University of Oxford

Reuters Institute for the Study of Journalism

REUTERS INSTITUTE DIGITAL NEWS REPORT 2015

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TRACKING THE FUTURE OF NEWS

NIC NEWMAN

WITH DAVID A. L. LEVY AND RASMUS KLEIS NIELSEN

SUPPORTED BY

SURVEY BY

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FOREWORD

Dr David A. L. Levy
Director, Reuters Institute

This is our fourth annual report that looks to map the changing ecology of news across countries. The report is based on a survey of more than 20,000 people in 12 countries, which makes it the largest ongoing comparative study of news consumption in the world. We have added Australia and Ireland this year to a core set that includes France, Germany, Denmark, Finland, Italy, Spain, Brazil,[1] and Japan – along with the UK and US.

This year we find more compelling evidence about the central role being played by smartphones and a sharp increase in the use of social media for finding, sharing, and discussing the news. We see significant growth in the use of online video and new visual formats and track the global rise of Buzzfeed and the Huffington Post, companies that have become masters at creating and distributing content in a social and mobile world.

Once again we have combined the key data points with a series of essays, which add depth and context to the findings. The BBC's Director of News, James Harding reflects on the pace of change and the implications of growing information inequality. Emily Bell, Director of the Tow Center for Digital Innovation, looks at the implications of the increasing role played by Facebook and Google in the news value chain. Robert G. Picard picks his way through the changing business models from paid content to native advertising. YouGov's Director of Media Research, Shaun Austin explores consumer attitudes to branded and sponsored content – based on both survey and focus group work specially commissioned for this report. And also in our essays section, Alison Preston explores the generational divide in news consumption, along with the implications for industry and policy-makers.

Our academic partnerships continue to deepen. We are joined this year by the Tow Center at Columbia University, the News and Media Research Centre at Canberra University in Australia, and Dublin City University, Ireland. This active research community also includes our longstanding partners the Hans Bredow Institute in Hamburg, Roskilde University in Denmark, and the School of Communication at the University of Navarra in Spain.

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

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

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

Making all this possible, we are hugely grateful to our industry sponsors this year: Google, BBC, Ofcom, the Broadcasting Authority of Ireland (BAI), France Télévisions, L'Espresso group in Italy, the Media Industry Research Foundation of Finland, Edelman UK, as well as our academic sponsors and partners at Roskilde University, the Hans Bredow Institute, the University of Navarra, the Tow Center at Columbia University's Graduate School of Journalism, and the University of Canberra.

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

[1] The survey only covered urban Brazil. See the following section on methodology.

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 2015.

- The data were weighted to targets based on census/industry accepted data, such as age, gender, region, newspaper readership, and social grade, to represent the total population of each country. The sample is reflective of the population that has access to the internet.
- As this survey deals with news consumption, we filtered out anyone who said that they had not consumed any news in the past month, in order to ensure that irrelevant responses didn't adversely affect data quality. This category averaged around 5% but was as high as 11% in the US.
- A comprehensive online questionnaire was designed to capture all aspects of news consumption.
- Core questions were asked in France, Germany, Denmark, Finland, Spain, Italy, Japan, Brazil, Australia, Ireland the US, as well as the UK, where there was a slightly longer questionnaire.
- Online focus groups were also held in the UK and US to complement survey data on sponsored and branded content.

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

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

Country	Starting sample	Non News Users	Final Sample Size	Total population	Internet penetration
US	2588	11%	2295	318,892,103	87%
UK	2313	7%	2149	63,742,977	90%
Germany	2035	3%	1969	80,996,685	89%
Spain	2127	5%	2026	47,737,941	75%
Italy	2059	3%	2006	61,680,122	59%
France	2131	7%	1991	66,259,012	83%
Ireland	1575	5%	1501	4,832,765	79%
Denmark	2097	4%	2019	5,569,077	97%
Finland	1527	1%	1509	5,268,799	97%
Urban Brazil	2091	3%	2033	202,656,788	54%
Japan	2141	6%	2017	127,103,388	86%
Australia	2164	6%	2042	22,507,617	94%

Please note that Brazil is representative of an urban population rather than a national population. As such the internet penetration is likely to be higher than stated above, which must be taken into consideration when interpreting results.
Source: Internet World Stats www.internetworldstats.com internet population estimate 2014.

AUTHORSHIP AND RESEARCH ACKNOWLEDGEMENTS

Dr David A. L. Levy is Director of the Reuters Institute for the Study of Journalism and an expert in media policy and regulation. He previously worked at the BBC both as a news and current affairs producer, reporter, and editor, and later as Controller Public Policy. He is the author of *Europe's Digital Revolution: Broadcasting Regulation, the EU and the Nation State* (1999/2001), and joint editor with Tim Gardam of *The Price of Plurality* (2008), with Rasmus Kleis Nielsen of *The Changing Business of Journalism and its Implications for Democracy* (2010) and with Robert G. Picard of *Is there a Better Structure for News Providers? The Potential in Charitable and Trust Ownership* (2011). He recently co-authored *The Public Appetite for Foreign News on TV and Online* (2013) and jointly edited, with Nigel Bowles and James T. Hamilton, *Transparency in Politics and the Media: Accountability and Open Government* (2013).

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

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

Commentary and additional insight has been provided by academic partners and by our network of Reuters Journalist Fellows around the world,[2] particularly in providing national context on our country pages, where authorship is indicated by initials. We are particularly grateful to:

- **Fergus Pitt** (FP), Senior Research Fellow, Tow Center at the Columbia School of Journalism
- **Alexandre Lechenet** (AL), Reuters Journalist Fellow and writer and data-journalist at *Libération*
- **Esa Reunanen** (ER), University of Tampere, Finland
- **Kim Christian Schrøder** (KCS), Professor, Department of Communication at Roskilde University (RUC) in Denmark
- **Samuel Negredo** (SN), **Alfonso Vara** (AV) and **Avelino Amoedo** (AA), Center for Internet Studies and Digital Life at the University of Navarra
- **Uwe Hasebrink** (UH) and **Sascha Hölig** (SH), Professor and Senior Researcher at the Hans Bredow Institute for Media Research, Hamburg
- **Flávia Marreiro** (FM), former Reuters Journalist Fellow and São Paulo-based sub-editor at the Spanish newspaper El País
- **Nicola Bruno** (NB), former Reuters Journalist Fellow, co-founder and journalist at the news agency Effecinque.org in Italy
- **Yasuomi Sawa** (YS), former Reuters Journalist Fellow and journalist who has been working with Kyodo News, Japan
- **Jerry Watkins** (JW), Associate Professor and Director, News and Media Research Centre at University of Canberra
- **Michelle Dunne Breen** (MDW), Research Associate, News and Media Research Centre at University of Canberra
- **Jane Suiter** (JS), Director of the Institute for Future Journalism and Media at Dublin City University
- **Niamh Kirk** (NK) Researcher and PhD Candidate (Journalism and Digital Media) in the School of Communications, Dublin City University

Additional expert analysis and interpretation of the survey data were provided by Richard Fletcher at the Reuters Institute and also by the team at YouGov, in particular, Shaun Austin, Charlotte Clifford, David Eastbury, and Alice Kerry.

[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.

EXECUTIVE SUMMARY AND KEY FINDINGS

Nic Newman, *Research Associate, Reuters Institute*

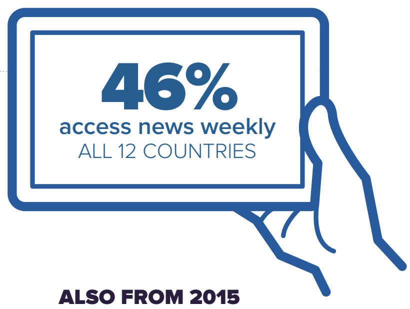
This year's data see a quickening of the pace towards social and mobile news, a decline in desktop internet, and significant growth in video news consumption online.

At the same time, we see the continued centrality of traditional platforms – particularly television – and ever more stark country-based and generational divides over the way news is found, consumed, and distributed.

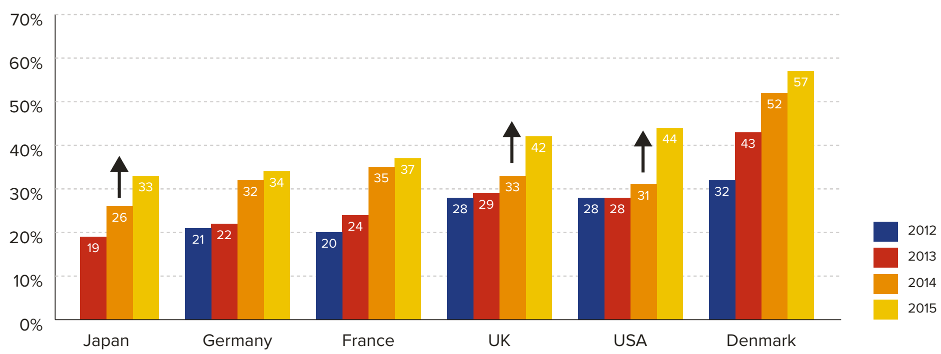
- We see the smartphone more clearly as *the* defining device for digital news with a disruptive impact on consumption, formats, and business models. Our data suggest it provides an environment dominated by a few successful brands, with others struggling to reach a wider audience, both via apps and browsers.
- The move to online video, new visual formats, and social media coincides in many countries with a fall in audiences for traditional TV bulletins. The trend is most pronounced amongst the under 35s.
- We see a strengthening in the role played by Facebook in finding, discussing and sharing news. Facebook-owned Instagram and WhatsApp are playing a big role amongst younger groups.
- The increasing importance of search and social as gateways to news has raised concerns over online 'filter bubbles', but our respondents say these services help them find more diverse news and lead them to click on brands they do not normally use.
- We see an intensifying battle for global audiences online involving new players like the Huffington Post and Buzzfeed, expanding global newspapers like the *Guardian* and *New York Times* and old stalwarts including the BBC and CNN.
- Finally we find significant consumer dissatisfaction with online advertising, expressed through the rapid take up of ad blockers and disquiet over the blurring lines between editorial and advertising.

MOBILE GROWTH

News accessed from smartphones has jumped significantly over the last 12 months, particularly in the UK, US, and Japan. Average weekly usage has grown from 37 to 46% across all our countries. Two-thirds of smartphone users (66%) are now using the devices for news every week.



SMARTPHONE NEWS USE 2012–2015



ALSO FROM 2015

Australia	**59%**
Ireland	**52%**
Finland	**50%**
Spain	**48%**
Italy	**44%**

Q8b. Which, if any, of the following devices have you used to access news in the last week? Please select all that apply. *Base: Total sample in each country 2012–2015.*

Surprisingly, given the amount of time spent in apps generally, people in most countries say they are likely to access news via a mobile browser. This suggests that news may not always be a primary destination but will often be found through links from social media or email. Only the UK bucks the trend, with the mobile app preferred (46%) over the browser (40%) and 10% saying they use them about the same.

On average people use a small number of trusted news sources on the mobile phone. The average across all countries is 1.52 per person, significantly fewer than on a tablet or computer. We also find that, even though 70% of smartphone users have a news app installed on their phone, only a third of respondents actually use them in a given week, reinforcing the difficulty many news brands have in cutting through on this crowded and very personal device.

In the UK, over half of smartphone news users (51%) regularly use the BBC News app, the only country where we see this level of reach.

In many countries these trends mean that for many publishers the majority of traffic comes from new mobile devices. In launching its new responsive design site in early 2015, the BBC revealed[3] that 65% of traffic is now generated by smartphones and tablets.

TOP NEWS APPS
SELECTED COUNTRIES

Country		Smartphone	Mean no of news apps
UK	BBC NEWS	51%	1.5
US	FOX NEWS	14%	1.7
Germany	SPIEGEL ONLINE	15%	1.7
Australia	ABC	16%	1.3

Q19a. You say you access news via a SMARTPHONE. When using that device what news sources have you accessed in the last week? *Base: All who accessed news on a smartphone in the last week UK=807, US=910, Germany=617, Australia=1067.*

Across all our countries a quarter of our sample (25%) now say the smartphone is their MAIN device for accessing digital news – up from 20% last year. That figure rises to two-fifths (41%) of those aged under 35.

WEEKLY ACCESS FOR NEWS
ALL COUNTRIES

45% use two or more digital devices

16% use three or more digital devices

TABLETS' GROWTH SLOWING, COMPUTERS' IMPORTANCE ON THE SLIDE

In contrast we find tablet growth for news weakening in most countries (with the exception of the UK). Bigger smartphone screens, along with growing penetration, look to be reducing the need for a separate, less portable touch screen device in the home.

The role of the laptop and desktop computer is also changing. Only just over half (57%) now consider it their most important device for accessing online news – down eight percentage points from last year. The computer remains the most important device in the office, but at home in communal and personal spaces it is being squeezed by the adoption of tablets and smartphones.

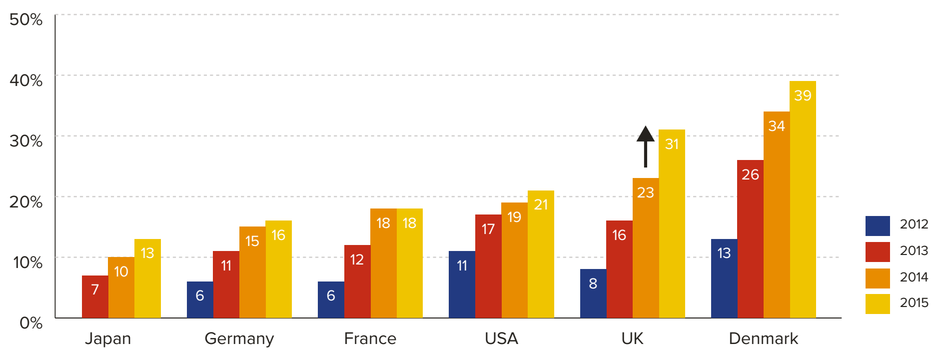
But the key trend is not around replacement of one device with another; rather it is that far more people are using two or three devices to access the news.

In the US, 41% (+6) use two or more devices to access news on a weekly basis. In the UK, the figure is 44% (+9), 59% in Denmark, and 58% in Australia.

Smartphones and tablets are extending our access points making us more connected to the news at home and on the move.

See section 4.1, The Growth of Screens and New Platforms, p. 68.

TABLET NEWS USE 2012–2015



ALSO FROM 2015

Australia	**35%**
Ireland	**22%**
Finland	**26%**
Spain	**24%**
Italy	**19%**
Brazil	**19%**

Q8b. Which, if any, of the following devices have you used to access news in the last week? Please select all that apply. *Base: Total sample in each country* 2012–2015.

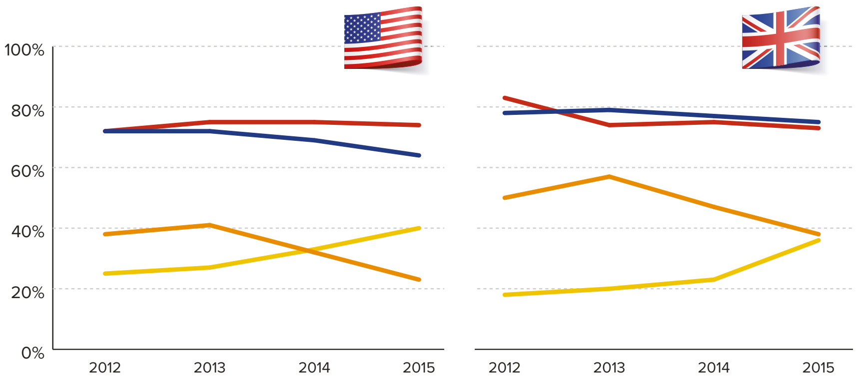
[3] www.bbc.co.uk/news/technology-31966686

THE ENDURING STRENGTH OF TV, DECLINE OF PRINT, AND THE RAPID RISE OF SOCIAL MEDIA

We now have four years of data looking at the sources people use for news. In most countries we see a consistent pattern, with television news and online news the most frequently accessed, while printed newspapers have declined significantly and social media are growing rapidly.

This online survey is likely to underestimate the true levels of access to television news but even so we can detect in the US and UK some fall-off in topline figures – specifically in the number of people watching scheduled TV bulletins and programmes. This is particularly the case with the young where in the United States less than a third (31%) of under 45s now watch a scheduled TV bulletin compared with 42% two years ago. It is a similar story in the UK – 46% down from 56% in 2013.

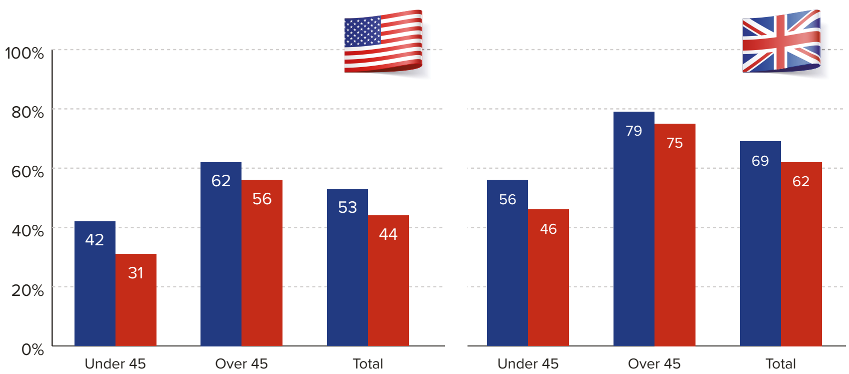
SOURCES OF NEWS 2012–2015
TV, ONLINE, PRINT AND SOCIAL MEDIA



- TV
- Online (incl. social media)
- Printed newspapers
- Social

Q3. Which, if any, of the following have you used in the last week as a source of news? *Base: All 2012–2015 – UK: 2076/2078/ 2082/2149; USA: 845/2028/2197/2295. NB: 2014 data have been estimated because of an issue with randomisation of news sources in the questionnaire.*

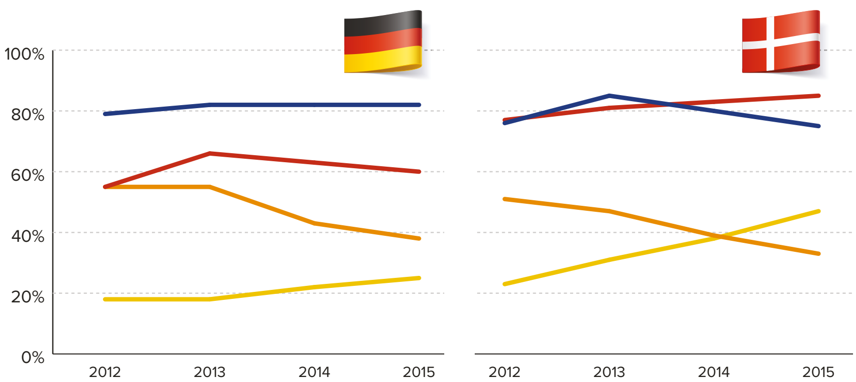
WEEKLY ACCESS TO TV NEWS PROGRAMMES AND BULLETINS
US AND UK



- 2013
- 2015

Q3. Which, if any, of the following have you used in the last week as a source of news? *Base: Total sample 2013/2015 – UK: 2078/2149; USA: 2028/2295.*

SOURCES OF NEWS 2012–2015
TV, ONLINE, PRINT AND SOCIAL MEDIA



- TV
- Online (incl. social media)
- Printed newspapers
- Social

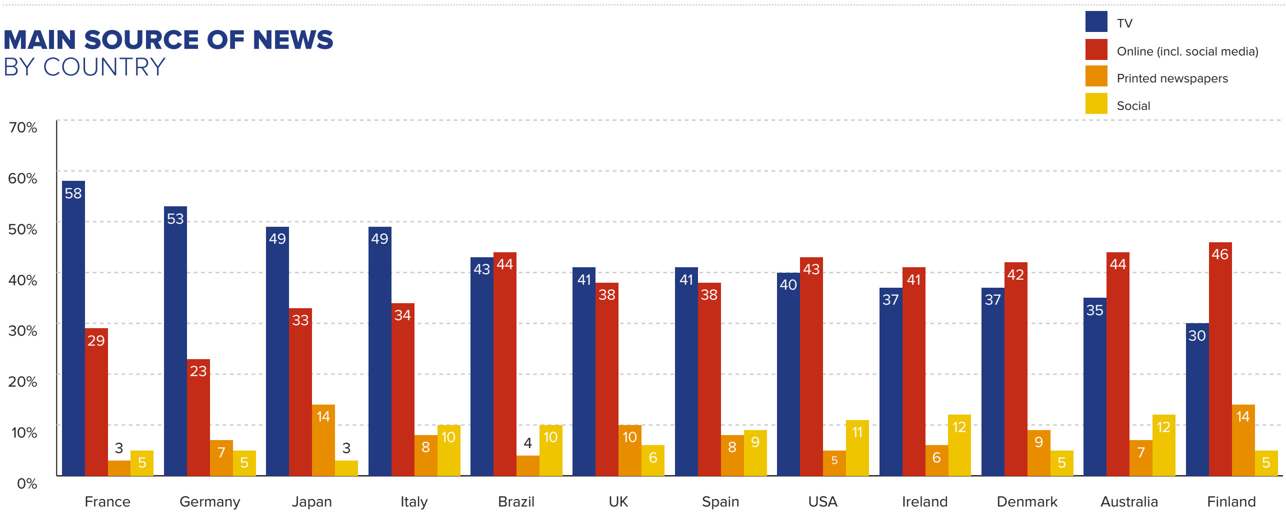
Q3. Which, if any, of the following have you used in the last week as a source of news? *Base: Total sample 2012–2015 – Germany: 970/1062/2063/1969; Denmark 1002/1007/2036/2019. NB: 2014 data have been estimated because of an issue with randomisation of news sources in the questionnaire.*

But the picture is not the same in all countries. TV viewing in Germany has hardly been affected; indeed it remains strong even with the young – 58% of under-35s still watch a scheduled programme or bulletin – while social media growth is less pronounced (see chart above). In Denmark we don't see online's strength significantly affecting TV; though print is down, online is up, and social media have become a major part of the equation.

Weekly access is only one part of the picture. We also track the value of different news sources and again we see that TV news comes out even more strongly as the most important source of news in the majority of countries – with the exception of the US and Finland where online is ahead. Social media are now considered more important than print in the US, Ireland, Brazil, Italy, France, Spain, and Australia.

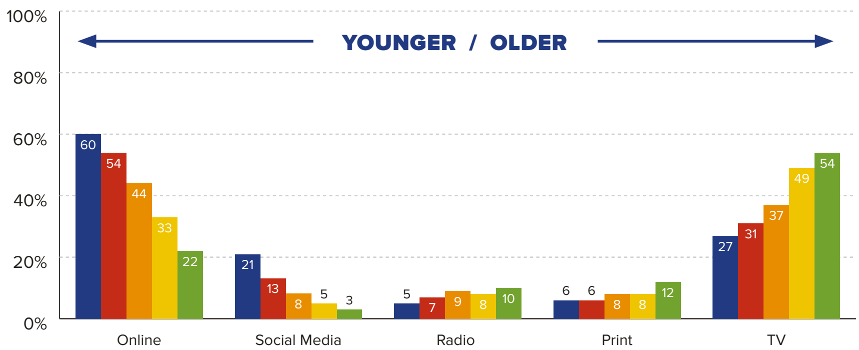
France, Germany, and Japan have the strongest allegiance to traditional media and they have been slower to adopt new digital trends such as smartphones and social media. But these averages hide even more stark splits between generations. Young Germans or Japanese are likely to have more in common with young Americans or Finns in preferring online news and social media to TV news, radio, or print.

MAIN SOURCE OF NEWS
BY COUNTRY



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 who used a source of news in the last week in each country.*

MAIN SOURCE OF NEWS
BY AGE



18-24
25-34
35-44
45-54
55+

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 who have used a source of news in the last week All = 23155.*

VALUE OF DIFFERENT NEWS SOURCES

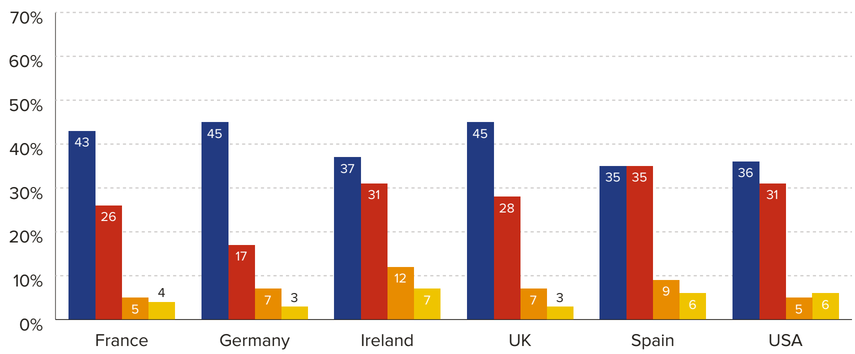
We have also broken down – for the first time this year– the concept of value into a number of dimensions, including speed, serendipity, and accuracy. Once again TV comes out strongest for accuracy, even if you take into account the fact that it is the most widely used news medium in most countries (see chart overleaf).

Even *social media users* value TV most for accuracy and reliability – and by some margin. Only 12% of these say social media is best for accuracy, compared with 37% for TV.

Social media are not seen as a destination for accurate and reliable journalism but more as a way of getting access to it.

See section 2.1 Sources of News, p. 52.

BEST SOURCE FOR ACCURACY
SELECTED COUNTRIES



Q3aiv. For accuracy and reliability, which one of the sources that you've used in the last week do you find best? *Base: All who used a source of news in the last week in each country UK = 2105, US = 2198, France = 1947, Germany = 1943, Spain = 1904, Ireland = 1486.*

TRUST IN THE NEWS

The link between strong TV news consumption and trust is also to be found in a general question we ask about how much you trust the sources of news available. We compare this with trust in the specific sources you use.

Overall we find significant differences in general trust, with over two-thirds (68%) agreeing that they trusted the media in Finland, compared with only one-third in the United States (32%), Spain (34%), and Italy (35%). Many of the countries with the highest levels of trust also have well-funded public service broadcasters.

There is a strong link between overall trust and last year's data about the value placed on sources that tried to be impartial (neutral) in how the news was covered.

See section 2.3 Trust in the News, p. 57.

TRUST IN THE NEWS
ALL COUNTRIES

	FIN	BRA	GER	DEN	UK	JPN	IRE	AUS	FRA	ITA	SPA	USA
Trust in general	68%	62%	60%	57%	51%	46%	46%	39%	38%	35%	34%	32%
Trust in my sources	73%	70%	68%	65%	64%	50%	57%	53%	49%	48%	46%	56%

MORE TRUST / LESS TRUST

Q6a. Thinking about news in general, do you agree or disagree with the following statement? 'I think you can trust most news most of the time'/ **Q6b.** 'I think I can trust most of the news that I use most of the time'. *Base: Total sample in each country.*

THE ROLE OF SOCIAL NETWORKS

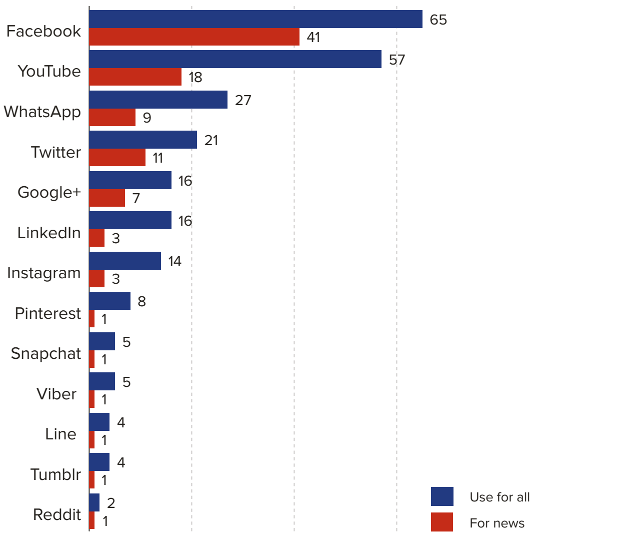
Over the past year there has been a new focus on the role of Facebook in distribution of online news. Publishers have reported greater traffic from Facebook following changes to its algorithms and the introduction of autoplay for short videos. Our data show that Facebook is becoming increasingly dominant, with 41% (+6) using the network to find, read, watch, share, or comment on the news each week – more than twice the usage of its nearest rival.

The strong growth of both WhatsApp and Instagram – which are both popular with the young – has strengthened Facebook's hold on social discovery in the last year.

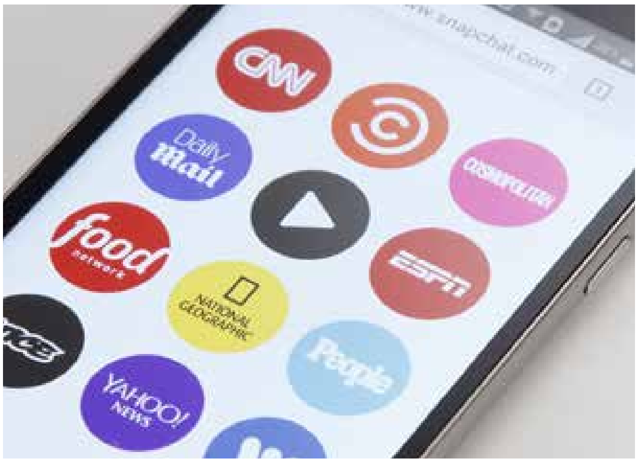
41%
access news via Facebook each week

Facebook own WhatsApp and Instagram

TOP SOCIAL NETWORKS FOR NEWS
AND FOR ANY PURPOSE



Q12a. Which, if any, of the following have you used for any purpose in the last week? **Q12b.** Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply. *Base: All = 23557.*



These averages mask significant differences between genders, ages, and countries in terms of the networks used. 18–24s continue to use Facebook and Twitter but have also adopted other networks and messaging apps for more private conversations, sharing pictures, and a different tone. Snapchat[4] and Instagram are actively courting publishers and offering opportunities to push and monetise content, notably with the launch of Snapchat Discover (see picture above). News publishers are also setting up branded accounts on these new networks as a way of reaching younger audiences.

OUTSIDE THE UNITED STATES

Elsewhere we see a different mix of secondary networks. Line is popular in Japan; Viber has significant reach in Ireland and Australia; Finland has a popular chat network Suomi24, while France is the home of Daily Motion, a popular video network that was widely used during the *Charlie Hebdo* attacks.

WhatsApp is hardly used in the United States but is a growing force elsewhere. It played a major part in last year's Brazilian elections and is also used for traffic updates. Many brands now offer WhatsApp sharing buttons on their websites but it remains a commercial-free zone and the network makes it notoriously difficult to push messages to multiple users.[5]

Other home-grown networks like Tuenti in Spain and Mixi in Japan have been losing ground over the last few years in the face of growing competition. Google closed its Orkut service in Brazil last year, effectively conceding the battle to Facebook in one of the world's most active markets. Only in Japan is Facebook NOT the largest network for news. The next chart shows strong growth in Facebook over the past year in a number of countries including France, UK, and Denmark. Germany and Japan have bucked the trend partly because of a reluctance in those countries to use real names while posting in social networks.

TOP COUNTRIES FOR WHATSAPP

Country	Use for all	Use for news (change last 12 months)
Spain	67%	27% (+1)
Brazil	61%	34% (+19)
Italy	49%	18% (+5)
Germany	41%	9% (+3)
Finland	32%	4%
Australia	25%	7%

Q12a/b. Which, if any, of the following have you used for any purpose/for news in the last week? WhatsApp code shown. *Base: Total sample Germany = 1969, Finland = 1509, Italy = 2006, Spain = 2026, Brazil = 2033, Australia = 2042.*

FACEBOOK USE FOR NEWS 2014–15
SELECTED COUNTRIES

	UK	US	FRA	DEN	GER	JPN
2014	22%	37%	27%	31%	26%	12%
2015	29%	40%	35%	44%	23%	11%
Change	+7	+3	+8	+13	-3	-1

Q12b. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply. *Base: Total sample 2014/2015 UK = 2082/2149, US = 2197/2295, France = 1946/1991, Germany = 2063/1969, Denmark = 2036/2019, Japan = 1973/2017.*

4 techcrunch.com/2015/03/02/new-data-shows-mobile-data-consumption-skyrocketing-following-snapchat-discovers-launch
5 digiday.com/publishers/publishers-whatsapp-alerts-easier-said-done

As Facebook – and YouTube and Twitter – talk to publishers about hosting more content on their platforms, there is renewed concern about the power of these networks, about the lack of transparency around the algorithms that surface content and about the extent to which publishers will get a fair return for the quality content that drives so much social media usage. These issues are tackled in an important essay from Emily Bell, Director of the Tow Center for Digital Journalism at Columbia University.

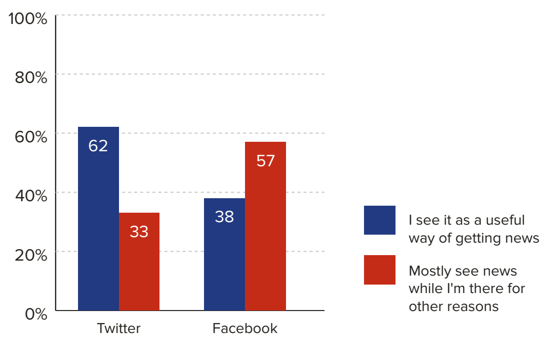
See Emily Bell, 'The Rise of Mobile and Social News – and What it Means for Journalism', p. 89.

WE SEEK NEWS ON TWITTER BUT BUMP INTO IT ON FACEBOOK

Facebook and Twitter remain the most important networks for news in terms of referrals and engagement. But our survey throws up important differences between the two. In Facebook – which has a very general audience and wide remit – the pursuit of news is secondary, with the main aim being communicating with friends. Twitter, on the other hand, is seen much more as an active destination for news by an audience that is deeply interested in latest developments.

See section 4.4 for more on Social Networks and their Role in News, p. 80.

RELATIVE IMPORTANCE OF NEWS
TWITTER AND FACEBOOK COMPARED



Q12cii/dii. You say you use Twitter/Facebook for news. Which of the following statements applies best to you? *Base: All those in UK, US, Italy, Australia, who used Twitter/Facebook for news in the last week. All = 861/3560.*

Our report this year also casts further light on the role of social media in political news and discourse.

Around a fifth of social media users follow a politician or political party in Australia (17%), Italy (20%) and the UK (23%) with more than a quarter (28%) doing so in the United States.

See section 2.6 Interest in Different Types of News, p. 62.

GROWTH IN ONLINE NEWS VIDEO

There has been a significant increase in the consumption of online news video, notably in Spain (+10), Denmark (+8), UK (+5), Italy (+5), and Japan (+5). This reflects the new strategies from social networks to display and play more video and a greater supply of video from publishers. News organisations have set up or expanded teams over the last year to create – or repackage video – partly because advertising premiums are far higher than for text news and partly to take advantage of new distribution opportunities.

23% access online news video weekly
ALL COUNTRY AVERAGE

40% find text more convenient

29% put off by preroll ads

21% rather watch on a big screen

More of us are using video but others remain to be convinced. In seven countries[6] we asked those who said they *didn't* use video about the reasons. Four in ten (40%) say they find reading text more convenient, almost a third (29%) are put off by preroll ads, and a fifth (21%) say they'd rather watch on a bigger screen.

Of those who *are* using news video the most popular format is short-recorded clips that add drama to a news event (49%) or add context or analysis to a text story (46%).

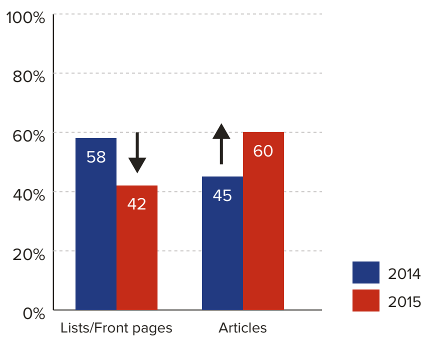
The growth of video is part of a wider adoption of new visual online formats, many of which are also well suited to mobile and social media. Examples include infographics, pictures with text, as well as a range of short-form video formats. Publishers are creating more of this content and more is being consumed.

See section 4.2 New Formats and the Role of Video, p.73.

GATEWAYS TO NEWS

Although audiences still consume the majority of their online news from familiar and trusted brands, the way they access that content is changing. The starting point to a news journey is less likely to be a brand homepage and increasingly likely to be via a search engine, a social network, email, or the lockscreen of a smartphone.

TYPES OF NEWS CONTENT ACCESSED WEEKLY



Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select ALL that apply. *Base: 2014/2015 All = 18859/23557.*

We see significantly fewer people accessing the front page of a news website where a list of stories is displayed. More people are going directly to stories via a side door such as search or social media.

Our data show very different patterns of access across countries. In countries like the UK, Denmark, and Finland, branded websites are often the starting point for any news journey. By contrast, in Italy, Spain, Germany, or France, a search engine is often the key gateway while social media are important in Australia and Urban Brazil. Email and mobile notifications are also an important part of the picture.

The strength of search in countries like Spain, Brazil, and Germany in part explains why there has been so much heat there over the relationship with Google – and so little fuss in the UK or Denmark. In Spain, Google News was closed in November 2014 after a law was passed that would have forced payment for the use of news snippets – though some news results are still available. A similar law in Germany led to links being dropped by Google for a time until a number of publishers decided to opt back in.

Meanwhile social media traffic has grown significantly in the past year and for some publishers has become more important than search.

STARTING POINTS FOR NEWS
ALL COUNTRIES

	UK	US	FRA	GER	IRE	DEN	FIN	ITA	SPA	JPN	BRA	AUS
Direct to news brand	52%	36%	27%	26%	44%	54%	63%	20%	36%	15%	46%	33%
Search	32%	40%	40%	45%	46%	29%	26%	66%	54%	54%	52%	49%
Social Media	28%	35%	21%	20%	36%	38%	28%	33%	35%	14%	48%	41%
Email	10%	25%	21%	15%	9%	24%	9%	17%	14%	15%	23%	20%
Mobile notifications and alerts	10%	13%	14%	9%	9%	9%	7%	7%	8%	7%	11%	9%

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? Please select all that apply. *Base: Total sample in each country.*

[6] UK, US, France, Germany, Italy, Finland, and Ireland.

SEARCH AND SOCIAL MEDIA DRIVE GREATER DIVERSITY

The growth of search and social media as gateways to news has also raised concerns over the potential for online 'filter bubbles', but our research suggests that they may help audiences find more diverse forms of news. Three-quarters of social media users (76%) and search users (73%) said they sometimes or frequently accessed different sources – leading them to brands they would not otherwise use.

We also find that the strength of a *particular* brand in social media is often a critical factor in the choice of which link to choose. A trusted brand (37%) is a key factor likely to influence the choice in a social network, whereas the relevance of the headline is by far the most important factor in search results.

The other key point about social news discovery is that it reaches different demographics – including women and younger groups in general. Those who visit news sites regularly, sign up for email, or receive mobile notifications are heavily male skewed. Search is more even but social is the only discovery mechanism that appeals more to female users.

76%

Social media users regularly access new or different sources

HOW SOCIAL MEDIA HELPS ATTRACT FEMALE USERS

	Social	Search	Brand	Email	Notificat.
Male	27%	46%	41%	19%	11%
Female	36%	44%	33%	16%	8%

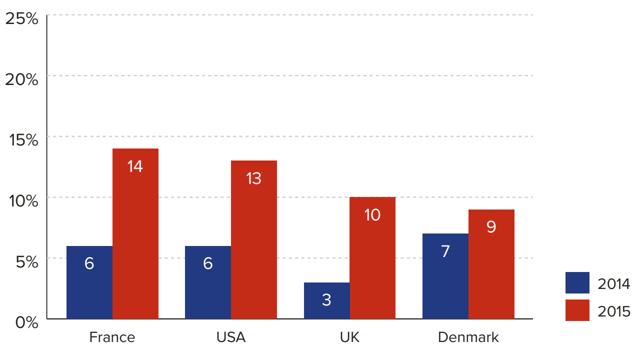
Q10. Thinking about how you got news online (via computer, mobile, or any device) in the LAST WEEK, which were the ways in which you came across news stories? Please select all that apply. *Base: Male/Female All = 11339/12218.*

MOBILE NOTIFICATIONS

In the past year we have seen a significant jump in the usage of mobile alerts and notifications in a number of countries led by France, the US, and UK (see chart below). These mechanisms are becoming a key way of reminding consumers of the relevance of a news brand in an increasingly competitive news market.

With the launch of the Apple Watch, the importance of notifications is likely to grow further as the battle for our attention reaches our wrists.

GROWTH OF MOBILE NOTIFICATIONS
SELECTED MARKETS



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? Showing code for mobile alerts. *Base: Total sample 2014–15 UK = 2082/2149, US = 2197/2295, Denmark = 2036/2019, France = 1946/1991.*

Social media, email, and mobile notifications are now becoming key retention and distribution strategies for media companies. As such they feed advertising business models driven by page views but also bring new users in for subscription businesses.

The key challenge is to coordinate those strategies better so that individual consumers are not bombarded with irrelevant messages and that publishers use data more effectively to deliver more relevant content at the right time and on the right platform. For all these reasons news organisations are increasingly setting up audience engagement teams to seed content, optimise headlines, pictures, and links across a growing number of platforms.

See section 4.3 Pathways to News: How Audiences Discover News Online, p. 76.

THE BATTLE FOR GLOBAL AUDIENCES

The internet has removed the barriers around distribution of news and this has led over the years to several attempts to create a news formula that can be repeated profitably across the world. Yahoo and MSN built successful businesses around email and web news portals, but now these are losing ground to a new wave of digital-born companies based on social and mobile news approaches. Yahoo News, for example, has lost almost a third of its US reach in the last two years.

By contrast, the Huffington Post is one of the most accessed sites in the United States and now also operates in 14 countries around the world. Buzzfeed has doubled its reach in the US and UK over the last year and has established a strong foothold in a number of countries amongst the young. Vice is also making its mark with online video content that speaks to a younger generation.

If we weight the data by population we find that across our countries Yahoo is in the lead, but this is mainly due to its strong position in Japan – where in reality the American company only has a relatively small stake.

Meanwhile the *Daily Mail*, the *Guardian*, the *New York Times*, the BBC, and CNN are engaged in a battle for English-speaking audiences in the US, UK, Australia, and elsewhere. The BBC and CNN remain strong globally – not least when you take into account their enormous reach via TV and radio.

TOP GLOBAL BRANDS
DIGITAL BORN

	Huff Post	Buzzfeed	Vice	MSN	Yahoo
US	22%	10%	3%	11%	23%
UK	12%	5%	1%	5%	8%
France	8%*	1%	1%	7%	8%
Germany	6%*	1%	1%	4%	5%
Spain	8%*	1%	1%	9%	8%
Italy	7%*	1%	1%	8%	11%
Ireland	8%	6%	1%	5%	9%
Brazil	2%*	2%	1%	20%	18%
Australia	12%	7%	1%	25%*	21%*
Japan	2%*	1%	-	10%	52%*
Weighted[1]	**10%**	**4%**	**1%**	**8%**	**18%**

Q5b. Which, if any, of the following have you used to access news in the last week? Via online platforms (web, mobile, tablet, e-reader). *Base: Total sample in each country.*

[1] *Weighted percentage calculated using population data from Internet World Stats and the World Bank: weighted = (country population * percentage adults * percentage accessed)/total population of all countries surveyed. Brazil is not included due to the absence of reliable data about its urban population.*

* *Represent joint ventures and some cases (e.g. Australia's NineMSN) where MSN retains the name but has sold the business.*

TOP GLOBAL BRANDS
TRADITIONAL

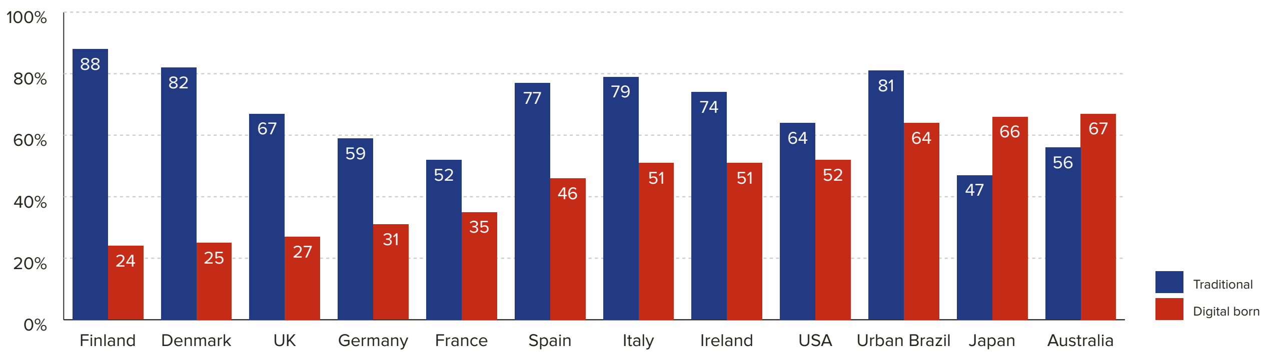
	D Mail	Guardian	NY Times	BBC	CNN
US	3%	4%	12%	10%	14%
UK	14%	12%	1%	48%	1%
France	-	-	1%	3%	2%
Germany	-	-	1%	3%	3%
Spain	-	-	3%	5%	4%
Italy	-	-	2%	3%	4%
Ireland	7%	4%	4%	17%	5%
Brazil	-	-	6%	8%	9%
Australia	3%	7%	4%	14%	7%
Japan	-	-	2%	3%	5%
Weighted[1]	**2%**	**2%**	**5%**	**8%**	**6%**

In domestic online markets we see a continuation of the trend that sees new 'digital born' brands disrupting the dominance of traditional news organisations – especially in Japan, Australia, Brazil, and the US (see the next chart).

In other countries like Denmark, Finland, and the UK, strong newspaper brands and strong public service broadcasters have captured most of the online market, leaving little room for new players.

Australia's position is mainly because of popularity of the Yahoo7 and NineMSN, while Japan's disruption relates chiefly to Yahoo Japan, which has 52% weekly reach with our sample. Brazil has a range of home-grown portals and aggregators as well as strong traditional media companies, while the disruption in the United States is the most diverse, from mature start-ups like Huffington Post (now owned by AOL) to vibrant new start-ups like NowThis and Vox.

DISRUPTION BY DIGITAL BORN PLAYERS
ALL COUNTRIES

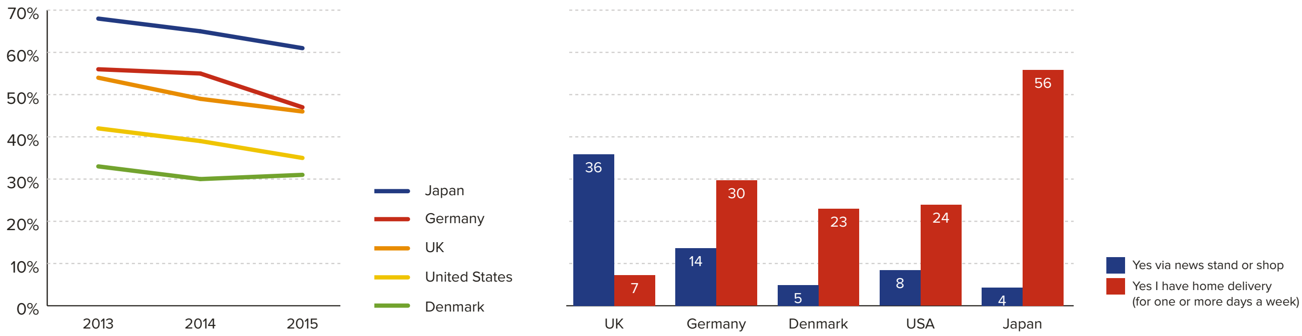


Q5b. Which, if any, of the following have you used to access news in the last week? Via online platforms (web, mobile, tablet, e-reader). *Base: Total sample in each country.*

THE BUSINESS OF JOURNALISM

Sales of printed newspapers have continued to fall in most countries but those with strong home delivery like Japan have been able to weather the storm a little better (see next chart).

SALES OF PRINTED NEWSPAPERS
SELECTED MARKETS



Q7. Have you bought (paid for) a printed newspaper in the last week? (This could be an ongoing subscription or one-off payment for a physical copy.) Please select all that apply. *Base: Total sample 2013–15 UK = 2078/2082/2149, US = 2170/2197/2295, Germany = 1099/2063/1969, Denmark = 1024/2036/2019, Japan = 1004/1973/2017.*

Meanwhile, in our survey we see no discernible trend towards an increase in paid online content – or in willingness to pay. A small number of loyal readers have been persuaded to pay for brands they like but it is proving hard to convert casual readers when there is so much free news available from both commercial media companies and public service media.

These headline numbers do, however, conceal some significant shifts – and a rise in overall revenue.

In the UK, four years ago the majority of payment was small-scale and one-off. Today, almost three-quarters of the total (71%) is for an ongoing subscription (digital only, digital/print, or other combination) meaning that average yearly spend has risen to around £10 a month. This is twice the spend on online news in Spain (€5) where there is a higher level of one-off payment.

See section 3.2 for detailed statistics on Paying for Online News, p. 65.
See Robert G. Picard, 'Business Outlook: Constraints on Growth, But Some Hopeful Signs', p. 92.

PAYMENT FOR ONLINE NEWS
BY COUNTRY

	UK	IRE	GER	FRA	JPN	USA	SPA	AUS	ITA	DEN	FIN
Paying for news	6%	7%	7%	10%	10%	11%	11%	11%	12%	13%	14%

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

AVERAGE SPENDING ON ONLINE NEWS
SELECTED COUNTRIES

	UK	US	AUS	SPA
Average monthly spend	£10	$10	$10	€5
On-going payment	71%	67%	70%	49%

OPTQ7ciii. How much have you paid for online news content, or for access to a paid-for online news service in the last year? **Q7ai.** Which if any, of the following ways have you used to pay for ONLINE news content in the last year? *Base: All who paid to access online news in the past year, and all who specified what types of payment they made (excluding those who did not know) UK = 87, US = 199, Australia = 177, Spain = 181.*

A key focus for the industry over the past year has been to try to get more people – especially younger people – subscribing to content but there has been limited success.

The *New York Times* launched a number of spin-off paid apps, including NYT Now and Opinion in April 2014, but the Opinion app was shelved and the NYT Now one did not attract the numbers or demographics initially hoped for and will become a free service.[7]

Specific questions we asked in four markets shows that very few of those not already paying would be prepared to pay anything for online news. The rest would pay only a small amount.

FUTURE LIKELIHOOD TO PAY
SELECTED COUNTRIES

UK	US	Spain	Australia
75% wouldn't pay whatever the price	**67%** wouldn't pay whatever the price	**59%** wouldn't pay whatever the price	**63%** wouldn't pay whatever the price
Average **£4.50 a year**	**Average** **$8.50 a year**	**Average** **€4.50 a year**	**Average** **AUS$4.50 a year**

Q7civ. What is the maximum price you would pay for a subscription to a digital-only news service – including full access to its website, apps, and any digital replicas of the newspaper? *Base: All who had not paid for news in the last year UK = 1992, US = 1942, Spain = 1773, Australia = 1805.*

AD-BLOCKING, NATIVE ADVERTISING, AND SPONSORED CONTENT

If the move to paid content remains difficult, online advertising – banner advertising in particular – is going through something of an existential crisis. Revenue from display ads has continued to fall, accidental clicks are up with the move to mobile (fat fingers), and there is industry concern about fraud and a lack of transparency.

Our research shows that consumers are voting with their feet as they get bombarded with more and more intrusive advertising online. 47% of our US sample and 39% in the UK don't see always see ads because they use ad-blocking software to screen them out. More generally, a third or more (39% in the UK and 30% in the US) say they ignore ads. Around three in ten (31%/29%) say they actively avoid sites where ads interfere with the content.

Against this background, it is not surprising that many publishers are abandoning the old models in favour of new 'native' advertising or sponsored content. Buzzfeed, Vox, and Vice are leading the charge, with the *New York Times*, *Washington Post,* and *Guardian* amongst traditional news organisations setting up creative teams to work on editorial content with brands. It is a complex area with many different variants of native advertising emerging. There are few standards on labelling or common agreement on best practice.

REGULARLY USE AD-BLOCKING SOFTWARE

US **47%** UK **39%**

The area is particularly controversial in the industry because it tends to blur the line between editorial and advertising.

This year we have conducted qualitative and quantitative research into consumer attitudes towards sponsored content and native advertising in both the UK and US. The main headlines are:

- A third or more say they have felt disappointed or deceived after reading an article they later found had been sponsored.
- Half say they don't like sponsored content but accept this is part of how they get free news.
- Over a quarter feel less positively about the news brand as a result of sponsored content or native advertising.

See Shaun Austin and Nic Newman, 'Attitudes to Sponsored and Branded Content', p. 101.

[7] www.bloomberg.com/news/articles/2015-04-15/nyt-makes-now-app-free-scrapping-monthly-fee-to-attract-readers

CONCLUSIONS

This year's survey underlines both the pace of change but also the increasing complexity of our media ecosystem. New global brands are emerging, there are new platforms for distributing and monetising the news, new devices for accessing it, and new formats to tell stories.

All of this is part of a fundamental shift away from the broadcast models of the past to ones where it is possible to deliver more relevant, more personal, more interactive news at any time and in any place.

And yet while our data suggest that this is becoming a reality for some, there are still many who continue to value traditional approaches. Most people still get their news from a combination of TV, radio, print, and online. Traditional news brands continue to dominate online in almost all the countries we studied, even if intermediaries are becoming far more important as a way of getting to those brands. It is also worth noting that even amongst our online sample about two in ten do not use internet news regularly (relying instead on broadcast and print). About one in three smartphone users do not use their phone for news, and around one in three Facebook users do not see social media as a source of news.

The reality is that most people over 45 are using digital news as an additional layer of choice and convenience without abandoning their core habits around television, radio, and print. Younger audiences who have grown up with digital are exhibiting very different behaviours and increasingly expect the news to come to them through online channels and in new formats.

The challenge for traditional media brands is how to manage this growing divergence in behaviour, along with the intense business pressures being thrown up by the second wave of disruption from mobile and social.

Print revenues are declining fast while only a minority is prepared to pay for news online. Mobile advertising is generating less than via desktop, video advertising is promising but nascent, while sponsorship and native options are throwing up new questions around trust and journalistic integrity.

Meanwhile Facebook and Google continue to build some of the world's most profitable companies based on targeted advertising wrapped around relevant and interesting content.

Against this backdrop, news companies face another year of intense pressure and will have to be more inventive than ever with editorial and business strategies if they are to survive.

1 ANALYSIS BY COUNTRY

In this section we publish the detailed data tables from our 2015 survey. We start with a country-based view of the findings, which includes a brief overview of media characteristics and the most important data points in terms of digital news.

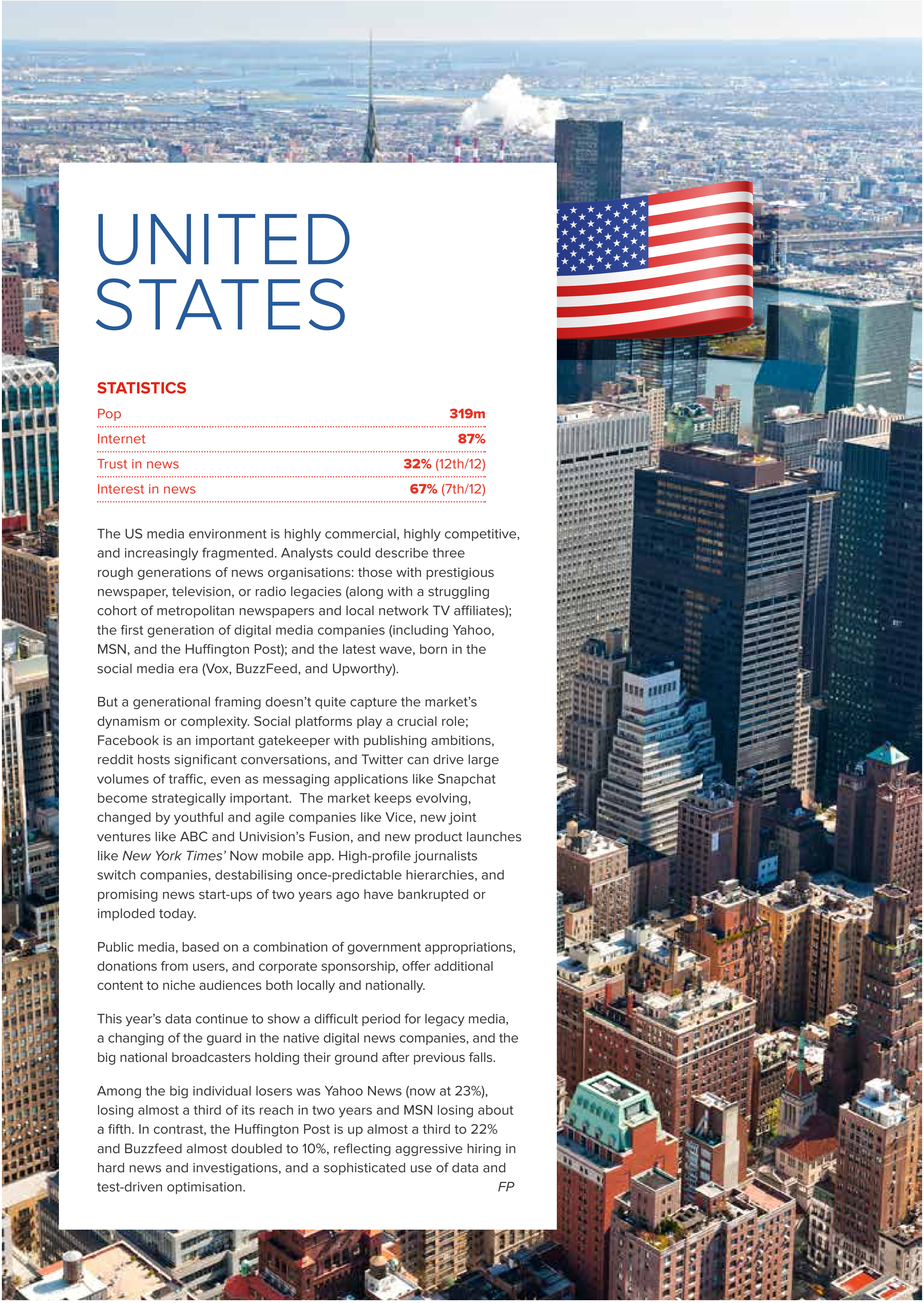
This includes an overview of consumption in each country, including details of the most popular news brands – traditional and online. The pages also contain statistics about the use of new devices such as smartphones and tablets and the role of different social networks for news. All information is drawn from the 2015 *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* (2014).

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

Figures around digital and cross-platform reach are derived from tagging of a list of specific news sources (online and offline) – around 40 per country. This method will tend to under-report the long tail of sources.

In subsequent sections, we explore the key parts of our survey illustrated by more detailed charts and tables – alongside commentary to explain their significance.

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



UNITED STATES

STATISTICS

Pop	**319m**
Internet	**87%**
Trust in news	**32%** (12th/12)
Interest in news	**67%** (7th/12)

The US media environment is highly commercial, highly competitive, and increasingly fragmented. Analysts could describe three rough generations of news organisations: those with prestigious newspaper, television, or radio legacies (along with a struggling cohort of metropolitan newspapers and local network TV affiliates); the first generation of digital media companies (including Yahoo, MSN, and the Huffington Post); and the latest wave, born in the social media era (Vox, BuzzFeed, and Upworthy).

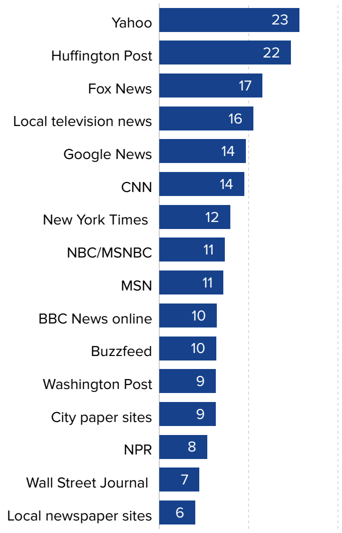
But a generational framing doesn't quite capture the market's dynamism or complexity. Social platforms play a crucial role; Facebook is an important gatekeeper with publishing ambitions, reddit hosts significant conversations, and Twitter can drive large volumes of traffic, even as messaging applications like Snapchat become strategically important. The market keeps evolving, changed by youthful and agile companies like Vice, new joint ventures like ABC and Univision's Fusion, and new product launches like *New York Times'* Now mobile app. High-profile journalists switch companies, destabilising once-predictable hierarchies, and promising news start-ups of two years ago have bankrupted or imploded today.

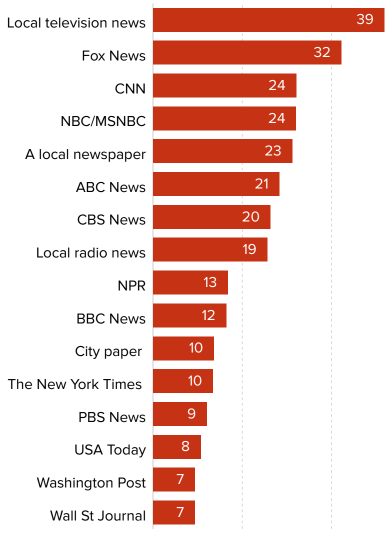
Public media, based on a combination of government appropriations, donations from users, and corporate sponsorship, offer additional content to niche audiences both locally and nationally.

This year's data continue to show a difficult period for legacy media, a changing of the guard in the native digital news companies, and the big national broadcasters holding their ground after previous falls.

Among the big individual losers was Yahoo News (now at 23%), losing almost a third of its reach in two years and MSN losing about a fifth. In contrast, the Huffington Post is up almost a third to 22% and Buzzfeed almost doubled to 10%, reflecting aggressive hiring in hard news and investigations, and a sophisticated use of data and test-driven optimisation. *FP*

TOP BRANDS
% WEEKLY USAGE





DIGITAL REACH

Newspapers	**35%**
Broadcasters	**53%**
Pure players	**52%**

CROSS PLATFORM REACH

Newspapers	**56%**
Broadcasters	**88%**

TRADITIONAL (OFFLINE) REACH

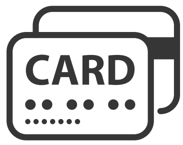
Newspapers	**45%**
Broadcasters	**82%**

There aren't many people paying for news in the US, almost no overall growth, and very little easy money left on the table. Despite major newspaper companies touting more subscriptions in their annual reports (the *New York Times* has over 800,000 digital subs) this survey shows virtually no increase in total news payers since 2013. The remaining non-payers overwhelmingly believe they would never pay, or pay only a small amount – a mean yearly figure of $8. In this environment the newspaper companies advertise aggressively and widely offer discounts. That is the context for the boom in native advertising examined in detail later in this report.

11%
pay for online news last year
(=5th /12)

TOP DIGITAL SUBSCRIPTIONS

Local/City Newspaper
New York Times
Wall Street Journal

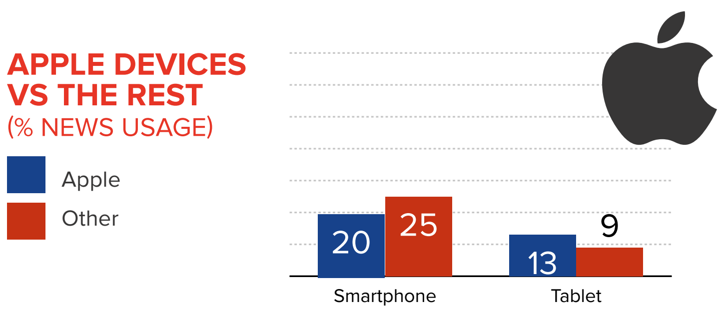


TOP SOCIAL NETWORKS*

Facebook	**40%**
YouTube	**16%**
Twitter	**11%**
Google+	**5%**
Reddit	**4%**

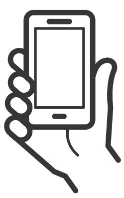
**used weekly for news*

APPLE DEVICES VS THE REST
(% NEWS USAGE)



DIGITAL PARTICIPATION

32% share a news story via email or social media. US is = **4th out of 12** in overall participation index.



26%
say the smartphone is the main way of accessing online news

10%
say the tablet is the main way of accessing online news

UNITED KINGDOM

STATISTICS

Pop	**64m**
Internet	**90%**
Trust in news	**51%** (5th/12)
Interest in news	**70%** (6th/12)

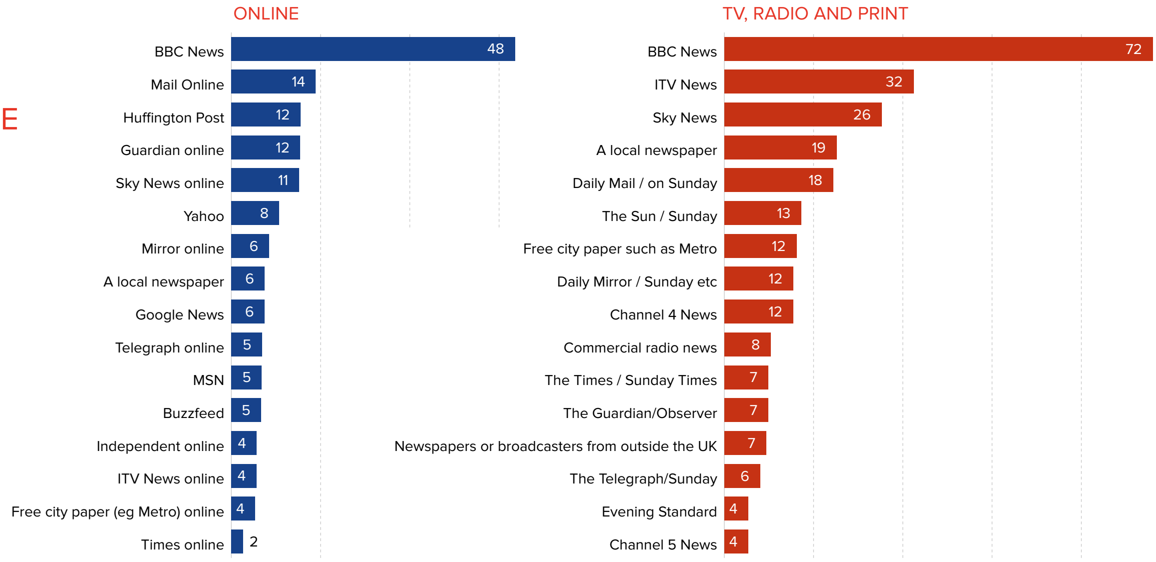
The media environment is characterised by a vigorous and highly competitive national press – including a strong tabloid sector. BBC News reaches more than three-quarters of all consumers each week across radio, TV, and online. The *Daily Mail* and the *Guardian* have invested heavily in digital and have had success taking UK journalism to international audiences.

The BBC continues to dominate online news usage in the UK on all devices. Half of smartphone news users (51%) regularly use the BBC News app and partly as a result apps are more heavily used in the UK than elsewhere. BBC apps were relaunched in early 2015 as part of a major new initiative around personalisation. The *Guardian* has revamped its website and mobile offerings, introduced a membership scheme, developed a branded content studio, and expanded paid events. It continues to win awards for digital innovation – but faces a year of transition with a new editor and chief executive.

Both the *Daily Telegraph* and *Daily Mail* have moved further into sponsored and branded content (so-called native advertising) amid a row (and one resignation) at the *Telegraph* over the blurring of the line between editorial and advertising. Meanwhile Buzzfeed UK and the Huffington Post have been hiring investigative reporters and developing long-form journalism.

News UK operates hard paywalls for both the *Sun* and *The Times*. As a result both have sacrificed online reach for profitability and engagement. *The Times* and *Sunday Times* have reported over 170,000 digital subscribers (+12%) and an unexpected rise in print sales. The *Financial Times* has surprisingly abandoned its much-lauded metered approach in favour of a hard paywall with low-cost trials. Local newspaper groups like Johnston Press and Trinity Mirror continue to struggle but digital advertising revenues are up. *NN*

TOP BRANDS
% WEEKLY USAGE



DIGITAL REACH

Newspapers	**39%**
Broadcasters	**54%**
Pure players	**27%**

CROSS PLATFORM REACH

Newspapers	**73%**
Broadcasters	**88%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**63%**
Broadcasters	**83%**

TOP SOCIAL NETWORKS*

Facebook	**29%**
Twitter	**14%**
YouTube	**7%**
Google+	**3%**
WhatsApp	**3%**

**used weekly for news*

Facebook is most important for referrals to news sites overall but Twitter is widely used by journalists and politicians and is where news is found first. Social media played a significant role in the Scottish Referendum in September 2014, with those supporting independence much more likely to participate online. WhatsApp and Snapchat are fast growing networks for the young but are still only marginally used for news.

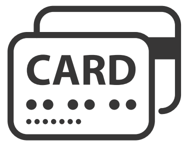
6%

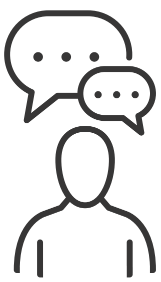
pay for online news last year

(12th /12)

TOP DIGITAL SUBSCRIPTIONS

Times
Economist
Telegraph
Sun

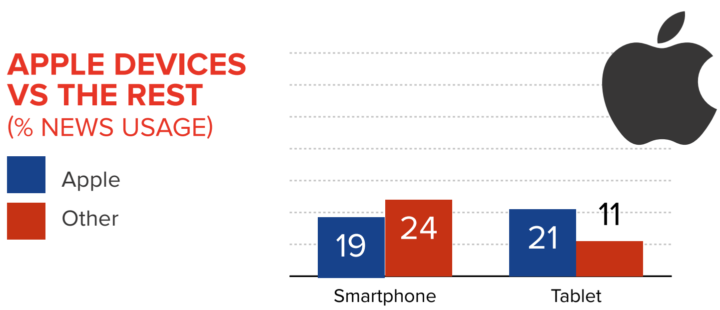


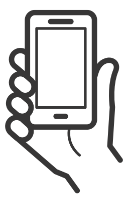


DIGITAL PARTICIPATION

19% share a news story via email or social media. UK is = **10th out of 12** in overall participation index.

APPLE DEVICES VS THE REST
(% NEWS USAGE)



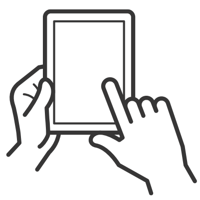


27%

say the smartphone is the main way of accessing online news

18%

say the tablet is the main way of accessing online news



TOP NEWS APPS
(ON SMARTPHONE)

1. BBC News	**51%**
2. Sky News	**13%**
3. Mail Online	**11%**

GERMANY

STATISTICS

Pop	**81m**
Internet	**89%**
Trust in the news	**60%** (3rd/12)
Interest in news	**74%** (=3rd/12)

The country's federal structure has shaped its media environment, with a number of regional and national public broadcasters competing for audiences with powerful commercial operators. The press market is strongest at a regional level with over 300 titles. Each of the 16 regions also regulates its own private and public broadcasting.

Evening television news shows in Germany such as ARD's *Tagesschau* and ZDF's *Heute* continue to pull in the biggest audiences in Europe. But these PSBs continue to face restrictions to their online news services under pressure from newspaper groups.

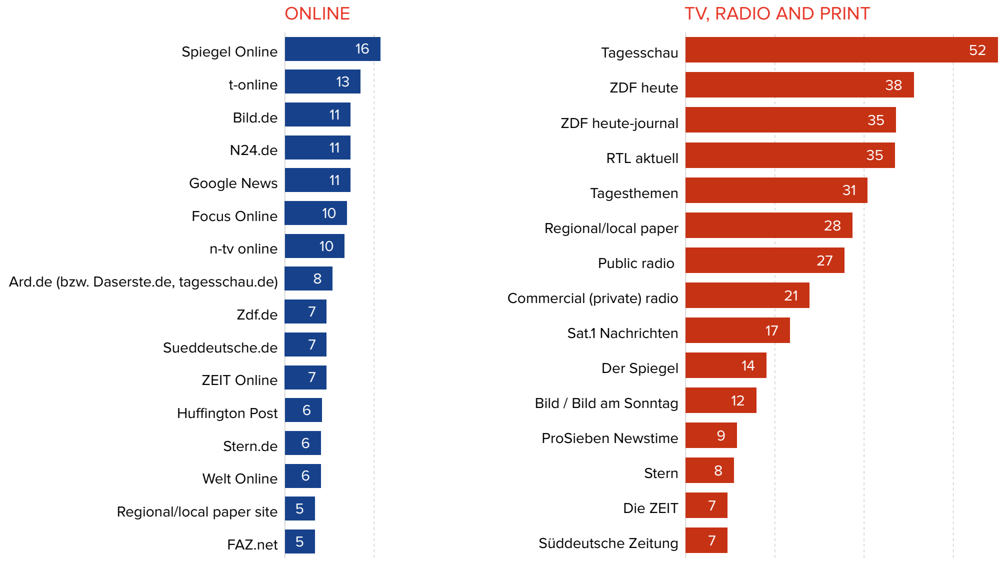
With sales of daily newspapers and magazines continuing to fall, publishers are pursuing different strategies for the transition to online business models. Axel Springer, which publishes best-selling tabloid *Bild* and national daily *Die Welt*, is partly betting on the success of paid content to reduce the company's dependence on advertising. The company announced more than 250,000 paying subscribers for its premium Bild+ services in January 2015 (up from 153,000 in December 2013). Burda Media, on the other hand, which publishes influential weekly magazine *Focus*, continues to focus on paid e-papers and tablet editions but has doubts about the viability of paywalls. Springer has also been diversifying with recent investments in the European expansion of Business Insider and Politico and also in Blendle, a Dutch start-up where readers pay by the article.

German publishers have been at the heart of European demands that Google start paying for content. But when a new law led to news snippets being left out of search results, news publishers were forced to request readmission, after traffic from Google and Google News fell by 40% and 80%.[8]

UH and SH

[8] www.reuters.com/article/2014/11/05/us-google-axel-sprngr-idUSKBN0IP1YT20141105

TOP BRANDS
% WEEKLY USAGE



DIGITAL REACH

Newspapers	**45%**
Broadcasters	**35%**
Pure players	**31%**

CROSS PLATFORM REACH

Newspapers	**74%**
Broadcasters	**90%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**64%**
Broadcasters	**87%**

TOP SOCIAL NETWORKS*

Facebook	**23%**
YouTube	**13%**
WhatsApp	**9%**
Google+	**6%**
Twitter	**4%**

**used weekly for news*

Germans are less interested in news-related participation via social media than people in other countries. Facebook is still the biggest network for news while Twitter attracts media coverage but has struggled to appeal to the wider public. WhatsApp has been growing fast in Germany over the last few years and some local newspapers have been experimenting with it for distributing their stories.

7%

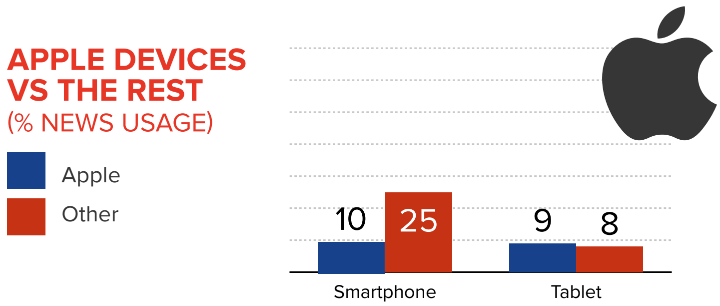
pay for online news last year

(=10th /12)

WEEKLY MULTMEDIA USAGE

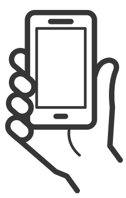
News Video	**18%**
News Audio	**8%**

APPLE DEVICES VS THE REST
(% NEWS USAGE)



DIGITAL PARTICIPATION

19% share a news story via email or social media. Germany is = **10th out of 12** in overall participation index.



22%

say the smartphone is the main way of accessing online news

9%

say the tablet is the main way of accessing online news

TOP NEWS APPS
(ON SMARTPHONE)

Spiegel Online	**15%**
n-tv online	**12%**
N24.de	**10%**
Focus.de	**9%**

FRANCE

STATISTICS

Pop	**66m**
Internet	**83%**
Trust in the news	**38%** (9th/12)
Interest in news	**59%** (12th/12)

Television news remains popular, with viewership split between France Télévisions, privately owned TF1, and a range of cable and satellite providers. France's long-established commercial radio, particularly RTL and Europe 1, still command large audiences, along with a range of publicly funded stations such as France Inter, France Info, and France Culture.

The newspaper sector is particularly weak and remains partly dependent on state subsidies amidst falling sales and advertising revenue. Even so, France still has more than 80 daily newspapers, mostly in private hands and not linked to political parties. The most successful papers are often regional rather than national.

Online, many of the best known national titles, such as *Le Monde* and *Le Figaro,* face competition from digital-born media and also from broadcasters.

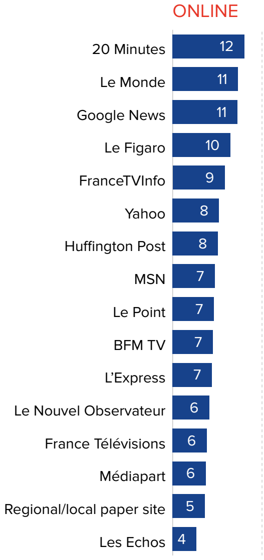
Among French pure players, Mediapart is the most successful, with 112,000 subscribers for its mix of online investigation and opinion. Mediapart reported profits in March 2015 of €1.5m on a turnover of €8.8m. Another start-up Lesjours.fr will launch a paid edition later in 2015 staffed by former editors and writers from *Libération*. It hopes to attract 25,000 subscribers within three years.

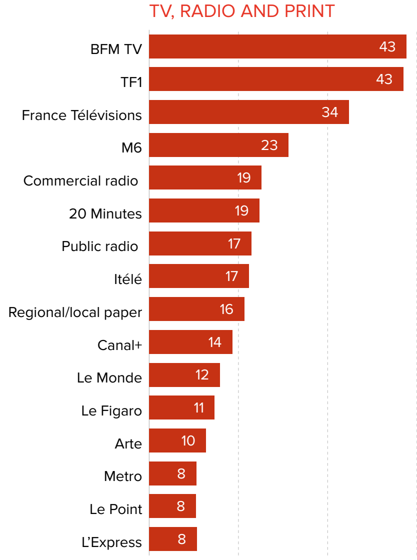
Le Huffington Post, a joint venture with *Le Monde*, has been gaining ground steadily (up 3 to 8%) and is funded by advertising and sponsored content – while Buzzfeed, which launched a French edition in 2013, has made strong gains with under 25s.

Google remains a major player in France, with Google News a significant destination (11%). French publishers settled a row with the search giant in 2013, accepting an offer of a $60 million innovation fund. Early results are now emerging, including new apps and initiatives around paying for news. €250,000 was earmarked to support the *Charlie Hebdo* magazine following January's shootings.

AL and NN

TOP BRANDS
% WEEKLY USAGE





DIGITAL REACH

Newspapers	**37%**
Broadcasters	**32%**
Pure players	**35%**

CROSS PLATFORM REACH

Newspapers	**68%**
Broadcasters	**89%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**59%**
Broadcasters	**85%**

TOP SOCIAL NETWORKS*

Facebook	**35%**
YouTube	**22%**
Google+	**8%**
Twitter	**8%**
Dailymotion	**4%**

**used weekly for news*

10%
pay for online news last year
(=8th /12)

NEWS

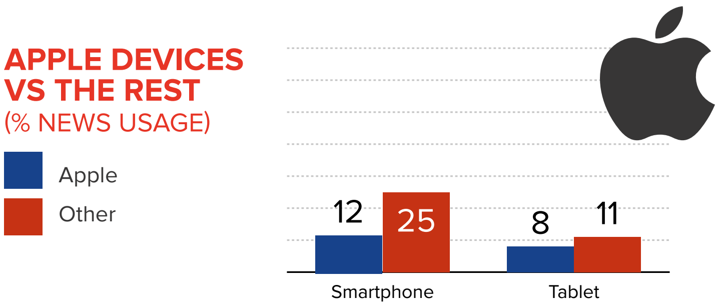
TOP DIGITAL SUBSCRIPTIONS[9]

Le Monde
Les Echos (business daily)
Le Figaro

CARD

Social media helped galvanise reaction to the January *Charlie Hebdo* shootings with #jesuischarlie trending not only in France but also around the world. Videos of the killings and aftermath were widely circulated on YouTube and another popular (French-born) social platform Dailymotion. As a result we have seen significant increase in news participation online over the past year.

APPLE DEVICES VS THE REST
(% NEWS USAGE)



DIGITAL PARTICIPATION

26% share a news story via email or social media. France is **8th out of 12** in overall participation index.

25%
say the smartphone is the main way of accessing online news

8%
say the tablet is the main way of accessing online news

[9] *Le Monde* and *Le Figaro* each sell around 300,000 print copies per day but digitally only 47,000 and 21,000 respectively presseettablette.com/2015/04/03/le-monde-et-les-echos-les-journaux-qui-vendent-le-plus-deditions-numeriques.

SPAIN

STATISTICS

Pop	**46.5m**
Internet	**75%**
Trust in the news	**34%** (11th/12)
Interest in news	**85%** (1st/12)

Circulation of Spanish newspapers continues to shrink, leaving many dependent on government advertising and a few major businesses. Last year, *El País* lost 11% of sales in print, and *El Mundo* 13%. Freesheet *20 minutos* is available in print in the biggest cities, and it acts as a purely online brand elsewhere. Regional and local newspapers remained moderately healthy, but many still have to catch up online. Television channel La Sexta, with a broad range of news and current affairs programmes, shows the biggest increase among traditional media, while Cadena SER is the leading radio network online and offline.

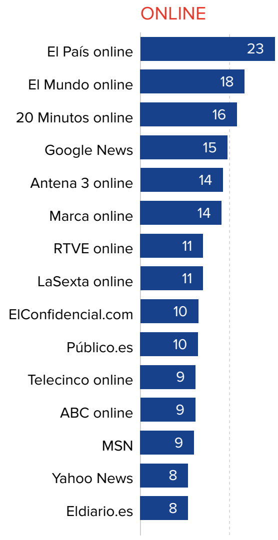
Online, pure-players gained ground in the last year at the expense of traditional newspapers. *El Confidencial* – now profitable – is the most read online-only newspaper in Spain, followed by *Público.es*, which carries the brand of a print daily that ceased publication in 2012. News start-up, *Eldiario.es*, reached break-even early and keeps growing with an extensive network of collaborators and partnerships. But *El País* and *El Mundo* continue to be the papers of record in Spain, both offline and online, where they attract audiences three times the size of even the most successful digital-born companies.

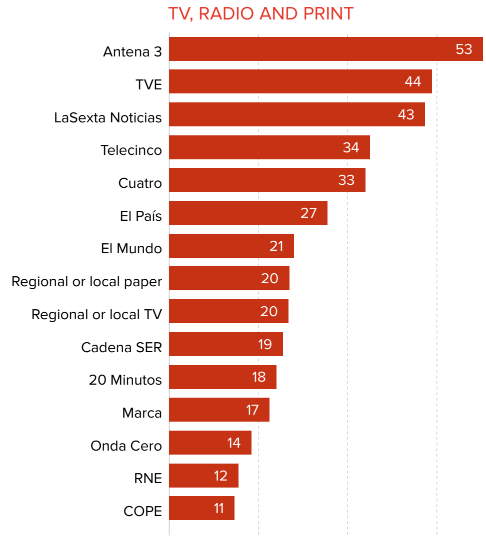
Apart from digital newsstands, most publishers continued to keep their online content ad-supported and free for all, with *El Mundo* operating a generous metered paywall. Digital-born media have experimented with crowdfunding and reader-shareholder schemes and some have promoted memberships and donations in order to reduce dependence on advertisers.

The Spanish Google News portal was removed in December 2014 in response to a state law that intended to tax the service, driven by the newspaper publishing lobby. Google Search still displays 'In the news' results and a 'News' tab for specific queries, with a limited selection of stories, which is why it is still showing at 15%.

SN, AV and AA

TOP BRANDS
% WEEKLY USAGE





DIGITAL REACH

Newspapers	60%
Broadcasters	48%
Pure players	46%

CROSS PLATFORM REACH

Newspapers	79%
Broadcasters	94%

TRADITIONAL (OFFLINE) REACH

Newspapers	68%
Broadcasters	93%

TOP SOCIAL NETWORKS*

Facebook	52%
WhatsApp	27%
Twitter	22%
YouTube	22%
Google+	13%

**used weekly for news*

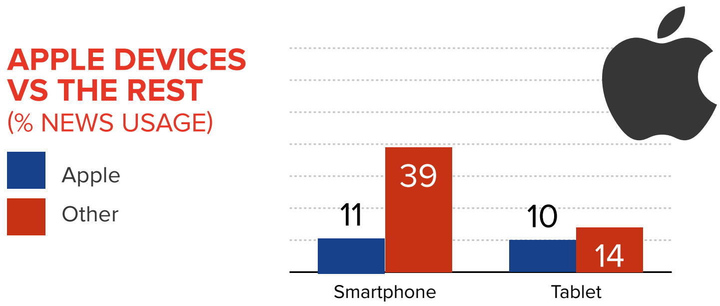
11%
pay for online news last year
(=5th /12)

WEEKLY MULTMEDIA USAGE

News Video	27%
News Audio	17%

The increase in sharing news can be attributed first to the growth in mobile and social consumption, and secondly to intense public interest in the turbulent political issues in Spain. Television, though, remains a key driver of debate, with Podemos and Ciudadanos as new political actors. Current affairs programmes in particular are widely discussed on social media.

APPLE DEVICES VS THE REST
(% NEWS USAGE)



DIGITAL PARTICIPATION

45% share a news story via email or social media. Spain is **2nd out of 12** in overall participation index.

24% say the smartphone is the main way of accessing online news

10% say the tablet is the main way of accessing online news

ITALY

STATISTICS

Pop	**61.5m**
Internet	**59%**
Trust in the news	**35%** (10th/12)
Interest in news	**74%** (=3rd/12)

Television remains the main source of news for the bulk of the Italian population. Public broadcaster RAI's news bulletins (TG) are still popular, while all-news TV channels (SKY Tg24, TgCom, RaiNews24) are building a reputation for trusted news.[10]

The Italian press is highly regionalised, reflecting the country's history and character. With almost half of the population (47%) never reading a newspaper,[11] print readership figures continue to be very low compared to other European countries.

The online offer is more diverse, with legacy media outlets such as *La Repubblica* (29%) performing strongly and digital-born players still fighting to find an adequate audience and sustainable business models. With mobile internet booming in Italy, media habits are changing fast. Many news websites are slightly decreasing in popularity, while more people use social media and mobile apps to access and share news.

Newspaper readership is continuing to decline and for the most part digital subscriptions are not balancing out the loss of print copies. Several national papers have shut down (including the eminent *L'Unità*, launched in 1924 by Antonio Gramsci) and newsrooms have continued to shrink: in the last 10 years, daily papers have lost around 30% of their journalistic workforce.[12]

Despite these problems, paywalls are still not common in Italian online media outlets which continue to rely on free news subsidised by advertising. Native advertising formats have been introduced on most sites, but often with no clear policies to distinguish them from editorial content.

NB

10 According to data by Demos 2014 (www.demos.it/a01071.php).

11 According to data by Censis 2014 (www.censis.it/7?shadow_comunicato_stampa=120995).

12 According to data by Alessandro Nova, Bocconi University, www.fleg.it/upload/studi_allegati/Presentazione_filiera_carta_2015_A.%20Nova_ridotto.

TOP BRANDS
% WEEKLY USAGE

ONLINE

Repubblica.it	29
Google News	22
Ansa	22
Corriere.it	19
TgCom.it	18
Il Fatto Quotidiano.it	16
La Stampa.it	16
Rai.TV	15
Il Sole 24 ore	14
Notizie.Libero.it	11
Yahoo News	11
An online local newspaper	9
BeppeGrillo.it	8
MSN	8
Huffington Post	7
L'Espresso.it	7

TV, RADIO AND PRINT

Tg1, Tg2, Tg3, Tg4, Tg5	61
TgCom24	32
Tg La7	31
RaiNews	30
SkyTg24	25
Ballarò	24
La Repubblica	23
Studio Aperto	23
A local newspaper	22
Il Corriere della Sera	20
Porta a Porta	18
Servizio Pubblico	15
Piazza pulita	14
Il Sole 24 Ore	13
8 e mezzo	12
Gr1, Gr2, Gr3, Gr24	11

DIGITAL REACH

Newspapers	73%
Broadcasters	25%
Pure players	51%

CROSS PLATFORM REACH

Newspapers	82%
Broadcasters	93%

TRADITIONAL (OFFLINE) REACH

Newspapers	58%
Broadcasters	93%

TOP SOCIAL NETWORKS*

Facebook	55%
YouTube	25%
WhatsApp	18%
Google+	11%
Twitter	10%

**used weekly for news*

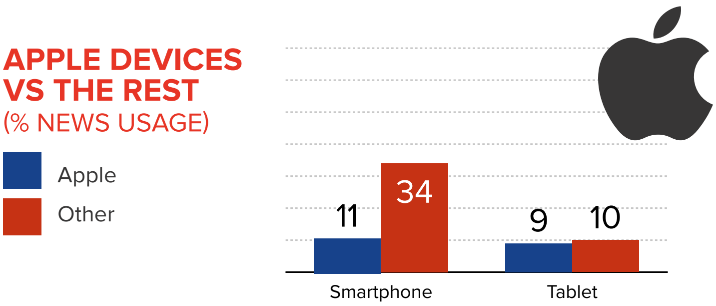
12% pay for online news last year (4th /12)

WEEKLY MULTMEDIA USAGE

News Video	25%
News Audio	14%

The popularity of WhatsApp is growing year by year in Italy, but media outlets are still reluctant to use this channel as a distribution platform – with the exception of *La Repubblica's* newly launched breaking news service (January 2015). According to recent data, the amount of news shared online continues to grow.[13] In the vast majority of cases this happens through Facebook, while Twitter and Google+ continue to play a marginal role.

APPLE DEVICES VS THE REST
(% NEWS USAGE)



DIGITAL PARTICIPATION

39% share a news story via email or social media. Italy is **3rd out of 12** in overall participation index.

24% say the smartphone is the main way of accessing online news

9% say the tablet is the main way of accessing online news

[13] According to a recent report by Human Highway report, the number of shared news items has boomed in the last years (in 2011, 100,000 news items per day were shared; in 2014, more than 400,000), www.slideshare.net/SitoH2/201406-social-new-media-in-italia.

IRELAND

STATISTICS

Pop	**5m**
Internet	**79%**
Trust in the news	**46%** (=6th/12)
Interest in news	**71%** (5th/12)

Ireland's media environment is buoyant and competitive, with new private media launched in the past year particularly in the broadcast sector.

Public service broadcaster RTÉ dominates in both the digital and traditional news markets while Independent News and Media (INM) titles have seen extensive restructuring to meet digital first strategies.

The television sector has seen the most dramatic changes, with new competitors entering the market. UTV Ireland launched in early 2015, while another new channel, Irish TV aimed at the Irish diaspora, launched on Sky channels and was approved for an Irish broadcasting license. TV3 has refocused its efforts on home-grown content.

The media diet is diverse, with national news being the central interest followed by international. In online news, eight of the seventeen most popular brands have a global scope – BBC and Sky being the most prevalent. New online-only news titles such as the Huffington Post (8%) and Buzzfeed (6%) are capturing growing sections of Ireland's digital news market.

Local news shows a lower level of engagement than national news, with 8% engaging digitally and 23% through local newspapers and 15% listening to local radio. Johnston Press Group exited Ireland with the sale of their regional titles. Their competitors at a local level INM also experienced much change with increased competition for advertising from local free sheets and new local websites.

In digital, only one national daily news title, *The Irish Sun*, has moved behind a hard paywall. This was later followed by a very soft paywall from the *Irish Times* aimed at only its most active users. However, the Irish say they are reluctant to pay for online news, while RTÉ as well as INM have committed to offering online content free and expanding across digital platforms. *JS and NK*

TOP BRANDS
% WEEKLY USAGE

ONLINE

Brand	%
RTÉ News online	31
Irish Independent online	28
Irish Times online	23
Journal.ie	23
BBC News online	17
BreakingNews.ie	16
Sky News online	15
Google News	13
Irish Examiner online	10
Yahoo News	9
Mail/Irish Daily Mail online	9
Huffington Post	8
Local or Regional Radio	8
Guardian online	7
Buzzfeed	6
TV3 news online	5

TV, RADIO AND PRINT

Brand	%
RTÉ TV News	58
Sky News	38
Any RTE Radio News	33
BBC News	33
Irish Independent/Sunday/Herald	32
TV3 News	32
Irish Times	25
Any Local Radio News	24
Regional or local newspaper	23
Newstalk/TodayFM News	23
Local or Regional Radio	15
Daily Mirror/ Irish Daily Mail/ Irish Daily Sun	15
Other TV News	13
Any ITV or Channel 4 News	13
UTV Ireland News	11
The Sunday Times	11

DIGITAL REACH

Newspapers	**53%**
Broadcasters	**54%**
Pure players	**51%**

CROSS PLATFORM REACH

Newspapers	**79%**
Broadcasters	**92%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**69%**
Broadcasters	**90%**

TOP SOCIAL NETWORKS*

Facebook	**46%**
YouTube	**18%**
Twitter	**14%**
Google+	**5%**
WhatsApp	**5%**

**used weekly for news*

7%

pay for online news last year

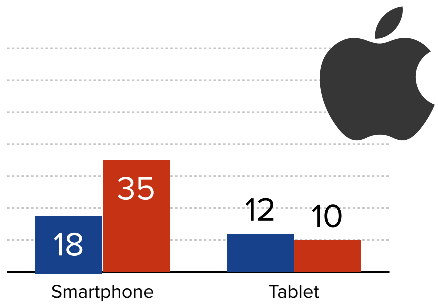
(=10th /12)

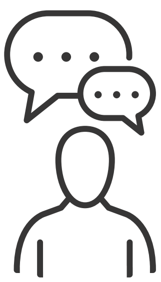
WEEKLY MULTMEDIA USAGE

News Video	**27%**
News Audio	**13%**

Over the past year social media played a central role in the protest campaign against the introduction of water charges. Facebook is Ireland's most popular social network but Irish journalists are some of the heaviest Twitter users in the world according to recent research.[14] While talking among friends is the most common way of engaging with the news, 21% shared news via social media and 19% commented on news in social media.

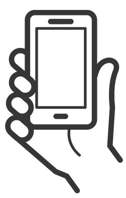
APPLE DEVICES VS THE REST
(% NEWS USAGE)





DIGITAL PARTICIPATION

29% share a news story via email or social media. Ireland is **6th out of 12** in overall participation index.

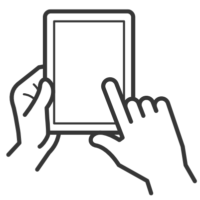


32%

say the smartphone is the main way of accessing online news

7%

say the tablet is the main way of accessing online news



[14] www.irishtimes.com/business/media-and-marketing/irish-journalists-among-world-s-heaviest-social-media-users-study-finds-1.2101471.

DENMARK

STATISTICS

Pop	**5.5m**
Internet	**97%**
Trust in the news	**57%** (4th/12)
Interest in news	**60%** (11th/12)

The Danish media environment is characterised by a combination of strong domestic broadcasters and newspapers. Two state-owned broadcasters, one a licence-fee-funded public service broadcaster (DR), and the other a public service broadcaster funded by advertising sales and subscription fees (TV2), dominate broadcast news and have a wide reach via digital platforms.

A diverse national press has a strong position online while regional and local papers remain important in their respective markets but have more limited digital reach.

While traditional news brands generally remain stable and strong, *metroxpress* (the country's only free daily) shows growth both in print and online editions as a result of investments in newsroom staffing, print circulation, and distribution, and online quality.

The search for more paid customers online remains a key theme for the quality Danish titles. Denmark's oldest newspaper *Berlingske* changed ownership from the British Mecom group to the Belgian De Persgroep. *Berlingske* and commercially funded public service broadcaster TV2 have renewed their deal to exchange business news, strengthening their collaboration.

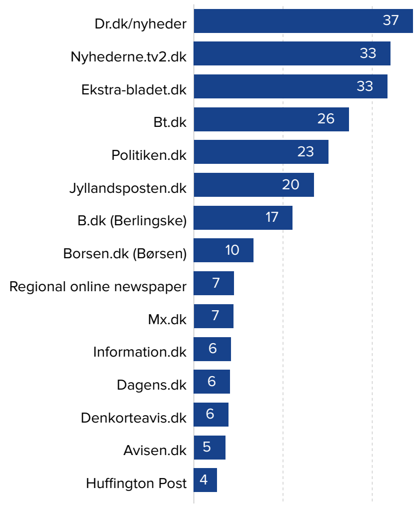
News video consumption has grown significantly in Denmark over the past year (+8 in our survey). Danish news agency, Ritzau, has boosted its supply of video content to the Danish media, while newspapers ramped up online video production. Smartphone and tablet use for news continues to soar, accompanied by increases for born-online pure players and for social media news.

Denmark runs a media subsidy scheme to support news companies that produce more than 50% public affairs content. In 2014 this scheme was extended from print to include online-only news.

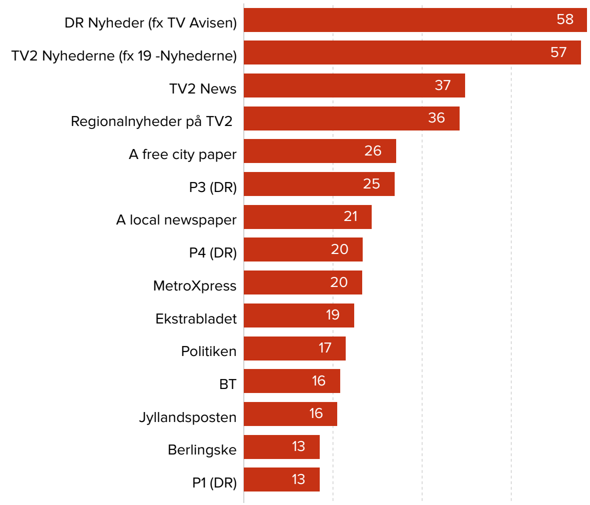
KS

TOP BRANDS
% WEEKLY USAGE

ONLINE



TV, RADIO AND PRINT



DIGITAL REACH

Newspapers	**70%**
Broadcasters	**55%**
Pure players	**25%**

CROSS PLATFORM REACH

Newspapers	**87%**
Broadcasters	**92%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**74%**
Broadcasters	**89%**

TOP SOCIAL NETWORKS*

Facebook	**44%**
YouTube	**8%**
LinkedIn	**6%**
Google+	**5%**
Twitter	**4%**

**used weekly for news*

The number of Danes who say they use social media as a gateway to news has more than doubled to 38%, directing them to a diversity of news sources they would not otherwise have accessed. This may be partly because news organisations have stepped up their presence, investing in new social media teams. Viral news discussions triggered by social media continue to be dominated by fun and weird news, but substantial political stories, for instance about privatisation of public utilities or immigration policy, also top social media charts.

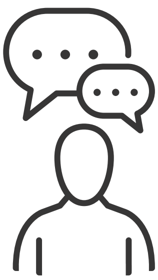
13%

pay for online news last year

(3rd /12)

WEEKLY MULTMEDIA USAGE

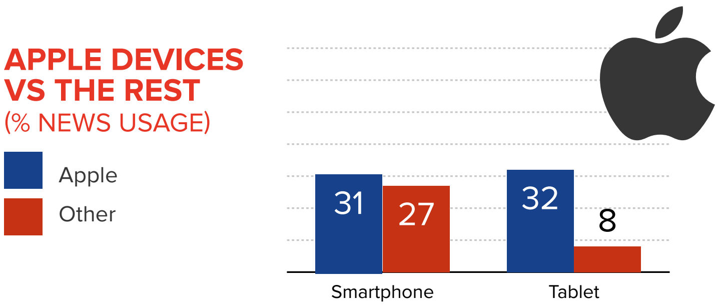
News Video	**18%**
News Audio	**7%**

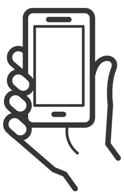


DIGITAL PARTICIPATION

24% share a news story via email or social media. Denmark is **8th out of 12** in overall participation index.

APPLE DEVICES VS THE REST
(% NEWS USAGE)





28%

say the smartphone is the main way of accessing online news

20%

say the tablet is the main way of accessing online news

FINLAND

STATISTICS

Pop	**5m**
Internet	**97%**
Trust in the news	**68%** (1st/12)
Interest in news	**64%** (10th/12)

The Finnish media environment is characterised by a strong regional press. Daily papers are mainly purchased by subscriptions, often covering both print and online editions. The two national afternoon tabloids both reach half of the population weekly (mainly online). Tax-funded public broadcasting company YLE and commercial MTV3 dominate TV news and have a wide reach via digital platforms.

The two afternoon tabloids *Ilta-Sanomat* and *Iltalehti* top online news usage with a mainly free offering but elsewhere the move to paid news is growing. *Helsingin Sanomat*, Finland's best known national daily, has been using a paywall online since 2012, and now half of its subscribers pay for online content, either by bundled subscriptions or pure digital subscriptions.[15]

Some of the regional dailies have already erected paywalls – either metered or freemium. The rest are planning to do so in the near future. The Finnish regional press is also looking to cut costs – creating a new joint venture, Lännen Media, to create shared non-local content for syndication across 12 newspapers.

New initiatives for 2015 include Flou, a personalised app from the Sanoma group which aggregates content from newspapers, TV, and magazines for €12.99 a month. Prejkfast is a home-grown Finnish start-up that is looking to create a widely used micropayment system for newspapers.

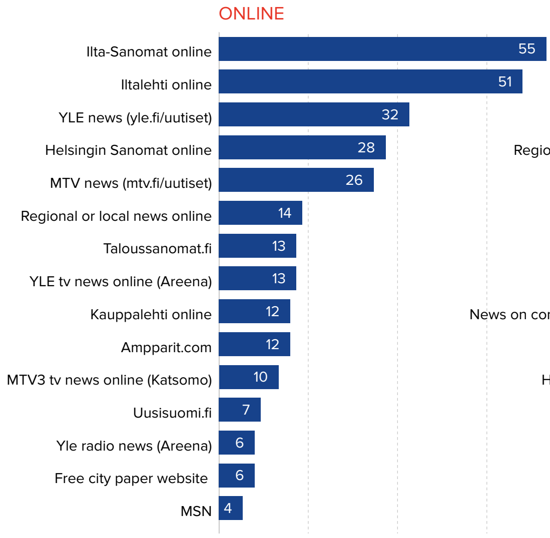
Digital weekly reach is up to 79% for traditional newspapers and 55% for broadcasters – only 24% for pure players. The most popular pure player is a national news aggregator Ampparit. The Finnish language and small market seem to shield national news brands somewhat against international competition.

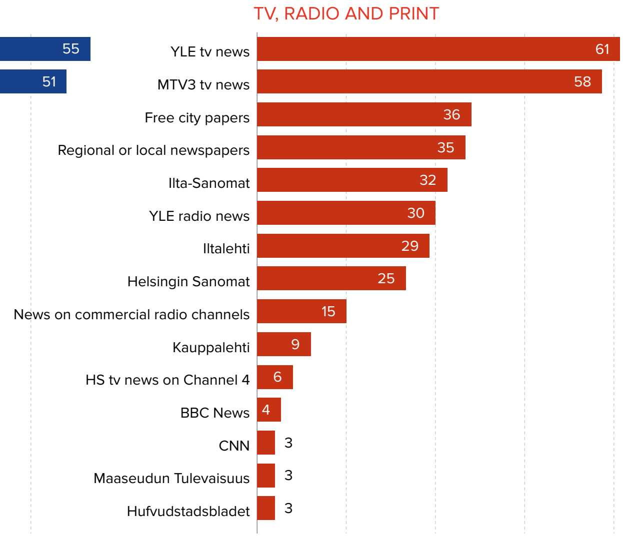
Smartphone use for news has grown considerably. A quarter (24%) say the smartphone is the main way of accessing online news (15% in 2014).

ER

[15] Ongoing subscription for print *Helsingin Sanomat* for one year costs €349/year, bundled €397. Online subscription with all services costs €178.80, and a more restricted online subscription at €118.80. Total circulation is 331,551 (of which only print 51%, bundled 35%, and only digital 14%). Total digital subscriptions are 163,826. This is a significant proportion of digital circulation (242,518) of 17 dailies that took part in a media audit in Finland in 2014 (mediaauditfinland.fi/wp-content/uploads/2015/04/Levikkitilasto2014.pdf).

TOP BRANDS
% WEEKLY USAGE





DIGITAL REACH

Newspapers	**79%**
Broadcasters	**55%**
Pure players	**24%**

CROSS PLATFORM REACH

Newspapers	**93%**
Broadcasters	**88%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**78%**
Broadcasters	**82%**

TOP SOCIAL NETWORKS*

Facebook	**35%**
YouTube	**10%**
Suomi '24'	**7%**
Google+	**5%**
Twitter	**5%**

**used weekly for news*

Facebook has retained its leading position as a top social media platform for news in all age groups. Suomi24, which ranks third, is the most popular general discussion forum in Finland. The use of Google+ seems to be decreasing sharply (now 5% compared to 12% in 2014) while WhatsApp is gaining popularity (weekly use now 4% for news and 32% for any purpose).

14%

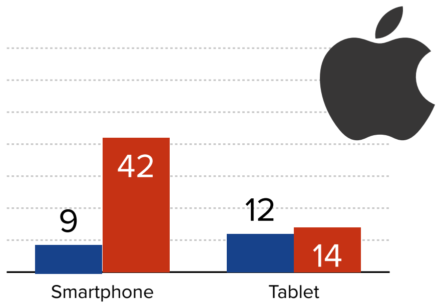
pay for online news last year

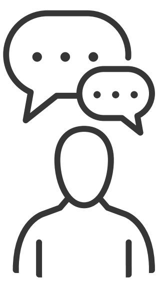
(2nd /12)

WEEKLY MULTMEDIA USAGE

News Video	**22%**
News Audio	**9%**

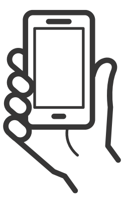
APPLE DEVICES VS THE REST
(% NEWS USAGE)





DIGITAL PARTICIPATION

22% share a news story via email or social media. Finland is **9th out of 12** in overall participation index.



24%

say the smartphone is the main way of accessing online news

11%

say the tablet is the main way of accessing online news

BRAZIL

STATISTICS

Pop	**202.5m***
Internet	**54%**
Trust in the news	**62%** (2nd/12)
Interest in news	**82%** (2nd/12)

South America's biggest media market is home to thousands of radio stations and hundreds of TV channels. Brazilians are among the world's top users of blogs and social networks and use of online is growing fast, attracting foreign outlets such as Buzzfeed, the Spanish newspaper *El País* and the Huffington Post, which launched their Portuguese versions between 2012 and 2013.

Following the downturn in the Brazilian economy, mainstream media have suffered from a series of cuts and layoffs. The debate is the same as in New York or Madrid: how to compensate for the fall in traditional advertising revenue. Among the three big newspapers, *Folha* has been experimenting with television while *Estado de S. Paulo* is testing new models such as sponsored content.

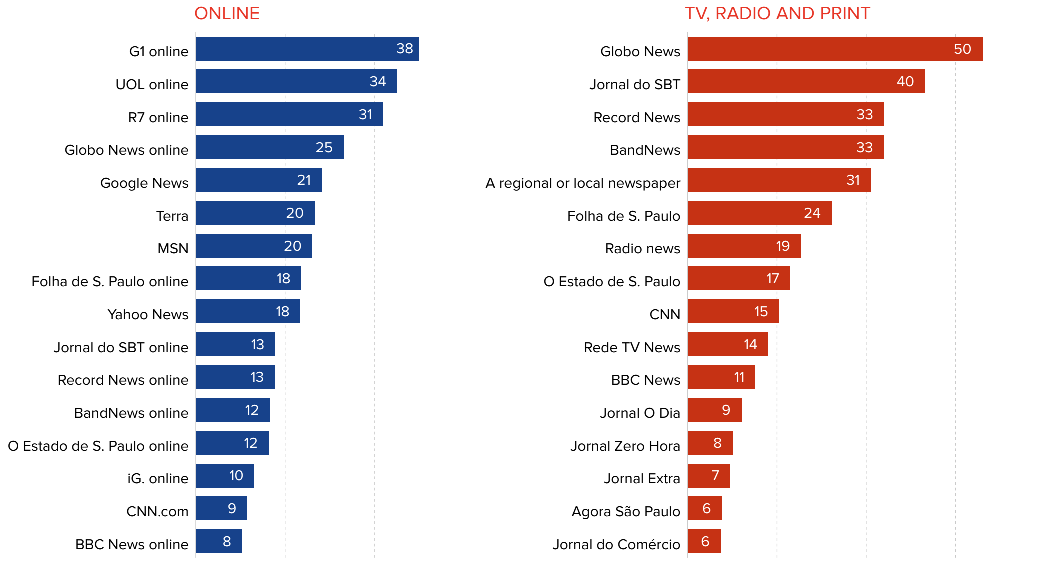
The BBC's strategy of publishing text articles and videos in popular internet hubs UOL and G1, part of the giant Grupo Globo, appears to be paying off, with a solid 8% online reach in our survey.

As in some other parts of the world, tablets have reached their peak in Brazil and are being replaced by cheaper cellphones with large screens that can do almost the same.

2014 was the year of the WhatsApp– or *ZapZap* as it is known in Brazil. News organisations like *El País* actively encourage sharing with the tool while radio stations have been using accounts to build a collaborative network sharing information about traffic jams in São Paulo. WhatsApp is cheap in comparison with normal phone rates, which explains its rapid growth. *FM*

* NB our data come from urban Brazil – rather than a nationally representative sample – and so represent richer and more connected users rather than the general population.

TOP BRANDS
% WEEKLY USAGE



DIGITAL REACH

Newspapers	**46%**
Broadcasters	**72%**
Pure players	**64%**

CROSS PLATFORM REACH

Newspapers	**73%**
Broadcasters	**91%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**66%**
Broadcasters	**83%**

TOP SOCIAL NETWORKS*

Facebook	**70%**
YouTube	**34%**
WhatsApp	**34%**
Google+	**15%**
Twitter	**15%**

**used weekly for news*

Participation online increased markedly during the recent elections and economic crisis and can be linked to a highly political and polarised public.[16] Facebook, Twitter, and Instagram feeds were flooded with election-related videos, parodies, and memes – in addition to discussion and sharing via WhatsApp. Brazil's Facebook community is the world's second biggest outside the US. Google's Orkut – once the top network in the country – closed down in September.

23%

pay for online news last year

(1st /12)

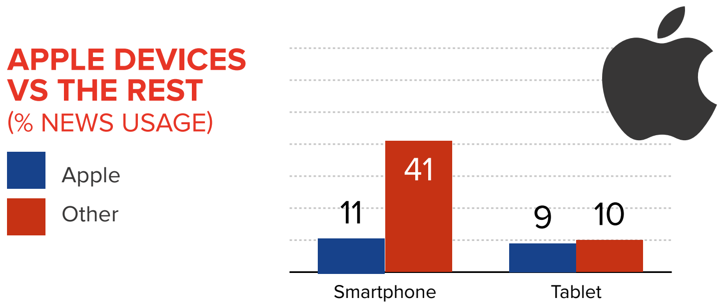
WEEKLY MULTMEDIA USAGE

News Video	**26%**
News Audio	**17%**

DIGITAL PARTICIPATION

59% share a news story via email or social media. Brazil is **1st out of 12** in overall participation index.

APPLE DEVICES VS THE REST
(% NEWS USAGE)



23%

say the smartphone is the main way of accessing online news

6%

say the tablet is the main way of accessing online news

[16] blogs.ft.com/beyond-brics/2014/11/04/brazils-election-as-polarised-as-can-be.

JAPAN

STATISTICS

Pop	**127m**
Internet	**86%**
Trust in the news	**46%** (=6th/12)
Interest in news	**66%** (8th/12)

There are five national terrestrial TV networks in Japan, amongst which NHK is publicly funded and runs national radio networks. Japan's newspaper industry continues to buck trends with around 45 million copies still printed daily – delivering to more than 8 in 10 households. Print is still highly profitable, which means that the shift to digital is taking longer.

Smartphone penetration is growing, but is lower than in other developed countries – as older generations stick with feature phones and once dominant services like iMode.

2014 was the year of mobile news apps. Downloaded by millions, they are taking readers from browser-based news aggregators like Yahoo News – the dominant digital news service in Japan for more than a decade.

Smart News, Gunosy, Newspics and Antenna grew significantly off the back of slick new interfaces that present news from multiple publishers. Aggregators of all sorts – including Yahoo, Google News and MSN – are the primary gateways to news content in Japan as newspapers have given away parts of their content in return for click-throughs.

Change is in the air though, with print papers experiencing the largest drop ever in total circulation by 3.5%. *Nikkei* (Japan Economic Daily) is leading efforts to transition paying customers to digital, with 380,000 paying subscribers, and *Asahi Shinbun* has 160,000 – though the figures remain a tiny proportion of their print circulation.

Newspapers suffered a disturbing period editorially with *Asahi Shimbun* forced to retract stories on 'Comfort Women' in the Second World War and the Fukushima nuclear disaster. Its conservative rivals lambasted *Asahi*, while media critics deplored both camps. *YS*

TOP BRANDS
% WEEKLY USAGE

ONLINE

Brand	%
Yahoo News	52
NHK News	15
Nikkei.com	12
Google News	12
MSN	10
Asahi News	9
Nippon TV & Affiliates	9
Fuji TV & affiliates	9
Asahi TV & affiliates	8
Yomiuri online	8
TBS & affiliates	7
Sankei News	7
SmartNews	7
Mainichi Shimbun	6
Commercial Radio stations' news	5
TV Tokyo & affiliates	5

TV, RADIO AND PRINT

Brand	%
NHK News	49
TV Asashi and its affliates' news	35
Nippon TV and its affliates' news	34
TBS and its affliates' news	32
Fuji TV and its affliates' news	32
A local newspaper	26
Yomiuri Shimbun	17
Asahi Shimbun	16
TV Tokyo and its affliates' news	15
Nihon Keizai Shimbun; Japan Economic Daily	15
Commercial Radio news	10
CNN	6
Mainichi Shimbun	6
Sankei Shimbun	6
BBC News	4
Nikkan Sports	2

DIGITAL REACH

Newspapers	**32%**
Broadcasters	**30%**
Pure players	**66%**

CROSS PLATFORM REACH

Newspapers	**70%**
Broadcasters	**77%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**63%**
Broadcasters	**74%**

TOP SOCIAL NETWORKS*

YouTube	**20%**
Twitter	**12%**
Facebook	**11%**
Line	**7%**
Google+	**5%**

**used weekly for news*

Low online participation reflects Japanese people's overall reluctance to speak about politics and social issues publicly. They also prefer anonymity online, with research[17] showing more than 75% of respondents have a Twitter account without their real name, while in five other countries (US, UK, France, South Korea, Singapore) the proportion is 31–45%. This could explain the lower popularity of Facebook in Japan.

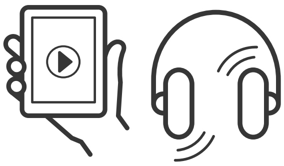
10%

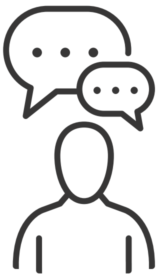
pay for online news last year

(=8th /12)

WEEKLY MULTMEDIA USAGE

News Video	**15%**
News Audio	**10%**

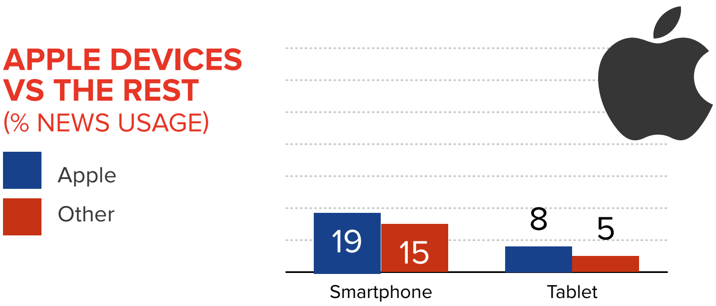


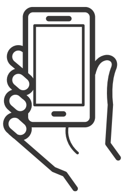


DIGITAL PARTICIPATION

14% share a news story via email or social media. Japan is **12th out of 12** in overall participation index.

APPLE DEVICES VS THE REST
(% NEWS USAGE)





19% say the smartphone is the main way of accessing online news

5% say the tablet is the main way of accessing online news

[17] Japanese government: *Research and Study into the Impact on the Society Made by the Progress of the ICT*, Mar. 2014. www.soumu.go.jp/johotsusintokei/whitepaper/ja/h26/html/nc143120.html (Japanese language).

AUSTRALIA

STATISTICS

Pop	**22.5m**
Internet	**94%**
Trust in the news	**39%** (8th/12)
Interest in news	**65%** (9th/12)

With near-universal internet access and high smartphone penetration, Australians are early adopters of new technology and avid digital news consumers. Australia's broadcast environment includes two public broadcasters, three commercial terrestrial TV networks, the Foxtel cable/satellite/IPTV network, and multiple commercial radio networks.

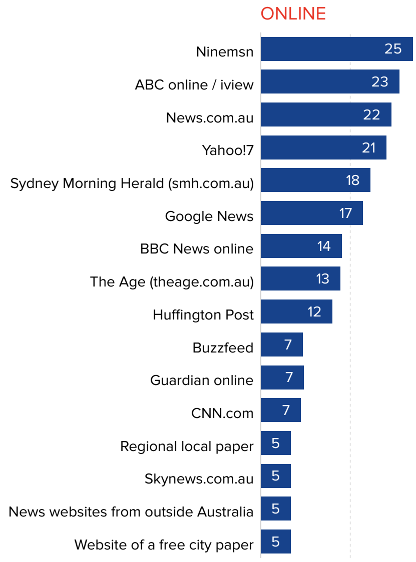
Despite the most concentrated print ownership of any Western democracy – coupled with a contracting traditional media industry – there is still excitement and potential in the sector: for example, the independently published weekly *The Saturday Paper*, launched in 2014, was accessed by 9% of survey respondents in the past week. Digital-only launches include free-access local versions of UK mastheads the *Guardian* (2013) and the Mail Online (2014) and of American sites Buzzfeed (2014) and the Huffington Post (2015).

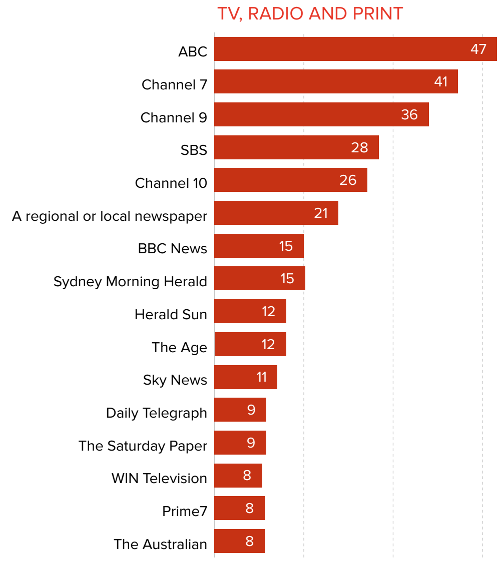
The easing in 2006 of cross-media ownership restrictions allowed for asset acquisition in two out of three of the television, newspaper, and radio sectors in a geographical area. Media ownership remains an ongoing issue, with the Communications Minister again raising the prospect of limited deregulation as recently as March 2015.

National broadcaster ABC achieves high penetration in urban, regional, and rural regions via multiple traditional and online platforms. Whilst the ABC continues to move into the digital space with some confidence, the organisation has been subject to recent editorial and financial pressure from Australia's right-wing Federal Government.

MDB

TOP BRANDS
% WEEKLY USAGE





DIGITAL PARTICIPATION

32% share a news story via email or social media. Australia is = **4th out of 12** in overall participation index.

DIGITAL REACH

Newspapers	**39%**
Broadcasters	**35%**
Pure players	**67%**

CROSS PLATFORM REACH

Newspapers	**68%**
Broadcasters	**89%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**58%**
Broadcasters	**87%**

The number paying – or willing to pay – for news remains low, which may affect the two major publishers in Australia's largely duopolistic newspaper market.[18]

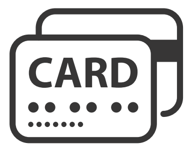
Fairfax Media operates a hard paywall for national business daily the *Australian Financial Review* and soft paywalls for metropolitan dailies the *Sydney Morning Herald* and Melbourne's *The Age*. Newsroom and back-office reductions may have reduced product quality and – as a result – sales. Fairfax reported 69% share of all metropolitan mastheads' digital-only subscriptions and 19.5% share of print sales, amounting to 26.2% of the total metropolitan newspapers share.

News Corp Australia operates a hard paywall for national daily *The Australian*, whose circulation drop is offset to some extent by a rise in print+digital subscriptions and digital-only sales. News Corp reported 31% share of all metropolitan mastheads' digital-only subscriptions and 71.3% share of print sales, amounting to 65.8% of the total metropolitan newspapers share. News's other mastheads – including the web-only *News.com.au* – remain free to access.

11%
pay for online news last year
(=5th /12)

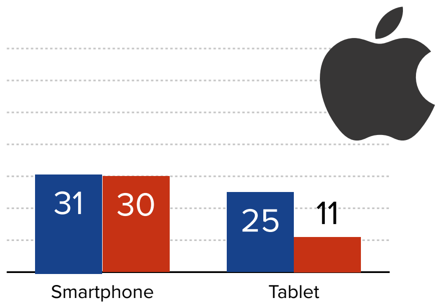
TOP DIGITAL SUBSCRIPTIONS

The Age
The Sydney Morning Herald
The Australian



APPLE DEVICES VS THE REST
(% NEWS USAGE)

Apple
Other



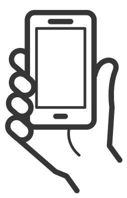
TOP SOCIAL NETWORKS*

Facebook	**48%**
YouTube	**15%**
Google+	**7%**
Twitter	**7%**
LinkedIn	**5%**

*used weekly for news

TOP NEWS APPS (ON SMARTPHONE)

ABC/iview	**16%**
Yahoo!7	**11%**
Ninemsn	**11%**



32% say the smartphone is the main way of accessing online news

15% say the tablet is the main way of accessing online news

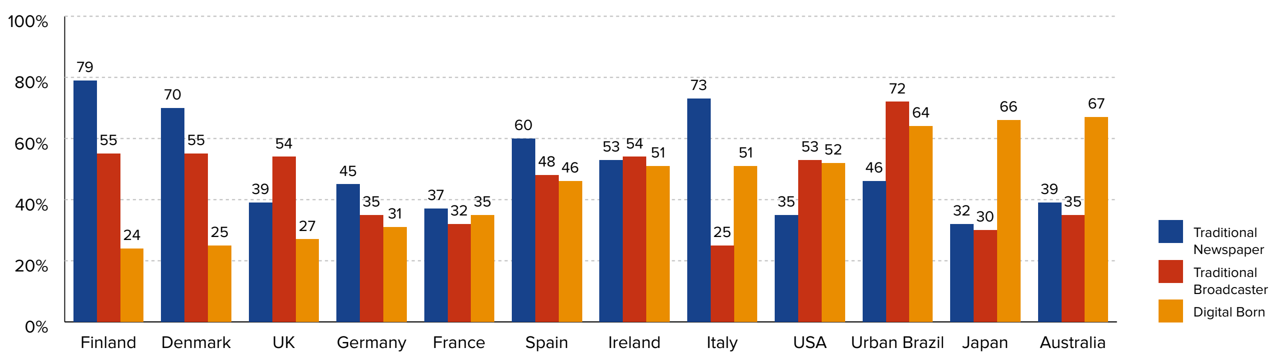
[18] Circulation figures in this section are from Australian Bureau of Circulation audit December quarter 2014. Digital news figures combine digital-only and print+digital subscriptions packages and excludes print-only subscriptions.

/// 1.13 COMPARATIVE BRAND DATA ANALYSIS

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

In the figure below we have used these classifications to show the level of disruption suffered by traditional news organisations from pure players. We can see that in some countries like Finland and Denmark, *traditional newspaper brands* still dominate online news. In the UK and Brazil *broadcast brands* take the largest share, with newspapers playing a lesser role. By contrast, in Japan, Brazil, Australia, and the US there has been far more impact from *digital-born players*.

ONLINE REACH OF NEWSPAPERS, BROADCASTERS, AND DIGITAL BORN PLAYERS
BY COUNTRY



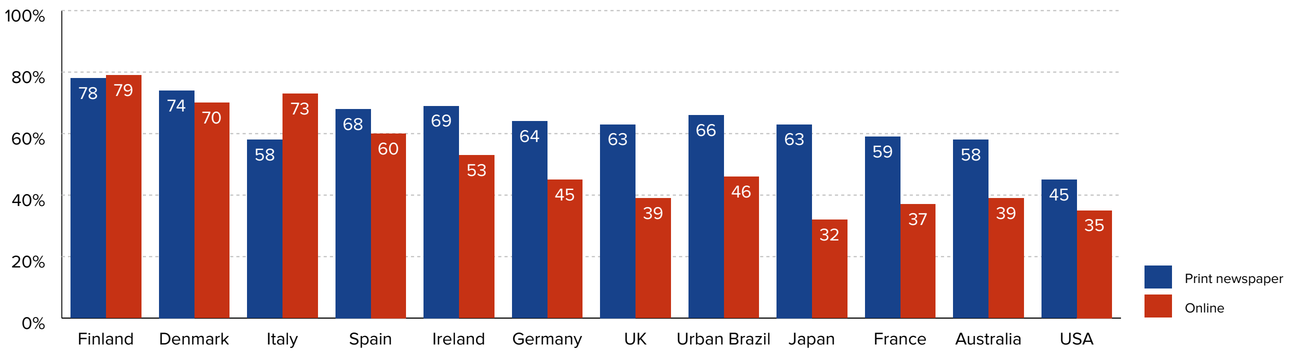
Q5b. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader). *Base: Total sample in each country.*

HOW NEWSPAPER BRANDS ARE MANAGING THE TRANSITION TO DIGITAL

Aggregators and new digital native news companies may be gaining ground but they still produce a very small proportion of original journalism. The majority of journalists are still employed by companies that built their reputation from newspapers, which is why there is so much concern about their long-term sustainability in a digital age.

74%
read newspapers in print or online
12 COUNTRY AVERAGE

NEWSPAPER BRAND REACH BY COUNTRY
PRINT/ONLINE SPLIT



Q5a/b. Which, if any, of the following have you used to access news in the last week? Via traditional platforms/online. *Base: Total sample in each country.*

Overall we find that three-quarters of our sample (74%) across all countries access a newspaper brand each week but in most countries the audience share coming from the online part of the operation grows every year.

Some countries like Finland have seen newspapers transferring a traditional strength in print to online usage. Two-thirds of our sample (64%) use these brands in both print and online, with a total reach of 93%. This is partly because Finland, as a small country, has been less disrupted by outside forces – protected by language and culture. But the position of newspapers in Australia, the United States, and Japan is very different.

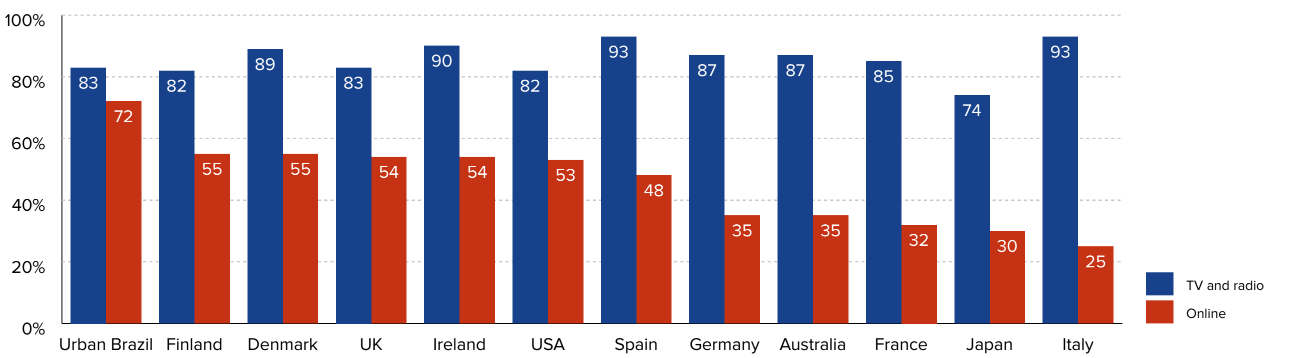
BROADCASTERS ONLINE – A MIXED PICTURE

Across our sample we see that the vast majority (89%) are using a broadcaster brand via TV, radio, website, or app to access the news. But for these public service or commercial channels the main focus – and the main audience – remains with television and radio.

Audience levels and business models around broadcast news have not been disrupted to the same extent as print. Indeed for most, online news has been an opportunity to *extend* services and overall reach by competing head to head with newspapers around text news.

The success of TV brands online has partly depended on the extent to which they have been able to compete directly with newspapers.

BROADCASTER REACH BY COUNTRY
TV AND RADIO VS ONLINE

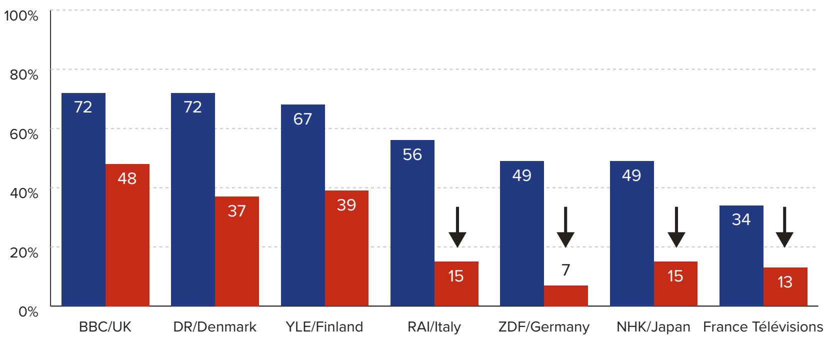


Q5a/b. Which, if any, of the following have you used to access news in the last week? Via traditional platforms/online. *Base: Total sample in each country.*

In Brazil, commercial Globo has invested heavily in its online services and is the largest and most successful brand at 25% share online. Public broadcasters in Finland, Denmark, and the UK have faced little restriction on their ability to leverage their considerable investments in journalism online. By contrast NHK in Japan, RAI in Italy, and public broadcasters in Germany and France have faced financial, political, or organisational constraints.

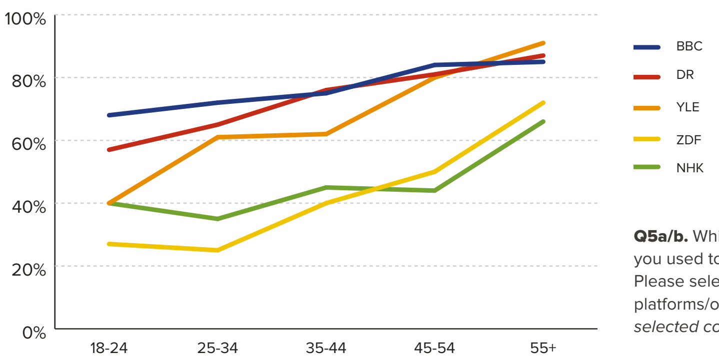
In all cases, the impact of greater competition online means that even the most successful broadcasters end up looking much smaller online. Here are a few examples.

SELECTED PUBLIC SERVICE BROADCASTERS
TV AND RADIO VS ONLINE



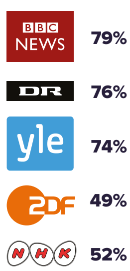
Q5a/b. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via traditional platforms/online. *Base: Total sample in each country. RAI offline estimated as TG1,2,3 combined with RAI News with an assumption of 66% TG1,2,3,4,5 code. France Télévisions is a combination of FTV and FTVinfo. Those who used both within each combination are counted only once.*

PUBLIC SERVICE BROADCASTERS USAGE BY AGE
ACROSS TV, RADIO, AND ONLINE



Q5a/b. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via traditional platforms/online. *Base: Total sample in selected countries.*

COMBINED REACH
(ALL AGES)



Low levels of online usage for public service news are a particular problem because most PSBs have a mandate to provide services for all age groups and demographics.

Of the selected broadcasters, the BBC has the highest overall reach, with almost 80% accessing a news broadcast, news website, or app in the last week. It also has the flattest age profile; its strong online presence means that over two-thirds (68%) of 18–24s also use its services. By contrast YLE, the Finnish broadcaster, reaches only four in ten young people (40%) but nine in ten (91%) of over 55s. ZDF and NHK have a healthy overall weekly reach but mainly because of high usage amongst the over 55s. As young people watch less television the low levels of online reach will increasingly affect the legitimacy of public broadcasters and the way they are funded.

DIGITAL-BORN NEWS SECTOR

Digital-born is a wide category that includes (a) portals like MSN and Google News that aggregate news from other sources and (b) second-wave start-ups like the Huffington Post, Buzzfeed, and Vice News that create original content as well as repackaging news from elsewhere.

In general the old-style portals like Yahoo and MSN have been declining in popularity along with the move to mobile. Much of their success came from the tie-in with email services and default search engines on computers. By contrast the Huffington Post has significantly increased its audience in the last year in many of the countries we survey. In the United States it has increased online reach by 5 percentage points while Buzzfeed has doubled in popularity. We see similar trends towards socially driven news companies in other markets such as Italy.

GROWTH OF BUZZFEED AND HUFFINGTON POST FOR NEWS
US AND ITALY

	All	Change	18–24s
Huffington Post	22%	+5	27%
Buzzfeed	10%	+5	20%
Yahoo	23%	-5	19%
MSN	11%	-3	8%

	All	Change	18–24s
Huffington Post	7%	+2	9%
Buzzfeed	1%	-	6%
Yahoo	11%	-4	10%
MSN	8%	-3	11%

Q5b. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader) *Base: Total sample/18-24s US=2295/155, Italy=2006/174. Note: We did not survey Buzzfeed consumption in Italy in 2014.*

Both the Huffington Post and Buzzfeed are looking to develop a stronger news focus as they grow. This has involved hiring high-profile journalists and in most counties HuffPo has partnered with traditional news providers such as *Le Monde* in France, *L'Espresso* group in Italy, and *El País* in Spain. MSN, on the other hand, has been pulling back from original content and from their joint ventures in Australia and Japan to focus more on pure aggregation.

MANY MORE SOURCES OF NEWS BUT CONSUMERS STICK TO A FEW TRUSTED BRANDS

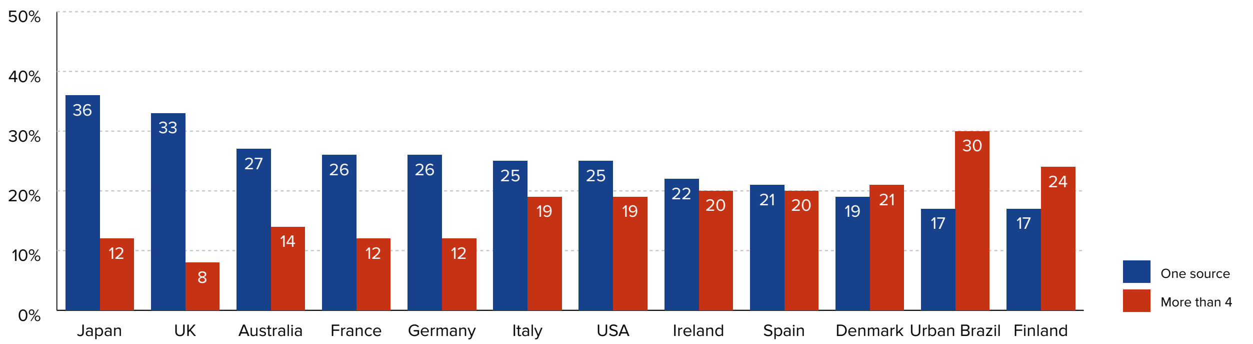
The growth of the internet has provided access to more and more sources of news than ever before – most of them free. These include digital-born brands (above), but also easier access to international brands like the *International New York Times*, *Daily Mail Online*, and the *Financial Times*. And then there is a plethora of specialist blogs and websites that provide information related to business, technology, and entertainment.

Against this background, it is perhaps surprising that our data suggest most people continue to access a relatively small number of trusted sources. Looking at online news in particular, a quarter of our total sample (25%) only consume one source of news in a given week. That figure rises to a third in Japan (36%) and the UK (33%).

The low number of sources used is perhaps a reaction to the bewildering amount of choice but also testament to the enduring power of strong brands. In Japan more than half (62%) of those who only use one online source access Yahoo and in the UK 46% use the BBC.

Those groups who express a stronger interest in news, however, are far more likely to access multiple sources online. We see the same effect by country; in urban Brazil – where there is a strong self-declared interest in news – almost a third (30%) access more than four sources online each week, with a fifth or more doing the same in Ireland (20%), Spain (20%), Denmark (21%), and Finland (24%).

NUMBER OF ONLINE SOURCES BY COUNTRY
SINGLE SOURCE VS MORE THAN FOUR



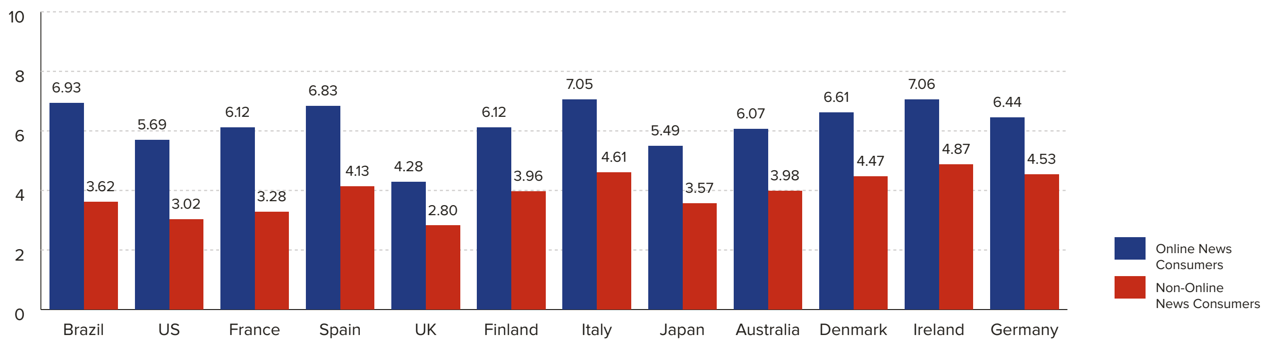
Q5b. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader). *Base: Total sample in each country.*

ONLINE INCREASES THE NUMBER OF NEWS BRANDS ACCESSED OVERALL

Taking an aggregate view of all our countries we find that in combination with traditional platforms, the impact of online is to significantly increase the number of brands used for news each week. In all countries, those who consumed news online used between 1.4 and 2 times more news brands on average than those who did not. This pattern was most evident in Brazil (1.9x), and least evident in Germany (1.4x).

Combined with data showing that online users continue to regularly access TV news (75%), radio news (37%), and print (41%), this shows that online is not replacing traditional media but is mainly being used as an additional layer extending choice and convenience.

EFFECT OF ONLINE USE ON THE NUMBER OF BRANDS ACCESSED
BY COUNTRY



Results achieved by deduplicating brands from the list of traditional and online sources at **Q5a/b** and comparing with segments of online and non-online users derived from **Q3** which asks about the broad sources of news accessed in the past week. *Base: Total sample in each country.*

2 NEWS ACCESS AND CONSUMPTION

In this section we lay out the overall shape of news consumption across TV, radio and online. We look at different segmentations to help us understand the varying patterns of news use. We look at when and where people access the news, comparing data across seven countries. We also explore motivations for news and trust in different types of media. Finally, we focus on interest in different types of news, including political news, and look at the impact of political viewpoints on consumption and social sharing.

/// 2.1 SOURCES OF NEWS

TELEVISION REMAINS THE NUMBER ONE SOURCE OF NEWS IN MOST MARKETS

Television and online remain the most popular ways of accessing news on a weekly basis. Amongst our sample, television is ahead in Germany and France, with online winning in many other countries. Given that this is an online survey and thus will underrepresent traditional users who are not online, it is probably the case that TV news is still ahead everywhere except for the United States and possibly Denmark, Finland, and Australia.

The strength of traditional platforms across many countries is also well illustrated by these data and reflects both investment in programming and some deep cultural habits that are proving hard to shift.

SOURCES OF NEWS BY COUNTRY

	UK	GER	SPA	ITA	FRA	IRE	DEN	FIN	US	BRA	JPN	AUS
TV	75%	82%	82%	78%	80%	76%	75%	75%	64%	81%	73%	72%
Radio	37%	50%	40%	23%	28%	50%	50%	45%	26%	39%	17%	41%
Printed Newspapers	38%	38%	47%	38%	19%	49%	33%	49%	23%	33%	44%	39%
Online (inc. social media)	73%	60%	86%	81%	71%	83%	85%	90%	74%	91%	70%	85%

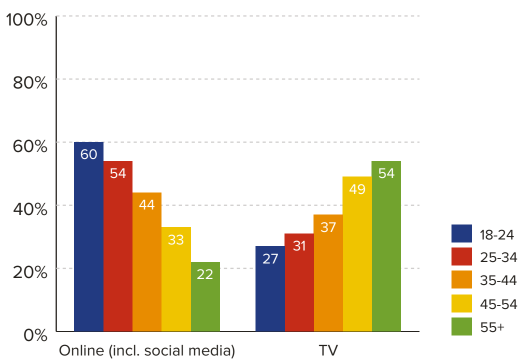
Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply. *Base: Total sample in each country.*

GENERATIONAL SPLITS

Though television remains the most regularly accessed type of news, this is not the case for all. Indeed every year in our data we see a significant generational split, with young people expressing an overwhelming preference for online news.

Not only do young people prefer online, our data show that a significant proportion are abandoning television news completely. Some of the biggest falls have been in the United States, France, and Denmark – particularly with under 35s. Only a quarter (24%) watch TV news bulletins or programmes in the US compared with 37% two years ago. This is in sharp contrast to Germany where 58% of under 35s still watch bulletins or programmes weekly.

MAIN SOURCE OF NEWS BY AGE – YOUNG PREFER ONLINE
ALL COUNTRIES



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news? *Base: All who used a news source in the last week All = 23155.*

TELEVISION NEWS BULLETIN USE
UNDER 35s

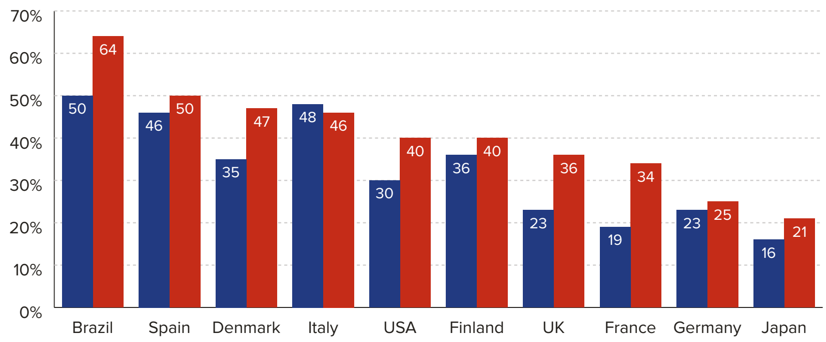
	UK	GER	FRA	DEN	USA
2013	51%	63%	67%	65%	37%
2015	42%	58%	53%	52%	24%
Change	-9	-5	-14	-13	-13

Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply. *Base: Under 35s UK=486, US=538, France=353, Germany=452, Denmark=568.*

THE RISE OF SOCIAL MEDIA AS A SOURCE OF NEWS

Within online, we have also seen a sharp rise in the growth of social media in the past year as a source of news. Some of the biggest increases have come in the US, UK, Brazil, and Denmark (see next chart).

SOCIAL MEDIA AS A SOURCE OF NEWS
ALL COUNTRIES



SEE ALSO

Australia	**51%**
Ireland	**49%**

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

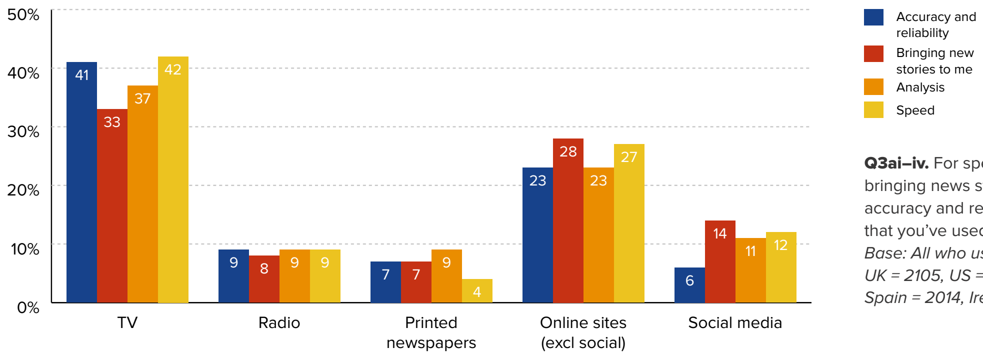
THE VALUE OF DIFFERENT NEWS SOURCES

To understand better the value created by these different sources of news, we asked in more detail about a number of dimensions – including speed, serendipity, and accuracy – for each platform in the UK, US, France, Germany, Spain, and Ireland.

In terms of the averages, we find that television news is most valued across the board (see chart below). Online news websites and social media are valued more for serendipity (alerting audience to stories they didn't know about). Social media are considered least reliable.

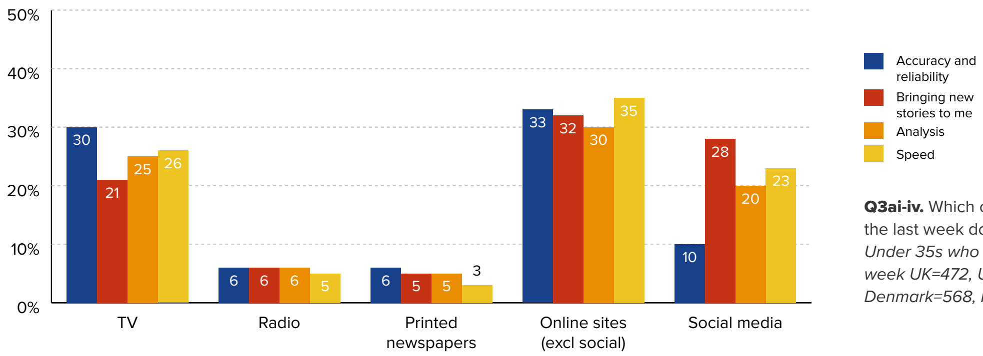
We see a very different story, however, if we look at the under 35s. Here online is considered best on all dimensions, while social media is considered particularly valuable for alerting people to stories they didn't know about. Interestingly, though, even this group of young people is highly distrustful of the accuracy of information in social media when compared with reputable brands online or on TV.

THE VALUE OF DIFFERENT PLATFORMS FOR NEWS
SIX COUNTRIES



Q3ai–iv. For speed of coverage (breaking news)/ bringing news stories to me/analysis and comment/ accuracy and reliability, which one of the sources that you've used in the last week do you find best? *Base: All who used a news source in the last week UK = 2105, US = 2198, France = 1947, Germany = 1943, Spain = 2014, Ireland = 1486.*

THE VALUE OF DIFFERENT PLATFORMS FOR NEWS
UNDER 35s



Q3ai-iv. Which one of the sources that you've used in the last week do you find best for the following? *Base: Under 35s who used a source of news in the last week UK=472, US=492, France=339, Germany=442, Denmark=568, Ireland=485.*

/// 2.2 SEGMENTATION ACROSS AND WITHIN COUNTRIES

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

TRADITIONALISTS VS MAINLY DIGITAL

Our first segmentation categorises respondents into those who exhibit *traditional* approaches (mainly TV, radio, and print) and those who are *mainly digital* in the way they consume the news. We also identify a sizeable group who are platform agnostic. They actively consume news across traditional and online platforms (see the table below).

We classify Traditional users as those who consume more offline sources than online when we ask about specific newspaper, TV, radio, and online brands. (Q5a/b. Which, if any, of the following have you used to access news in the last week? Via TV, radio, or print/via online platforms?) Mainly Digital users are those who consume more online sources than offline. To pick up anomalies we then further adjust these segments based on the number of digital devices used for news each week. Half & Half users who use more than two digital devices per week for news go into mainly digital segment and any traditionalists who use more than two devices for digital news go into the Half & Half category.

SEGMENTATION BY SOURCES AND DEVICES

		Online sources					
		0	1	2	3	4	5+
Offline sources	4	TR	TR	TR	HH	HH	HH
	3	TR	TR	HH	HH	MD	MD
	2	TR	HH	HH	MD	MD	MD
	1	TR	HH	MD	MD	MD	MD
	0	TR	MD	MD	MD	MD	MD

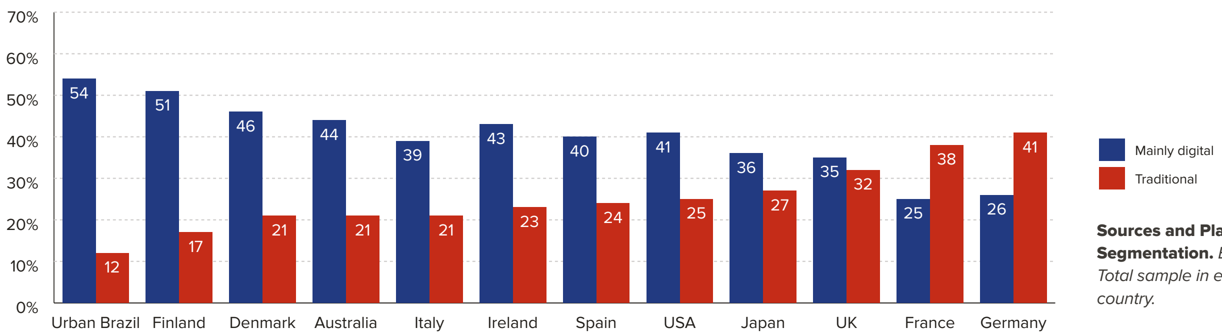
Traditional
Half & Half
Mainly Digital

Looking at the results of these segmentations by country we find that France and Germany still have the largest percentage of our online sample accessing news in mainly traditional ways.

A large percentage of these (around three in ten) ONLY access news via TV, radio, or print – even though they are active online in other ways.

All other countries in our survey have a majority of mainly digital (online) news usage, though the UK also has a large traditional segment (32%).

TRADITIONAL USERS VS MAINLY DIGITAL USERS
ALL COUNTRIES



Sources and Platforms Segmentation. *Base: Total sample in each country.*

We need to be careful in interpreting these results. The Urban Brazil sample is a much younger group and will not be representative of the national picture. Italy and Spain also have lower internet penetration so these data will significantly underrepresent traditional media use.

But it is striking how different the patterns are – even in countries with very similar levels of internet penetration such as Finland and Japan. A number of large countries are taking longer to adopt digital news use and we also find that within those countries there are particular groups that prefer traditional platforms.

WHO ARE THE TRADITIONALISTS
TEND TO BE FEMALE, OLDER, POORER AND LESS WELL EDUCATED

58% are female

45% are aged 55+

72% do not go to university/ have a degree

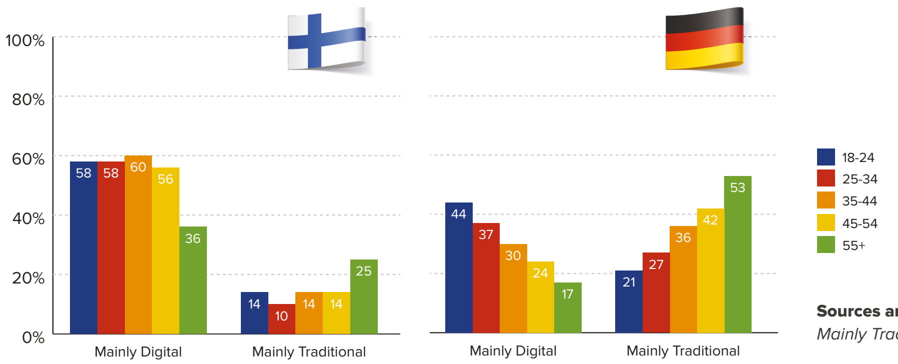
81% Low or medium income

Comparing Finland and Germany we see very different patterns based on age. In Finland online news or multiplatform news sweep through *all* age groups. Only a proportion of over 55s are holding out – but the majority of them use a range of platforms.

By contrast, in Germany a significant proportion of all groups over 25 are sticking to traditional patterns. The overall appeal of online news is much lower – despite high internet use in general.

These differences could be to do with a number of factors including digital literacy and the willingness (or not) of big media companies to embrace and promote online at the expense of their traditional businesses.

TRADITIONAL/ONLINE SPLIT BY AGE
FINLAND AND GERMANY



Sources and Platforms Segmentation. *Base: Mainly Digital/ Mainly Traditional Germany = 523/809, Finland = 762/258.*

NEWS LOVERS, DAILY BRIEFERS AND CASUAL USERS

Our second segment is based on a mix of frequency and interest in the news. The conceptual framework for our segmentation is set out in the next chart.

We will refer back to these groupings throughout this study, but as we shall see, some of these groups play more important roles than others in driving the new interactive news ecosystem. News Lovers consume more, share more, are better educated, and are twice as likely to pay for online news.

France has the highest proportion of *Casual Users* (44%), which reflects a self-declared low interest in news. Urban Brazil (28%) and Italy (26%) have the highest proportion of *News Lovers*, while Spain and Finland (58%) have the highest proportion of *Daily Briefers*.

MORE ABOUT NEWS LOVERS

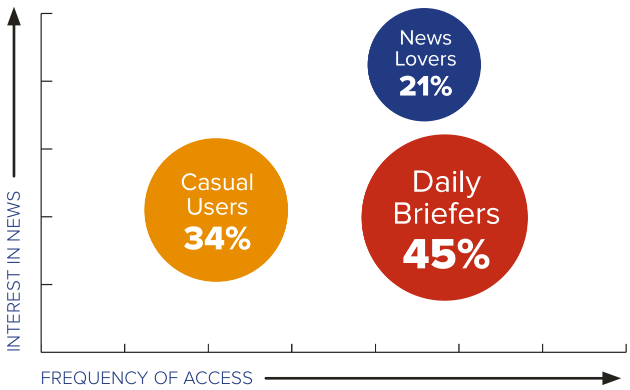
60%
are male

46%
have bachelor or masters degree

2X
more likely to share news than casuals

2X
more likely to pay for news than casuals

SEGMENTATION BY FREQUENCY OF ACCESS AND INTEREST IN NEWS



News Lovers

Extremely interested in news & access > 5 times a day.

Daily Briefers

Very or extremely interested who access 1-5 times a day. Very interested who access more than 5 times a day.

Casual Users

Access < once a day and somewhat or less interested.

Q1b. Typically, how often do you access news? **Q1c.** How interested, if at all, would you say you are in news? *Base: All = 23557.*

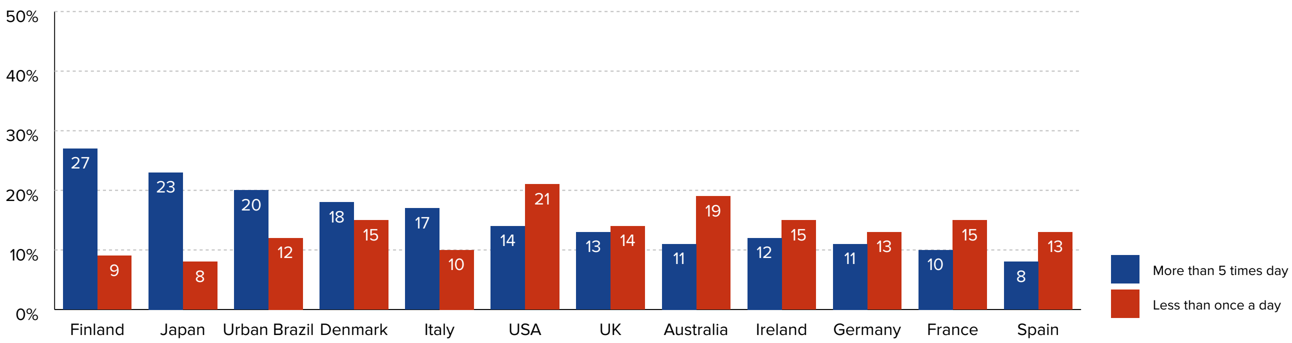
FREQUENCY OF ACCESS

A key component of the *News Lover* category is frequency of access. Here we asked users about how often they accessed news on any platform.

Around a quarter of those in Finland (27%) and Japan (23%) said they accessed the news more than five times a day. That is more than twice as often as users in Spain, France, and Germany who said they were most likely to check on news between one and five times each day. The idea of daily briefing seems more established in these countries where the evening television bulletin remains a key source of news. The US and Australia have the highest proportion checking in less than once a day (several times a week or less).

Across all our countries, 20% of men access more than five times a day, compared with just 10% of women. Increased frequency of access is strongly correlated with the growth of online, with *mainly digital* users almost three times as likely as traditionalists to access the news more than five times a day. Increased frequency also seem to be related to the growth of new devices – such as mobiles and tablets – which are extending the range of access points. The more devices we have, the more frequently we consume (see the next chart).

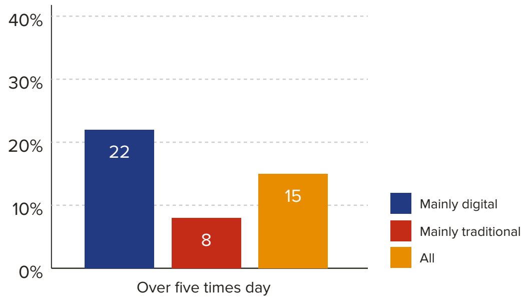
FREQUENCY OF ACCESS BY COUNTRY



Q1b. Typically, how often do you access news? By news we mean national, international, regional/local news, and other topical events accessed via any platform (radio, TV, newspaper, or online). *Base: Total sample in each country.*

ONLINE DRIVES GREATER FREQUENCY OF USE

DIGITAL USERS ACCESS MORE OFTEN



MORE DEVICES YOU USE, THE MORE OFTEN YOU ACCESS NEWS

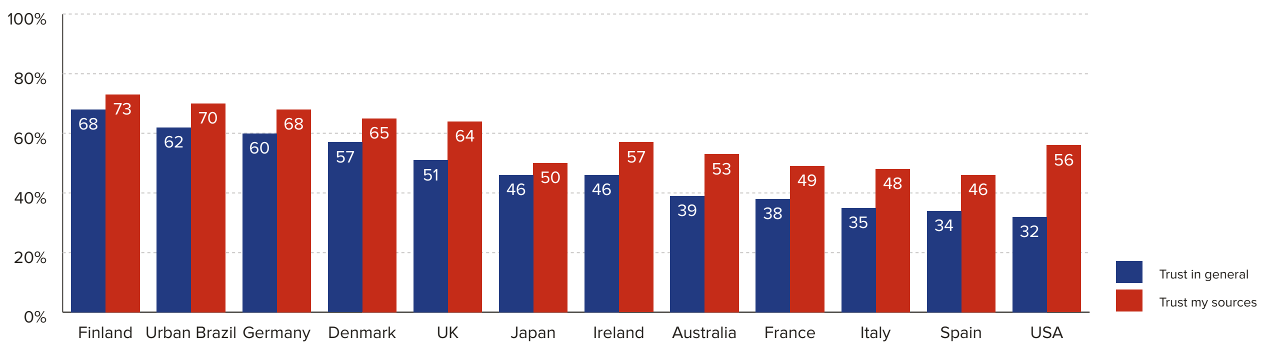
Device	More than five times
ALL News users	15%
Computer	17%
Smartphone	19%
Tablet	21%
Tablet and smartphone	25%
All three	27%

Sources and Platforms Segmentation. *Base: All who accessed news more than 5 times a day. All = 3579.*

/// 2.3 TRUST IN THE NEWS

This year we have also explored the levels of trust in the media generally and compared this with trust in the media that people use. Overall we find significant differences in general trust with over two-thirds (68%) agreeing that they trusted the media in Finland, compared with only one-third in the United States (32%), Spain (34%), and Italy (35%).

LEVELS OF TRUST IN THE NEWS MEDIA
ALL COUNTRIES



Q6a. Thinking about news in general, do you agree or disagree with the following statement? 'I think you can trust most news most of the time'. **Q6b.** 'I think I can trust most of the news that I use most of the time'. Shows those who strongly or tend to agree with the statements. *Base: Total sample in each country.*

TRUST RISES WITH AGE

ALL	18–24	25–34	35–44	45–54	55+
47%	41%	40%	47%	52%	50%

Q6a. Thinking about news in general, do you agree or disagree with the following statement? "I think you can trust most news most of the time". *Base: All=23557.*

Trust in the news media rises with age, education, and income. *Casual Users* are much less likely to trust the news than *News Lovers* or *Daily Briefers*.

In our online focus groups – held in the UK and US – we uncovered some of the reasons for the lack of faith in the news media. Much centred on a perceived loss of accuracy and reliability:

- *My rule is chuck 50% of the news out … at the beginning of January … the ANSA in Rome spread rumours that Fidel Castro had died and I knew it was not true.* (Daniela, US)
- *Half the time the 'news' turns out to be fake.* (Trent, US)
- *I used to read a lot of CNN, particularly for US political news. But recently they have garnered a reputation as 'untrustworthy' and often hasty in their reporting.* (Ben, UK)

Apart from accuracy there were also concerns around agendas and bias – political or commercial.

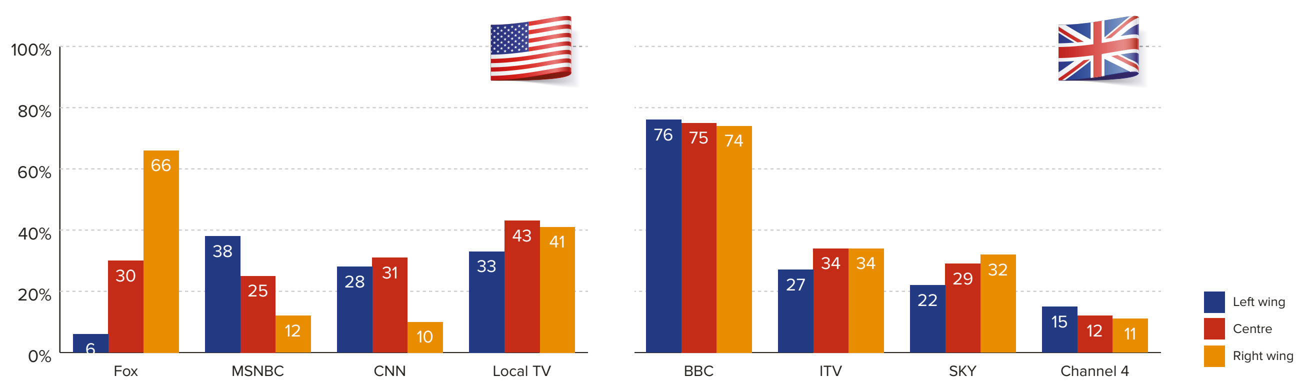
- *There are often times stories that are considered news but turn out to be adverts or come from a source that is obviously trying to sell something other than the news.* (Jenn, US)
- *Some sources have an obvious slant in one direction or the other, but the overall effect is to make me not trust anything they say.* (Helena, UK)

The greater trust in news you use in the United States may be explained by the highly partisan nature of TV channels like Fox News and MSNBC (see comparison with UK below). Those who watch these US channels may feel more positively about sources that express their own political viewpoint while disapproving of other channels that take an alternative position.

In the United Kingdom focus group the impartiality and fairness both of broadcasters and reputable online newspaper sites came through strongly as a major driver of trust.

- *[I trust] names [brands] in news that are respected, I guess, and have a reputation for objectivity.* (Helena, UK)
- *[Reputation comes from] track record, both professional and those I've read in the past and deemed reputable.* (Ben, UK)

PARTISAN VIEWING OF TV NEWS CHANNELS
US AND UK COMPARED



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.** Which, if any, of the following have you used to access news in the last week? (Traditional platforms) *Base: Left wing/Centre/Right wing, UK = 521/1029/235, US = 461/974/536.*

/// 2.4 MOTIVATIONS FOR WATCHING OR READING THE NEWS

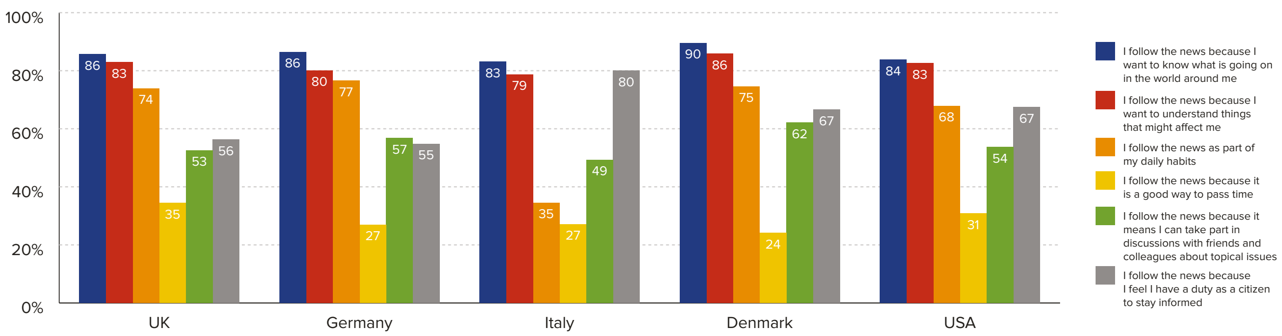
For the first time this year, we have asked about why people access the news. Across all markets the most important reasons were to 'know what's going on in the world' and also 'to understand how news may affect me'.

In Germany, the UK, and Denmark habit is a key driver of usage, while in Italy and the United States there is a strong motivation around the duty of the citizen to stay informed.

Only a quarter of our Danish sample (24%) agrees that passing the time is a key motivation – compared with a third in the UK (35%) and the United States (31%).

News Lovers, as one might expect, have much stronger motivations to access news in general and are far more driven by habit (80%) than *Casual Users* (50%).

MOTIVATIONS FOR FOLLOWING THE NEWS
SELECTED COUNTRIES

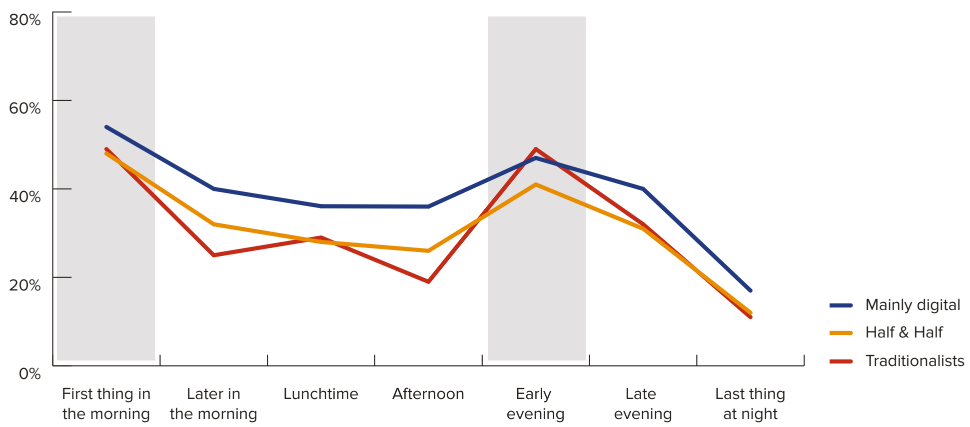


Q2aNEW1/2/3/4/5/6. People have different reasons for following the news. To what extent do you agree or disagree with each of the statements below? *Base: Total sample in UK = 2149, US = 2295, Germany = 1969, Denmark = 2019, Italy = 2006.*

/// 2.5 WHEN AND WHERE WE ACCESS THE NEWS

The classic news consumption curve is being transformed by the growth in new mobile devices, which are extending the access points through the day. Aggregating data from all our 12 counties, we see that mainly digital users have a much flatter consumption curve than those who still consume news via mainly traditional means. With the latter group, we see more distinct peaks around early morning, lunchtime, and early evening, coinciding with the key TV and radio broadcasts.

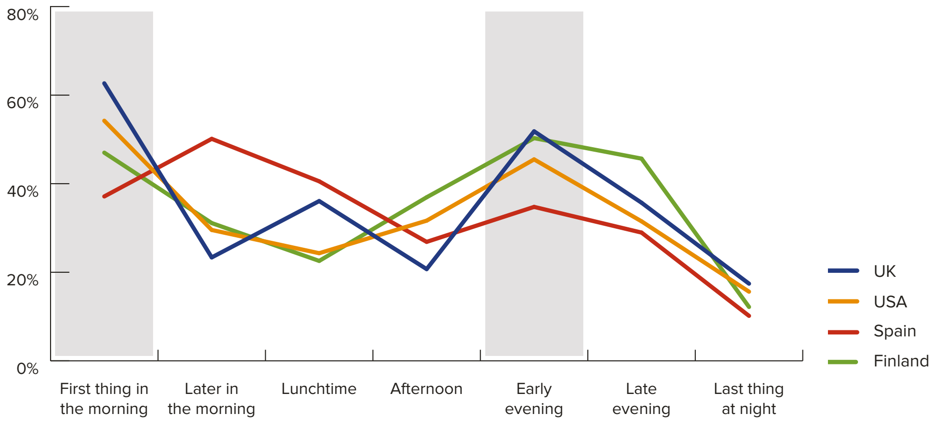
NEWS ACCESS BY TIME OF DAY
DIGITAL VS TRADITIONAL



Q4b. When do you typically access the news? Please select all that apply to you. *Base: Total sample in selected countries. Mainly Digital = 3328, Platform Agnostics = 2669, Traditionalists = 1982.*

Interestingly, we see different patterns across countries. The UK curve broadly mirrors the times of the core radio and TV news shows – reflecting the high proportion of traditional users. The Spanish tend to start and finish later, with a major dip in usage during the afternoon – showing that there is some underlying truth in national stereotypes. In Finland, the main TV news shows are spread throughout the evening, leading to their slightly later consumption curve.

NEWS ACCESS BY TIME OF DAY
SELECTED COUNTRIES



Q4b. When do you typically access the news? Please select all that apply to you. *Base: Total sample UK = 2149, US = 2295, Spain = 2026, Finland = 1509.*

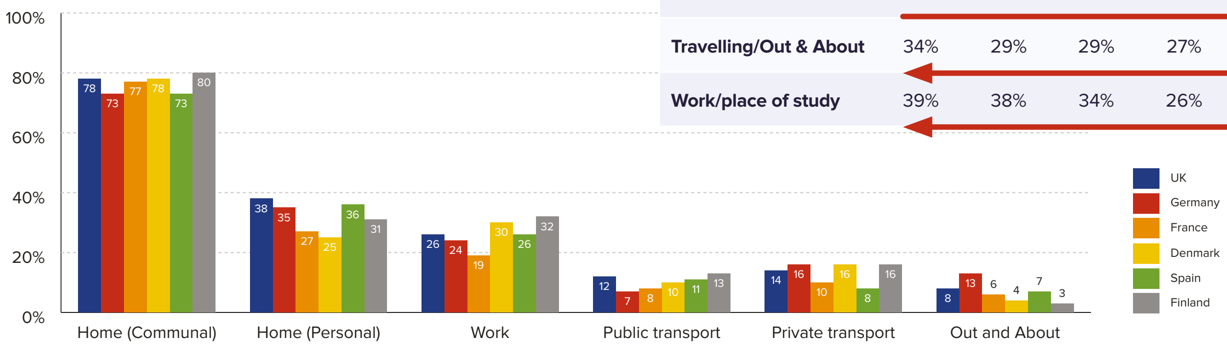
WHERE PEOPLE ACCESS THE NEWS – SIX-COUNTRY STUDY

This year we looked in detail at where people access the news in the UK, France, Germany, Spain, Denmark, and Finland. Across all our countries we see that the majority of news access remains in the home – most of it in communal spaces like the living room and kitchen. Much of this is driven by older people who tend to spend more time at home, while the young are on the move more using public and private transport and spending time in other people's homes.

The patterns are remarkably similar across counties, although work usage is almost twice as low in France as in Finland. The Germans, Danes, and Finns access news more in private transport, which reflects different patterns of commuting (more driving, etc.) when compared with Spain.

WHERE PEOPLE ACCESS THE NEWS
SELECTED COUNTRIES

	18–24	25–34	35–44	45–54	55+
Home	84%	84%	88%	92%	96%
Travelling/Out & About	34%	29%	29%	27%	19%
Work/place of study	39%	38%	34%	26%	11%

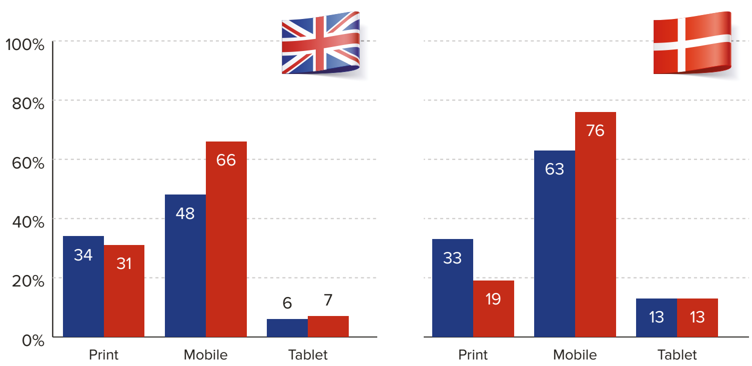


OPT4c. Where were you when you looked at/listened to the news over the last few days? Please select all that apply. *Base: Total sample UK = 2149, France = 1991, Germany = 1969, Denmark = 2019, Finland = 1509, Spain = 2026.*

THE IMPACT OF MOBILE PHONES AND TABLETS ON THE DAILY COMMUTE

On public transport the mobile phone has extended its lead over printed newspapers and over the tablet in Denmark and the UK, where we have been collecting data since 2013. In the UK, smartphone use has jumped 18 percentage points to 66%. Print in the UK has only shown a marginal decline, partly because of the availability and convenience of free commuter newspapers like the *Evening Standard* and *Metro*.

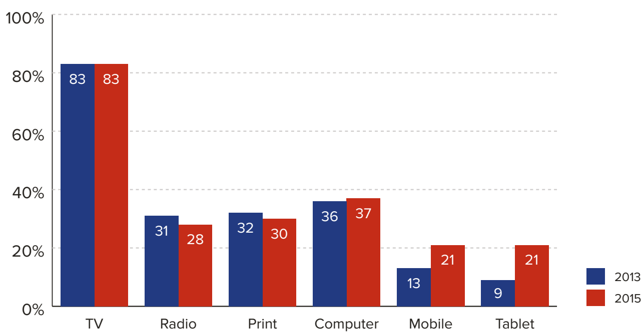
MOBILE PHONE IS MAIN DEVICE FOR ACCESSING NEWS ON PUBLIC TRANSPORT
UK AND DENMARK



OPT4E_5. Please mention the key news media you used in these locations. Please select all that apply to you. Whilst travelling, commuting on public transport *Base: All who consumed news whilst travelling on public transport 2013/2015 UK = 274/249, Denmark = 92/189.*

When we look at the specific platforms used in the home to access news, we can see the wide range of choices in play every day. In communal spaces such as the living room and kitchen, the TV remains by far the most regularly accessed but, over the last two years, we see a significant increase in the use of mobiles and tablets in both the UK and Denmark.

MOBILES AND TABLETS ARE INVADING COMMUNAL SPACES IN THE HOME
UK



OPT4e_6. Please mention the key news media you used in these locations. Please select all that apply to you. At home: communal space (living room, kitchen, etc.). *Base: All who consumed news whilst in a communal space at home, 2013/2015 UK = 1421/1719.*

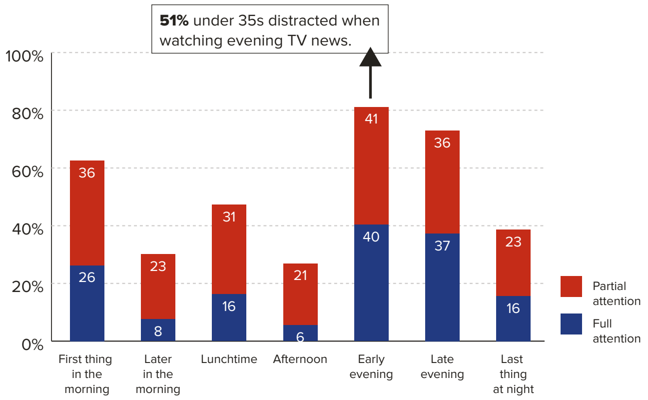
THE ATTENTION CHALLENGE FOR TV NEWS

As people spend more time with digital devices in the living room, we wanted to explore levels of distraction around traditional TV news bulletins and programmes. Are people paying less attention – and thus less well informed – because they are regularly multitasking?

In the UK we found that on average more than half of those who watched TV news said they were not paying full attention. Most attention was paid in the evenings, the most popular time for television news. For those who admitted to being distracted, getting on for half were checking their emails (43%) or browsing the web generally (42%) during the television news. A quarter (27%) said they regularly checked social networks like Facebook and Twitter. Under 35s were 50% more likely to be doing something else than over 35s. They were also much more likely to be checking social media feeds (see charts overleaf).

In personal spaces, the internet has now overtaken the TV as the main way of getting news. There are fewer TVs being used for news in these parts of the home than there were two years ago.

DISTRACTION AROUND TV NEWS BY TIME OF DAY AND TYPE
UK



THOSE WHO PAY PARTIAL ATTENTION SAY THEY TEND TO DO THESE TASKS WHEN WATCHING TV...

Domestic tasks (cooking, ironing, cleaning)	55%
Talk to friends and/or family	41%
Check social media feeds	27%
Check email computer	43%
Browse web generally	42%
Play online games	18%
Read newspapers, magazines etc.	22%

Q4a1/2/3/4/5/6/7. Thinking about the way you watch TV news during which of these times do you give it your full attention/do something else at the same time? *Base: All who watched TV news in the last week UK = 1656.* **Q4ai.** On those occasions when you give TV news only part of your attention, what are the other things you tend to do? *Base: All who watched TV news in the last week but only gave it part of their attention UK = 1402.*

/// 2.6 INTEREST IN DIFFERENT TYPES OF NEWS

Our survey asks respondents to select their five most important types of news. Once again this produces some interesting country-based variations. International news is considered most important in Germany, and also in one of our new countries, Australia, where so many inhabitants have roots in Europe or Asia. Respondents in the United States and urban Brazil are least interested in this type of news.

Regional news is most important in Germany, Finland, and Spain reflecting the relative importance of devolved political power in those countries – and the media systems that have grown up around this. Local news matters more in a vast country like the United States where city newspapers and local TV stations remain a core part of the media diet.

Elsewhere, the Japanese are most interested in entertainment and celebrity news, with the Spanish, Danes, French, and Germans showing the least interest.

The Irish take a particular interest in the business news and the economy – as do the Japanese and Australians. Italians and Spanish are interested in arts and culture news while our sample from urban Brazil is far more interested in health and education than are the rest of our countries.

INTEREST IN DIFFERENT TYPES OF NEWS
ALL COUNTRIES

	UK	GER	SPA	ITA	FRA	DEN	FIN	IRE	USA	BRA	AUS	JPN
News about the country	72%	67%	63%	56%	65%	64%	74%	59%	57%	61%	62%	55%
International news	51%	70%	53%	49%	59%	66%	62%	64%	46%	43%	75%	46%
Local news about my town or city	44%	41%	34%	44%	33%	38%	44%	42%	52%	40%	41%	22%
News about my region	37%	54%	41%	35%	40%	25%	49%	29%	28%	32%	29%	26%
Business and financial news	20%	12%	15%	15%	14%	26%	11%	27%	19%	25%	28%	25%
News about the economy	37%	29%	40%	30%	32%	34%	35%	42%	41%	31%	35%	45%
Entertainment and celebrity news	16%	13%	7%	16%	9%	9%	17%	21%	13%	15%	20%	29%
Fun/weird news	14%	12%	16%	19%	12%	18%	13%	18%	17%	18%	15%	18%
Health news	27%	22%	32%	33%	27%	25%	28%	30%	28%	43%	26%	31%
Education news	12%	12%	25%	14%	14%	12%	7%	13%	15%	32%	11%	11%
Arts and culture news	11%	8%	21%	26%	15%	15%	12%	13%	10%	19%	11%	18%
Sports news	30%	28%	30%	30%	21%	28%	26%	33%	21%	30%	29%	32%
News about the country's politics	41%	50%	46%	46%	46%	46%	32%	32%	47%	36%	29%	47%
Science and technology news	24%	25%	31%	35%	23%	33%	28%	27%	28%	34%	28%	26%

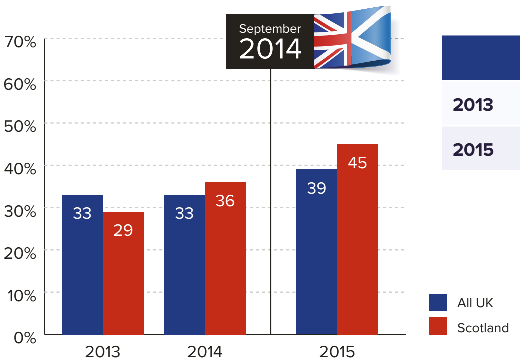
Q2. Which of the following types of news is most important to you? Please choose up to five. *Base: Total sample in each country.*

ELECTION STIMULATES INTEREST IN UK POLITICS

Our survey took place in the run-up to the UK election and in our data this year we can detect greater interest in politics – as well as the continuing fall-out from the Scottish referendum in September 2014. Across the board the biggest rise in interest levels in the UK has been amongst the young and older groups (see table).

In Scotland, the stimulation of interest in politics has been remarkable. In 2013 people in Scotland showed similar interest to the UK average but the passions raised by the independence campaign and the closeness of the result have left Scots ahead on pretty much every indicator.

LEVEL OF INTEREST IN POLITICS
UK



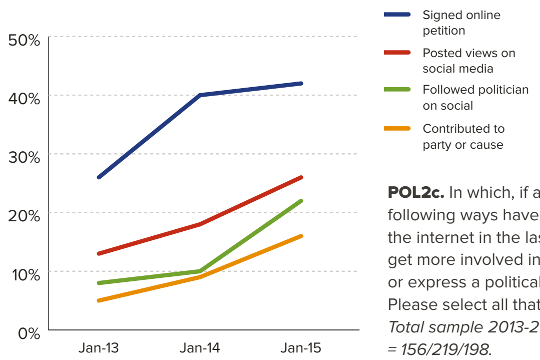
	18–24	25–34	35–44	45–54	55+
2013	33%	28%	29%	32%	37%
2015	48%	30%	31%	36%	46%

POL2a. How interested would you say you are in politics? *Total sample 2013-2015 UK = 2078/2082/2149, Scotland = 156/219/198. Note: Interested refers to those who indicated that they were either 'extremely' or 'very' interested.*

A quarter (26%) regularly post political comments via social networks. More than a fifth (20%) follow a politician on social media, while the percentage of people contributing money to a political party has tripled in two years.

Social media played a significant role in the referendum campaign and even today we find that supporters of the Scottish National Party (SNP) are more likely to use social media for commenting on politics (34%) when compared with Tories (16%) and Lib Dems (11%).

IMPACT OF SCOTTISH REFERENDUM ON POLITICAL PARTICIPATION



POL2c. In which, if any, of the following ways have you used the internet in the last year to get more involved in politics or express a political opinion? Please select all that apply. *Base: Total sample 2013-2015 Scotland = 156/219/198.*

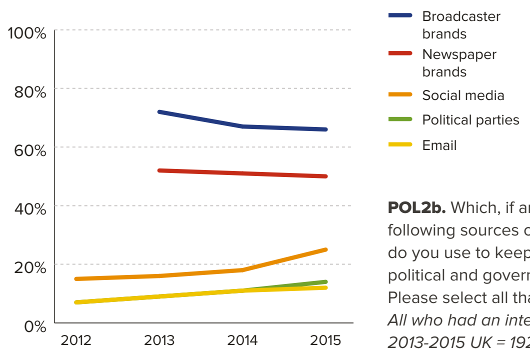
CHANGING SOURCES OF POLITICAL NEWS

Across the UK, our data also show the rise in importance of information that is pushed to individuals through new one-to-one digital channels such as social media and email.

Broadcaster brands like the BBC, ITV, and Sky and newspaper brands (in print and online) remain the most important sources of news but their overall reach is on a downward curve. By contrast, those who say they get political news from social networks like Facebook and Twitter has risen from 15% to 25% in four years. More people are also getting information directly from political parties (7% to 14%).

See section 4.5 for more on Participation and Engagement Online, p. 83.

MAIN SOURCES OF POLITICAL NEWS
UK



POL2b. Which, if any, of the following sources of information do you use to keep up with political and government issues? Please select all that apply. *Base: All who had an interest in politics 2013-2015 UK = 1924/1934/2057.*

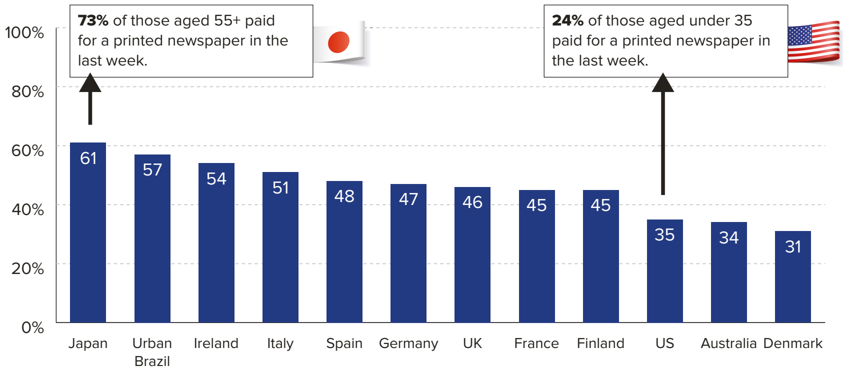
3
PAYING FOR NEWS

/// 3.1 NEWSPAPER PURCHASE ACROSS COUNTRIES

In addition to tracking newspaper consumption by brand and country our survey also benchmarks those who say they have bought a newspaper in a given week. Newspaper purchase does not equate to readership, particularly with the popularity of free papers and the increased bundling of online and print. In addition it should be noted that the figures in our online survey will not match the accuracy of face-to-face surveys or audited circulation figures in this regard. This question may also under-represent newspaper purchase in high-subscription countries like Denmark and Finland, as many of those who pay quarterly/annually may have answered no. Brazil is also an urban sample.

A number of countries have shown a significant decline in newspaper purchase over the last two years including Germany (-9), Japan (-7), US (-7), and the UK (-8). In Japan much of that loss has come from under 35s who are embracing digital ways of accessing news but purchase by over 55s remains strong (73%). In the United States, by contrast, print has lost readers across all age groups, with less than half of over 55s (48%) purchasing and less than a quarter (24%) of under 35s.

NEWSPAPER PURCHASE IN THE PAST WEEK
BY COUNTRY



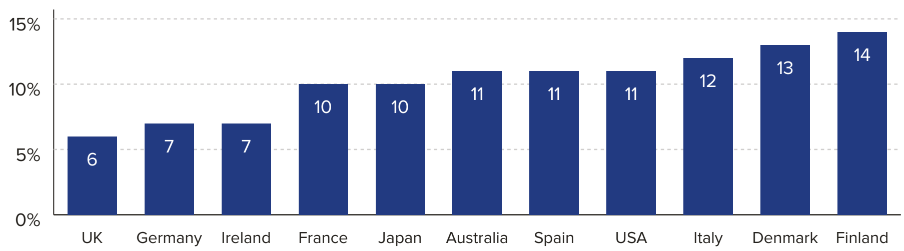
Q7. Have you bought (paid for) a printed newspaper in the last week? (This could be an ongoing subscription or one-off payment for a physical copy.) Please select all that apply. *Base: Total sample in each country.*

/// 3.2 PAYING FOR ONLINE NEWS

The decline in print sales and print advertising has put renewed pressure on newspaper groups to find new sources of digital revenue. But the transition remains anything but straightforward. Returns from digital advertising have been falling for years, made worse by lower rates on mobile. But in general, only a few specialist publishers or heritage brands have been able to charge significant amounts for content in a world when there is so much free news available.

After a sharp upturn in 2012–13 – when a large number of paywalls were introduced – our data show very little change in the absolute number of people paying for digital news over the past year. In most countries the number paying for any news is hovering around 10% of online users and in some cases less than that.

PERCENTAGE PAYING FOR ONLINE NEWS
BY COUNTRY



Q7. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be digital subscription, combined digital/print subscription, or one-off payment for an article or app.) *Base: Total sample in each country.*

TYPES OF PAYMENT FOR ONLINE NEWS
BY COUNTRY

	UK	IRE	GER	JPN	FRA	US	SPA	AUS	ITA	DEN	FIN
Ongoing	71%	31%	60%	76%	51%	67%	49%	70%	45%	71%	69%
One-off	27%	63%	47%	39%	50%	30%	53%	27%	63%	17%	23%

Q7ai. Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? *Base: All who paid for online news UK = 127, Ireland = 107, Germany = 142, Japan = 196, France = 172, US = 255, Spain = 217, Australia = 213, Italy = 244, Denmark = 266, Finland = 207.*

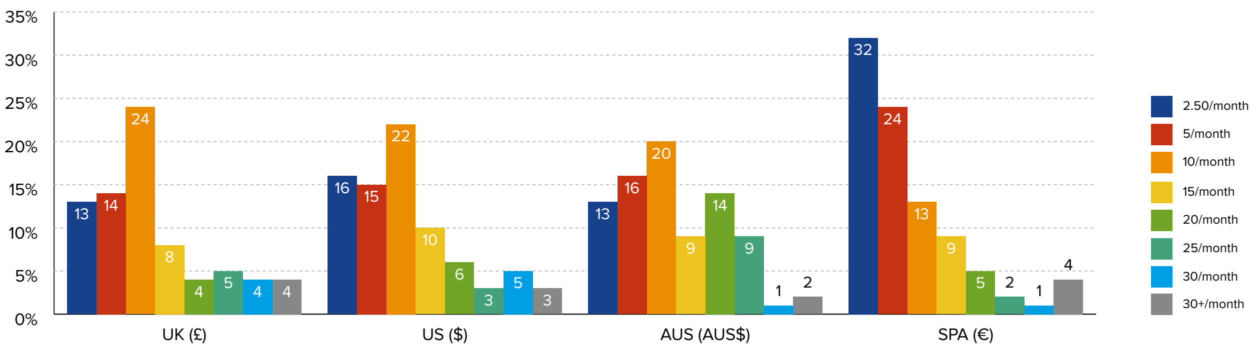
AVERAGE (MEDIAN) MONTHLY PAYMENT

United Kingdom	**£10**
United States	**$10**
Spain	**€5**
Australia	**AUS$10**

These headline figures, however, mask very different yields from paid content online. The US, Australia, and the UK are three countries where news companies have been pushing hard to sign users up to digital or combined subscription packages. In all three countries these ongoing payments now stand at around 70% of all receipts for paid content. By contrast, in Spain smaller one-off payments are the norm.

We can use this data, combined with data about the size of the adult population, to make a rough estimate of the total online news revenue in each country. Despite a smaller overall percentage paying for news, the total revenue in the UK is roughly double that of Spain due to the higher average payment and larger population.

BREAKDOWN IN MONTHLY PAYMENTS FOR ONLINE NEWS
SELECTED COUNTRIES



OPTQ7ciii. How much have you paid for online news content, or for access to a paid for online news service in the last year? Choose the option that comes closest to the amount you have paid. If you have paid to different providers for online news, think only of the single provider you have paid the most to. *Base: All who paid for online news UK = 127, US = 255, Spain = 217, Australia = 213.*

AMOUNT PEOPLE WOULD BE PREPARED TO PAY FOR ONLINE NEWS
SELECTED COUNTRIES


75% wouldn't pay whatever the price

9% would pay £2.50 per month (£30 per year)
4% would pay £5 per month (£60 per year)
1% would pay £10 per month (£120 a year)

Mean payment £4.53 a year


67% wouldn't pay whatever the price

13% would pay $2.50 per month ($30 a year)
6% would pay $5 per month ($60 a year)
3% would pay $10 per month ($120 a year)

Mean payment $8.39 a year


59% wouldn't pay whatever the price

18% would pay €2.50 a per month (€30 per year)
8% would pay €5 per month (€60 per year)
3% would pay €10 per month (€120 per year)
1% would pay €15 per month (€180 per year)

Mean payment €10.02 a year


63% wouldn't pay whatever the price

15% would pay $2.50 per month ($30 a year)
9% would pay $5 per month ($60 a year)
3% would pay $10 per month ($120 a year)

Mean payment AUS$10.14 a year

The picture does not get much better when we ask whether – and how much – people would be prepared to pay online in the future – for brands that they like (see chart left).

OPTQ7civ. What is the maximum price you would pay for a subscription to a digital-only news service – including full access to its website, apps and any digital replicas of the newspaper? *Base: All who had not paid for online news UK=1992, US=1973, Spain=1773, Australia=1805.*

4
ONLINE NEWS IN DETAIL

In this section we look in more detail at online consumption habits: which devices people use to access online news, what types of formats they access, and how they find and share the content they enjoy.

/// 4.1 THE GROWTH OF SCREENS AND NEW PLATFORMS

THE CENTRALITY OF SMARTPHONES

Overall we find that more people are accessing news through a greater number of devices than ever before. The computer remains the most important device for online news, but for many this is now supplemented by heavy usage of smartphones and tablets.

Across all our countries 69% of our sample use a smartphone for any purpose (up from 58% last year) and two-thirds of these (66%) say they used the device for news at least once in the past week.

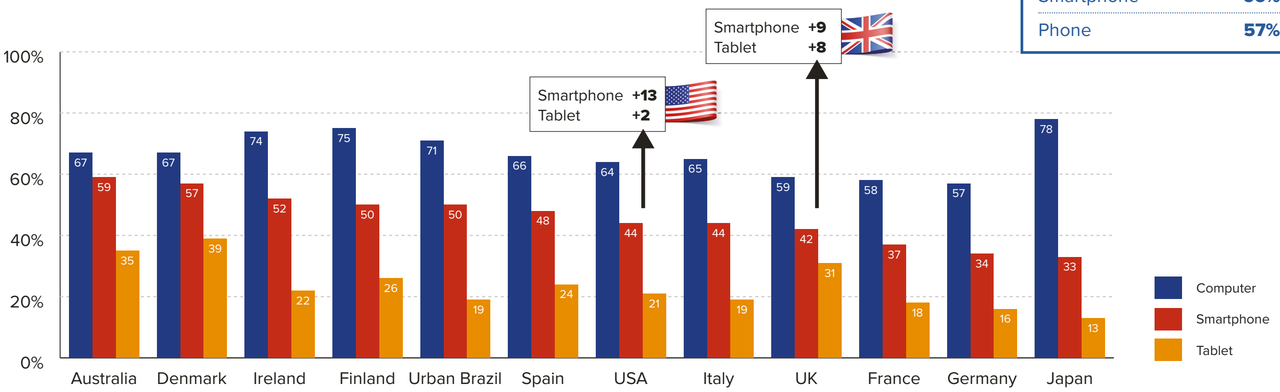
Australia has the highest weekly news usage of smartphones at 59% of our online sample, along with Denmark (57%) and Ireland (52%). The US (+13), the UK (+9), and Japan (+7) have seen the biggest increases in the last twelve months. Tablet growth has slowed in some countries like the US (+2) but the UK has bucked the trend with a significant increase (+8).

Greater penetration of smartphones and tablets has significantly increased the amount of cross-device consumption. Across our entire sample almost half (45%) now use more than two digital devices to access the news, up from a third (33%) in 2013. The number using more than three devices has grown from 9% to 15% in the same time period.

PROPORTION USING DEVICE FOR NEWS WEEKLY

Computer	**86%**
Smartphone	**66%**
Phone	**57%**

DIGITAL DEVICES FOR ACCESSING THE NEWS
ALL COUNTRIES



Q8b. Which, if any, of the following devices have you used to access news in the last week? Please select all that apply. *Base: Total sample in each country.*

IMPORTANCE OF SMARTPHONES GROWS

In many countries these trends mean that publishers now report that the majority of traffic comes from new mobile devices. In the UK, of those who use a device to access digital news, those who say the smartphone is now their MAIN device has risen from 15% to 27% since 2013. That rises to almost half (47%) of those aged 25–34.

In Australia and Ireland almost a third (32%) say the smartphone is most important device they use to access the news. The tablet is most valued in the UK (18%) and Denmark (20%) and least valued in Japan (5%).

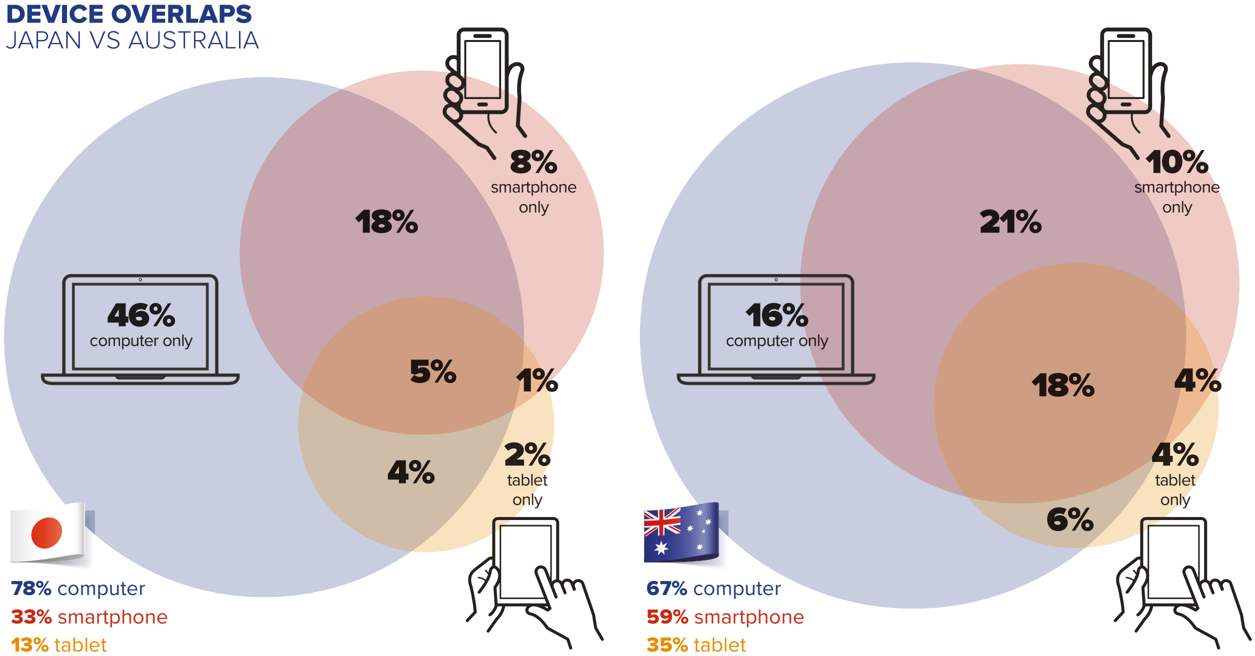
MAIN DEVICE FOR NEWS BY COUNTRY

	UK	US	FRA	GER	SPA	ITA	IRE	DEN	FIN	JPN	BRA	AUS
Smartphone	27%	26%	25%	22%	24%	24%	32%	28%	24%	19%	23%	32%
Tablet	18%	10%	8%	9%	10%	9%	7%	20%	11%	5%	6%	15%

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 who used a device to access news in the last week UK=1795, US=1912, France=1635, Germany=1554, Denmark=1802, Finland=1376, Italy=1707, Spain=1819, Japan=1839, Brazil=1900, Australia=1808, Ireland=1357.*

But the move to multiplatform is happening at different rates. To illustrate the different pace of adoption, we set out the device overlaps for Japan and Australia, two countries at different ends of the spectrum. Just under half of our Japanese sample (46%) still ONLY use the computer to access news each week compared with just 16% in Australia. We see significant overlaps between device use in Australia with almost a fifth (18%) using the computer, smartphone, and tablet in the last week – three times the percentage in Japan (5%).

DEVICE OVERLAPS
JAPAN VS AUSTRALIA



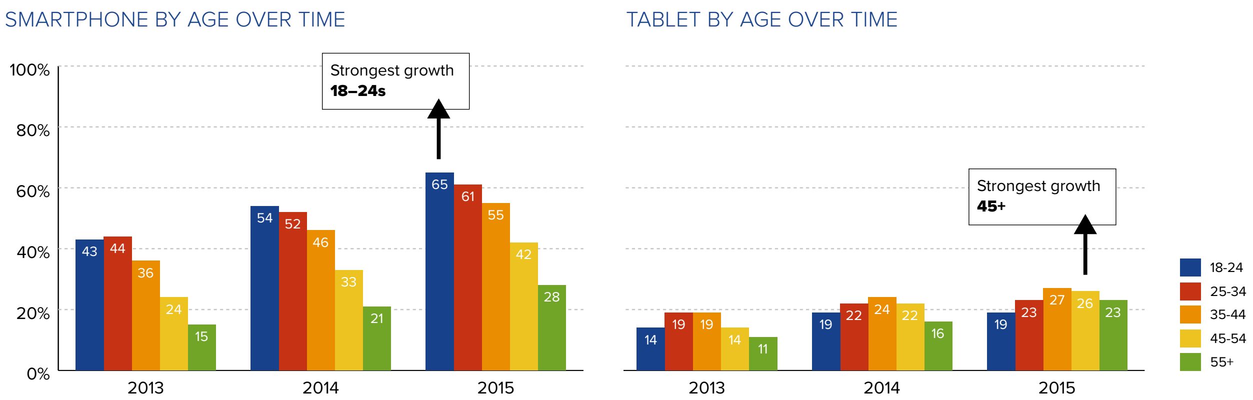
Q8b. Which, if any, of the following devices have you used to access news in the last week? Please select all that apply. *Base: Total sample Japan = 2033, Australia = 2042.*

DEMOGRAPHIC CHANGES OVER TIME

Across our global sample we can see the same trends, with the younger half of the population more dependent on smartphones for news. In stark contrast, the tablet's greater cost and the larger screen size makes this device more popular with older age groups. Under 35s have seen no growth in tablet use for news over the past year (see chart below) and in some countries (Denmark) tablet news usage amongst the young is falling.

As the overall ownership figures rise, both tablets and smartphones are reaching a broader cross-section of news users; parts of the population that the computer has never reached. Almost half of *Daily Briefers* (46%) now use a smartphone for news and 39% of *Casual Users*.

AGE PROFILE FOR SMARTPHONES AND TABLETS
ALL COUNTRIES



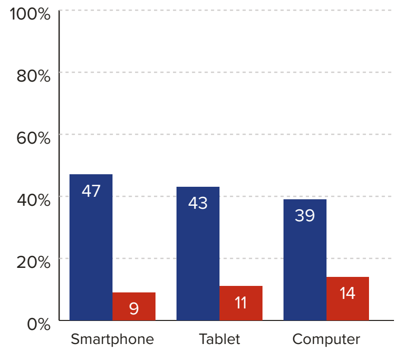
Q8b. Which, if any, of the following devices have you used to access news in the last week? Please select all that apply. *Base: 2013/2014/2015 All = 11413/18859/23557.*

SMARTPHONE USERS CONSUME FEWER NEWS SOURCES

The move to smartphone may be making us less adventurous with our choices. We find that people use fewer sources of news each week when using a smartphone than when accessing news via a tablet or a computer. We asked our respondents to select the sources they used on each device from a given list of top news sources in each country. On a smartphone, across all our countries 47% said they only used one source of news, compared with 39% on a computer – only 9% accessed five or more sources compared with 14% on a computer.

It may be that on a smartphone, where people are often short of time and more task focused, they are happier to stick to one or two brands they trust. On a tablet or computer there may be more time to browse, more time for serendipity.

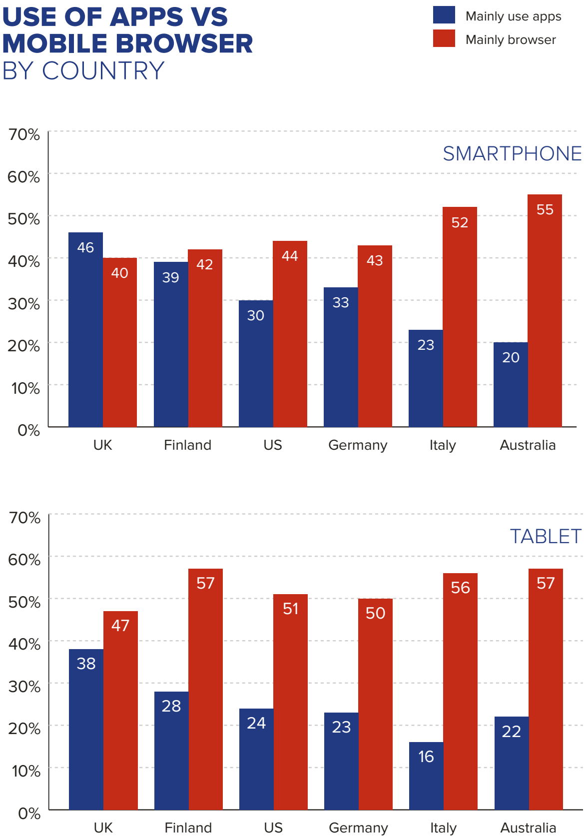
BREAKDOWN OF NUMBER OF SOURCES USED PER DEVICE
ALL COUNTRIES



Q19a/b/c. You say you access news via a SMARTPHONE/TABLET/COMPUTER. When using that device what news sources have you accessed in the last week? *Base: All who used a smartphone/tablet/computer in the last week = 10059/14214/5257.*

NEWS VIA APPS OR MOBILE BROWSER?

USE OF APPS VS MOBILE BROWSER
BY COUNTRY



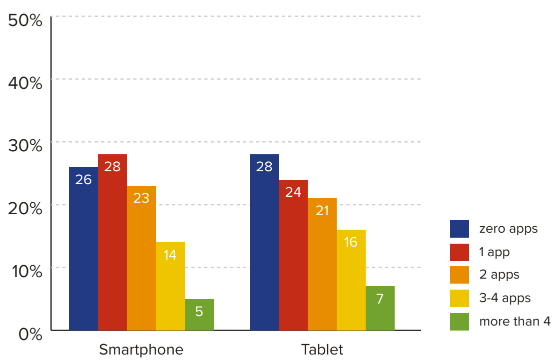
Q9a/b. Thinking specifically about when you look for news on a MOBILE/TABLET, which of the following statements most applies to you? *Base: All who used a smartphone/tablet for news in the last week. UK = 899/675, US = 1005/521, Germany = 700/331, Finland = 775/391, Italy = 927/384, Australia = 1154/730.*

In the last few years most news publishers have created specific apps for mobile platforms – designed to create a slicker, faster experience that links to additional features of mobile operating systems. At the same time they have also spent time and engineering resource in optimising their mobile browsing experience for the small screen.

Against that background, it is interesting to note that in most countries the mobile browser remains the main access point to news. Only in the UK – and only on smartphones – do more people say they use apps than a mobile browser.

In four countries (UK, US, Germany, and Australia) we asked specifically about the number of news apps they currently have downloaded to their device. The average number is just 1.52 for a smartphone and 1.59 for a tablet.

NUMBER OF APPS ON SMARTPHONE AND TABLET
UK, US, GERMANY AND AUSTRALIA



Q9c/d. You said you use a smartphone/tablet for news, how many NEWS apps do you have on your smartphone? *Base: All who used a smartphone/tablet for news in the last week = 3758/2257.*

So in these four countries three-quarters (70% for smartphone and 66% for tablet) have at least one news app on their device but only around a quarter of those who access news on a smartphone or tablet use them each week. This is an illustration of how difficult it can be to keep your brand front of mind on a mobile device. There is higher than average use of news apps in Finland, Denmark, and the UK – countries where strong brands have made an early and decisive move into mobile.

SMARTPHONE AND TABLET OWNERS USING ANY NEWS APPS IN A GIVEN WEEK

	ALL	UK	US	FRA	GER	IRE	DEN	FIN	ITA	SPA	JPN	BRA	AUS
SMARTPHONE	**23%**	27%	25%	23%	18%	26%	26%	30%	17%	21%	22%	25%	17%
TABLET	**19%**	23%	17%	17%	16%	15%	22%	23%	13%	15%	24%	24%	17%

Q11. Thinking of the way you looked at news online (via any device) in the last week , which of the following ways of consuming news did you use? Please select ALL that apply. *Base: All who used a smartphone/tablet in the last week UK=1436/1102, US=1439/899, France=1142/655, Germany=1285/716, Denmark=1590/1134, Finland=1057/620, Italy=1405/827, Spain=1658/906, Japan=899/423, Brazil=1445/690, Australia=1735/1186, Ireland=1122/620.*

TOP NEWS APPS COMPARED
SELECTED COUNTRIES

	Apps on Smartphone	Apps on Tablet
UK	**22% say none; 33% have 1;** Mean number of apps: 1.5	**25% say none; 28% have 1;** Mean number of apps: 1.57
BBC NEWS	51% use the BBC app	55% use the BBC app
USA	**27% say none; 23% have 1;** Mean number of apps: 1.67	**26% say none; 22% have 1;** Mean number of apps: 1.76
FOX NEWS	14% use the Fox news app; 11% use Yahoo news; 10% use a local TV news app	15% use the Fox news app; 13% use a local TV news app; 13% use CNN
Germany	**19% say none, 31% have 1;** Mean number of apps: 1.66	**21% say none, 23% have 1;** Mean number of apps: 1.8
SPIEGEL ONLINE	15% use Spiegel Online	16% use Spiegel Online
Australia	**32% say none, 27% have 1;** Mean number of apps: 1.32	**34% say none, 23% have 1;** Mean number of apps: 1.41
ABC	16% use ABC online / iview	20% use ABC online / iview

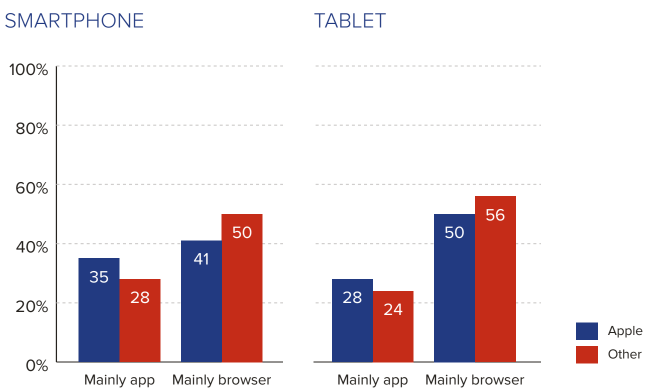
Q9c/d. You said you use a smartphone/tablet for news, how many NEWS apps do you have on your smartphone/tablet? **Q9ei/ii.** You said you use one or more news apps on a SMARTPHONE/TABLET, which of the following brands do you use via an app? Please select all that apply. *Base: All who used a smartphone/tablet for news in the last week UK = 899/675, US = 1005/521, Germany = 700/331, Australia = 1154/730.*

Uniquely in the countries, we looked at, the BBC News app has been downloaded by over half of those who use apps in the UK. Elsewhere the picture is more fragmented.

News Lovers are much more likely to use apps than *Casual Users*. They have also downloaded twice as many news apps to their device (2 smartphone apps compared with 1.06 for casual users). It is not surprising that people who are more interested in news are prepared to invest in a better experience with a brand they like. *Casual Users* are not as prepared to put the effort in; they tend to come across the news in other ways.

Apple users also tend to download more apps. They have an average of 1.7 apps on their iPhones compared with 1.4 for users of other phones.

APPLE USERS VS OTHERS ACCESSING APPS/MOBILE BROWSER
SELECTED COUNTRIES



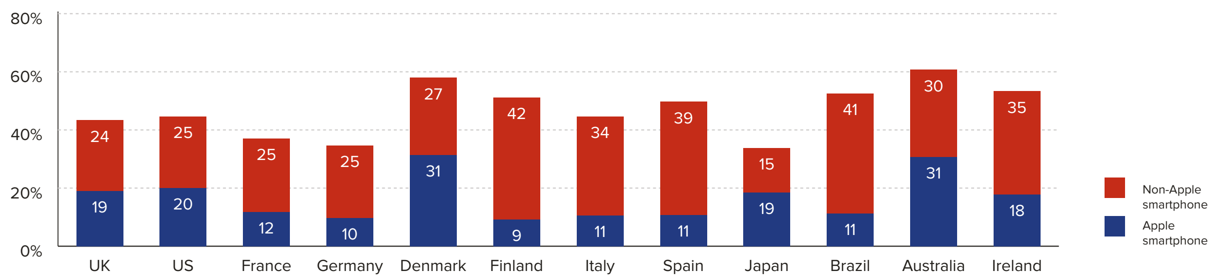
Q8a. Which, if any, of the following devices do you ever use (for any purpose)? **Q9a.** Thinking specifically about when you look for news on a MOBILE/TABLET, which of the following statements most applies to you? *Base: All who used a smartphone/tablet for news in the last week UK = 899/675, US = 1005/521, Germany = 700/331, Finland = 775/391, Italy = 927/384, Australia = 1154/730.*

OPERATING SYSTEMS

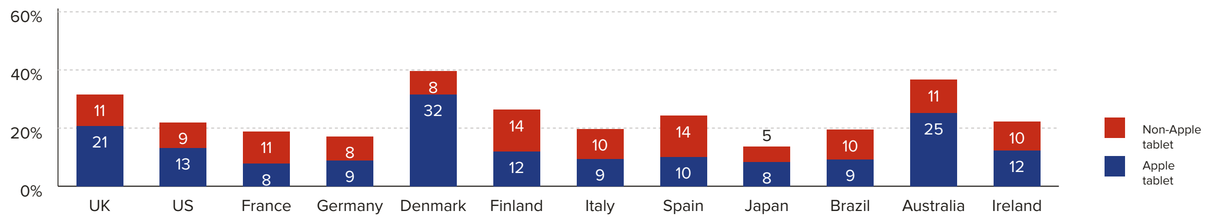
In terms of mobile devices, we find that there are radically different patterns of usage by country. In general, richer Northern Europeans tend to favour Apple devices. The Spanish and Brazilians use predominantly other systems such as Android and Blackberry. Tablets see a more even split with Apple users driving almost half of all news usage.

MOBILE OPERATING SYSTEMS USED FOR NEWS
BY COUNTRY

SMARTPHONE



TABLET



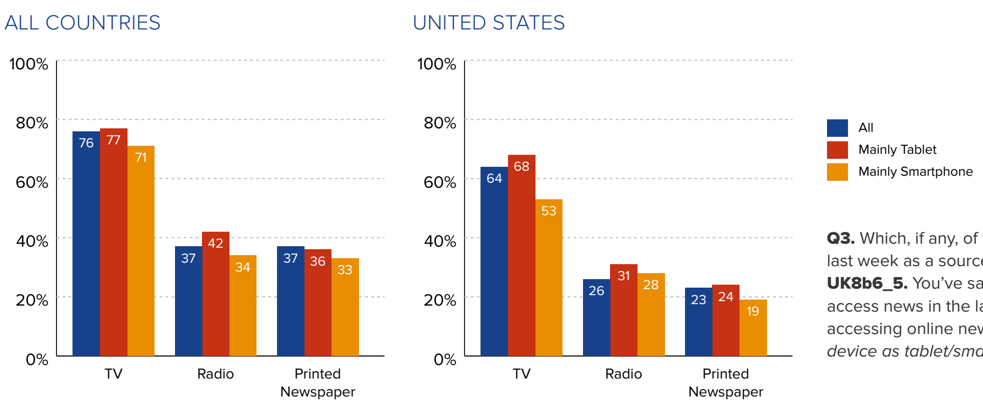
Q8b. Which, if any, of the following devices have you used to access news in the last week? *Base: Total sample in each country.*

MULTI-PLATFORM USAGE EXTENDS OPTIONS

The growth of smartphones and tablets has not generally come at the expense of other media, but is instead increasing the range of options. *Heavy* tablet users are just as likely – or more likely – to consume TV news (77%), listen to radio (42%), or read a printed newspaper (36%) in a given week when compared with the average user.

Heavy smartphone users are a little less likely to read a newspaper or watch TV news in some countries – but this is likely to be as much to do with the younger age profile of smartphone users as the device itself.

PERCENTAGE OF HEAVY TABLET AND SMARTPHONE USERS ACCESSING TRADTIONAL MEDIA



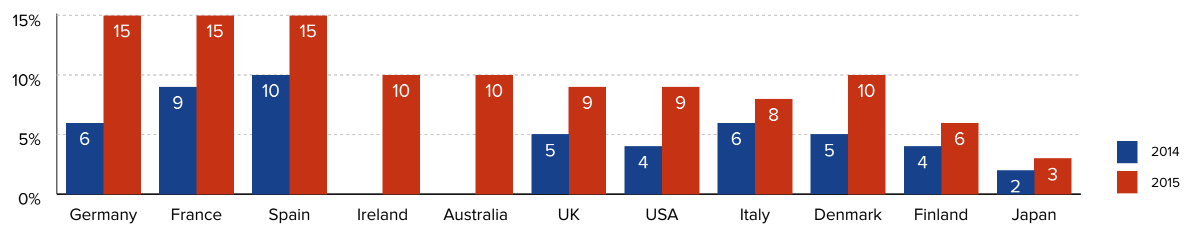
Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply. **UK8b6_5.** You've said you use the following devices to access news in the last week, which is your MAIN way of accessing online news? *Base: All/US = 20577/1985. Main device as tablet/smartphone 5001/506.*

SMART AND CONNECTED TVS

Over the past few years the number of TVs that have direct or indirect access to the internet has grown rapidly. We define smart TVs as having the capability to connect directly to the internet; they often come preloaded with apps for video on demand but also some news apps. Connected TVs normally connect to internet services via a set-top box or other connector such as an Apple TV. Increasingly, these services too offer video- or text-led news services including travel and weather.

Spain, France, and Germany lead the way for smart and connected TVs but in most countries use for news remains relatively modest compared with tablets and smartphones. Even so, broadcasters and news providers are increasingly developing new services such as apps for this platform and there has been significant growth in a number of countries.

PERCENTAGE ACCESSING NEWS VIA CONNECTED OR SMART TVS BY COUNTRY



Q8b. Which, if any, of the following devices have you used to access news in the last week? Please select all that apply. *Base: Total sample in each country.*

/// 4.2 NEW FORMATS AND THE ROLE OF VIDEO

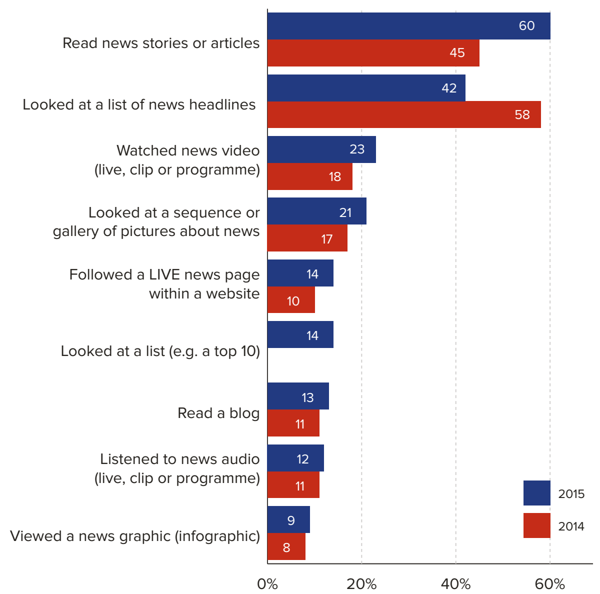
Over the past few years, news publishers have been moving beyond the online 'article' to develop a range of native formats – from quizzes to lists to live blogs to infographics, pictures, and short videos that are made for the web. Many of these formats are specifically designed for consuming and sharing in social networks and other offsite platforms.

In our data this year we see the impact of these new formats and of changing patterns of discovery. Homepages (lists of stories) have become less important over the past year as more people find stories and other content via social networks, search, email, and mobile alerts.

Strong trends towards viral sharing in social networks have helped a range of formats to grow, including individual pieces of content like video, and pictures are becoming more regularly accessed.

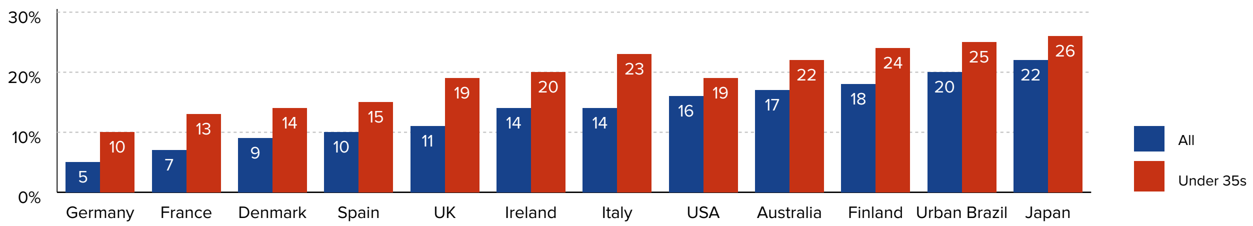
For the first time this year we asked about the list format, popularised by Buzzfeed and the Huffington Post amongst others but adopted by many traditional publishers. The Japanese, Brazilians, and Finns have particularly embraced these formats, but only 5% of Germans and 7% of French access them in a given week (see chart overleaf). Usage of lists is driven by younger groups and by users of new digital-born sites.

PERCENTAGE OF WAYS OF CONSUMING NEWS
ACROSS ALL COUNTRIES



Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select ALL that apply. *Base: All. Note: 'Looked at a list' added in 2015. 'Read news stories or articles' was previously 'Read longer news stories or articles'.*

LIST NEWS CONSUMPTION BY COUNTRY AND AGE



Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select ALL that apply. *Base: Total sample in each country/under 35s in each country.*

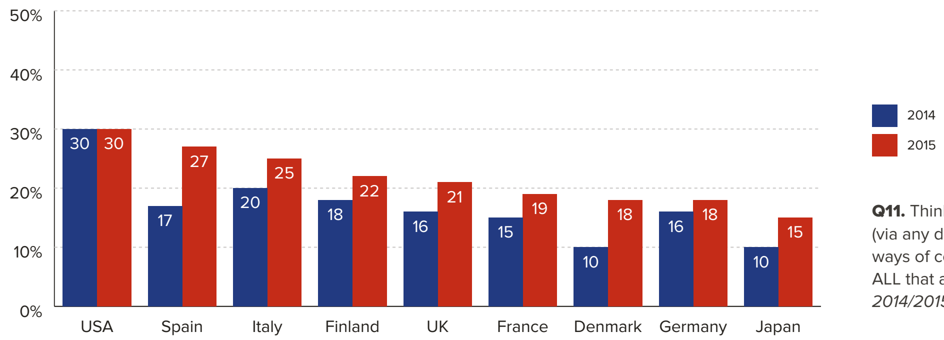
VIDEO USE GROWS SIGNIFICANTLY

News video formats are going through a significant transformation. Traditional Publishers like the *New York Times* in the US, Trinity Mirror in the UK, and *Bild* in Germany have gained audience and advertising revenue through creating a range of video output for their own websites and for distribution through social media.

In our data, we see a significant jump in the use of online news video in all countries except Germany and also in the US, where the big move happened between 2013 and 2014. Almost a third of US audiences still consume video each week (30%), with Spain and Italy catching up with growth of +10 and +5 respectively. There has also been strong growth in Denmark (+8), the UK (+5), and Japan (+5).

We do still however find a number of constraints around the use of video news online. Of those who don't use video, four in ten (40%) said they found reading quicker and more convenient, with 19% agreeing with the statement that videos rarely add anything useful to the text. Older groups are two-thirds as likely to express a preference for a bigger screen. Younger groups, who expect web applications to respond instantly, are more impatient about load times and about preroll advertisements getting in the way of content.

VIDEO NEWS CONSUMPTION BY COUNTRY
2014 AND 2015



ALSO FROM 2015

Australia	**28%**
Ireland	**27%**
Brazil	**26%**

Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select ALL that apply. *Base: Total sample in each country 2014/2015.*

BARRIERS TO VIDEO USAGE
SELECTED COUNTRIES

	UK	US	FRA	GER	FIN	ITA	IRE
I find reading more convenient	41%	39%	33%	37%	46%	40%	43%
Don't add to text story	19%	20%	8%	23%	24%	22%	21%
I can't get them to play properly	7%	11%	6%	6%	6%	11%	8%
Take too long to load up/play	15%	21%	17%	18%	20%	24%	22%
I would rather watch on a bigger screen	29%	23%	16%	20%	19%	16%	26%
Preroll ads tend to put me off	22%	23%	31%	33%	36%	30%	26%
Concern about cost of access (e.g. via mobile)	6%	6%	6%	9%	4%	8%	10%

Q11ai. You said that you don't usually watch news videos online. Why not? *Base: All who did not watch online video news in the last week UK = 1689, US = 1588, France = 1609, Germany = 1622, Finland = 1175, Italy = 1495, Ireland = 1093.*

TYPES OF VIDEO NEWS

Of those who do use video news, consumers access a wide range of video formats. Short news clips (66%) are accessed most regularly; providing eyewitness testimony – particularly on a breaking story – or additional context. This might include a reporter's analysis or an interview with an expert that supports the text content on a page.

Live streams are popular on big breaking-news stories and scheduled events across all genders and ages, but tend to be watched by those who are most interested in news (64% of our *News Lover* category compared with 45% of *Casual Users*). News clips have much wider appeal, including for *Casual Users* who may come across them through browsing on social media.

Clips that add drama to a story were generally most popular but in the US, UK, and Ireland there is more interest in short interviews with journalists or politicians that contextualise the news. Longer news programmes are watched most in France (33%) and Germany (34%), with breaking-news live streams also unusually popular in France (59%).

TYPES OF VIDEO NEWS CONSUMED
SELECTED COUNTRIES

	UK	US	FRA	GER	FIN	ITA	IRE
Live stream (breaking news)	40%	43%	59%	42%	47%	53%	47%
Live stream coverage of other scheduled event (e.g. political, fashion)	19%	25%	36%	28%	23%	37%	24%
News clip that adds drama to a text story (e.g. eyewitness testimony, raw footage of a news event)	52%	52%	44%	51%	48%	47%	47%
News clip that provided context or analysis on a text story (e.g. journalist/politician talking to camera, or a short interview)	48%	59%	38%	38%	40%	35%	51%
Longer news programme accessed on demand (e.g. a stream or download of politics, health, tech, film, food)	15%	18%	33%	34%	15%	25%	16%

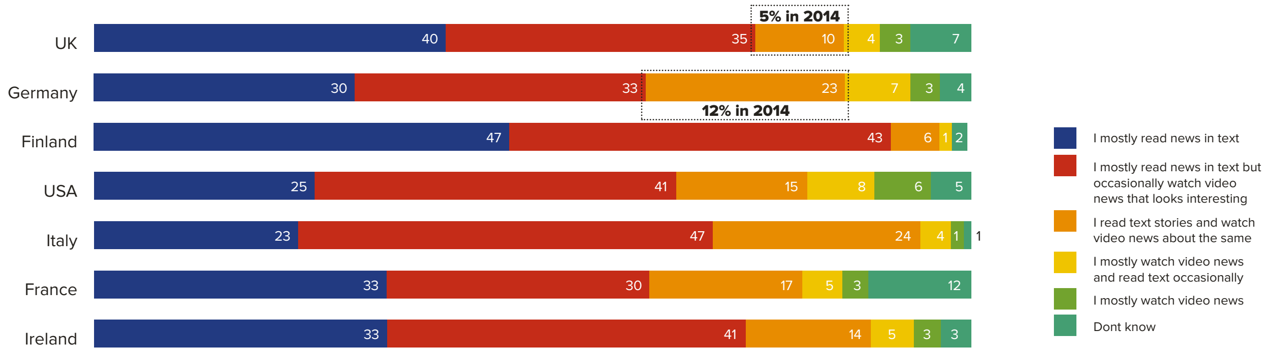
Q11aii. Which TYPES of news video have you watched online in the last month? Please select all that apply. *Base: All who watched online news video in the last month UK = 460, US = 707, France = 382, Germany = 353, Finland = 334, Italy = 511, Ireland = 408.*

In seven countries we asked extra questions about preferences towards video or textual news. In all cases the vast majority preferred to only read text or mainly read text – with video as a supplementary format. Only a small minority – ranging from 14% in the United States to 2% in Finland – actually prefer to access online news in video form.

However in all these countries (apart from Finland) we have seen a significant move towards video usage in the last year, with fewer people saying they mostly read news in text and more saying they occasionally or regularly watch news videos. The number saying they watch and read about the same has doubled in the UK and Germany in the last year.

Overall, video users are more likely to be male, better educated, and more interested in news (*News Lovers*).

ATTITUDES TO VIDEO NEWS
SELECTED COUNTRIES



Q11d. In thinking about your online news habits, which of the following statements applies best to you? Please select one. *Base: UK = 1981, US = 2138, France = 1807, Germany = 1810, Finland = 1288, Italy = 1734, Ireland = 1357.*

/// 4.3 PATHWAYS TO NEWS: HOW AUDIENCES DISCOVER NEWS ONLINE

Although audiences still consume the majority of their online news from familiar and trusted brands, the way they access that content is changing. Our data show very different patterns of access across countries. In countries like the UK, Denmark, and Finland, branded websites are often the starting point for any news journey. By contrast, in Italy, Spain, Germany, or France a search engine is often the key gateway while social media are important in Australia and Urban Brazil.

In Japan, the strength of search is partly down to the dominance of Yahoo as an integrated news and discovery platform while popular new mobile apps like Smart News and Gunosy explain the very high scores for other aggregators.

But within the search category there are important nuances. We asked specifically about the different types of query and found that on average more than half (57%) relate to navigation to a particular website rather than a keyword query. The majority of search queries are effectively a direct pass through to the homepage of the brand. By contrast, social media as a gateway is either driving traffic to individual stories or displaying content that is consumed within the social network itself – without any click through to the publisher website.

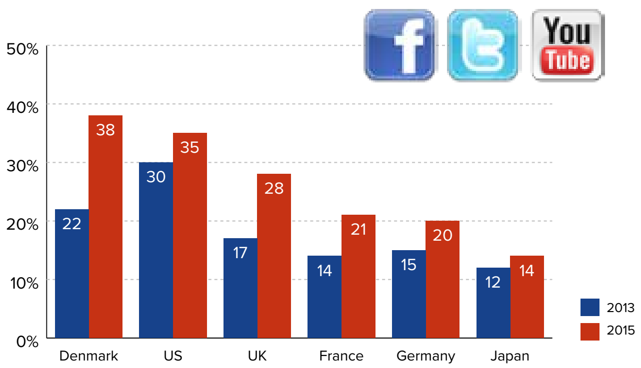
STARTING POINTS FOR NEWS
ALL COUNTRIES

	UK	US	FRA	GER	IRE	DEN	FIN	ITA	SPA	JPN	BRA	AUS
Direct to news brand	52%	36%	27%	26%	44%	54%	63%	20%	36%	15%	46%	33%
Search	32%	40%	40%	45%	46%	29%	26%	66%	54%	54%	52%	49%
Social Media	28%	35%	21%	20%	36%	38%	28%	33%	35%	14%	48%	41%
Email	10%	25%	21%	15%	9%	24%	9%	17%	14%	15%	23%	20%
Mobile notifications and alerts	10%	13%	14%	9%	9%	9%	7%	7%	8%	7%	11%	9%
Other aggregator site, newsreader, or app	4%	5%	6%	5%	7%	9%	12%	6%	11%	27%	17%	8%

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? Please select all that apply. *Base: Total sample in each country.*

Until recently, the main publisher concerns have focused on search but the rise of social discovery (see the chart below) has turned the spotlight on social platforms like Facebook.

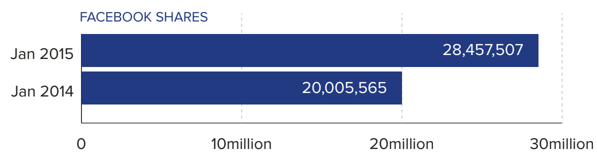
PERCENTAGE USING SOCIAL MEDIA TO FIND NEWS 2013–2015
SELECTED COUNTRIES



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? Please select all that apply. *Base: Total sample 2013/2015 UK = 2078/2149, US = 2170/2295, France = 1016/1991, Germany = 1099/1969, Denmark = 1024/2019, Japan = 1004/2017.*

These findings are backed up by industry data from NewsWhip, which monitors the numbers of shares of publisher-based content across multiple countries and languages.[19] After Facebook changed its algorithms to favour quality news sites at the end of 2013[20] they reported a significant increase in referrals to major sites.

42% GROWTH IN FACEBOOK SHARES OF NEWS CONTENT
JAN 2014–JAN 2015



Facebook shares for top 20 English language news sites. *Source: NewsWhip*

[19] blog.newswhip.com/index.php/2014/07/ultimate-guide-newswhips-social-publishers-rankings.
[20] www.theverge.com/2013/12/2/5168072/facebook-news-feed-algorithm-update-promotes-good-news-over-memes.

This has left many publishers delighted at the amount of new traffic but also concerned about over-reliance on Facebook and in particular about its algorithms, which are changing all the time and over which they have no control.

See Emily Bell, 'The Rise of Mobile and Social News – and What it Means for Journalism', p. 89.

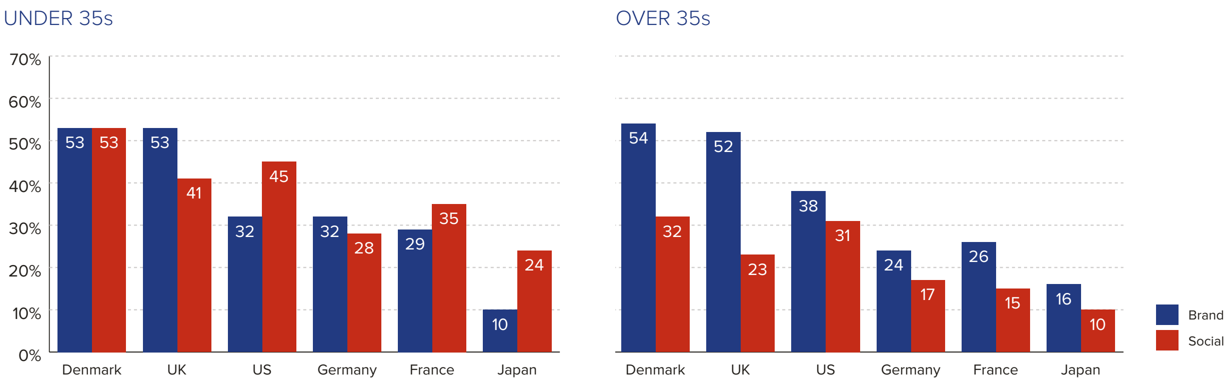
SOCIAL DISCOVERY AND THE YOUNG

A key question for news publishers is the extent to which sites like Facebook and Twitter are friends or enemies. Do they displace the need to visit a website and therefore undermine business models – or can they stimulate interest in distinctive news content and bring new users to the brand? The following charts illustrate the relative importance of brands and social media as ways of starting a news journey. In general, under 35s favour social media but in strong-brand countries like the UK and Denmark they are no less likely to start a journey directly with a brand than over 35s. For them social media are additive, while in the US and Japan they appears to be more substitutional; under 35s there are less likely to go directly to a brand.

The other key point about social news discovery is that it reaches different demographics – and not just the young. Those who visit news sites regularly, sign up for email, or receive mobile notifications are heavily male skewed. Search is more even but social is the only discovery mechanism that appeals more to female users.

We also find that social discovery is a better mechanism for reaching *Casual Users* and those on lower incomes than going directly to a website or using email. These data suggest that social media distribution is becoming a critical mechanism for brands looking to engage with hard to reach audiences.

DISCOVERY OF NEWS BY SOCIAL MEDIA AND BRAND
UNDER 35s AND OVER 35s



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? Please select all that apply. *Base: Under/Over 35s UK = 486/1663, US = 538/1757, France = 353/1368, Germany = 452/1517, Denmark = 568/1451, Japan = 510/1507.*

SOCIAL MEDIA FOR NEWS DISCOVERY
BY GENDER AND COUNTRY

	ALL	UK	DEN	FIN	US	GER	FRA	SPA	ITA	IRE	BRA	JPN	AUS
Male	**42%**	44%	41%	44%	46%	45%	46%	42%	37%	37%	43%	49%	37%
Female	**58%**	56%	59%	56%	54%	55%	54%	58%	63%	63%	57%	51%	63%

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? Please select all that apply. *Base: Total sample in each country.*

OPTIMISING CONTENT FOR SOCIAL MEDIA AND SEARCH

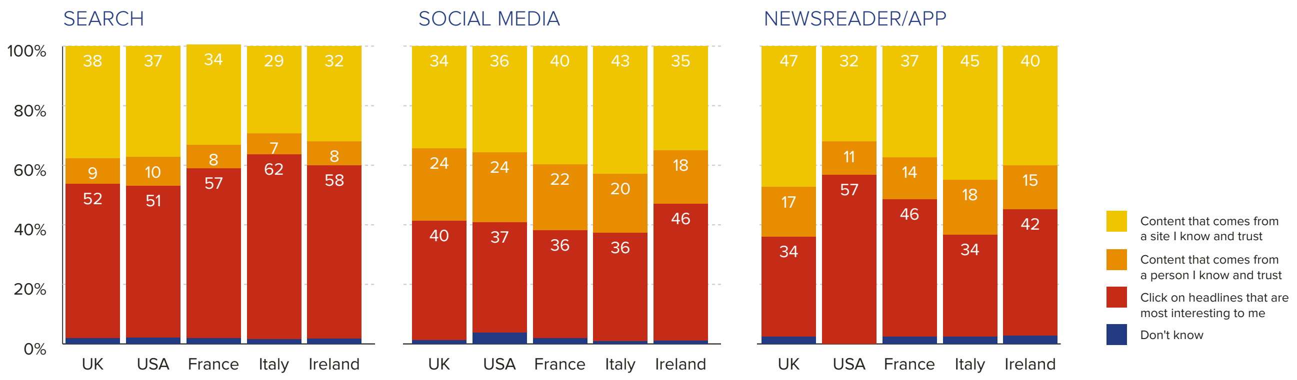
As social media and search have become more critical to business success, publishers have been keen to understand more about what makes users click on a particular link. Search Engine Optimisation (SEO) and Social Media Optimisation (SMO) have become core skills in many newsrooms but there is an appetite to learn more about the key factors that drive success.

To cast light on these questions, we asked a series of questions in five of our countries about the factors driving clicks in search, social media, and also newsreader apps like Flipboard and Smart News.

Overall, we find that the key driver in search is the relevance of the headline. The brand tends to be less important, as does the author of a piece or a social recommendation within the search results. By contrast, in social media the headline is less important than a recommendation by a trusted brand or someone you know. This may be because in search we tend to be looking for very specific information – whereas default behaviour in a social network is to browse a complex multi-subject news feed. Users will be more receptive to signals around quality and trust to help them make that choice.

The role of the brand is, if anything, even more important within newsreader apps that aggregate multiple news sources. This is particularly true in strong brand countries like the UK but one exception is in the US where the headline comes through most strongly.

FACTORS THAT DRIVE CLICKS WITHIN SEARCH, SOCIAL MEDIA, AND AGGREGATOR SITES



Q10a/b/c. You said that you use search/social media/newsreader apps, which one of the following statements do you agree with most? Please choose one. *Base: All who used search/social media/newsreader apps to access news in the last week UK = 674/613/97, US = 925/798/132, France = 808/364/109, Italy = 1315/670/125, Ireland = 697/543/109.*

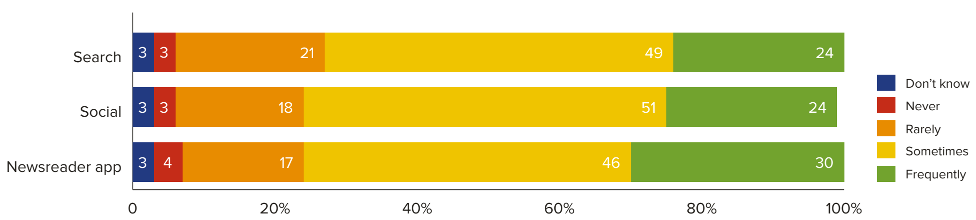
HOW GATEWAYS AFFECT CHOICE

Another question which is of particular interest to academics and regulators is the extent to which these new gateways encourage more or fewer sources of news to be consumed (plurality) and by extension whether might they extend or restrict the range of stories discovered (serendipity).

Here we find that all three mechanisms tend to drive users to click on sources they would not normally use. Three-quarters of social media users (76%), search engine users (73%), and newsreader app users (76%) said they sometimes or frequently accessed different sources compared with their regular brands.

Young people and News Lovers tend to click more on new sources of news from these gateways. A higher proportion of those who say they never click on new sources are over 55.

PERCENTAGE ACCESSING DIFFERENT SOURCES OF NEWS BY GATEWAY
FIVE COUNTRY AVERAGE



Q10ai/bi/ci. When accessing news links through search/social/site or mobile app that pulls together news sources, to what extent do you find yourself accessing different sources of news, when compared with your regular brands? *Base: All who used search/social media/newsreader apps to access news in the last week UK = 674/613/97, US = 925/798/132, France = 808/364/109, Italy = 1315/670/125, Ireland = 697/543/109.*

EMAIL VS SOCIAL MEDIA

A key finding this year is the enduring effectiveness of email as a distribution and retention mechanism for news. Around a quarter are using it to access news each week in the US (25%) and Denmark (24%), although it is much less popular in the UK (10%), Finland (9%), and Ireland (9%).

To some extent email news is making a comeback, partly driven by better targeting technologies and improved user experience. Digital-born news site Quartz has built much of its rapid growth on a well targeted and beautifully curated daily email. Many traditional companies launched new emails in 2014 such as First FT and Red Box, a political briefing from *The Times*.

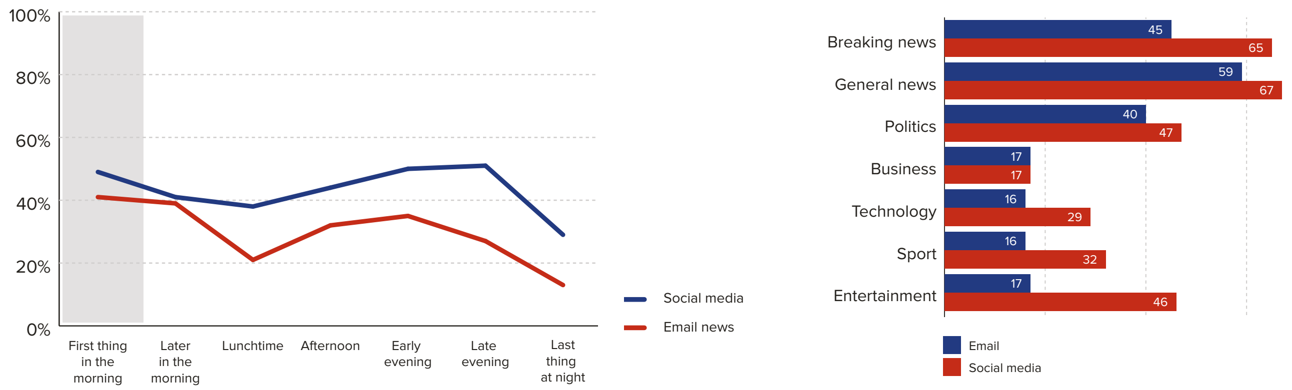
In looking at email and social media in four countries (US, UK, Ireland, and France) we find that, on average, email is used more by older groups, whereas social media are more heavily used by the young. Email tends to be accessed as part of a daily habit, often at the start of the day, whereas social media are used throughout the day, with more of a peak in the late evening. Social media are used more for breaking news, entertainment, sport, and technology, while email is – relatively – more popular for business and politics.

Email is still mainly accessed from the computer, partly due to the older demographics. Social media usage is increasingly driven by smartphones and tablets – again primarily because younger people are using those devices.

EMAIL AND SOCIAL MEDIA COMPARED BY TIME OF DAY AND TYPE
FOUR COUNTRY AVERAGE

WHEN DO YOU TYPICALLY ACCESS

TYPE OF NEWS ACCESSED

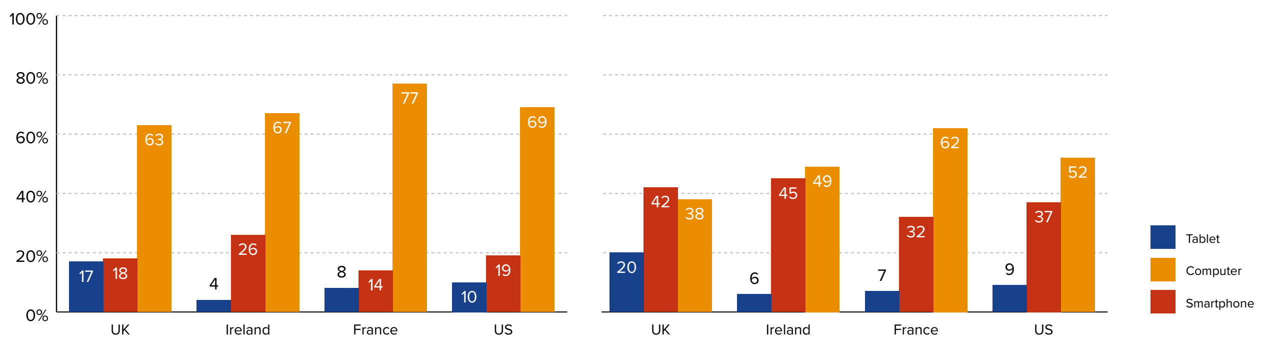


Q10cii/di. You said you came across news via social media/email in the last week, what type of content do you tend to access this way? Please select all that apply.
Q10ciii/dii. When do you typically access social media/email news? Please select all that apply. *Base: All who used social media/email to access news in the last week UK = 613/239, US = 796/623, France = 364/428, Ireland = 543/139.*

ACCESSING NEWS BY EMAIL AND SOCIAL MEDIA BY DEVICE
SELECTED COUNTRIES

EMAIL

SOCIAL MEDIA



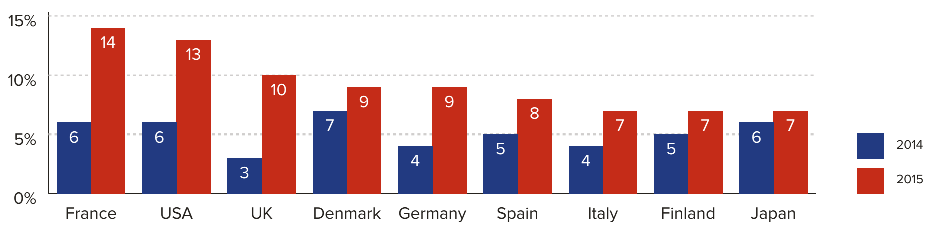
Q10civ/diii. On what device do you most regularly access news from social media/email news? *Base: All who used social media/email to access news in the last week UK = 613/239, US = 796/623, France = 364/428, Ireland = 543/139.*

NOTIFICATIONS AND ALERTS

If email and social media have become primary distribution strategies for media companies, the growth of the smartphone is opening up a new way to attract the attention of consumers. Over the past year, we have seen very significant increases in mobile notifications – for breaking news but also for other updates and messages. France (14%) and the US (13%) are leading this trend, with the UK also showing substantial growth.

One of the benefits of getting consumers to sign up for mobile apps is that they can drive a range of notifications such as an update signal on the app icon to alerts that appear on the lockscreen of an Apple or Android phone. The arrival of smart watches is likely to further accelerate this trend.

GROWTH IN MOBILE ALERTS AND NOTIFICATIONS
ALL COUNTRIES



Q10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? *Base: Total sample in each country 2014-2015.*

/// 4.4 SOCIAL NETWORKS AND THEIR ROLE IN NEWS

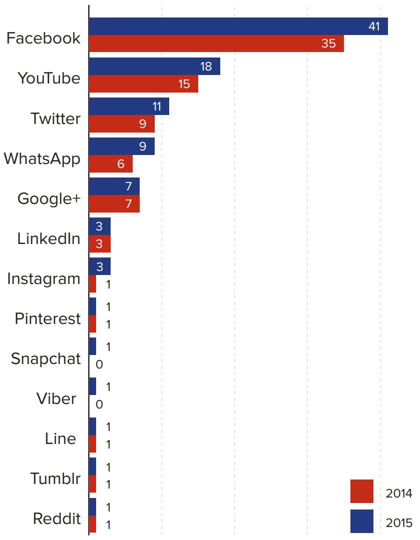
Once again we have tracked the most popular social networks in each country – and the most popular for news. Our unique data from 12 countries show that Facebook, YouTube, Twitter, WhatsApp, and Google+ are by far the most important networks for news in that order, but for younger users Instagram, Snapchat, and Tumblr also come into the picture.

Almost two-thirds of all Facebook users in our sample (63%) use it in a given week for finding, reading, discussing, or sharing news, compared with 57% last year. The proportion of 18–24s using Facebook has also grown, although this group has also started to use a range of other networks much more intensively.

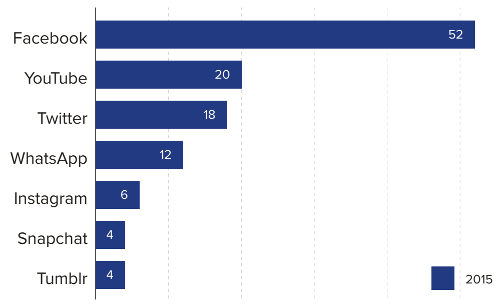
In the US, the biggest growing networks amongst 18–24s have been Instagram and Snapchat – now used by 34% and 32% respectively for any purpose. Although these are still primarily platforms for communicating with friends, there has been more targeting of these platforms for content and 5% of 18–24s in the US now use Snapchat for news. Snapchat Discover, a new platform for brands including CNN, Vice, and Mail Online, launched in the US amid great fanfare just before our poll was conducted.

MAIN SOCIAL NETWORKS FOR NEWS
ALL AGES COMPARED WITH 18–24s

USAGE FOR NEWS (ALL AGES)

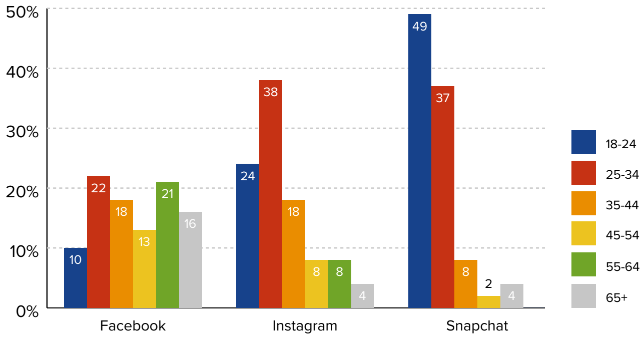


USAGE FOR NEWS (18-24s)



Q12b. Which, if any, of the following have you used for any purpose/for reading, watching, sharing, or discussing news in the last week? Please select all that apply. *Base: 2014/2015 All = 18859/23557, 18–24s = 2424.*

AGE DISTRIBUTION OF DIFFERENT SOCIAL NETWORKS
UNITED STATES

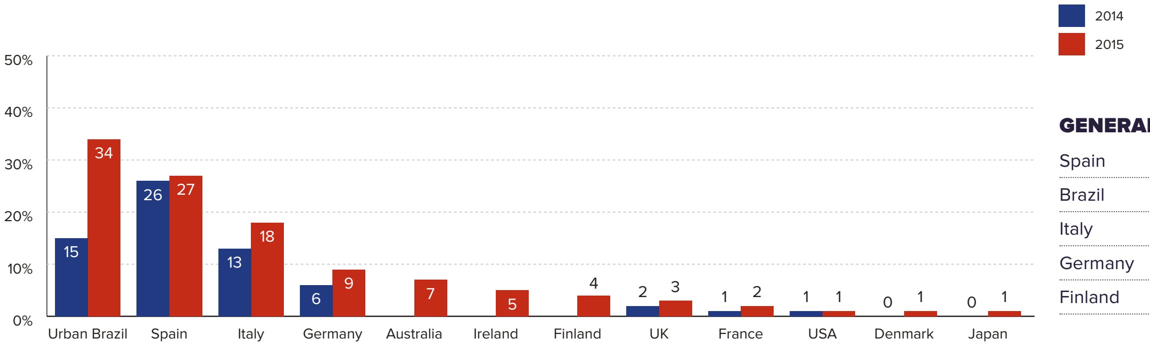


Q12a. Which, if any, of the following have you used for any purpose in the last week? *Base: All who used Facebook/Instagram/Snapchat in the last week US = 1535/294/119.*

Each network has a very distinct age profile, with Facebook spread evenly but Snapchat and Instagram skewing heavily towards under 35s. In the US nearly half of Snapchat users are under 25.

Interestingly WhatsApp, an American start-up now owned by Facebook, has a very small user base in the US (4%). It is much more popular in Brazil (61%), Spain (67%), Italy (49%), and Germany (41%). And a significant proportion of users is looking at WhatsApp for news. In Brazil news usage has doubled to a third of our urban sample (34%).

WHATSAPP USAGE FOR NEWS
ALL COUNTRIES



GENERAL USE 2015

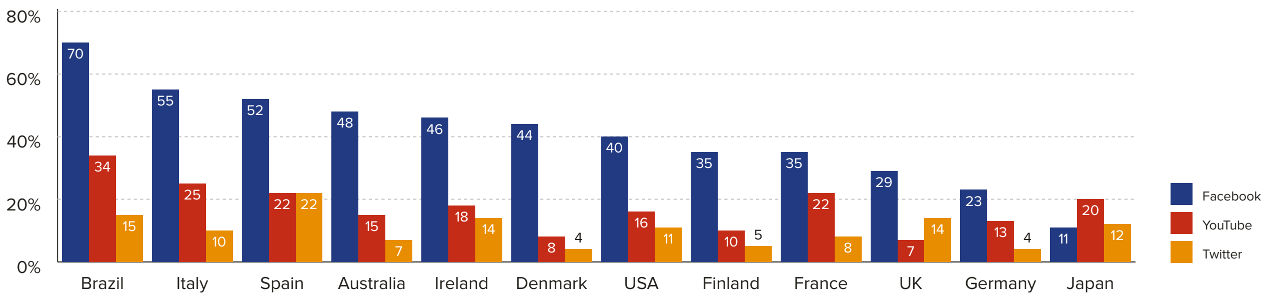
Spain	**67%**
Brazil	**61%**
Italy	**49%**
Germany	**41%**
Finland	**32%**

Q12b. Which, if any, of the following have you used for reading, watching, sharing, or discussing news in the last week? *Base: Total sample in each country 2014-2015.*

Brazil has not only embraced WhatsApp, but it is also the biggest user of Facebook, with over 70% of our urban sample using the network for news in a given week. Japan is the only country where Facebook is not so widely used – partly because users there prefer networks that offer anonymity online.

Elsewhere we see big differences in both the level of social media usage and the extent to which the different social networks are important for news. Twitter is heavily used in Spain, Ireland, and the UK, for example, but much less important in Denmark, Finland, Germany, and Australia.

TOP THREE SOCIAL NETWORKS BY COUNTRY



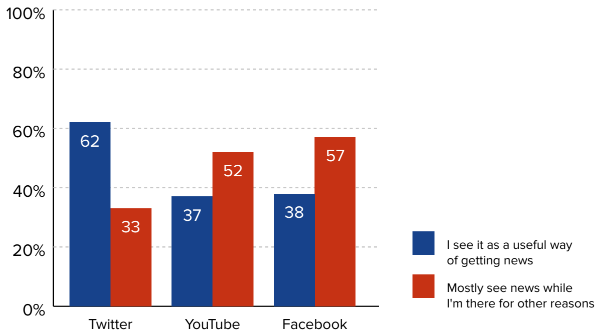
Q12b. Which, if any, of the following have you used for reading, watching, sharing, or discussing news in the last week? *Base: Total sample in each country.*

WE SEEK NEWS ON TWITTER BUT BUMP INTO IT ON FACEBOOK

Although large numbers of people use Facebook and YouTube they are not seen as news destinations in most countries. Respondents who use these sites in the UK, US, Italy, and Australia say they mostly 'see news while they are there for other reasons'. By contrast, Twitter is considered a useful source of news in its own right by two-thirds (62%) of respondents.

We note that Twitter is populated by a relatively high proportion of *News Lovers* (people who have a strong interest in news and access it frequently) while Facebook and YouTube have a much higher proportion of *Daily Briefers* and *Casual Users.*

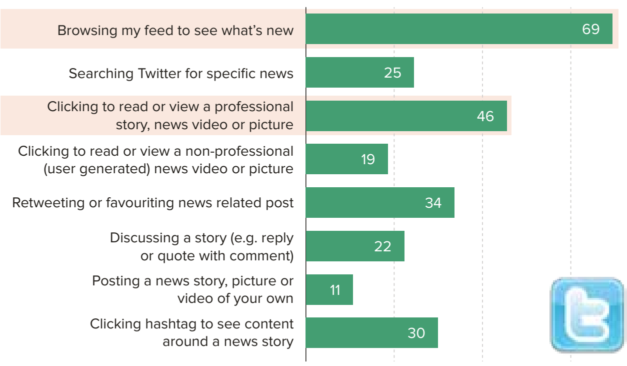
ATTITUDES TOWARDS SOCIAL NETWORKS AND NEWS

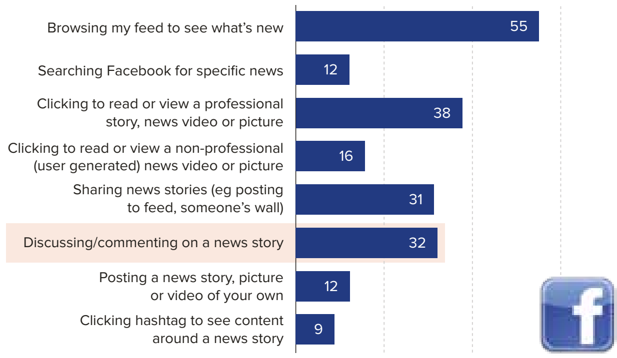


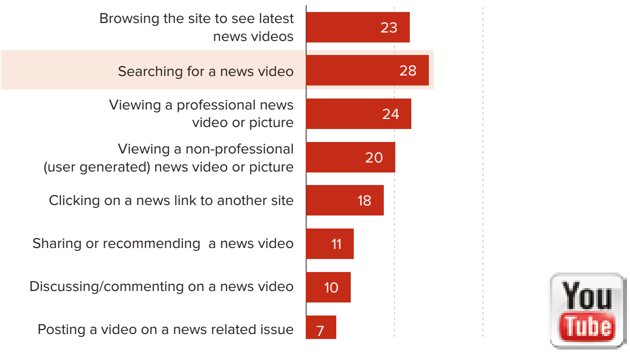
	News Lovers	Daily Briefers	Casual Users
Twitter	18%	10%	6%
YouTube	23%	18%	14%
Facebook	45%	41%	38%

Frequency and Interest Segementation. Q12cii/dii/fi. You say you use Twitter/Facebook/YouTube for news. Which of the following statements applies best to you? *Base: All who used Twitter/Facebook/YouTube for news in the last week UK = 296/610/144, US = 233/917/353, Italy = 191/1094/495, Australia = 141/939/310.*

TYPES OF ACTIVITY IN UK SOCIAL MEDIA







Q12ci/di/ei. You say you use Twitter/Facebook/YouTube for news. How have you used it for news in the last week? Please select all that apply. *Base: All who used Twitter/Facebook/YouTube for news in the last week UK = 296/610/144.*

Our data also show the type of activity regularly carried out in the three networks. Looking at the UK specifically we see that Twitter users are much more likely to be actively checking their feed for what's new (69%) or clicking to view a professional news story (46%). Facebook users are more likely to discuss or comment on a story and YouTube is best for searching for videos.

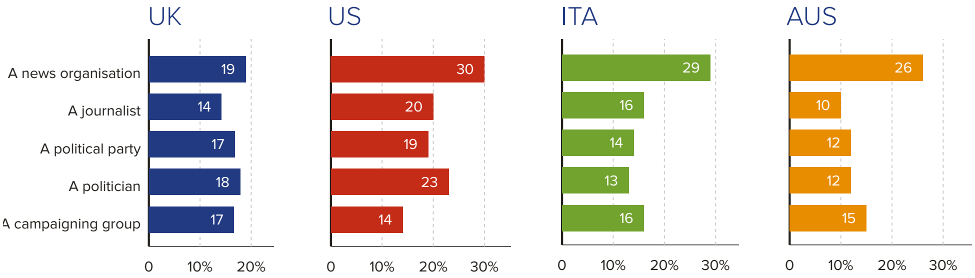
These differences help to explain the type of content that is shared and consumed in these networks. Twitter tends to work better for serious news brands like the BBC and *New York Times*. Facebook tends to favour more accessible content and brands that focus more on entertainment and lifestyle content such as PlayBuzz, the Huffington Post, and Buzzfeed.

The news that is most read, shared, and discussed in social media is produced by professional news organisations. Journalists and news organisations together are directly followed by around a third of users in social media (32%) that we polled in the UK, US, Italy, and Australia. People in the US and Italy are most likely to follow journalists, while those in the UK and the US have the greatest tendency to follow politicians and political parties.

In the US over a quarter of social media users (28%) have followed or subscribed to the feed of a politician or political party. That equates to roughly a fifth (19%) of the total adult population.[21] In other countries, we find around a fifth of social media users are following politicians or parties.

This group tends to be male, shares news frequently, consumes news heavily (high proportion of News Lovers), and uses a large number of mainstream news sources as well. Political sources are supplementing not replacing traditional sources.

FOLLOWING JOURNALISTS AND POLITICIANS ON SOCIAL MEDIA



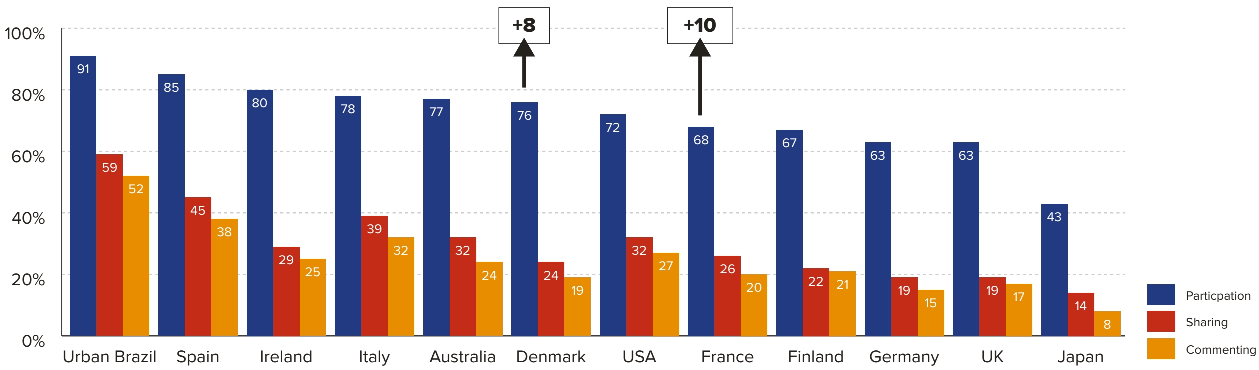
Q12g. When accessing news through social media like Facebook, Google+, YouTube, or Twitter, have you subscribed to or followed any of the following? Please select all that apply. *Base: All who used social media for news in the last week UK = 867, US = 1249, Italy = 1521, Australia = 1244.*

/// 4.5 PARTICIPATION AND ENGAGEMENT ONLINE

Over the past four years we have been tracking a range of participation metrics around news. The next two charts show the overall percentage of respondents who interacted with news in one of 12 different ways.

Here, we see different participatory cultures at play. Latin and Mediterranean countries actively engage far more often and in a greater range of ways. Our two new countries, Ireland and Australia, are also comfortable participating and discussing news online – just as they tend to do offline. Some Northern European countries like Germany, the UK, and Finland tend to be more reserved, while Japanese respondents are even less likely to share or comment directly on news online.

TOTAL PARTICIPATION, SHARING AND COMMENTING BY COUNTRY



Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. *Base: Total sample in each country.*

In most countries, levels of participation are relatively stable but we have seen significant shifts in Denmark and also in France, where our survey was conducted in the aftermath of the *Charlie Hebdo* attacks.

In all countries we find that more people are willing to share than to comment – and sharing of news online has increased in many countries over the past year. Of those who comment, there are more people posting news via social networks than there were in 2013 but slightly fewer using news websites. This trend towards more conversations happening off-platform has led some news websites to close their message boards and forums over the past year.

[21] Calculation assumes 87% of US adults use the internet (Pew), 79% of internet users use social media (Pew), and 28% of news reading social media users follow politicians (RISJ).

TYPES OF PARTICIPATION BY COUNTRY

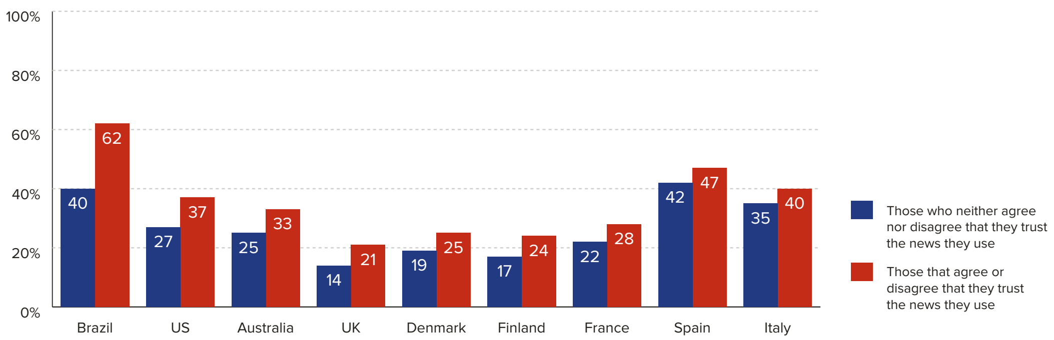
	US	UK	GER	FRA	IRE	DEN	FIN	SPA	ITA	BRA	JPN	AUS
Share via Social Network (SN)	21%	14%	13%	18%	21%	19%	18%	34%	30%	47%	9%	21%
Share via email	17%	7%	10%	13%	13%	7%	6%	21%	16%	28%	6%	16%
Rate or like story	16%	8%	14%	18%	14%	20%	11%	32%	16%	17%	5%	16%
Comment in SN	21%	13%	11%	15%	19%	16%	16%	32%	25%	44%	6%	19%
Comment on news website	15%	7%	6%	8%	10%	7%	8%	12%	13%	20%	4%	10%
Write news blog	4%	1%	2%	3%	2%	1%	2%	5%	4%	5%	2%	1%
Post picture to SN	10%	4%	6%	9%	10%	9%	8%	17%	10%	20%	3%	10%
Post picture to news sites	3%	1%	4%	5%	4%	3%	1%	7%	8%	12%	2%	3%
Online vote	25%	15%	14%	22%	16%	14%	15%	21%	18%	19%	4%	14%
Campaign online	5%	5%	6%	6%	5%	3%	4%	7%	6%	7%	2%	7%
Talk to friends online	26%	16%	15%	18%	24%	21%	15%	32%	20%	44%	8%	30%
Talk about news face to face	45%	42%	40%	33%	52%	58%	46%	48%	42%	45%	24%	54%
Total	**72%**	**63%**	**63%**	**68%**	**80%**	**76%**	**67%**	**85%**	**78%**	**91%**	**43%**	**77%**

Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. *Base: Total sample in each country.*

Motivations for sharing are of intense interest to news organisations and to academics. Studies have shown that content that drives a strong emotional response (either positive or negative) tends to become viral.[22] Our data suggest that someone's level of trust in the news may also be a factor.

In most countries, those who said they trusted or distrusted the news were more likely to share the news than those who neither trusted nor distrusted it. This association was not significant in Japan, Ireland, and Germany.

TRUST AND THE IMPACT ON SHARING



Q6b. Thinking specifically about news sources that you use, do you agree or disagree with the following statement? "I think I can trust most of the news that I use most of the time". **Q13.** During an average week in which, if any, of the following ways do you share or participate in news coverage? Using code for sharing news via social media or email. *Base: Total sample in each country.*

Though it may be tempting to assume that those who trust the news they consume would be more likely to share it, in most countries there was no significant difference in sharing news between those who trusted their news and those who distrusted it. This may point to the use of news sharing for the purposes of both criticism and 'collaborative verification'.

It is clear from all the data in this report that we have seen a significant increase in the discovery and sharing of news through social networks over the last few years. People are using social media far more as a source of news and as a filter of news. But in most of our countries this has not been mirrored by an increase in participation.

A quarter of us (25%) may comment about news online each week but three-quarters don't. Only 3% write a blog on a political or news issue, 5% take part in an online campaign. Online may bring us more convenience and control over when and where we access the news but it hasn't transformed our experience and our relationship with news brands to the extent that many hoped – at least not yet.

[22] 'What Makes Online Content Viral', http://ldi.upenn.edu/uploads/media_items/virality.original.pdf.

5 ESSAYS

MIND THE GAP

James Harding
Director, BBC News

Let us start with two observations, emerging both from the Reuters Institute *Digital News Report* and daily life in the newsrooms of the BBC.

One is that the world is changing both more quickly and more slowly than we expected. On the one hand, smartphone use is revolutionising the news, particularly for younger people. On the other, TV bulletins and radio programmes are the way millions of people prefer to get the news - and will be for years to come. (Indeed, the BBC's TV news audiences are holding up surprisingly strongly in the UK and growing, rapidly, around the world.)

The other is that the digital future is fabulous, but it is not fair. The internet is enabling us to tell more stories in more engaging ways to more people than ever before. But there is a widening information gap between people online and those offline, an emerging generational divide in news consumption, a greater imbalance in reporter numbers between news organisations and uneven patterns in the fewer stories that seem to get ever bigger audiences and the many more that do not.

For any news organisation, but particularly for the BBC, these two trends present a singularly difficult challenge: how do we keep everyone informed? We all need reliable information to make good decisions – for ourselves, our communities, the country we live in and the world we share. How do we best serve traditional media habits, while anticipating new ones so that everyone can access the real story?

INFORMATION INEQUALITY

In January, the BBC published the first part of a report on the Future of News. It set out a range of views about what is happening in the news industry as a whole - and what changes in technology, people and stories might mean for news organisations in the next decade.

The report made the case that, for all of the benefits of digital growth – and there are many – this is an age of growing information inequality.

Sir Tim Berners-Lee said: "Around 40% of people in the world use the web so for the other 60%, every time the power of the web increases and it's possible to do more things online, those 60% are left further behind. To a certain extent, the web is increasing the gap between the have and the have-nots."

I will not dwell on inequality relating to digital access as this is a digital report. Information inequality takes many other forms – with people less well informed because the news industry speaks to some groups in society more than others, because the modern media offers ever more alternatives to the news, because people are overwhelmed by communications or because the nature of the internet and, in particular, social media, can sometimes lead them to an incomplete picture. The findings from this year's *Digital News Report* offer further support to the idea that there are growing inequalities, even amongst those who do access the internet for news.

DAILY ACCESS TO NEWS BY AGE AND INCOME
ALL COUNTRIES

18–24	25–34	35–44	45–54	55+	LOW INCOME	MEDIUM INCOME	HIGH INCOME
75%	81%	85%	89%	92%	83%	87%	90%

Older → Richer →

Q1b. Typically, how often do you access news (via TV, radio or online)? *Base: All = 23557.*

GENERATIONAL DIVIDE

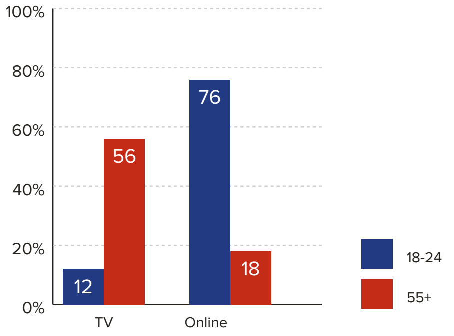
The world increasingly divides into those who actively seek out the news, and those who skim or even avoid it. When it comes to news consumption, we saw in our Future of News work that the information gap between younger people, poorer people, and some ethnic minority groups on the one hand, and older people, richer people, and some groups of white people on the other, is widening.

A generational divide has always existed within news. In the 2015 *Digital News Report*, 86% across the countries said they get the news at least once a day – but this falls to 75% amongst 18-24s and rises to 92% among those aged 55+. A change in the way young audiences consume the news is already well under way and, in the last year, has accelerated.

Younger audiences are turning away from TV news bulletins, and towards mobile (and increasingly, online video and new visual formats). In the UK, 56% of over 55s said the TV was their favourite news source, compared to just 12% of 18-24s (76% of this younger age group chose online).

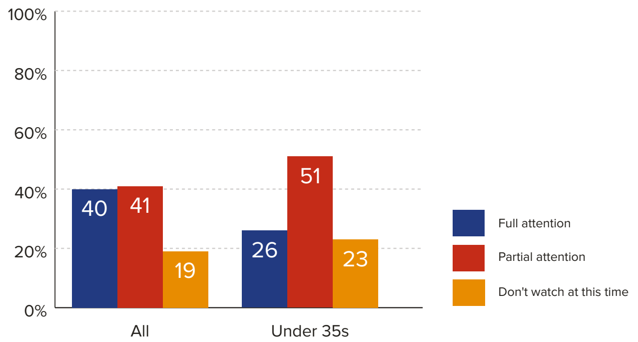
Even when watching TV, the second screen can be a distraction to attention – half of those who watch TV news said they are regularly distracted by other things (higher amongst under 35s) and 8 in 10 under 35s (82%) said this distraction is from a second screen (emails, social media, web browsing).

MAIN SOURCE OF NEWS
UK



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: 18-24s/Over 55s who used a source of news in the last week UK = 219/898.*

DISTRACTION AROUND EVENING TV NEWS
UK



THOSE WHO PAY PARTIAL ATTENTION SAY THEY TEND TO DO THESE TASKS WHEN WATCHING TV...

Device	All	Under 35s
Check social media feeds	27%	49%
Check email computer	43%	48%
Browse web generally	42%	56%
Play online games	18%	25%
ALL SECOND SCREEN	**73%**	**82%**

Q4A_5. Thinking about the way you watch TV news in the early evening do you give it your full attention/ do something else at the same time? *Base: All/Under 35s who watched TV news at particular times in the last week UK=1656/267.* **Q4ai.** On those occasions when you give TV news only part of your attention, what are the other things you tend to do? *Base: All/Under 35s who watched TV news in the last week but only gave it part of their attention UK=1402, U35s=248.*

This year's data shows a quickening towards mobile news-use overall, with the smartphone emerging as the central platform for digital news.

What does the rise in smartphones and decline in TV mean for attention and engagement with news? Within use of BBC News on mobiles, we see more skimming, with shorter session durations – although there could be changes in the future, with the 2015 Digital News survey showing the proportion overall saying they read stories online having risen (overtaking just reading the headlines) and online news video also up (now 31% amongst 18-20s).

DIFFERENT GATEWAYS TO NEWS

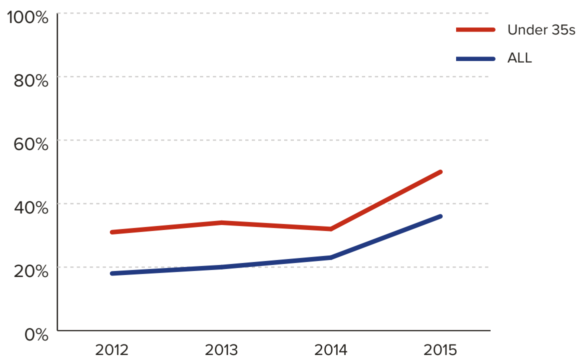
Audiences are increasingly getting news via social media. In the UK, the percentage of those using social media as a source of news has risen significantly in the last year – up from 23% to 36%.

This year, we also see an increased role for Facebook in how people find, discuss and share news. WhatsApp and Instagram have further cemented Facebook's position with young audiences.

The increasing importance of search and social as gateways to news has raised concerns over the degree to which it gives users a filtered view – and Emily Bell at the Tow Center for Digital Journalism has pointed out that the internet is not necessarily a neutral curator of the news. That said, this year's survey has new data that suggests news-users tend to feel that these services help them find more diverse news and lead them to click on brands they do not normally use – and news organisations see the huge value of social media in reaching audiences less likely to come to news websites.

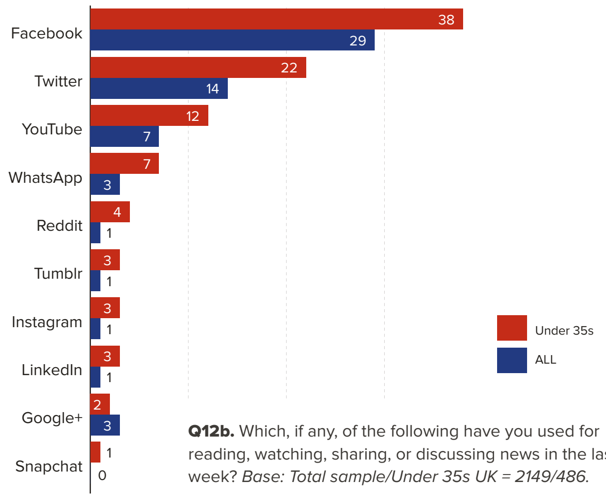
GROWING INFLUENCE OF SOCIAL MEDIA FOR NEWS
UK

SOCIAL MEDIA AS A SOURCE OF NEWS



Q3. Which, if any, of the following have you used in the last week as a source of news? *Base: Total sample/Under 35s 2012-2015 UK = 2173/2078/2082/2149, 675/555/502/486.*

TOP SOCIAL NETWORK FOR NEWS



Q12b. Which, if any, of the following have you used for reading, watching, sharing, or discussing news in the last week? *Base: Total sample/Under 35s UK = 2149/486.*

ADDRESSING INFORMATION INEQUALITY

It is clear that the growth of digital is overwhelmingly beneficial to audiences and news organisations. But the internet is not keeping everyone informed, nor will it. And news organisations – particularly those with a mission to serve a universal audience, like the BBC – must try to address that gap.

To do that, the BBC's oldest values are key to its future: trust – rooted in a commitment to accuracy, impartiality, diversity of opinion and fair treatment of people in the news – is the BBC's most prized asset. It is what will make people come to the BBC in the ever noisier marketplace for information on the internet.

But we will also need to experiment – in what we do, in how we look, in how we sound. We will need to be even more open to having content on other platforms. We will have to keep on innovating in our storytelling. We will have to give much more power to people to select, scrutinise and shape the news.

This year's Reuters Institute *Digital News Report* will focus minds. It will also underline two headaches. The first is caused by the need to meet the enduring requirements of old media habits, while racing to get ahead of the possibilities of new platforms. The second is brought by the need to embrace the exciting possibilities of news in the internet age, without losing sight of the information gaps it is creating.

To keep everyone informed – i.e. to fulfil the democratic purpose of the news – we will have to grasp both broadcasting to mass audiences and personalised services streaming to the individual; both breaking news in quick snaps as well as investigations, analysis and reporting that have the benefit of time and slow consideration; news for both big screens on the wall and small ones in the hand.

Our aim, though, is singular: to be the place people come for the real story – what really matters, what is really going on, what it really means. In the internet age, the mission of BBC News remains the same – to inform.

THE RISE OF MOBILE AND SOCIAL NEWS – AND WHAT IT MEANS FOR JOURNALISM

Emily Bell
Director, TOW Center for Digital Journalism, Columbia University Graduate School of Journalism

News consumption is undergoing two fundamental shifts across the globe. One is the rise in news audiences accessing journalism through their phones and mobile devices, the other, related to this trend, is the increase in people who read or watch news through social platforms, such as Facebook, YouTube, Snapchat, WhatsApp, or Twitter. This report documents that these two trends are not national phenomena confined to the US or just a few markets. They are playing out all over the world.

What is perhaps most important about this development is the speed of the change, and the profound change it signals for journalism organisations. The existential question of a decade ago 'who is a journalist?' was born out of the access of the general populace to publishing tools. Now the question has been replaced by 'who is a publisher?' Protocols like Twitter and social platforms like Facebook are being joined by messaging services such as WhatsApp (owned by Facebook) and Snapchat. News organisations have realised that, in order to reach readers or viewers, particularly in younger demographics, they have to publish through these platforms.

> These trends are not national phenomena confined to the US or just a few markets. They are playing out all over the world

The overall effect of this shift has been to affect how journalism is produced. Perhaps the most forward thinking of the 'new' news organisations is the US company Buzzfeed, which has managed to raise in excess of $70 million in venture capital funding and has rapidly grown to a monthly reach which rivals many older and traditionally larger organisations. Buzzfeed has been built around the proposition that distribution of journalism will happen primarily through social networks. It has expertise in understanding how social platforms spread news stories, and what formats of journalism work best on the real-time social web. Buzzfeed does not care very much what its homepage looks like because it doesn't expect people to visit it as a 'destination site', but rather to encounter the news through social feeds.

WHO CONTROLS THE PATHWAYS TO THE AUDIENCE?

If Buzzfeed is correct in its strategic direction (and it is already being emulated by many legacy news organisations), then the control of pathways to audiences no longer lies with the organisations which publish news but with the platforms that carry it. In my 2014 Reuters Memorial Lecture,[23] I outlined this new relationship between the social media companies born in Silicon Valley and news publishers and journalists as creating a new paradigm. The free press is now controlled by companies whose primary interests are not necessarily rooted in strengthening public discourse and democracy. On the one hand, journalists can reach far greater audiences immediately than was the case in the past. On the other hand, journalists and publishers have very little control now over how information reaches the world and there is limited transparency.

Facebook does not see itself as a publisher, it only sees itself as a platform. But once Facebook is the world's front page, publishing responsibilities begin to attach themselves to the company. The most clear example of this is the process by which Facebook decides which news to feature in the feeds of its users. If it only features news which is recommended by friends and family, then Facebook's users might miss an important event. Does the Facebook news algorithm take into account other factors, like how recently the news happened? Does it worry about whether the stories that its users are spreading are true? Does it get rid of stories which might be deliberately biased or misleading? Does it want to show us

[23] reutersinstitute.politics.ox.ac.uk/sites/default/files/Speech%20-%20Silicon%20Valley%20%26%20Journalism%20-%20Make%20up%20or%20Break%20up_Emily%20Bell_Reuters%20Memorial%20Lecture%202014.pdf.

stories which are videos before it shows us stories which are text? Each decision means reprogramming the algorithm which selects types of news stories. Facebook might see this as an engineering task, but these simple decisions are also editorial.

The Facebook effect spreads beyond simply offering a platform and into actually shaping journalism. In the coming years we will increasingly see news organisations employing journalists who are there to report directly onto social sites exclusively. Over time, if it makes economic sense for technology companies to employ more explicitly editorial staff, such as Facebook's 'content curators' who effectively perform an editing function, then we might see social media companies more consciously expanding their editorial role.

The Facebook effect spreads beyond simply offering a platform and into actually shaping journalism

HOW CAN PUBLISHERS RESPOND TO THE RISE OF PLATFORMS?

It does not look as though this trend inspired by the rising importance of smartphones is going to slow down anytime soon, and it is certainly never going to reverse altogether. News organisations are stuck as to how to respond, particularly as they lack any scale or technological solutions that might match those created by Silicon Valley. In America at the beginning of 2015, Facebook initiated an experiment with publishers whereby it would publish whole articles or videos instead of just publishing links to them. The rationale for the development was that links to external sites slowed down the way news reached readers.

News organisations are stuck as to how to respond, particularly as they lack any scale or technological solutions that might match those created by Silicon Valley

Most surprising was that news organisations like the *New York Times* signed up to a greater loss of control by being one of the first organisations to participate in the test. (Others are said to have been approached but declined to take part; most have not been asked.) The idea that an organisation so apparently dedicated to the control of its own brand would take this route is a signal of how much changed behaviours in news audiences is forcing even the most resolute organisations to make compromises. This is a decision every publisher has to make. The trade-off between control of your own journalism, versus reaching large audiences, is inevitable for both national and international media.

Fragmentation of news provision, which weakens the bargaining power of journalism organisations, has coincided with a concentration of power in platforms. The only remaining question is how fast will we see a shift from the old models of distribution to the new?

HOW CAN PLATFORMS DEAL WITH PUBLISHING?

The conundrum of how social platforms should handle news is made more complicated by the fact that their internal structures and code are highly commercially sensitive. How Google, Facebook, and Twitter make their money is by using data to meet the needs of advertisers and users. If we can see exactly how they do that, then their businesses lose a competitive advantage or their algorithms could be 'gamed' by unscrupulous third parties.

An absence of data, or rather the secrecy of that data, about what happens between the creation of news and how it is consumed, creates commercial problems for publishers and raises broader issues for democracy. In Europe there is a highly regulated media environment. Even in the US commercial broadcasters are licensed to operate. By contrast, the largely Silicon Valley-based companies which are growing vast influence in this area remain largely untouched by media regulation in the US (though they are of course subject to copyright, patents, etc.), and strenuously try to avoid it in Europe and other markets.

Fragmentation might mean that we can no longer even identify what news media are, let alone check that plurality and equality of access are guaranteed. We can no longer really know which stories are being promoted the hardest or which are suppressed with any degree of certainty. Social media companies and other technology companies that control information channels – Apple via its App Store for instance – have become dominant players in global news distribution by accident rather than by design and we are still grappling with how to address this new order.

THE FUTURE OF JOURNALISM

As journalism becomes ever more dependent on these new distribution platforms to find audiences, news publishers are forced to examine their business models and strategies for the future. If a news company wishes to reach a large audience on the web it has little choice but to develop relationships with third-party platforms, but this puts revenue models and decisions over the ultimate shape of journalism even further into the hands of software companies.

Will Facebook and their peers become news organisations? Should news companies create their own technologies? Can regulation step in to take a more significant role in bringing transparency to these new processes? These are all important questions. I suspect that in each case at least part of the answer is 'yes'.

What about news audiences? For the news consumer there is a lot to be said in favour of the new environment. The real-time world of news and events fits in your pocket. The social web is a great empowering force for information and journalism. However, the civic impact of having the paths to audiences controlled by largely US-based social platforms is as yet unexplored. Understanding of where these clear trends are taking us ought to be a major policy issue, just as it is already a major business issue.

The next phase of development is already upon us. Messaging services like WhatsApp are growing more quickly in some parts of the world and among a younger demographic than platforms like Facebook. These platforms are, if anything, even further removed from the broadcast environment we are all used to as a driver of news and discussion.

Existing journalism businesses and new entrants into the market must have a strategy to deal with their future which is centred on mobile distribution and which accepts that there is little they can do to control the environment in which their journalism is distributed. News businesses, which thought the shift from an analogue model to a digital model was painful and fraught a decade ago, now have to make even greater adjustments. Social platforms which felt they could maintain their status as 'just a platform' and avoid the implications of bearing publishing responsibility are also realising that this is untenable. What follows will reshape journalism more profoundly than we once could have imagined. This might be good news for consumers, but in terms of civic and democratic health, the jury is still out.

Existing journalism businesses and new entrants into the market must have a strategy to deal with their future which is centred on mobile distribution and which accepts that there is little they can do to control the environment in which their journalism is distributed

THE BUSINESS OUTLOOK: CONSTRAINTS ON GROWTH, BUT SOME HOPEFUL SIGNS IN DIGITAL NEWS PROVISION

Professor Robert G. Picard
North American Representative, Reuters Institute

Overall consumption of news on digital platforms is growing, reflecting the rising penetration of smartphones and tablets and the access they provide customers to digital news throughout the day. Growth in the number of paying digital news consumers, however, has slowed and it appears that the number of paying users in many countries is stalling at a lower level than many news organisations hoped.

The majority of news consumers obtain news without payment from free news sites, aggregators, and social media, but some heavy news users seek out specific news sources they trust – and are willing to pay for them.

Digital advertising expenditures are growing globally, but the primary beneficiaries are large internet firms such as Google, Facebook, and Yahoo. News providers are developing strategies to try to gain more of the available advertising expenditures, but those must contend with the larger firms' dominance of digital ad provision infrastructures and the fact that news represents only a portion of overall digital media use.

The overall picture is one of low growth in paid content consumption and a digital advertising market that is not highly favourable for news providers. However, some firms are finding ways to overcome these challenges, benefit from market opportunities, and make digital news provision a viable and sustainable business through sophisticated service strategies with multiple revenue streams.

DEVELOPMENTS IN PAID CONTENT

Consumers who are now paying for digital news, combined with those who indicate they are willing to pay in the future, now make up a significant proportion of national populations, but average about half the level of those who pay for print newspapers (for the nations in the *DNR* study, the average is 24% compared to 46% who report they pay for print news). Growth has slowed or plateau-ed in many countries, and it appears that digital news providers are struggling to grow the total market for paid news.

CURRENT AND POTENTIAL MARKET FOR PAID NEWS ONLINE

	UK	US	FRA	GER	IRE	DEN	FIN	ITA	SPA	JPN	AUS
Paying for news	6%	11%	10%	7%	7%	13%	14%	12%	11%	10%	11%
Likely to pay*	6%	10%	8%	8%	12%	10%	7%	17%	15%	14%	12%
Total	**12%**	**21%**	**17%**	**15%**	**19%**	**23%**	**20%**	**29%**	**26%**	**24%**	**23%**

Q7a. Have you paid for ONLINE news content, or accessed a paid-for ONLINE news service in the last year? (This could be digital subscription, combined digital/print subscription, or one-off payment for an article or app.) *Base: Total sample in each country.* **Q7aii.** You said you have not paid for online digital content in the last year... How likely would you be to pay IN THE FUTURE for online news from particular sources that you like? *Showing very likely to pay/somewhat likely to pay. *Base: Total sample in each country.*

PAYING FOR PRINT (WEEKLY)

	UK	US	FRA	GER	IRE	DEN	FIN	ITA	SPA	JPN	AUS
Paying for print	46%	35%	45%	47%	54%	31%	45%	51%	48%	61%	34%

Q7. Have you bought (paid for) a printed newspaper in the last week? (This could be an ongoing subscription or one-off payment for a physical copy.) *Base: Total sample in each country.*

Nevertheless, news organisations worldwide are reporting some growth of revenue from digital subscriptions on various platforms and consumers are being allowed to purchase weekly, monthly, and annual subscriptions, and, in some cases, daily access. The *New York Times*, for example, now offers subscription packages that bundle free digital access with a print home delivery subscription and separate digital-only bundles that provide differing access via the web, smartphones, and tablets.

NEW YORK TIMES DIGITAL SUBSCRIPTION PACKAGES

NYTimes.com, *plus smartphone*	**$3.75 per week**
NYTimes.com, *plus tablet*	**$5.00 per week**
Unlimited Digital *(NYTimes.com, plus smartphone and tablet)*	**$8.75 per week**
Times Premier *(NYTimes.com, smartphone and tablet, T books, talks, etc.)*	**$11.25 per week**
Opinion section only	**$1.50 per month**
Crossword subscription	**$6.95 per month**

Subscription has become news providers' preferred method for revenue because it leads consumers to purchase more content overall and produces greater stability in the revenue stream. Those offering multiple subscription packages, with access to different amounts and types of content, appear to be more successful at widening the group of consumers that is willing to pay. Some are offering different levels of paid access, with higher prices for access to premium or specialist content offerings and services, and these are helping increase overall use and revenue.

Many news providers who instituted paywalls in the past with generous metering policies are now reducing the number of free articles in an effort to turn regular free readers into paying customers and increase revenue. *Gazeta Wyborcz*a in Poland, for example, quadrupled its digital subscribers in two years to more than 55,000 using a combination of a tighter metering system and a premium content tier system that provides some free content, some basic paid content, and different types of paid premium content. About one-quarter of all its total customers (print and digital) are now digital subscribers.

The *Financial Times* is continuing to sharpen its digital payment strategy. Last year the number of digital subscribers rose 21% to 504,000, about 70% of its total readership. This spring it abandoned its longstanding metered model in favour of a hard paywall and it is accompanying the change with a marketing campaign promoting low-cost trial subscriptions in an effort to attract regular but lighter users.

The central factor in willingness to pay is the perception that the value of paid content is higher than that of free content.

News providers trying to create or improve value must produce more original digital content while at the same time making it more relevant and valuable to each paying user.

This requires extensive knowledge of individual consumers and is why news providers such as *The Globe and Mail* in Canada are investing heavily in data systems that provide regularly updated information to circulation, advertising, marketing, and editorial managers.

O Globo in Brazil is employing a sophisticated strategy data acquired across its free content on its own platforms, search, aggregators, and social media. The company is targeting heavy news consumers most likely to subscribe and offering them various subscription options to turn them into regular customers.

Although data strategies are being improved in many organisations the tools for doing so still remain rough and do not yet follow consumer usage well across platforms. Business and financial news providers and providers with specialist coverage and analysis tend to have the highest growth in paid digital users and some are closer to making a transition away from print.

One of the more successful apps has been Economist Espresso, a daily digest of short stories, which induced 175,000 existing *Economist* subscribers and 25,000 new users to subscribe. This indicates that the majority of mobile subscribers are resulting from providing added value to existing subscribers rather than new ones.

Some news organisations, such as the *Guardian* and the *New York Times*, that have desirable and well-known special features such as crossword puzzles, are disaggregating that content and offering separate subscriptions for those unwilling to subscribe to all their content, thus increasing their overall revenue.

Despite a great deal of digital product development and innovative marketing strategies, the primary customers of paid digital news remain the heavy news users who already paid for news delivered in other ways. Efforts to widen the paid audience among those who do not otherwise pay for news have not been widely successful. Highly trusted brands, however, have been able to use the digital advantages to gain new subscribers from geographic areas their print editions did not serve.

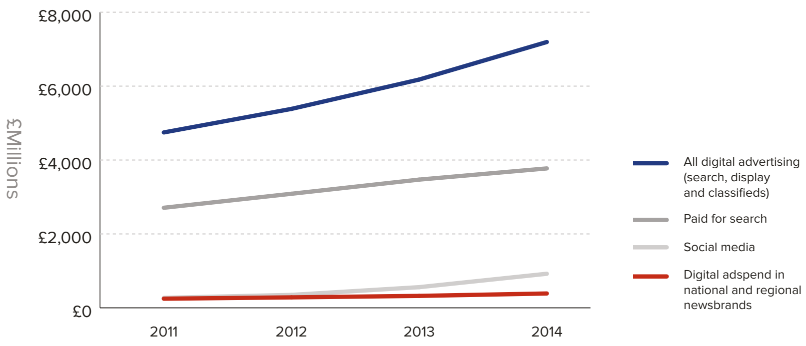
A CHALLENGING ADVERTISING MARKET

Advertisers continue to move increasingly larger portions of their expenditures to digital media, especially mobile media, but the primary beneficiaries remain the large US-based search engine, aggregators, and social media firms at the global level, as well as the national level in much of the world.

Digital advertising revenue remains a challenge for news providers and it is not going to contribute as large a portion of income as it has for offline operations. This is because the inventory of advertising opportunities far exceeds that of print and broadcasting, reducing demand, and depressing prices paid for digital advertising. Consequently, digital firms require very large numbers of users to gain sufficient advertising to produce a large revenue stream. In addition, most digital advertising does not provide the display advertising benefits that continue to attract large advertising purchases by major department and grocery stores.

The digital environment is also less friendly to advertising than the offline environment because software allows consumers to block advertising messages, particularly on personal computers, and many consumers are now employing them.

DIGITAL AD SPEND VS AD SPEND FOR NEWS BRANDS
UK ONLY



Sources: IAB, News Digital Ad Spend from Advertising Association/Warc Expenditure Report

News providers are working to increase the prices by improving the connection of users to relevant advertising messages through better user data management, by improving the presentation of advertising messages, and by creating advertising alliances with other news providers that collectively generate greater exposure for advertisers.

The *Guardian*, *Financial Times,* CNN International, and Reuters established Pangea this year to jointly sell and deliver digital advertising to their high-quality audiences on various platforms, bypassing Google, Facebook, and other major online players who are less willing to share customer data needed to better service the audiences.

Mobile advertising – targeting smartphones and tablet users – is growing, but the number of news providers effectively capturing advertising revenue remains low because much of the advertising is delivered by intermediaries who do not share, or share little, revenue and because necessary consumer data – especially across platforms – is not yet available to make its value to advertisers less ambiguous.

News providers would like to derive a revenue stream from consumption of news shared on social media, but few are gaining much revenue today. Significant issues are how advertising revenue should be split and the sharing of users' data. Companies such as Facebook and other social media operators are powerful intermediaries and that will make it even tougher for news providers to make money as more content moves off their sites and apps to social media.

Despite the general growth of digital advertising expenditures, advertisers are not fully satisfied with the performance of digital advertising. It was reported that more than half of digital ads served are not actually seen by users.[24] Many are now allocating more of their expenditures to other activities such as search placement fee, content marketing, and sponsored content.

A GROWING EMPHASIS ON VIDEO AND MULTIMEDIA

News providers are increasingly providing news video to consumers, with larger organisations producing some original video and smaller organisations relying on video from video agencies or links to video at other providers.

Some companies are using video to improve advertising sales and delivery through the use of preroll, midroll, and postroll videos. The advertising rates for digital advertising included with video are generally higher than that for other forms of content, but it is uncertain whether that pricing advantage will continue as the amount of video content increases. Some news providers are obtaining additional revenue from sponsored video content, such as documentaries and other short- and long-form video. Sponsored content creates concerns for highly reputable news organisations noted for their independence and original content, however, so it is not expected to play a significant role in their revenue.

WHERE IS DIGITAL NEWS PROVISION GOING?

Contemporary developments and trends suggested a number of conclusions about the nature of the digital news market. Only a few large, well-established news brands are likely to achieve the scale and volume of consumer and advertising necessary for success at the global level and we will see competition to be in that group increase in the coming years.

Even as companies pursue such global ambitions, they will need to localise content, a factor that has led the *Guardian* to establish newsrooms and separate editions for its US and Australian editions. Another approach is to offer services in multiple languages, as the Huffington Post has done in French, German, Spanish, Italian, Portuguese, and Japanese.

[24] www.thinkwithgoogle.com/infographics/5-factors-of-viewability.html.

National brands enjoy some level of protection in their domestic markets and a few in each country are likely to garner the bulk of domestic digital consumer and adverting revenues. News providers in smaller markets – Finland and Australia, for example – may find that getting the majority of news providers to simultaneously implement paywalls will lead to more rapid acceptance of paying for content, as occurred in Canada.

The outlook for local digital news remains uncertain. It is proving difficult for local news providers in many countries to gain large numbers of paid digital users – one exception being Canada where more than three-quarters of all newspapers now charge for digital content – and the ability to attract and survive on digital advertising varies widely.

Venture capitalists are watching developments carefully. Few have invested directly in digital operations of legacy news providers, but a number have invested in related services such as content payment systems, digital advertising services, and data management systems, and some have invested in commercially oriented start-up news providers such as Vox, Buzzfeed, and Vice.

Many in the industry continue to hope that paid content use will rise and that those increases, combined with better data and knowledge about the users, will create the ability to better match content and advertising with specified users in ways that increase its value and permit higher prices for content and advertising.

The constraints on and requirements of the digital news provision business are becoming clear. This is a highly competitive space that requires clear strategies and the flexibility to create multiple revenue streams necessary to produce levels of income required for sustainability.

GENERATION GAPS – UK NEWS CONSUMPTION AND THE IMPACT OF AGE

Alison Preston
Head of Media Literacy Research at Ofcom

This essay reminds us of the diverse ways in which different generations consume and think about their news media. The analysis covers three core areas:

- people's motivations for following news in general;
- the devices, platforms, and sources people use for news, including whether these vary according to the different types of news accessed;
- a particular focus on online news consumption and which types of format are used and for which reasons.

I focus on the UK picture, but make some indicative comparisons across other countries – France, Germany, Spain, Japan, and the US – to see whether the differential use of news platforms by age follows a similar pattern.

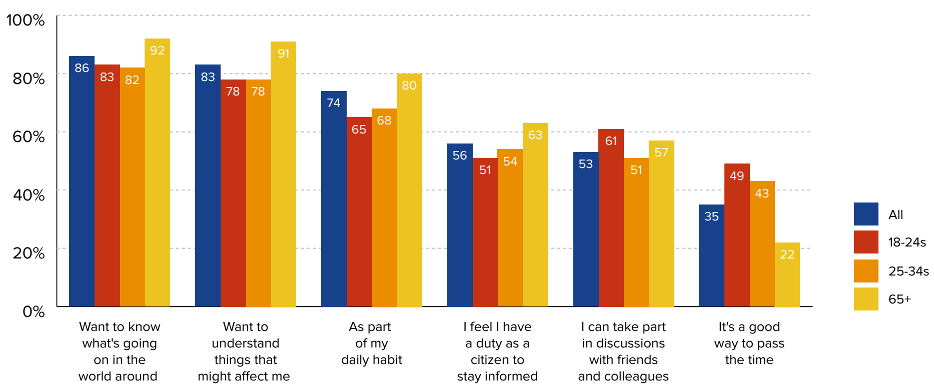
It is important to note, as indicated elsewhere in this report, that respondents to this survey are online users, and as such findings which relate to 'offline' consumption are likely to be under-represented.

MOTIVATIONS FOR FOLLOWING NEWS

> Motivations for following news are more about convenience and being social for younger people; more about civic duty and habit for older people

We asked respondents about the reasons they had for following news, and the first chart shows their agreement with a range of possible reasons. While eight in ten of those aged 65+ say that following news is part of their daily routine, only two-thirds of 18–35s choose this response. However, twice as many younger people as older people are likely to follow news as a 'good way to pass the time' – half of 18–24s (49%) say this compared to one in five (22%) of those aged 65+. This is likely to relate particularly to smartphone or out of home news consumption, perhaps fitting this into their daily routines while travelling.

REASONS FOR FOLLOWING THE NEWS BY AGE
FIGURE 1



Q2a. People have different reasons for following the news. To what extent do you agree or disagree with each of the statements below? I follow the news because... *Base: Total sample UK = 2149.*

The intensity of motivation for following news is greater for those aged 65+, and appears to be more related to elements of civic duty and a desire to understand the world around them. For younger people, motivations are more likely to revolve around the convenience of news, and its benefits as a social activity.

Older people are more likely to use TV for news; younger people are predominantly online although their use of 'traditional' media sources remains substantial

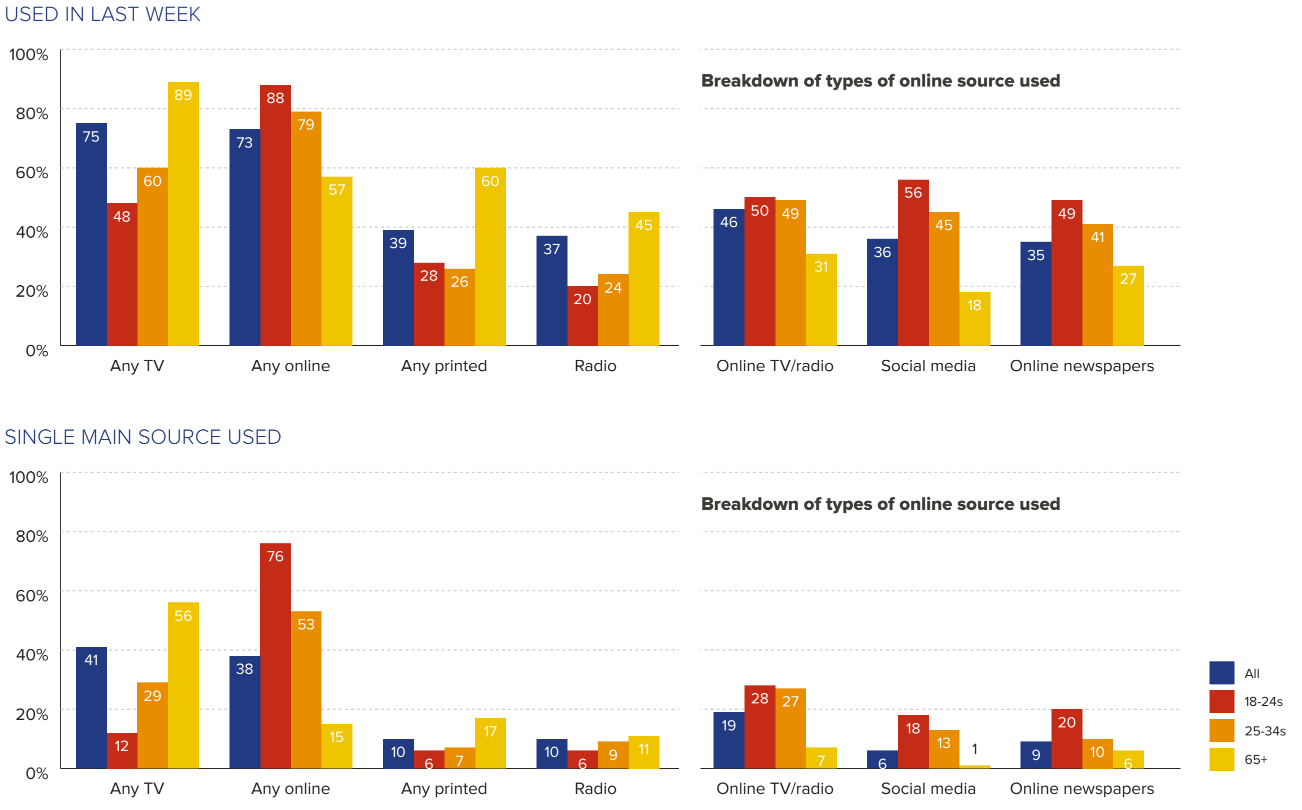
PLATFORMS AND SOURCES USED FOR NEWS

Given these varying motivations, which platforms and sources do different age groups use for news? Is consumption by platform polarised by age, and does this become more or less stark when it is nuanced by particular factors, for example when seeking speed of coverage, or accurate and reliable news?

As the next chart shows, there is considerable variation in terms of the overall platforms used for news by age group, as well as their 'main' source. Young people are far less likely than older people to see TV as their main source of news – just 12% compared to 56% of those aged 65+. Three-quarters of 18–24s say online is their main source, compared to 15% of the 65+ age group.

However, as with 'any' news source, online forms of traditional news media remain popular for 18–24s – 28% nominate online broadcast news sources, and 20% online newspapers, as their main source. Social media are the main source for 18% of this age group, compared to 1% of those aged 65+.

SOURCES OF NEWS BY AGE
FIGURE 2



Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply. *Base: Total sample UK = 2149.* **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 who used a source of news in the last week UK = 2105.*

It is interesting to compare findings relating to the single main source of news across countries, to see the extent to which this UK picture of considerable variation by age group is replicated. It is noteworthy that, as shown in figure 3, young people in the UK are considerably less likely than other countries to nominate TV as their main source. Young online users in Japan are most likely (41%), closely followed by those in France (39%). The use of the press as a main source for news is relatively low in all these countries, although older people in Japan and Germany are comparatively more likely to nominate the press as their main source, along with the UK.

MAIN SOURCE OF NEWS BY COUNTRY
FIGURE 3

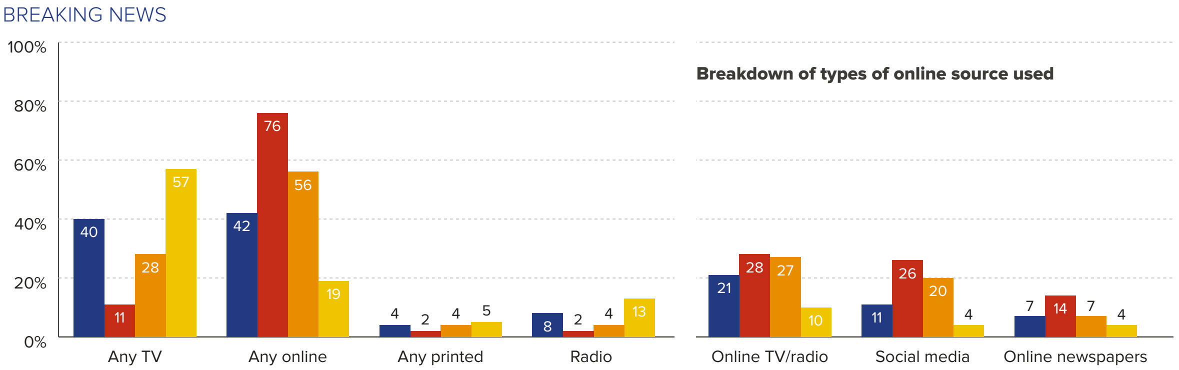
	UK		FRA		GER		SPA		JPN		US	
	18-24	65+	18-24	65+	18-24	65+	18-24	65+	18-24	65+	18-24	65+
Any TV	12%	56%	39%	65%	34%	65%	27%	47%	41%	65%	20%	64%
Any printed newspaper	6%	17%	3%	3%	9%	12%	8%	9%	6%	18%	5%	8%
Any online	76%	15%	55%	20%	44%	8%	61%	29%	51%	12%	63%	19%

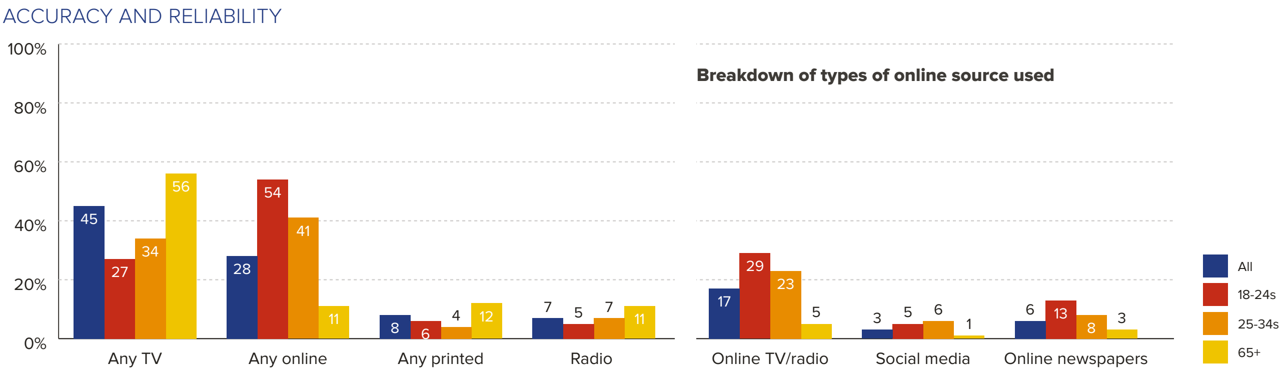
Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news? *Base: All who used a source of news in the last week UK = 2105, US = 2198, France = 1947, Germany = 1943, Spain = 2014, Japan = 1939.*

TV becomes more popular for younger people when they are seeking accuracy and reliability; social media use is mainly for breaking news

We asked respondents which sources they found best for different attributes of news coverage, including speed of coverage and accuracy and reliability (see figure 4).

REASONS FOR FOLLOWING THE NEWS BY AGE
FIGURE 4





Q3ai. For speed of coverage (breaking news), which one of the sources that you've used in the last week do you find best? **Q3aiv.** For accuracy and reliability, which one of the sources that you've used in the last week do you find best? *Base: All who used a source of news in the last week UK = 2105.*

At an overall level, TV and online are broadly equal in terms of being seen as best for breaking news, although this again masks considerable differences by age group. Interestingly, 25–34s are less similar to the responses of 18–24s than we saw previously, suggesting that the habit of using TV as the default place to go for breaking news is either more ingrained in this age group or that their lifestage habits mean that TV is more accessible to them.

Younger people are much more likely to use social media for breaking news when compared with older groups – though they also use mainstream media websites.

For accuracy and reliability, again TV is more popular among those aged 65+, and online is more popular for 18–24s. Online broadcast sources are favoured by 18–24s, with 29% nominating them as their best means of getting accurate and reliable news, 13% online newspapers, and only 5% social media.

Thus, it appears that, for the time being at least, social media are being used selectively by younger people. It seems to be a useful source of breaking news but not to be relied on in terms of its accuracy.

ONLINE NEWS CONSUMPTION HABITS

Tablets are preferred by older people for their news, while smartphones are the strong preference for younger people

The next chart sets out how general use, use for news, and preference for devices for online news shifts across age groups. While tablets are used by similar proportions of each age group, it is the preferred device for news for three times as many older people as younger people. And the smartphone is the preferred device for news for four times as many younger people as those aged 65+. Such clear preferences are likely to be an outcome of the different lifestyle patterns of these two age groups, with the smartphone being particularly useful for access out of the home. Indeed, when asked where they access news, 43% of 18–24s say they do so when out and about or travelling, compared to 20% of those aged 65+.

USE OF ONLINE DEVICES FOR NEWS
FIGURE 5

	Use at all				Use for news				Main use for news			
	All	**18-24**	**25-34**	**65+**	**All**	**18-24**	**25-34**	**65+**	**All**	**18-24**	**25-34**	**65+**
Laptop/PC	81%	77%	71%	90%	59%	66%	55%	56%	48%	46%	35%	60%
Smartphone	67%	84%	82%	44%	42%	69%	64%	16%	27%	42%	47%	9%
Tablet	51%	46%	51%	50%	31%	23%	31%	29%	18%	8%	14%	22%

Q8a. Which, if any, of the following devices do you ever use (for any purpose)? Please select all that apply. **Q8b.** Which, if any, of the following devices have you used to access news in the last week? Please select all that apply. *Base: Total sample UK = 2149.* **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 who used a device for news in the last week UK = 1795.*

The most common route to online news is directly via an app/URL, although around one-third use search engines and three in ten social media

The most common way to access online news is directly via the URL or specific app, as shown in figure 6 (p. 100). Use of social media to come across news is considerably higher for younger age groups than it is for those aged 65+, with almost three times more 18–24s saying they come across news this way than those aged 65+. It appears that social media as a news source remains additive for this age group – they also find news in the other ways listed, at a similar if not greater extent than older age groups.

Turning to the content of what people access online, figure 7 (p. 100) shows the different formats that people can get their news in. As we can see, younger people are using a wider range of types of content – one in five say they follow live pages, compared to one in ten aged 65+, and one quarter look at top 10 lists, compared with 4% of those aged 65+. They are also more likely to read a news blog (16% vs 7%), and much more likely to look at a news graphic (15% vs 2%). That said, these elements appear again to be largely additive to the core means of consumption – which are reading news stories and looking at headlines.

Younger people use a wider range of online news content formats, although these are largely additive to the core reading of news online

GATEWAYS TO ONLINE NEWS
FIGURE 6

	All	18–24	25–34	65+
Directly accessed one or more news websites apps	52%	53%	52%	48%
Search	32%	38%	34%	29%
Used a search engine and typed in a keyword for the name of a particular website	23%	25%	26%	19%
Used a search engine and typed in a keyword about a particular news story	18%	25%	17%	17%
Used social media and came across news that way	28%	45%	37%	16%
Got news via an email newsletter or email alert	10%	10%	7%	16%
Received a news alert through an app on my mobile phone/tablet or via SMS	10%	12%	9%	9%
Used a website or mobile app that pulls together different news links	4%	6%	9%	1%

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? Please select all that apply. *Base: Total sample UK = 2149.*

USE OF TYPES OF ONLINE NEWS CONTENT
FIGURE 7

	All	18–24	25–34	65+
Read news stories or articles	59%	59%	59%	57%
Looked at a list of news headlines (for example on the front page of a news website)	40%	40%	39%	37%
Watched an online news video (live, clip or programme)	21%	23%	21%	17%
Look at a sequence or gallery of pictures about news	17%	22%	18%	16%
Followed a LIVE news page within a website	12%	19%	14%	11%
Looked at a list (e.g. a top 10)	11%	24%	14%	4%
Read a news blog	9%	16%	12%	7%
Listened to news audio online (live, clip or podcast/ programme)	8%	8%	13%	7%
Viewed a news graphic (infographic)	7%	15%	10%	2%

Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select all that apply. *Base: Total sample UK = 2149.*

SUMMARY

This analysis confirms that there are stark differences between younger and older age groups, and underlines the fact that all-user figures mask some very real divergence in responses. The motivations for news consumption cited by different age groups shows that while younger age groups still feel purposive about news consumption, they do so to a lesser extent than those aged over 65.

For the most part, those aged 25–34 show more similarity with 18–24s than with older age groups, but there are areas where this is less likely to be the case – particularly around the choice of using TV as a main or most important source for news, where 25–34s are more likely to nominate TV and less likely to nominate online than 18–24s. This could be due to their changing life circumstances and consequent media habits, or that this group have a residual connection to TV that is less clear to 18–24s. Subsequent waves of this survey will be able to give more indication as to which is the case.

The devices used for news show that young people have a strong affinity with and use of their smartphone for news, while older people are more likely to use their tablet. This has implications for the versioning of content on such devices, and the differing expectations from practitioners about the available time, background context, and likely attention given to online news.

Finally, younger people's use of social media is interwoven with their news consumption. It is used as a key source, and provides 'bump into' content. But young people don't use it for accurate and reliable news. As such, it is still largely additive as a source, with young people continuing to use other sources, and particularly 'traditional' online brands such as broadcast and press titles.

ATTITUDES TO SPONSORED AND BRANDED CONTENT (NATIVE ADVERTISING)

Shaun Austin, *Director, Media Research, YouGov,* and
Nic Newman, *Research Associate, Reuters Institute*

Traditional display advertising on the web is in trouble. Fewer people are clicking on banners, yields for publishers are static or falling, and many users shut off ads completely. YouGov's research for this report shows that in both the US and UK between a third and a half of online news users use software that blocks the most popular forms of display advertising.

Against this background it is not surprising that content providers, brands, and platforms are looking for new and better ways to reach and engage audiences.

Budgets are switching to so-called 'native' advertising where brand messages look more like regular content – sitting in the same templates and using the same formats that might be used for a standard piece of journalism or a user-generated post on social media.

This essay looks at what people think about these new and sometimes controversial forms of advertising. Using survey evidence and focus group interviews in the UK and US we explore consumer attitudes towards this form of sponsored content and the issues of labelling and trust that surround it.

NATIVE ADVERTISING EXPLAINED

Sponsored or branded content is not a totally new phenomenon. Newspapers have been producing advertorials and special supplements paid for by advertisers for decades – but somehow the separation seems clearer in a physical product.

In social media, sponsored posts now sit cheek by jowl with regular updates and content posts. Formats and functionality are identical, labelling is understated and brands are learning fast how to adapt their messaging to be part of a conversation not a broadcast. Facebook and Twitter are building billion dollar businesses on enabling this approach.

New media platforms like Buzzfeed and Vice have also turned their back on display and already make the majority of their money from native advertising formats. They have set up digital commercial teams to develop 'viral moments' for brands – articles, lists, infographics, videos, or full-blown web documentaries. In the example here a Buzzfeed list is repurposed to make a fun item for young people around different ways to use tequila in cooking. The item was paid for by *Sauza*® tequila.

Venture capitalists are investing millions of dollars in companies like Buzzfeed because they have learned to use technology to develop and perfect formats like listicles and quizzes that resonate with internet users of a particular demographic. Effectively, they have built world-class systems for content creation, analytics, and advertising.

Over the past year, traditional publishers have been trying to learn from this approach and have set up their own digital studios to do something similar.

The *New York Times* (T Brand Studio), the *Guardian* (Guardian Labs[25]), and the Wall Street Journal have invested heavily – in a tacit endorsement of the emerging practice.

In one of the most successful examples to date, the *New York Times* published a 1500 word native ad[26] for the Netflix series *Orange is the New Black*, using video, charts, and audio to supplement text about female incarceration in the US. It was one of the first pieces of sponsored content generated by a new T Brand Studio, a nine-person team dedicated to the task.

The *Guardian* is also creating 'paid post' formats as well as pursuing more traditional approaches where journalists create content independently – but still paid for by an advertiser. Unilever paid over £1m for a range of content to be produced on the subject of sustainable living. The section and the articles were clearly marked 'Sponsored by Unilever', but in other respects the content melded into the overall *Guardian* experience.

Definitions and approaches to sponsored and branded content are varied and still emerging. There is no standard approach to labelling and a number of publishers have been caught out, such as when *The Atlantic* admitted to misjudgements over a Church of Scientology sponsored post.[27]

While the IAB has announced some plans in the UK to start rolling out regulations for native advertising and sponsored content, it is still early days and consumers think more work is needed.

CONSUMER ATTITUDES

As part of the *Digital News Report 2015*, we included questions relating to native advertising in the survey for both USA and UK. We followed this up with online focus groups in the same markets to explore attitudes in further detail. In the UK, all respondents were members of our YouGov Pulse panel, our passive web tracking tool. We used web browsing data to select respondents who had engaged with native advertising content, and compared stated attitudes and perceptions alongside actual behaviours of consuming native content.

Many consumers are losing patience with traditional forms of online advertising and there seems to be a close relationship between the amount of interruption caused and the vitriol consumers feel towards it. Around three in ten respondents in both the USA (29%) and UK (31%) say they find traditional banner advertising distracting and will actively avoid sites where they interfere with the content too much. Static banner advertising is more tolerable for readers than video advertising, with pop-up advertising being seen as the worst offender of all.

There is also a perception that video advertising impacts on the speed of browsing, which is also particularly frustrating for readers.

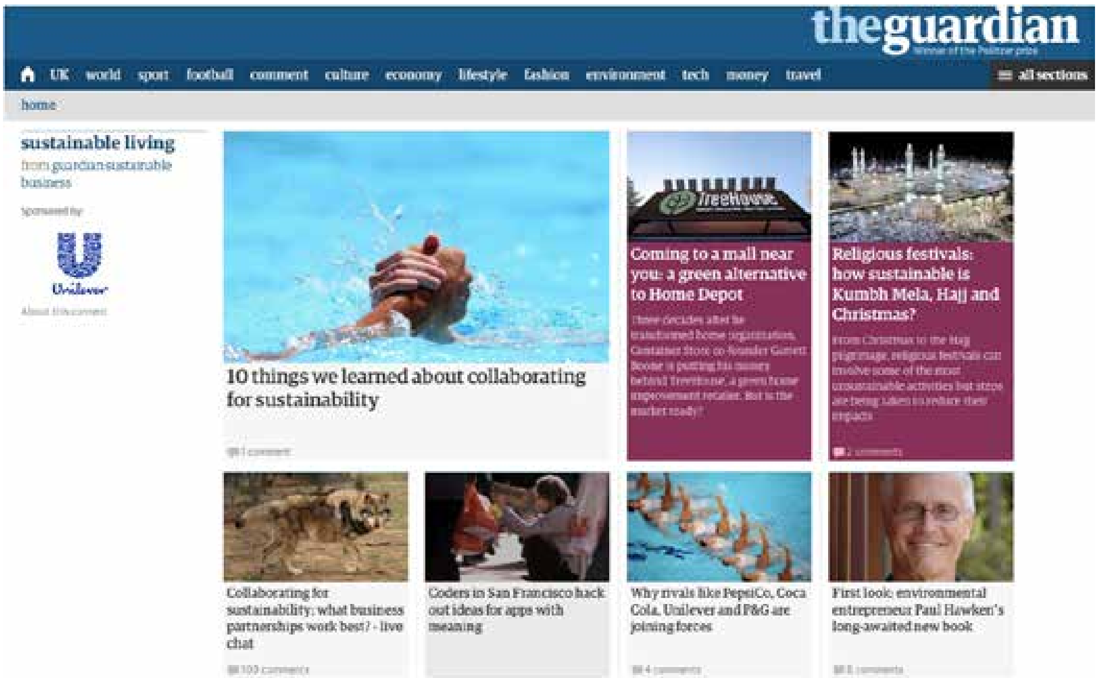
Self-playing videos are the devils [sic] creation. You're browsing the news late at night and suddenly an ad for laxatives is blasting out from your laptop at full volume! (Tanya, 51, UK)

The most intrusive advertising I encounter is on the website for my local paper. Huge pop up videos before you can access content. If they weren't auto playing they wouldn't be so annoying. (Alan, 31, UK)

Pop ups irritate me the most. I don't like video adverts, but I can live with them because I never willingly listen to them. Banner advertising doesn't really bother me because I just ignore it. (Helena, 36, UK)

Pop ups are most annoying, particularly if you are browsing on a phone as sometimes they can be really hard to close down. (Eleanor, 32, UK)

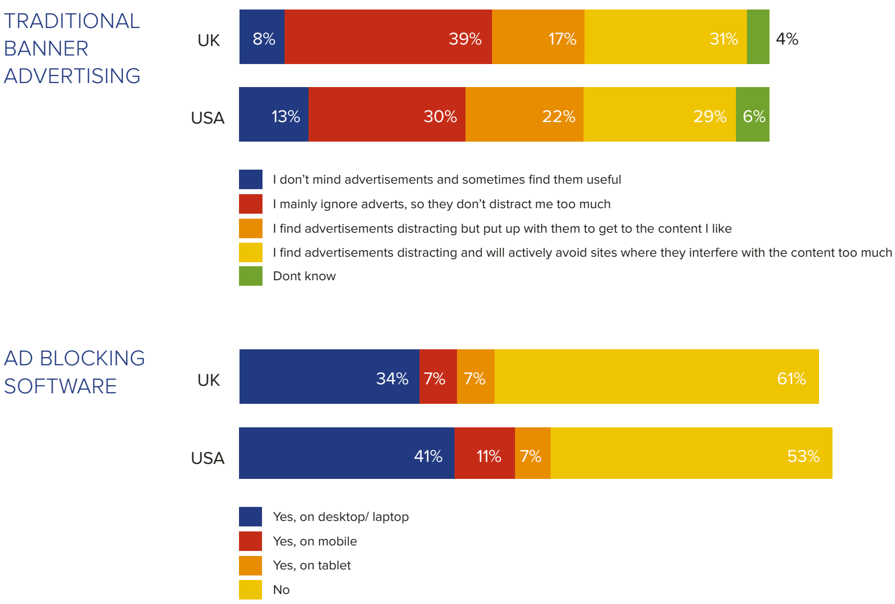
25 Guardianlabs.theGuardian.com.
26 paidpost.nytimes.com/netflix/women-inmates-separate-but-not-equal.html?smid=tw-share&_r=0#.VKvhTNz-1uY.
27 www.forbes.com/sites/jeffbercovici/2013/01/15/the-atlantic-on-that-scientology-advertorial-we-screwed-up.



Consumers' annoyance with advertising and the interruption it causes to their reading experience has led large numbers of them to install ad-blocking software to minimise its impact. In the UK, 39% have installed ad-blocking software on their PC, mobile, or tablet, whereas in the US this rises to 47%. The figures are even higher for 18–24s (56% and 55% respectively).

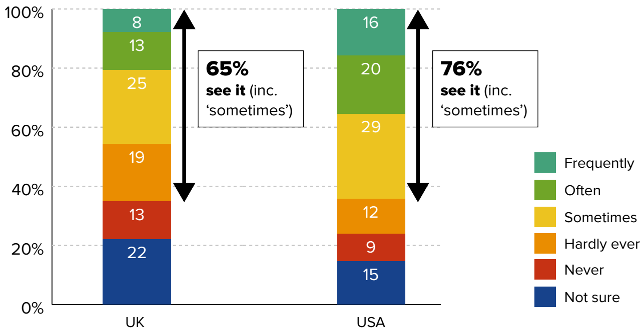
Many consumers agree that advertising is a necessary part of continuing to get free news. However, the increasing use of ad-blocking software means that advertisers need to find new ways of reaching their audiences, and native content has the potential to reach audiences, particularly younger consumers.

ATTITUDES TO ADVERTISING



QSpons1. Which of the following statements best sums up your view of traditional banner advertising on news websites? **QSpons2.** Do you regularly use Ad Blocking software (software you have installed on your device specifically to remove advertisements from news or other websites)? *Base: Total sample UK = 2149, US = 2295.*

AWARENESS OF SPONSORED CONTENT



QSpons3. How often do you see this kind of sponsored content in online news sites these days? *Base: Total sample UK = 2149, US = 2295.*

AWARENESS

After respondents in the quantitative survey were shown a number of native advertising articles, a relatively high proportion reported having come across this type of content before. In the US, over one in three (35%) said they frequently or often see sponsored content, compared to around a fifth (21%) in the UK.

There is however much confusion in the language around sponsored content and native advertising. For example, one member of our focus group in the US confidently and spontaneously talked about seeing more native advertising. However, once we delved further into it, we found they were actually describing retargeted advertising, based on their browsing history.

BEING MISLED?

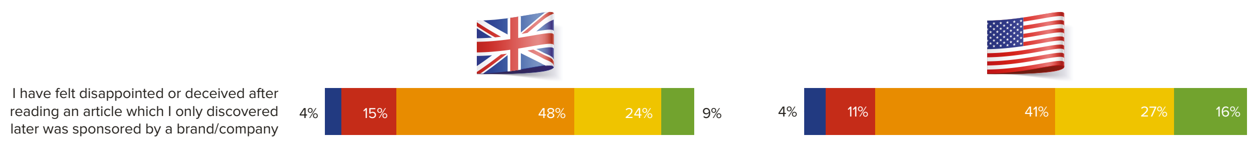
There is a perception that readers are disappointed or feel deceived if they later find out content was sponsored by a brand or company. In the UK, a third (33%) have felt disappointed or deceived, a level that rises to more than four in ten (43%) in the US. The higher figure in the US could be down to the fact that native advertising is more prevalent there.

There are stark differences by age, with younger respondents considerably less likely to feel they are being 'deceived' by native content. This is likely to be down to a number of factors. First, they have grown up in a commercial world, with brands firmly ingrained in their lives. Secondly, they are more likely to visit sites such as Buzzfeed which are considered to be more about 'fun news' and therefore a more natural environment for sponsored content. Native advertising is more established and more prevalent on these sorts of sites.

We also found a great deal of inconsistency in the labelling of sponsored content across different news sites, to the extent that frequently readers aren't aware of what they are looking at before they start reading an article. 'Paid for', 'Sponsored by', 'Promoted' are words used to signpost native advertising content, with some meaning one thing on some sites and another on a different site.

The *Guardian* website has a page that outlines clearly the definitions of each of the terms it uses; however this is a bit like the 'terms and conditions' pages which are rarely read. In order to reduce levels of perceived deception, the industry needs to adopt consistent and clear signposting across different sites if all consumers are to have faith in what they are reading.

FEELING DISAPPOINTED OR DECEIVED



QSpons5. In general terms, to what extent do you agree or disagree with the following statements? (Please select one option on each row.) *Base: Total sample UK = 2149, US = 2295.*

THE TYPE OF CONTENT INFLUENCES PERCEPTIONS

Consumers expect different things from different types of sites and native advertising needs to be aware of these boundaries. Readers of online news sites care deeply about trust, truth, and accuracy, which is why strong emotions are roused when they feel they are being 'deceived' by advertising masquerading as content. Respected news brands are generally trusted by the public, although, as figures from the *Digital News Report* 2015 show, levels of trust vary significantly between the UK and the US.

With this trust comes a responsibility to ensure that readers are not misled. Many in our focus groups felt that there are some content areas – such as home and world news, politics, and financial news – that should be considered sacred and free from native advertising. These hard lines in the eyes of the consumer are well-illustrated by these responses:

News, politics, finance, for sure [are a no-no for native advertising]. Those are the topics you don't want people messing with for profit. (Helena, 36, UK, spent around 1.30 minutes reading Netflix/*New York Times* native advertising)

The news press are there also to hold politicians, business and other interest groups to account. If any of them are seen to be influenced by them then they will suffer i.e. HSBC. (Alan, 31, UK, has visited the Guardian Cities site three times over the last year, and spent around 9 minutes on the site)

If the news brand wants to be seen as independent and trusted then news, politics, business should not be influenced by commerce. (Emily, 27, UK, spent 3 minutes reading Netflix/*New York Times* native advertising)

I don't want to see coverage of human rights in Papua brought to me by the companies who make soap out of palm oil. (Tanya, 51, UK)

Respondents tell us that, should the brands start introducing native advertising to the more serious news content areas, it would have a damaging impact on their perceptions of the news organisation.

On the other hand, less 'serious' areas of news, such as entertainment, lifestyle, fashion, travel, and motoring, are deemed to be more suitable environments for native advertising. This could be due to the fact that brands are already an important part of the landscape in these areas and therefore respondents are more open to hearing from them on these subjects. They also feel that their decisions in these areas may have little long-term impact.

Lying or deceiving me about these topics will have no lasting effects on my life. (Jenn F, 32, US)

I think the rule of thumb should be – if the industry is already reliant on advertising (movies, lifestyle, sports, etc.) then it's OK. But not news and politics. That's not commercial – or it shouldn't be. (Helena, 36, UK)

I wouldn't care who wrote it if it was informative and interesting. I would only be annoyed if I read a story and realised it was advertising half way through. (Eleanor, 32, UK, spent time reading *Daily Mail*/Now TV's 'The Warrior Plan: 8 ways to get a body like a Game of Thrones hotty')

DOES IT HURT NEWS BRANDS OR ADVERTISERS?

In general, the majority of news audiences say that sponsored content has neither a positive nor negative impact on either the brand in question or the news organisation that carries the content. Around a fifth (22% in US and 21% in UK) say that they have a less positive view of the brand paying for an advert. However, the impact on the news organisation that carries the ad is more negative, with 28% of UK and US respondents having a less positive view of the news brand.

Younger consumers are more open to native advertising on news brands. Almost a fifth (19%) of 18–24 year olds and 15% of 25–34 year olds in the US say they feel more positive towards the brand. In the UK, 13% of 18–24 year olds say they feel more positive towards the brand, a figure that falls to 11% amongst 25–34 year olds. The proportion saying they feel more positive towards the news organisation is slightly lower, but again younger respondents are more positive than older ones.

When talking to respondents in more detail about specific examples, there were significant differences between the UK and the USA. In the US, the reaction to a Buzzfeed article sponsored by Sauza tequila ('12 Holiday Treats to Spike with Tequila') was very positive. The respondents thought that the article contained some interesting tips and they weren't put off at all by a brand sponsoring it. However, in the UK we showed an article sponsored by Renault and the content was perceived to be not really engaging enough to positively

IMPACT ON BRAND AND NEWS ORGANISATION

	Brand in Ad	News org	Brand in Ad	News org
More positive	10%	11%	8%	7%
Neither nor	68%	62%	72%	66%
Less positive	22%	28%	21%	28%

QSpons4. How does advertising like this impact on your perceptions of the news organisation and the brand being talked about in the advert? *Base: All who saw this kind of sponsored content in online news sites UK=1374, US=1761.*

impact respondents' perceptions of the brand. Furthermore, Buzzfeed wasn't perceived to be a serious news site by these respondents.

However, it was a different story when we showed respondents a *New York Times* article sponsored by Netflix ('Women Inmates: Why the Male Model Doesn't Work'). The reaction from the UK audience was significantly more positive than both their response to the Buzzfeed case study and also the feedback from consumers in the US.

I think this is a very slick looking article. Relevant to the product being advertised but seems to be informative and in-depth. (Alan, 31, spent around a minute reading the Guardian Witness page, powered by EE)

The problem is if I see this in the NYT, I assume an editor vetted the article and read it and edited it. Who vouches for the author? (Kathleen, 60, US)

Among UK consumers, the *New York Times* content was perceived to be informative and interesting, while the sponsorship was perceived to be relevant and a good fit. In the US the response was a little more mixed. Some found the content interesting, whilst others felt perturbed that it was advertising dressed up as news – the Buzzfeed example to them wasn't pretending to be news. In the US, some respondents were surprised to see such content on the *New York Times* site as to them it is a respected and trusted brand.

One notable example that failed to engage with UK consumers was a content partnership between Unilever and the *Guardian*. Readers immediately picked up that it had a different tone to the content they would normally expect to see in the *Guardian* and described the content as bland. This example highlights the need for content to reflect a site's editorial style and tone in order for readers to find the content engaging and credible.

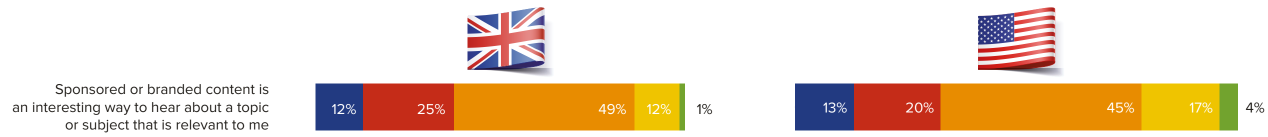
It feels a little measured, un-noteworthy. It doesn't feel especially like the Guardian so I suspect someone from Unilever's ad agency [produced the content]. (Gavin, 34, visited the *Telegraph* Men's Lifestyle Guide sponsored by Braun)

This flags up an interesting paradox. Readers appear to be more engaged with content that replicates the style and tone of the news brand, but as a result, are more likely to feel misled and deceived by the news brand. While news brands have much to gain from this new form of online advertising, the danger of further blurring of the line between advertising and editorial could harm the credibility of news brands, with little lasting impact on advertisers. Consumer attitudes show that, when it comes to native advertising, the stakes are far higher for news brands than for advertisers.

IS THE CONTENT ITSELF INTERESTING?

Relatively few people say that sponsored content is an interesting way to hear about topics and subjects that are relevant to them. In the UK just 14% like getting information in this way, a figure that increases to over one in five (22%) in the US. It is younger consumers who are more likely to find native advertising content more interesting, although, as mentioned earlier, older respondents are less likely to visit the sites where sponsored content is more prevalent, such as Buzzfeed.

VALUE OF SPONSORED CONTENT



QSpons5. In general terms, to what extent do you agree or disagree with the following statements? (Please select one option on each row.) *Base: Total sample UK = 2149, US = 2295.*

CONCLUSIONS

Traditional forms of online advertising are struggling to have an impact. The more it interrupts the reading experience, the more negative consumers' views are towards it. Therefore brands need to find new ways to communicate with audiences, and sponsored content has the potential to do this; however, the type of content needs to be a natural fit to both the site and readers' perceptions of the site.

Broadly speaking, there are two types of sponsored content that we found to be of interest to respondents. The first is something practical and/or useful, but potentially more fun (such as the type of content found on Buzzfeed). The second is something that is more serious in nature, is informative, and where there is a clear link between the content and the brand (for example, the types of thing you might find in an online version of a broadsheet newspaper).

However, for broadsheets, native advertising is more of a minefield than it is for entertainment sites. Current affairs, business, finance, and politics sections are generally considered to be sacred by consumers and readers feel that these areas should be free of commercial influence and retain an independent view. Consumers are open to reading sponsored content in areas such as entertainment, travel, fashion, and lifestyle as these are considered to be more appropriate environments for sponsored content.

It is clear that consumers want to see clear labelling and signposting of paid-for content. Readers do not like to feel they are being deceived; however, if they know up-front that a brand may have influenced the content, consumers are more accepting. To help maintain levels of trust, the language used should be standardised across news sites as much as possible.

Sponsored content has great potential for brands to reach audiences, particularly younger consumers. But whoever brands are trying to reach, the content has to be of value to the audience to have an impact. The content also needs to be a natural fit for the publication – anything that jars with a consumer’s perception of what should be on a site may be dismissed by readers. If these principles can be followed, then sponsored content has a chance of being embraced by online audiences, allowing brands to overcome some of the issues that readers currently have with online advertising.

Juliet Tate contributed additional research to this essay.

POSTSCRIPT AND FURTHER READING

The authors welcome feedback on this report and suggestions on how to improve our work via reuters.institute@politics.ox.ac.uk as well as potential partnerships and support for our ongoing work. In the meantime here is a list of further reading.

RELEVANT SURVEYS AND REPORTS

BBC *Future of News Report* (Jan. 2015)
newsimg.bbc.co.uk/1/shared/bsp/hi/pdfs/29_01_15future_of_news.pdf.

Emily Bell, Reuters Institute lecture, 'Silicon Valley and Journalism: Make up or Break up?'
reutersinstitute.politics.ox.ac.uk/news/silicon-valley-and-journalism-make-or-break.

Ipsos Mori Global Trends report
www.ipsosglobaltrends.com/files/gts_2014_web.pdf.

New York Times Innovation report (Mar. 2014)
www.scribd.com/doc/224608514/The-Full-New-York-Times-Innovation-Report#scribd.

Ofcom, *The Communications Market Report* (Aug. 2014)
stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr14.

Ofcom, *Measuring Online News Consumption and Supply* (July 2014)
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Ofcom, *News Consumption in the UK 2014* (June 2014)
stakeholders.ofcom.org.uk/market-data-research/other/tv-research/news-2014.

Pew Research Center's Project for Excellence in Journalism, *The State of the News Media* (2015)
stateofthemedia.org.

OTHER RELEVANT PUBLICATIONS

All available: http://reutersinstitute.politics.ox.ac.uk/publications/risj.html

Lucy Küng, *Innovators in Digital News* (Forthcoming I.B.Tauris, 2015).

David A. L. Levy and Rasmus Kleis Nielsen (eds), *The Changing Business of Journalism and its Implications for Democracy* (RISJ, 2010).

John Lloyd and Laura Toogood, *Journalism and PR: News Media and Public Relations in the Digital Age* (I.B.Tauris, 2014).

Rasmus Kleis Nielsen, *Ten Years that Shook the Media World: Questions and Trends in International Media* (RISJ, 2012).

Kellie Riordan, *Accuracy, Independence, and Impartiality: How Legacy Media and Digital Natives Approach Standards in the Digital Age*, Journalist Fellow paper (RISJ, 2014).

Richard Sambrook, *Delivering Trust: Impartiality and Objectivity in the Digital Age* (RISJ, 2012).

Richard Sambrook, Simon Terrington, and David A. L. Levy, *The Public Appetite for Foreign News on TV and Online* (RISJ, 2013).

Martha Stone, *Big Data for Media* (RISJ, 2014).

UNIVERSITY OF OXFORD

REUTERS INSTITUTE for the STUDY of JOURNALISM

Reuters Institute for the Study of Journalism
Department of Politics and International Relations
University of Oxford
13 Norham Gardens
Oxford
OX2 6PS
United Kingdom

Telephone: +44 (0)1865 611080
e: reuters.institute@politics.ox.ac.uk
w: reutersinstitute.politics.ox.ac.uk
w: www.digitalnewsreport.org

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