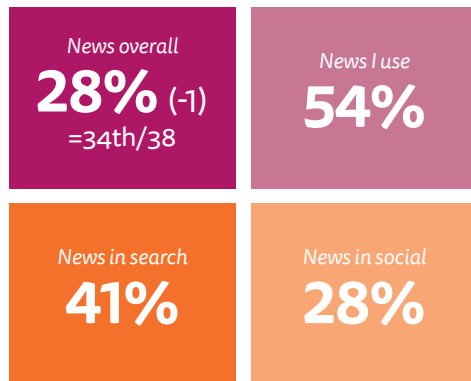


NB: 2018 figures for computer use were likely overstated due to an error in polling

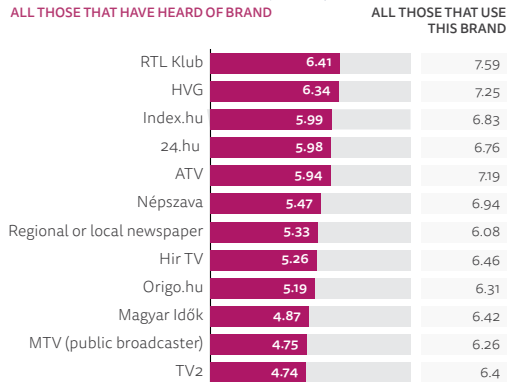
TRUST

Trust in the news remains extremely low in general (28%), though is much higher for sources that people use themselves (54%). This suggests a highly polarised media environment where consumers are drawn to brands that reflect their political views. This can also be seen by the difference in brand trust between those who are aware of a brand and users of that brand.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



7%
pay for
ONLINE NEWS

32%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	62% (+2)	85%
2	YouTube	29% (-)	77%
3	Facebook Messenger	16% (+5)	64%
4	Instagram	7% (+3)	26%
5	Twitter	4% (-1)	11%
6	Viber	4% (+1)	29%

37%

SHARE NEWS

via social, messaging or email

23%

COMMENT ON NEWS

via social or website

IRELAND

Brexit has dominated news coverage in Ireland, the EU country most likely to be affected by the terms of the UK's withdrawal. At the same time the government continues to examine the role of platforms in disseminating misinformation and over political advertising – something which came into focus during a hotly contested vote on abortion laws.

Ireland went to the polls twice in 2018, first with a referendum on abortion in May and then a presidential election. The referendum was preceded by a 'citizen assembly' which debated the issue and ensured factual information was available for voters. Nonetheless, issues arose particularly concerning political advertising on Facebook. A voluntary group, the Transparent Referendum Initiative, used open-source software supplied by Who Targets Me to analyse messages which were being promoted to voters. It discovered that some adverts from outside Ireland were appearing in people's news feeds. Partly as a result of this, both Facebook and Google – whose European HQs are based in Dublin – announced moves to put a halt to political advertising during the course of the campaign. The election of Ireland's president was more contentious than usual – the role is largely ceremonial – as a result of populist coverage of remarks about an ethnic minority made by one of the candidates.

Between Brexit and the two polls, it is unsurprising to see 76% of Irish people expressing an interest in political news. More broadly, the digital news environment saw a slight shift with the development of some online partisan alternative media initiatives, mirroring developments in other countries, raising critical questions about mainstream news providers. Media Literacy Ireland's 'Be Media Smart' campaign, supported by the Broadcasting Authority of Ireland (BAI), has been providing educational resources on how to evaluate news sources.

STATISTICS

Population	4.8m
Internet penetration	93%



There have been shifts in media regulation, which could ease the pressure on the press. Some titles were engaged in defamation cases, often settled out of court. One of Ireland's largest media owners, Denis O'Brien, tried to sue the *Sunday Business Post* for defamation but was unsuccessful. Recently, the High Court reduced what had been the most substantial payout under the Defamation Act from €10m to €250,000, strengthening the case for reform.

NewsBrands Ireland launched a campaign '#journalismmatters' – a five-point plan to support independent journalism which called for the reform of defamation, the introduction of a media minister in the government, and provision of more training. It also successfully lobbied the government to reduce VAT on printed newspapers which took effect in January 2019.

Journal Media created a new investigative platform, Noteworthy, supported by the Google Digital News Initiative fund, allowing the public to suggest topics for journalistic investigation which are assessed and opened up for crowdfunding.

Media plurality in Ireland reduced somewhat over the past year with the acquisition of the Landmark Media group by the *Irish Times*. The deal ended the ownership of the *Irish Examiner* by the Crosbie family whose custodianship began in 1872. Nonetheless, the latest BAI Report on media ownership and control concluded that there has not been a significant change in plurality due to changes in control in the 2015–17 period.

The public service broadcaster RTÉ continues to struggle to make sustainable revenues, raising concerns over the future

of its channels and signalling a need for further reform. The government allocated an additional €8.6m of funding. The BAI also recommended an increase in PSB funding of €30m for RTÉ and €8m for TG4. RTÉ faces challenges in appealing to younger audiences and relaunched its streaming app to help this.

TV3 became Virgin Media in August 2018, a deal which had been agreed the previous year. Virgin Media Ireland, which also owns mobile and broadband services alongside its subscription and free TV channels, says profits rose by 7% in 2018.⁵⁴

There were several redundancies in newspapers. The DMG Group which owns the *Irish Daily Mail* and *Mail on Sunday* announced it was seeking 35 voluntary redundancies⁵⁵, which comprised about 20% of its Irish total. News Corp UK & Ireland is shutting the local print edition of *The Times* and making most staff redundant.

Independent News & Media is set to change hands after its Irish billionaire shareholders accepted an offer from Belgium's Mediahuis to buy the business for €145.6m. Denis O'Brien – who is one of Ireland's richest men – was the biggest single shareholder in INM, which publishes the *Irish Independent* and *Sunday Independent* as well as a popular online version. The titles had already announced they were seeking 30 redundancies after a 15.4% fall in pre-tax profits in 2018. INM had signalled plans to introduce a subscription model in 2020.⁵⁶

Jane Suiter
Dublin City University

⁵⁴ www.irishtimes.com/business/media-and-marketing/revenues-at-virgin-media-ireland-rose-7-in-2018-1.3809619

⁵⁵ www.irishtimes.com/business/media-and-marketing/daily-mail-to-cut-more-than-20-of-its-irish-staff-1.3811222

⁵⁶ www.irishtimes.com/business/media-and-marketing/independent-news-media-eyes-digital-subscriptions-as-profits-fall-15-4-1.3842795

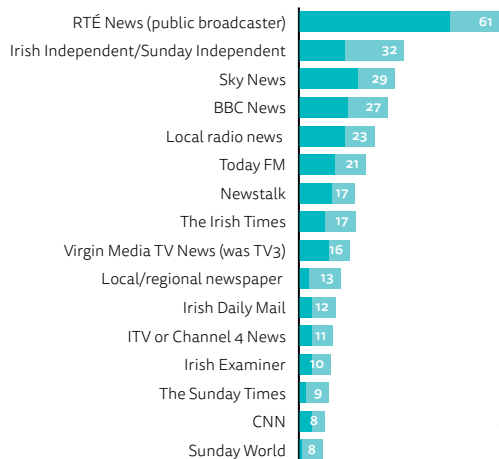
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

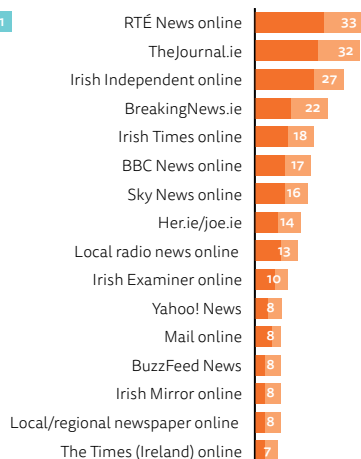
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



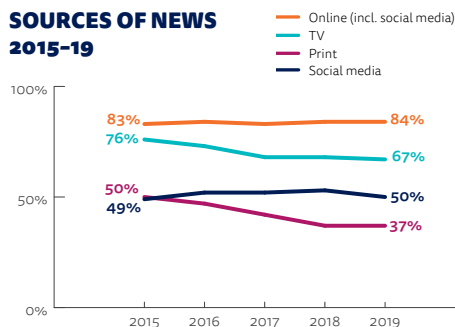
ONLINE



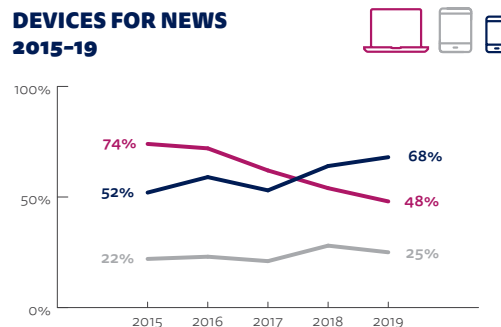
CHANGING MEDIA

The prevalence of digital news use has not fluctuated much over five years, holding at an average of 84%. However, the use of TV news has continued to decline by almost 10 percentage points over four years to 67%. In line with international trends, the use of smartphones continued to increase over the past five years, rising to 68% from 52%, while the use of computers and laptops continued to fall.

SOURCES OF NEWS 2015-19



DEVICES FOR NEWS 2015-19



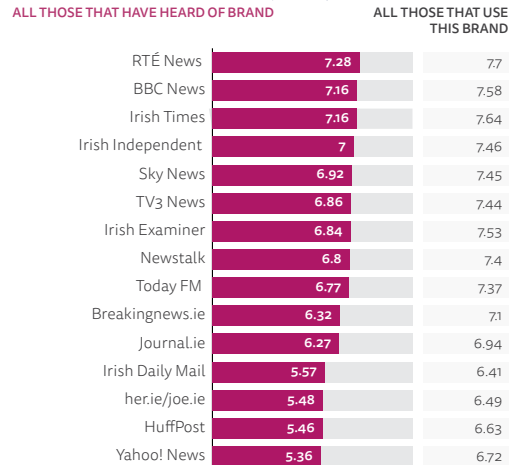
TRUST

Trust levels are relatively high by international standards with the highest trust among RTÉ consumers. However, continued discussion about the quality of news media and regulation of online political advertising has been an ongoing debate in Ireland which may have contributed to an overall decline of trust in news to just 48%.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



12%
pay for
ONLINE NEWS

37%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	37% (-1)	64%
2	YouTube	17% (-1)	60%
3	WhatsApp	15% (+2)	58%
4	Twitter	12% (+1)	23%
5	Facebook Messenger	9% (-)	44%
6	Instagram	7% (+2)	31%

36%
SHARE NEWS
via social, messaging or email

21%
COMMENT ON NEWS
via social or website

ITALY

After last year's general election, minor changes in the Italian media environment took place to reflect the new balance of power within Italian politics. This year has also been marked by a continuing weakening of the printed newspaper sector.

Topics related to immigration, government formation, and the relationship between the ruling coalition parties have dominated news coverage this year. After months of negotiation, the anti-establishment Five Star Movement and the far-right League party formed a government in June 2018. Immigration has long been a core topic for the League's leader Matteo Salvini, and his tough approach towards landings of immigrants from North Africa, together with his tendency to comment on crimes where immigrants are involved, have kept the topic in the media spotlight and at the centre of the public debate.

Social media posts, especially Facebook live streams, have been intensively used by the leaders of both the Five Star Movement and the League to circulate anti-elite and anti-migrant messages, as well as to share moments of their personal and family life. With more than 3.5m followers, Matteo Salvini has the greatest reach on Facebook of any European politician.⁵⁷ Social media has also been often used to attack Italian journalists. In early 2019, a Council of Europe report warned against the hostile rhetoric from members of the Italian government.⁵⁸

In line with the Italian tradition of media partisanship, editorial and managerial changes in the broadcasting sector have followed the election results. At Mediaset, the main commercial TV group owned by Silvio Berlusconi, only minor changes took place. Some TV shows hosted by journalists known for their anti-migrant and anti-establishment positions were cancelled or suspended. Many observers have seen this as an attempt to cut the media support for Salvini's League, which at the 2018 general election outpolled



Forza Italia (the party led by Berlusconi). Some of these TV shows have now been restored after audience pressure. At the public service broadcaster RAI, the reorganisation has been widespread: as regularly happens after a new election, top managers and the TV newscasts editors have been substituted to reflect the changes in the political majority.⁵⁹

While broadcasters' revenues have been relatively stable from 2013 to 2017, newspapers' and magazines' revenues experienced a 21% reduction during the same period. In terms of overall revenue share within the Italian communication system, the main players are the international broadcaster Comcast Corporation/Sky (15%), Berlusconi's broadcasting group Fininvest/Mediaset (15%), and the public service broadcaster RAI (14%). Other relevant players are the international platforms Google (4%) and Facebook (3%), Cairo Communication (the publisher of the TV channel La7, which also controls *Il Corriere della Sera*, 4%), and GEDI (the publisher of *La Repubblica*, *La Stampa*, and several other local newspapers and radio stations, 3%).⁶⁰

The online news market is still dominated by legacy players. The websites with the widest online reach are those of established commercial TV broadcasters (the Mediaset's TgCom24 and SkyTg24), the main newspapers (*La Repubblica*, *Il Corriere della Sera*, and *Il Fatto Quotidiano*), and the main Italian news agency (ANSA). However, 2018 has also been marked by the impressive results of the digital-born outlet Fanpage. Thanks to its effective use

STATISTICS

Population	59m
Internet penetration	92%

of social media, its focus on online videos, and the establishment of large teams of multimedia experts and social media managers, Fanpage is now among the top five online news players in our survey list. At the end of December 2018, Enrico Mentana, the editor of La7 television newscast, launched Open, a digital-born news outlet that has been widely publicised from the Facebook page of its founder. However, it is too early to evaluate the success of Open in terms of audience results or its digital advertising revenues.

Because of internal disagreements, RAI has not yet launched the online news outlet that has been at the centre of many discussions in recent years. The online news reach of the Italian public service broadcaster is still far from the levels it achieves on traditional platforms. Although several leading newspapers like *Il Corriere della Sera* and *La Repubblica* have adopted 'soft' paywalls in the last few years, our data show the proportion of people paying for any online news is only 9% in Italy, with the figures for ongoing digital subscriptions even lower.

Alessio Cornia

Dublin City University

Note: Some brand positions have moved significantly this year as a result of new education quotas and changes to our panel providers as we try to increase accuracy. We have not commented on brand shifts, therefore, without corroborating evidence.

⁵⁷ www.repubblica.it/politica/2018/06/14/news/matteo_salvini_e_il_politico_europeo_piu_popolare_su_facebook-199008668

⁵⁸ cpj.org/blog/COE_JournalistsReport_2019.pdf

⁵⁹ agensir.it/quotidiano/2019/4/1/osservatorio-tg-eurispes-numerosi-i-cambi-di-direzione-nellinformazione-televisiva/

⁶⁰ www.agcom.it/osservatorio-sulle-comunicazioni

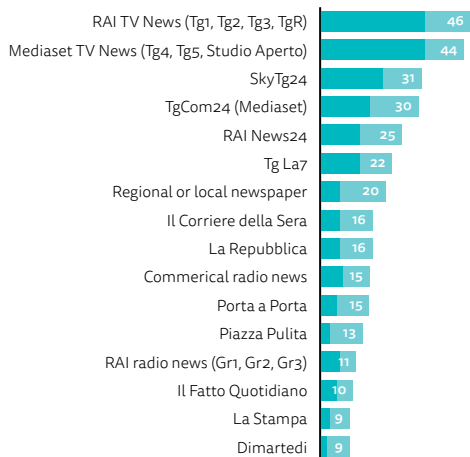
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

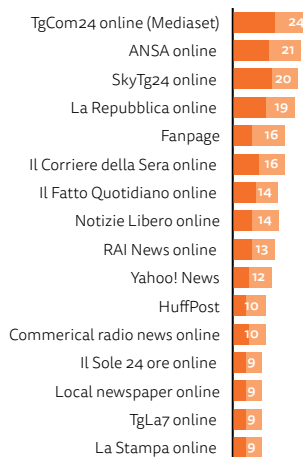
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



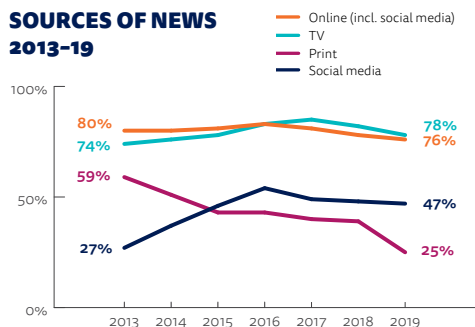
ONLINE



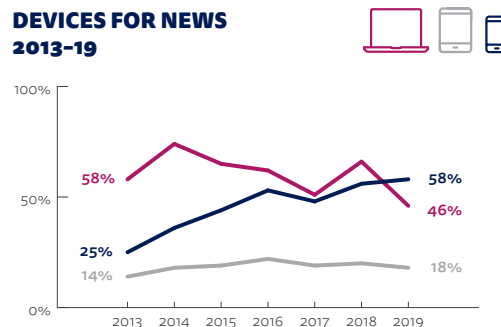
CHANGING MEDIA

Newspaper readership continues to fall steadily while television news viewership has been more stable than in many other countries. With over half of our sample (58%) using it for news each week, smartphone is now the main device used to get online news.

SOURCES OF NEWS 2013-19



DEVICES FOR NEWS 2013-19



NB: 2018 figures for computer use were likely overstated due to an error in polling

TRUST

Trust in news is particularly low. This long-standing trend is mainly due to the partisan nature of Italian journalism and to the strong influence of political and business interests on news organisations. Brands that are most trusted are generally those that are known for lower levels of political partisanship.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



9%
pay for
ONLINE NEWS

30%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	54% (+3)	77%
2	WhatsApp	27% (+2)	78%
3	YouTube	25% (-)	69%
4	Instagram	13% (+6)	41%
5	Facebook Messenger	8% (-)	40%
6	Twitter	8% (-2)	19%

41%
SHARE NEWS
via social, messaging or email

27%
COMMENT ON NEWS
via social or website

NETHERLANDS

STATISTICS

Population	17m
Internet penetration	96%

Faced with fears about disinformation, the Netherlands government has been encouraging its citizens to read critically. While trust levels remain relatively high, the government reserved €20m to support investigative journalism.

Although overall trust numbers are slightly lower in 2019, the Netherlands still has relatively high levels of trust in news from mainstream news organisations. Trust for most top brands has even slightly increased. This may be the most remarkable finding in this year's survey. NOS News is still by far the most used source and also the most trusted brand.

There is increasing concern about people's ability to differentiate between professional news sources and political information/disinformation. In December 2018, a state commission advised the cabinet to regulate digital political campaigns, for instance by forcing platforms to indicate clearly when advertisements were financed by political parties. The Minister of the Interior wants to try self-regulation before introducing legislation.

In March 2019, the Dutch government launched a campaign, 'Stay Curious. Stay Critical', to raise awareness of disinformation and to teach people how social media, algorithms, and filter bubbles function. For instance, research shows that videos from right-wing parties PVV and Forum voor Democratie are recommended on YouTube three times as often as videos from all other Dutch political parties combined.⁶¹ What's more, collaborative research by *De Volkskrant* and *De Correspondent* suggests that YouTube paves the way for radicalisation, through recommendations which become more extreme as users watch more videos. Their data also show a much stronger presence of the extreme right compared to the marginal presence of the extreme left.⁶² The government campaign ran from March until the summer to include the Dutch provincial elections in March and the European



Parliamentary elections in May.

Facebook and *Nieuwscheckers*, a fact-checking initiative at Leiden University, ended their collaboration over a dispute over legal liability: neither Facebook nor the university was prepared to bear liability for legal claims over the content, such as defamation or slander. NU.nl, the most popular online news platform, is the only Dutch organisation that still checks news items for Facebook as publisher Sanoma underwrites any litigation costs.⁶³ In line with this focus on facts, their discussion platform, NUJij, banned comments that deny climate change, explaining that, while they encourage critical discussions about climate change, denying it constitutes spreading falsehoods.

Successful membership-based online news site *De Correspondent* has spent much of the year focused on how to adapt its formula for the English-language market. Their crowdfunding campaign raised (US)\$2.5m within the first month, through 45,888 members from more than 130 countries. The campaign was backed by dozens of high-profile ambassadors, including Jay Rosen, Nate Silver, Judd Apatow, Rosanne Cash, and DeRay Mckesson. The *Correspondent* will start publishing content in September, but announced in March that their HQ would be remaining in Amsterdam, raising some eyebrows among (US) supporters who had been under the impression there would be a US office.

In line with rising podcast figures (up 3 percentage points), news organisations are investing in audio. Newspaper NRC will

launch a daily podcast focusing on one main story, similar to *NYT's The Daily*. *De Correspondent* launched a podcast version of a selection of their articles. Commercial broadcaster RTL News launched a WhatsApp 7am wake-up service in the form of a two-minute audio summary of the day's main news. Digital news kiosk *Blendle* continues to be loss-making, but it says *Blendle Audio* – audio versions of articles – is successful and will receive further investment.⁶⁴

NOS News launched *NOS Stories* on YouTube, Instagram, and Snapchat, bringing news stories targeted at 13-to-18-year-olds.

Dutch public broadcaster NPO received an additional €40m from the government to compensate for lower-than-expected advertising revenues. Though stressing that the Dutch media landscape requires solid public broadcasting, the cabinet says a 'fundamental reflection' about NPO's future is necessary. A long-term vision is due to be developed.

The government reserved €20m to be spent over four years to support investigative journalism. Emphasising the increasing financial constraints of regional and local journalism and importance of their watchdog role, 75% of the new budget is earmarked for regional and local projects. So far, €2.7m has been divided between 23 projects.

Irene Costera Meijer and Tim Groot Kormelink
Vrije Universiteit Amsterdam

⁶¹ www.denieuwereporter.nl/2018/11/micro-targeting-bots-en-algoritmes-ondermijnen-democratieen-wereldwijd

⁶² www.volkskrant.nl/kijkverder/v/2019/hoer-youtube-rechte-radicalisering-in-de-hand-werkt-and-www.decorrespondent.nl/9149/aanbevelen-voor-jou-op-youtube-racisme-vrouwenhaat-en-antisemitisme/445528853-of710148

⁶³ www.nrc.nl/nieuws/2019/02/26/factchecken-facebook-loopt-stuk-op-aansprakelijkheid-a3655348

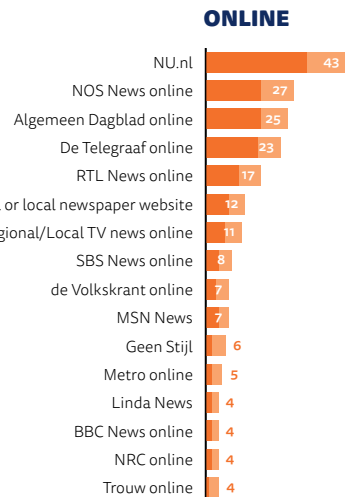
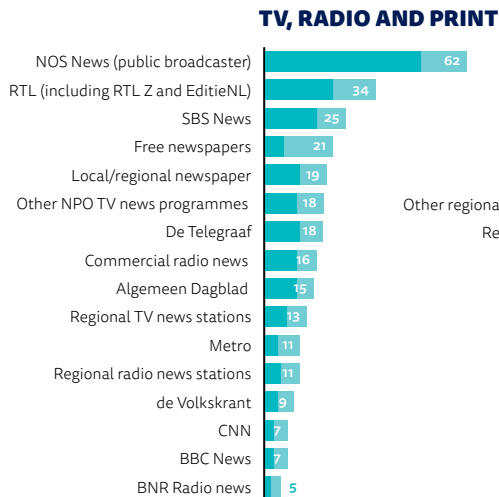
⁶⁴ www.quotenet.nl/Nieuws/Blendle-eindigt-dieper-in-de-rode-cijfers-in-2017-maar-is-positief-over-de-toekomst-219024

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

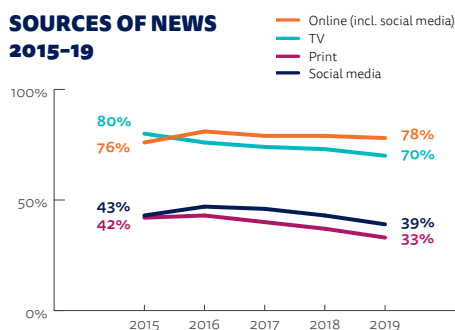
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

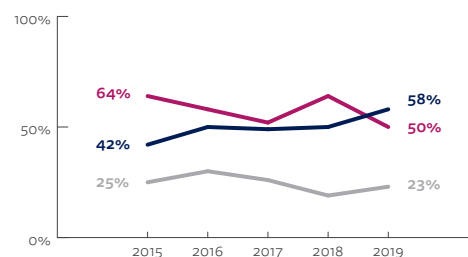


CHANGING MEDIA

Traditional forms of news such as TV and print have become less important in the last five years while online news has remained broadly flat. The smartphone is now the most popular device for digital news, switching places with the computer. The tablet is slightly on the rise again.



DEVICES FOR NEWS 2015-19

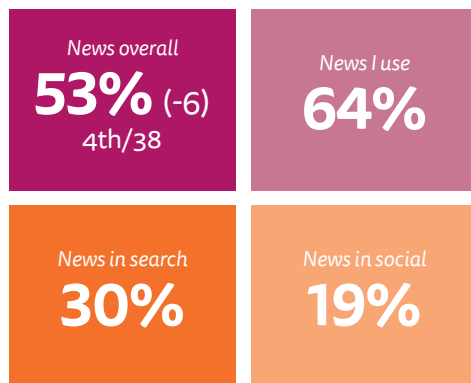


NB: 2018 figures for computer use were likely overstated due to an error in polling

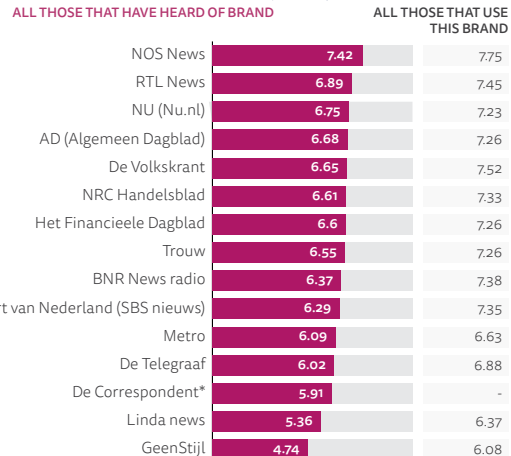
TRUST

While trust is still relatively high in the Netherlands (4th place), overall trust in news is slightly in decline. This might be caused by increasing discussions about disinformation and fake news on social media, rather than by declining quality of mainstream news.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



* No figure for users of De Correspondent (did not meet 50 minimum threshold)

11% pay for ONLINE NEWS

21% listen to PODCASTS in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	28% (-1)	61%
2	WhatsApp	18% (+1)	70%
3	YouTube	14% (-)	52%
4	Twitter	7% (-)	16%
5	Instagram	6% (+1)	27%
6	Facebook Messenger	4% (+1)	29%

22% SHARE NEWS via social, messaging or email

15% COMMENT ON NEWS via social or website

NORWAY

The Norwegian media landscape mixes strong national publishers and public service media with a reputation for innovation in content and business models. Norwegians show high willingness to pay for online news. Meanwhile, #MeToo resulted in political scandals as well as debates on media ethics and trust.

Norway remains the country with the highest number of consumers (34%) willing to pay for online news, up 4 percentage points since last year, with growth skewed towards those with high income. Norwegians have had a strong tradition for reading print newspapers and the transition to digital subscriptions has been facilitated through hybrid solutions that typically bundle paper and digital content. This, and the absence of freesheets, explains why Norway remains on top when it comes to paying for online news.

These trends are reflected in the balance sheets of traditional publishers. The foundation-owned local newspaper company Amedia, for instance, reported a €40m (EBITDA: 13.1%) operating profit in 2018, with a solid increase in local digital advertising revenue partly replacing falls in print. Schibsted, which owns the largest quality newspaper *Aftenposten* as well as the popular tabloid *VG*, and numerous regional newspapers and publishers abroad, reported record operating profits (EBITDA: 19%). In 2019, Schibsted will divide its businesses into two parts; a consumer media division focused on the Nordics region and an internationally focused online classifieds business. The split may give Schibsted more cash to invest in strategic acquisitions.

In March 2019, a much-anticipated white paper on media policy was published by the Conservative-led coalition government. The white paper restated the need for an arm's length distance between government and the media – an important principle, not to be taken for granted. It also proposed changing the funding model for public



service broadcaster NRK from licence fee to tax, and to redistribute some existing press subsidies to local news and innovation.

Almost a third of Norwegians (31%) have used podcasts during the last month, and several of the major newspapers have launched a range of podcasts, especially focused on news commentary. Public service radio broadcaster NRK has responded by adding podcasts to its already rich menu of programming, for example by relaunching older shows or developing niche podcasts for popular hosts. Podcasts especially reach younger age-groups, where over half (52%) of those under 35 years have used podcasts, compared to only 22% of those over the age of 35. The growth of podcasts has sparked a debate on regulation in comparison with other news media. Comedians' podcasts that cover politics, for example, are accused of repeatedly breaching ethical guidelines widely observed in Norwegian journalism.

Meanwhile the toxic nature of online comments has led a number of major news brands to pull back from offering these services. Digital-born tabloid *Nettavisen* followed suit in early 2019, despite earlier having launched an elaborate system to counter anonymous trolling and hate speech. Meanwhile, relations between Norwegian news providers and the global platforms remained strained. Non-profit fact-checker *Faktisk.no*, entered into a collaboration with Facebook, but this led to questions and a debate about its editorial independence, given that it now takes money directly from the platform.

STATISTICS

Population	5.4m
Internet penetration	99%

Politics and social media have become increasingly interlinked in Norway. As in many other countries, the #MeToo movement has sparked heated debates. The prime case has been the fall of Labour party Deputy Leader Trond Giske, following a number of sexual harassment allegations against him – with accompanying condemnation on social media. When Giske attempted a political comeback in early 2019, the tabloid *VG* reported a further incident in an Oslo bar, but was forced to apologise when it turned out that the woman involved had been misquoted.⁶⁵ All this triggered widespread discussion, and a major documentary on public television about sexual harassment, the ethics of reporting such cases, and the treatment of sources.

Like many other countries, Norway has seen the rise of 'partisan' news sites in the last few years. *Resett.no*, *document.no*, and *rights.no*, are among the most used, all with a tough stance on issues of immigration and Islam, and all causing public debates that extend beyond their relatively small audiences, thus influencing the wider news agenda. These sites are, however, much less trusted than mainstream media, with the public broadcaster NRK still topping the list in our survey. There is an ongoing debate about partisan media and whether they should be part of Norway's self-regulatory regime. In 2018, the Association of Norwegian Editors granted membership to the editor of *Document.no*, but denied an application from the editor of *Resett*, based on repeated violations of ethical guidelines.

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⁶⁵ www.newsenglish.no/2019/04/26/lack-of-humility-led-to-giskes-fall

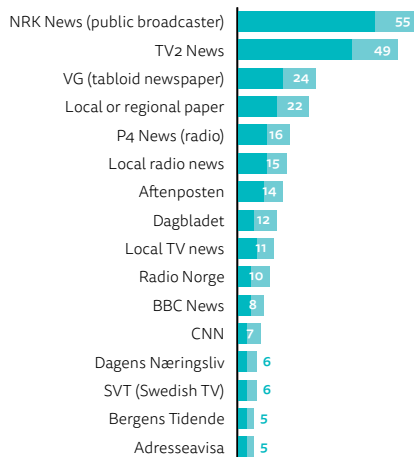
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

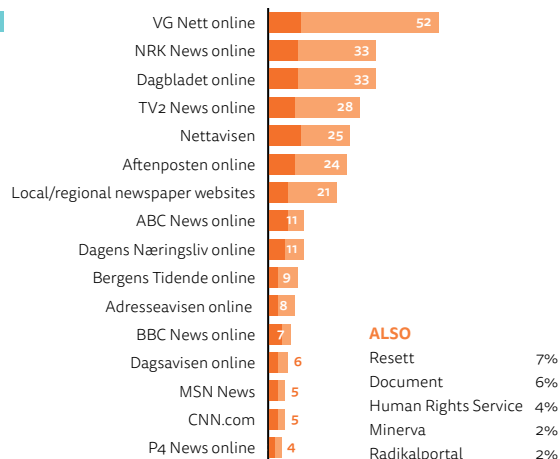
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



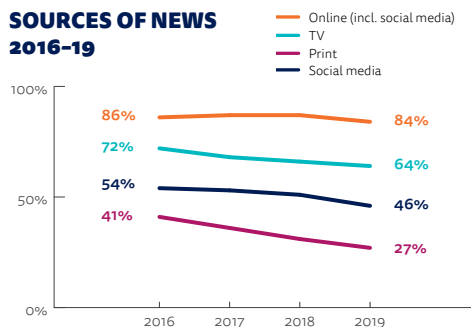
ONLINE



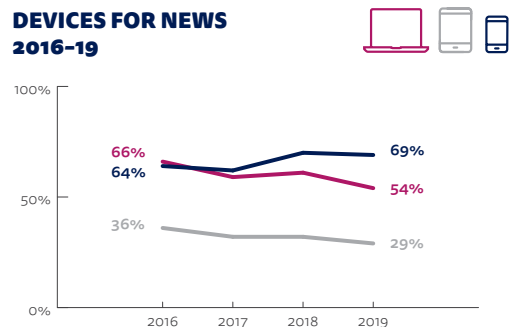
CHANGING MEDIA

The vast majority of Norwegians (84%) use online news weekly, one of the highest figures in our survey, while traditional news sources – print and television – are in decline. Online patterns are shifting from computers to smartphones, which are now by far the number one device for news in Norway.

SOURCES OF NEWS 2016-19



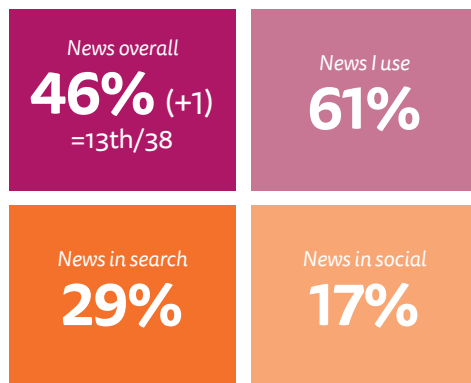
DEVICES FOR NEWS 2016-19



TRUST

Trust in news is fairly low (13th of 38 countries surveyed), despite little social and political polarisation in media use patterns, and financial support for media. Research has shown that trust in journalists' professionalism and biases depends on political preference, with far-right voters and those with strong views on immigration expressing most mistrust.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



34% pay for **ONLINE NEWS**

31% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News*	For All
1	Facebook	45% (+5)	75%
2	YouTube	14% (+2)	56%
3	Facebook Messenger	14% (+3)	57%
4	Snapchat	10% (+1)	47%
5	Instagram	10% (+4)	41%
6	Twitter	6% (-)	15%

25% **SHARE NEWS** via social, messaging or email

16% **COMMENT ON NEWS** via social or website

* Note: Due to a scripting error, the news figures come from a re-poll in March 2019. The base is slightly lower than for other questions. 1387 of the original 2000 sample responded to the re-contact request.

POLAND

Media in Poland has become deeply polarised in the last few years with the ruling Law and Justice party offering direct or indirect support to pro-government media while targeting critical journalists, sometimes with law enforcement agencies.

Poland's highly competitive broadcasting sector has had a remarkable year: for the first time in a decade TV advertising spending outpaced the rate of growth of internet advertising.⁶⁶ Substantial price hikes introduced by Polish broadcasters helped the bottom line. Public television (TVP) revenue, for example, grew by 14% on the back of stronger ratings – helped by major sports events, such as the World Cup and Olympic Games.

But ratings for news have not fared so well, with TVP's flagship bulletin, *Wiadomości*, falling from 17.4% to 15.1% share. There were smaller but significant declines also at TVN and Polsat. More widely, TVP remains dependent on financial support from government after further declines in licence fee revenue.⁶⁷ The subsidies, which have now reached €227.3m, have been paid since 2017, and together with ads leaves just 20% of TVP revenue coming directly from licence payers.

The government continues to support a number of other media companies through the substantial advertising spend of state enterprises and agencies. Tadeusz Kowalski, a media scholar at the University of Warsaw, has shown that the main beneficiaries are pro-government titles such as *Gazeta Polska*, *Sieci*, and *Do Rzeczy*. For them, state-related revenues accounted for 45%, 40%, and 23% of total ad revenues respectively.⁶⁸

Meanwhile, some independent journalists have been attracting government attention of a different kind. A reporter of the Polish edition of the *Newsweek* weekly was summoned for questioning after publishing a profile of the vice-president of Poland's Constitutional Court.⁶⁹ It was suggested by the prosecutors' office that the article had



constituted the unauthorised disclosure of personal data. In another case, the internal security agency entered the house of a TVN cameraman with accusations that he'd been promoting fascism. The agency referred to pictures taken while working undercover as part of a team that infiltrated Polish neo-Nazis and filmed Hitler's birth anniversary celebration.⁷⁰ The case against the TVN employee (owned by Discovery Communications) was dropped four months later.

Focused on fighting for survival, major independent newsrooms worked on improving their reporting and scoops. RMF FM, one of the most trusted brands according to our data, has built its reputation on breaking news. The Onet news team focused on in-depth reporting and investigations that translated into the Grand Press Digital award.

Gazeta Wyborcza published recordings of the Chairman of the Financial Supervision Authority soliciting a bribe from the owner of a bank.⁷¹ In January *Wyborcza* launched a series of stories based on recorded conversations between the Law and Justice leader, Jaroslaw Kaczynski and his associates. The politician was discussing a project to build a pair of skyscrapers in Warsaw on land owned by a company controlled by his associates.⁷²

Original content seems to help to sell subscriptions, and *Gazeta Wyborcza* remains a clear leader in this area with more than 170,000 digital subscribers at the end of 2018. Tok FM radio announced in March 2019 that it has 15,000 active subscribers and Onet is

STATISTICS

Population	38m
Internet penetration	78%

about to launch a new paid content section in 2019 to diversify its revenue.

French media group Lagardère withdrew from Central Europe. As a result, the company owned by billionaire investor Daniel Křetínský became the owner of the second largest commercial radio network, Radio Zet. In February 2019 the new owner sold it to the consortium created by Agora (the publisher of *Gazeta Wyborcza*) and Czech SFS Ventures, linked to billionaire George Soros.⁷³

For years podcasts were seen by the Polish media industry as hard to monetise and have been largely left to amateurs. But in the last year newsrooms started to see podcasting as an important way to drive loyalty for premium products. *Puls Biznesu* launched a regular podcast *Puls Biznesu do słuchania* (*Puls Biznesu to listen*) and claims to have 15,000 regular listeners. Tok FM radio produces six regular podcasts and Onet and *Newsweek* also jumped on the bandwagon last year.⁷⁴

Poles do not seem to be as concerned about their privacy as many of their European counterparts; hence time spent on Facebook and Facebook Messenger kept growing in Poland, while other European countries were using WhatsApp more often. Mobile operators offering data plans and pre-installing Facebook applications on smartphones drive Facebook usage in Poland.

Vadim Makarenko

Journalist at *Gazeta Wyborcza*, and former Reuters Institute Journalist Fellow

⁶⁶ Estimates from Wavemaker, the biggest media agency in Poland.

⁶⁷ www.politico.eu/article/tvp-pis-poland-media-battle-gets-political

⁶⁸ www.press.pl/tresc/56634,prawicowe-tytul-y-z-najwiekszymi-przychodami-z-reklam-od-panstwowych-spolek

⁶⁹ mappingmediafreedom.usshahidi.io/posts/22887

⁷⁰ www.tvn24.pl/tvn24-news-in-english,157,m/private-polish-broadcaster-tvn-says-is-facing-intimidation-from-state,886858.html

⁷¹ www.bloomberg.com/news/articles/2018-11-13/poland-premier-to-probe-bank-watchdog-over-getin-bribe-report

⁷² www.ft.com/content/bo8coe68-2550-11e9-b329-c7e6ceb5ffdf

⁷³ www.reuters.com/article/agora-radiozet-soros/polish-media-group-agora-buys-minority-share-in-radio-zet-idUSL5N2oF62M

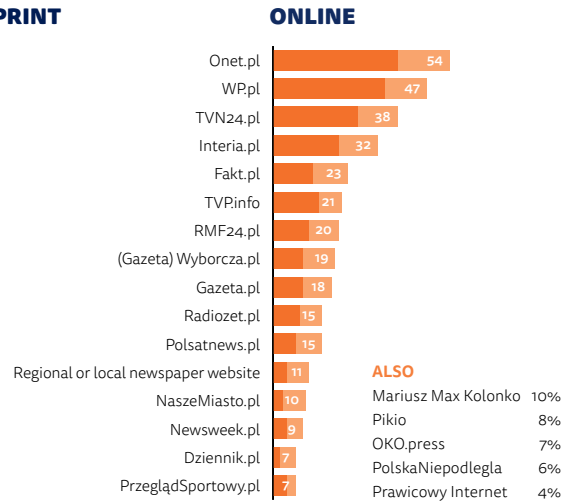
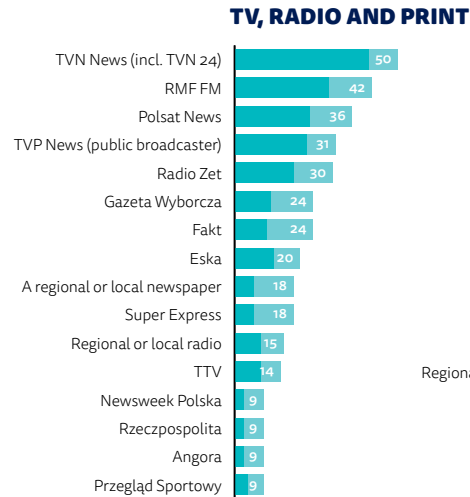
⁷⁴ wyborcza.pl/7,156282,23983125,audio-pozostanie-nisza-ale-przychodowa-jak-zarabiac-na-podcastach.html

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

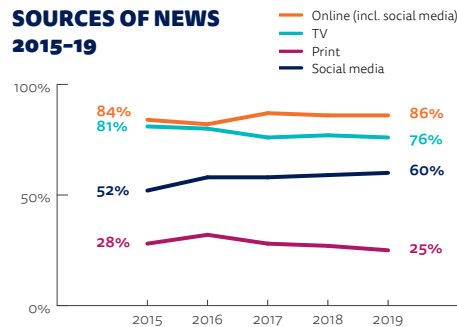
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



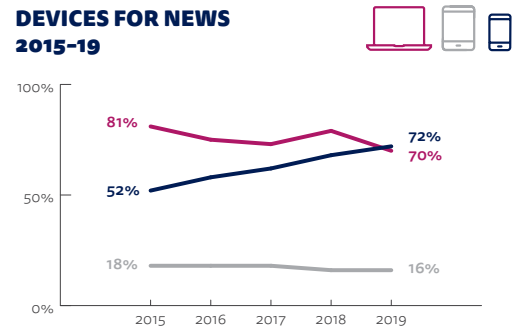
CHANGING MEDIA

Online and television remain the most important sources of news with popular portals like Onet and WP a defining part of the Polish media landscape along with extensive social media use (60% use for news). Meanwhile the smartphone has overtaken the computer as a way of accessing news for the first time.

SOURCES OF NEWS 2015-19



DEVICES FOR NEWS 2015-19

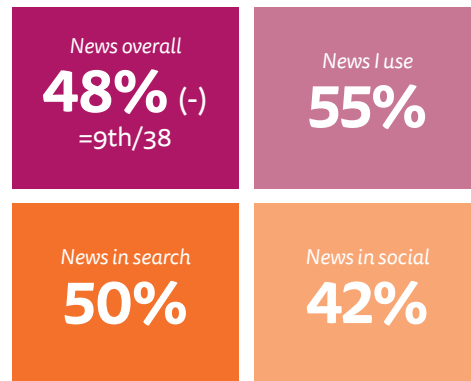


NB: 2018 figures for computer use were likely overstated due to an error in polling

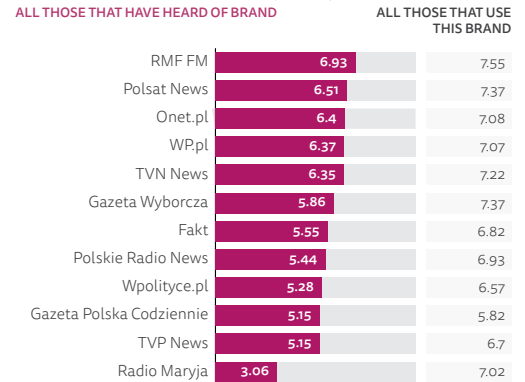
TRUST

The general trend is that private independent media score higher on a trust scale than public service broadcasters acting in recent years more like government cheerleaders. TVP's news tickers have become an object of memes among social media users. Despite significant indirect support from the government, partisan media failed to grow audience or trust.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



16%
pay for **ONLINE NEWS**

38%
listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	61% (+7)	77%
2	YouTube	39% (+2)	71%
3	Facebook Messenger	22% (+9)	53%
4	Twitter	10% (+2)	18%
5	Instagram	9% (+4)	27%
6	WhatsApp	9% (+3)	24%

43%
SHARE NEWS
via social, messaging or email

29%
COMMENT ON NEWS
via social or website

PORTUGAL

In an election year, the fight against fake news has gone mainstream with the Portuguese parliament giving draft approval to moves to tackle disinformation. Nevertheless, trust in news remains among the highest in the countries surveyed.

The challenges of fake news and disinformation have been highlighted by elections at national, local, and European levels. Legislation is being considered in parliament and the media regulator, the ERC, has produced an evidence-based report to inform the debate. There have already been several initiatives to address the issue, including a conference hosted by the Portuguese news agency LUSA, and the launch of a website dedicated to fighting disinformation.⁷⁵ Additionally, investigative journalist Paulo Pena undertook an in-depth investigation for leading paper *Diário de Notícias*, which revealed the connections of some fake news and disinformation sites to social media platforms, as well as their methods and backers.

In June 2018 *Diário de Notícias*, which is one of the oldest Portuguese papers and part of the Global Media group, abandoned its daily print edition, instead investing heavily in its online edition. It still prints an edition on Saturday, but Executive Editor-in-Chief Catarina Carvalho said this approach does not mean that the paper will become a weekly. The aim, she said, was to consolidate the brand as a daily source of news in a renewed digital environment. There were no job losses as a result for now, even if some staff have been transferred to other brands within the Global Media Group. It also owns the daily *Jornal de Notícias* and legacy radio broadcaster TSF.

Printed paid circulation continues its steady annual decline across the sector and at the same time there has been little progress in getting users to pay online. The proportion paying for any online news including subscription, membership, and one-off payment is just 7%, one of the lowest in our survey.



The Media Capital Group, owner of the TVI news channels as well as radio channels like Rádio Comercial, hit the headlines in 2018. The group, considered highly profitable and currently owned by Spanish media giant PRISA, became a takeover target by telecom multinational Altice. The acquisition didn't go through, though there have been hints that other media companies might be interested. Telecoms regulator ANACOM has insisted that talks about media and telecom mergers and acquisitions should be closely watched because of the risks to competition and the dangers of market concentration. The move towards digital and the social impact of online has been encouraged by investment from telecoms providers in new forms of data contracts. Most of these offers target the key 18–35 demographic and rely heavily on zero-rating tariffs on selected apps, a situation that strongly benefits international players such as Google and Facebook.

The sustainability of media groups and outlets continues to be difficult, with funding for innovation often coming from initiatives like Google's Digital News Initiative (DNI). In 2018 it financed five Portuguese projects to a total of €1.4m (Media Capital, Cofina, *Diário de Notícias*, Observador, and a pilot project from a start-up called 'The Mosted' which plans to offer journalists real-time metrics as they write). Most of these projects came from established media groups, but there was also funding for Fumaça, a podcast produced by an independent journalism group which also received funding from the Open Society Foundations, and which is making an impact in the media landscape.

STATISTICS

Population	10m
Internet penetration	78%

Meanwhile leading Portuguese publishers have continued to push ahead with their innovative data-sharing platform Nónio, which aims to provide an alternative login system to Facebook and Google. Users only need to log in once to be recognised across the hundreds of news websites, including magazine and news brands, as well as TV and radio on-demand services.

Portugal has been consistently at the top of the rankings for trust in the news, according to this survey. Nevertheless, it has witnessed the birth of its first standalone fact-checking platform.⁷⁶ Polígrafo launched in November 2018, with an experienced journalist as director and major backer. Funded by private investors, the platform has seen interesting growth rates in its first months. In 2019 several universities developed partnerships with media outlets, journalists' professional bodies, and lifelong learning organisations to fight fake news and propaganda.

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⁷⁵ combatefakenews.lusa.pt

⁷⁶ O Observador (online media outlet) already had a fact-checking space within its website.

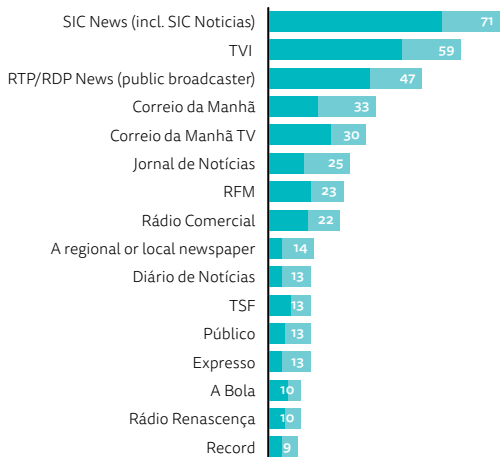
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

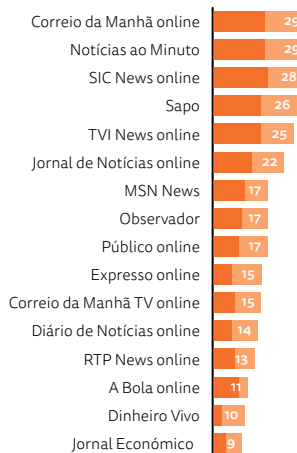
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



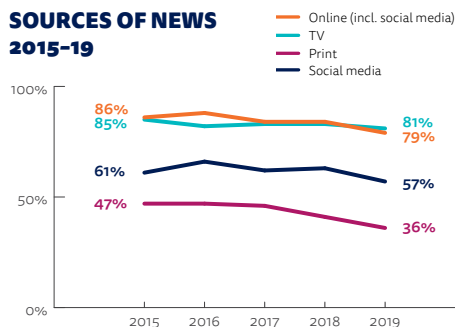
ONLINE



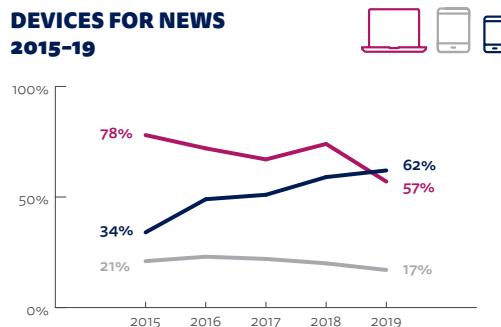
CHANGING MEDIA

Television is increasingly challenged by online and social media as the most important source of news. WhatsApp now reaches almost half of our sample (47%) and is used by five times more people for news than in 2015. Instagram is growing fast with the young.

SOURCES OF NEWS 2015-19



DEVICES FOR NEWS 2015-19

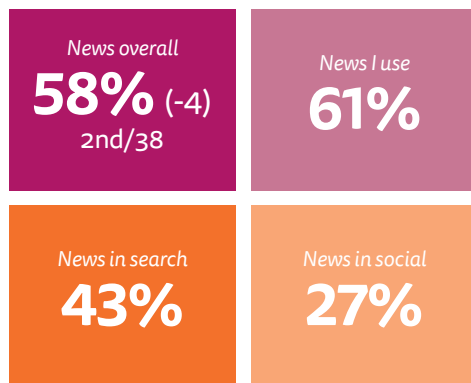


NB: 2018 figures for computer use were likely overstated due to an error in polling

TRUST

This year trust overall has come down to 58% (-4), perhaps due to heightened concern about misinformation, but still leaves Portugal in second position across 38 countries. Public broadcaster RTP remains the most trusted brand with tabloid *Correio da Manhã* least trusted – but widely read in both print and online.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	All those that have heard of brand	All those that use this brand
RTP News	7.41	7.9
SIC News	7.31	7.62
Expresso	7.19	7.93
Jornal de Notícias	7.17	7.68
Rádio Renascença	7.09	8.07
Diário de Notícias	7.07	7.63
Público	7.04	7.76
RDP Antena 1	6.98	7.94
TVI News	6.77	7.3
Sapo	6.47	7.26
O Observador	6.38	7.53
Correio da Manhã	5.45	6.22

7% pay for **ONLINE NEWS**

34% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	53% (-)	77%
2	YouTube	24% (+2)	70%
3	Facebook Messenger	20% (+1)	61%
4	WhatsApp	15% (+4)	47%
5	Instagram	12% (+6)	40%
6	LinkedIn	6% (-1)	17%

49% **SHARE NEWS** via social, messaging or email

29% **COMMENT ON NEWS** via social or website

ROMANIA

With established political parties and institutions facing a crisis of confidence, Romanians seem to be taking it upon themselves to solve the country's problems with the help of mainstream newsrooms and independent journalistic projects. Yet trust in news overall has dropped by 7 percentage points since 2018 – the effect of a perfect storm that hit Romanian media amid an intense election period.

Romanian newsrooms are underfinanced, overworked, and vulnerable to economic and political pressures. This is not an ideal position in a year when the country took the rotating presidency of the Council of the European Union and is going through a series of important elections.

At European level, the Romanian government faced intense criticism on anti-corruption and justice issues. The response domestically from leaders of the ruling coalition has been to step up anti-European and populist rhetoric, including encouraging conspiracy theories. The targets have been the so-called 'parallel state', which is purportedly run by secret services, and uses the judicial system to decimate the political elite, the banking system, George Soros, and foreign investors – which are supposedly trying to impoverish Romania in order to subjugate it.

These themes were widely covered by polarised newsrooms, often with inflated vocabulary and varying degrees of outrage, though some newsrooms tried to maintain balance. The National Audiovisual Council took timid steps to try to keep TV stations in line with legislation, but they did not prove effective.

The top two media brands, which are widely followed by the digital public both online and offline, are a generalist TV channel, ProTV, and an all-news television, Digi 24. They are both part of publicly traded companies, on NASDAQ and on the Romanian stock exchange, respectively. Both newsrooms tried to keep balance in covering breaking news and investigative reporting. ProTV,



especially, leveraged its mass-market approach to support public information campaigns on health, environmental, and other public issues. Thanks to this support, the project for the first paediatric oncology hospital in Romania managed to raise all the funds needed for its completion.

Balanced coverage helped some other media brands retain their audiences. This is the case with foreign-owned radio station Europa FM, with public radio Radio România Actualități (RRA), and with three strong online Romanian-owned brands, HotNews, Adevărul, and Ziarul Financiar. Other brands, that have carried more polarised coverage in supporting or criticising the government, showed a decline in declared usage, of up to 10 percentage points in the past three years: Antena 1, Antena 3, and România TV (pro-government), and Realitatea TV (anti-government). Two journalists from both sides of the divide played a prominent role as candidates in elections for the 2019 European Parliament.

Meanwhile public television, TVR, and public radio, RRA, continue to struggle to remain relevant to audiences – taking positions 5 and 11 in the list of most used offline brands – despite their stable finances. In 2018, for every €4 spent on advertising in Romania, €1 was matched from the public budget for the public service media. Concern about editorial independence in the face of political pressure has affected their credibility and limited their appeal. The president of public television, for example, was recorded criticising a journalist for being too aggressive with a politician from the ruling coalition.⁷⁷

STATISTICS

Population	20m
Internet penetration	74%

In parallel, *Libertatea*, a mass-market print title owned by the Swiss Ringier group, has been gradually changing its editorial positions ahead of elections. Its new investigative team uses social media to promote stories and has succeeded in sparking important debates. Facebook remains a significant gateway for access to news (68% of the digital public), and is regularly used to generate support for civic campaigns.

The decline of 7 percentage points in trust in 'news overall', is not due to a lack of public support for journalists. It may be the effect of a perfect storm of adverse conditions. Politicians are attacking journalists on a constant basis while the ruling coalition is adopting legislative changes which damage the judicial system but which are hard to explain to the general audience. Street demonstrations and protests, which had gone on for two years, decreased, meaning a drop in people's sense of urgency which had kept interest in the news alive. And last but not least, Romanian newsrooms maintained their tradition of attacking each other in order to position themselves. As usual, these attacks become more intense before elections and thus affect the general trust in journalism.

Raluca Radu

University of Bucharest

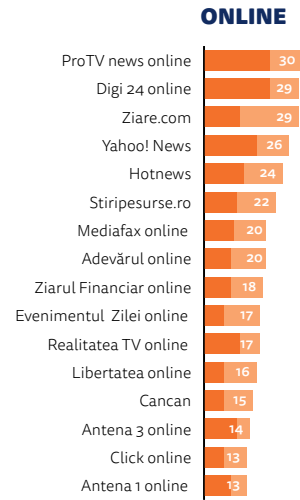
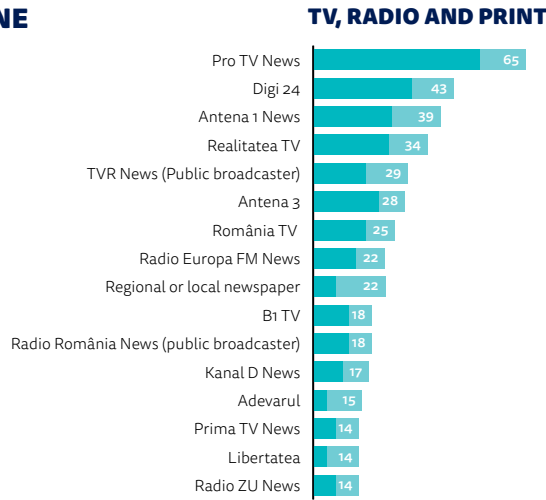
⁷⁷ Dragoș Pătraru, 3 May 2018, 'A message on the Freedom of Speech Day: Get your Paws off the Public Television', <https://patraru.ro/2018/05/03/un-mesaj-de-ziua-libertatii-de-exprimare-jos-labele-de-pe-tvr/>

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

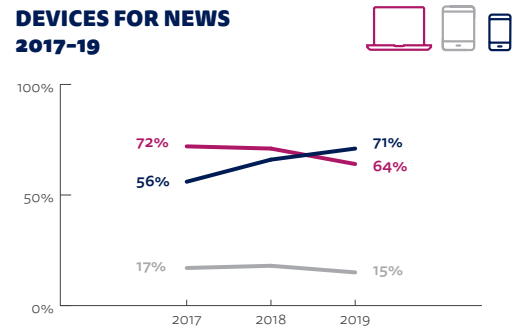
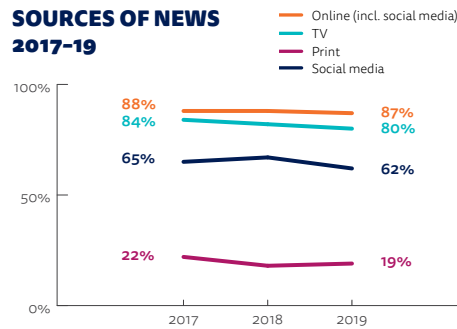
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



CHANGING MEDIA

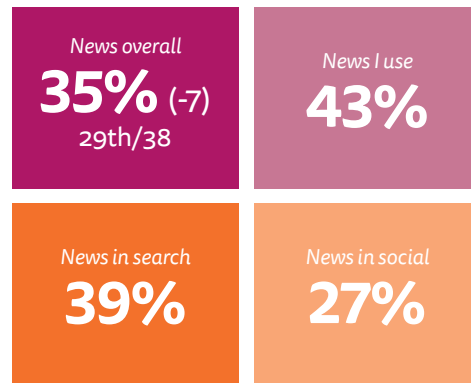
TV and online remain the most important news sources in Romania with declared printed newspaper consumption (19%) amongst the lowest in our survey. The smartphone (71% weekly use) has overtaken computers this year as the most important access point for digital news.



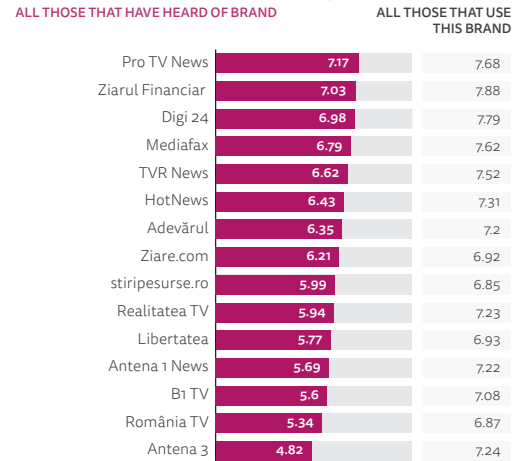
TRUST

Declining trust in the news puts Romania at the lower end of our international survey. Increased polarisation and rising political attacks on journalists are part of the explanation. The most trusted brands try to offer the most balanced picture on politics while more partisan brands tend to rate lower in general, though not with regular users of those brands.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



10%
pay for
ONLINE NEWS

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	68% (-1)	86%
2	YouTube	32% (+1)	78%
3	WhatsApp	23% (+5)	64%
4	Facebook Messenger	22% (+4)	62%
5	Instagram	10% (+3)	35%
6	LinkedIn	7% (+1)	24%

40%

SHARE NEWS
via social, messaging or email

32%

COMMENT ON NEWS
via social or website

SLOVAKIA

Journalism and the media not only made the news, they were the news in 2018, as the full repercussions from the murder of investigative journalist Ján Kuciak and his fiancée were played out in the judicial and political systems and in street protests.

The violent death of the young journalist, whose work focused on corrupt links between business and politics, continued to resonate in all spheres of Slovak public life. A wave of street protests 'for a decent Slovakia' prompted the resignation of the Prime Minister, Interior Minister, and Chief of Police. Then a series of leaks from the investigation kept journalism in the public eye, when it emerged that Marian Kočner, a businessman charged with commissioning the murder, had employed private detectives to gather information not just on Kuciak but on several other journalists whose investigations threatened his interests.

If this made many journalists feel angry and vulnerable, the protests demonstrated the commitment of civil society to a free and critical media. Tributes to prominent investigative journalists were repeatedly made from the podiums of the demonstrations. A centre for investigative journalism affiliated to the international Organised Crime and Corruption Reporting Project was later founded in Kuciak's name.⁷⁹

Our data do not, however, indicate an upsurge in public trust in news overall (down 1% and comparatively low) or in trust towards particular brands (also slightly down). This may reflect the unceasing flurry of accusations about fake news and disinformation between 'mainstream' and 'alternative' platforms, fuelled by politicians. A generalised mistrust towards public information sources might best characterise broader public attitudes towards the media.



STATISTICS

Population	5.4m
Internet penetration	85%

Two cases illustrate the prevalence of disinformation in social media. One was the exposure of a PR agency which was running campaigns for politicians and commercial firms based on creating false social media accounts and discussion contributions.⁸⁰ Another was the repeated failure of Facebook to remove posts and suspend accounts when alerted about hate speech and false identities. A bone of contention for local media is that neither Facebook nor Google has a fact-checking partner for Slovakia, limiting people's opportunities to reliably assess reports of 'fake news' sites and posts.

Tensions continued between staff and management at the public service broadcaster RTVS amid concerns about the ability or will of top management to shield programme-makers from political pressure. More than a dozen staff have resigned from news and current affairs complaining of a poisonous working atmosphere.

Representatives of two of the governing parties, Smer-Social Democracy and the Slovak Nationalists, have repeatedly presented proposals that many see as hostile to the media. These have included reintroducing a clause in the Press Law to give politicians a broader right to reply (as was the case between 2008 and 2011, when Slovakia was criticised by international bodies for restrictions on press freedom), stiffer legislation on the responsibility of media for the content of online discussions, and replacing the industry-run press and digital council with a state-run body, which critics say would severely curtail professional self-regulation.

In the context of continued decline in print advertising revenues (according to Unimedia's forecast for 2019 the printed sector's share of advertising will fall to 8% against 34% for online), the German-Swiss media group Ringier Axel Springer sold its remaining printed titles (such as the leading daily *Nový Čas*) to Slovak buyers, retaining only its online brands, notably *aktuality.sk*. With the withdrawal, too, of Bauer Media, which had owned several magazines, this completes a remarkable U-turn in a sector which, for 20 years, was dominated by foreign capital.

Podcasts are a strong growth area for news consumption in Slovakia, after strategic investment by news media in the format. Currently the most popular is SME's *Dobré ráno* daily podcast, which attracts on average 17,000 listeners, about two-thirds the level of the newspaper's print sales. Second is *Denník N*'s weekday podcast *Newsfilter*, which had almost 10,000 downloads per day by February 2019, more than double print circulation. Third is *aktuality.sk*'s *Nahlas*. Podcasts are produced by many of the country's news magazines, pure players, commercial radio stations, and even the state news agency. The Apple podcast app is the most popular means of reception, even though more Slovaks have Android operating systems on mobile phones.⁸¹

Simon Smith
Charles University, Prague

⁷⁹ spectator.sme.sk/c/22024637/new-investigative-centre-will-look-for-cooperation-among-media.html

⁸⁰ It was eventually expelled from the National Association of Public Relations for breaching its ethical codes (dennikn.sk/minuta/1360244/).

⁸¹ podcasty.sme.sk/c/22024994/podcasty-v-roku-2018-statistiky-a-grafy-pocuvanosti.html

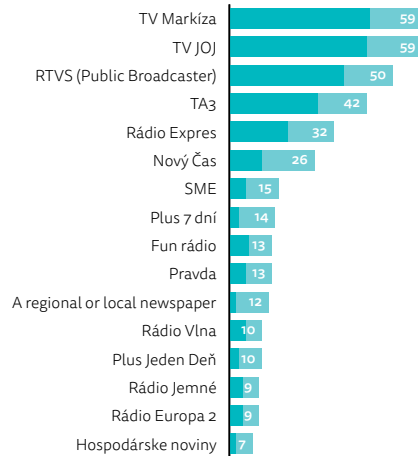
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

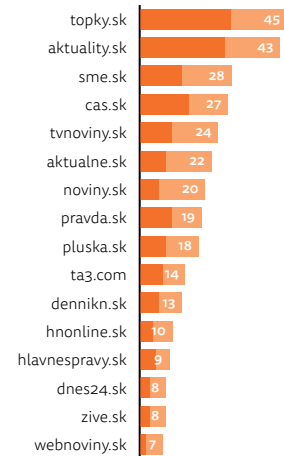
% Weekly usage



TV, RADIO AND PRINT



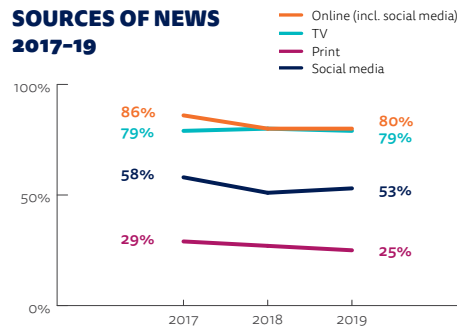
ONLINE



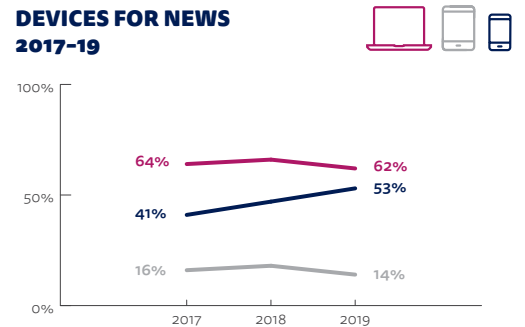
CHANGING MEDIA

TV and online news remain the most popular sources of news in Slovakia, with usage of print newspapers among the lowest in our survey. Smartphone use is growing but many people still access news using a laptop or desktop computer.

SOURCES OF NEWS 2017-19



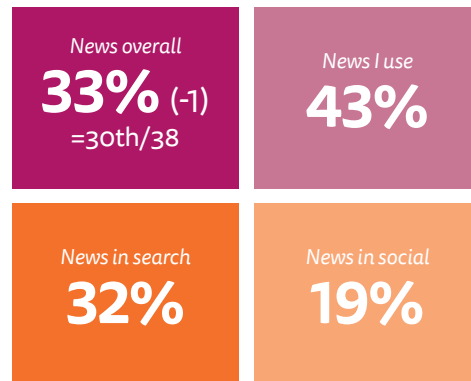
DEVICES FOR NEWS 2017-19



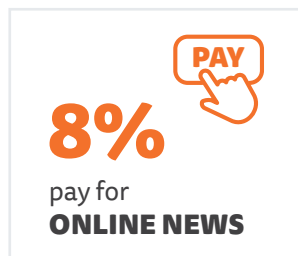
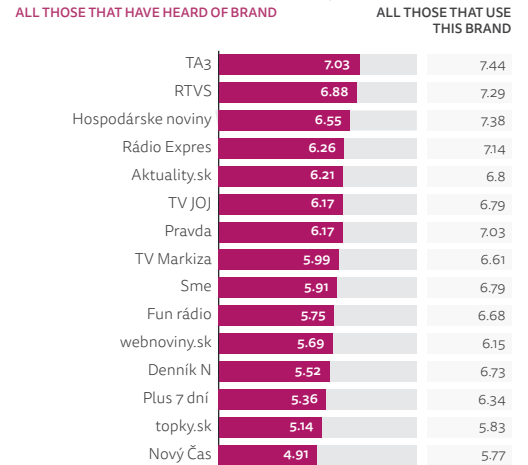
TRUST

Trust in the news overall remains amongst the lowest in our 38-country survey, though trust in specific news brands is higher. Those that featured in last year's sample show slightly lower levels of trust, but the order is identical, with the rolling news channel TA3 regarded for the second year running as the most trusted source and popular tabloid Nový Čas as least trusted.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	55% (+4)	76%
2	YouTube	26% (+3)	67%
3	Facebook Messenger	18% (+4)	51%
4	Instagram	8% (+3)	23%
5	Popec.sk	7% (+1)	15%
6	WhatsApp	5% (-)	20%



SPAIN

New management teams and revised editorial positioning at *El País* and RTVE took place against the backdrop of political change and turmoil in Madrid. In online news, the strongest pure players thrived while initiatives for regaining trust proliferated ahead of elections in April and May.

A no-confidence vote ousted Mariano Rajoy (Popular Party) as Prime Minister at the start of June 2018, and Pedro Sánchez (Spanish Socialist Workers' Party) formed a cabinet of ministers with eleven women and six men. Meanwhile, Soledad Gallego-Díaz became the first female editor-in-chief at *El País*, appointing a new management team. The paper faces double-digit falls in sales, even if *El País* still leads a market where the circulation of the main ten newspapers decreased by 92,000 copies in 2018. *La Vanguardia* unified its print and digital newsrooms and said it would redesign both editions during 2019. *El Mundo* also redesigned its website for its 30th anniversary.

Exclusive stories from *El Confidencial* and *Eldiario.es* resulted in the resignation of two ministers of the new government, one for having evaded taxes in the past and the other over doubts about how a master's degree was obtained. Both leading digital-born news services have recruited new staff, promoted others, and strengthened their European coverage. Amid the financial difficulties affecting millennial, social-media-dependent outlets, BuzzFeed Spain and Vocento's *Eslang* closed altogether, and Playground announced it was making more than half of its payroll redundant.

El País and *El Mundo* were the first Spanish partners of The Trust Project, and while Público launched a Transparent Journalism Tool, others focused on various fact-checking initiatives, with Facebook selecting Newtral, Maldita.es, and AFP as partners to identify disinformation in Spanish. Voice news services are now available via Alexa, Google, and Siri from a range of providers, including CCMA in the Catalan language, with news from EITB in Basque in Amazon's service.



STATISTICS

Population	46m
Internet penetration	93%

The process of renewing the governing board of public broadcaster RTVE was delayed by pleas from candidates against alleged unfair assessments. A failed parliamentary vote to choose an interim board for the national broadcaster was one of the first signs of the new government's weakness, and it resulted in the election of an interim administrator, Rosa María Mateo. President Sánchez's calling of a snap general election for 28 April, just four weeks before the scheduled European, regional and local elections, caused the process to stall for even longer. Meanwhile the television service of the new Valencian public corporation À Punt Media, maybe the first of its kind to be truly multi-platform from launch, went to air in June 2018 and it has seen a slow but steady uptake in its first year.

Alternative approaches for covering news are being tested on the second channels of the three main broadcasters. In TVE, *La 2 Noticias* was taken off air for several weeks, while staff changed their workflows to create a transmedia brand, now producing as much for online and social as for TV. Atresmedia increased the live weekday news, current affairs and infotainment programming in *laSexta* up to 15 hours/day, with the addition of a new breakfast show *Arusitys* from 7:30 to 11am. And in February 2019, just after fieldwork was completed for this survey, Mediaset folded the two daily programmes of *Noticias Cuatro*, and their website, into a new current affairs brand, *Cuatro al día*. The better-performing weekend editions retain the editorial tone of a newscast and are still produced by Mediaset's news division, but on weekdays it is now a broader-ranging talk show with on-the-field reporters, studio discussion,

and just some breaking news. The schedule includes a new show 'analysing "fake news" and "clickbait" with humour', *Todo es mentira* ('Everything is a lie'), presented by Risto Mejide, a broadcaster, advertising boss, author, and former talent show judge. Mediaset, which also cancelled its daily live three-hour midday politics show *Las mañanas de Cuatro* in June 2018, is reportedly working on a new online news operation.⁸²

While the bigger news brands still compete for volume, big media groups Prisa and Vocento have started to sell programmatic advertising together. Vocento continued to roll out a strict metered paywall across more of its regional titles, under the ON+ brand. Meanwhile another regional newspaper chain, Prensa Ibérica, bought Grupo Zeta, publisher of *El Periódico* (in Catalonia and other regions), *Sport*, and a handful of magazines. According to the National Commission on Markets and Competition, by mid-2018 one in three internet-connected households in Spain now use paid-for platforms to watch audio-visual content online, with Movistar+ slightly leading over Netflix.

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Center for Internet Studies and Digital Life,
University of Navarra

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

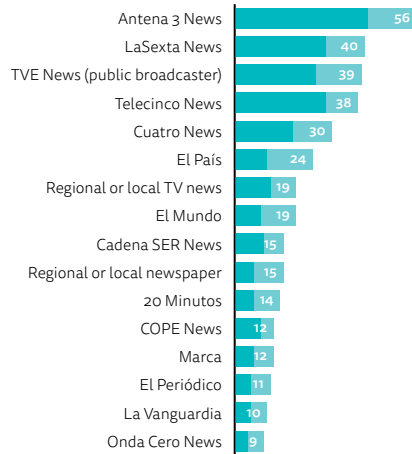
CHANGING MEDIA

Consumption is more mobile than ever before, with two in three using their smartphones to access online news. Market penetration of fibre-to-the-home connections in Spain is 44% of households and the country tops yearly growth according to FTTH Council Europe – this may explain why 21% claim to use the internet features of connected or smart TV to catch up with what is going on.

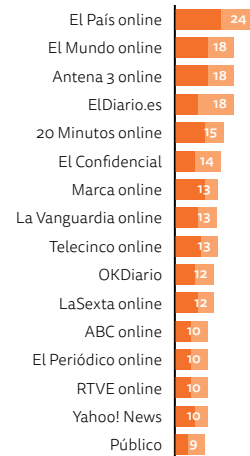
TRUST

Trust in news among Spanish internet users remained stable, as they continued to access a broad number of sources. During fieldwork in January, debates about the role of the media had to do with the mostly sensationalistic treatment of the disappearance and attempted rescue of a 2-year-old boy stuck in a shaft, which filled pages and airtime and boosted audiences for two weeks.

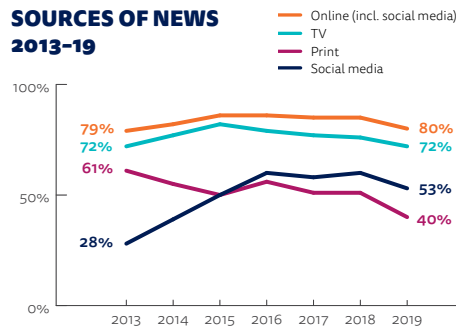
TV, RADIO AND PRINT



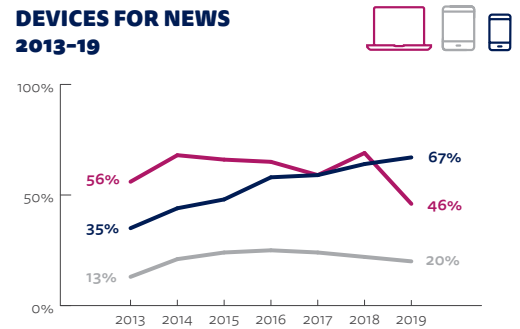
ONLINE



SOURCES OF NEWS 2013-19

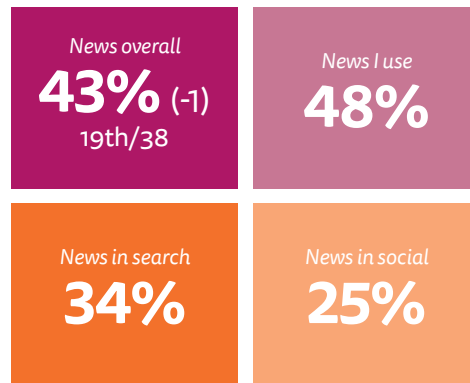


DEVICES FOR NEWS 2013-19



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DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



10%
pay for
ONLINE NEWS

39%
listen to
PODCASTS in
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TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	47% (-1)	73%
2	WhatsApp	36% (-)	78%
3	YouTube	26% (-)	68%
4	Twitter	16% (-6)	29%
5	Instagram	12% (+4)	38%
6	Facebook Messenger	7% (+2)	27%

52%
SHARE NEWS
via social, messaging or email

27%
COMMENT ON NEWS
via social or website

SWEDEN

Sweden is a digitally developed country marked by a mix of public service broadcasters, commercial legacy news media, and emerging alternative news media. Domestic news publishers have lost much of their advertising revenues in recent years, with many hoping that increasing reader revenues will make up some of the gap.

From 2008 to 2018 Swedish commercial news media lost more than one-third of their advertising revenues, and since figures are quite stable for television, the biggest losers are organisations formerly known as newspapers. Clearly, the digital and mobile advertising markets have grown over time, but most of that growth has gone to global platform companies such as Facebook and Google (and increasingly also Amazon). Advertisers have also shifted marketing spend towards paying influencers to talk about their brands, especially on Instagram and YouTube.

So far Swedish news media remain in business, albeit a great number are dependent on press subsidies from the Swedish state, with a budget of nearly 500m SEK (US\$53m) in 2018. Following a media inquiry, the government decided to increase subsidies to publications that regularly produce original news content comprising at least 55% of their content, and have at least 1,500 news consumers, predominantly in Sweden. Support for print has increased by 10%, with distribution support increasing by 50%. The new deal also adds more support for innovation and a subsidy of up to 1m SEK to local areas with limited news provision (so-called news deserts).⁸³ Meanwhile, public service broadcasters continue to attract sufficient reach among the Swedish population (and the young) to maintain their legitimacy and public acceptance for the tax payments. The publicly funded television company SVT has reworked their proprietary website, while SR continues to work strategically with non-proprietary social media platforms, and has experimented with atomised audio. SR produces a substantial number of podcasts, which are also accessible via commercial audio streaming service provider Spotify.



STATISTICS

Population	10m
Internet penetration	97%

In Sweden many news media have continued to cut staffing levels and improve efficiency. Some have implemented or expanded their use of the services for automated content production offered by companies like United Robots. Others, like the largest local news organisation in Sweden (MittMedia), have focused on developing and running better technical systems for their digital news publishing, analytics, and advertising sales. This has allowed them to syndicate news more easily, as well as increasing revenues across 28 local markets.

Our Digital News Report survey data show that 27% of Swedes have paid for online news in the last year, one of the highest levels in our survey. Several news publishers offer special promotions with reduced pricing to convert readers into registered subscribers. However, churn rates are often high, with many people ending subscriptions after the promotional period ends.

Swedish news publishers continue to accelerate their efforts to increase reader revenue, experimenting with different approaches to online subscription models. MittMedia made a bold move during the autumn, enforcing a paywall for all of their own news materials (not newswire materials), and across their portfolio of local news publishers. Before making this move, their data scientists, analysts, and business developers carried out tests with such paywalls on a small selection of local markets. A baseline requirement for reader revenue also involves making use of functioning systems for subscriber management. In 2018 Bonnier Magazines lost approximately 10–20% of all their subscribers in the course of a few months due to problems with their systems.

The shift to a reader revenue model will require changes to analytics infrastructure and the metrics used for understanding the needs of existing and potential customers. In light of this, some Swedish news publishers are trying to reduce their dependency on platform companies by focusing more on creating value on their own websites and apps (Chua and Westlund 2019). Having said this, several news media recently partnered with Facebook over fact-checking ahead of and throughout the general election, to combat disinformation.

Lastly, let us turn to partisan and alternative sites, what Holt et al. (2019) conceptualise as 'alternative news media'. In Sweden these are mostly found on the right wing, and have positioned themselves as 'alternatives' for those who do not find legacy news media credible. Fria Tider, Nyheter Idag, and Samhällsnytt are the three most widely used, each reaching around one-tenth of the Swedish online population on a weekly basis, according to our recall-based survey. These figures are comparable to survey findings for the two largest quality newspapers *Dagens Nyheter* and *Svenska Dagbladet* in print and a bit lower than their online news consumption figures.

Oscar Westlund

Oslo Metropolitan University, Volda University College, and University of Gothenburg

⁸³ www.nordicom.gu.se/en/latest/news/new-media-subsidy-scheme-suggested-sweden

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
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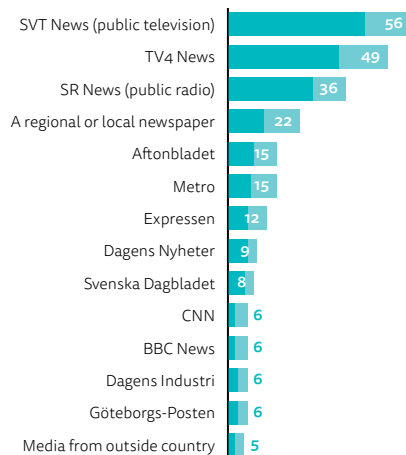
CHANGING MEDIA

TV and online news remains stable, but newspaper reading and social media news access have dropped significantly. The latter is explained by Facebook changing their algorithms to expose their users to less news, but also because news publishers' are focusing more on their own websites. 70% access news via smartphone, one of the highest figures in our survey.

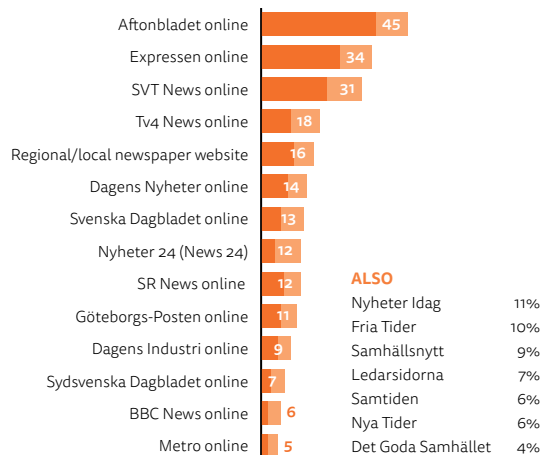
TRUST

Four out of ten Swedes express a general trust in the news, similar to previous years. Trust is naturally higher for the news sources people regularly turn to. Swedes express somewhat lower trust in news found through search engines, and express substantially less trust in news exposed via social media.

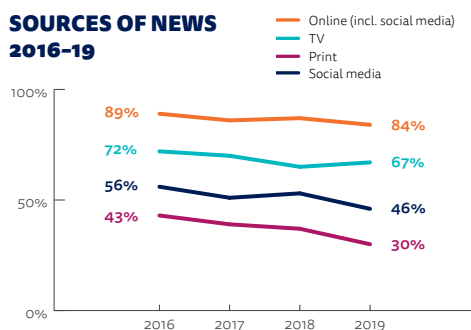
TV, RADIO AND PRINT



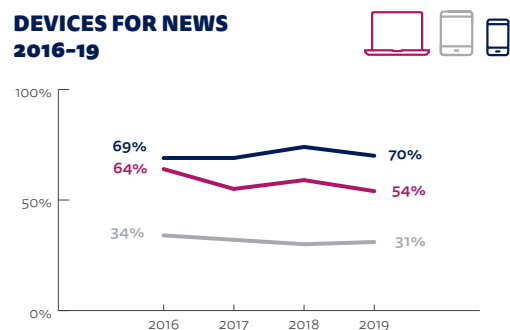
ONLINE



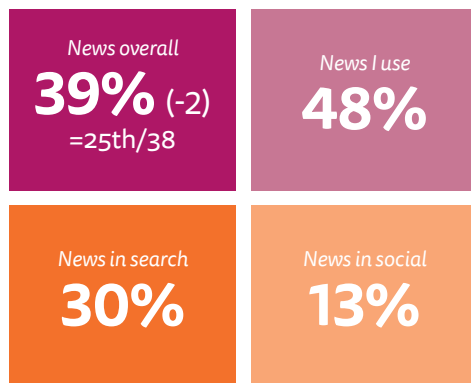
SOURCES OF NEWS 2016-19



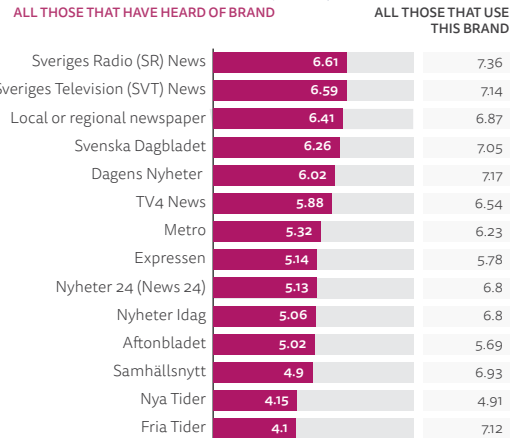
DEVICES FOR NEWS 2016-19



DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



27% pay for **ONLINE NEWS**

35% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	32% (-4)	71%
2	YouTube	14% (+1)	64%
3	Facebook Messenger	10% (+1)	50%
4	Instagram	9% (+2)	50%
5	Twitter	8% (-)	16%
6	WhatsApp	3% (-)	19%

27% **SHARE NEWS** via social, messaging or email

19% **COMMENT ON NEWS** via social or website

SWITZERLAND

STATISTICS

Population	8.5m
Internet penetration	91%

The media industry has become increasingly focused on cost-cutting and consolidation in this small and linguistically segmented news market. These trends are further reducing the diversity of outlets and opinions – problematic in an election year, and for Switzerland’s direct-democratic system in general.



Media organisations have continued to bear down on costs in the face of stiffening economic headwinds – with centralised newsrooms becoming standard. A new joint venture (CH Media) is merging all content, except regional news, for its outlets such as *Luzerner Zeitung* and *Aargauer Zeitung*. The company announced in 2018 it would cut 20% of its journalists in the next few years. In a similar move, Tamedia, Switzerland’s largest private media company, installed central newsrooms for its German-speaking and French-speaking outlets such as *Tages-Anzeiger*, *24heures*, and *Basler Zeitung*, a traditional newspaper it had only recently bought from Christoph Blocher, a well-known right-wing politician. Only Tamedia’s *20 Minuten* and *20 minutes*, Switzerland’s largest online and offline brands (offering tabloid-like journalism), have kept their own newsrooms. To cut costs, publishers have given up parts of print production in 2018; Tamedia’s *Le Matin*, a traditional and popular tabloid, and Ringier’s *Blick am Abend*, a widely circulated free-sheet, have become online-only outlets.

These mergers and centralised newsrooms have reduced the diversity of content. Most international and domestic political news coverage, including commentary, is increasingly shared among outlets belonging to the same company. Taking three different news outlets of Tamedia as an example, 68% of political commentary is now identical.⁸⁴ This shrinking diversity is a problem in a country where the diversity of opinions is institutionally needed, since several referendums take place each year.

Worries about diversity also affect the multi-lingual public service broadcaster SRG SSR (including SRF and RTS), which announced in 2018 it would centralise more resources in its main studio in Zurich at the expense of Bern, where its prestigious radio studio would be given up. Similar ideas are being tested in French-speaking Switzerland. Politicians have launched a bid in Parliament to stop the moves. The SRG SSR, which won a widely debated referendum in early 2018 on the abolition of the licence fee, is under political pressure again.

At the same time, the SRG SSR and private media organisations are taking a few steps to increase co-operation. While SRG SSR is leaving the advertising platform Admeira, which had been seen as a threat by some private operators, it is joining with private media in a national radio player app. They are also planning a ‘log-in alliance’ which would allow sharing of user data for targeted advertising. Swiss media have come to identify global tech companies as the cause of their problems, even as they offer even more content on social platforms, including those which had been neglected (*20 Minuten*, for example, is planning a WhatsApp newsletter). Thus, as in the EU, Swiss publishers are seeking financial compensation from Google and others through new copyright laws.

The financial situation for publishers remains difficult, not least because more companies, most notably Switzerland’s largest telecom provider, have stopped advertising in newspapers completely. Tamedia, for instance, is still profitable but mainly because of businesses other than news.

While it claims increasing digital news subscriptions (e.g. day passes), the data from this year’s survey again show that the number of Swiss willing to pay for online news remains very low (11%). The ‘news-deprived’ now constitute the largest (36%) and fastest-growing group, where if people consume content at all, it tends to be from more popular sources and mainly accessed via social media.⁸⁵

Media companies are experimenting with new formats. Tamedia is testing ‘robo-journalism’ on referendum results, producing hundreds of articles based on polls which are customised for each voting district. Ringier has recently hired a well-known political news anchorman to enhance its efforts in producing video on its widely used websites, and *Neue Zürcher Zeitung* works with a newsletter tailored for audiences in neighbouring Germany. It increasingly offers its articles in audio, as does the digital-only Republik.

Conditions for new players remain difficult. Watson.ch (launched in 2014) has found an audience but is not profitable, and new players like crowdfunded Republik still are niche products. Thus, success for planned start-ups in French-speaking Switzerland like Heidi News (partially supported by Google’s News Initiative) is by no means guaranteed.

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 Research Institute for the Public Sphere and Society, Department of Communication and Media Research, University of Zurich

⁸⁴ See the summary of the ‘Yearbook Quality of the Media 2018’ (in English, French and Italian) and the full version (in German) at www.qualitaet-der-medien.ch/downloads

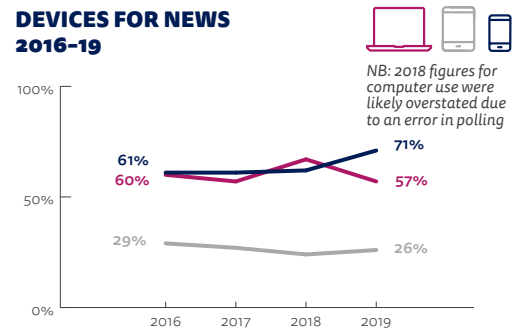
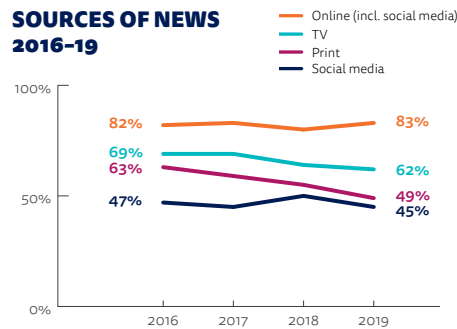
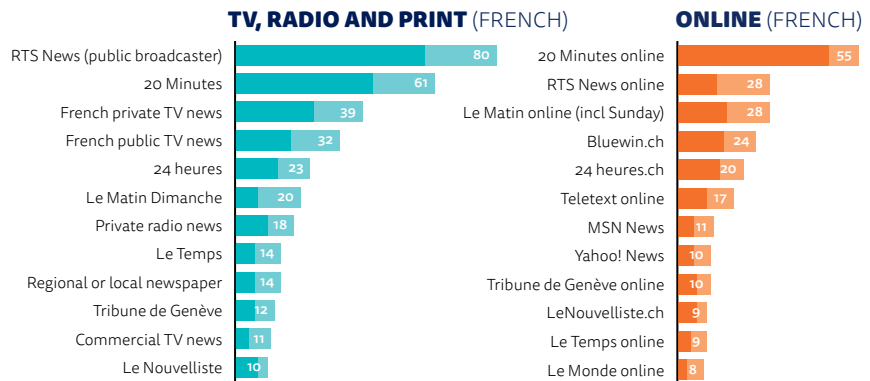
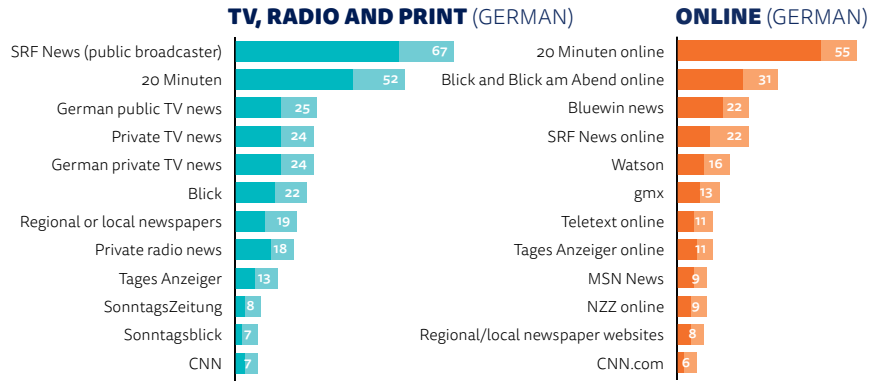
⁸⁵ Yearbook ‘Quality of the Media 2018’, www.qualitaet-der-medien.ch/downloads

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

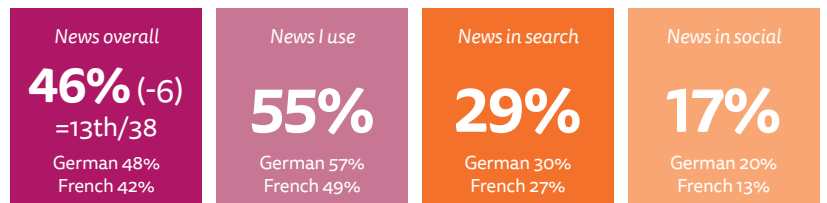
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



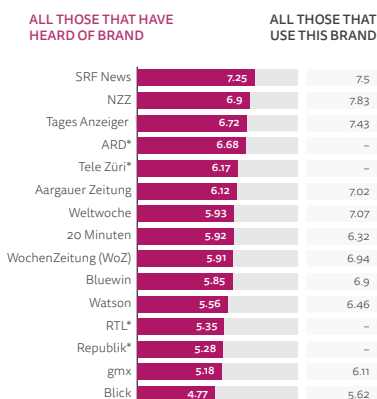
TRUST

Trust this year is back to the same level as in 2017, with higher trust last year probably resulting from the strong and highly visible counter-reactions against the referendum proposal to prohibit licence fees. Interestingly, however, trust in individual brands remains as high as in 2018.

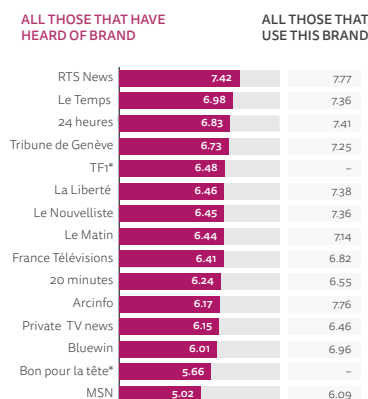
DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10) (GERMAN)



BRAND TRUST SCORES (0-10) (FRENCH)



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	32% (-1)	60%
2	YouTube	26% (+2)	64%
3	WhatsApp	26% (+4)	74%
4	Instagram	10% (+3)	32%
5	Facebook Messenger	8% (+1)	32%
6	LinkedIn	6% (-1)	17%

* Some brands do not have trust scores for users of those brands (did not meet minimum 50 threshold or did not specifically ask about the use of the brand)

TURKEY

STATISTICS

Population	82m
Internet penetration	68%

The ruling party has strengthened its control of the Turkish media over the last year with the sale of the leading media group to a pro-government businessman. Television remains the most important source of news in Turkey while social and digital media are an important outlet for alternative and critical perspectives.

The sale by the main Turkish media mogul Aydın Dogan of all his media outlets to Demirören Holding, a pro-government conglomerate with interests primarily in energy and construction, was the most significant development in Turkish media over the past year. As with the sale of Turkuvaz Media in 2008, the transfer took place with the help of credits from the state bank.⁸⁶ As expected, several experienced journalists were fired, editors were changed, and the coverage became pro-government in all media outlets in the group.⁸⁷ Although Dogan Group's capability for criticising the government of President Tayyip Erdoğan had already eroded before the sale, coverage has become more explicitly supportive of government lines. The fact that the transfer included the internationally known daily *Hürriyet* is particularly important. Its coverage reflects the political transformation in the country.

The second development was the ending of the print edition of two newspapers, *Habertürk* and *Vatan*, in mid-2018 due to reduced sales and rising costs. The former was one of Turkey's largest-circulation newspapers, and its CEO explained the move saying: 'The cost of publishing a newspaper has become unsustainable at a time when advertisements are mainly channelled into digital media outlets and broadcasters.' The circulation of Turkish newspapers and their share of advertising revenues has been declining steadily, while printing costs have also risen as a weak Turkish lira makes imported newsprint



more expensive.⁸⁸ Other newspapers have either reduced pagination or axed their Sunday supplements. Some local newspapers have also ended print editions. Annual total circulation of printed newspapers and magazines fell 33% from 2013 to 2017.⁸⁹ Given this background, it would be no surprise if other newspapers were to close in the near future.

The most popular online media listed in this year's survey include only two outlets which are critical of the government (*Sözcü* and *Cumhuriyet*), along with foreign media like the BBC. The independent watchdog Freedom House classes Turkey as being 'not free',⁹⁰ and in this context social media and smaller internet sites have become the main platforms for alternative news. The opposition parties, for example, primarily used social media to reach the electorate during the presidential election campaign in 2018 and municipal elections this year.

While small-scale digital-born brands continue to provide alternative perspectives, they have not managed to achieve significant reach. Many showcase stories from international brands such as BBC Turkish, DW, and Euronews as they have limited staff to generate original content. Other perspectives are provided by foreign media like Russian-backed Sputnik, and a new Turkish version of the (UK-based) *Independent*, financed and run by the Saudi Research and Marketing Group (SRMG) that has close links to the Saudi royal family.⁹¹

More widely, the high levels of political and media polarisation in Turkey have been a fertile breeding ground for misinformation over the last few years. In this context, we've seen the emergence of a few credible fact-checking organisations such as *Teyit.org*.

Podcasts too are becoming increasingly popular, not only in news media but also in sectors such as sport, literature, science, and learning English. All of the main social media platforms are popular with young people in Turkey. WhatsApp and Instagram are particularly popular for news – but that cannot be explained simply by the fear of government surveillance, since they are also used widely by supporters of the ruling party.

Servet Yanatma

Turkish journalist and former Reuters Institute Journalist Fellow

⁸⁶ www.gazeteduvar.com.tr/ekonomi/2019/02/23/ziraat-bankasindan-demirorene-kredi-aciklamasi-paramiz-vardi-verdik

⁸⁷ www.middleeasteye.net/opinion/why-turkish-medias-credibility-dead

⁸⁸ www.hurriyetdailynews.com/turkish-daily-haberturk-decides-to-end-print-edition-134085

⁸⁹ Yanatma, S. 2018. *Digital News Report: Turkey Supplementary Report*. <https://reutersinstitute.politics.ox.ac.uk/our-research/digital-news-report-2018-turkey-supplementary-report>

⁹⁰ freedomhouse.org/report/freedom-world/2019/turkey

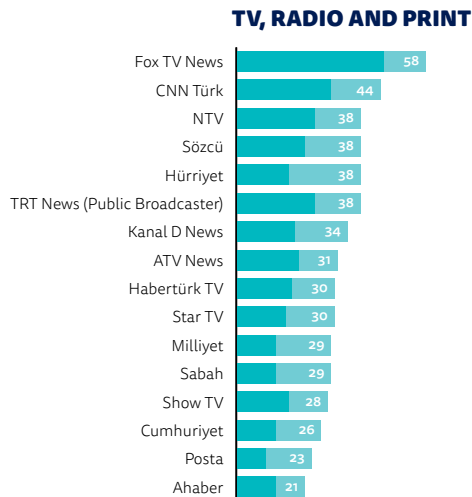
⁹¹ www.theguardian.com/media/2018/jul/19/independent-joins-saudi-group-to-launch-middle-east-websites

WEEKLY REACH OFFLINE AND ONLINE

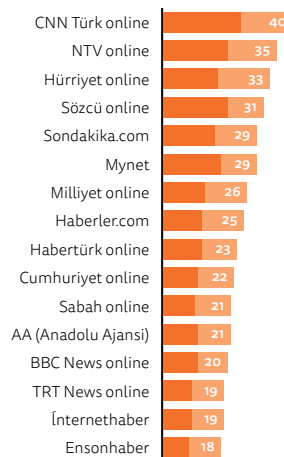
TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



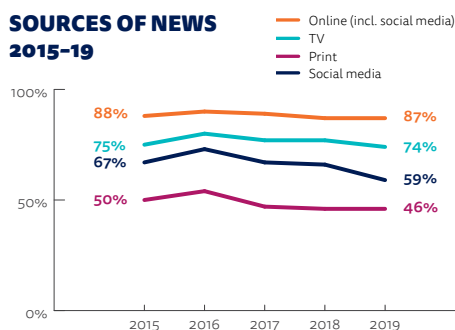
ONLINE



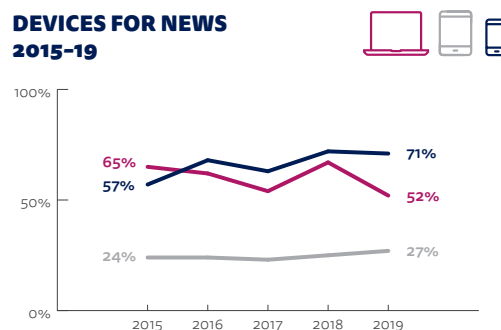
CHANGING MEDIA

Although online news is widely used by our urban-based sample, across Turkey as a whole television remains the most important source of news. Print newspapers also continue to be well read by international standards, though use is declining. Smartphones are now easily the most important device for accessing online news.

SOURCES OF NEWS 2015-19



DEVICES FOR NEWS 2015-19



NB: 2018 figures for computer use were likely overstated due to an error in polling

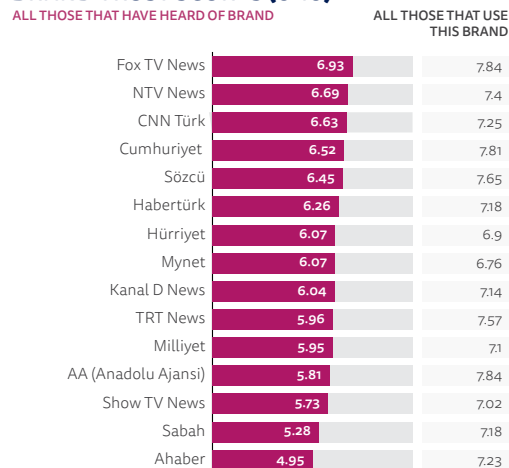
TRUST

Overall levels of trust in the news increased by 8 percentage points, although there doesn't seem to be any obvious explanation for such a dramatic change. TV news sources like Fox and NTV – along with critical voices like Cumhuriyet and Sözcü – tend to be most highly rated for trust. Pro-government media tend to be trusted less, though they have higher scores from those that use them.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



34% pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	YouTube	49% (+8)	76%
2	Facebook	47% (-4)	71%
3	WhatsApp	33% (+3)	74%
4	Instagram	33% (+9)	64%
5	Twitter	33% (-2)	49%
6	Facebook Messenger	10% (+1)	35%

60%

SHARE NEWS

via social, messaging or email



45%

COMMENT ON NEWS

via social or website





Section 3

Analysis by Country

Americas

Americas		
3.25	United States	118
3.26	Argentina	120
3.27	Brazil	122
3.28	Canada	124
3.29	Chile	126
3.30	Mexico	128

UNITED STATES

STATISTICS

Population	327m
Internet penetration	96%

The climate of heightened hostility toward the US press under Donald Trump shows no signs of abating as attention turns to the 2020 election. The relentless attacks appear to be exacerbating already low levels of media trust – especially on the right.

Over the last year, major US news outlets have reaped both audience attention and near-constant derision for their coverage of President Trump, and especially of the federal inquiry, headed by Robert Mueller, into whether his campaign colluded with Russia during the 2016 election. That inquiry yielded dozens of criminal indictments, but when it wrapped up in March without firmly establishing collusion, Trump and his supporters declared victory and called for retribution against CNN, MSNBC, BuzzFeed, and other news outlets they said misled the American public.

Warning against overcorrection, *Washington Post* media columnist Margaret Sullivan defended aggressive reporting on the Russia story from the *Post*, the *New York Times*, the *Wall Street Journal*, ProPublica, and others. Recent revelations included a trove of documents showing that plans for a Trump Tower in Moscow continued through the 2016 race – a major investigative coup for BuzzFeed. Meanwhile, the *New Yorker's* Jane Mayer exposed deepening ties between the White House and Fox News, including the charge that before the election the broadcaster buried a story on Trump's payoffs to adult film star Stormy Daniels.

These controversies have unfolded in a news environment in which audiences remain deeply polarised, much more so than most other countries covered in this report. Concerns about Trump's continued antagonising of the press as 'the enemy of the people' were reinforced in the wake of a shooting at the *Capital Gazette* newspaper in Annapolis, Maryland, in June 2018, that left five staff members dead.

News outlets are navigating this complex political environment in the face of persistent economic pressure. Job cuts have



affected a variety of publications, from the venerable *Cleveland Plain-Dealer* to digital-born First Look Media. Most notably, in January 2019, BuzzFeed laid off 15% of its worldwide workforce (220 positions) the same week that Verizon Media Group, which owns HuffPost, announced a 7% reduction across its media properties, totalling about 800 positions. Gannett, the largest news publisher in the US, also recently announced layoffs at local newspapers in regions around the country, stoking continued concerns about the future of local news.

Although viewership of local television news has held steady, a recent report finds that about 1,800 metro and community newspapers in the US have closed or merged since 2004, and more than 1,300 US communities have lost news coverage completely.⁹² New efforts to address these deficits include an expansion of ProPublica's Local Reporting Network; a reporting collaborative, sponsored by the Solutions Journalism Network, among local newsrooms and institutions in Charlotte, North Carolina; and a \$20m fund from the Knight Foundation and the Lenfest Institute to 'strengthen local journalism for the digital age'.

Significant growth in digital revenues remains elusive for all but a few large US news outlets. The *New York Times* announced in February that it had surpassed \$709m in digital revenues in 2018 and was on track to grow its digital subscriptions to more than 10m by 2025. Some digital-born organisations aimed to diversify revenue streams by introducing membership models, including BuzzFeed and Quartz. Meanwhile De Correspondent, the digital-born 'slow news' operation in the

Netherlands whose membership model has made it a darling of many commentators and pundits, announced plans for an English-language site in November. Enthusiasm quickly soured when CEO Ernst Pfauth revealed in March that De Correspondent would close its New York campaign headquarters and operate the English-language edition from Amsterdam.

The US continues to lead the world in podcast listening and has seen a wave of daily news-focused offerings. The *New York Times's* *The Daily*, which started in 2017 and now averages 1.75m daily downloads, has been joined by the *Washington Post's* *Post Reports*, Vox's *Today Explained*, Slate's *What Next*, ABC News' *Start Here*, and others. Another notable development saw VICE News partner with Spotify to produce the bilingual podcast series *Chapo*.

Platforms continue to invest in new initiatives to bolster the news industry. Google recently launched a boot camp for eight publishers in the US and Canada to develop new digital subscription strategies, while Facebook announced in January that it would dedicate \$300m to programmes focused on developing local newsrooms and content globally.

Despite such steps, there have been new calls to regulate platforms both from the left, led by presidential hopeful Senator Elizabeth Warren's plan to break up tech giants, and from the right, with prominent Republicans like Senator Ted Cruz accusing Google and Facebook of bias against conservative views.

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Reuters Institute for the Study of Journalism

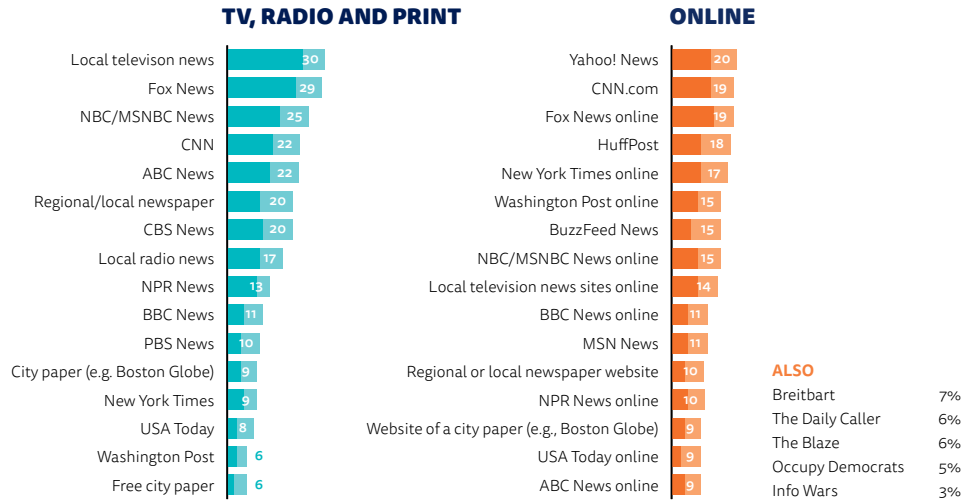
⁹² www.usnewsdeserts.com/reports/expanding-news-desert

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

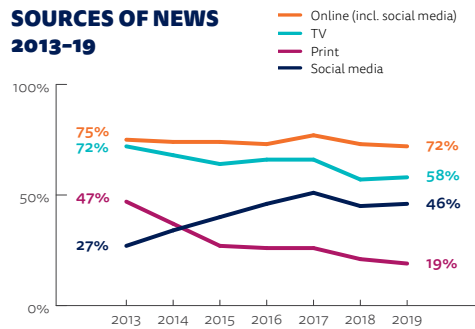
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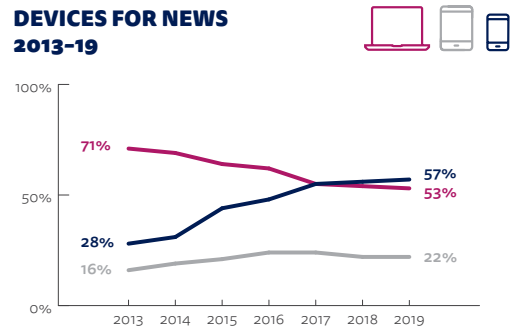
CHANGING MEDIA

The bump in news consumption is clearly visible in 2017 after the election of Donald Trump but since then TV, print, and social media news use is significantly down. Meanwhile the smartphone (57%) has overtaken the computer (53%) in terms of weekly news, with tablet usage flat.

SOURCES OF NEWS 2013-19



DEVICES FOR NEWS 2013-19



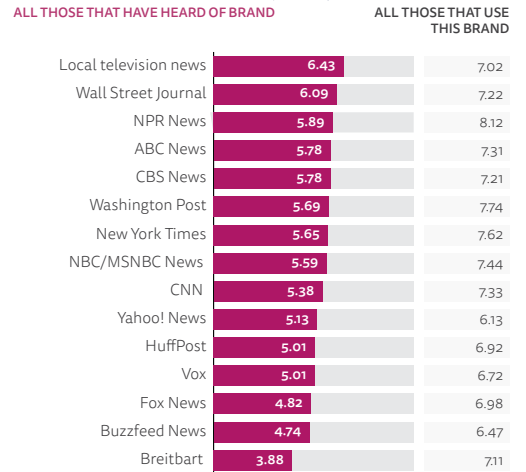
TRUST

Already low, overall levels of trust in news declined only slightly since last year, but this masks a deeper divide. Under Trump, trust in news has risen among audiences on the left while falling sharply on the right – from 17% to 9% in the last year alone.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



16%
pay for
ONLINE NEWS

35%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

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3	Twitter	15%	(+1)	27%
4	Facebook Messenger	9%	(+2)	40%
5	Instagram	7%	(+1)	29%
6	WhatsApp	4%	(-)	10%

37%
SHARE NEWS
via social, messaging or email

29%
COMMENT ON NEWS
via social or website

ARGENTINA

STATISTICS

Population	45m
Internet penetration	93%

The combination of an economic crisis and political polarisation has affected the media industry in Argentina. There have been significant job losses in newsrooms throughout the country, and hopes for a law which could have regulated media concentration were dashed when the legislation stalled in Congress.

News consumption in Argentina has decreased across all platforms, from print to social media, but print has suffered the largest losses, with circulations of the ten top-selling dailies down by 8% in 2018 compared to 2017. *La Nación*, the second-largest daily, closed its print plant early in 2019, which led to around 100 jobs being lost. Editorial Atlántida cancelled the weekly print editions of 97-year-old women's magazine *Para Ti* and 99-year-old children's publication *Billiken*. In all, more than 500 jobs were lost in the news media industry during 2018.⁹³

Paywalls have been one of newspapers' ways of responding to falling circulation numbers in the digital space. However, so far only three newspapers, top-selling *Clarín* and *La Nación* from the city of Buenos Aires, and *La Voz del Interior* from Córdoba have implemented them. *Clarín* reached 150,000 digital subscribers in December 2018.⁹⁴ However, only 8% of our survey respondents said they had paid for online news in the past year.

Due to competition with streaming services such as Netflix and YouTube, broadcast television ratings reached their lowest level since 2004 and advertising decreased significantly in 2018. Pay television had the highest market share ever, and in November 2018 Kantar Ibope media, in charge of measuring TV ratings, announced it would start measuring Time Shifted Viewing.

Political polarisation has influenced both telecommunication regulation and news coverage. In June 2018, the government formally approved the merger between Grupo Clarín, the largest media organisation in Argentina, and Telecom, a



telecommunications company. The newly merged corporation accounts for 42% of fixed telephone lines, 34% of the mobile telephony market, 56% of fixed internet connections, and 40% of cable television connections, in addition to owning the top-selling newspaper, the 24-hour news channel with the largest audience, the leading AM radio stations, and several FM radio stations.

Grupo Clarín's dominant position is evident in the ranking of the top brands examined for this report. The corporation owns three of the top ten brands in the offline ranking (TN, Canal 13, and *Clarín*), and three of the top ten brands in the online ranking (TN, *Clarín*, and sports newspaper *Olé*). However, for the second year in a row news website Infobae, which is not part of Grupo Clarín, was the top-ranked online brand. This year it also became the top-ranked brand overall.

The government drafted legislation which would have allowed other corporations to offer 'quadruple play' services (landlines, mobile phones, pay television, and broadband internet). The bill was approved in the Senate, but stalled in the Chamber of Deputies due to lack of consensus between the government and the opposition. The bill is not likely to pass during 2019, which is a presidential election year. The lack of a law means that media regulation is mostly conducted by executive order. Polarisation has also influenced news coverage of corruption scandals, with most media devoting space and attention according to their political alignments. Public media have remained relatively neutral, something which did not happen under the previous administration.

Political interference in media regulation and polarisation could be related to low levels of trust in news in general (39%) in 2019. There were also changes in news consumption on social media platforms, which increased on Facebook, WhatsApp, Instagram, and Facebook Messenger and decreased on Twitter and YouTube. Argentines spend, on average, more than three hours a day on social media, which could explain, at least partly, the growing reliance on these platforms for information. The role of social media will probably be a hot issue during the electoral campaigns this year, and several local and global organisations, such as Chequeado and First Draft News, respectively, are gearing up to combat false information on these platforms.

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Center for the Study of Media and Society, Argentina (MESO)

⁹³ Fopea (Foto de Periodismo Argentino). INFORME 2017–2018 Observatorio y alerta laboral de periodistas (2019), <https://www.fopea.org/informe-observatorio-y-alerta-laboral-de-periodistas-de-fopea-2017-2018/>

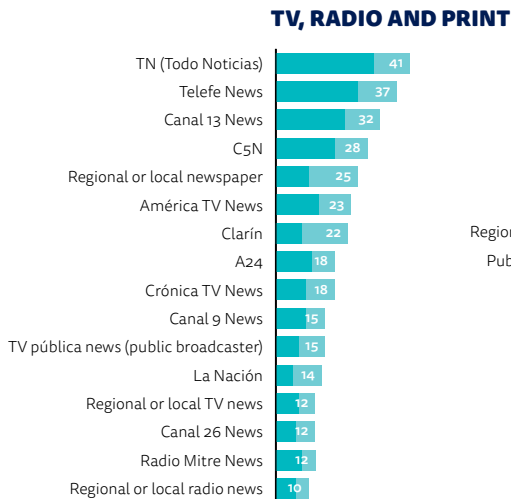
⁹⁴ Grupo Clarín, Memoria y Estados Financieros Consolidados, 2018, grupoclarin.com/IR/files/ESTADOS-CONTABLES/2018/GCSA%20-%20EEFF%20-%202012-2018.PDF

WEEKLY REACH OFFLINE AND ONLINE

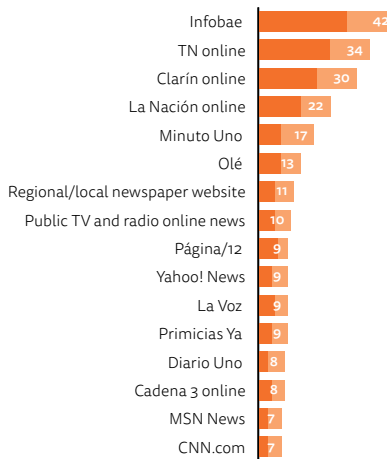
TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



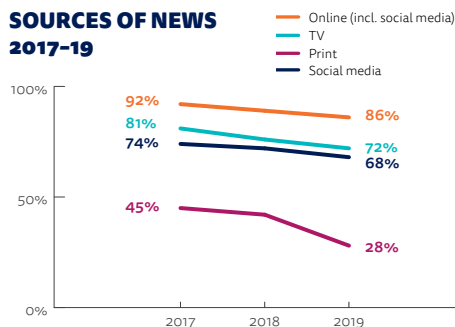
ONLINE



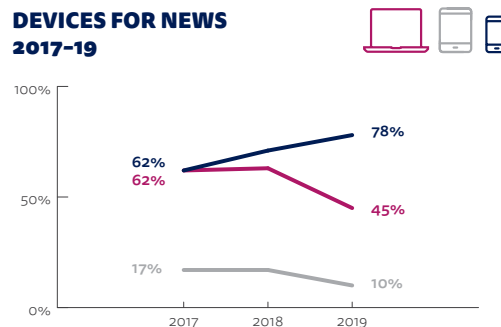
CHANGING MEDIA

Online and television remain the most popular sources of news in Argentina, while weekly print consumption has fallen from 45% to 28% over the last three years. Almost eight out of ten (78%) respondents say they now use the smartphone to access news.

SOURCES OF NEWS 2017-19



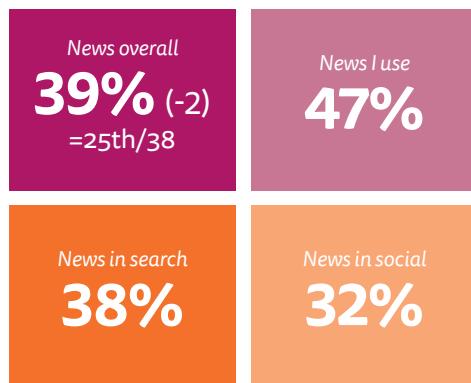
DEVICES FOR NEWS 2017-19



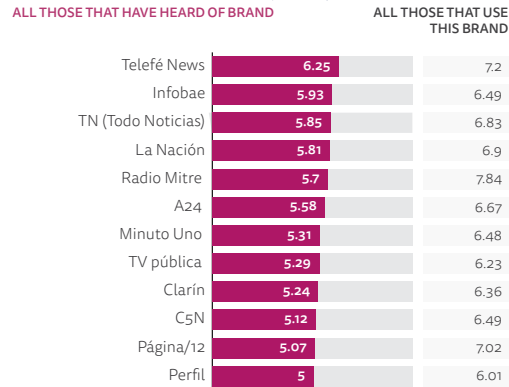
TRUST

Trust has declined from the previous year, from 41% to 39% for 'news overall' and from 51% to 47% in 'news I use'. However, trust in news in search remained stable and trust in news in social media went from 29% to 32%.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



8% pay for **ONLINE NEWS**

31% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	63% (+3)	83%
2	WhatsApp	39% (+2)	82%
3	YouTube	25% (-2)	73%
4	Instagram	18% (+5)	49%
5	Twitter	15% (-3)	24%
6	Facebook Messenger	11% (+2)	39%

56% **SHARE NEWS** via social, messaging or email

31% **COMMENT ON NEWS** via social or website

BRAZIL

The 2018 presidential election and its aftermath have galvanised the Brazilian media. The high political polarisation surrounding the poll set the stage for multiple controversies involving not only the candidates but also the way media covered the elections.

Social media and messaging apps played a crucial part in the campaign of former army captain Jair Bolsonaro, who was elected president with 57.8m votes in a run-off election – despite having had just eight seconds TV advertising each day during the first round. WhatsApp became a powerful campaign tool, with roughly a million open groups being created to promote candidates standing in the elections.⁹⁵

In an attempt to prevent fake news from spreading, the main Brazilian media outlets set up joint fact-checking projects during the campaign. The ‘Fato ou Fake’ team – comprising eight print, online, radio, and television outlets – fact-checked 759 quotes from politicians and several hundred rumours. Another 24 news brands joined ‘Projeto Comprova’, a coalition that received more than 67,000 messages through its WhatsApp account.

After three years of successive drops in circulation, the efforts of the newspaper industry to attract digital subscribers seemed to be paying off.⁹⁶ Overall daily print and digital subscriptions of the top ten paid-for papers rose 2.9% year-on-year – a 33% rise in digital subscriptions for those which have electronic editions. The increase was fuelled by heavy discount campaigns and by the extensive adoption of paywalls.

Overall trust in news, however, dipped 11 percentage points to 48% in comparison with last year’s survey, directly affected by an atmosphere of political polarisation. The environment of political confrontation brought partisan media to mainstream attention, as a significant number of voters were divided between the left-wing and the far-right candidates.



STATISTICS

Population	211m
Internet penetration	71%

The clash between candidates’ supporters escalated on social media, culminating in the publication by *Folha de S. Paulo*, one of the country’s leading newspapers, of a story accusing Brazilian businessmen of illegally financing a large-scale campaign to bombard WhatsApp users with hundreds of millions of messages attacking the left-wing candidate Fernando Haddad. The day after the story ran, WhatsApp announced that it had in the preceding weeks banned more than 100,000 accounts in an effort to contain misinformation and spam.

Brazilians remain some of the heaviest users of social media in the world and usage of all the top social and messaging brands has gone up significantly again over the last year. Growth was particularly strong among Instagram (+10), WhatsApp (+5), and YouTube (+8) users. Throughout the presidential campaign (and after it), Bolsonaro’s frequent tweets and Facebook Live appearances forced a change in traditional media coverage, as journalists had to keep a constant watch not only over the president’s social media accounts but also on those of his allies. Before taking office, the Brazilian president announced 14 of his 22 ministers through Twitter.

Though Bolsonaro had stated his commitment to freedom of the press in the weeks prior to the second round, his relationship with the media, both as candidate and president, has been fractious, at best. In an audio message leaked to the media in February 2018, he referred to the largest media conglomerate in the country, Grupo

Globo, as an enemy. The following month, Bolsonaro shared in his Twitter account accusations that were proven to be false against a reporter from *O Estado de S. Paulo*, one of the main newspapers.⁹⁷

Data from the first half of 2018 showed a concentration of advertising spending on free-to-air TV and online,⁹⁸ which – combined with the slow recovery of the Brazilian economy – contributed to the closing of long-established print titles. The 114-year-old regional newspaper *A Cidade*, published in São Paulo state, also closed its print version. Founded in 1891, the daily *Jornal do Brasil* revived its print edition in 2018. But, after a little over a year, the company announced that its content would again only be available online.

Rodrigo Carro

Financial journalist and former Reuters Institute Journalist Fellow

⁹⁵ Non-governmental organisation SaferNet Brasil.

⁹⁶ Top 10 best-selling dailies, according to Instituto Verificador de Comunicação (IVC Brasil).

⁹⁷ www.theguardian.com/world/2019/mar/11/bolsonaro-brazil-fake-news-journalist-media-attack

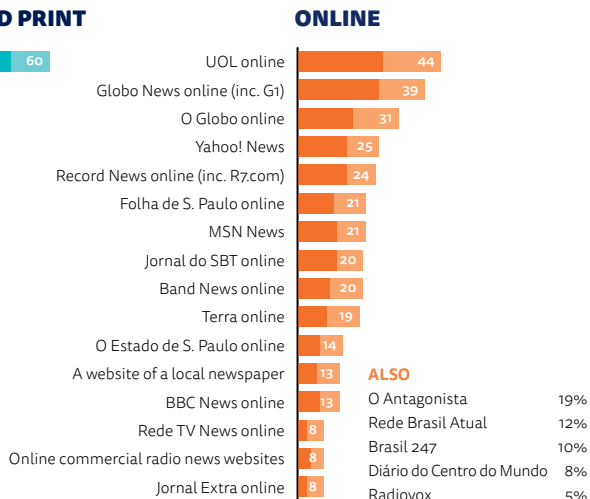
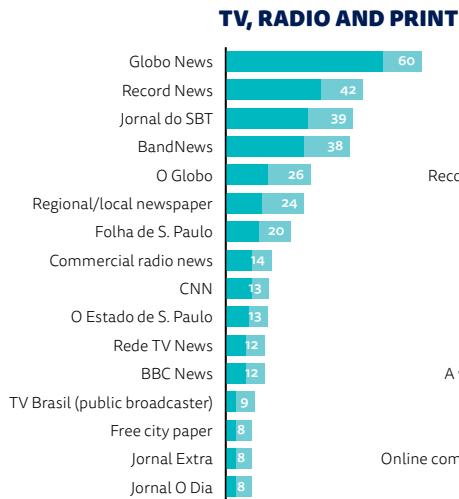
⁹⁸ Conselho Executivo de Normas-Padrão (CENP).

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

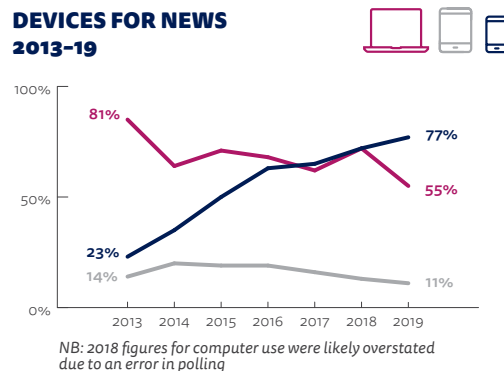
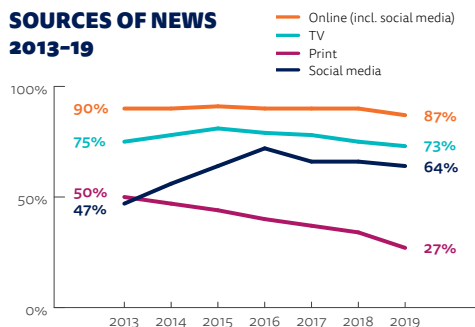
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



CHANGING MEDIA

Online and television remain the most important source of news in Brazil while print readership has almost halved since 2013. Meanwhile smartphones not only overtook computers as the primary means of accessing online news, they also established a wide lead.



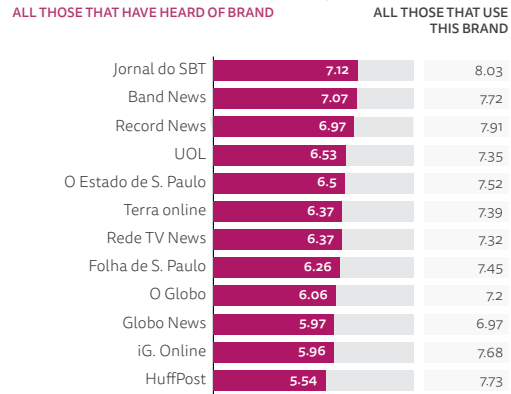
TRUST

Trust has fallen 11 percentage points in the last year after a difficult and polarising election. Brazilians have the highest level of concern about misinformation and disinformation in our survey and high use of social media facilitated the spread of inaccurate information during the election.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



22%
pay for **ONLINE NEWS**

51%
listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	54% (+2)	76%
2	WhatsApp	53% (+5)	84%
3	YouTube	42% (+8)	80%
4	Instagram	26% (+10)	54%
5	Facebook Messenger	15% (+5)	44%
6	Twitter	15% (+1)	28%

58%
SHARE NEWS
via social, messaging or email

36%
COMMENT ON NEWS
via social or website

CANADA

The Canadian government announced a major package of support for news organisations producing public interest journalism – one of the most extensive in the world. This amid widespread fears that local newspapers in particular are struggling to fulfil their democratic function.

The past decade has been especially hard for local newspapers in Canada. Hundreds of local news outlets – most of them community newspapers – have closed, though this has been somewhat offset by launches of new local operations. Research shows that depth of reporting about civic affairs declined sharply in small and mid-sized Canadian communities between 2008 and 2017, leaving citizens less informed about their democratic institutions.⁹⁹

Advertising revenues in 2016/17 fell most sharply for newspapers (-20.4%) and magazines (-28%), -8% for media overall.¹⁰⁰ Many media groups made significant layoffs, including the Postmedia group, owner of the largest newspaper chain in Canada; Vice Canada; Rogers; Huffington Post; Canadian Press; and Star Metro, a group of free dailies owned by Torstar and Metro International. The new ownership of *Métro Montréal* appears to be off to a rocky start, with a series of resignations, including several newsroom managers. Also in Montreal, *Voir* ended publication of its monthly print magazine, launched in 2016.

Rogers, once Canada's biggest print magazine publisher, sold its remaining publications including *Maclean's* (news) and *Chatelaine* (women, general interest), to St Joseph Communications. Torstar acquired iPolitics, a digital news source focusing on Canadian politics. New media initiatives include the Logic, a subscription-based digital news source focusing on the innovation economy, and QUB, an online French-language radio service from Québec.

National newspapers the *Globe and Mail* and *Le Devoir* continue to focus on paid online



content, especially subscriptions. The *Toronto Star* and the SaltWire Network, a chain of 35 newspapers in Atlantic Canada, launched metered paywalls for online content. Ownership of La Presse, now entirely digital and centred on its free tablet app, has been transferred to a non-profit structure.

In its 2019 budget, the Canadian federal government outlined criteria for qualifying journalism organisations that will benefit from non-profit status and refundable tax credits on labour costs. Canadians with digital subscriptions to qualifying Canadian news outlets will also be eligible for an annual tax credit until 2025. The government initiatives, which won't come into effect until 2020, raised concerns in the journalism community about transparency, as well as comment about the types of media that would be excluded (i.e. broadcasters, specialised outlets, small local publications with a single journalist).

Agence France-Presse became the Canadian partner of Facebook's third-party fact-checking programme, with a journalist dedicated to rating accuracy of news stories circulating on the social media platform. After ending its joint venture with Rogers, Vice Canada entered a broadcast agreement with Bell Media.

Several industry-based initiatives were launched to foster news literacy, digital citizenship, and 'counter-disinformation', with new projects focusing on local news (Facebook) and underserved communities (The Discourse/Public Policy Forum) and teens (CIVIX). Partisan news sites such as Rebel Media and National Observer still have limited reach in Canada.

STATISTICS

Population	37m
Internet penetration	90%

Podcasts are as popular in English Canada as in the US, but much less among Francophones. One in three Canadians listen to podcasts and are highly engaged with this format, averaging five podcasts a week.¹⁰¹ Facebook, and increasingly Facebook Messenger, are used more as vehicles for news consumption by French-speaking Canadians than English speakers, who in turn are more keen on Twitter.

Attacks on media and journalists from right-wing politicians seem to mirror those of Donald Trump. They are coming from Ontario Premier Doug Ford, who uses his 'Ford Nation TV' on YouTube to connect directly with voters, and from Maxime Bernier, a former Conservative minister who launched a new federal party with a populist platform.

Oil pipelines, immigration, and – especially in Quebec – religion continue to be polarising issues, and concern regarding disinformation is on the rise. However, trust in traditional and online media remains higher in Canada than in the US.

In early February, the *Globe and Mail* published allegations of political interference in criminal proceedings against SNC-Lavalin, an engineering firm. This led to the resignation of two cabinet ministers, the Prime Minister's closest adviser and the Clerk of the Privy Council, the top federal civil servant. Although early polls suggest the scandal has been damaging to the governing Liberal party, it remains to be seen whether trust in media will be affected as a result of this heavily covered story.

Colette Brin

Centre d'études sur les médias, Université Laval

⁹⁹ A. Lindgren et al., *Local News Map*, www.localnewsresearchproject.ca/wp-content/uploads/2019/02/LocalNewsMapDataasofFebruary12019.pdf; Public Policy Forum (2018), *Mind the Gaps*, www.pppforum.ca/publications/mind-the-gaps/?sf_data=all&sf_paged=5

¹⁰⁰ Compiled by ThinkTV for 2016–17, based on data from Statistics Canada, Television Bureau, IAB Canada, and the Canadian Radio-television and Telecommunications Commission.

¹⁰¹ GlobalWebIndex Q3-Q4 2018; Edison Research, *The Infinite Dial* Canada 2018.

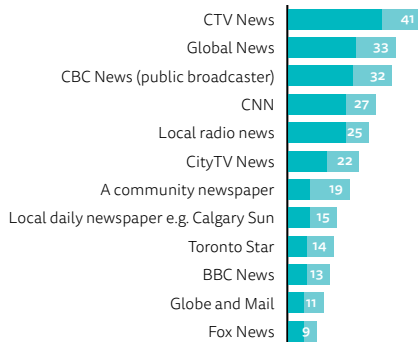
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

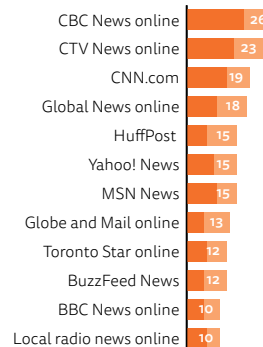
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

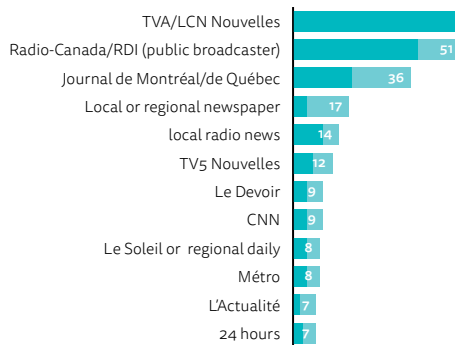
TV, RADIO AND PRINT (ENGLISH)



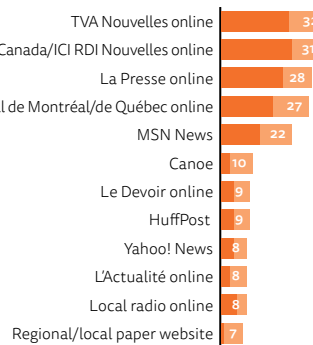
ONLINE (ENGLISH)



TV, RADIO AND PRINT (FRENCH)



ONLINE (FRENCH)

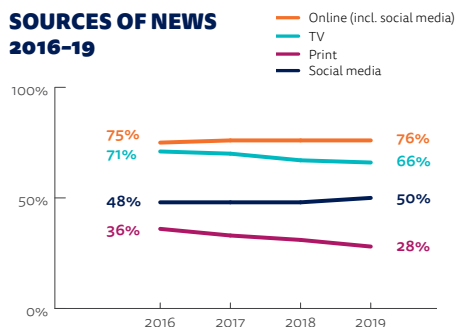


9% pay for **ONLINE NEWS**

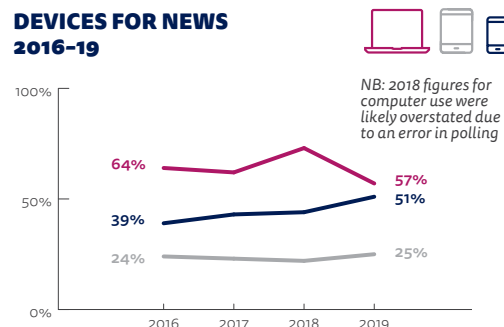
English 9%
French 8%

29% listen to **PODCASTS** in the last month

SOURCES OF NEWS 2016-19



DEVICES FOR NEWS 2016-19



TRUST

Trust in media declined in Canada this year, returning to 2017 levels. The shift is most perceptible among respondents under 35 and Francophones, who previously had higher trust in media than Anglophones.

DIFFERENT TYPES OF TRUST

News overall	News I use	News in search	News in social
52% (-6) 5th/38	59%	35%	20%
English 52% French 52%	English 59% French 61%	English 35% French 36%	English 20% French 19%

BRAND TRUST SCORES (0-10) (ENGLISH)

Brand	ALL THOSE THAT HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
CTV News	7.22	7.68
CBC News/Newsworld	7.21	7.78
Global News	7.17	7.6
CityTV News	6.97	7.67
Globe and Mail	6.96	7.52
The Canadian Press*	6.8	-
National Post	6.77	7.73
Maclean's	6.7	8.01
Toronto Star	6.64	7.42
Vancouver Sun	6.41	7.45
24 Hours	6.27	7.17
Metro	6.12	7.52
Huffpost	6.09	6.8
MSN News	6.07	7.08
The Rebel.media*	5.11	-

BRAND TRUST SCORES (0-10) (FRENCH)

Brand	ALL THOSE THAT HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
ICI Radio-Canada Info/ICI RDI	7.82	8.21
TVA Nouvelles/LCN	7.45	7.89
La Presse	7.44	8.09
Le Devoir	7.35	7.8
La Presse Canadienne*	7.29	-
TV5 Nouvelles	7.13	8.03
L'Actualité	7.03	7.3
CBC/Newsworld	6.98	7.7
CTV News	6.92	7.54
Journal de Montréal ou Québec	6.9	7.56
24 Heures	6.57	6.89
Canoe.ca	6.43	7.35
Métro	6.36	7.21
HuffPost	6.27	7.37
MSN News	6.18	6.81

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	40% (+2)	70%
2	YouTube	25% (+3)	65%
3	Facebook Messenger	12% (+2)	49%
4	Twitter	11% (-1)	24%
5	Instagram	8% (+2)	31%
6	WhatsApp	4% (-1)	16%

* Some brands do not have trust scores for users of those brands (did not meet minimum 50 threshold or did not specifically ask about the use of the brand)

CHILE

Public and private broadcasters, print and digital – all aspects of the media in Chile feel like they are facing a crisis, with layoffs, closures, and major restructuring. There is some innovation in the hunt for new audiences and revenues, but everyone is searching for a successful strategy.

Chile is a seismic country, and its news industry has been experiencing tectonic movements and a consequent shakedown. Whatever comes out of these movements, the landscape will be very different for producers and consumers alike. The public broadcaster Televisión Nacional (TVN), funded completely by advertising – and in tough competition with private rivals – faces particular problems because of low ratings and weak ad sales, which has led to newsroom and production layoffs. As a result, its board has changed, it has been hit by strikes, and has received a government cash injection of US\$47m to keep it on air. In addition, some senior executives had their pay cut. The broadcaster's president, Bruno Baranda, announced a multi-platform strategy in the hope of building audiences and making money.

TVN's cable news channel, 24 Horas, became the most viewed Chilean cable station, beating the local version of CNN. Although it's not as trusted as CNN, this has been matched with an increase of visitors to its website, making it the country's second most visited.

Chile has felt somewhat insulated from the rise of so-called 'fake news', and even this year the debate has seemed to focus on foreign and well-known cases elsewhere. The effect on confidence in the news in general has permeated local Chilean audiences with trust levels (45%) down 8 percentage points on last year.

Canal 13, a TV station formerly owned by Pontificia Universidad Católica de Chile but now a private enterprise, also had significant layoffs because of a revenue crisis. As part of cost-cutting measures, they outsourced audio-visual services,



such as camera operators, and also their long-form news stories which will now be made by independent production companies. Despite this, Canal 13's news bulletin is the second most viewed in the country, and they have pioneered the integration of their TV broadcast with their radio station and online platform, t13.cl.

The crisis has also affected the print industry. Copesa, owner of La Tercera, one of the two big Chilean newspaper companies, closed two of its most prestigious and award-winning paper magazines, *Paula* and *Qué Pasa*, with editors and journalists laid off. But the brands returned as online and social publications, produced by new teams and with a new focus on innovative digital products. Another example is an afternoon web newspaper called La Tercera PM which arrives as a newsletter; the company's radio stations have also strengthened their podcast distribution.

Emol is supposed to be an online version of *El Mercurio* newspaper, but it works with content produced by a separate newsroom which doesn't talk to the print newspaper. *El Mercurio*'s parallel gambit is to upload a digital facsimile edition to capture subscriptions through a recently launched paywall. The reading experience is similar to LUN, a tabloid which is third in the online list, and which has a high readership every year, despite being just a digital edition.

STATISTICS

Population	18m
Internet penetration	78%

Television remains the most important traditional news source in Chile, beating radio and newspapers. MEGA, the leading TV station, which is home to many of the most popular programmes and the most watched news broadcast, *AhoraNoticias*, has fared better in the economic crisis than the rest of the media. Bolstered by the robustness of its position, it opened a second television station – Mega Plus – for cable and terrestrial digital television, with news, documentaries, and lifestyle topics. It's integrated with its information radio station *Imagina* and incorporates visual versions of radio shows in the TV schedule.

Social media, especially Instagram, is mainly used as a way of drawing attention to content which is produced on other platforms. It is used more for advertising than for journalism, with content often condensed to help comprehension. There is little original material produced for these platforms, and there is limited interaction, though MEGA and Paula have made some attempts to do this. Live streams with user comments have been used by some publishers, with t13.cl (Canal 13) also operating a small team dedicated to working on mobile journalism and online video.

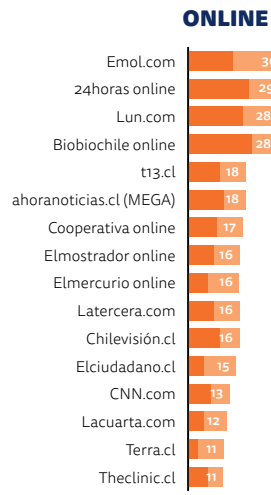
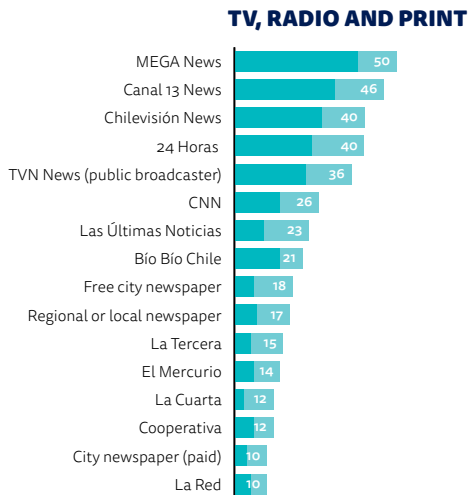
Francisco Javier Fernández Medina
and **Enrique Núñez-Mussa**
Pontificia Universidad Católica de Chile

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

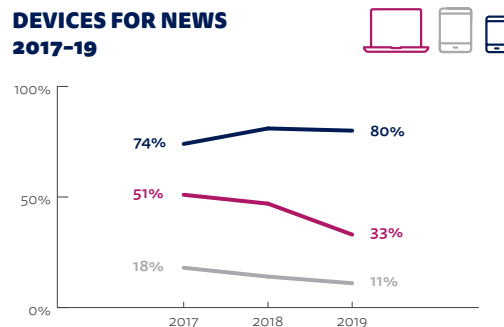
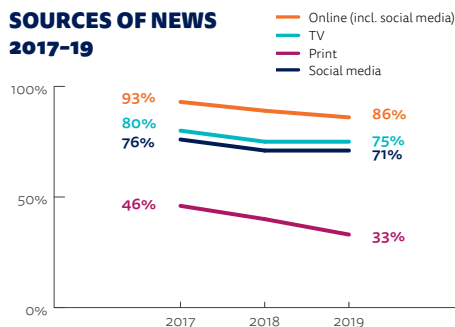
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



CHANGING MEDIA

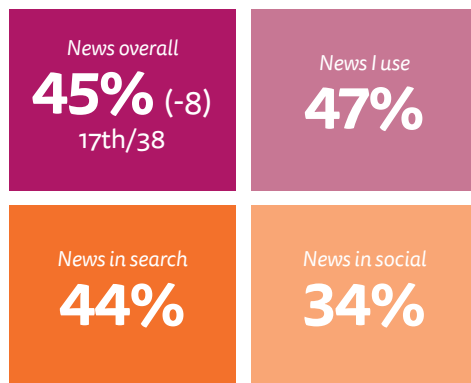
Online and social media are used by the vast majority for news each week, with both WhatsApp and YouTube becoming more influential and Facebook losing some ground. Smartphones have become the main way of accessing news (80%) in the last three years, with computers on the decline.



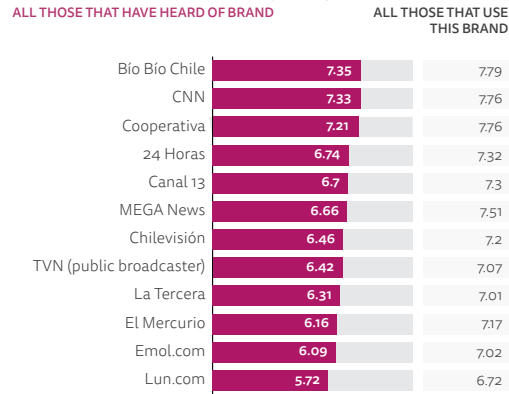
TRUST

Trust in the news has fallen substantially in the last year, but this may be more related to global rather than local trends. Journalism in Chile tends to be less polarised than many other countries in the region. Radio and TV brands top the list for audience-rated trust, with tabloid newspapers and online sites near the bottom.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



7% pay for **ONLINE NEWS**

38% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	64% (-4)	81%
2	WhatsApp	40% (+4)	81%
3	YouTube	31% (+4)	76%
4	Instagram	20% (+8)	48%
5	Twitter	16% (-2)	25%
6	Facebook Messenger	14% (+1)	45%

57% **SHARE NEWS** via social, messaging or email

37% **COMMENT ON NEWS** via social or website

MEXICO

There is a new political landscape in Mexico, with a popular president and new parties in government. The news industry, however, faces the threat of a 50% cut in government advertising, which could have significant implications for revenues.

The presidential elections and the triumph of Andrés Manuel López Obrador, leading a coalition called 'Juntos Haremos Historia' (Together we will make history) have changed the outlook for the Mexican media. It is the first time that a political coalition represented by parties other than the PRI (Party of the Institutional Revolution) and the PAN (National Action Party) has triumphed in Mexico. The new president had the majority of electoral votes and the coalition represents more than 60% of the seats in the Chamber of Deputies and 53% in the Senate.

The new political arrangements are having repercussions on the news media, which have become accustomed to having the government as their principal advertiser. Publishers have been told that 50% of the advertising spend by the federal government will disappear. This situation, combined with a generally weak economic environment for the news industry, caused some publishers, including Grupo Reforma, Grupo Milenio, Grupo Radio Centro, and Grupo Imagen, to make significant cuts to their workforce.

For those still in work, journalism remains a poorly paid and dangerous profession. Reporters face constant threats when covering issues such as political corruption and drug trafficking – murders, kidnappings, and other threats are not unusual.

Bots and trolls spreading false stories through social media is another hazard, in a country which has one of the highest uses of WhatsApp, Facebook, and YouTube in our survey. During the recent election, a number of journalistic organisations including AJ+, Animal Político and Pop Up Newsroom got together to counter the threat of misinformation with a project



STATISTICS

Population	131m
Internet penetration	65%

called Verificado which involved fact-checking and debunking of hundreds of false stories and memes.

Mexican society has changed both its news consumption and wider use of media as a result of digital platforms, social media, and smartphones. These changes in turn have contributed to the fragmentation and political polarisation of audiences, which also become huge challenges for media and advertisers.

Mexico's traditionally strong media outlets are still those generally chosen by the general public online. But at the same time, it's clear that publishers are segmenting their approach, targeting different socio-economic groups.

TV Azteca and Televisa continue to be the leading commercial TV companies, with their news programmes having the highest audiences. The newspaper *El Universal*, founded in 1916, leads the online news market, and is also second most popular among traditional media. The most popular digital-native news media are Aristegui Noticias, UnoTV, and Animal Político. They have different characteristics and strategies.

Aristegui Noticias is characterised by strong investigative reporting and a business model which focuses on content marketing and working with brands to distribute content. On the other hand, UnoTV has a high market penetration because of guaranteed digital distribution from its parent telecom company, America Móvil. Animal Político stands out because of its journalism model and revenue based on crowdfunding.

The 11 titles that appear in traditional high-consumption media also offer their content on attractive, shareable digital platforms. Video predominates everywhere along with some audio. Grupo Televisa is unique in offering all its news programmes via Alexa, Google Assistant, Siri, and Apple TV. Grupo Reforma and *El Economista* are the only publishers that use paid subscriptions for their digital products.

Some publishers have made strategic alliances with international media. For example, Grupo Milenio includes content from the *Financial Times*, and Grupo Reforma does the same with the *New York Times*.

Religious institutions, universities, and the media are the three most trusted institutions in Mexico in the past decade – this stands in sharp contrast to the level of trust people have in politicians. However, the triumph of the new president has restored some credibility and news brands that have an affinity with his ideology such as Aristegui Noticias may also benefit from higher trust levels in our survey this year. On the other hand, the lower rating for Televisa may be because of links with the various groups which previously had political and economic power – these have been strongly criticised by Andrés Manuel López Obrador and Aristegui Noticias.

María Elena Gutiérrez Rentería
Universidad Panamericana

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

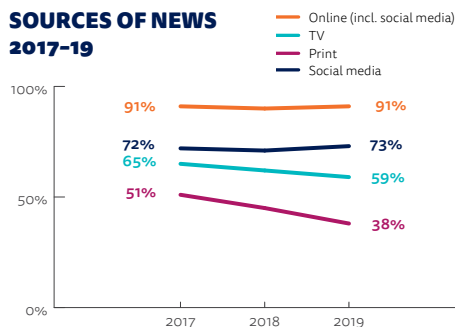
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



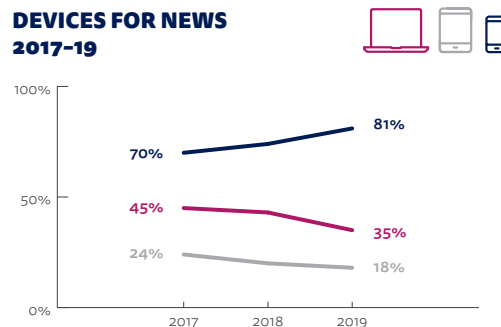
CHANGING MEDIA

Online and social media remain the most popular sources of news in Mexico with our predominantly urban sample. TV and radio remain important to reach the millions of people who are not online. The majority of internet news access is now via smartphones (81%) rather than computers or tablets.

SOURCES OF NEWS 2017-19



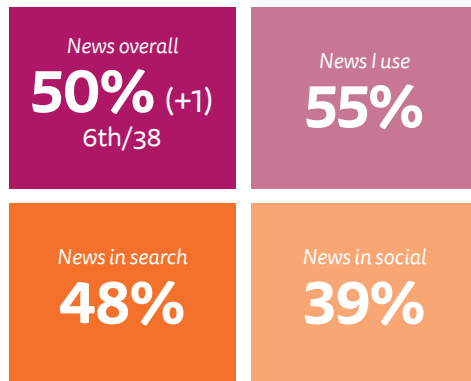
DEVICES FOR NEWS 2017-19



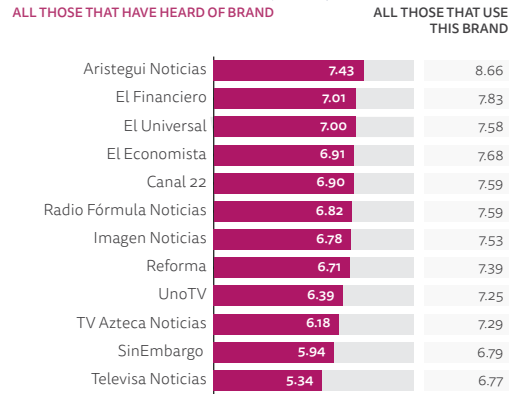
TRUST

The media have traditionally enjoyed relatively high levels of trust in Mexico along with religious institutions and universities. Television is often the most popular medium with both audiences and advertisers, but, unusually in our survey, newspaper brands often score better in terms of trust, along with some digital-born brands.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



16%
pay for **ONLINE NEWS**

57%
listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	67% (+6)	86%
2	YouTube	42% (+5)	83%
3	WhatsApp	41% (+6)	84%
4	Twitter	23% (-)	40%
5	Facebook Messenger	19% (+4)	62%
6	Instagram	15% (+7)	46%

64%
SHARE NEWS
via social, messaging or email

43%
COMMENT ON NEWS
via social or website



Section 3

Analysis by Country

Asia Pacific

Asia Pacific		
3.31	Australia	132
3.32	Hong Kong	134
3.33	Japan	136
3.34	Malaysia	138
3.35	Singapore	140
3.36	South Korea	142
3.37	Taiwan	144

AUSTRALIA

The Australian media landscape has been through 12 months of upheaval marked by takeovers, closures, job losses, and a leadership crisis at the national public broadcaster. Amidst the gloom, a philanthropist bearing \$100m emerged offering hope.

Media ownership in Australia contracted further at the end of 2018, when the broadcaster Nine Entertainment Co. took over Fairfax newspapers. Under the deal, Nine promised the flagship mastheads of the *Sydney Morning Herald*, the *Age*, and the *Australian Financial Review* would remain editorially independent. So far, 92 jobs have been lost. Nine has since sold the Fairfax stable of more than 160 regional papers, including the *Newcastle Herald*, the *Illawarra Mercury*, the *Canberra Times*, the *Land* and the *Examiner*, to a former Domain CEO, Antony Catalano. Global job shedding by Vice and BuzzFeed were also felt in Australia and NewsCorp has let go more than 60 staff in the past year.

Politically, internal federal government infighting resulted in a change of Prime Minister and subsequent resignations of female MPs over claims of bullying and sexism. The leadership instability in federal politics was echoed at the helm of the public broadcaster when the Managing Director of the Australian Broadcasting Corporation, Michelle Guthrie, was sacked by the board without notice. The Chair, Justin Milne, resigned not long after amid allegations he had called for the sacking of journalists who were unpopular with the government, and thereby had undermined the editorial independence of the ABC. This sparked a Senate Inquiry into political interference in the ABC. To restore calm, the Prime Minister appointed an icon of Australian media, Ita Buttrose, to chair the public broadcaster and win back the trust of staff and the Australian public. In good news for the public service broadcasters, an inquiry rejected complaints that the ABC and the SBS were undermining the commercial news sector and found that Google and Facebook were a bigger threat to competition. In other broadcasting



news, the 24-hour subscription channel, Sky News, is attempting to broaden its audience by screening on the free-to-air television channel, WIN.

Just how to deal with the impact of Google and Facebook on the news and advertising industries is the subject of an ongoing inquiry by the Australian Consumer Competition Commission. Preliminary recommendations include tighter monitoring and regulation of the way platforms use news, and greater transparency about the use of consumer data. A range of tax incentives and subsidies are also being considered to improve the financial footing of journalism. The media industry is keenly awaiting the final report to government which is expected at the end of June 2019. In the wake of the terrorist massacre in Christchurch, New Zealand, the parliament passed new laws cracking down on social media platforms if they host violent extremist content.

Journalism standards have also made headlines. BuzzFeed found itself at the centre of a costly defamation case for allegedly 'slut shaming' a federal MP. A further 36 journalists and news were summoned to appear before the court for their reporting of the conviction of Cardinal George Pell on historic child sex abuse charges. A suppression order prevented the reporting of the conviction until a second related case had been resolved. The Victorian Director of Public Prosecutions sent letters to 100 journalists, editors, and news outlets for breaching suppression laws and alleged contempt of court.

STATISTICS

Population	25m
Internet penetration	88%

Amid the job losses, takeovers, and instability, there have been some positive developments as well. The federal government began rolling out its regional innovation funding for local news initiatives, including scholarships for 60 young people from regional areas to study journalism at university. Before Christmas, a \$100m philanthropic body, the Judith Neilson Institute for Journalism and Ideas, was established to champion, foster, and fund journalism initiatives and improve public discourse. Independent media brand Crikey also launched a new 'inquiry' journalism initiative employing 12 investigative reporters. These initiatives have provided glimmers of hope in a time of uncertainty and contraction.

Podcasts continue to be popular in Australia, particularly amongst the under 35s (43%). The highest award for journalism excellence, the Gold Walkley Award, went to Hedley Thomas from *The Australian* newspaper for an investigative podcast series called 'The Teacher's Pet' about an unsolved murder. It had a global audience of more than 27m listeners. For a traditional newspaper journalist to win for a piece of audio journalism marks the massive transformation of the news industry away from single to multiplatform reporting.

Caroline Fisher

News and Media Research Centre,
University of Canberra

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

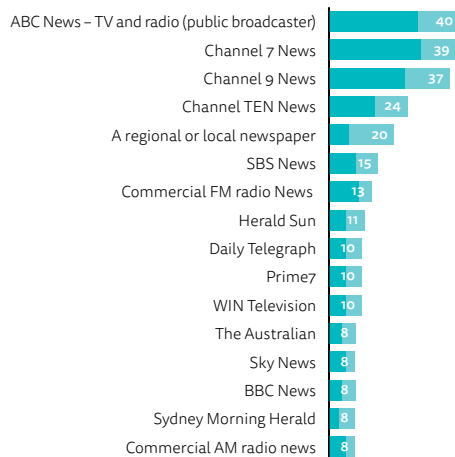
CHANGING MEDIA

TV news remains strong and steady in Australia and continues to be a significant source of news, while newspapers continue to fall, and social media stagnates. Online, increasing numbers of Australians are using their mobile phone to access news, widening the gap between mobiles and computers.

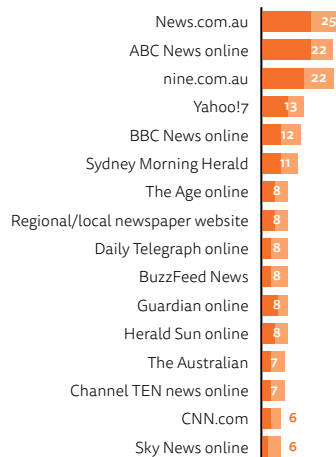
TRUST

Trust in news has fallen 2% globally, but in Australia it has dropped 6% from a high of 50% in 2018. Turmoil at the ABC with accusations of political interference, combined with community concern about the takeover of the Fairfax newspaper stable by Nine Entertainment Co. and overall political instability, may have contributed to this fall in trust in news. Other data shows trust in politics down in 2018.¹⁰²

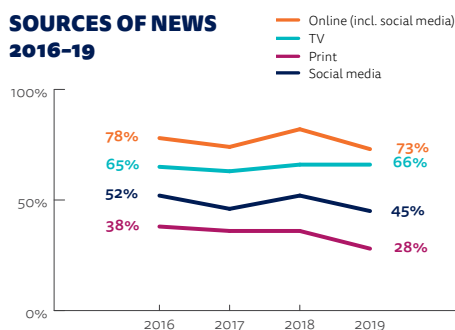
TV, RADIO AND PRINT



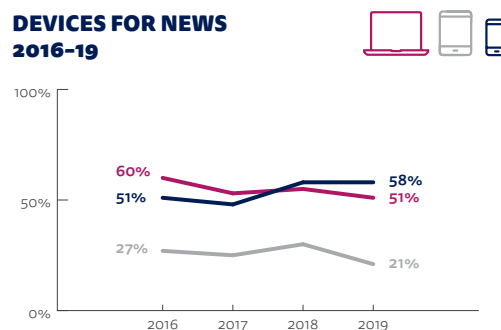
ONLINE



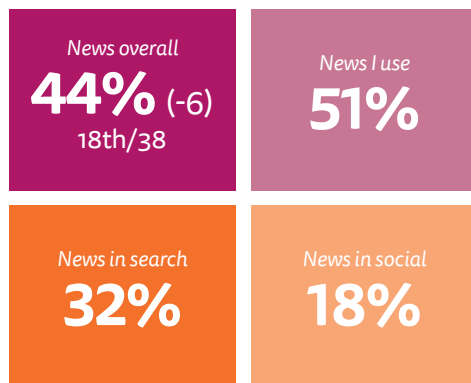
SOURCES OF NEWS 2016-19



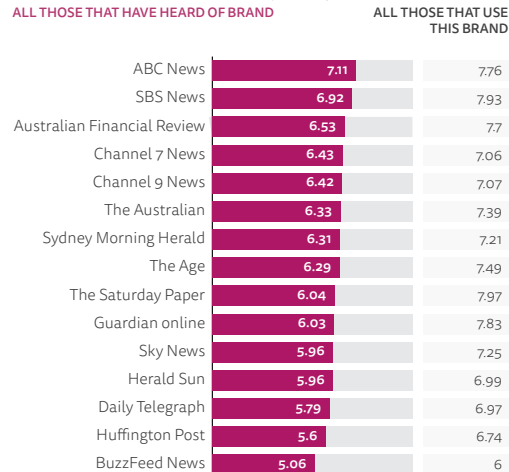
DEVICES FOR NEWS 2016-19



DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



14% pay for **ONLINE NEWS**

27% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	36% (-5)	70%
2	YouTube	19% (-1)	60%
3	Facebook Messenger	10% (-1)	49%
4	Twitter	9% (+1)	17%
5	Instagram	7% (-2)	30%
6	WhatsApp	6% (-4)	21%

27% **SHARE NEWS** via social, messaging or email

19% **COMMENT ON NEWS** via social or website

HONG KONG

The rejection of a *Financial Times* journalist's visa renewal application has highlighted continued concerns over press freedom in Hong Kong. Meanwhile, a critical government department report on Hong Kong's only public broadcaster has raised questions about the organisation's role and resources amid declining audiences.

The commercial broadcaster TVB continues to dominate free TV and online news. Its efforts to deliver cross-platform media content have been strengthened by the success and profitability of its over-the-top (OTT) streaming service, which reaches half of all households in Hong Kong through its set-top box, mobile app, and online portal. Indeed, the percentage of households owning a set-top TV box has increased from 16% to 43%.¹⁰³ Sensing this trend and opportunity, pay TV broadcaster i-Cable, which has accumulated losses of more than US\$250m in the past decade, has announced plans to offer its own OTT service even though it lacks a substantive online brand presence.

The success of TVB's OTT business has not prevented the laying off of more than 200 staff, 5% of its workforce, due to continuing challenges for legacy media with falling advertising revenues. Online media have not been spared these difficulties as even HK01.com, which was established in 2016 and has since become a popular online news brand as indicated by this survey, has laid off 70 staff as part of its restructuring. Popular news brand Apple Daily plans to make readers register for its online edition, and there is speculation that this is a precursor to eventually introducing a paywall for its content.

Political influence in Hong Kong's media came under international scrutiny when *Financial Times* journalist Victor Mallet's visa renewal application was denied by the immigration department without explanation. Most observers attributed this to Mallet's role as the first vice-president of the Foreign Correspondent's



STATISTICS

Population	7.4m
Internet penetration	87%

Club (FCC) and his chairing of a talk in August 2018 by a fringe political party convener who openly advocates Hong Kong's independence from China. Indeed, when the event was announced the FCC was criticised by both pro-government politicians and the media for providing a public platform for the calling for Hong Kong independence. Representatives from the Office of the Commissioner of the Ministry of Foreign Affairs of China also sent representatives to dissuade the club from hosting the event, but it eventually went ahead as scheduled.

No reason for the visa denial was given by the immigration department despite requests from the FCC, the *Financial Times*, and the British government for an explanation. A proposal by pro-democracy lawmakers to summon immigration officials to explain the denial was rejected by pro-government lawmakers who comprise the majority in the legislature.

One notable aspect of the visa denial case was that the news of Chinese government representatives visiting the FCC was broken by the crowdfunded English-language online newspaper Hong Kong Free Press. Founded in 2015 to provide independent news, it has been quite successful in sustaining its operations through public donations, which rose from over US\$130,000 in 2016 to US\$220,000 in 2017. Despite its early success and inclusion in this survey's brand list, it does not reach a wide audience (3%), reflecting how English-language news has a very small market in Hong Kong and is still dominated by global brands like the BBC and CNN.

As the only public broadcaster directly funded by the government, Radio Television Hong Kong's (RTHK) role has been subject to much debate, especially in terms of its editorial independence and ability to fulfil its social obligations. This was exemplified by the controversial FCC talk when management banned news staff from live-streaming the speech because it was likely to advocate Hong Kong independence. The additional task of operating three new TV channels since 2014, along with seven radio channels, has created extra burdens for the broadcaster to generate enough media content. A government audit in 2018 criticised the broadcaster for its lack of original TV programming and repeatedly rerunning the same programmes to fill time.

Despite these challenges, RTHK remains a popular brand for news and ranks the highest in terms of brand trust. Most of its radio and TV podcasts are readily accessible online and through its seven mobile apps, which contributes to the overall popularity of podcasts in Hong Kong.

**Michael Chan, Francis Lee,
and Hsuan-Ting Chen**
Chinese University of Hong Kong

¹⁰³ www.nielsen.com/hk/en/insights/news/2018/nielsen-media-index-take-up-of-mobile-first.html

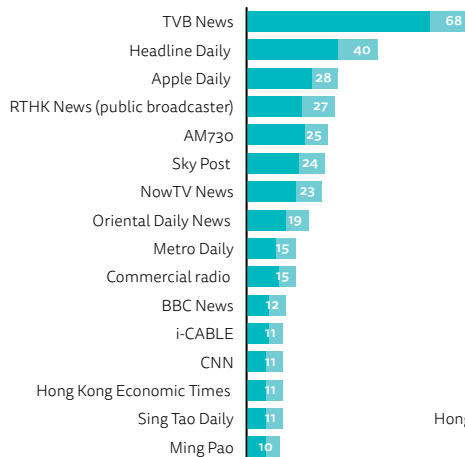
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

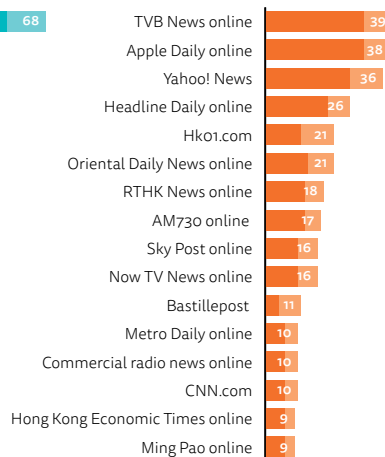
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



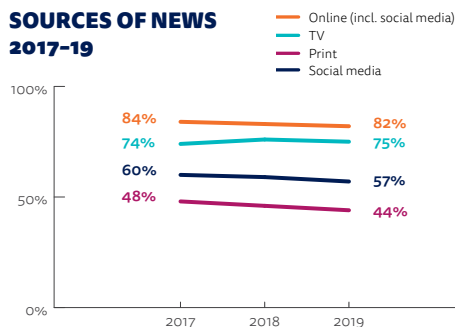
ONLINE



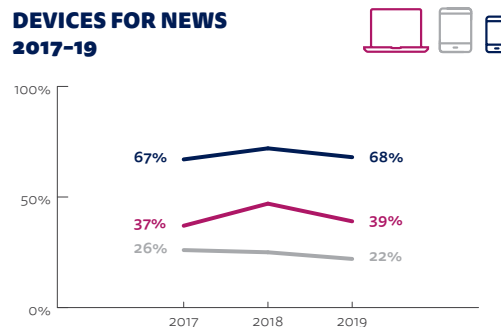
CHANGING MEDIA

Consumption habits have changed little over the last few years with television and online remaining main sources of news. The use of social media is slightly down in the last year – mainly due to declines in Facebook usage – while WhatsApp and Instagram continue to grow.

SOURCES OF NEWS 2017-19



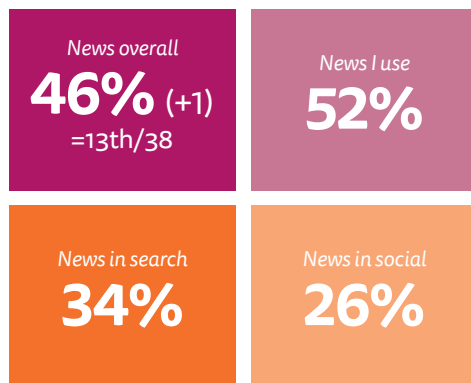
DEVICES FOR NEWS 2017-19



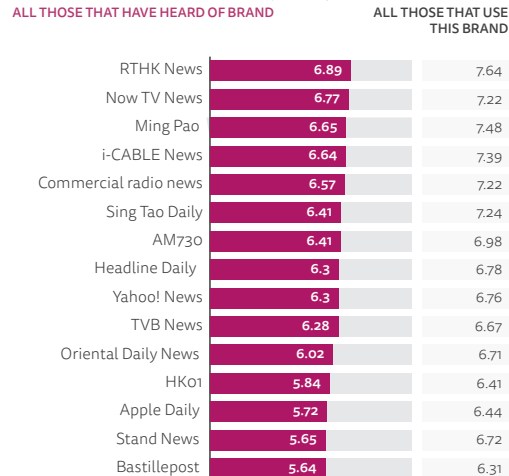
TRUST

Hong Kong online news consumers trusted the news they personally used much more than the news derived from online search and available through social media. Compared to last year, overall trust in news and trust in 'news I use' remain largely the same, along with trust in search and social media.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



17%
pay for
ONLINE NEWS

53%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	52% (-4)	81%
2	WhatsApp	41% (+3)	85%
3	YouTube	33% (-2)	73%
4	WeChat	16% (+1)	54%
5	Instagram	13% (+4)	42%
6	Facebook Messenger	10% (+2)	39%

51%
SHARE NEWS
via social, messaging or email

23%
COMMENT ON NEWS
via social or website

JAPAN

The media landscape in Japan has long been characterised by strong newspapers with large circulations, along with five country-wide networks of television including the licence fee-funded public broadcaster NHK. However, with traditional readership falling, publishers are exploring ways of embracing digital.

Led by the *Yomiuri Shimbun* newspaper, which sells 8.1m, and *Asahi Shimbun*, 5.6m, daily newspapers are still enormously influential in Japanese society. However, as in the rest of the world, circulations are decreasing fast. Total newspaper circulation in October 2018 was 39.9m or 0.7 copies per household, down 5.29%, or 2.23m copies, from the previous year – a record fall.

The shift to digital is slower than in many other countries because there is so much print revenue to protect. Despite this, *Nikkei* (Japan Economic Daily) has accelerated its 'digital first' strategy following its purchase of the *Financial Times*, reaching 650,000 paid subscribers. *Nikkei* has started to publish stories first online, before sending them for print, a practice hitherto unheard-of in Japan. In another sign of digital change, *Nikkei* has started to signal exclusive stories on Twitter, for example, an hour before publishing an interview online with jailed former Nissan Co. chairman, Carlos Ghosn.

As part of its digital renewal, the *Asahi Shimbun* has launched seven new online-only media brands, each of which covers subjects ranging from world affairs to millennial women's lifestyle to college sports. However, perhaps the most remarkable move is that the *Yomiuri Shimbun* finally announced the relaunch of its digital service Yomiuri Online. It has been extremely wary of cannibalising print revenues, but is now offering subscribers an extensive digital product. However, *Yomiuri* still doesn't offer digital-only subscriptions – access remains bundled with print.



STATISTICS

Population	127m
Internet penetration	93%

One unusual aspect of the Japanese online landscape is the dominant presence of Yahoo! News, which became popular as Japan's primary portal website in early 2000s and has maintained that presence ever since. It aggregates news stories from a range of news providers in return for a share of advertising revenue and reaches almost half of our sample (48%) more than three times a week and over half (54%) in total. Yahoo still uses humans rather than algorithms to select the eight top stories on the site – seeking to balance different viewpoints and genres such as politics, crime, science, world news, sports, and celebrity. It also provides original in-depth stories, as well as articles commissioned from independent journalists and commentators.

Other popular news aggregators include Line News (19% weekly reach) which is part of Japan's most popular social platform. The Line platform reaches around 79m Japanese users and combines professional news with social and chat functionality. It has also been used by investigative journalists to source important news stories. The *Nishinippon Shimbun* newspaper, a daily published in the Kyushu region, runs a successful 'Investigation Team', which uses Line as its main tipline from readers. The paper has found the platform a good way to engage young people; among the paper's 4,700 Line Friends (contacts), there are 100 teenagers. This approach resulted, for example, in a compelling story about students' complaints about the difficulties of the school curriculum.

Fact-checking has increased with more players joining. In a hard-fought Okinawa prefectural governor's election in September 2018, many rumours and statements online were fact-checked and found to be false or misleading. Among the fact-checkers were two local newspapers and Factcheck Initiative Japan, which is a coalition of journalists and academics. Meanwhile BuzzFeed Japan and NHK recently investigated anonymous viral websites and uncovered details of how they operated.

Anonymous viral sites' stories were on occasion more widely shared and spread than stories from traditional media, BuzzFeed Japan found. The inclination towards anonymity in Japan affects people's choice of social network. Japan is a rare country where Facebook is not the number one social network; YouTube and Twitter are both far larger. They are widely used by people to express themselves anonymously, while Facebook enforces rules around using real names.

Public broadcaster NHK recruited a rookie female news presenter Yomiko – a computer-generated character driven by artificial intelligence. Looking to appeal to a younger generation, Yomiko uses machine-learning to correct her pronunciation of thousands of Kanji (Chinese characters used in the Japanese language). She has also been composing Senryu, or Japanese short poems similar to Haiku, about the latest news stories to make journalism more fun.

Yasuomi Sawa

Journalist, *Kyodo News* and former Reuters Institute Journalist Fellow

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

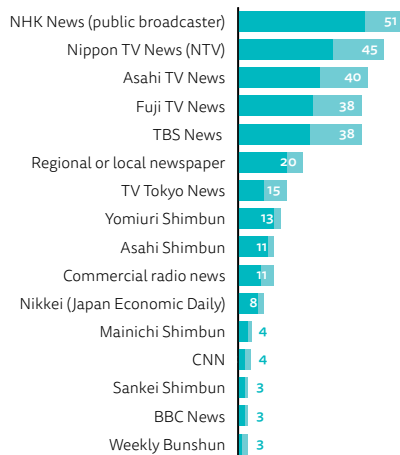
CHANGING MEDIA

Television news remains the most important source of news in Japan, while print has declined significantly over the last six years. Japanese engage with online news primarily through aggregators like Yahoo! News, tend to use social networks less, and have taken longer to fully embrace smartphones.

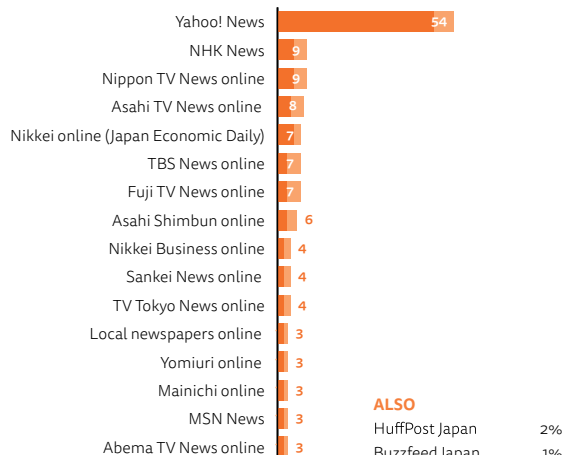
TRUST

There has been widespread discussion of the issue of low trust in the media including an NHK drama *Fake News* and more fact-checking services. Public broadcaster NHK remains the most trusted news brand while popular magazines (*Weekly Shincho*, *Weekly Bunshun*) have a reputation more for gossip and sensationalism than serious reporting, although they often succeed in exposing misdeeds of the rich and powerful.

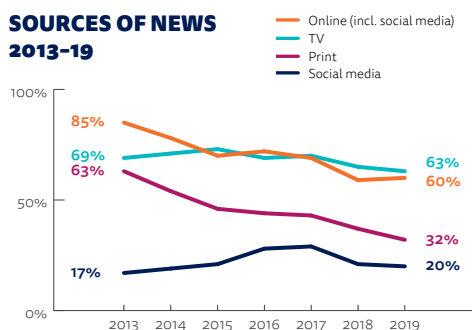
TV, RADIO AND PRINT



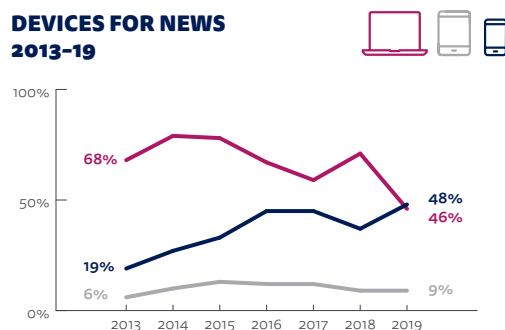
ONLINE



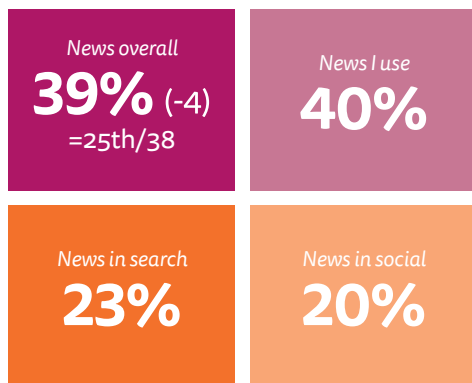
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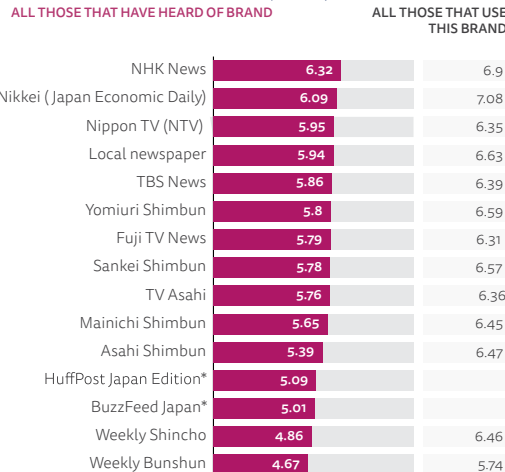
DEVICES FOR NEWS 2013-19



DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



* No figures for users of HuffPost Japan Edition or BuzzFeed Japan (did not meet 50 minimum threshold)

7% pay for ONLINE NEWS

23% listen to PODCASTS in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	YouTube	16% (-3)	50%
2	Line	14% (+5)	38%
3	Twitter	10% (-2)	25%
4	Facebook	5% (-4)	19%
5	Niconico	2% (-2)	10%
6	Instagram	2% (-)	15%

10% SHARE NEWS via social, messaging or email

6% COMMENT ON NEWS via social or website

MALAYSIA

Political upheaval in Malaysia after years of authoritarian rule led to high hopes of an extension to media freedom. A year on, the new government appears to be reluctant to carry out its promises.

In May 2018, a disparate coalition, Pakatan Harapan (PH), won a historic and unexpected general election over the Barisan Nasional (BN) coalition which had governed Malaysia for more than six decades. The first few months following the victory saw much euphoria and the welcoming of a 'New Malaysia'.

Almost a year on, much of that seems to have died down, with PH losing two state by-elections. For many, it has been a year of some election promises being kept but numerous others still needing to be fulfilled. Promises relating to media freedom and freedom of expression make up some of the more controversial ones. One of the first items on the new government's agenda was to repeal a hastily created Anti-Fake News Law, passed by the BN administration just before the May elections. The aim had been to punish bearers of critical information provided by web-based news portals and social media. But the repeal has been delayed for at least a year, after being rejected by the Malaysian parliament's upper house which is dominated by BN senators.

After a reported loss of MYR669m (approximately US\$172m) in 2017, Media Prima, the biggest Malaysian media conglomerate, returned to the black at the end of 2018 with a net profit of MYR68.2m, but only because of a 'one-off gain in selling property'.¹⁰⁴ Media Prima owns four free-to-air TV channels including TV3, Malaysia's number one station by audience share, and three national news brands including the *New Straits Times*, *Berita Harian*, and *Harian Metro*.

Another conglomerate, Utusan Malaysia (Utusan), owned by the once-dominant political party, UMNO (United Malays National Organisation), is going through uncertain times. In December 2018, its executive chairman and UMNO politician,



STATISTICS

Population	32m
Internet penetration	78%

Abdul Aziz Sheikh Fadzir, resigned, after having been at the helm for just six months. The company then began a round of layoffs. But then Abdul Aziz returned, buying up more than 30% of the company's shares. The uncertainty continues with the conglomerate's fortunes evidently being linked to how well UMNO does in by-elections and how far it distances itself from former prime minister Najib Razak.¹⁰⁵

The problems faced by Utusan are common to the press in Malaysia. Circulation for virtually all daily newspapers has been going down since even before the election. In August 2018, New Straits Times Press, the country's oldest publisher, announced it was selling its Kuala Lumpur headquarters and its printing plant. The *New Straits Times*, like other pro-BN media companies, has been experiencing dwindling circulation. Soon after the general election, there appeared to be hope for reform. Groups and individuals from Malaysian civil society banded together to call for – and offer assistance towards – reforms, including media reform. For example, proposals to develop Malaysia's state broadcaster, RTM (Radio Television Malaysia), into a genuine public broadcaster were submitted but there appears to be reluctance to adopt them.

Despite the talk, where the media is concerned, the government appears to be more keen on control and censorship than about developing a progressive policy. The sentencing of a Facebook user to ten years and ten months imprisonment for insulting Islam and the Prophet Muhammad seems to illustrate this.¹⁰⁶

Aggregator sites and social media are also on the rise as providers of information – if not specifically news. One of the causes is that many Malaysians continue to be reluctant to pay for online news – among our respondents 16% say they are paying. To paraphrase the founder of the *Malaysian Insight*, Jahabar Sadiq, Malaysian millennials willingly pay for lattes but not for news¹⁰⁷ – though it should be said that some news sites, like *Malaysiakini*, have built a significant base of subscribers (more than 24,000 by late 2018).¹⁰⁸

Zaharom Nain

University of Nottingham Malaysia

¹⁰⁴ www.theedgemarkets.com/article/media-prima-returns-black-fy18-gain-property-sale

¹⁰⁵ www.malaymail.com/news/malaysia/2019/02/08/utusan-no-longer-under-umnos-direct-control/1721079

¹⁰⁶ www.scmp.com/news/asia/southeast-asia/article/2189352/malaysian-jailed-more-10-years-insulting-islam-social-media

¹⁰⁷ www.mumbrella.asia/2018/02/malaysian-media-mogul-jahabar-sadiq-millennials-pay-for-lattes-so-why-not-news

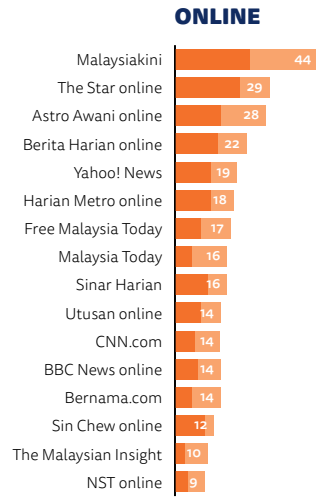
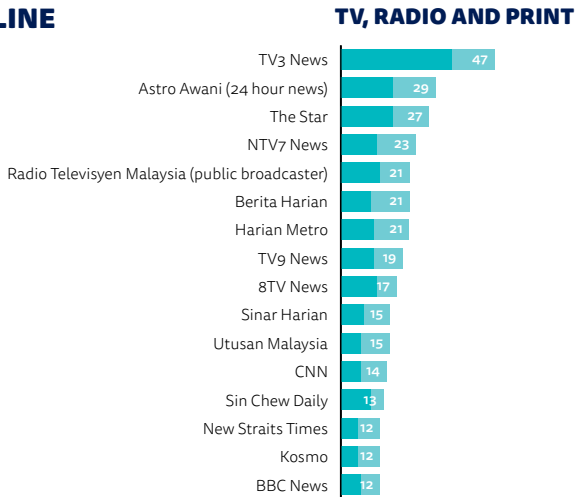
¹⁰⁸ www.events.wan-ifra.org/sites/default/files/field_ecm_file/73_malaysiakinis_digital_subscription_journey_sean_ho.pdf

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

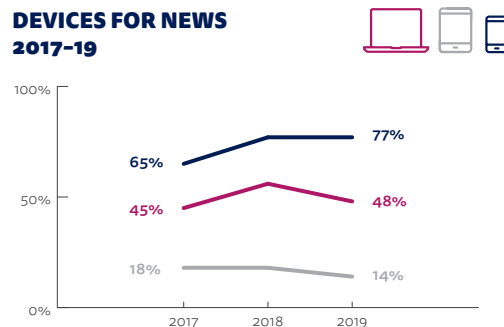
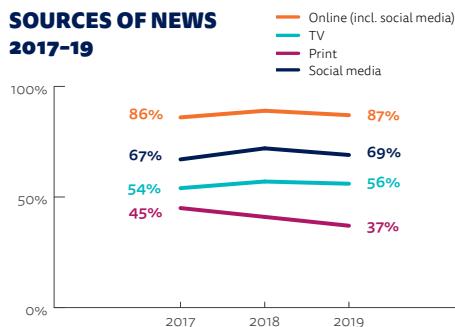
% Weekly usage

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- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



CHANGING MEDIA

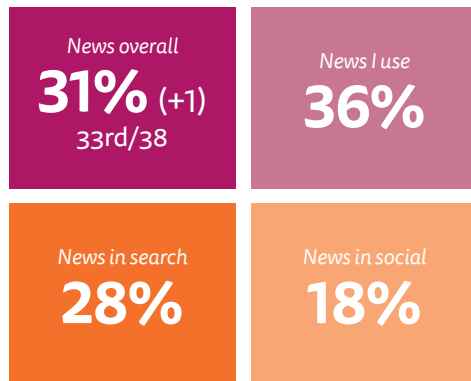
Online and social media remain the predominant sources of news for our online sample of Malaysian news users. TV and print continue to play an important role for those not online. Smartphones are the main access point for digital news with access from computers and tablets falling over time.



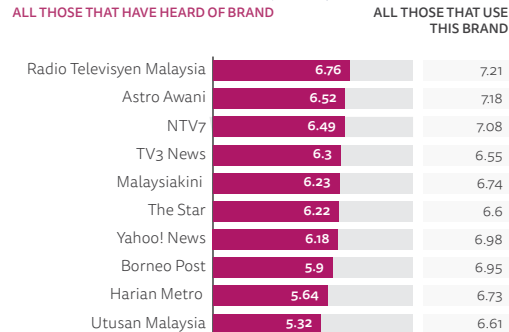
TRUST

In spite of the assurances of greater media freedom by the new government, and the impending launch of an industry-run and regulated Media Council, overall trust is similar to last year. 24-hour TV news channel Astro Awani leads in the area of brand trust taking a fresh, open, and even critical approach to discussing news and current affairs.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



16%
pay for **ONLINE NEWS**

42%
listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	60% (-4)	78%
2	WhatsApp	50% (-4)	80%
3	YouTube	32% (-1)	72%
4	Instagram	21% (+4)	48%
5	Twitter	14% (+1)	26%
6	Facebook Messenger	11% (-1)	37%

51%
SHARE NEWS
via social, messaging or email

28%
COMMENT ON NEWS
via social or website

SINGAPORE

Singapore is a strategic centre for the English-speaking audience in South East Asia and a media hub for the entire region, with a highly developed if tightly controlled media market. A new law to prohibit the spread of 'fake news' has attracted criticism over fears that it could limit freedom of speech.

In May 2019, the Singapore parliament passed a controversial law to limit the spread of 'fake news'. The Protection from Online Falsehoods and Manipulation Bill was the culmination of an extensive series of public hearings by a parliamentary select committee. Under this law, all government ministers will have the power to direct individuals, publishers, internet platforms, and mainstream media to publish corrections to a false statement if the executive deems the falsehood in question is a threat to the public interest.¹⁰⁹ The government says the law is necessary to protect Singaporeans from harmful content – in particular inciting racial and religious disharmony. But critics say the bill gives the government too much power, potentially threatening civil liberties.¹¹⁰

This law comes after online site States Times Review voluntarily closed down in November 2018 after being ordered by the Singapore government to take down an article it published that linked Prime Minister Lee Hsien Loong with the 1Malaysia Development Berhad (1MDB) corruption scandal. The Monetary Authority of Singapore (MAS) had said such insinuation was baseless and defamatory.¹¹¹ Mr Lee also filed a defamation suit against another blogger who had shared the article on Facebook.¹¹² STR founder Alex Tan, who operated the site while based in Australia, later announced that he was transferring control of the site to someone based in Canada. STR has since been renamed as Singapore Herald and can still be accessed in Singapore.



STATISTICS

Population	5.8m
Internet penetration	84%

If approved, the proposed 'fake news' law in Singapore will be in addition to regulation that already applies to local broadcast and online media outlets. Starting in 2013, the government introduced a new framework that required individual licensing for online news sites that publish regular articles on Singapore news and current affairs, and have large numbers of monthly visitors.¹¹³ Licensed sites are required to remove content that is in breach of content standards, such as pornographic, extremist, or racially insensitive content, within 24 hours and post a performance bond of SG\$50,000, similar to the bond requirement for television broadcasters.

Just two big media companies dominate the production of local news and in recent years have extended their dominance from traditional to online platforms. MediaCorp, owned by a state investment agency, operates all local television stations in Singapore. The website of its cable news network Channel News Asia is by far the most popular online news source, used by 46% in our survey.

Meanwhile Singapore Press Holdings (SPH), with close links to the ruling party, has a virtual monopoly on the newspaper industry and owns most local papers, including Chinese-language *Lianhe Zaobao*, Malay-language *Berita Harian*, and Tamil-language *Tamil Murasu*. Its English-language broadsheet, the *Straits Times*, is in second place in online news at 37%, down from 45% in 2018. Yahoo! News is the third most frequently used news site (30%).

However, digital media start-up mothership.sg inched its way to become the fourth most used news site in Singapore, from 23% in 2018 to 29% this year. Founded in 2014, mothership.sg is known for its bite-sized articles, many sourced from viral social media posts. The site claims to get an average of 9.2m visitors per month, some 60% of whom are between 25 and 44 years old.

Online media account for the bulk of news consumption in Singapore, as television and print continue to see sharp declines. TV was down 4 percentage points, to 51%, while print fell to 38%, down 5 percentage points from 2018 after a 10 point drop the year before. Digital news consumption appears to have stabilised in 2019 after years of rapid growth, with 86% saying they get news online each week and 62% via social media. Social media use for news decreased slightly for both Facebook and WhatsApp – platforms that have borne the brunt of blame for the spread of disinformation in Singapore – but increased for both YouTube and Instagram.

Edson C. Tandoc Jr.

Wee Kim Wee School of Communication and Information, Nanyang Technological University, Singapore

¹⁰⁹ www.todayonline.com/singapore/explainer-how-online-news-sites-can-be-compelled-correct-take-down-fake-news

¹¹⁰ www.nytimes.com/2019/04/01/world/asia/singapore-fake-news-law.html

¹¹¹ www.channelnewsasia.com/news/singapore/states-times-review-founder-says-will-shut-down-website-10914264

¹¹² www.mothership.sg/2018/12/leong-sze-hian-lee-hsien-loong-defamation/

¹¹³ www.gov.sg/factually/content/what-is-the-licensing-framework-for-online-news-sites-all-about

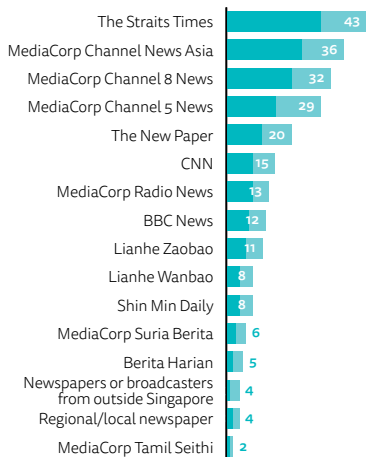
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

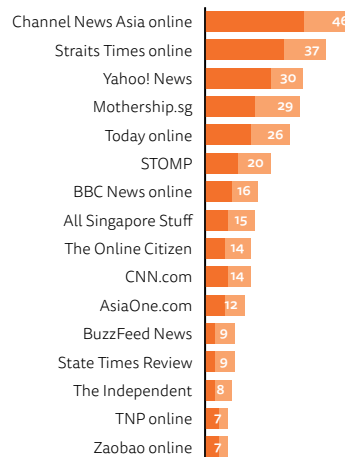
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



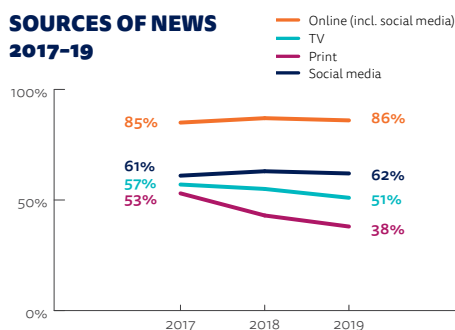
ONLINE



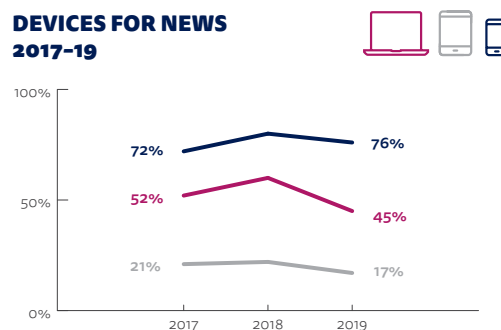
CHANGING MEDIA

Print consumption has declined significantly over the last few years while online and social media continue to be the most important source of news. In this high-tech city state, mobile news consumption dominates with over three-quarters (76%) accessing news via smartphone.

SOURCES OF NEWS 2017-19



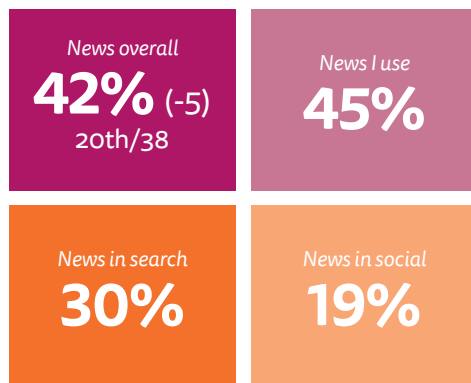
DEVICES FOR NEWS 2017-19



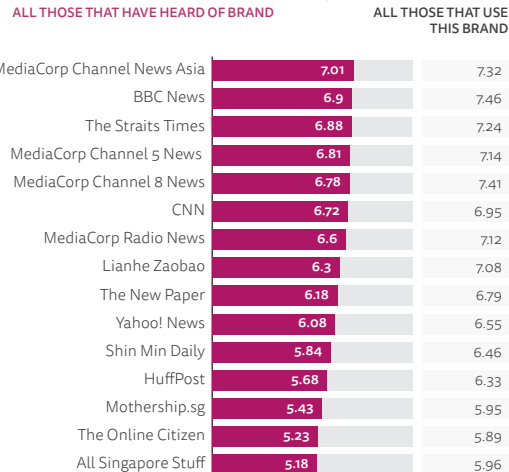
TRUST

Trust in the news decreased to 42% from 47% in 2018, perhaps driven in part by widespread political and media discussion of 'fake news'. Long-established traditional media companies tend to carry highest levels of trust – along with international brands like the BBC and CNN. Digital-only brands like mothership.sg seem to lack the track record and heritage that builds credibility with news users.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



16%
pay for
ONLINE NEWS

28%
listen to
PODCASTS in
the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	48% (-4)	74%
2	WhatsApp	41% (-1)	84%
3	YouTube	27% (+2)	73%
4	Instagram	15% (+4)	47%
5	Facebook Messenger	9% (-)	35%
6	Twitter	9% (-)	19%

41%
SHARE NEWS
via social, messaging or email

17%
COMMENT ON NEWS
via social or website

SOUTH KOREA

STATISTICS

Population	51m
Internet penetration	93%

Home-grown portals have become the leading destination for news consumers in South Korea in recent years, eroding the business models of traditional publishers. Now online video and podcasts are beginning to disrupt the broadcast sector.

Domestic portal sites such as Naver (66%) and Daum (34%) have dominated online news consumption for the last decade with a convenient mix of news, blogs, chat, shopping, games, and email. But with Korean users increasingly attracted by video, YouTube use is significantly up on last year (38% for news) and ahead of most other countries. In our survey, almost half of YouTube users (45%) said they have spent more time with the network in the last year. Additional evidence comes from Koreanclick.com, a web metrics company affiliated with Nielsen, showing YouTube mobile app users spending 1,094 minutes on average in July 2018, whereas Naver app users spent 700 minutes. Podcasts are also surging in popularity with half (53%) saying they had listened at least once in the last month. Domestic platforms increasingly complain about unfair competition and that international platforms like Google, Facebook, and Netflix, do not pay enough tax in South Korea.¹¹⁴

Meanwhile, Naver has refocused its news offering with a stripped-down beta version of its mobile app carrying just a search bar and a button on the home page. Faced with criticism over the neutrality with which it selects news for audiences, Naver has abandoned a default option selected by algorithms and staff and now asks users themselves to select news brands they want to see. Some critics fear this approach – if rolled out more fully – will favour the biggest, most popular brands and could squeeze out diversity.

As more people prefer to watch news videos on digital platforms, TV news consumption (67%) dropped by 7 points this year. In response, broadcasters are planning to open a 24-hour news channel on streaming services like YouTube. At the same time, print news consumption



has decreased from 28% in 2016 to 19% in 2019 according to our survey. The legacy media remain extremely concerned about their deteriorating finances but have struggled to find sustainable solutions. Discussions about raising the licence fee (currently about US\$2.5 per household per month) to support public broadcaster KBS have not made any progress. A proposal over tax exemption for newspaper subscription has been submitted, but it has not yet been approved by the government. Paywalls on most news sites are not a viable option given that most people can access news for free through online portals; just 10% pay for any online news in Korea. Nevertheless, some newspaper publishers have managed to diversify their revenue streams into ancillary businesses such as events and conventions.

Concerns about fake news and misinformation (59%) are rising with concern focused on the distribution of politically extreme views on YouTube. Last year, the government examined ways to effectively regulate fake news online, but concluded that any governmental intervention might curtail freedom of expression. Fact-checking has become a common practice in many newsrooms with Seoul National University (SNU) co-ordinating activity in around 30 newsrooms using a common platform, which in turn is financially supported by Naver. Trust in news is among the lowest again in our survey (22%). The reasons are clear with just a fifth (21%) agreeing that the news media are doing a good job in monitoring powerful people and businesses. In a related example, one leading newsroom decided not to print

a report about misconduct of a large corporation, leading to protests by young reporters over the issue of lack of editorial independence from advertisers.

In an attempt to improve transparency around government advertising, the National Assembly passed a new law governing the process. From the start of 2019, the Korea Press Foundation has become the legally entrusted agency for placing advertisements on behalf of governmental and the public sector. The KPF is required to invest their commission fees into a press fund to subsidise journalism and media literacy.

South Korea tends to be at the forefront of new technologies that are ushering in the next wave of change. In this survey, 9% said they were using voice-activated speakers – almost double the level of a year ago. Still, few newsrooms have shown serious interest in distributing news in this way. Giant telecom companies like KT, SKT, and LG U+ started 5G mobile services in April 2019. But it's not yet clear what kind of content and services will benefit or how they might be relevant for news.

Sonho Kim

Korea Press Foundation

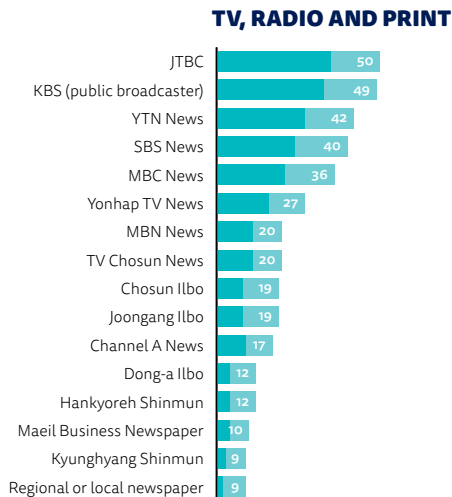
¹¹⁴ www.koreatimes.co.kr/www/tech/2018/08/129_253245.html

WEEKLY REACH OFFLINE AND ONLINE

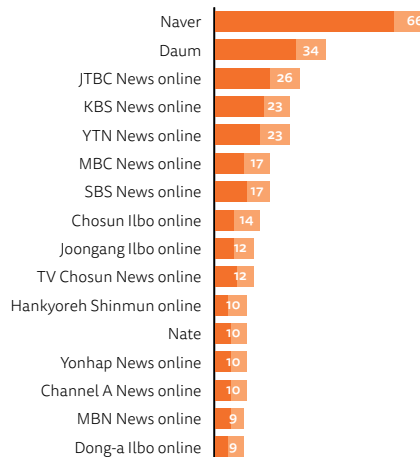
TOP BRANDS

% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



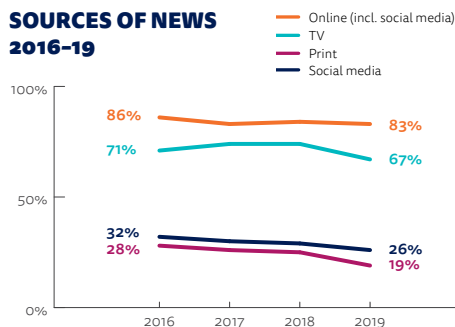
ONLINE



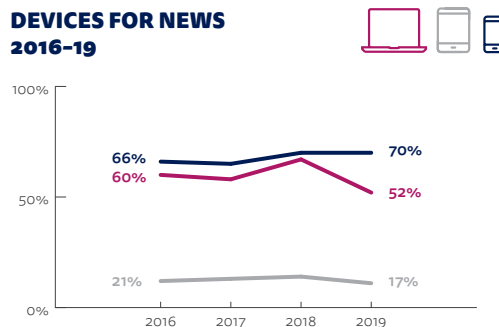
CHANGING MEDIA

Audiences for traditional TV news have started to dip partly due to more competition from long- and short-form video online. Readership of newspapers is also significantly down since 2016. More than two-thirds of our sample (70%) use a smartphone to access the news each week.

SOURCES OF NEWS 2016-19



DEVICES FOR NEWS 2016-19

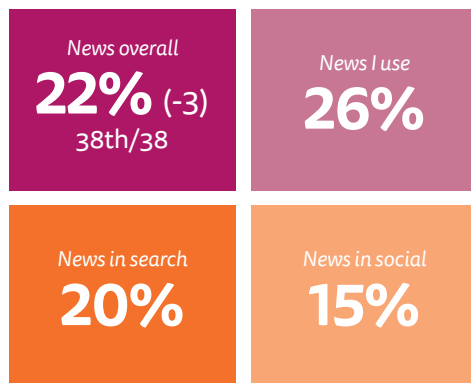


NB: 2018 figures for computer use were likely overstated due to an error in polling

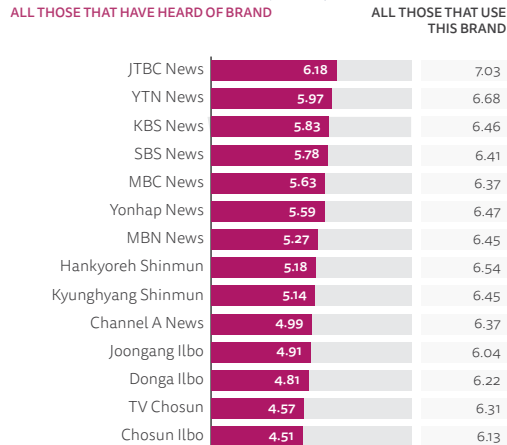
TRUST

Trust in the news in South Korea is consistently amongst the lowest in our survey, though trust in individual news brands is much higher. TV news brands such as JTBC and YTN tend to be trusted most with popular newspapers less trusted in general – even if they are often more trusted by those that use the brands regularly.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



10% pay for **ONLINE NEWS**

53% listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	YouTube	38% (+7)	68%
2	Kakao Talk	28% (-11)	72%
3	Facebook	22% (-3)	47%
4	Instagram	8% (+1)	31%
5	Twitter	7% (-1)	19%
6	Kakao Story	7% (-5)	30%

26% **SHARE NEWS** via social, messaging or email

16% **COMMENT ON NEWS** via social or website

TAIWAN

The media environment in Taiwan is among the freest and most competitive in Asia, even if mainland China continues to exert economic and political pressure on some outlets. The political and media story of the year has been the sudden rise of a conservative populist mayor with a national profile.

'Goods will flow out, people will flood in, and Kaohsiung will become a rich city', declared Han Kuo-yu, the newly elected mayor of Taiwan's third-largest city, in an inauguration ceremony shown across Taiwan. The dark-horse mayoral candidate from the pro-unification Nationalist Party (KMT) captured national headlines with promises to focus on the economy, to show no tolerance for political protest, and to bypass long-standing laws barring Chinese investment in real estate. Major news outlets rewarded Han's populist rhetoric with coverage that drew still more attention, in an echo of successful populist campaigns in other countries.

At least two factors help to explain what came to be called the 'Han Wave'. The first was the campaign's media strategy in a pluralistic environment dominated by private sector, often partisan TV news outlets. Han relied heavily on streams carried live on social media, and supporters were organised to disseminate pro-Han messages online. These messages would have reached large numbers of Taiwanese, given that 75% of our respondents used social media sites like Facebook and Line.

At the same time, Han's positions drew glowing coverage from the pro-Beijing Chung Tien News channel, which devoted significant time to Han's populist campaign. The relationship proved mutually beneficial: while Han gained attention, Chung Tien's ratings climbed, with the share of respondents who use the network weekly rising nearly 10 percentage points in our survey (to 44%). Other market-driven news outlets were forced to follow suit, covering Han's campaign heavily – and, according to critics, often quite uncritically.



STATISTICS

Population	24m
Internet penetration	88%

There have also been concerns about possible interference from mainland China, with observers noting the large number of foreign IP addresses amongst Han's supporters on social media. It was also noted that the owners of some of the TV channels (like Chung Tien and TVBS) had significant interests in China which may be influencing their editorial line. At one stage TVBS shelved an interview in which the US de facto ambassador warned about external forces attempting to manipulate public opinion.

In response to concerns, both citizens and politicians filed official complaints against Chung Tien with Taiwan's National Communications Commission (NCC), charging that the network produced false news stories and violated professional norms in devoting disproportionate coverage to Han's campaign. It fined the network US\$32,000 for breaching fact-checking principles. Chung Tien responded by accusing the agency of suppressing press freedom and attacking regulators personally in news programmes, which in turn sparked a student demonstration against the media outlet for abusing its power.

One bright spot is that this turmoil may improve the standing of public media, historically weak in Taiwan. The network is the most trusted in our survey, though not competitive in terms of audience (offline use: 16%). Media reform groups have urged Taiwan's Legislative Yuan to pass the Public Media Act in 2019, which would improve funding and support for major public media.

Niche outlets dedicated to quality journalism have also seen modest successes. The Commonwealth Media Group, which grew out of a respected business magazine, has developed several digital news channels. The group enjoyed growing online use (13%) and relatively high trust (6.41) in our latest survey. Meanwhile The Reporter, an independent news organisation, has continued to provide award-winning investigative stories on the environmental issues, children's welfare, and labour issues. The outlet has helped to create an ecosystem of public interest journalism by working with freelance reporters.

The spread of unreliable information remains a problem in Taiwan. In September 2018, a false story about how the Chinese Embassy in Japan had helped rescue a number of Taiwanese tourists in an airport near Osaka after a typhoon was widely reported by the media. The Taiwanese media blamed local officials for responding too slowly. The subsequent pressure on the Taiwanese Embassy in Japan may have contributed to the death of one official who later committed suicide.

Meanwhile Yahoo! News remains the most used online news source in Taiwan (51% weekly reach). It provides a convenient one-stop for news from multiple news providers along with email, blogs, and games. Yahoo! does not provide direct revenue for news providers but it does generate referral traffic for publishers from the prominent links to additional news stories. In the last two years, Yahoo! Taiwan has started to provide more of its own content including commentaries, online polls, and discussions.

Lihyun Lin
National Taiwan University

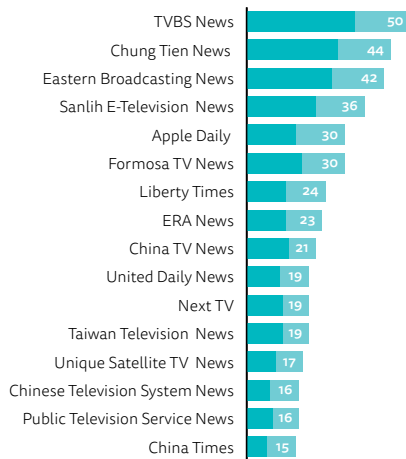
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

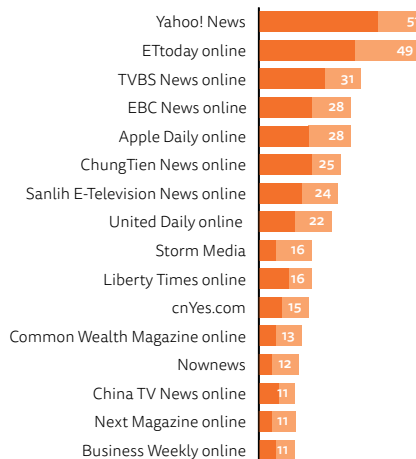
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

TV, RADIO AND PRINT



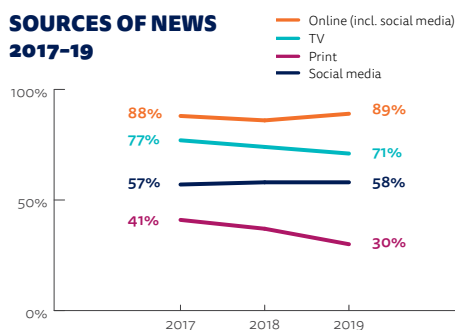
ONLINE



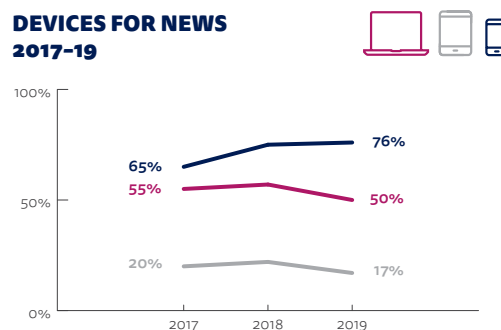
CHANGING MEDIA

Traditional media sources such as television and print are becoming less important while digital and social media have become more widely used. Taiwanese love their smartphones which are used by more than three-quarters (76%) of our survey sample to access news content. Computers have become relatively less important over time.

SOURCES OF NEWS 2017-19



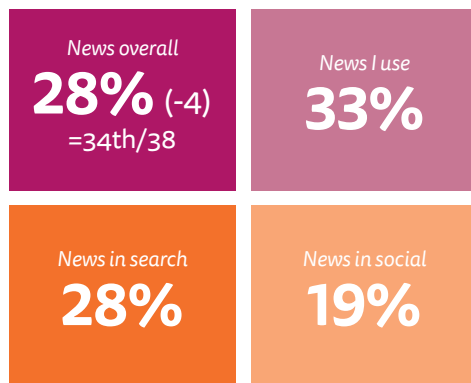
DEVICES FOR NEWS 2017-19



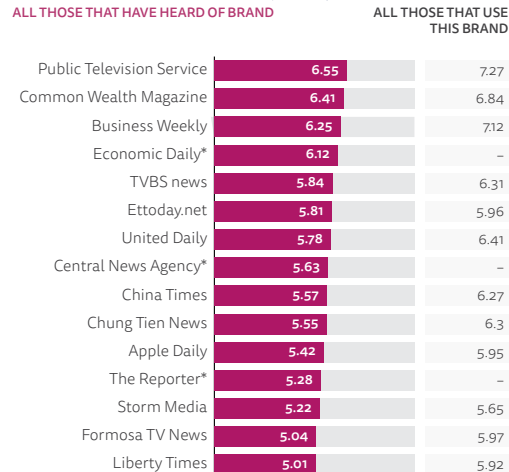
TRUST

Trust in news is down 4 percentage points to 28% with Taiwanese frequently exposed to misinformation through both mainstream and social media. Fact-checking Taiwan, an independent group, has publicly urged the social media giant Line to establish an internal verification operation along the lines of Facebook's fact-checking partnerships.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



* Some brands do not have trust scores for users of those brands (did not meet minimum 50 threshold or did not specifically ask about the use of the brand)

12%
pay for **ONLINE NEWS**

38%
listen to **PODCASTS** in the last month

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Line	57% (+4)	77%
2	Facebook	54% (-2)	77%
3	YouTube	43% (+5)	75%
4	PTT (bulletin board)	12% (-5)	22%
5	Facebook Messenger	8% (-)	37%
6	Instagram	7% (-)	28%

42%
SHARE NEWS
via social, messaging or email

23%
COMMENT ON NEWS
via social or website



Section 3

Analysis by Country

Africa

Africa		
3.38	South Africa	148

SOUTH AFRICA

There is a strong tradition of highly trusted, independent media in South Africa, but this is increasingly under threat. Trust is being eroded by a combination of unethical business practices, shoddy journalism, and escalating misinformation affecting critical national elections.

South Africa scores highly on the press freedom index, and largely enjoys a strong and ethical news environment. This is reflected in a 49% trust in media, one of the highest in our survey, perhaps bolstered by the media's recent role in exposing political patronage at the highest levels. News24, The Daily Maverick, and the amaBhungane Center for Investigative Journalism were three outlets that helped uncover the corrupt relationship between former president Jacob Zuma and the Guptas, a family implicated in the process that South Africans are terming 'state capture'. In the wake of the scandal, two major news outlets that were owned by the Guptas, the *New Age* newspaper and the 24hr TV news station Afrotone (formerly ANN7), were forced to close for political and economic reasons.

Meanwhile Independent Media, one of the country's largest media groups, has had the integrity of its news products severely compromised by its owner's interference in editorial policy, as well as its inability to pay back a questionably acquired loan of over R1bn to SA's Public Investment Corporation.¹¹⁵ The company has undergone several rounds of retrenchments, with a consequent decline in editorial standards.

The *Sunday Times* weekly newspaper, long one of the country's most trusted news brands, was forced to apologise for lapses in journalistic rigour and the publication of several false scoops, and had some of its journalism awards withdrawn.¹¹⁶ Despite this, it still sits at number six on the list of trusted news brands, but as with some of the *Independent* titles, it appears to be



burning through a reservoir of legacy trust established over many years. It remains to be seen if the appointment of a new editor will help.

In the run-up to the general election in May, misinformation on social media exploded, with news brands becoming both targets as well as sometimes unwitting amplifiers. There has been a surge in organisations training media and civil society to combat misinformation, and platforms such as Google and Twitter also allocated resources to help. Meanwhile the Independent Electoral Commission partnered with the NGO Media Monitoring Africa to produce a system for reporting misinformation. The battle against misinformation is made more difficult by South Africans' high usage of WhatsApp (88% for general purposes, and a high 49% for news among our online sample).

The state broadcaster, the SABC, is only the fourth most-trusted brand, perhaps a result of a protracted and damaging period of government interference and near-catastrophic financial mismanagement.¹¹⁷ On the positive side, it appears to be turning a corner with the appointment of a new, relatively apolitical board. The organisation still enjoys a high level of use for its multilingual television news programming (50%) and for its radio news (29%). Online, the SABC website also does well (45%) just behind the hugely popular News24 (70%), a digital-born early entrant into the market which aggregates content from a number of print brands such as City Press.

STATISTICS

Population	57m
Internet penetration	54%

Revenue for news media has been plummeting for several years now, with a 12% drop in ad spend last year for television, 5.6% for radio, and 7.7% for print.¹¹⁸ Despite 16% of respondents claiming they pay for online news, this figure will not be representative of South Africans as a whole given our urban and highly educated online sample. Indeed, most of the local news organisations with subscription paywalls decline to release their figures, suggesting the number of paying subscribers is still low. The surge of goodwill engendered by the media's role in exposing the Guptas has led to an upswing in reader donations to independent publications like the Daily Maverick and the investigative unit amaBhungane. But this is an uncertain form of income, and with no sustainable revenue model available, South African media houses are facing a grim future.

The big social media platforms have effectively won the battle for advertising revenue while resource-starved online and broadcast news brands face fierce competition from international English-speaking brands like the BBC and CNN. Over the last ten years, newspaper circulation has declined by 49%,¹¹⁹ and the majority of media houses seem to have no idea how to roll out successful hybrid subscriptions models that have worked elsewhere in the world.

Chris Roper
Code for Africa

¹¹⁵ Jackie Cameron, 'Iqbal Survé, Specialist in Media Capture AND State Capture', BizNews, 15 Apr. 2019. <https://www.biznews.com/undictated/2019/04/15/media-capture-iqbal-surve>

¹¹⁶ www.ewn.co.za/2018/10/14/sunday-times-apologises-for-tainted-scoops

¹¹⁷ Riaan Grobler, 'Motsoeneng's "reckless mismanagement" caused SABC's problems - Sanef', News24, 17 Sept. 2018. <https://www.news24.com/SouthAfrica/News/motsoenengs-reckless-mismanagement-caused-sabcs-problems-sanef-20180917>

¹¹⁸ www.themediainline.co.za/2018/03/gloomy-picture-for-tv-and-radio-advertising-spend-in-sa

¹¹⁹ Compiled by iSizwe Distributors from official data.

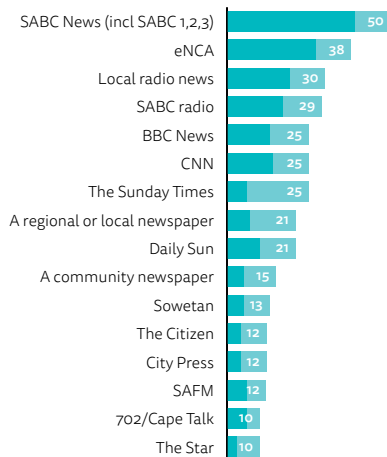
WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS

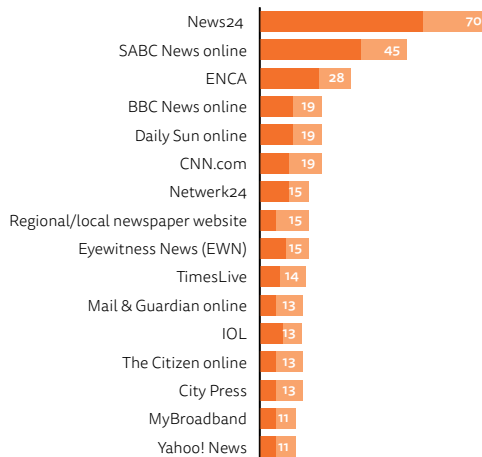
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

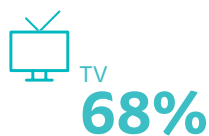
TV, RADIO AND PRINT



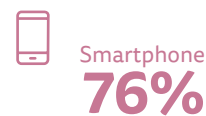
ONLINE



SOURCES OF NEWS



DEVICES FOR NEWS



TRUST

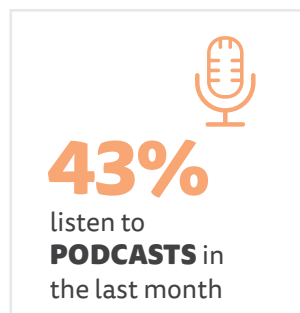
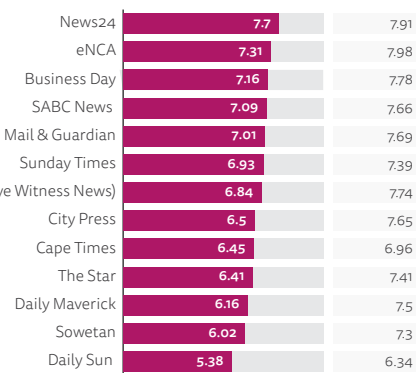
South African media has a strong reputation for independence but political and business interference is an increasing concern. The website News24 has built credibility on the back of investments in breaking news. Tabloid newspaper the Daily Sun is widely used but less well trusted.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

ALL THOSE THAT HAVE HEARD OF BRAND | ALL THOSE THAT USE THIS BRAND



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	Facebook	59%	80%
2	WhatsApp	49%	88%
3	YouTube	35%	73%
4	Twitter	20%	34%
5	Instagram	14%	41%
6	Facebook Messenger	14%	48%





Section 4

References and Selected Publications

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.

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Recent Reuters Institute Publications

Felix M. Simon and Lucas Graves, *Pay Models for Online News in the US and Europe: 2019 Update* (May 2019)

Joy Jenkins and Lucas Graves, *Case Studies in Collaborative Local Journalism* (Apr. 2019)

Julie Posetti with Felix M. Simon and Nabeelah Shabbir, *Lessons in Innovation: How International News Organisations Combat Disinformation through Mission-Driven Journalism* (Apr. 2019)

Zeenab Aneez, Taberez Ahmed Neyazi, Antonis Kalogeropoulos, and Rasmus Kleis Nielsen, *India Digital News Report* (Mar. 2019)

Nic Newman, *Journalism, Media and Technology Trends and Predictions 2019* (Jan. 2019)

J. Scott Brennen, Philip N. Howard, and Rasmus Kleis Nielsen, *An Industry-Led Debate: How UK Media Cover Artificial Intelligence* (Dec. 2018)

Tom Nicholls, Nabeelah Shabbir, Lucas Graves, and Rasmus Kleis Nielsen, *Coming of Age: Developments in Digital-Born News Media in Europe* (Dec. 2018)

Nic Newman, *The Future of Voice and the Implications for News* (Nov. 2018)

Antonis Kalogeropoulos and Rasmus Kleis Nielsen, *Social Inequalities in News Consumption* (Oct. 2018)

Alessio Cornia, Annika Sehl, David A. L. Levy, and Rasmus Kleis Nielsen, *Private Sector News, Social Media Distribution, and Algorithm Change* (Sept. 2018)

Jason Vir, Kathryn Hall, (Kantar Media), *News in Social Media and Messaging Apps* (Sept. 2018)

Lucas Graves, *Understanding the Promise and Limits of Automated Fact-Checking* (Feb. 2018)

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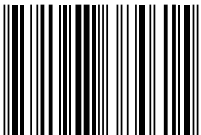
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