

Reuters Institute Digital News Report 2017



Reuters Institute Digital News Report 2017

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

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Foreword

Dr David A. L. Levy

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

This is our sixth annual report that explores the changing environment around news across countries. The report is based on a survey of more than 70,000 people in 36 markets, along with additional qualitative research, which together make it the most comprehensive ongoing comparative study of news consumption in the world. A key focus remains in Europe where we have added Slovakia, Croatia, and Romania for the first time – but we have also added four markets in Asia (Taiwan, Hong Kong, Malaysia, and Singapore) along with three additional Latin American countries (Argentina, Chile, and Mexico).

This year's report comes against the backdrop of continuing concerns about how to fund journalism and the relations between news organisations and platforms, but also an intensification in news about the news, driven by attacks on the US media and widespread concern about 'fake news'. We look at issues of truth and falsehood and trust in this year's report, where we continue to see big differences between countries and regions.

We have data on many of these problems, but in particular we have focused on two areas: (1) the extent to which people are prepared to pay for news or the different ways journalism might be funded in the future, and (2) understanding more about some of the drivers of low, and in some cases declining, trust in the media. For the first time we've attempted to measure and visualise relative levels of media polarisation across countries and identify a link between media polarisation and trust. Another focus has been on the media's relationship with platforms – in particular how news is discovered and consumed within distributed environments such as social media, search, and online aggregators. We have undertaken a tracking study in the UK to understand how content flows between these platforms and news brands – and to try to quantify the level of brand attribution that results.

On the business issues, we have conducted a series of focus groups this year in four countries (United States, the United Kingdom, Finland, and Spain) where we talked to both those who pay for news and those who do not, as well as exploring consumer attitudes to emerging funding models such as micropayment, donations, native advertising, sponsored content, and e-commerce. We reference this additional research throughout the report, but in order to do it justice we'll be publishing much fuller accounts in the coming months.

For an industry perspective we're delighted to include a viewpoint on journalism's current dilemmas from Melissa Bell, co-founder of Vox Media. Vox has been at the sharp end of explaining the dramatic political events around the rise of Donald Trump. It is also actively exploring new business models.

In terms of partnerships we continue to deepen our relationships across the world with a multiplicity of distinguished academic institutions. These have helped in a variety of different ways, from preparing country profiles to in-depth analysis of the results. Many of our partners are also organising events or country reports looking in more detail at national themes – adding wider value to this international project. In the final quarter of 2017 we will be producing an Asia Pacific Regional Report with our partners at the Chinese University of Hong Kong.

We continue to make efforts to open up the data as much as possible via our website (www.digitalnewsreport.org). This contains slidepacks and charts, along with a licence that encourages reuse, subject to attribution to the Reuters Institute. All of the website charts have a feature which allows them to be used by – or be embedded in – any other website or blog. The website also includes an interactive charting feature, which allows anyone to explore and visualise the data by themselves by country and over time. Raw data tables are also available on request along with documentation for reuse.

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

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

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

Methodology

This study has been commissioned by the Reuters Institute for the Study of Journalism to understand how news is being consumed in a range of countries. Research was conducted by YouGov using an online questionnaire at the end of January/beginning of February 2017.

- 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 was lower than 1% in Finland, averaged around 3% but was as high as 9% in Australia.
- A comprehensive online questionnaire¹ was designed to capture all aspects of news consumption.
- A number of face-to-face focus groups were held in the US, UK, Finland, and Spain to explore issues relating to paying for news and digital advertising. These were conducted by Kantar Media.

Our survey was conducted using established online panels run by our polling company YouGov and their partners. Because this is an online survey 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 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	Country code	Final sample size	Total population	Internet penetration
 USA	USA	2,269	324m	90%
 UK	UK	2,112	65m	92%
 Germany	GER	2,062	81m	89%
 France	FRA	2,000	65m	86%
 Italy	ITA	2,011	62m	63%*
 Spain	SPA	2,006	46m	77%
 Portugal	POR	2,007	10m	68%
 Ireland	IRE	2,002	4.9m	94%
 Norway	NOR	2,056	5.1m	96%
 Sweden	SWE	2,021	9.7m	95%
 Finland	FIN	2,007	5.5m	92%
 Denmark	DEN	2,011	5.7m	96%
 Belgium	BEL	2,009	11m	88%
 Netherlands	NLD	2,006	17m	96%
 Switzerland	SUI	2,005	8.2m	87%
 Austria	AUT	2,000	8.6m	83%
 Hungary	HUN	2,004	9.8m	81%
 Slovakia	SVK	2,002	5.4m	83%
 Czech Republic	CZE	2,003	11m	88%
 Poland	POL	2,013	38m	68%
 Romania	ROU	2,029	20m	56%
 Croatia	CRO	2,005	4.2m	74%
 Greece	GRE	2,002	11m	65%
 Turkey	TUR	2,005	78m	60%
 Japan	JPN	2,000	126m	94%
 South Korea	KOR	2,002	51m	89%
 Taiwan	TWN	1,017	23m	88%
 Hong Kong	HK	2,015	7.4m	82%
 Malaysia	MYS	2,108	31m	70%
 Singapore	SGP	2,000	5.7m	81%
 Australia	AUS	2,004	23m	92%
 Canada	CAN	2,000	35m	93%
 Brazil	BRA	2,003	206m	68%
 Argentina	ARG	2,001	44m	79%
 Chile	CHL	2,005	18m	80%
 Mexico	MEX	2,003	123m	56%

Please note that in Brazil, Mexico and Turkey our samples are representative of urban rather than national populations, which must be taken into consideration when interpreting results. Source: Internet World Stats <http://www.internetworldstats.com> internet population estimate 2017. *Italy data from Internet World Stats 2016.

¹ The full questionnaire can be accessed at www.digitalnewsreport.org

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 is the author of *Europe's Digital Revolution: Broadcasting Regulation, the EU and the Nation State* (Routledge, 1999/2001), and joint author or editor of several RISJ publications.



Nic Newman is a journalist and digital strategist who played a key role in shaping the BBC's internet services over more than a decade. Nic is currently a Research Associate at the Reuters Institute and is also a consultant on digital media, working actively with news companies on product, audience, and business strategies for digital transition.



Dr Richard Fletcher is a Research Fellow at the Reuters Institute for the Study of Journalism. He is primarily interested in global trends in digital news consumption, the use of social media by journalists and news organisations, and more broadly, the relationship between computer-based technologies and journalism.



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

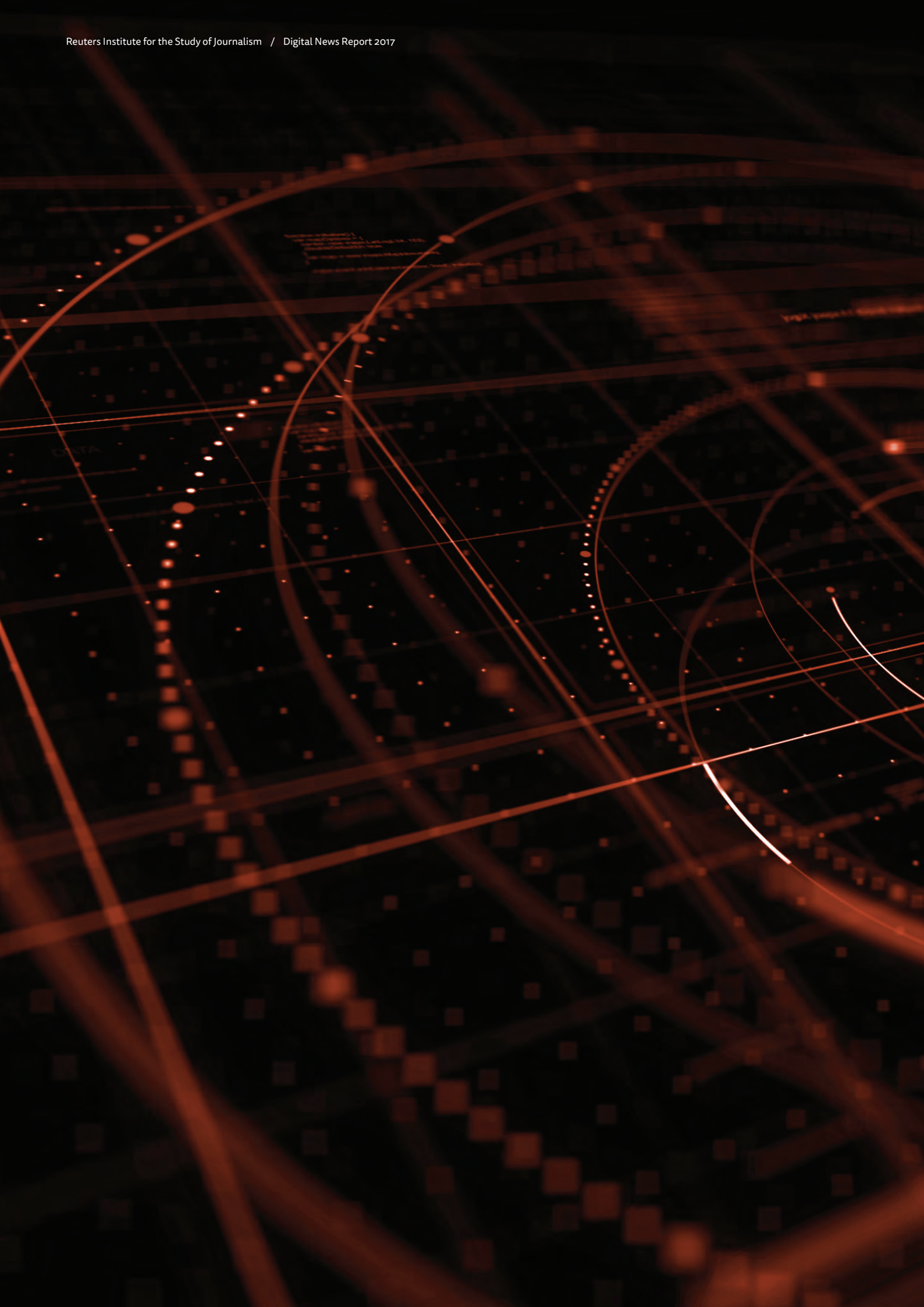


Dr Rasmus Kleis Nielsen is Director of Research at the Reuters Institute for the Study of Journalism and Editor in Chief of the *International Journal of Press/Politics*. His work focuses on changes in the news media, political communication, and the role of digital technologies in both.

Country-level commentary and additional insight around media developments have been provided by academic partners and by our network of Reuters Journalist Fellows around the world.² Authorship is referenced at the bottom of the respective country page in Section 4.

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

² Reuters Institute Fellowships offer an opportunity to mid-career journalists to spend time researching an aspect of journalism for one or more terms at the Institute in Oxford.



Section 1

Executive Summary and Key Findings

Nic Newman
Research Associate, Reuters Institute

This year's report comes amid intense soul-searching in the news industry about fake news, failing business models, and the power of platforms. And yet our research casts new and surprising light on some of the prevailing narratives around these issues.

- The internet and social media may have exacerbated low trust and 'fake news', but we find that in many countries the underlying drivers of mistrust are as much to do with deep-rooted political polarisation and perceived mainstream media bias.
- Echo chambers and filter bubbles are undoubtedly real for some, but we also find that – on average – users of social media, aggregators, and search engines experience more diversity than non-users.
- Though the economic outlook for most media companies remains extremely difficult, not all the indicators are getting worse. The growth of ad-blocking has stopped while online subscriptions and donations are picking up in some countries. Our focus groups provide some encouragement that more might be prepared to pay in the future if content is sufficiently valuable, convenient, and relevant.
- Mobile marches on, outstripping computer access for news in an increasing number of countries. Mobile news notifications have grown significantly in the last year, especially in the US (+8 percentage points), South Korea (+7), and Australia (+4), becoming an important new route to content and giving a new lease of life to news apps.
- In a related development there has been a significant growth in mobile news aggregators, notably Apple News, but also Snapchat Discover for younger audiences. Both have doubled usage with their target groups in the last year.
- Smartphones are now as important for news inside the home as outside. More smartphone users now access news in bed (46%) than use the device when commuting to work.
- Voice-activated digital assistants like the Amazon Echo are emerging as a new platform for news, already outstripping smart watches in the US and UK.

With data covering more than 30 countries and five continents, this research is a reminder that the digital revolution is full of contradictions and exceptions. Countries started in different places, and are not moving at the same pace. These differences are captured in individual country pages that can be found towards the end of this report. They contain critical industry context written by experts as well as key charts and data points. The overall story around the key trends is captured in this executive summary with additional analysis on some subject areas in a separate section.

SOME OF THE KEY FINDINGS FROM OUR 2017 RESEARCH:

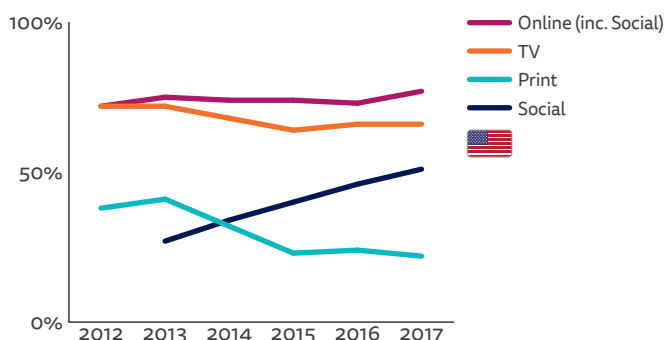
- Growth in social media for news is flattening out in some markets, as messaging apps that are (a) more private and (b) tend not to filter content algorithmically are becoming more popular. The use of WhatsApp for news is starting to rival Facebook in a number of markets including Malaysia (51%), Brazil (46%), and Spain (32%).
- Only a quarter (24%) of our respondents think social media do a good job in separating fact from fiction, compared to 40% for the news media. Our qualitative data suggest that users feel the combination of a lack of rules and viral algorithms are encouraging low quality and 'fake news' to spread quickly.
- There are wide variations in trust across our 36 countries. The proportion that says they trust the news is highest in Finland (62%), but lowest in Greece and South Korea (23%).
- In most countries, we find a strong connection between distrust in the media and perceived political bias. This is particularly true in countries with high levels of political polarisation like the United States, Italy, and Hungary.
- Almost a third of our sample (29%) say they often or sometimes avoid the news. For many, this is because it can have a negative effect on mood. For others, it is because they can't rely on news to be true.
- In terms of online news subscriptions, we have seen a very substantial 'Trump bump' in the US (from 9 to 16%) along with a tripling of news donations. Most of those new payments have come from the young – a powerful corrective to the idea that young people are not prepared to pay for online media, let alone news.
- Across all countries, only around one in ten (13%) pay for online news but some regions (Nordics) are doing much better than others (Southern Europe and much of Asia).
- Ad-blocking growth has stalled on desktop (21%) and remains low on smartphones (7%). Over half say they have temporarily disabled their ad-blocker for news in countries like Poland (57%), Denmark (57%), and the United States (52%).
- We have new evidence that news brands may be struggling to cut through on distributed platforms. In an experiment tracking more than 2,000 respondents in the UK, we found that while most could remember the path through which they found a news story (Facebook, Google, etc.), less than half could recall the name of the news brand itself when coming from search (37%) and social (47%).
- Austrians and Swiss are most wedded to printed newspapers, Germans and Italians love TV bulletins, while Latin Americans get more news via social media and chat apps than other parts of the world.

OUR CHANGING MEDIA MIX

We now have six years' data looking at the sources people use for news.³ In most countries we see a consistent pattern, with television news and online news the most frequently accessed, while readership of printed newspapers has declined significantly.

The biggest change has been the growth of news accessed via social media sites like Facebook and Twitter. In the United States, social media became a key player in the story of the election not least because of its well-documented role in spreading made-up news stories, such as that Pope Francis endorsed Donald Trump or that Hillary Clinton sold weapons to ISIS. Over half (51%) of our US sample now get news via social media – up five percentage points on last year and twice as many as accessed in 2013.

SOURCES OF NEWS 2012-17 USA



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 2012-2017: USA=845/2028/2197/2295/2197/2269. Note: 2014 data has been estimated because of an issue with randomisation of news sources in the questionnaire.

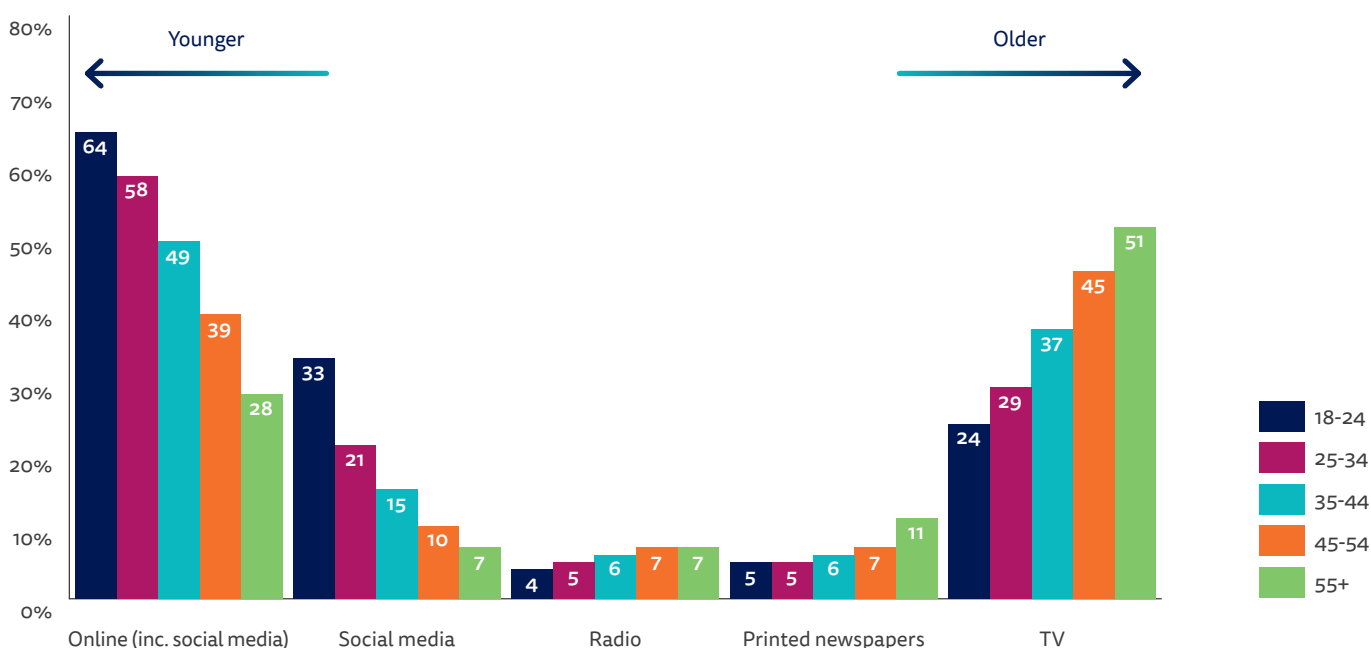
It would be misleading to overplay the role of social media in Donald Trump's victory. In general, a far bigger proportion of Americans still get their news from television and online sources, which also benefited from strong interest in the election race. Even those relying more on social media would have found much of the news in their feed came from traditional media outlets.

The reality is that, for most of us, social media are not something different but increasingly just part of the everyday media mix. Two-thirds of social media news users in the United States also watch television news (67%) and two-thirds also visit mainstream websites or apps (66%) – a bit more than the the general population. Just 2% ONLY use social media for news in an average week. This evidence acts as counter to the often-cited theories that we live in our echo chambers much of the time. Most people combine a number of different sources and platforms for news.

For further analysis see section 3.4: Social Media and Incidental Exposure, p.43.

We should also remember that there are significant generational splits in the sources used for news. Across all countries, younger groups are much more likely to use social media and digital media as their main source of news, while older groups cling to the habits they grew up with (TV, radio, and print). A third of 18-24s (33%) now say social media are their main source of news – that's more than online news sites (31%) and more than TV news and printed newspapers put together (29%).

MAIN SOURCE OF NEWS BY AGE – ALL MARKETS



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: Aged 18-24/25-34/35-44/45-54/55+ that used a source of news in the last week: All markets = 7754/12,332/12,976/12,630/24,620.

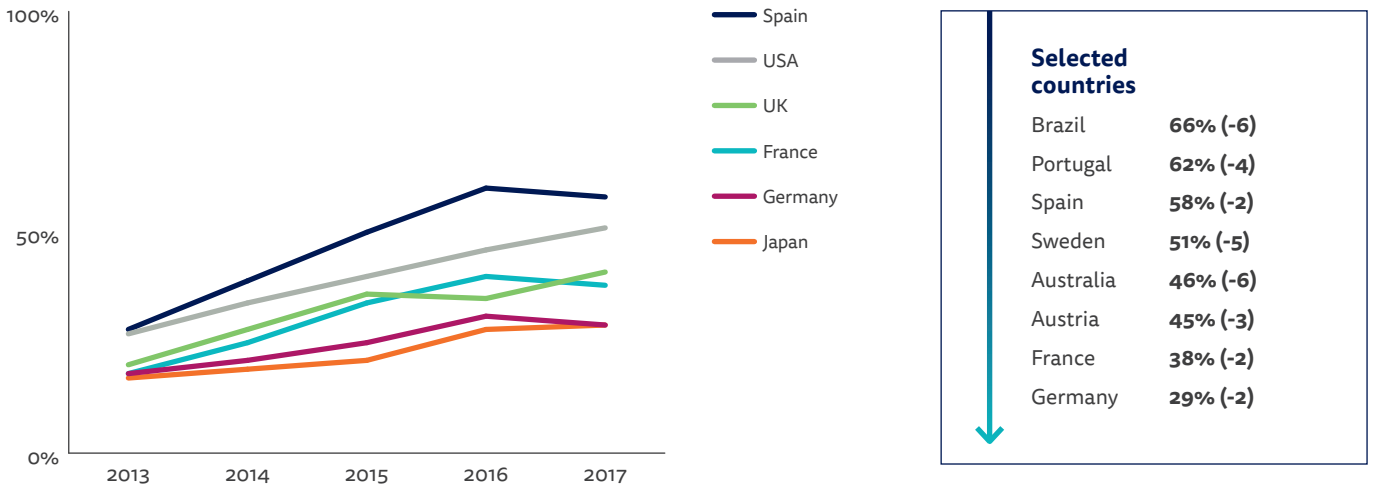
³ We have six years' data for the US, UK, France, Germany, and Denmark. In other cases we have been polling for a shorter period of time.

SOCIAL MEDIA GROWTH SLOWS DOWN, MESSAGING UP

It is striking that, outside the United States and United Kingdom, growth in the use of social media for news seems to be flattening out. In most countries growth has stopped and we have seen significant declines in Portugal (-4), Italy (-5), Australia (-6), and Brazil (-6).

This may just be a sign of market saturation, or it may relate to changes in Facebook algorithms in 2016, which prioritised friends and family communication over professional news content. Another explanation for any wider slowdown could be that people are spending less time with social networks and more time with messaging applications.

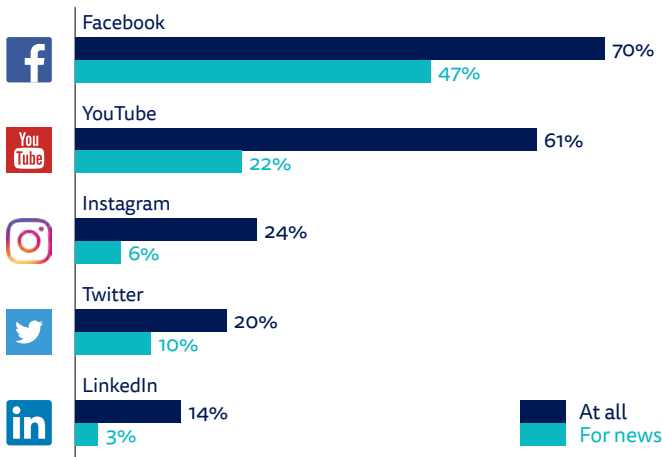
SOCIAL MEDIA AS A SOURCE OF NEWS: 2013-2017 – SELECTED COUNTRIES



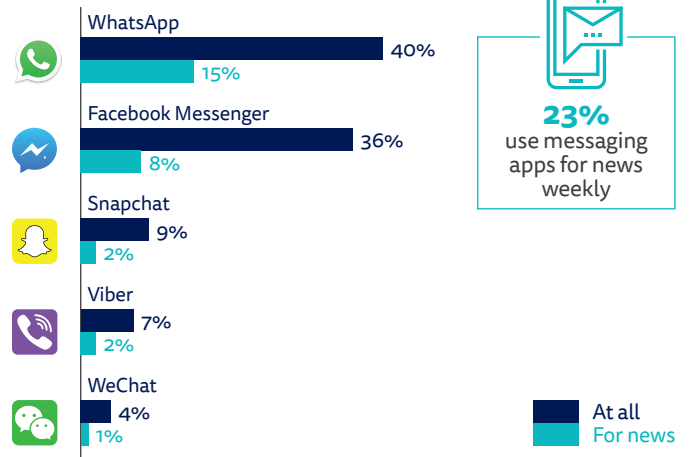
Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply. Base: Total sample 2013-2017 in each country. Note: 2014 data has been estimated because of an issue with randomisation of news sources in the questionnaire.

TOP SOCIAL NETWORKS AND MESSAGING APPLICATIONS – ALL MARKETS

Social Networks



Messaging Applications









Q12a/b. Which, if any, of the following have you used for any purpose/for news in the last week? Please select all that apply. Base: Total sample: All markets = 71,805. Note: Figure of 23% for the use of messaging apps for news does not include data from South Korea.

THE RISE OF MESSAGING APPLICATIONS FOR NEWS

Overall around a quarter (23%) of our respondents now find, share, or discuss news using one or more messaging applications. We've been tracking the growth of WhatsApp for some time but its use for news has jumped significantly in the last year to 15%, with considerable country-based variation. Over half of our sample in Malaysia (51%) says they have used the app for sharing or discussing news in a given week, but just 3% in the United States. Viber is a popular choice in parts of Southern and Eastern Europe, while a range of chat applications are used for news across Asia, including WeChat in Hong Kong (14%) and Malaysia (13%), Line in Taiwan (45%) and Japan (13%), while home-grown Kakao Talk (39%) is the top messaging app in South Korea.

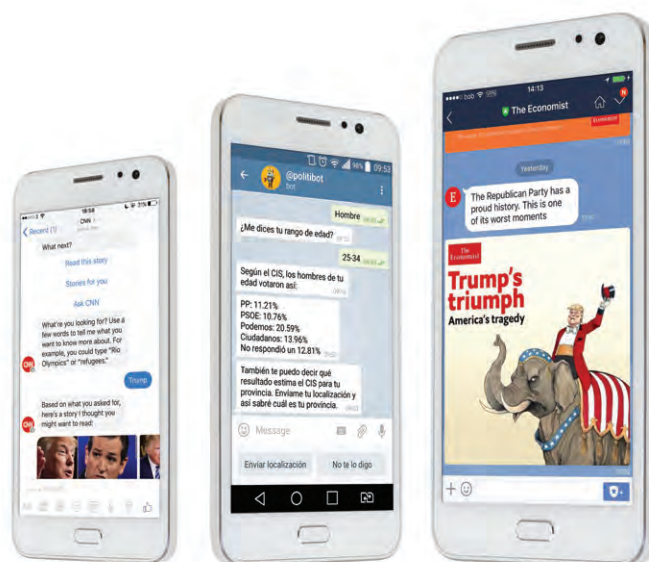
TOP MESSAGING APPS FOR NEWS – SELECTED MARKETS

	WhatsApp		FB Messenger
Malaysia	51%	Greece	17%
Brazil	46% (+7)	Portugal	16%
Chile	39%	Mexico	16%
Singapore	38%	Romania	15%
Hong Kong	36%	Norway	10%
Spain	32% (+8)	Poland	10%
	Viber		Line
Croatia	14%	Taiwan	45%
Greece	10% (+2)	Japan	13%
	We Chat		Kakao Talk
Hong Kong	14%	South Korea	39%
Malaysia	13%		

Q12b. Which, if any, of the following have you used for news in the last week? Please select all that apply. Base: Total sample in each market.

The bulk of messaging use for news is currently happening in Asia and Latin America, but more closed and private messaging also allows users to share without fear of embarrassment – sharing significantly more photos than on more open networks like Facebook. Price is also a factor, with free WhatsApp use often bundled in with phone contracts. Many of these apps also offer encryption, which is particularly relevant for communication in markets where it can be dangerous to share politically sensitive information. This is true in Hong Kong where WhatsApp, We Chat, and Facebook Messenger are popular and in Turkey where a quarter of our sample (25%) share news via WhatsApp.

Historically news brands have struggled to distribute news through these private spaces, because content is delivered directly between peers. Few chat apps offered company profile pages or push-advertising as a way of marking them out from increasingly commercial social networks. But in recent years that has begun to change as they have started to become platforms in their own right. Over 30,000 bots (services that are programmed to have conversations around news, sport, or weather) have been created on the Facebook Messenger platform since launch in April 2016.



FACEBOOK DOMINATES BOTH SOCIAL NETWORKS AND MESSAGING

The growth of messaging comes as an extra layer on top of social networking rather than as a replacement. The vast majority (78%) of those using a messaging application for news ALSO use at least one social network for news. More generally about a third of our sample (32%) use two or more social networks or messaging apps in a given week.

These trends towards multiple networks are unlikely to worry Facebook. The company owns WhatsApp and Messenger, the two most popular messaging apps, along with Instagram, which has been incorporating many of Snapchat's most popular features. Eight in ten (80%) touch a Facebook product weekly for any purpose, while over half of our sample (54%) uses one for news. Alongside Google, the company has acquired and is maintaining enormous power over the discovery and distribution of content.

 **80% USE A FACEBOOK PRODUCT WEEKLY FOR ANY PURPOSE**

OTHER FORMS OF NEWS AGGREGATION PICK UP MOMENTUM

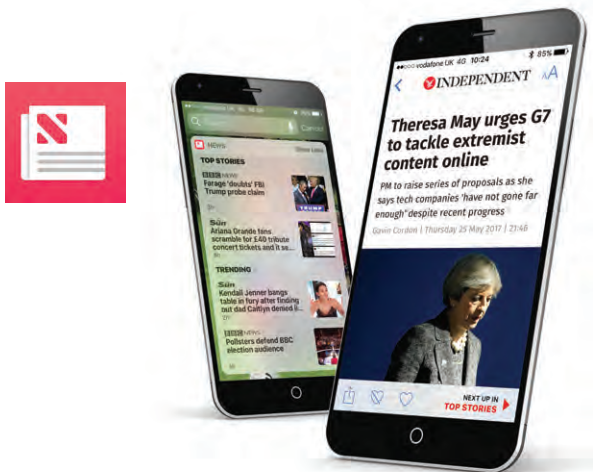
While exposure to news on social media is often incidental, the past few years have seen the growth of aggregation services that are more of a destination for news.

On a mobile phone in particular, where it can be difficult to move quickly between multiple apps and websites, the convenience of a one-stop-shop can be compelling. Sometimes these news aggregations are stand-alone products (Flipboard, SmartNews), at other times they are part of a wider service (Apple News, Google News, Snapchat Discover, Kakao Channel, and Line News). This second group – that are both destinations in their own right and allow content to hook into established eco-systems – are currently showing the strongest growth in our data.




Apple News has been one of the biggest gainers over the past year following the release of the Spotlight news feed and the ability to subscribe to rich-media mobile alerts for favourite publishers. These two features together seem to have supercharged usage, with a number of publishers telling us that up to a third of their mobile traffic now comes from the app or the related Spotlight news widget. The Apple News app is only available in the US, UK, and Australia, where our survey data suggest it is used by around a quarter of iPhone users,⁴ but the Spotlight feature is available in many more countries.

APPLE NEWS GROWTH

Personalised Alerts + Spotlight → Apple News Story



Weekly Reach


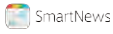


-  **25% of iPhone users** – 13% in 2016 (+12)
-  **25% of iPhone users** – 8% in 2016 (+17)
-  **18% of iPhone users** – 12% in 2016 (+6)



Google News has also improved mobile integration with the main Google search index through a series of branded carousels – part of its wider Accelerated Mobile Pages (AMP) initiative. The resulting pages are hosted by Google partly to ensure fast downloads but – as with Apple News – the branding is managed by the publishers themselves. Some participating news brands report a significant proportion of mobile traffic now coming from AMP pages.

Google News is widely used across markets, while other aggregators are strong in particular regions. Reddit has always struggled to expand beyond the United States (7%) and is little used in Europe. SmartNews and a range of other mobile aggregators are widely used in parts of Asia, reaching 11% of Japanese respondents.

WEEKLY USAGE OF SELECTED NEWS AGGREGATORS – SELECTED REGIONS

Service	North America	EU	Asia	Latin America
 Google News	13%	10%	21%	21%
 SmartNews	3%	2%	6%	4%
 Flipboard	5%	2%	5%	3%
 reddit	7%	3%	4%	3%

Q10c_2016. When using the internet for news, have you used any of the following sites or mobile apps that aggregate different news links in the last week? Please select all that apply. Base: Total sample = 4269, EU = 40,312, Asia = 11,142, Latin America = 8012. Note: Figures are average of markets with region, weighted equally.

Another story of growth comes from Snapchat’s Discover portal, which offers publishers like *Le Monde*, CNN and the *Wall Street Journal* the opportunity to reach a younger audience. Snapchat Discover has been available in the US, UK, and Australia, with the first non-English speaking versions rolling out in France in September 2016, and Norway and Germany in early 2017. Our data show increased traffic over the past year amongst the much-prized 18–24s target audience. This has been driven by more prominent placement in the app and allowing users to subscribe directly to Discover content from individual publishers.

SNAPCHAT DISCOVER GROWTH

-  **9% reach with 18-24s**
Launched Sep 2016
-  **14% reach with 18-24s**
Launched Feb 2016
-  **10% reach with 18-24s**
<1% with over 35s
-  **23% reach with 18-24s**
12% in 2016



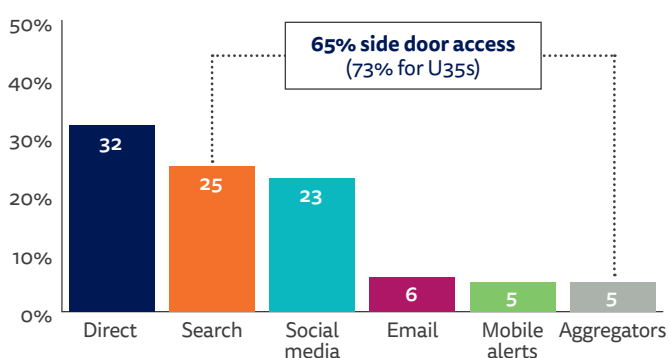
⁴ This equates to between 8 and 12% of smartphone users in those countries.

HOW THE MIX OF GATEWAYS TO NEWS IS SHIFTING ...

Despite the rise of aggregators, social media and search remain the most important gateways to online content, alongside traffic coming to their own websites and apps.

Looking at preferred ways of getting to content across our entire 70,000 sample we see that destination websites and apps (direct access) remain slightly ahead of search and social. But if we add together preferences for all other routes, two-thirds of web users (65%) now prefer to use a side-door of some kind, rising to three-quarters (73%) for under-35s.

PREFERRED GATEWAY TO NEWS CONTENT – ALL MARKETS



Q10a_new2017_rc. Which of these was the ****MAIN**** way in which you came across news in the last week? Base: All who used a news gateway in the last week: All markets = 66,230

At the same time, we also find that behind these averages there are very different market-based preferences for how people discover and access news.

- People in Scandinavia and the UK are more likely to go directly to a website or app. Here strong commercial and public service brands have built and marketed powerful news destinations.
- By contrast social media are a hugely popular starting point in Latin America as well as some Central and Eastern European countries.
- Many Asian markets have a unique model where individual media brands are often subsumed within giant portals. Yahoo plays this role in Japan as do Naver and Daum in South Korea, where aggregators pay content providers an undisclosed amount (believed to be around \$30m a year) for content published through their platforms.

- Email has made a comeback in many markets on the back of more personalised technology and mobile delivery. In Belgium more people (34%) access news via email than through social media. In the United States, where a quarter use email for news (23%), the charge has been led by new pure players like Quartz as well as the *Washington Post*, which offers around 70 newsletters as part of a strategy to drive both habit and subscription.
- Mobile alerts and notifications are most popular in Taiwan (32%) and Hong Kong (27%), as well as Sweden (22%). They have also grown strongly over the last year in the United States (20%) where publishers have been investing heavily in driving more content to the lockscreen.

TOP MARKETS FOR EACH GATEWAY – SELECTED MARKETS

Direct		Social	
	Finland 67%		Chile 64%
	Norway 67%		Argentina 58%
	Sweden 59%		Hungary 58%
	UK 54%		Romania 55%
Search		Aggregators	
	Poland 62%		Japan 40%
	Turkey 62%		South Korea 37%
	South Korea 60%		Taiwan 31%
	Czech Republic 59%		Hong Kong 25%
Email		Mobile Alerts	
	Belgium 34%		Taiwan 32%
	Portugal 30%		Hong Kong 27%
	United States 23%		Turkey 24%
	France 22%		Sweden 22%

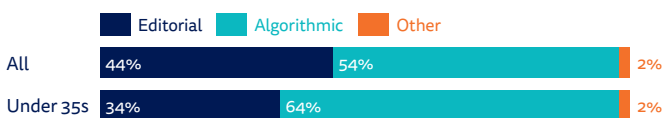
Q10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? Please select all that apply. Base: Total sample in each market. Note: Showing selected markets with high percentage weekly usage of each pathway to news.

For more on news brands and access see country pages in Section 4.

MORE PEOPLE ARE DISCOVERING NEWS THROUGH ALGORITHMS THAN EDITORS

We can also add up preferences for content that is selected by an algorithm (search, social, and many aggregators) and compare with that selected by an editor (direct, email, and mobile notifications). More than half of us (54%) prefer paths that use algorithms to select stories rather than editors or journalists (44%). This effect is even more apparent for those who mainly use smartphones (58%) and for younger users (64%). As we discovered in last year's focus groups, younger people tend to be more comfortable with algorithmic story selection, perhaps not surprisingly given their heavy use of social media.

PREFERENCE FOR EDITORIAL OR ALGORITHMIC NEWS SELECTION? – ALL MARKETS

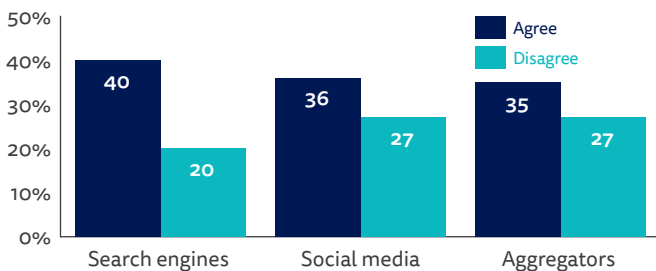


Q10a_new2017_rc. Which of these was the MAIN way in which you came across news in the last week? Base: Total sample/Under 35s: All markets = 66,230/19,138.

THE IMPLICATIONS OF MORE ALGORITHMIC SELECTION OF STORIES

A key question for policy makers is how this shift to discovering content through social media, search, and personalised aggregators is affecting the range and type of news we consume. Does it broaden or narrow our choices? Is it driving more extreme and polarised views? This year we have new evidence that, far from restricting content, algorithms are exposing most users to a greater range of online sources. Users of search, social media, and online aggregation services are significantly more likely to see sources they would not normally use (see chart below).

PROPORTION THAT AGREE THEY ARE EXPOSED TO SOURCES THEY WOULD NOT NORMALLY USE – ALL MARKETS



Q12Fi/ii/iii_2017_1. Thinking about when you have used social media/search engines/news aggregators...Please indicate your level of agreement with the following statement. – I often see news from outlets that I would not normally use. Base: All who used search engines/social media/aggregators for news in the last week: All markets = 16,925/48,551/28,441.

This evidence is backed up by verbal comments from survey respondents across multiple countries, many of whom welcomed the wider diversity of sources available through digital media, especially through social networks.

“There are different viewpoints and some things that the main media suppress in terms of political correctness.”

Male (62), UK

Social media, search, and aggregators are all different in the range of views they offer and the way they are accessed. However, other respondents felt that exposure to more sources may not be driving the ‘right’ kind of plurality – especially if information comes from less reputable providers or ones that carry more extreme or partisan views.

“Contradictory articles and trolling and conspiracy theory websites are everywhere and sow trouble.”

Female, France

“Too many people giving their version of things just leads to confusion for me.”

Female (53), UK

The extent to which users can control and personalise these three environments varies considerably. Aggregators largely offer news from a selection of reputable news organisations while social media and search start with a universal canvas and filter down from there. This is where algorithms come in, though our research shows human overrides are a significant part of the picture. In social media almost half of our respondents (45%) have actively managed the content of their feeds by adding or removing users, with around a third (30%) fine-tuning content in other ways, such as hiding content from particular users. This activity allows users to protect themselves from views they don't like, but it also opens up the possibility that they just end up seeing more of what they like.

For more on social media, incidental exposure, and echo chambers see section 3.4, p. 43.

ATTRIBUTION IN DISTRIBUTED ENVIRONMENTS

A second implication of the shift to distributed consumption through search, social, and aggregators relates to the level of attribution and recognition for news brands. In last year's report our survey suggested that it is often the platform rather than the publisher that gets the credit for the news, while focus group respondents talked about how Twitter and Facebook had broken some of the most important stories.

This year, as part of our *Digital News Report*, we conducted a study where we passively tracked usage by a representative sample of UK users and then 3,000 surveys were completed to see what they could remember about the story and the brand. Overall, we found that roughly two-thirds remembered the path through which they found the news story (Facebook, Google, etc.), but less than half could recall the name of the news brand itself when coming from search (37%) and social (47%). Respondents were more likely to remember the brand if they had a previous connection with it or used it as a main source.

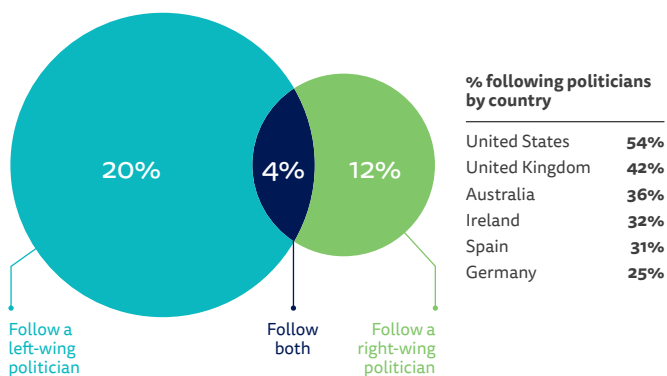
For more see the upcoming report *Attribution in a Distributed Environment* to be published by the RISJ in July 2017.

WE FOLLOW POLITICIANS WE AGREE WITH ON SOCIAL MEDIA AND AVOID THOSE WE DON'T

This year we've looked in more detail at how many people follow politicians on social media, and the extent to which people only follow those with similar views to themselves. Donald Trump is just one of a number of prominent politicians looking to use Twitter and other networks to talk directly to supporters, as well as to control the media agenda.

In a sample of six countries (US, UK, Ireland, Germany, Spain, and Australia), we found that over a third of social media users (37%) followed at least one politician or political party. Across countries, people who do follow politicians are most likely to follow a politician or party of the left (20%), followed by the centre (16%), while those on the right tend to get less attention (12%). This difference can partly be explained by age, given that younger groups who use social media heavily tend to be left aligned. High levels of political following in the United States (54%) reflect over a decade of using digital and social media in political campaigning, but it is still striking that they are twice the levels seen in Germany (25%). We tend to follow politicians we agree with; respondents on the left are five times more likely to follow left-leaning politicians on social media than politicians from the right. The same is true in reverse in equal proportion.

FOLLOWING POLITICIANS ON SOCIAL MEDIA - SELECTED COUNTRIES



Q12Gi_2017. When using social media for news (e.g. Facebook, Twitter or YouTube) have you followed or subscribed to a channel/page of a politician or political party? Please select all that apply. Base: Used social media for news in the last week: Selected countries = 7171. Note: Figures are based on average of data from US, UK, Australia, Ireland, and Spain.

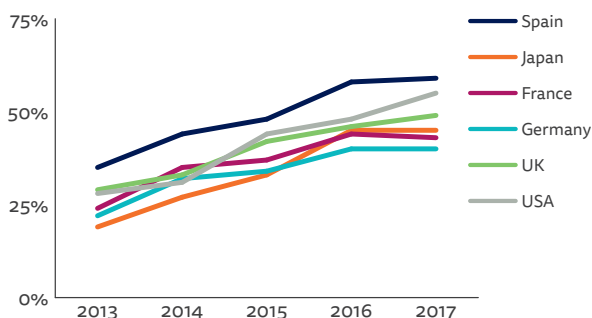
This suggests that following politicians on social media may be contributing to greater polarisation. On the other hand, we should remember that in a pre-digital age political activists would have spent a considerable amount of time with people who held similar views as well. What is different is the scale of this activity. Over half of social media users (54%) in the United States following politicians equates to around a third of the entire US online population.

For more details see *Following Politicians on Social Media* on our website digitalnewsreport.org

DEVICES FOR NEWS: MOBILE CONTINUES ITS ONWARD MARCH

If social media are reaching saturation, the same is also true for smartphones – at least in developed markets. In most countries, weekly reach for news is at a similar level to last year or falling, although we have seen increases in the US (55%) and UK (49%).

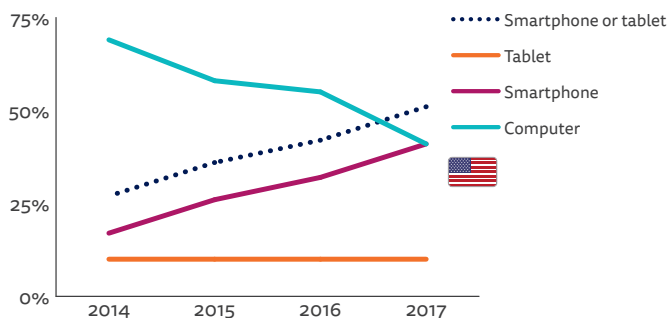
SMARTPHONE NEWS USE 2013-2017 - SELECTED COUNTRIES



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 2013-2017 sample in each country.

But this doesn't mean that the smartphone is becoming less important. Every year our dependence on these devices continues to grow. Taking the United States as an example we can see how, over time, far more people are using the smartphone as their MAIN device for news, while far fewer are relying on a desktop computer or laptop.

CHANGING DEVICE USE FOR NEWS 2014-2017 - USA



Q8b6_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: USA = 1926.

2017 marks the tipping point in the United States, United Kingdom, and Norway where smartphones have reached a par with computers in terms of news access, but other countries are at very different stages of development. In general, Asian and Nordic countries have moved furthest along the mobile-first path, with Central, Southern, and Eastern European countries still primarily using laptop or desktop computers to access news.

WHICH MARKETS ARE MOST AND LEAST MOBILE? – SELECTED COUNTRIES

Mobile first

	Hong Kong	(+36)
	Singapore	(+33)
	Chile	(+26)
	Sweden	(+22)
	Switzerland	(+7)



Tipping point

	USA
	UK
	Norway
	Netherlands
	Turkey



Mobile last

	Czech Republic	(-52)
	Poland	(-40)
	Greece	(-37)
	Hungary	(-33)
	Canada	(-24)

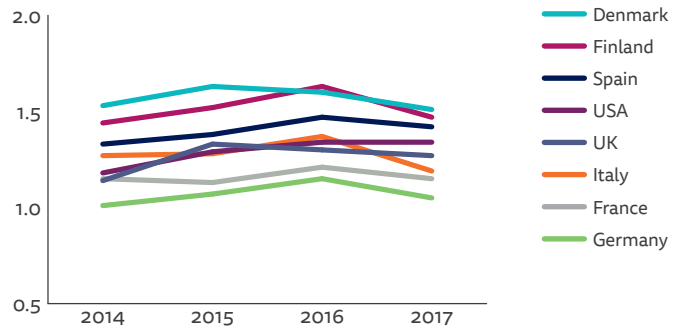


Q8b6_5. You've said you use the following devices to access news in the last week, which is your MAIN way of accessing online news? Base: Around 2000 in each market. Note: Figures showing the percentage point difference between those using smartphone and computer as main news source.

While some are still making the transition from computer to smartphone, younger populations in our survey are essentially starting with a mobile screen. This is particularly the case in Latin America where a quarter of our respondents in Mexico (24%), and Chile (25%) ONLY use a smartphone for news in a given week. The same is true in Singapore (26%), Malaysia (27%), and Hong Kong (31%).

Another measure of the smartphone's hold over our lives is that, in the UK and several other countries, the average number of devices used to access news weekly is falling. This makes little sense until we consider the changing way in which we are using our smartphones in the home. Over half (56%) use the device in personal spaces, up substantially from the figure two years ago. Almost half of smartphone users (46%) access news in bed and 32% read or watch news stories when they are in the bathroom or toilet. It is simply more convenient to pick up the device that is always with you, rather than seek out a computer or tablet in another room.

AVERAGE NUMBER OF DEVICES USED FOR ACCESSING NEWS – SELECTED 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 2014-2017 sample in each country. Note: Average includes smartphone, tablet, and computer only.

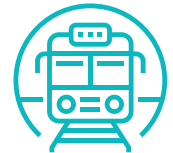
POPULAR LOCATIONS FOR USING THE SMARTPHONE FOR NEWS – ALL MARKETS



46%
use their smartphones for news in bed



32%
access news via smartphone in the bathroom/toilet



42%
access news via smartphones on public transport

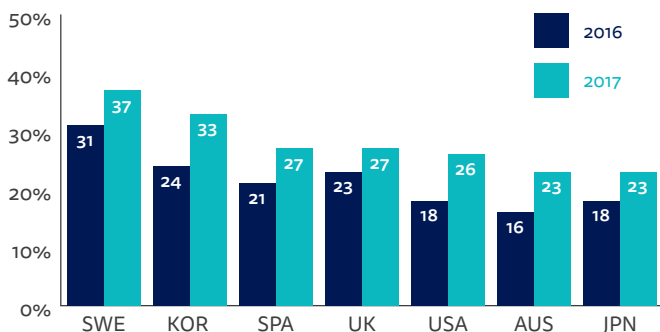
OPT_Q9a_2017_1. You say you have used the following to access news in the last week, in what location have you used these devices TO ACCESS NEWS? Please select all that apply – Smartphone Base: All who used smartphone for news in the last week: All markets = 40,464.

NEWS APPS MAKE A COMEBACK

As the smartphone extends its grip in the home, and becomes the central organising device of the digital age, it is worth reflecting on the implications for publishers.

As we have shown in previous years, smartphone users are much more likely to access via a side-door, increasing the importance of platforms such as social media. But our research this year suggests use of news apps may be making a comeback. After a period of little or no growth, we have seen a jump in the use of news apps in almost all countries (see charts on next page). This is much more likely to be about more regular usage by existing app users, rather than by some surge in new installs. Two key factors are likely to be at play: (a) more publishers have enabled deep linking to apps from search, social, and email; (b) the substantial increase in mobile notifications noted earlier, as publishers pursue loyalty strategies and take advantage of new platform capabilities. It is no coincidence that the biggest increase in app use has come in countries that have seen the biggest increase in mobile notifications (US, Australia, South Korea).

PROPORTION USING NEWS APPS WEEKLY - 2016-2017 - SELECTED COUNTRIES



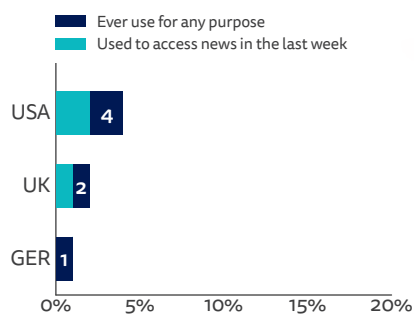
Q10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? Please select all that apply.
Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select all that apply. Base: Total 2016-2017 sample in each country.

ALEXA, WHAT'S THE NEWS?

For the first time this year we asked about the use of new voice-controlled digital assistants such as the Amazon Echo and Google Home. Until now, these have only been generally available in the United States as well as Germany and the United Kingdom (since 2016). A range of publishers such as CNN, the BBC, and Spiegel have created audio applications – such as news and weather summaries – specifically for these devices. Audio fact-checking services are also being developed. In the United States 4% of our sample use a voice-activated speaker – half of them for news. As these devices become more widely available, they could disrupt both the smartphone and the radio itself. They also help establish Amazon's role as the fourth major platform player in the news market.

EMERGING DEVICES FOR NEWS – USA, UK, GERMANY

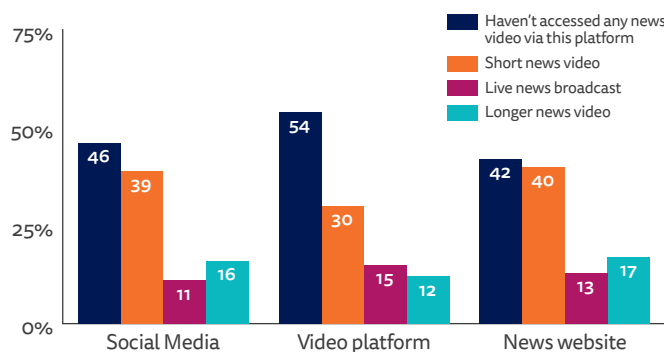
Voice-activated connected speaker



VIDEO NOT EVERYTHING IT WAS CRACKED UP TO BE?

After the product disruptions around auto-play video (2015) and live-social video (2016), consumption appears to have settled down into a more regular pattern. This year, instead of focusing on a headline figure, we have attempted to understand news consumption in three different environments: (a) feed-based social networks like Facebook and Twitter, (b) search-based platforms like YouTube, and (c) news websites and apps. We also categorised content as short-form (less than five minutes), long-form (more than five minutes), and live. The limitations of survey methodologies mean that these numbers will not be 'precisely' right, but they give us a broad overview of the type of content being consumed, as well as the location of that consumption, across all 70,000 respondents.

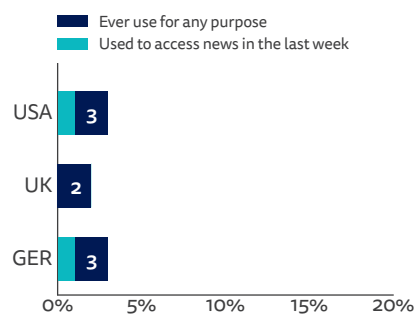
VIDEO CONSUMPTION BY PLATFORM AND BY TYPE – ALL MARKETS



Q11a_2017. Which type of news related video (eg news, politics, sport, tech, entertainment, lifestyle) if any, have you watched online in the last week? Please select all that apply. Via social media/Via video platform/On a news website. Base: Total sample: All markets = 71,805.

There are three key takeaways from these data. (1) Most video being consumed is short. (2) On every platform, around half of users don't consume any online news video in a given week. (3) Only a minority of video is being consumed on news websites and this is particularly true for younger groups and in countries where social media are a bigger part of the media mix. As a format, video is already far more distributed than text.

Smartwatch



Q8a/b. Which, if any, of the following devices do you ever use (for any purpose)/for news in the last week? Please select all that apply. Base: Total sample: USA = 2269, UK = 2112, Germany = 2062.

Taken together, a number of these factors are making video harder to monetise. The biggest player, Facebook, currently does not offer any significant monetisation for anything under 90 seconds while on news websites current implementations of pre-roll ads are widely disliked by users, restricting consumption.

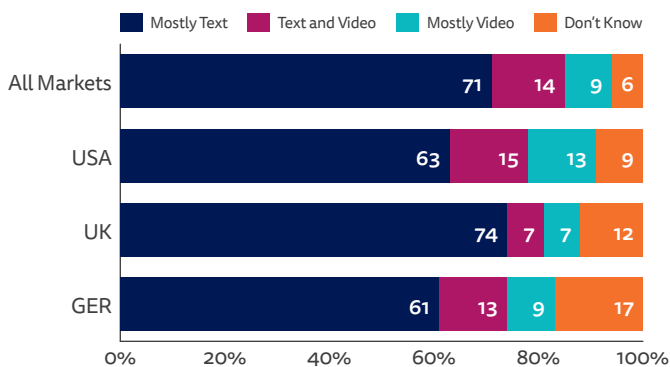
“If I have thirty seconds to get actual news I don’t want to spend that thirty seconds going through an advertising video.”

Focus group (20–34), USA

Both in focus groups and in our wider survey we asked respondents about this contentious issue. The largest group felt five seconds or less would be an acceptable exchange for valuable news content, with over two-thirds (69%) voting for ten seconds or less.

Despite greater exposure to online video news, we find that overall preferences have changed very little since we started tracking this issue four years ago. Across all markets over two-thirds (71%) say they mostly consume news in text, with 14% using text and video equally. This number has grown slightly in the United States but remains at under 10% in the UK and Nordic countries where more users get their online news direct from the provider. Importantly, there are no significant age differences; young people also overwhelmingly prefer text. Having said that, in focus groups and open responses, we do find that video is increasingly valued as part of a content mix, adding drama and context to important stories, to breaking news events such as the recent terror attacks in Paris, Nice, Manchester, and Brussels – as well as adding to the trustworthiness of content.

PREFERENCE FOR TEXT OR VIDEO FOR NEWS – SELECTED MARKETS



Not either but both



Text provides control and speed when in information seeking mode



Video comes into its own by adding drama, context or reality to events. It also adds credibility to text (seeing is believing).

OPTQ11D. In thinking about your online news habits, which of the following statements applies best to you? *Base: Total sample in each country/all markets.*

For the moment, publishers are stuck in a bind. They feel that they need to invest more in video because consumers increasingly expect to view as well as read news, but there is very little commercial reward for the most popular formats.

FAKE NEWS, TRUST, AND POLITICAL POLARISATION

The widespread public debate over fake news and media bias has prompted us to look in detail at the issue of trust in the news media and in social media. Part of that has been to investigate a link with political polarisation and perceived media bias in a number of countries. We have explored these issues through our core survey, through analysing open-ended answers on trust from 10 countries and from our focus group activity in a smaller group of countries including the United States.⁵

Definitions of ‘fake news’ are fraught with difficulty and respondents frequently mix up three categories: (1) news that is ‘invented’ to make money or discredit others; (2) news that has a basis in fact, but is ‘spun’ to suit a particular agenda; and (3) news that people don’t feel comfortable about or don’t agree with.

In our analysis very few people can accurately recall having seen items in category 1, except in the United States. Indeed, respondents in Germany and France routinely use the English phrase ‘fake news’, suggesting that this is something that has been largely imported rather than a home-grown phenomenon. On the other hand, the issue of political bias and the limits of free expression are increasingly the subject of heated debate in many countries – even if social media may not be entirely to blame.

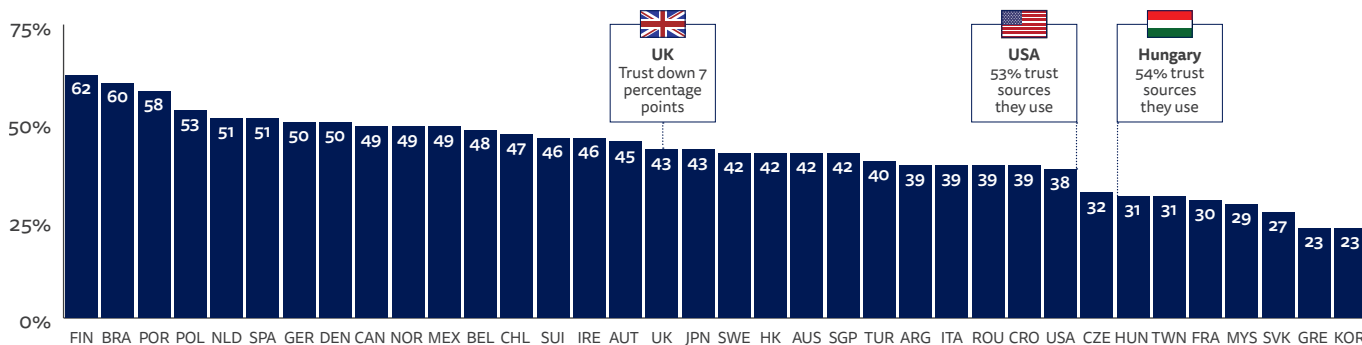
Our research suggests that the vast majority of news people consume still comes from mainstream media and that most of the reasons for distrust also relate to mainstream media.

Across all of our countries we see a similar pattern to last year, with trust highest in affluent Northern European and Scandinavian countries as well as Portugal and Brazil. Once again Central, Southern, and Eastern European countries tend to be at the other end of the scale, along with some Asian countries where media are considered to be too close to government. In Greece and South Korea less than a quarter of respondents (23%) agreed that you could trust the news most of the time.

In the United States the headline rate (38%) is up, although there is a 15-point gap between this and trust in the sources you use (53%). Only Hungary, another deeply polarised country, has a bigger gap between general trust (31%) and the sources you use (54%).

⁵ UK, US, Canada, Australia, France, Germany, Denmark, Greece, Spain, and Ireland. Focus groups held in UK, US, Finland, and Spain.

OVERALL TRUST IN NEWS MEDIA – ALL MARKETS



Q6_2016_1/6. Please indicate your level of agreement with the following statements. - I think you can trust most news most of the time/I think I can trust most of the news I consume most of the time Base: Total sample in each market.

To understand more about polarisation, we have mapped respondents' political beliefs on a left-right spectrum and combined this with the sources of online news they use. The mid-point represents the mid-point of political opinion of our respondents; in the country in question the size of each bubble represents volume of consumption for each brand.⁶

The resulting map for the United States (see below) shows a deeply polarised media landscape, which reflects an equally polarised society. The websites of TV networks like ABC, NBC, and CBC are used far more by people who self-identify as left-wing, along with the *New York Times* and *Washington Post*. By contrast the Fox News and Breitbart websites are mostly used by people with right-wing views. Arguably the gap on the right of this map has provided space for a range of hyper-partisan right-wing sites to emerge over the last few years. The map shows just online sites, but we should remember that polarisation also exists in the print and TV markets. Two-thirds of right-wingers watch the Fox News TV channel but only 11% of those who identify on the left. The hyper-partisan websites are even more split, with 19% of those on the right using Breitbart.com but only 2% on the left.

We can compare the US media and audience landscape with two very different European countries. The UK online map uses the same scale but shows less polarisation amongst the top online news sources. A third of those who self-identify on the right read the Mail Online, 14% in the centre, and 8% on the left. There are a few hyper-partisan sites (Breitbart and the Canary) but they attract much smaller audiences than in the United States. The BBC, which sits in the centre of our chart, is used relatively equally by those on the left, centre, and the right and provides a common set of facts with a combined online/offline weekly reach of 77%. Having said that, the polarising Brexit debate has increased distrust in the mainstream media generally from those on both ends of the debate, with the BBC particularly under fire.

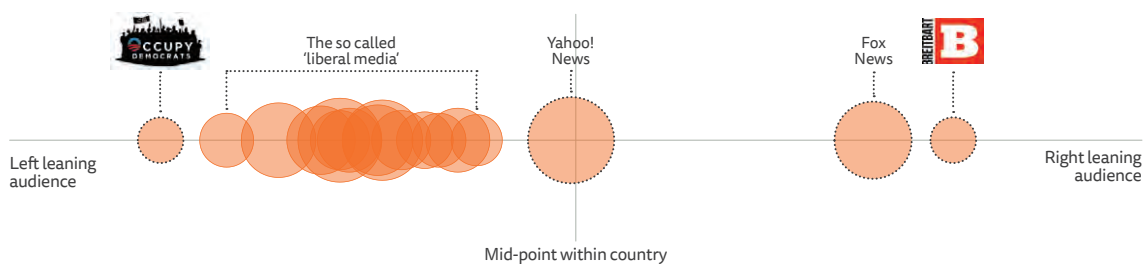
"I used to trust and value the BBC news but now it's just a mouthpiece for the liberal leftists."

Male (52), UK

"Even the BBC tends to support [a] far right winged party nowadays."

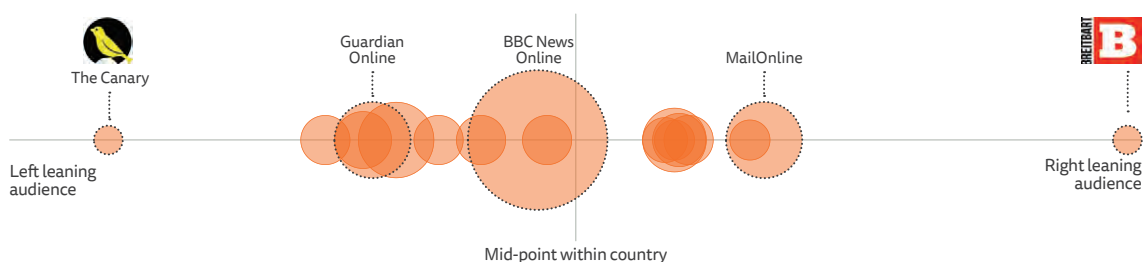
Female (54), UK

AUDIENCE MAP FOR THE TOP ONLINE NEWS BRANDS (INCLUDING NEW POLARISED NEWS BRANDS) – USA



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? Q5b. Which of the following brands have you used to access news ONLINE in the last week? Please select all that apply. Base: Total sample: USA = 2269. Note: Respondents who answered don't know to Q1F were excluded.

AUDIENCE MAP FOR THE TOP ONLINE NEWS BRANDS (INCLUDING NEW POLARISED NEWS BRANDS) – UK



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? Q5b. Which of the following brands have you used to access news ONLINE in the last week? Please select all that apply. Base: Total sample: UK = 2112. Note: Respondents who answered don't know to Q1F were excluded.

⁶ Polarisation score for each brand is the difference between the mean ideology (measured on a seven-point scale using Q1F) of the audience for each brand and the mean ideology of the population as a whole, expressed in multiples of the standard deviation the mean ideology of the population as a whole.

Finally, we find a very different picture in Germany where all the media brands are clustered around the centre.⁷ The mainstream media in Germany is sometimes described as corporatist; not sufficiently challenging of the political and economic elites. During the immigration crisis of 2015 and 2016, right-wing groups revived a phrase from the Nazi era, Lügenpresse (lying press), to complain about suppression of debate and perceived left-wing bias. On the other hand this corporatist mix suits most Germans. Given the weight of history, most are wary of allowing extreme views to flourish in digital and social media.

"I don't always trust the media, especially in matters relating to the refugee crisis"

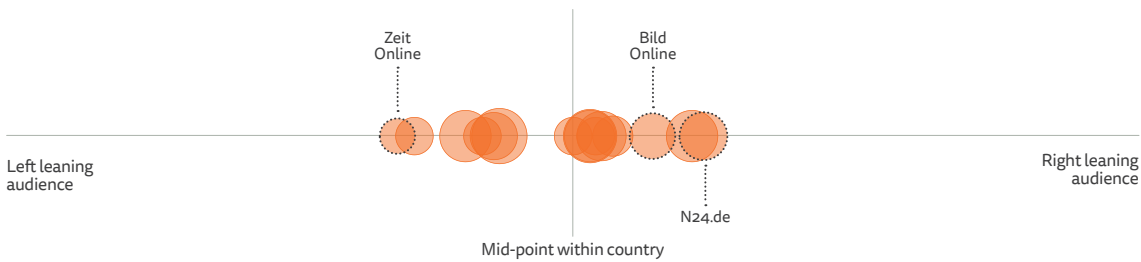
Female (56), Germany

"There is a lot that is hushed up in the media. There is a big difference between German and Arab media even when they report the same story."

Female (30), Germany

For further details see Polarisation maps in section 4, pp. 54-129.

AUDIENCE MAP FOR THE TOP ONLINE NEWS BRANDS – GERMANY

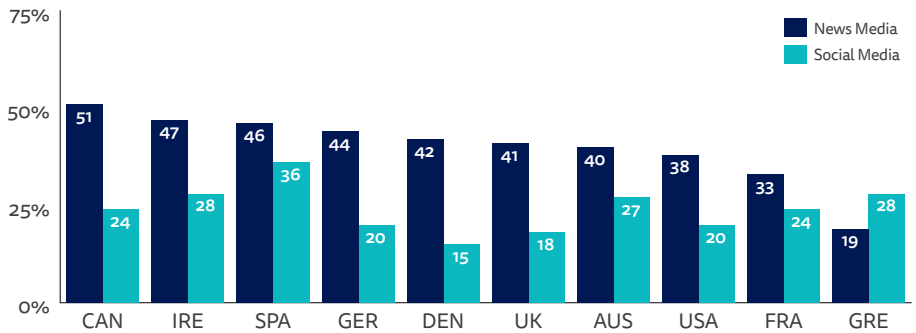


Q1F. Some people talk about 'left', 'right' and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q5b.** Which of the following brands have you used to access news ONLINE in the last week? Please select all that apply. Base: Total sample: Germany = 2062. Note: Respondents who answered don't know to Q1F were excluded.

SEPARATING FACT FROM FICTION

In our survey we find a big difference between the news media and social media in their ability to separate fact from fiction. In countries like the US (38%/20%), Canada (51%/24%), and the UK (41%/18%), people are twice as likely to have faith in the news media. Only in Greece do more people trust social media (19%/28%) but this has more to do with the low opinion of the news media in general than the quality of information in their news feeds.

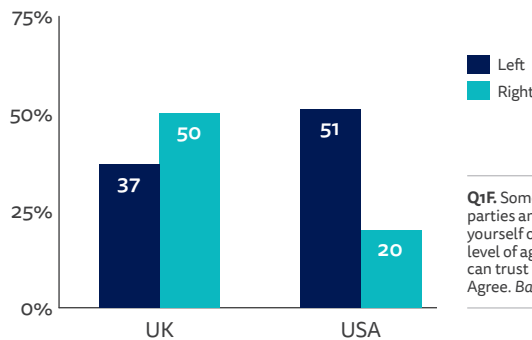
PROPORTION THAT AGREE THE NEWS MEDIA/SOCIAL MEDIA DOES A GOOD JOB IN HELPING SEPARATE FACT FROM FICTION – SELECTED COUNTRIES



Q6_2017_1/2. Please indicate your level of agreement with the following statements - The news media/social media does a good job in helping me distinguish fact from fiction. Base: Total sample in each country

In analysing open-ended responses to these questions in ten countries we find a compelling link between distrust in the media and concerns about political bias, with over half the comments relating to this issue. In the United States, the vast majority of mistrust is generated from the right (Trump supporters and Republicans), because of the media's perceived 'liberal agenda'. In the UK, mistrust is more likely to come from the left, due to a sense that the right-wing press is pushing a pro-Brexit and pro-government agenda.

TRUST IN THE NEWS BY POLITICAL ALLEGIANCE – UK AND US



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? **Q6_2016_1.** Please indicate your level of agreement with the following statements: - I think you can trust most news most of the time. Showing Agree/Tend to Agree. Base: Left/Right: UK = 494/274, USA = 530/533.

⁷ Polarisation score for each brand is the difference between the mean ideology (measured on a seven-point scale using Q1F) of the audience for each brand and the mean ideology of the population as a whole, divided by the standard deviation of the mean ideology of the population.

In terms of distrust in social media, many of the same themes emerge. There is a sense in some countries that feeds are being overwhelmed or polluted by different political agendas.

“It’s a petri dish for ideological fake news.”

Male (32), USA

“There is no telling who is sharing what, and most titles are clickbait-y, so people share them without actually reading what the information is within the article.”

Female (21), USA

Platforms like Facebook are increasingly trying to find answers to these problems by working with fact-checkers to show when stories are disputed before they are shared. They are also looking to find ways of exposing users to content beyond their political bubbles through news related content experiments.⁸

Once again, however, it is dangerous to overstate these issues, which are seen as much less of a problem in many European countries and for younger respondents. For many of those who have configured their own feeds, social media can provide a convenient stream of reliable news, often exposing audiences to new perspectives.

“You find information there that you can’t find on the major news channels. Certain sites (e.g. Demeure du Chaos) publish quite well-argued articles that are outside the box.”

Male (59), France

“For the most part, I think it’s easy to spot fake news. I’m not influenced by social media. I know how to weigh up the different sides of an argument.”

Female (59), France.

THE VALUE OF DIFFERENT BRANDS

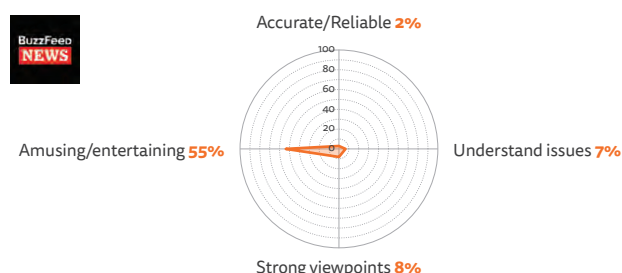
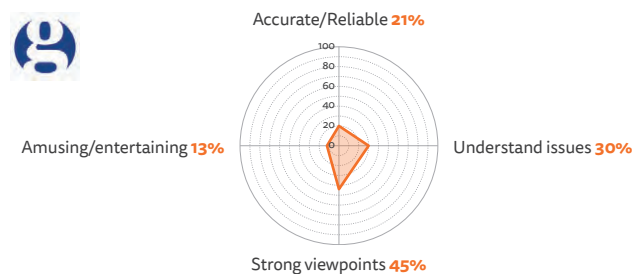
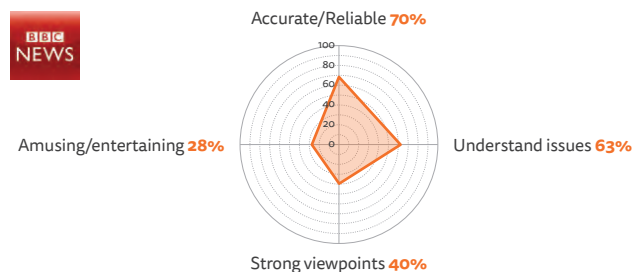
Another important finding this year is that certain brands play a disproportionate role in creating trust and distributing common facts, particularly on serious issues like politics and international news.

For the first time we publish data about people’s perception of four key attributes of online news consumption: (1) accuracy and reliability, (2) helping with understanding complex issues, (3) communicating strong viewpoints and opinions, and (4) providing amusing and entertaining content.

Looking at the BBC in the UK, we can see that two-thirds of its users (70%) think it is ‘best for’ accurate and reliable news but only 28% think it’s good at amusing or entertaining. Less than a quarter of Guardian readers (21%) think it is best for reliable news (because the BBC plays that role for many), but almost half (45%) value it for opinion and viewpoints.

Meanwhile BuzzFeed News, despite heavy investment in high-quality investigations this year, is still struggling to cast off its legacy as purveyor of listicles and quizzes and is instead valued most for entertaining and amusing content by its own user base.

ATTRIBUTES FOR SELECTED NEWS BRANDS – UK

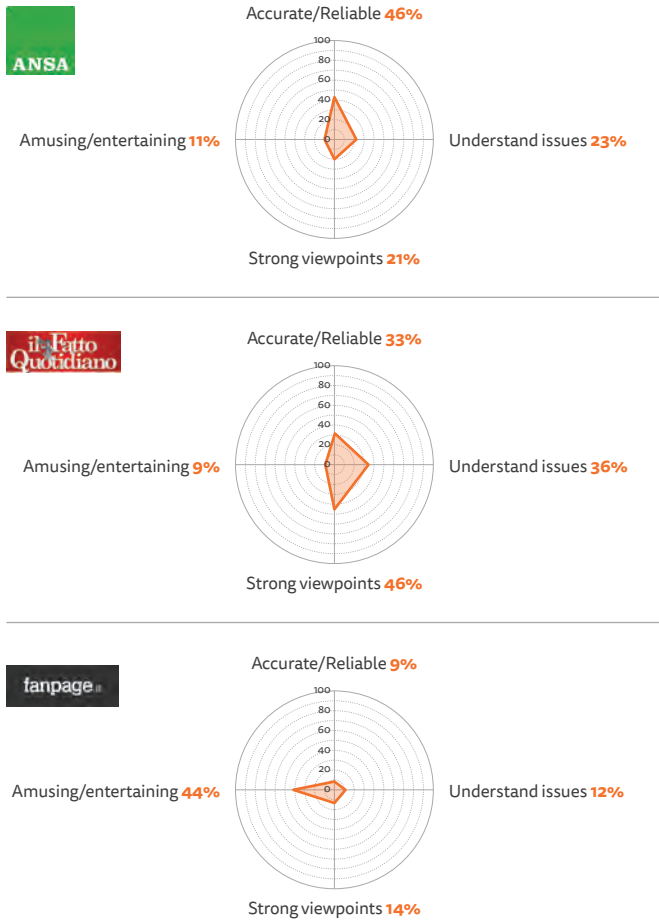


Q5c_2017_rc_1-4. You say you use the following brands for ONLINE news. In your experience, which of these is best for – Providing accurate and reliable news/Helping me understand complex issues/Providing strong viewpoints or opinions/Amusing or entertaining me. Base: All that used BBC News online/Guardian online/BuzzFeed News in the last week: UK = 1076/378/174.

In Italy, we find a slightly different picture with no single brand considered best for accurate and reliable news. This function is more widely shared between the online edition of a number of major newspapers (*La Repubblica*, *Corriere della Sera*), TV channels online such as TG24com and the news agency ANSA, which has developed a consumer reputation for fast reliable news (46% of its users consider it is best for this). As in the UK, it tends to be organisations with a newspaper background like *Il Fatto Quotidiano* that score best for strong opinions (46% of its users rate it best here). Fanpage.it, which has focused distribution via social channels is considered best for amusing and entertaining content.

⁸ <https://newsroom.fb.com/news/2017/04/news-feed-fyi-new-test-with-related-articles>

ATTRIBUTES FOR SELECTED NEWS BRANDS – ITALY



Q5c_2017_rc_1-4. You say you use the following brands for ONLINE news. In your experience, which of these is best for – Providing accurate and reliable news/Helping me understand complex issues/Providing strong viewpoints or opinions/Amusing or entertaining me. Base: All that used ANSA/il Fatto Quotidiano/Fanpage in the last week: Italy = 422/308/163.

For further details on brand attributes see relevant country pages.

The dynamics of online news, where consumers can pick and mix between brands, means there is now less need for any one brand to deliver the entire package. In many countries, there are a small number of brands that people turn to for general news and this is requiring other organisations to be more distinctive and more specific in terms of their focus.

These dynamics are still emerging but they mark a major change from the shape of the media landscape in the offline space.

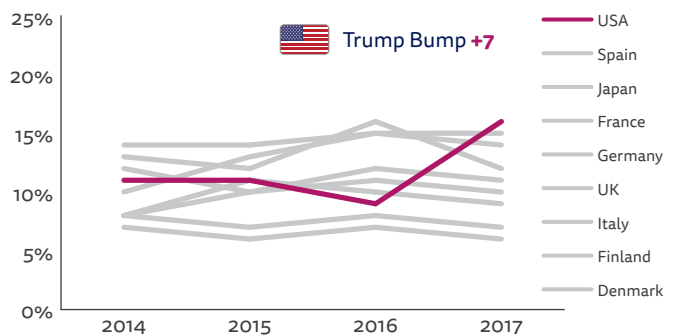
For an industry perspective on these trends, see Melissa Bell's essay 'Viewpoint: We Broke the News' p. 30.

THE BUSINESS OF JOURNALISM

This year our survey included an extended set of questions about attitudes to paying for news. These data are supported by diaries and focus groups in four countries: the US, UK, Finland, and Spain. In general, we find a continued reluctance to pay for online news in any form – overall more than eight in ten (84%) have not paid in the last year. Having said that, we have seen a significant increase in the United States in the wake of the Trump victory where overall payment (including one-off payments and donations) has risen to 16%, with ongoing digital subscriptions running at half that (8%). These findings are consistent with figures released by news organisations, which show a significant Trump bump. The *New York Times* added around 500,000 digital subscribers in the six months since the election and the *Wall Street Journal* has added around 200,000 members. Our data show much of this growth has come from those on the left and the young – effectively showing support for the media's efforts to hold the president and his policies to account.

Over a quarter of respondents in the United States (29%) said a key reason for paying was because they 'want to help fund journalism'. That figure is twice as high as the all-country average (13%) and helps explain why we've seen such a change in the last year.

ONLINE NEWS PAYMENT REMAINS FLAT BUT THERE HAS BEEN AN UPSURGE IN THE USA – SELECTED COUNTRIES



Record growth since November 2016



Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription or one off payment for an article or app or e-edition). Base: Total 2014-2017 sample in each country.

Donations are up too – tripling in the United States and Australia in the last year, albeit from a very low base. The *Guardian* has reported selling 230,000 memberships at between £6 and £60 a month by March 2017, along with 160,000 one-off donations from around the world.⁹

⁹ <http://www.telegraph.co.uk/business/2017/04/27/guardian-claims-progress-heavy-losses-holds-talks-manchester>

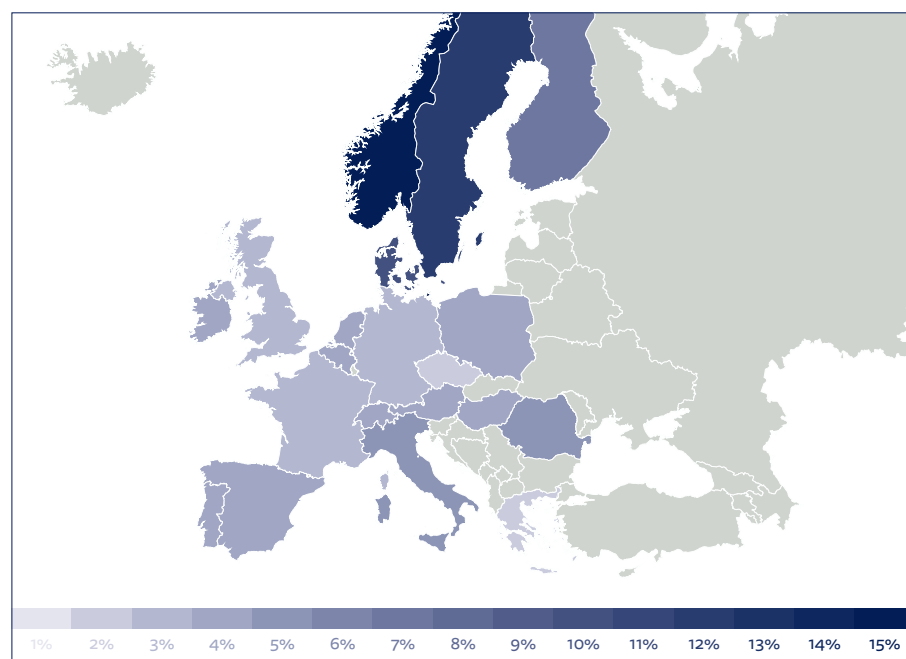
In terms of the wider international picture, the biggest success story is in the Nordic region (see map), where rates of ongoing digital subscription are as high as 15% in Norway and 12% in Sweden, 10% in Denmark and 7% in Finland. Much of this relates to the strong reading tradition alongside a culture of print subscription, which has been transferred to digital through bundling and free trials. We've also seen a wide range of innovation in paywall techniques in this region including metered, freemium, and in some cases (e.g. *Aftenposten*) both at the same time. This region is also at the cutting edge of technology, using big data models to predict churn and experimenting with dynamic differential pricing for new customers.

Despite this the main reasons cited for why non-payers remain reluctant to part with their cash are the widespread availability of free content (54%), and the fact that a 'favourite brand' doesn't currently charge (29%). A much smaller proportion says news is not worth paying for. In focus groups too, we detected a sense that many more could be persuaded.

"While it's free, I'll happily not pay for it. If there was a concerted effort, I think I'd pay - happily."

Male (40+), UK

PROPORTION THAT HAVE AN ONGOING ONLINE NEWS SUBSCRIPTION – SELECTED COUNTRIES



Q7ai. You said you have accessed paid for ONLINE news content in the last year... Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? Please select all that apply. *Base: Total sample in each country.*

On the other hand there was no consensus on the best way of charging. Subscriptions worked for some, but not for all, particularly those who'd got used to moving freely from one site to another.

"I like to get news from all different sources, so if I'm going to pay for one, that's frustrating to me."

Female (24-35), USA

While subscription is picking up in the US, in Southern and Central European countries like Greece, Italy, and Spain most online content remains free as there isn't the subscription culture to build on. Significantly, there is also less disposable income and less willingness to pay for online media in general. Users in Greece are ten times less likely to pay for a music subscription like Spotify than those in Sweden (3% compared with 32%). Users in Hungary are seven times less likely to pay for an online TV subscription like Netflix or Amazon Prime than those in Norway (5% compared with 35%).

Meanwhile in many Asian countries there has been less of an immediate business incentive to pursue digital subscription aggressively. In Japan, print remains extraordinarily lucrative, while in South Korea newspaper groups depend heavily on government advertising as well as payment for content they supply to portals Naver and Daum. In markets like Hong Kong, banner advertising still commands comparatively high premiums and supports the employment of large numbers of journalists at publications like Apple Daily.

Simply put, there is no one size fits all model that is likely to work everywhere. It is much harder to make a news subscription work in some countries than others. Other business models, such as advertising, donations, and syndicated content, will remain a critical part of the mix for many years to come.

Read more analysis on the reasons for paying and not paying for news, section 3.1, p. 34.

AD-BLOCKING ON HOLD

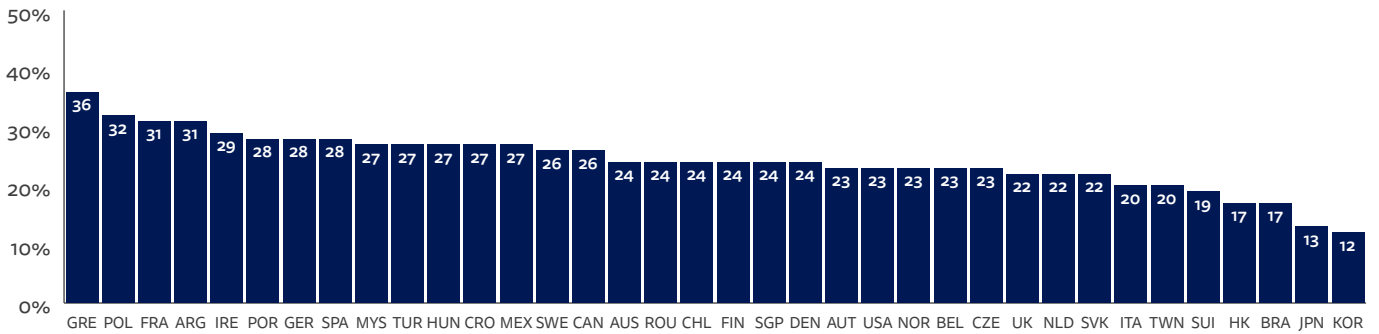
One threat to the news industry seems a little less pressing. Our data show that there has been no significant increase in ad-blocking over the last year.

Around a quarter (24%) continue to use software that magically removes all advertisements. The figure is highest in Greece (36%) and Poland (32%) and lowest in Japan (13%) and South Korea (12%). Crucially, despite industry fears, it has not spread to the smartphone where only less than one in ten (7%) have worked out how to install blockers or browsers that block by default.

The threat has not gone away. In focus groups, those who were not aware of them expressed strong interest in using them, but for the moment usage is largely confined to the desktop. Younger groups are also almost twice as likely to use them.

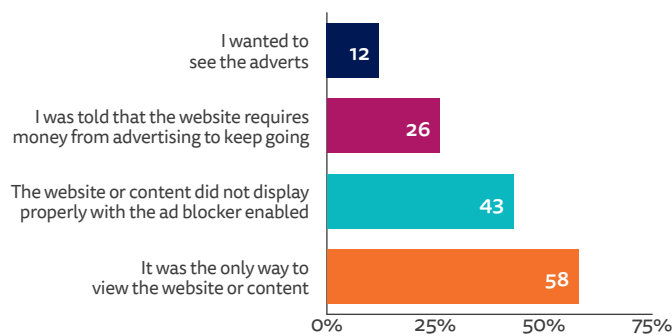
Another hopeful sign has been the increasing proportion of respondents (43%) who have agreed to temporarily turn off their ad-blocker for particular news sites. Publishers have been experimenting with different approaches, ranging from messages that 'ask nicely', to offering ad-free subscription alternatives, and blocking content completely. The tough love approach seems to have worked best with over half of those who had whitelisted a site (58%) saying they did it because it was the only way they could see the content. A quarter (26%) responded to messages explaining that sites need advertising to survive.

PROPORTION THAT ARE CURRENTLY USING AN AD-BLOCKER – ALL MARKETS



QAD4. On which, if any, of the following personal devices do you CURRENTLY use software that allows you to block adverts on the internet? Base: Total sample in each market.

REASONS FOR TURNING OFF AD-BLOCKERS – ALL MARKETS



43% have temporarily disabled their ad-blocker specifically for news



Opt_QAD5i. You said that you have turned off your ad-blocker temporarily ... Why did you do this? Please select all that apply. Base: All who have ever disabled their ad-blocker. All markets = 11,513. Note: This question was not asked in Ireland and Australia.

"It depends on the source I'm looking into. If it's a reliable source I usually remove it and take the advertising, and then I put it back on, it's like a wall that doesn't let that mass advertising in."
Focus group (35-54), Spain

"On some websites I don't use it if I think the website deserves the ad income ... I don't use them on special interest pages where I know they need the money."
Focus group (35-54), Finland

CONCLUSION

Journalism is being hit by forces that have been building for some time but the past year has seen this story break out from its media bubble to attract the attention of policy makers, politicians, and even the wider public. The news itself has become the news.

The abundance of content on the internet combined with new forms of distribution have contributed to a crisis of confidence in journalism where it is hard to distinguish verified facts from untruths, 'alternative facts', or information that is laced with extreme agendas. At the same time, the production of undifferentiated news, often with clickbait-y headlines, is now being exposed by social distribution where consumers are less aware of the original sources and don't go out of their way to choose a specific news brand.

As a result we are reaching a crisis point where the pressure is building on both media companies and platforms to come up with solutions. That's why we are seeing more news organisations refocusing on quality, unique journalism that people would be prepared to pay for,¹⁰ as well as ways to demonstrate the transparency, fairness, and accountability of their journalism (fact-checking, reader editors, etc.). And there is also a new focus on audience engagement, on driving 'quality reach' rather than just big numbers, and on building habit through email and mobile notifications. But these are not universal trends. In Asia, Latin America, and Southern Europe the focus on advertising income continues, while the willingness (or ability) of readers to pay directly is more limited.

From the platform perspective, there is an increased recognition that algorithms are rarely neutral, nor can they deal with the nuances and complexities of our modern world. As regulators and legislators circle in the wings, Google and Facebook are responding in various ways including – in the news area – through partnerships with independent fact-checkers and the testing of new algorithms that attempt to break people out of their bubbles.¹¹ They know too that their long-term business depends on building far higher levels of trust than our survey demonstrates people currently have in social media in particular.

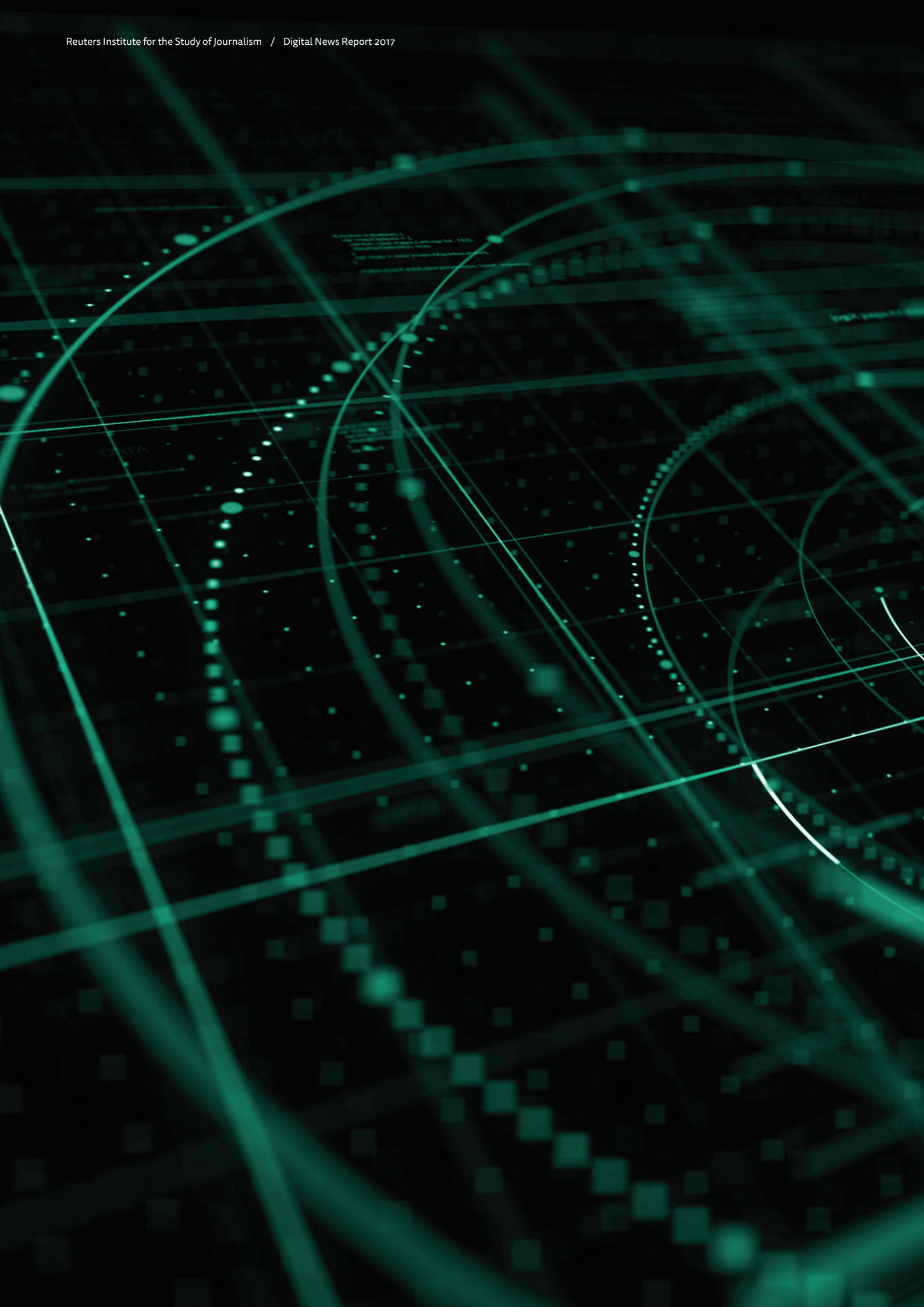
And then, even if those issues are resolved, the business questions remain. How can news organisations create enough value to persuade people to pay? Through cooperation and partnership can they create enough scale to compete with Google and Facebook in the advertising market, or at least within specific niches? What mix of models can bring in enough money to sustain quality journalism? Can the market provide all the solutions or might public subsidy be required, and if so with what implications for independence in an increasingly polarised political environment?

This year's survey does at least include some more optimistic signs; the emergence of donations and other evidence of public support for journalism should encourage non-profits. The uptick in subscriptions in the United States is helpful, but is unlikely to be enough on its own. Ad-blockers may be in abeyance but the problem of getting display advertising to work on a mobile screen is yet to be solved. In parts of the world, membership models are emerging as just one of a number of potential new revenue sources while our country pages across 36 countries showcase more innovation around business models, distribution, and formats than we've seen for some time.

The crisis over fake news could be the best thing that has happened to journalism – or the worst. It is certainly focusing minds and wallets. Next year's chapter in this on-going story will be fascinating to watch.

¹⁰ Mark Thompson, CEO, *New York Times*: 'We want every story we report, every column of opinion we publish, to be worth paying for.' <https://www.theguardian.com/commentisfree/2016/dec/16/fake-news-journalism-digital>

¹¹ BuzzFeed, Facebook's Charm Offensive: <https://www.buzzfeed.com/craigsilverman/facebook-charm-offensive>



Section 2

Viewpoint:

We broke the news media,
how can we fix them?

Melissa Bell

Publisher and co-founder, Vox Media

Viewpoint: We broke the news media, how can we fix them?

Melissa Bell

Publisher and co-founder, Vox Media



Let me paint a picture of an industry squeezed from all sides:

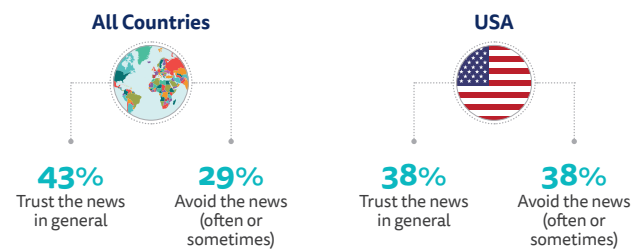
- When the President of the United States does not like a story about his work, he calls it fake news.
- When the average 18-year-old checks her phone, sometimes up to 200 times a day, she is bombarded by videos and ads and stories from uncertain sources, with little to guide her on how to distinguish between quality and trash, to tell truth from fiction.
- When the Interactive Advertising Bureau counted up all the online advertising dollars spent in 2016, 49% went to Google, 40% went to Facebook, and 'everyone else' split up the last 11%.
- When media organisations finally figured out how to bring their work to mobile websites, the web splintered into many multiples of media: Instant Articles and AMPs (Accelerated Mobile Pages) and Snapchat and VR headsets and Amazon Echoes, to name a few.

The media industry is stretched thin, anxious, and walking a razor's edge. And perhaps the biggest threat to our business is not an external pressure: we have a broken media industry because we have broken the confidence of our audience.

According to the 2017 Reuters Institute *Digital News Report*, less than half the population (43%) trust the media across all the 36 countries surveyed and almost a third (29%) actively avoids the news, rising to 38% in the United States. Instead of enriching their lives, our work depresses them. And underlying this loss of trust is a perception of media bias driven by polarisation. People cluster to media organisations that fit their belief, and dismiss other outlets. The internet, once thought to open the world up to all the information possible and bring people together, has instead drawn people into their own corners.

"We have a broken media industry because we have broken the confidence of our audience."

BROKEN NEWS?



Q6_2016_1. Please indicate your level of agreement with the following statements. – I think you can trust most news most of the time **Q1d1_2017.** Do you find yourself actively trying to avoid news these days? Base: Total sample: All countries = 71,805, USA = 2269.

How did we get here? News organisations moved too slowly to adapt. For too long, we used outmoded approaches built for the technologies of print and television, in a wholly new medium, the internet, and in so doing failed to address the problems facing audiences today.

What were some of those problems? A surfeit of information was one. Audiences had to contend with too much information, rather than not having enough. In the cacophony, they sought out voices they could trust, topics they admired. Rather than shifting towards developing relationships with audiences in a very real, committed way, the media tiptoed into community engagement.

Another issue: the media once had a monopoly on information and the means to distribute it, but that made us a bit too comfortable, sinking us into a sanctimonious belief that we were the truth holders instead of truth seekers. We used 'editorial judgement' as a code for 'what we think is important and think you should know'. Particularly in the US, this notion of objectivity allowed Roger Ailes to stroll right in and tell half the US audiences that his Fox News network would offer up 'fair and balanced' news, setting off a battle between news organisations over who had the more accurate facts.

It seems a pretty bleak picture, I know. But there are some small signs that there may be an answer to our problems in the problem itself: if we work to rebuild trust with our audiences, we may find our way to more stable, significant businesses. This *Report* has found that in the US, after the election, the news media gained five points from the prior year in terms of audience trust, at the same time that subscription rates climbed for the first time in years and major platforms – from Facebook to Twitter – sought to pay for quality work.

We started Vox three years ago, worried about how broken the news had become. We wanted to test ways to create a news product built for today's technology and sustained by today's business models. We haven't solved all the problems, but we have found loyal audiences looking to us for quality work across platforms. There's still work to be done, but we're finding the beginning of a path by asking ourselves these questions:

- What are we missing about audiences these days? And what are we not providing them?
- How do we make our content irresistible and essential to them?
- Journalists used to live next door to their sources and their audience. How do we recreate that sense of community when our audiences live across the country – or the world?
- How do we redefine civic duty in an era when the parameters of civic life are much narrower or much larger than we've ever known?
- No one likes to be told what to think. Most of us appreciate being invisibly guided to our own understanding and conclusions. How can we, then, help our audiences seek knowledge instead of simply publishing information?
- Now our audiences can see, in 360 degrees, the suffering in every corner of the world at any time, the emotional impact of an overwhelming, never-ending news cycle. What should we be building when we are all inundated with anxiety and uncertainty in streams of content every day?
- What happens if we face our biases and start to build news products that show our work and make our evidence part of the product?

This business has long been built on people who love the thrill of competition, whether it's an arms race of technology or sales deals or scoops. But the golden era has long since faded. We don't have enough resources to go around and the competition has grown beyond other media organisations. Instead of fighting over the same stories, we need to amplify each other's work, and then push to discover other stories. You're seeing that with partnerships forged around storytelling, such as the recent shared Pulitzer Prize between the *New York Daily News* and ProPublica¹² or the recent announcement of a content partnership deal between the *Guardian* and Vice.¹³

You see it happening in the technology and advertising space. At Vox Media, we've partnered with Condé Nast and NBC Universal to build a better approach to premium ad experiences. And you see it in platforms as well, such as with Google's open-sourced AMP project. What happens if we treat the lessons we're learning as a way to build each other up instead of tear each other down? Our audiences deserve – and the speed of change demands – this type of cooperation, not competition.

“We have to constantly challenge ourselves to build something that solves a problem for our audience.”

Finally, we have to be seized by a sense of purpose. We have to know who we are and what we are trying to do, so our audience can come to know us and what to expect from us. We have to constantly challenge ourselves to build something that solves a problem for our audience. This is a choice we all make: you can try to scale by creating a shallow product that reaches everyone, or you can try to scale by creating different unique products that deeply matter to loyal audiences.

This work is too important to move slowly. We need to find the answers to these questions, to go deep, to matter, to make a difference every single day. Our audience's trust, and our businesses, depend on it.

¹² <https://www.nytimes.com/2017/04/10/business/media/pulitzer-prizes-2017.html>

¹³ <https://www.theguardian.com/media/2016/dec/08/guardian-announces-partnership-with-vice>



Section 3

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3.1 Paying for news

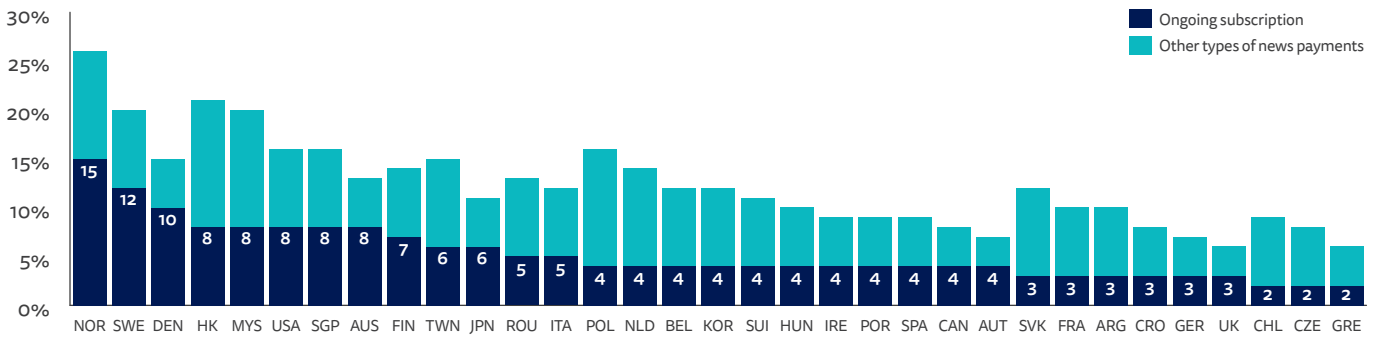
Richard Fletcher

In this section we will analyse the growth in paying for online news that we see in some countries, and examine some of the reasons why people pay (and why most don't). For the first time we are able to contextualise our figures for paying for online news with comparable figures for digital audio and video. To complement our survey data we carried out a series of eight focus groups across four countries (UK, USA, Spain, and Finland) on the topic of paying for news. We will refer to some of the findings from these throughout this section.

We start with the headline figures for paying for online news. Here, we place the focus on people who say they have made an 'ongoing payment (subscription) for a digital news service' in the last year, as these are often the most lucrative for publishers. Payment figures tend to be higher in Nordic countries like Denmark (10%), Sweden (12%), and Norway (15%). However, they fall to just 2% in Greece and the Czech Republic. Similarly, just 3% in the UK paid for an ongoing news subscription in the last year.

The brighter shading on the column chart below indicates other types of payment for online news, including one-off purchases for single editions, print/digital bundles, and donations. We can see at a glance that these are more common than ongoing payments in some markets.

PROPORTION THAT PAID FOR ONLINE NEWS IN THE LAST YEAR – ALL MARKETS*



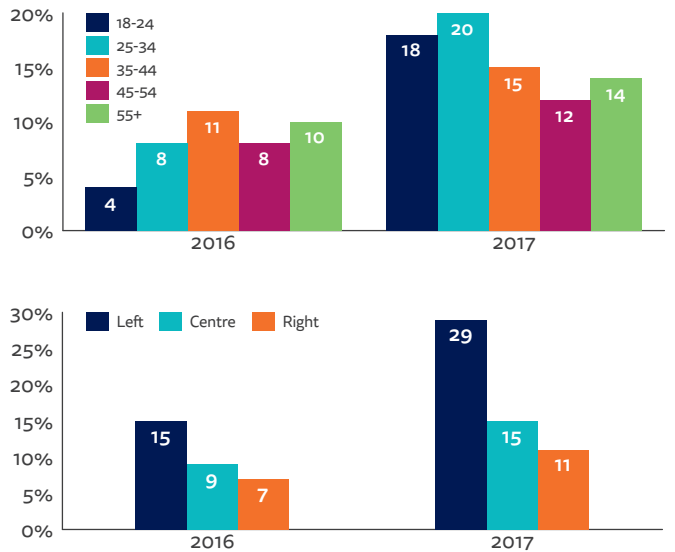
Q7a. You said you have accessed paid for ONLINE news content in the last year... Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? Please select all that apply. Base: Total sample in each country.

*Urban samples Turkey, Brazil and Mexico excluded for fair comparison.

Thinking about all types of payment for online news over time, we find that in most of the countries we have been tracking for several years there has been little significant change in the top-level figures. The clear exception to this rule is the USA, where the figure has leapt from 9% in 2016 to 16% in 2017.

One thing that has been unclear until now is where this increase has come from. Who is paying now that wasn't one year ago? There is evidence of growth from two sections of society: younger people and those on the political left. As shown in the chart opposite, we see some growth across all age groups, but particularly from the under 35s. In the USA, the proportion of people aged 18–24 paying for online news rose from 4% in 2016 to 18% in 2017. We see the same pattern by political leaning; some growth within all groups, but particularly from those on the left. It is too early to know whether these increases constitute a groundswell, or simply a knee-jerk reaction to a political shock.

PAYING FOR ONLINE NEWS BY AGE AND POLITICAL LEANING – USA



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? Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription or one off payment for an article on app or e-edition) Base: 18-24/25-34/35-44/45-54/55+ Left/Centre/Right: USA = 180/399/402/395/893 530/919/533.

We also asked those who are currently paying for the most important reasons behind their decision. Interestingly, the USA (29%) had the highest proportion saying that they wanted to fund journalism out of all 36 markets studied. A quarter (25%) said the same in Australia. Here, we have seen donations to news organisations jump from 1% in both countries in 2016, to 3% in Australia, and 4% in the USA in the space of a year (amongst the whole population). But this pattern is not repeated elsewhere. If we look across all 36 markets, just 13% said they paid because they wanted to fund journalism.

In our focus groups, people expressed reservations about the idea of donating money to commercial entities, and were often unclear on why they were being asked to do so. This is linked to a perfectly justifiable lack of understanding about the state of the news business. It is not obvious to outsiders, for example, why publishers give content away for free at a time when they are losing money, or why digital advertising should be worth so much less than print advertising. When the situation was explained in focus group discussions, it was often met with surprise, followed by sympathy and concern, but also an undeniable sense of Schadenfreude amongst those who have lost trust.

“I never really thought they were losing funding ... I thought so many were accessing the news online that they make so much money from advertising.”

20–34, UK

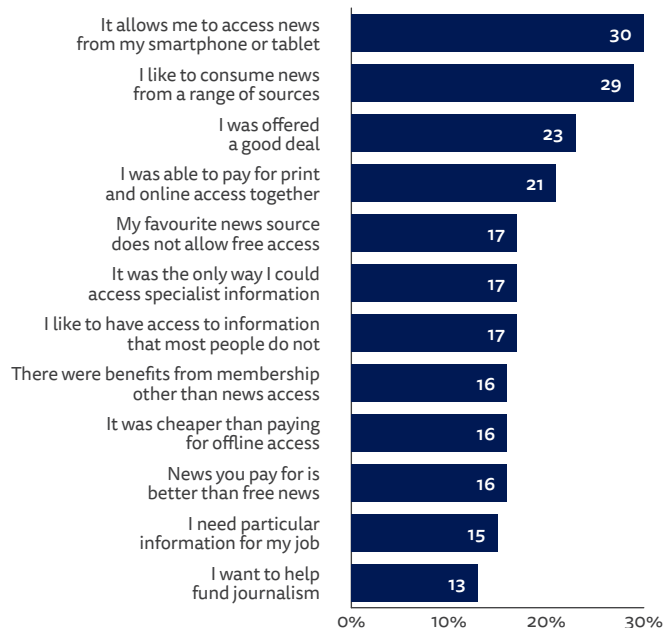
“They’re a train wreck ... the bickering, the fighting, the name calling ... they’re just so biased on both sides, it just gets annoying.”

35–54, USA

In almost all countries, the most commonly cited reasons for paying are to get access on mobile devices, because of a good deal or print/digital bundle, or because people like to consume news from a range of sources that includes paid-for providers. However, there are variations in the reasons for paying between markets. Mobile access is more important in many of the smartphone-first markets, such as Sweden, Hong Kong, and Singapore. Whereas in Norway, Belgium, and the Netherlands, print/digital bundles have persuaded a significant number of people to pay.

Interestingly, when asked about the type of content that had most influenced their decision to pay, across all 36 markets breaking news (41%) and reporting on recent events (38%) come out top. In-depth analysis (34%) and commentary (29%), which tend to be distinct to the news source, are next on the list. Comparatively few people (23%) pay for access to entertaining or amusing news content. The importance of breaking news is perhaps surprising, given that in most countries people can get the same breaking news from a number of free alternatives. This reasoning has motivated some publishers (such as *The Times* of London) to stop providing breaking news to their paying customers. This makes sense for publishers, and whilst there was some recognition from our focus groups that social media often does breaking news better, it may ultimately be hard to explain this to paying customers who expect to get the full package.

REASONS FOR PAYING FOR ONLINE NEWS – ALL MARKETS



Q7aii. You said that you have paid for online news in the last year... What are the most important reasons for this? Please select all that apply. Base: All who paid for online news in the last year. All markets = 9434.

“If I am paying for it I would rather be the first to know.”

20–34, USA

In our survey we focused on different types of coverage, but the focus groups allowed for other factors to emerge. People valued quality content, in particular good writers, exclusives, and behind-the-scenes access. Additionally, people stressed the importance of mobile apps that are customisable, easy to use, and can integrate multiple devices.

“It should feel useful, news that I can’t get anywhere else, a well thought-out and well written piece, not just something that’s thrown together and put on the internet.”

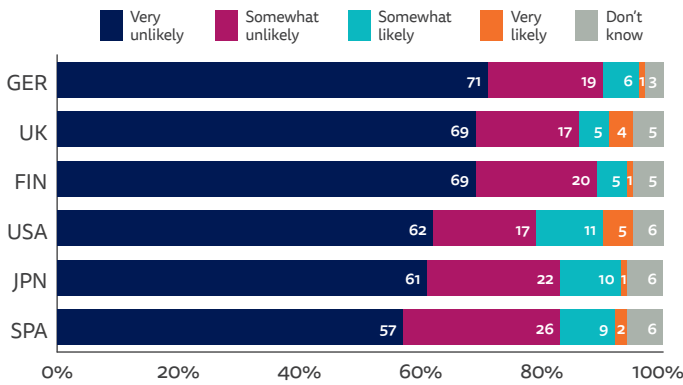
20–34, Finland

“Some people are more engaging, I find. Personally, that’s why I pay for the New York Times.”

20–34, USA

We should always keep in mind that most people still do not pay for online news. The first two bars from the left in the next chart represent those who are either very unlikely, or somewhat unlikely, to pay for online news in the future. However, we can see that the 'Trump bump' is mirrored in the figures for willingness to pay, so it is possible that we could see further growth in the USA in 2018.

LIKELIHOOD OF PAYING FOR ONLINE NEWS IN THE FUTURE – SELECTED COUNTRIES



Q7aiv_rc. You said you have not paid for online digital content in the last year... How likely or unlikely would you be to pay in the next 12 months for online news from particular sources that you like? Base: All who did not pay for online news in the last year: Spain = 1784, Japan = 1688, USA = 1816, Finland = 1665, UK = 1965, Germany = 1826.

We also asked these same people why they do not currently pay for online news. Across all markets, over half said that this is because so much online news is freely available (54%). This was also the most noticeable sentiment from our focus group participants. This does not necessarily mean, however, that individual brands (such as the public service broadcaster) should be held entirely responsible. Previous research using our 2015 data from six countries showed that consuming news from the public service broadcaster had no negative effect on individual willingness to pay.¹⁴

“There is so much accessible for free that if you don’t find it on one site you find it on another.”

20–34, Spain

“For me, with news, I don’t feel like I’m missing anything by not paying for it.”

20–34, UK

Much of the discussion around paying for online news assumes that people’s reasons for not paying all revolve around news in some way. Many of them do, but in some cases people are reluctant to pay for reasons that are more general. Around one in five (18%) say they don’t pay because they can’t afford it, and one in ten (11%) say that they don’t like using their bank details online. Around 6% worry that it might be difficult to cancel an ongoing payment, or that making the payment in the first place will simply be too much hassle.

These reasons were most commonly given in Mexico (46%), Greece (45%), and Turkey (45%), where nearly half of those not paying say it is at least partly related to factors not specific to news. For others, the money they have already spent on hardware, software, and getting connected creates the feeling that they have paid already.

“You have got to pay for it.”

“I have my limits; I can’t afford that.”

“They have got to pay their salaries.”

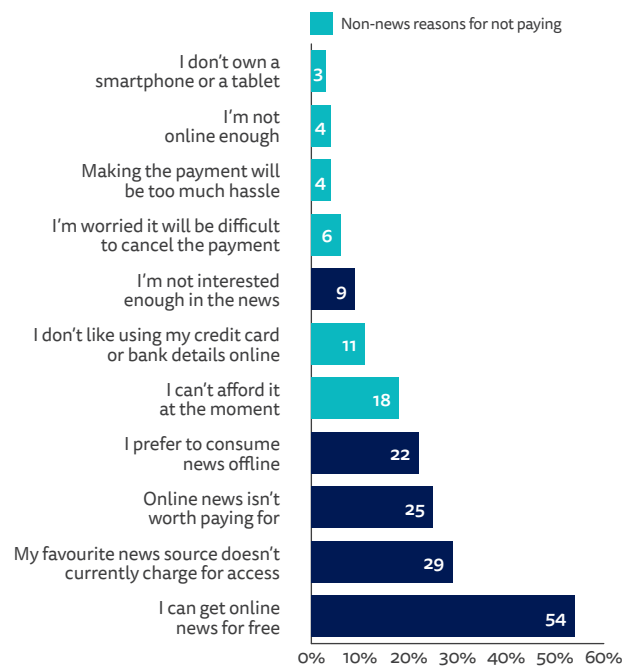
“I know. I understand that, but I have got to pay my rent.”

20–34, USA

“It’s like, God, I’ve spent a thousand dollars on electronic devices, can you please give me something for free?”

35–54, USA

REASONS FOR NOT PAYING FOR ONLINE NEWS – ALL MARKETS



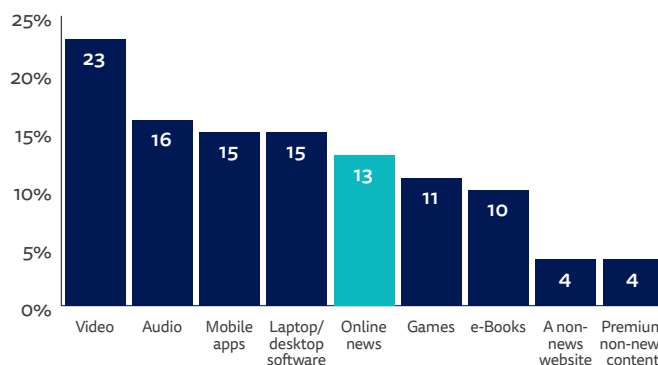
Q7avi. You said that you have not paid for online news in the last year...What are the most important reasons for this? Please select all that apply. Base: All who did not pay for online news in the last year: All markets = 60,029

¹⁴ Richard Fletcher and Rasmus Kleis Nielsen, Paying for Online News: A Comparative Analysis of Six Countries. *Digital Journalism* 0(0) (2016).

This year for the first time we place paying for online news in the broader context of paying for online media more generally, particularly music and video. In short, people are more likely to pay for access to online video (e.g. via Netflix) and digital audio (e.g. via Spotify and iTunes) than they are to pay for online news (see chart right).

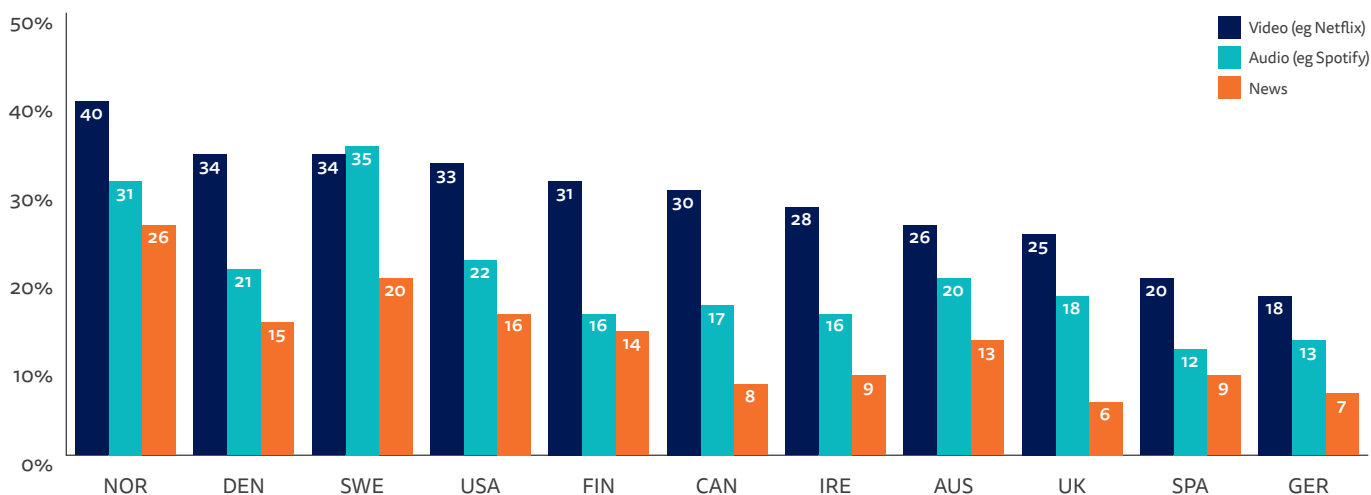
However, these averages for all 36 markets obscure the much larger differences we see in English-speaking countries, Nordic countries, and Western Europe, where online music and video services like Spotify and Netflix have a stronger foothold. Here, digital audio and video services tend to be much further ahead. In Eastern Europe and Asia, the gap is smaller, but only because online audio and video are less popular.

PROPORTION THAT PAID FOR OTHER FORMS OF ONLINE MEDIA IN THE LAST YEAR – ALL MARKETS



Q7b_2017. Thinking more generally, which of the following types of digital media (if any) have you paid for online in the last year? Base: Total sample = All markets = 71,805.

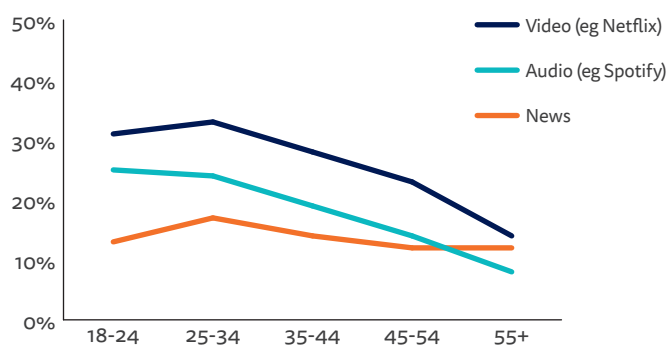
PROPORTION THAT PAID FOR ONLINE DIGITAL VIDEO, AUDIO, AND NEWS IN THE LAST YEAR – SELECTED COUNTRIES



Q7b_2017. Thinking more generally, which of the following types of digital media (if any) have you paid for online in the last year? Base: Total sample in each country.

The figures for paying for audio and video are skewed towards younger people. The figures for paying for online news are much flatter. This is a powerful corrective to idea that young people are not prepared to pay for online media. Even when it comes to news, younger people are no less likely to be paying than older people. Rather, news publishers have not been quite as successful as other media companies in convincing younger people to part with their money.

PROPORTION THAT PAID FOR ONLINE DIGITAL VIDEO, AUDIO, AND NEWS IN THE LAST YEAR BY AGE – ALL MARKETS



Q7b_2017. Thinking more generally, which of the following types of digital media (if any) have you paid for online in the last year? Base: 18-24/25-34/35-44/44-55/55+. All markets = 7791/12,711/13,288/12,888/24,927.

We asked our focus groups why they are more willing to pay for digital audio and video. People felt that they simply offer a different experience to news; one that is entertaining, relaxing, or enjoyable. Also, there was a recognition that (unlike news) the content retains its value over time, and isn't accompanied by a sense of waste if not used every day. Moreover, there was a clearer sense that the companies that provide this service offer something both valuable and unique, and are associated with innovative approaches and new ideas. Crucially, the focus groups also identified that many of these services are built on aggregating content from multiple sources.

Viewed in this way, asking people to pay for online news from a single provider could feel strikingly old-fashioned and out of sync with the experience of multiplicity and choice that people have come to expect from the web.

[Q:] Subscriptions, subscribing to news?

[A:] To only one media outlet, no.

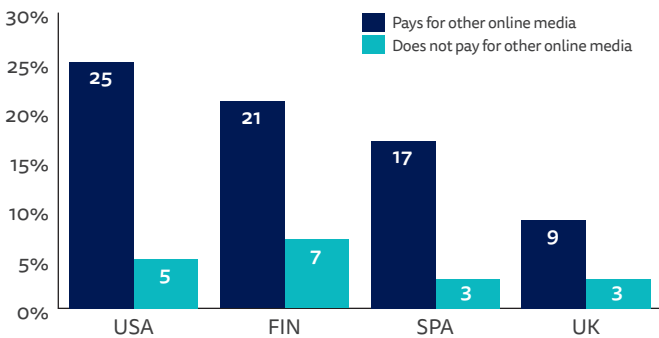
25-34, Spain

"What you could do is ... if you want the politics subscription you can pay £5 a month and you can have all the politics you can read, or the science subscription ... like Now TV has got the entertainment bundle."

25-34, UK

Despite the differences, people who pay for other media online (such as audio and video) are either much more likely to be paying for online news already, or are much more willing to pay in the future. The link is particularly strong in Spain and the USA, where people are five times more likely to be paying for online news if they are paying for other things (when compared to people who have not purchased any online media in the past year). Importantly, this association is present in all of the 36 markets examined, and remains even after controlling for age, gender, education, and interest in news.

PAYING FOR NEWS MORE COMMON AMONGST PEOPLE WHO PAY FOR DIGITAL AUDIO, VIDEO, AND OTHER ONLINE MEDIA - SELECTED COUNTRIES



Q7b_2017. Which of the following types of digital media (if any) have you paid for online in the last year? **Q7a.** Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription or one off payment for an article or app or e-edition) Base: Does not/pays for other online media: USA = 1034/1226, Finland = 1004/1003, Spain = 1125/881, UK = 1168/944

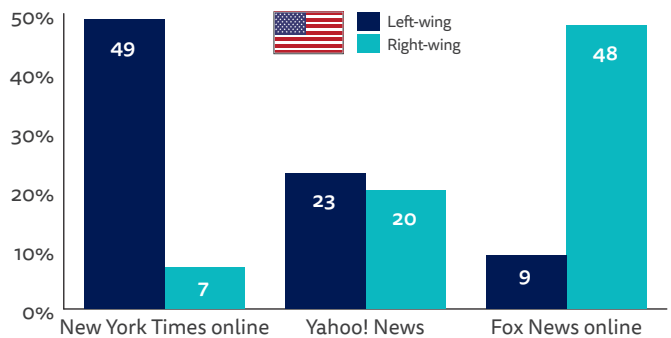
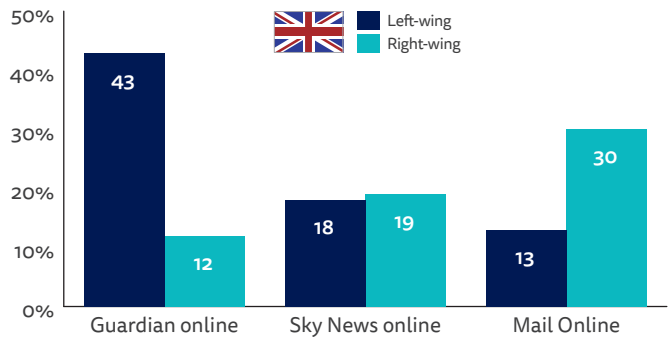
3.2 Polarisation in the news media

Richard Fletcher

We now have some preliminary evidence to suggest that polarisation is increasing in some countries, but also that there is large national variation in the degree to which the audiences for the most popular news brands are polarised along the left-right spectrum. In this section we will take a more in-depth look at news media polarisation. We will explain how our measures are computed, before exploring some of the differences we see across countries.

In the UK, the audience for the *Guardian* is made up of far more people on the left than on the right, but the opposite is true of the Mail Online. Sky News online has around 20% from both camps. In the USA, we can similarly see that the online audience for the *New York Times* is left-leaning, but that for Fox News online is right-leaning. Yahoo, which aggregates news from a number of different sources as well as authoring its own content, is evenly split.

POLITICAL BREAKDOWN OF NEWS AUDIENCES FOR SELECTED BRANDS - UK AND USA



Q5b. Which of the following brands have you used to access news ONLINE in the last week? Please select all that apply. **Q1f.** Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? Base: All who used Guardian online/Sky News online/Mail Online/New York Times online/Yahoo! News/Fox News online in the last week: UK = 364/162/255, USA = 403/495/447. Note: Respondents who answered don't know to Q1f were excluded.

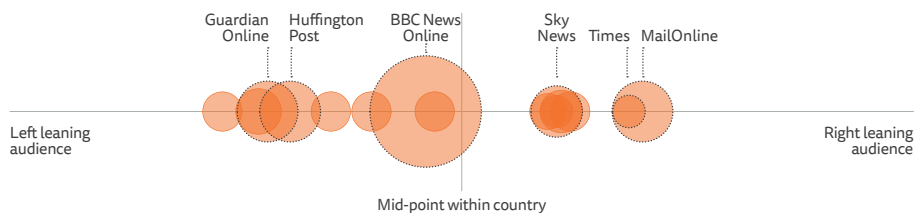
We can use the information about the political leaning of news audiences to generate a score for each brand. The score tells us how right-leaning or left-leaning audiences are when compared to the political views of the population as a whole. We can then map each of the most popular 15 brands within a market based on the extent to which they diverge from the centre (as defined by the population).

On the chart at the top right – which maps the most popular online news brands in the UK – we can see that the *Guardian* online, with its left-leaning audience, has a score which places it on the left-hand side, whereas the Mail Online is placed on the right. The size of the bubbles represents the weekly reach of the brand. With its weekly online news reach of 47%, BBC News online is the largest bubble on the map. It is close to the centre as defined by the average political leaning of the population as a whole, measured on a seven-point scale ranging from 'very left wing' to 'very right wing'.

We see a different pattern in the USA. Here, we can see at a glance that the furthest left and furthest right bubbles are further apart, which is one possible indication of polarisation. We can also see that all but two of the top 15 outlets have a left-leaning audience, with the audience for Fox much more right-leaning than any of the other leading brands.

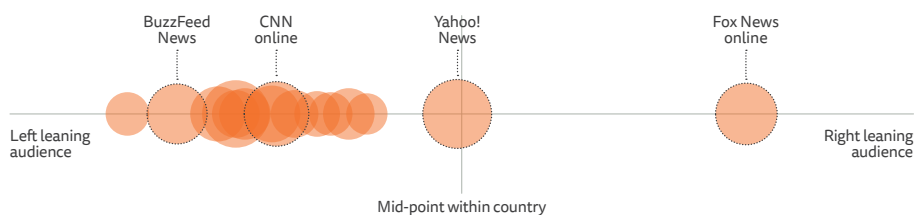
When we look at other countries we see a great diversity of patterns. Some, like in Netherlands, are more tightly clustered around the centre. The Nordic countries, in common with the UK, also tend to have a large bubble in the middle; often the public service broadcaster. Importantly, to make them comparable, the bubbles are positioned in terms of the level of dispersion we see in political leaning amongst the population as a whole. This means that in countries like Germany and the Netherlands news brands are not simply more centralised because the population happens to be centralised, and in the USA, news brands are not more polarised because the population is more polarised.

AUDIENCE MAP FOR THE TOP ONLINE NEWS BRANDS – UK*

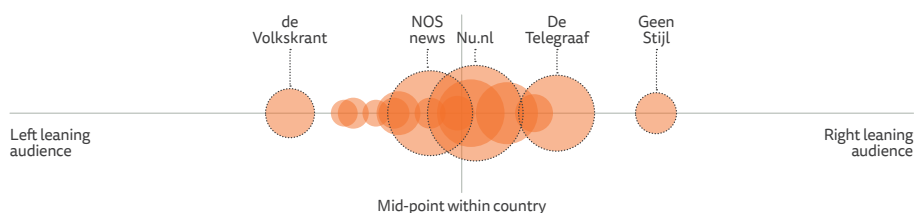


Q1f. Some people talk about 'left', 'right' and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q5b.** Which of the following brands have you used to access news ONLINE in the last week? Please select all that apply. Base: Total sample: UK = 2112. Note: Respondents who answered don't know to Q1f were excluded. * Questions and methodology for this and subsequent audience maps the same using total sample in each country

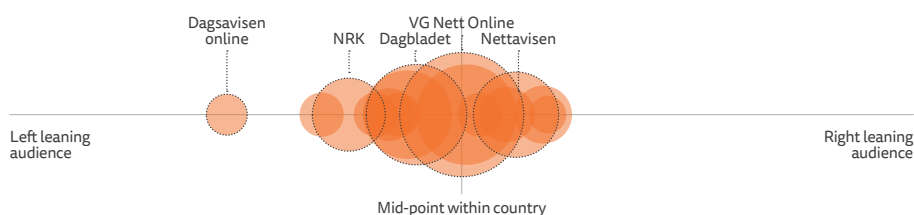
AUDIENCE MAP FOR THE TOP ONLINE NEWS BRANDS – USA



AUDIENCE MAP FOR THE TOP ONLINE NEWS BRANDS – NETHERLANDS



AUDIENCE MAP FOR THE TOP ONLINE NEWS BRANDS – NORWAY



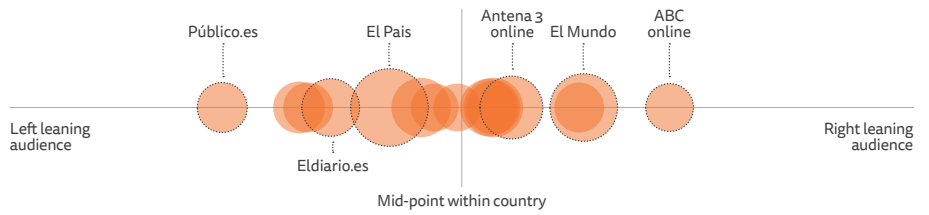
Other countries, like Spain and Italy, are more spread out. But even looking at these two countries, we notice differences. Spain is widely dispersed, with the most heavily skewed audiences also those with the smallest reach. But in Italy, two of the most widely used brands – *La Repubblica* online and *TgCom24* online – also have audiences that are either dominated by left-leaning or right-leaning users. Having popular brands with heavily skewed audiences might also be a possible indication of a polarised media environment.

We can use these data to produce comparable polarisation scores for each country. The scores take into account the level of dispersion of the bubbles, and weights this by their reach. If outlets with a larger reach are far from the centre, then this will produce a higher polarisation score than if they were in the middle.¹⁵ The bar chart opposite displays the polarisation scores for those countries where the left-right distinction is meaningful; our European countries, Australia, and the USA. In other countries, the left-right distinction is less important than other divisions. (Turkey, for example, is politically polarised between adherents of Islamism and supporters of Kemalism).

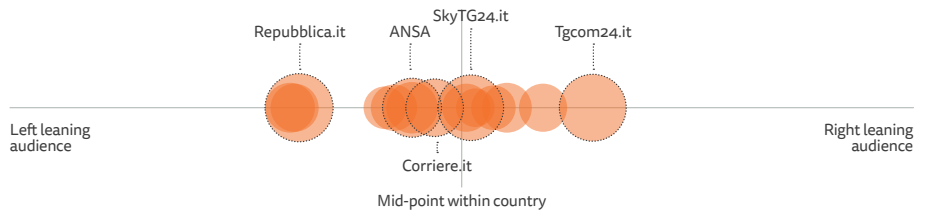
On this basis we estimate that polarisation amongst the most popular online news brands is highest in the USA. Italy, Spain, and Poland are next. Nordic and Western European countries such as Finland, Norway, Germany, and the Netherlands exhibit lower degrees of polarisation. Very broadly, this maps onto the typology of media systems identified by comparative media researchers, where Southern and Central European countries are more polarised, and Western European and Nordic countries less so.

It is likely that many different factors drive news polarisation online. In some countries, history and path dependence have created a situation whereby patterns associated with legacy media are transferred online. But there are also reasons to expect online patterns to be different because of the greater range of opinion and the way content is accessed. Digital-born brands are already reshaping the news ecosystem. Some of these, such as Breitbart, Occupy Democrats, and the Canary, focus on political news and are highly partisan.

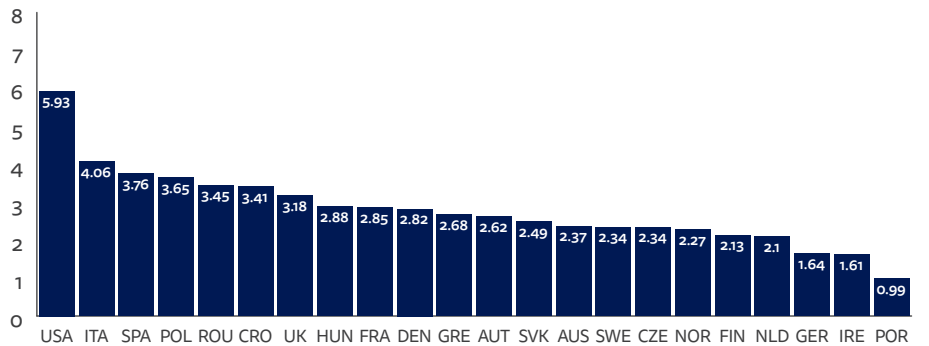
AUDIENCE MAP FOR THE TOP ONLINE NEWS BRANDS – SPAIN



AUDIENCE MAP FOR THE TOP ONLINE NEWS BRANDS – ITALY



ONLINE NEWS MEDIA POLARISATION SCORE – SELECTED COUNTRIES



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? **Q5b.** Which of the following brands have you used to access news ONLINE in the last week? Please select all that apply. Base: Total sample in each country. Note: Respondents who answered don’t know to Q1F were excluded.

Though still quite small (no more than 7% weekly reach in our survey) and usually limited to one market, comScore data reveal that they have been growing quite rapidly in the UK and the USA since 2014. Their rise is already likely to have contributed to the sense that media polarisation has increased in these countries, and if their growth continues, this will come to be reflected in our measures.

¹⁵ Online news media polarisation score for each country is the mean of the polarisation score for each of the top 15 online brands multiplied by their weekly reach.

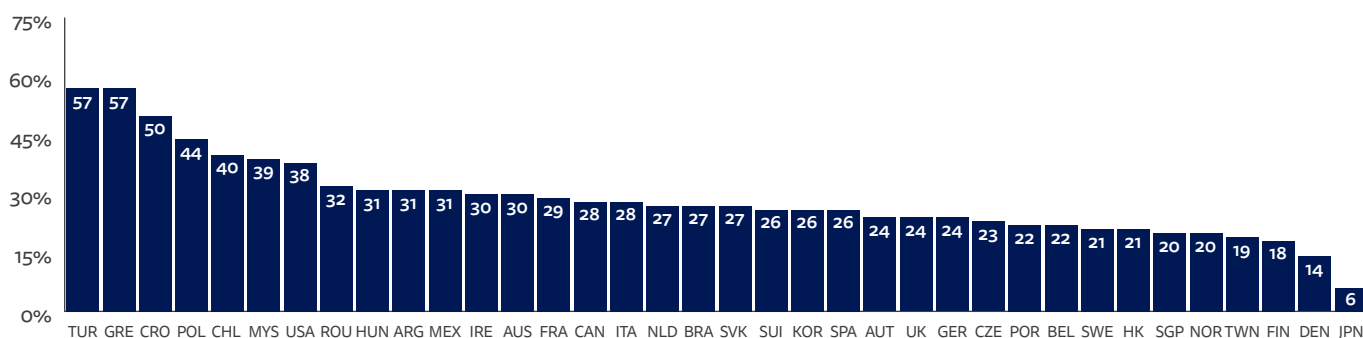
3.3 News avoidance

Antonios Kalogeropoulos

In this section we explore the extent to which people find themselves actively avoiding the news. We define this not as total avoidance of news, since our base sample is made up of those who say they use news at least once a month, but rather as those who say they avoid news often or sometimes. The issue of news avoidance is a matter of concern if it means that citizens are not sufficiently equipped to take decisions in elections or referendums. There are also concerns that the abundance of other types of media (e.g. entertainment) may be squeezing exposure to news for less interested news consumers.

On the country level we find considerable variation, with over half the respondents in Greece (57%) and Turkey (57%) avoiding the news, compared with fewer than one in ten in Japan (6%). Countries like Greece and Turkey are undergoing considerable economic and political turmoil, which may be a contributory factor to high levels of avoidance, but it is not easy to identify a clear pattern. On the other hand, we can observe that stable and prosperous Nordic countries tend to have much lower levels of news avoidance (ranging from 14% in Denmark to 20% in Norway).

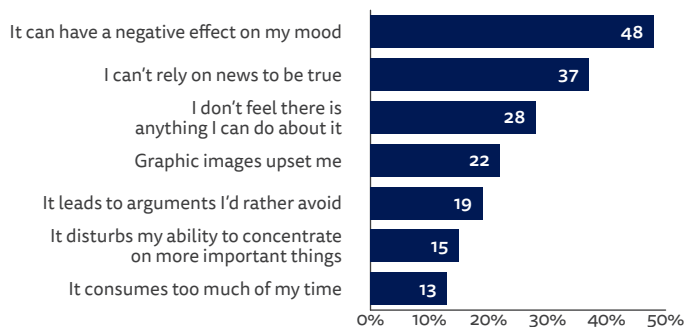
PROPORTION THAT SOMETIMES OR OFTEN AVOID THE NEWS – ALL MARKETS



Q1di_2017. Do you find yourself actively trying to avoid news these days? Base: Total sample in each market. Q1di_2017. Do you find yourself actively trying to avoid news these days? Base: Total sample in each country.

Around half of our all our respondents (48%) said they avoided news because it had a negative effect on their mood, while almost four in ten (37%) said they did because they feel they cannot rely on the news to be true.

REASONS BEHIND NEWS AVOIDANCE – ALL MARKETS



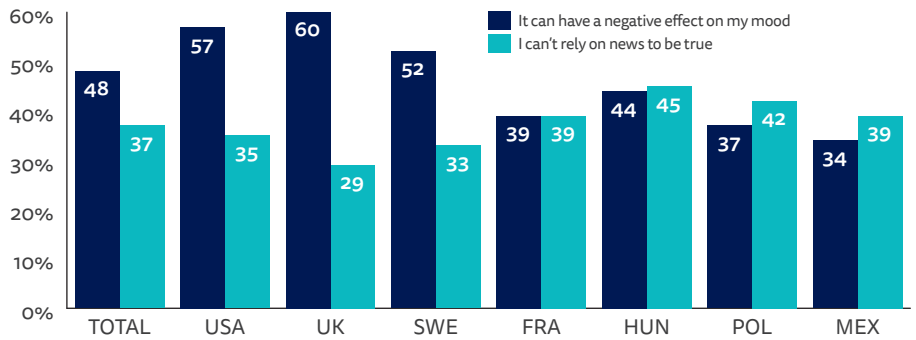
Q1di_2017. Do you find yourself actively trying to avoid news these days? Base: Total sample in each market. Q1di_2017. Do you find yourself actively trying to avoid news these days? Base: Total sample in each country.

While these two reasons are not mutually exclusive, it is interesting to compare them because they reflect two distinct types: avoidance stemming from the depressing nature of the content itself, and avoidance due to disapproval of the news media more broadly. In Poland, the unreliability (or bias) of news is the most important factor, while in the United States and the United Kingdom we see a much higher level of avoidance due to negative mood (57% and 60%). This may be because a significant proportion of the population in each country feels deeply disenchanting by the Trump victory and Brexit vote respectively.

Looking at political orientation in the US, we can see that the people on the left are more likely than people on the right to avoid news because it has a negative effect on their mood or because they feel that there is not anything they can do about it. However, people on the right in the US are more likely to avoid news because they find it not reliable: 62% of news avoiders on the right cited this as a reason, while only 18% of people on the left did so. This could be connected to the narrative that the mainstream media have a 'liberal agenda'.

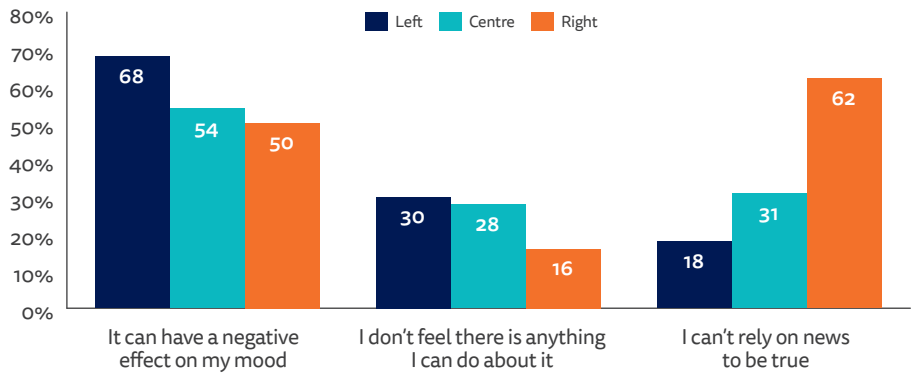
In terms of the demographics, we find that women are much more likely to avoid news than men in most countries. Age does not seem to be a significant factor, evidence that counters the prevailing narrative that young people are turning away from news.

REASONS BEHIND NEWS AVOIDANCE – ALL MARKETS



Q1dii_2017. You said that you find yourself trying to avoid news ... Which, if any, of the following are reasons why you actively try to avoid news? Base: All who often or sometimes avoid the news in each country.

REASONS BEHIND NEWS AVOIDANCE BY POLITICAL ORIENTATION – USA



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? Q1dii_2017. You said that you find yourself trying to avoid news ... Which, if any, of the following are reasons why you actively try to avoid news? Base: All on the left/centre/right who often or sometimes avoid the news in the USA.

3.4 Social media and incidental exposure

Richard Fletcher

How is the rise of social media changing news consumption? This is one of the most pressing questions concerning the media today. The growth of social media may be slowing down in some countries, but the influence of platforms – in particular Facebook and Google – has never been greater, as people worry about misinformation, polarisation, filter bubbles, echo chambers, and the erosion of the shared news agenda, to name just a few concerns.

In this section we shed some light on these issues by focusing on incidental exposure to news – situations where people end up consuming something while intending to do something else.

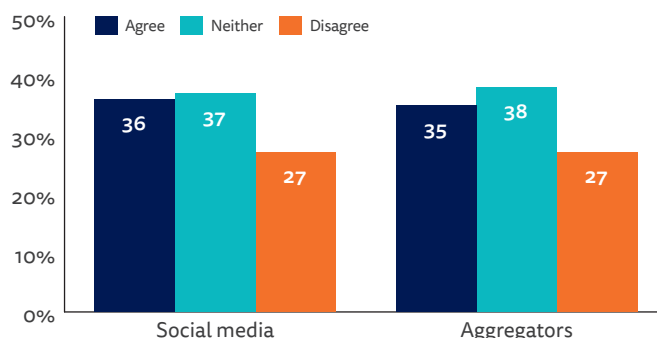
Many twentieth-century mass media environments were in part characterised by incidental exposure to news. People often read newspapers for their non-news content (e.g. reviews, recipes, and puzzles), and people carried on watching television news bulletins after their favourite entertainment programme had finished. But in high-choice media environments like the web, where people enjoy greater control over what they consume, some worry that there will be less incidental exposure leading to a situation where people most interested in news will be much better informed, but those with low interest will be left behind.

It is perhaps easy to forget that algorithmically driven services like search engines, aggregators, and social media have the potential to reintroduce incidental exposure to news, for the simple reason that they assume some responsibility for what we see online. We decided to see whether our respondents experience and recognise this. It appears that many do.

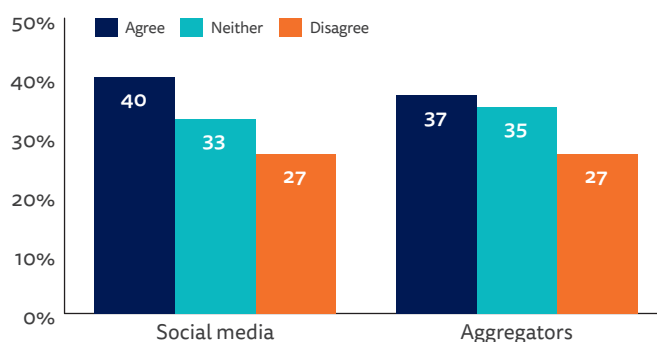
For users of both social media and news aggregators, more people agree that they often see news from sources they wouldn't normally use (36% and 35%) than disagree (27%). As a possible consequence of this, but also because these services have the potential to incidentally expose users to different topics as well as different news sources, more agree (40% and 37%) that they often see news stories that do not interest them than disagree (27%).

Another way of thinking about this is to compare users and non-users of these services in terms of how many online news brands they use. If people are incidentally exposed to news, we would expect them to end up using more news brands. And indeed when we count the number of brands, we find that on average social media users access more brands (4.34 per week) than non-users (3.10 per week). Likewise, those who use search engines for news, or news aggregators, use more online news brands than those who don't.

PROPORTION THAT AGREE THEY SEE NEWS FROM BRANDS THEY WOULD NOT NORMALLY USE – ALL MARKETS

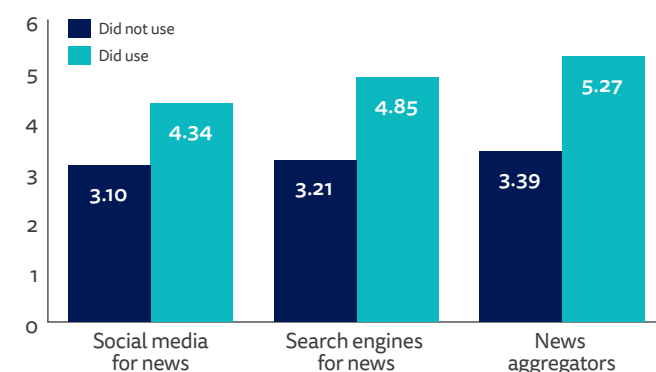


PROPORTION THAT AGREE THEY SEE NEWS STORIES THEY ARE NOT INTERESTED IN – ALL MARKETS



Q12Fi/iii_2017_1/2. Thinking about when you have used SOCIAL MEDIA FOR NEWS/NEWS AGGREGATORS ... Please indicate your level of agreement with the following statements. – I often see news from outlets that I would not normally use/I often see news stories that I am not interested in. *Base: All who used social media or news aggregators for news in the last week: All markets = 48,551/28,441.*

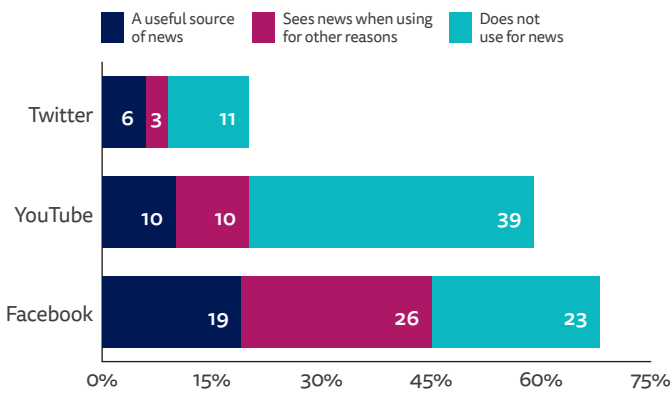
AVERAGE NUMBER OF ONLINE NEWS BRANDS USED IN THE LAST WEEK – ALL MARKETS



Q5B. Which of the following brands have you used to access news ONLINE in the last week? Please select all that apply. **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: Used/did not use social media for news/search engines for news/news aggregators in the last week: All markets = 28,557/43,238 16,893/54,902 7799/63,997.*

Of course, some people use these for news intentionally, so we can't say this is entirely down to incidental exposure. So, we asked users of Facebook, YouTube, and Twitter a series of follow-up questions that aimed to better understand how they use them. Of all respondents across all markets, 19% say they see Facebook as a useful source of news, 26% say they see news when using it for other reasons, and 23% say they use Facebook but don't generally come across news when using it. One in ten say they see YouTube as a useful source of news, but the majority of YouTube users don't see any news there. Just 6% say they intentionally use Twitter for news, and it is striking that the total Twitter user base (20% of respondents) is about the same size as the number of people who use Facebook as a news source (19%). This question is a repeat of one we asked in four countries (UK, USA, Italy, and Australia) in 2015. In each case the numbers have changed little in the last two years.

HOW PEOPLE USE DIFFERENT SOCIAL NETWORKS TO GET THE NEWS – ALL MARKETS

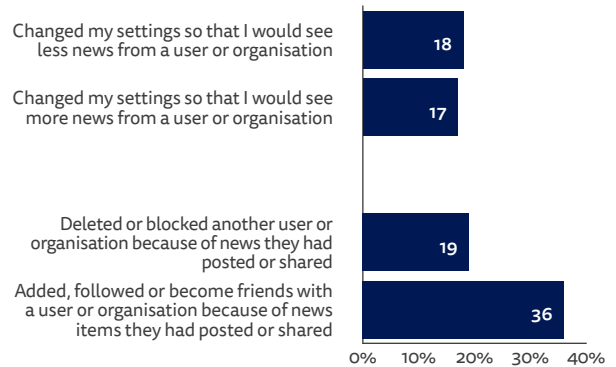


Q12C/Dii/OptQ12Fi. You say you use Facebook/YouTube/Twitter for news. Which of the following statements applies best to you? Base: Total sample: All markets = 71,805. Note: We did not ask about use of Twitter in South Korea.

We can think of those who say each is a useful source of news as 'news users' because they say they intentionally use each as a source of news. Those who use them primarily for other reasons have the potential to be incidentally exposed to news, but those who don't use them at all (non-users) do not. If we compare the average number of online news brands used by each of these groups, we can see that the incidentally exposed on each network use more online news brands on average than non-users. The incidentally exposed on Facebook consume news from around 20% more brands (compared to non-users), whereas the equivalent figure for YouTube and Twitter is around 50%. In other words, users of Facebook, YouTube, and Twitter see news from brands they would not otherwise use, regardless of whether they were intending to do so.

We shouldn't underestimate the consequences of self-selection. Even on social media, self-selection is an important consideration; one that is often absent from discussions. A significant number of people across all 36 markets say that they curate their social feeds based on the news content they want to see. Over a third (36%) have added a user for news, and around one in five have blocked someone because of news they posted. A similar number have also fine-tuned their feeds in order to see more or less news from a particular account.

PROPORTION OF USERS WHO CURATE THE NEWS ON THEIR SOCIAL FEEDS – ALL MARKETS



Q12D_2017. Thinking about when you have used SOCIAL MEDIA FOR NEWS ... Which of the following (if any) have you done in the last year on any social network? Please select all that apply Base: All who used a social network for news in the last week: 48,551.

3.5 Participation and online news

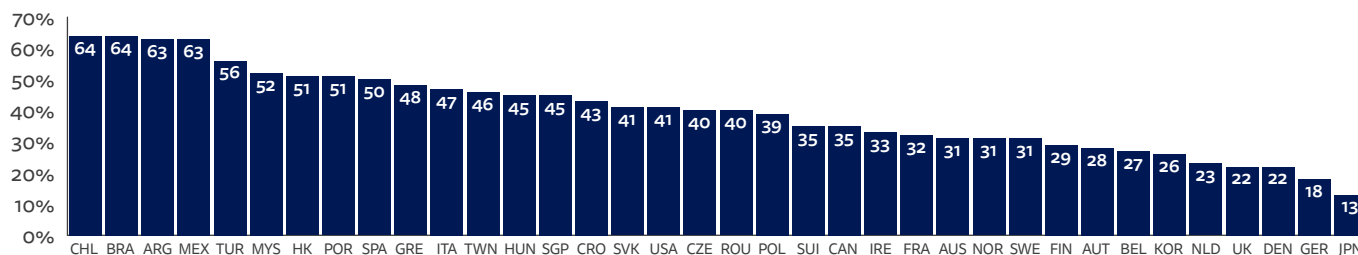
Antonis Kalogeropoulos

Digital media have opened up far more opportunities to interact with the news and to shape the news agenda directly through posting comments, pictures, and videos. At the same time, sharing of news between friends increasingly drives algorithms that decide the type of news that everyone sees in their feeds. Participation matters and not just for those who are directly involved. But how does participation work in practice? Who is doing it most and how has it changed over time?

The first thing to say is that participation varies greatly by country. The proportion that comment on news either on social networks or on the websites of news organisations is high in Latin American countries (44% in Mexico and Chile) and Southern European countries (34% in Greece, 29% in Portugal), while it is lower in some Northern European countries like Denmark (14%) and Germany (11%), as well as in Japan (8%).

It is a similar story when it comes to sharing. In Latin American countries, more than half of online users share news on a weekly basis (i.e. 64% in Chile and Brazil), while sharing is lowest in Germany (18%) and Japan (13%).

PROPORTION THAT SHARE NEWS WEEKLY – ALL MARKETS

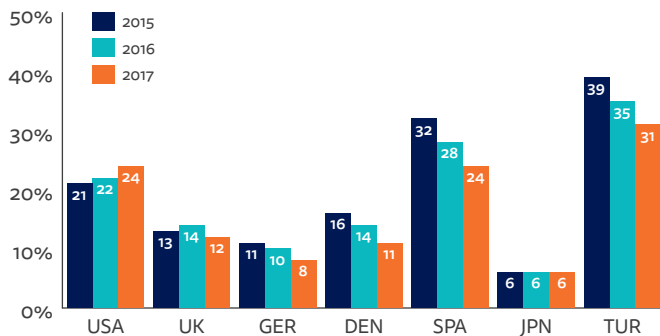


Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. Base: Total sample in each market.

Compared to previous years, both sharing and commenting on news in social networks has declined or been static in most markets over the last two years.

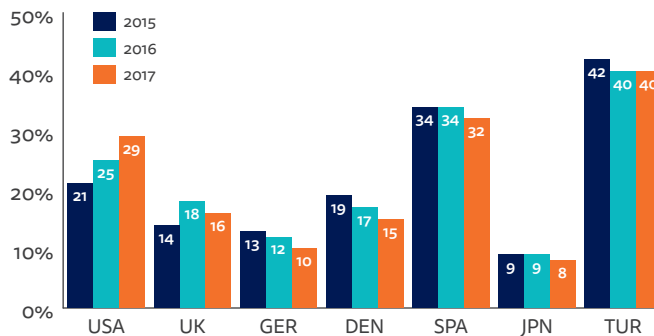
One exception comes in the politically charged United States, where commenting on social networks is 3% higher than in 2015, while sharing news on social networks is 8% higher.

COMMENTING ON NEWS ON SOCIAL MEDIA OVER TIME – SELECTED COUNTRIES



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 2015-2017 sample in each country

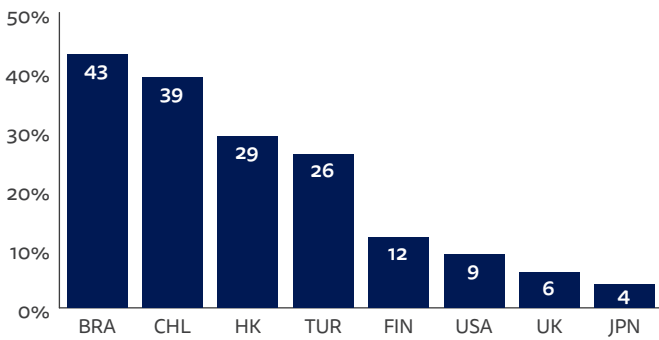
SHARING NEWS ON SOCIAL MEDIA OVER TIME – SELECTED COUNTRIES



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 2015-17 sample in each country.

The general decline in sharing is surprising given the amount of dramatic news across the world, but this could be related to the growth of messaging apps we have noted elsewhere in this report. For the first time, we have started tracking sharing through apps like WhatsApp and Facebook Messenger. This is most popular in countries like Brazil (43%), Chile (39%), and Hong Kong (29%), but less popular in the US (9%), UK (6%), and Japan (4%). This type of sharing also tends to be more private and more targeted; users tend to share a news story with one user or a group of users rather than with every Facebook friend or Twitter follower.

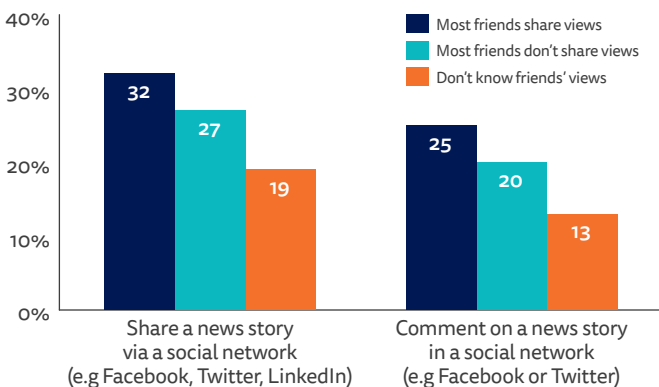
SHARING NEWS VIA INSTANT MESSAGING – SELECTED MARKETS



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 market.

We also found that people are almost twice as likely to share news or comment in social networks when their friends have similar political views, rather than when they do not hold similar political views or when they do not know their views. More sharing or commenting amongst people with whom we agree may make us feel good, but it may also encourage the kind of hyper-partisan polarisation we have referred to elsewhere in this report.

SHARING NEWS IS MORE COMMON WHEN PEOPLE KNOW THAT THEIR FRIENDS SHARE THEIR VIEWS – ALL MARKETS

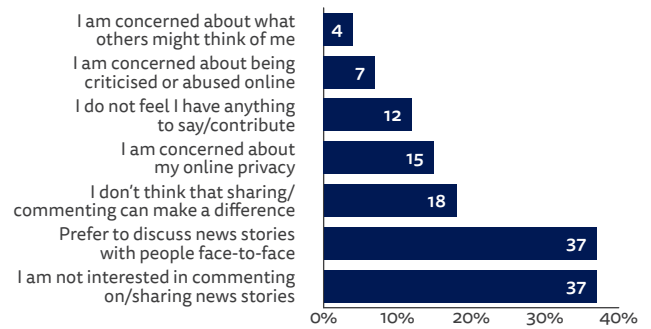


Q1Fi. Thinking about your views on politics, please select the statement that best applies to you. **Q13.** During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. Base: Total 2015-2017 sample in each country

REASONS FOR NOT SHARING OR COMMENTING

So far we have seen that only a minority of users share and comment on news in most countries. To understand why most people tend to abstain from sharing and commenting on news, we asked them to identify possible reasons why. When looking at overall findings, we find that the two most cited reasons are (a) lack of interest in commenting on news and sharing news (37%) and (b) a preference for face-to-face discussions (37%).

REASONS FOR NOT SHARING OR COMMENTING ON THE NEWS – ALL MARKETS



Q13ai. You said you do not share or comment on news stories... Why is that? Base: All who do not share or comment on the news: All markets = 38,027.

Privacy concerns were cited by 15% of respondents. However, this was more important for Taiwanese (24%), Brazilian (24%), and Singaporean (22%) respondents. Interestingly, despite the discussion revolving around trolls and abuse on Twitter and other social networks,¹⁶ only 7% of respondents said that they don't share or comment because they are concerned about being criticised or abused online. However, this number is higher for respondents in Turkey (17%) and Hong Kong (14%).

¹⁶ <http://time.com/4457110/internet-trolls>

3.6 Comparative brand analysis and new countries

This year our survey includes a number of new markets in Asia (Taiwan, Singapore, Malaysia, and Hong Kong to add to South Korea and Japan) and Latin America (Chile, Argentina, and Mexico to add to Brazil). Here regional experts explore the commonalities and differences that exist within and between markets.


LATIN AMERICA

RAMÓN SALAVERRÍA

University of Navarra, Spain

Similar to other regions, internet users in Latin America show low levels of trust in their media. There is a widespread feeling among online news consumers that the independence of the media is under pressure from both political and commercial interests. This feeling is especially notable in Argentina, where media tend to be politically polarised, but is less pronounced in Brazil – as evidenced by the gap between overall trust in the news and trust in the sources I use (see chart below).





TRUST IN THE NEWS – SELECTED LATIN AMERICAN COUNTRIES

	Trust in the news	Trust in the news I use	Free from political influence	Free from business influence
 Brazil	60%	60%	30%	30%
 Argentina	39%	52%	16%	16%
 Chile	47%	48%	17%	17%
 Mexico	49%	55%	19%	21%
All Countries	43%	49%	25%	25%

Q6 (series). Please indicate your level of agreement with the following statements: – I think I can trust most of the news most of the time/most of the news I consume/The media is free from undue political or government interest/undue business or commercial influence most of the time. Showing net agree code Base: Total sample in each country/all markets.

Mobile devices are particularly important for news consumption in Latin America. For many Latin American people, mainly those of lower income, having a home computer connected to the internet has been for years an almost unattainable luxury. Thanks to the growth of cheap mobile devices, many of these formerly disconnected people are now becoming intensive internet users for the first time. In 2017, three of the four Latin American countries studied in our report showed higher online news consumption rates through smartphones than computers. In Mexico and Chile that difference was especially significant: while the online news consumption through computers reached an average of roughly 50%, that level went up to more than 70% with smartphones.

PROPORTION USING SELECTED DEVICES FOR NEWS – SELECTED LATIN AMERICAN COUNTRIES

	Smartphone	Computer	Tablet
 Brazil	65%	62%	16%
 Argentina	62%	62%	17%
 Chile	74%	51%	18%
 Mexico	70%	45%	24%
All Countries	56%	58%	22%

Q8B. Which, if any, of the following devices have you used to access news in the last week?
Base: Total sample in each country/all markets.

This phenomenon also helps us to understand the high popularity of social media as a news source. While in 2017 the average use worldwide of social media as a source for news is 54%, in the four countries analysed in Latin America this percentage rises to nearly or even more than 70%. Chile (76%), Argentina (74%), and Mexico (72%) stand out worldwide as three of the countries where social media are by far the most important source of news access.

In terms of media brands, general content television channels are consistently the main offline source of news in all the countries, with newspapers and radio networks behind. On the internet, however, these positions change depending on the country: in Brazil, television channels' websites remain the main source for news; in Argentina and Chile the ranking is led by quality newspapers' websites; and finally, in Mexico, it is striking that the top source for online news is a digital-born medium (Aristegui Noticias). In none of the four countries analysed has the top offline news brand managed to maintain its leading position online. This suggests a significant shift in the preferences of news consumption between internet users and non-users in the region.

The leading online news brands in Latin America are consistently country-based media outlets. It's noteworthy that, with the exception of Terra, an internet portal of Spanish origin well established in the region since the late 1990s, the rest of the international news brands ranked in the top 20 in these countries are either US or UK based. Together with their good reputation, the pre-eminence of these English and American brands has been helped by their strategy of publishing online news in local languages, either Spanish or Portuguese.

ASIA

FRANCIS LEE

Chinese University of Hong Kong

There are significant internal variations among the six East Asian markets included in the study, which can be roughly separated into three groups. The first group is constituted by Japan and South Korea, where only about 20% of the respondents came across news stories via social media, and only 6–7% of people treated social media as the main source of news. In these countries, television remained much more likely to be the respondents' main source of news (around 45%). It should be noted that the online news arena in both countries is dominated by a major news aggregator – Yahoo in the case of Japan and Naver, the 'homegrown' web portal, in the case of South Korea.

The second group is made up of Taiwan and Hong Kong, where social media use is much higher. Around half of respondents had come across news stories via social media and about 16–18% treated social media as the main source of news. Despite this, television remains a key source of news for many, with 40% describing it as their main source.

The third group is constituted by Malaysia and Singapore. Similar to Taiwan and Hong Kong, more than 50% of the respondents in these two countries came across news stories via social media, and a relatively high percentage of respondents – 29% and 24% respectively – treated social media as the main news source. Significantly this is higher than the percentages treating television as the main news source.

MAIN SOURCE OF NEWS – SELECTED ASIAN MARKETS

	TV	Online News Sites	Social Media	Printed Newspapers
Japan	44%	29%	7%	14%
S. Korea	46%	40%	6%	4%
Taiwan	43%	31%	16%	4%
Hong Kong	41%	25%	18%	10%
Malaysia	23%	28%	29%	14%
Singapore	21%	29%	24%	19%
All Countries	40%	28%	14%	8%

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: Total sample in each country/all markets.

One thing to keep in mind when interpreting the figures from the region is the different political systems in place in the six markets. Japan, South Korea, and Taiwan are democratic systems, whereas Singapore and Malaysia are examples of competitive authoritarian states – elections exist but the various political institutions, the electoral system, the judiciary, and media, etc., are heavily skewed in favour of the existing power holders so that the political system at large lacks the substance of democracy. Hong Kong, meanwhile, is a Special Administrative Region under China and does not have a democratic system despite a 'tradition' of civil liberties. The differences in political systems have implications for degrees of press freedom in the countries, which in turn affect the development of online alternative media and thus the significance of the online arena as a space of the communication of news.

TRUST IN THE NEWS – SELECTED ASIAN MARKETS

	Trust in the news	Trust in the news I use	Free from political influence	Free from business influence
Japan	43%	44%	26%	25%
S. Korea	23%	27%	12%	12%
Taiwan	31%	36%	17%	17%
Hong Kong	42%	48%	23%	23%
Malaysia	29%	32%	16%	18%
Singapore	42%	46%	23%	29%
All Countries	43%	49%	25%	25%

Q6 (series). Please indicate your level of agreement with the following statements: – I think I can trust most of the news most of the time/most of the news I consume/The media is free from undue political or government interest/undue business or commercial influence most of the time. Showing net agree code Base: Total sample in each country/all markets.

Meanwhile, social and political integration in the East Asian region is not as strong as in Europe. There are also significant language differences among the six markets. These factors contribute to the absence of cross-cutting news brands in these Asian countries. It is fair to say that news remains essentially national in the region.

THE BATTLE FOR GLOBAL AUDIENCES

NIC NEWMAN

Reuters Institute for the Study of Journalism

Over the past few years a number of companies have looked to take advantage of near-free internet distribution to build global brands. The *New York Times* announced a major international expansion in English-speaking markets including Australia and has also launched a service in Spanish. By targeting affluent consumers of quality content across the world they hope, over time, to meet their ambitious target of 10m digital subscribers. The *Financial Times* and the *Wall Street Journal* are set on a similar (but more modest) paid content strategy, aimed at the more niche global business community. Other legacy media companies such as the BBC and CNN are looking to transition existing mainstream television and radio audiences to digital in English and other languages.

A second type of company focused on global growth is digital-born news organisations such as BuzzFeed News, the Huffington Post, and Vice News. These brands are funded mainly by advertising or increasingly from sponsored content, and through partnerships they also aim to reach non-English speakers across the world.

One other important global news player is Yahoo, the original web portal now trying to reinvent itself for the mobile and social age. The tie-in with email accounts and search means that Yahoo is still an important player in many markets including the United States, where surprisingly it remains the most used brand in terms of weekly reach. Yahoo Japan has a slightly different ownership and is more of an aggregator, but it dominates the market there on both web and mobile. Overall, Yahoo remains the brand with by far the highest reach across our 36 markets.

WEEKLY NEWS REACH OF SELECTED DIGITAL-BORN AND TRADITIONAL BRANDS – SELECTED MARKETS

Country	Huffington Post	BuzzFeed	Vice	CNN	BBC	New York Times	Yahoo
USA	24%	17%	4%	22%	12%	18%	25%
UK	14%	8%	2%	2%	47%	2%	6%
Ireland	10%	7%	2%	7%	16%	5%	12%
Canada	19%	11%	3%	15%	9%	7%	14%
Australia	11%	7%	3%	8%	11%	6%	17%
France	12%	4%	2%	2%	3%	2%	9%
Germany	7%	1%	1%	3%	3%	2%	6%
Japan	4%	2%	1%	4%	4%	1%	53%
Brazil	4%	7%	2%	11%	10%	8%	25%
Taiwan	1%	3%	1%	6%	5%	–	48%
Weighted average (36 countries*)	7%	4%	1%	5%	8%	3%	12%

Q5b. Which of the following brands have you used to access news online in the last week? Please select all that apply. Base: Total sample in each market.

*Weighted percentage calculated using population data from Internet World Stats and the World Bank: weighted = (country population x percentage adults x percentage accessed) / total population of all countries surveyed. Brazil, Mexico, and Turkey are not included in weighting due to the absence of reliable data about their urban population.



Analysis by country

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

This includes an overview of consumption in each country, including details of the most popular news brands – traditional and online. The pages also contain statistics about the use of new devices such as smartphones and tablets and the role of different social networks for news. Information is drawn from the 2017 *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 (2017). Where appropriate, our country-based authors have also referenced industry statistics that supplement our survey-based approach.

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

In these pages we also include a number of charts showing brands on a left/right spectrum to illustrate differences in polarisation within media systems. There are a number of countries where political systems are not fully defined by this left-right spectrum and in these cases we have omitted these charts. A brief explanation of how we have arrived at the content of these maps is contained in the Polarisation section on p. 38, with a fuller explanation on our website. The full questionnaire, additional charts, and tables – plus the raw data – are available from our website www.digitalnewsreport.org.

Where available, comparison with 2016 data is indicated in brackets after each data point. Turkish data on paying for news have not been included this year so all payment figures are ranked out of 35 countries.

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

Europe

4.1	United Kingdom	54
4.2	Austria	56
4.3	Belgium	58
4.4	Croatia	60
4.5	Czech Republic	62
4.6	Denmark	64
4.7	Finland	66
4.8	France	68
4.9	Germany	70
4.10	Greece	72
4.11	Hungary	74
4.12	Ireland	76
4.13	Italy	78
4.14	Netherlands	80
4.15	Norway	82
4.16	Poland	84
4.17	Portugal	86
4.18	Romania	88
4.19	Slovakia	90
4.20	Spain	92
4.21	Sweden	94
4.22	Switzerland	96
4.23	Turkey	98

Americas

4.24	United States	102
4.25	Argentina	104
4.26	Brazil	106
4.27	Canada	108
4.28	Chile	110
4.29	Mexico	112

Asia Pacific

4.30	Australia	116
4.31	Hong Kong	118
4.32	Japan	120
4.33	Malaysia	122
4.34	Singapore	124
4.35	South Korea	126
4.36	Taiwan	128



Europe

4.1	United Kingdom	54
4.2	Austria	56
4.3	Belgium	58
4.4	Croatia	60
4.5	Czech Republic	62
4.6	Denmark	64
4.7	Finland	66
4.8	France	68
4.9	Germany	70
4.10	Greece	72
4.11	Hungary	74
4.12	Ireland	76
4.13	Italy	78
4.14	Netherlands	80
4.15	Norway	82
4.16	Poland	84
4.17	Portugal	86
4.18	Romania	88
4.19	Slovakia	90
4.20	Spain	92
4.21	Sweden	94
4.22	Switzerland	96
4.23	Turkey	98

UNITED KINGDOM



The UK's relationship with Europe has been the central political issue following the Brexit vote and a surprise election. This has also influenced a media environment characterised by a strong public broadcaster (the BBC) and a highly competitive national press struggling with digital transition.

Trust in the UK media took a significant knock (-7 percentage points) in the wake of a bruising and polarising Brexit campaign. The role of the BBC came under particular scrutiny, with the referendum taking place when the corporation was seeking a new charter. Remainers accused the BBC of pursuing 'unthinking balance' and failing to expose the exaggerations and distortions of the Leave side. The right-wing press and websites played a key role as cheerleaders of the Leave campaign as well as attacking the BBC for a perceived pro-EU bias. None of this has enhanced the reputation of mainstream journalism, at the same time as the growth of social media (+6) exposed people to alternative perspectives and a more emotive form of news. Polarised news sites such as left-leaning the Canary (2%) and alt-right Breitbart (2%) have started to pick up (some) traction in the UK on the back of increased social media use. Politicians are becoming increasingly concerned about the implications of this rapidly changing media ecosystem. Parliamentary hearings were getting underway into fake news before the election and the Conservative manifesto promised to crack down on social media

and search engines that fail to tackle extremism and illegal adult material.

Meanwhile UK news publishers are pursuing a combination of radical cost-saving and increased collaboration in the face of steep declines in print advertising revenues. Overall, print ad spending fell by 13% in 2016, according to Enders Analysis, with Facebook and Google being the main beneficiaries of the move to online. Partly as a result of these trends the *Guardian* newspaper, which has lost over £100m in the last two years, shed 250 jobs in the UK and has cut its US staff. At the same time, it is considering moving to a tabloid format to save printing costs and announced a content-sharing deal with Vice which will see the work of *Guardian* journalists air on nightly news programmes in the US and UK. Other potential collaborations include the Telegraph Media Group, Trinity Mirror, and News UK forming a single advertising sales operation to make it easier for agencies to buy audiences.

A number of publishers are pursuing diversified revenue streams including membership, paid content, e-commerce, and events. The *Financial Times* has around 750,000 paid subscribers, of whom 550,000 subscribe to a digital platform, while *The Times* has around 200,000 digital subscribers paying £6 a week. Perhaps the most unlikely success of the year came with the launch of a pop-up printed newspaper, the *New European*, which made modest profits for its publisher Archant.

There is particular concern about the future of local news as newspapers scale back coverage of local democratic institutions such as councils and courts.

STATISTICS

Population	65m
Internet penetration	92%

Trinity Mirror is looking to deliver cost savings of around £20m while Johnston Press, which owns 200 titles across the UK, including the *i*, the *Yorkshire Post*, and *The Scotsman*, is selling off some of its smaller weekly papers. To address concerns of a democratic deficit, the BBC has been encouraged by the government to fund 150 local reporters, which other local newspaper groups can use.

The new BBC charter gives funding certainty for around a decade but part of the price has been a commitment to further efficiencies. Despite this, the BBC remains Europe's most successful public broadcaster with impressive weekly reach for news online (47%) and via TV and radio (67%). The BBC has invested in new formats including new 'ten to watch' vertical videos within its mobile app. It has also experimented with Instant Articles and Facebook Live and is a global launch partner of Facebook audio.

Traditional media brands are facing new competition from a number of digital-born media brands. BuzzFeed News (8%) has consolidated its position, with strong political coverage aimed at millennials. Its investigative team broke a major story around match fixing in tennis, in a historic partnership with the BBC. The *Lad Bible* (6%) has gained audience in the past year with a light-hearted content mix aimed at young men. The *Huffington Post* (14%) continues to build audiences in the UK, with the range of its coverage and strong solutions-based journalism.

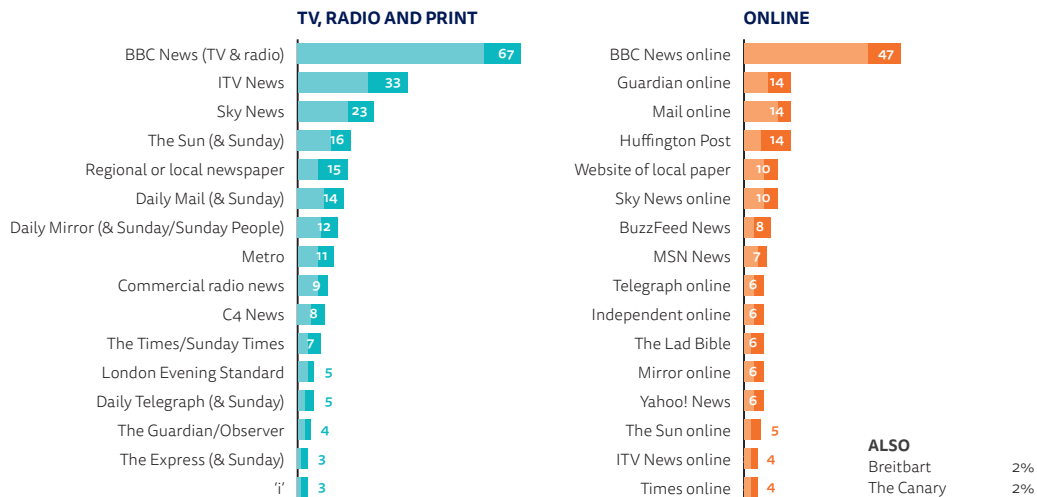
Nic Newman

Research Associate, Reuters Institute for the Study of Journalism

TOP BRANDS

% Weekly usage

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

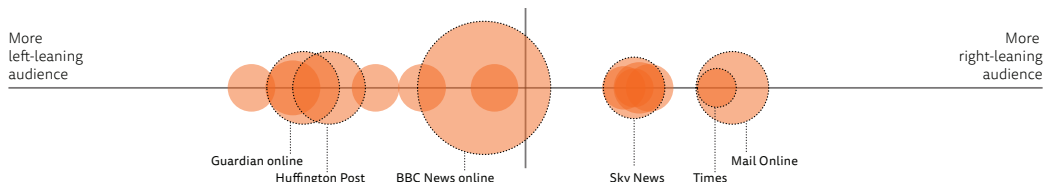


PAY FOR ONLINE NEWS



6% (-1)
(=34th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

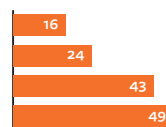
22% (+1)
(=27th/36)

BRAND ATTRIBUTES

% of BBC News users who say it is best for...

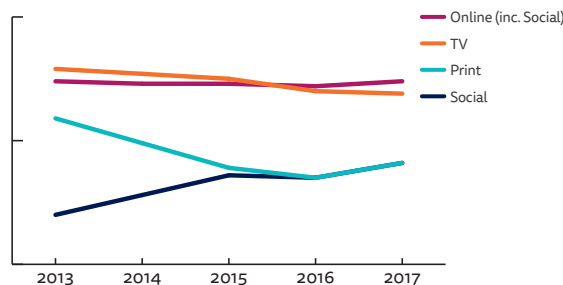
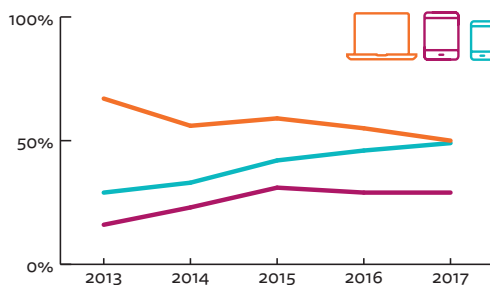


% of Mail Online users who say it is best for...



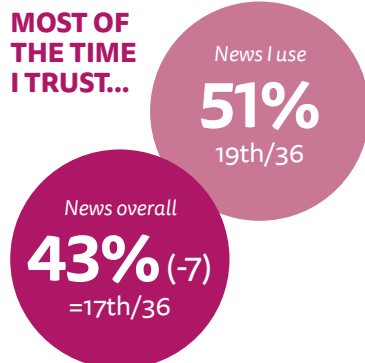
CHANGING MEDIA

More than four in ten (41%) use social media for news while smartphone usage is sharply up again, matching the computer as the most important device for accessing news.



TRUST

There has been a significant fall in those who agree that the news can be trusted (from 50% to 43% in the past 12 months) with under 35s particularly distrustful. Much of this may be related to the use of social media where only 18% say that social media can be trusted to separate fact from fiction, compared with 41% for news brands.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	29% (+1)	65%
2	Twitter	12% (-)	25%
3	YouTube	7% (-)	46%
4	Facebook Messenger	5%	37%
5	WhatsApp	5% (+2)	33%

AUSTRIA



The spread of fake news and hate speech through social media became a key issue in Austria's divisive presidential elections. Despite the growing influence of online media, Austrians still enjoy the highest printed newspaper consumption rates in Europe.

The polarised state of Austrian politics was exposed in 2016 by an election that almost saw the first freely elected far-right head of state in Europe. Norbert Hofer of the anti-immigration Freedom Party (FPÖ) eventually narrowly lost the presidency to former Greens leader Alexander Van der Bellen, after the results of an extremely close first round were annulled in June.

During the campaign, Van der Bellen had to deny rumours – which started first on Facebook – that he was suffering from lung cancer and dementia. The election was also marked by several false profiles including that of a 'fictitious' German green politician, Tobias Weihrauch, whose postings calling for 'as many Syrians and Africans as possible in our country' were shared by outraged right-wing Austrian groups on Facebook.¹⁷ Austrian legislators have accused Facebook of not doing enough to prevent false profiles, fake news, and the spread of hate speech, with only around 20% of reported examples removed. Regulatory action is planned for 2017.

Fuelling many of these stories was Unzensuriert.at (Uncensored). This right-wing, anti-Europe, anti-immigration website was founded by a former Freedom Party politician and its articles are shared on Facebook by party members. It has recently expanded to Germany.¹⁸ Comment forums on the website included cases of hate speech which were subject to a court injunction, along with false claims that Van Bellen was a spy.

Our survey shows heightened interest in politics and news in general, with two-thirds of respondents (67%) saying they are extremely or very interested in news and 68% that they access the news at least twice a day (up from 56% in 2015). Austrians have also seen a significant increase in access via mobile, with smartphones now used for news by 56% of the respondents and considered as the main device by 42%. A quarter (25%) use mobile news apps, up from 13% in 2015, and mobile notifications are also up significantly, driven by the elections and interest in the progress of the national football team in the European championships.

There have been few changes in the brands used for news over the last year, with public service broadcaster ORF still dominating online and traditional access to news. The survey also revealed that orf.at is the preferred brand for accuracy, while derstandard.at is the favourite brand for explaining complex issues and for providing strong opinions, while the satirical dietagespresse.com, for the first time included in the survey, is the preferred brand for amusing content.

STATISTICS

Population	8.6m
Internet penetration	83%

Although the media environment is still characterised by one of the highest printed newspaper consumption rates in Europe, particularly through subscriptions, structural changes are contributing to the slow but steady transition to digital. The decline of print distribution was particularly severe for *Der Standard* and *Kurier*, as they experienced a decrease of over 5% compared to the previous year. Significant for the news landscape was the closure of the business paper *Wirtschaftsblatt* in September 2016 by the Styria Media Group. Plans for a new online venture organised by the journalists were discussed but ultimately failed to materialise. Also important was the closure in April 2017 of nzz.at, the digital news outlet primarily financed by subscriptions, launched in January 2015 by the Swiss *Neue Zürcher Zeitung* (NZZ). Bertelsmann's Gruner+Jahr sold its majority stake in the largest news magazine *News*, to the magazine's director Horst Pirker, after substantial losses in 2014 and 2015. The *Heute* publishing company teamed up with Media Group Tamedia, the publisher of *20 Minuten* and *Tages-Anzeiger* in Switzerland. Tamedia acquired a minority share (25.5%) of the printed newspaper *Heute* and the majority (51%) of *Heute's* digital ventures.

Efforts to use social media and messaging services such as WhatsApp and Facebook Messenger for extending reach and brand awareness have intensified – with services created or significantly expanded by outlets including OE24, ORF, GMX, and Krone. Despite the fact that the extent of the online remit of the public service broadcaster ORF is still under discussion by the authority for broadcasting, a new 100-second news broadcast (ZIB100) designed for distribution over social media and messaging services was launched in April.

Sergio Sparviero and **Josef Trappel**, with additional research by **Stefan Gadringer**, **Jana Büchner**, and **Roland Holzinger**
University of Salzburg

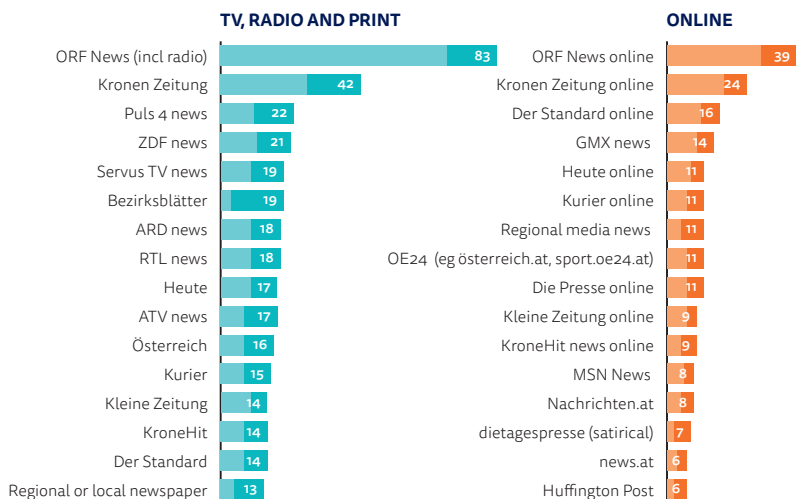
¹⁷ <http://derstandard.at/2000047590089/Gefaelschte-Hasspostings-erfundene-Gruene-Fakes-im-Wahlkampf>

¹⁸ <https://www.vice.com/alps/article/unzensuriertat-expandiert-jetzt-nach-deutschland>

TOP BRANDS

% Weekly usage

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

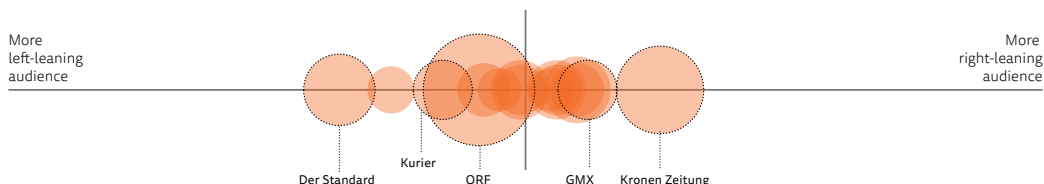


PAY FOR ONLINE NEWS



7% (-)
(=32nd/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

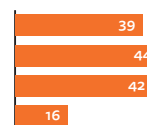
23% (-3)
(=22nd/36)

BRAND ATTRIBUTES

% of ORF News users who say it is best for...

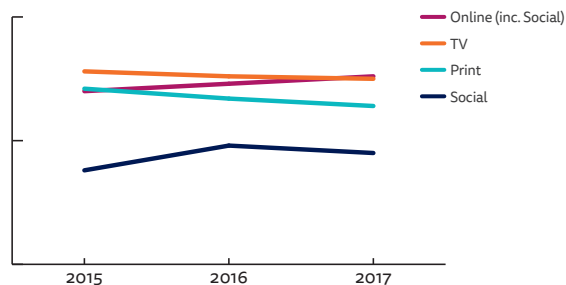
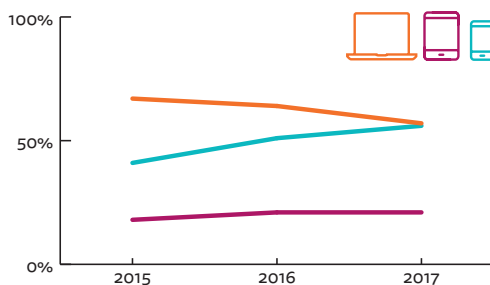


% of Der Standard users who say it is best for...



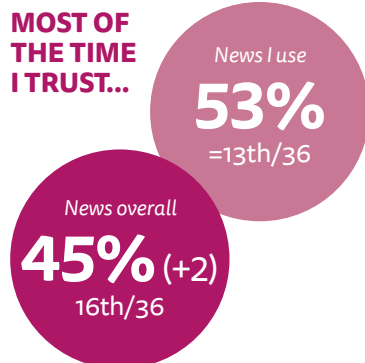
CHANGING MEDIA

Readership of printed newspapers remains higher than in most other countries in our survey and is declining more slowly in the face of online competition. Smartphone usage for news has grown rapidly over the last few years.



TRUST

There is a significant trust gap between over 35s (48%) and under 35s, the so-called millennials (36%). There is also a close relationship between political parties and the most used news brand ORF, as representatives of political parties are part of its board of Trustees. This may account for the relatively low number (23%) who agree that the media is free from political influence.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	34% (-1)	63%
2	YouTube	16% (-1)	59%
3	WhatsApp	16% (+3)	63%
4	Facebook Messenger	5%	29%
5	Twitter	4% (-1)	11%

BELGIUM



Belgium is a small media market, further fragmented by language. It effectively has two distinct publishing sectors for the French- and Flemish-speaking populations, both with strong public service news media.

In the past year, Belgian media groups have directed their gaze north and south of the country. After buying Dutch news company NRC Media in 2015, Mediahuis bought out its partners in Media Group Limburg and is acquiring Telegraaf Media Group, one of the largest Dutch publishers. Most Dutch newspapers are now owned by Belgian publishers Mediahuis and De Persgroep, who are pursuing scale as a key strategy for sustainability. Group Rossel sought to further strengthen its position in the north of France, but ultimately failed to acquire a local newspaper.

All this took place against the backdrop of yet another decline in readership for all newspapers. In Flemish-speaking Flanders, print sales were down by 4.2%. Digital subscriptions have helped contain losses but do not make up for an overall revenue decline (-2.2%). *De Morgen* is the exception, compensating a big loss in print (-7.9%) with digital editions. Other main broadsheets *De Tijd* (+1.0%) and *De Standaard* (-0.7%) have broadly maintained revenues. Amongst tabloids, *Het Nieuwsblad* (-5.3%) sees an important decline compared to its main competitor *Het Laatste Nieuws* (-0.1%), even though both remain the top online news brands.

Again, the decline has been steeper amongst French-language newspaper groups (-6% in print, -2.7% in print and digital editions). We should note here the strong orientation of the public towards media outlets in France itself – in contrast to Flanders which has never felt strongly culturally connected to the Netherlands. *Le Soir* (-7.9%) and *Sud Presse* (-7.2) suffer the biggest blows in print, but end up at -3.0% and -2.3% respectively when including digital editions. *La Dernière Heure* (-4.9%) and German-language *Grenz Echo* (-3.8%) lost the most in total.¹⁹

Public broadcasters VRT (Flemish) and RTBF (French) continue to consolidate their position in TV and radio, while trying to further develop their online and mobile offerings. After much delay, VRT finally launched its online media player VRT NU. It also launched VRT NWS to replace *dereactie.be*. VRT NWS aims to become a cross-channel brand, offering news users an online starting point from which to branch out into different channels and formats. This will be supported by an ongoing reorganisation of the newsroom into thematic editorial clusters feeding news to TV, radio, and online channels.

VRT and RTBF operate in a political context of cost-cutting and reduced room for manoeuvre. Pressured by the large publishing groups, VRT management has agreed to limit its online scope to video-centred content in the period to 2020. In a collaboration agreement with De Persgroep, VRT short-form videos are now being published across the print company's network of news sites.

STATISTICS

Population	11m
Internet penetration	88%

When it comes to trust, the public service broadcasters play an important role, as both are in the top three news brands offline and online, and are strongly valued by their users for accuracy and understanding complex issues. Roularta, through its sites *Knack.be* (Dutch) and *levif.be* (French), was the latest in a line of news outlets to close online comment sections because of the uncivilised tone of its contributors. Most controversy, however, surrounded a €350,000 damages claim issued by a real estate developer, and a close collaborator of Bart De Wever, leader of Flanders' largest party, the centre-right NVA, against Apache, a small-scale investigative news site that scrutinised underhand construction deals. Journalists and academics strongly reacted against what they saw as an intimidation attempt. Mr De Wever from his side called Apache 'a slanderous medium'.

One other key development was the allocation of €200,000 by the Flemish government for four media innovation projects, including a digital platform for freelance journalists to pitch their stories. This was the first such public media initiative since the Media Innovation Centre (MiX) ceased to exist in 2015 and since VRT saw its funding for media innovation evaporate in its new management agreement. Ironically, in early 2017, the big publishers pulled the plug on Media ID, a single sign-on system across the big Flemish news sites, regarded as MiX's flagship project, which enjoyed over €2m in subsidies.

Ike Picone

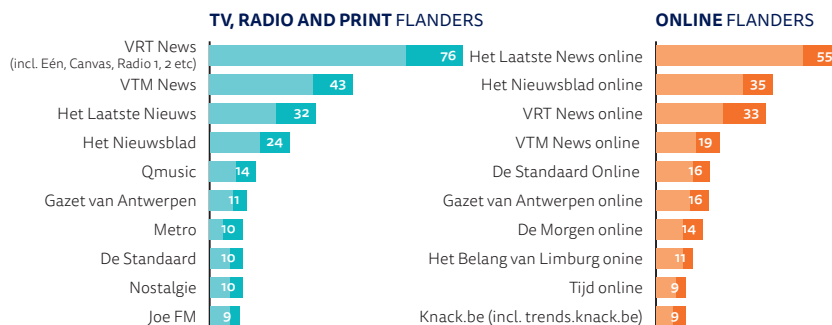
Vrije Universiteit Brussel, Brussels

¹⁹ <http://www.cim.be/nl/pers/echtverklaring-resultaten>

TOP BRANDS

% Weekly usage

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



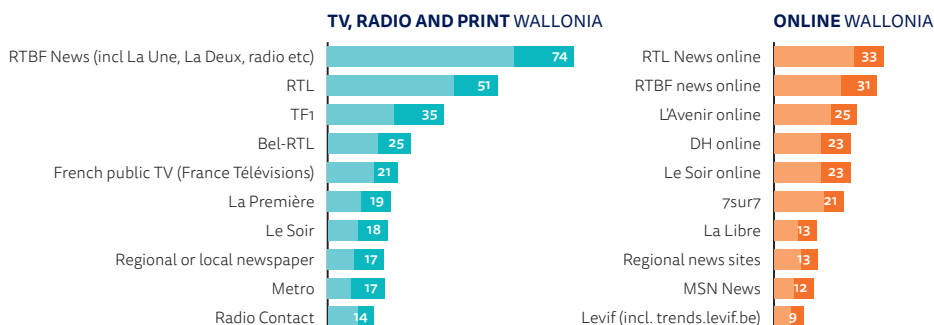
PAY FOR ONLINE NEWS



12% (-)

(=16th/35)

Flanders 11%
Wallonia 14%



USE AN AD-BLOCKER

23% (-)

(=22nd/35)

Flanders 17%
Wallonia 28%

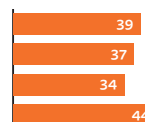
BRAND ATTRIBUTES FLANDERS

% of Het Laatste News users who say it is best for...



BRAND ATTRIBUTES WALLONIA

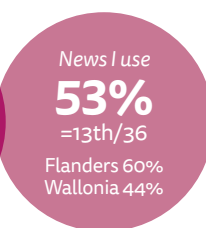
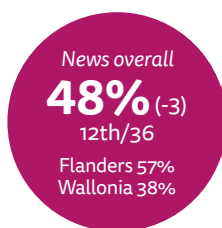
% of RTL News users who say it is best for...



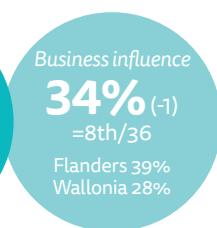
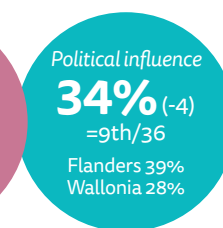
TRUST

News brands enjoy high levels of trust in Belgium, which might be due to a general lack of explicitly partisan media, no recent press scandals, and well-functioning self-regulation through the Council of Journalism. Flanders shows higher levels of trust than French-speaking Wallonia, with Flemish publishers fiercely protective of their editorial independence in reaction to the partisan image they had after the Second World War.

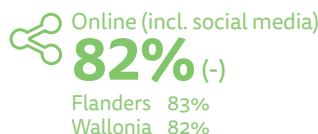
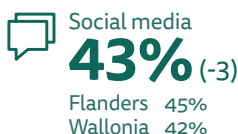
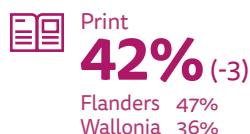
MOST OF THE TIME I TRUST...



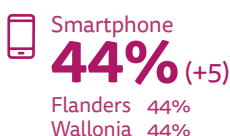
THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news (F/W)	All (F/W)
1	Facebook	40% (-) (37/43%)	66% (66/66%)
2	YouTube	15% (11/20%)	50% (49/52%)
3	Facebook Messenger	7% (5/10%)	33% (36/31%)
4	WhatsApp	5% (+) (5/7%)	27% (32/21%)
5	Twitter	4% (4/4%)	11% (11/11%)

CROATIA



STATISTICS

Population	4.2m
Internet penetration	74%

The Croatian media market is characterised by a strong television sector, concentrated national press with falling print runs, and a growing sector of born online and legacy online news providers.

A key media issue over the past year has been the threat to the editorial independence of the public service broadcaster (HRT) after a large number of journalists and editors were demoted or reassigned and the head of HRT was replaced following parliamentary elections. Members of the new conservative government coalition have also threatened the financial stability of HRT with plans to reduce its licence fee by the end of this year. In addition, the government has cut subsidies to non-profit media.

At the same time, HRT has gradually been losing its long-held primacy in news to commercial rivals. Nova TV, owned by Central European Media Enterprises (CME), a Bermuda-based company with TV stations in six Central and Eastern European countries, leads in terms of weekly news reach (64%), followed by the German-owned RTL (60%), and HRT now in third place (44% for TV broadcasts and 58% including radio).

In the newspaper market, the most popular title is the tabloid *24sata* (39%) owned by the Austrian company Styria. *Jutarnji list*, Croatia's largest circulation daily broadsheet, is also popular (30%) and is part of the largest Croatian print

media company Hanza Media, formerly Europa Press Holding. But, as elsewhere, the role of print has declined rapidly as online and mobile news becomes more important, especially for younger groups. Between 2008 and 2013 print circulation of daily newspapers fell from 640,000 to 300,000 copies per day.²⁰ Advertising spending in print media fell from €104m in 2008 to just €36m in 2015, while online spending rose from €4m to €22m over the same period.

In terms of online news, the top brand (Index.hr) is a digital-born news portal preferred for its strong (centre-left) opinions. Legacy media companies are also popular, notably the website of a tabloid newspaper *24sata* which is valued by its audiences for amusing and entertaining content. By contrast *Jutarnji.hr* is recognised by its users as the best for understanding complex issues.

Audiences in Croatia are averse to paying for the news or being distracted by ads online, which makes it even harder to develop a viable online business model for news, despite increasing online news audiences. Traditionally low newspaper subscription habits offline have not been reversed in the online environment.

Dnevnik.hr (39%) is the digital presence of offline leader Nova TV news programme and the largest television source in the digital media environment. The online presence of the public service broadcasters HRTi has a modest 10% weekly use, reflecting the relative failure of their online news strategies as well as possibly disillusion with changing

editorial policies. In the top 10 online sources legacy outlets (two television stations and four newspapers) co-exist with digital-born brands like Index and Net.hr, which have become an important part of the digital landscape.

Meanwhile, in an atmosphere of low trust, increasingly negative news, and political populism, many Croatians are turning to social media (56%) as an outlet for their concerns and as an alternative to traditional media.

Zrinjka Peruško

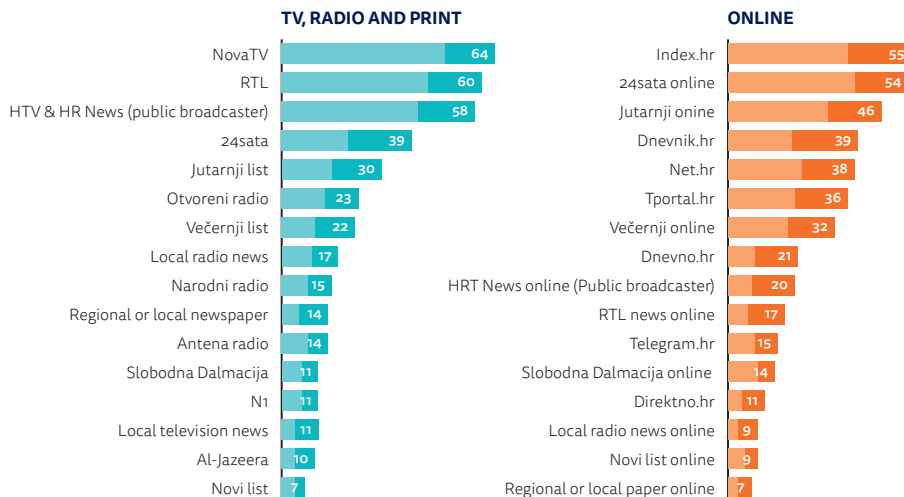
Centre for Media and Communication Research, University of Zagreb

²⁰ Vozab 2014 https://cimfpzg.files.wordpress.com/2016/10/ms_vol5_br10_09w-4.pdf

TOP BRANDS

% Weekly usage

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

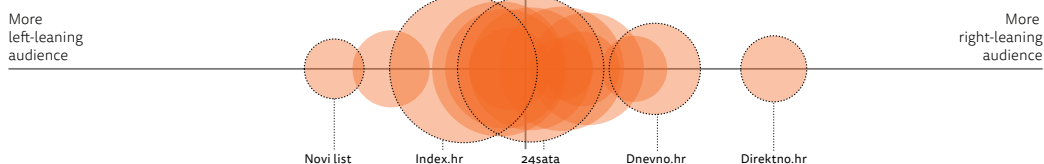


PAY FOR ONLINE NEWS

8%
(=29th/35)



AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS

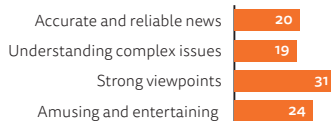


USE AN AD-BLOCKER

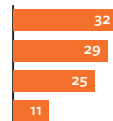
27%
(=9th/36)

BRAND ATTRIBUTES

% of Index.hr users who say it is best for...



% of Dnevnik.hr users who say it is best for...



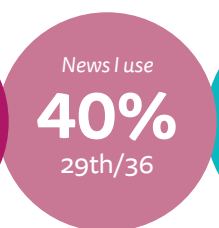
TRUST

Croatia exhibits overall low levels of institutional trust in government and political institutions, but positive correlation exists between regular television use and trust in government. Our survey responses place Croatia in the bottom third of countries both for trust in news overall 39% (24th) and for being free from political influence 15% (32nd).

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	57%	74%
2	YouTube	26%	72%
3	Viber	14%	52%
4	Facebook Messenger	9%	44%
5	Google Plus	9%	17%

CZECH REPUBLIC



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

The continued growth of the Czech advertising market has significantly gathered pace in the last year, climbing by 15% in 2016. This was mainly due to rising spend on TV (+19%). However, online ad spending has grown the fastest (+31%), surpassing print for the first time and increasing its overall share of the advertising market to 21%.²¹

The decline in circulation of Czech daily newspapers, witnessed since the 2009 economic crisis, slowed down last year to an average 3.5%,²² a trend observed across both quality papers and the tabloid press. One of the quality papers, *Lidové noviny*, even managed to slightly increase its circulation. Conversely, the local version of *Newsweek*, licensed by its US publisher IBT Media, closed down its operation in December, only a year after its launch.

In 2016, two ambitious online news projects were started by some of the key media players on the market. The leading web portal and second-biggest search engine Seznam.cz launched a news site Seznam Zpravy in October, a combination of daily video and text-based news, as well as video commentaries. Having assembled several

popular and experienced journalists from other newsrooms, Seznam Zpravy has quickly established itself as the top online news media brand in the country. Towards the end of the year, the media house Czech News Centre (formerly Ringier Axel Springer) launched Info.cz, a news server with the motto 'The Power of Facts', indicating its aim to emphasise quality and selectiveness over sheer quantity of information offered to the users.²³

Apart from the online news business, Seznam.cz has also expanded into the realm of digital television, by launching Seznam.cz TV, available on smart televisions via the HbbTV platform. The hybrid broadcasting format, first launched by the public service broadcaster Ceska televize, is currently being explored by an increasing number of players, including both of the main commercial channels, TV Nova and TV Prima, both of which introduced the 'Red Button' in 2016. Additionally, the music station TV Ocko became the first to utilise programmatic advertising via this platform.

The process of convergence of technological companies and content providers has continued in the IPTV market. The hegemony of the leading Czech telecommunication company O2 was broken when T-mobile launched its IPTV service, branded T-mobile TV. O2 has in the meantime significantly expanded its offer by establishing several new thematic sports channels, aimed to compete with TV Nova's sports stations, as well as with the localised versions of the transnational Eurosport franchise.

STATISTICS

Population	11m
Internet penetration	88%

Czech online users' news habits have not changed dramatically in the past year, although the computer is gradually becoming less dominant among the devices used to access news. Tablet use for news consumption remains low and stagnating, a tendency which most likely contributed to the closure of the first Czech tablet weekly Dotyk in 2016.

Willingness to pay for online news continues to be among the lowest in Europe. This is certainly both the cause and the consequence of the fact that the majority of Czech online news content remains free. Most content producers are wary of discouraging users with hard paywalls, and instead experiment with freemium models. This is true of tabloid Blesk.cz which since 2016 has offered some exclusive paid content, while its sister service iSport.cz (also owned by the Czech News Centre) started charging to view all football matches from the national league, previously available for free. A couple of new projects are exploring the premium, exclusive business news, including the website MotejlekSkocdopole.com, established and run by two economic journalists, or BusinessMonitor24, an affiliate of the online news platform Echo24.cz.

Parlamentni listy, a Czech version of Breitbart News, is infamous for disseminating hoaxes and hate speech. The challenges of fake news and disinformation campaigns on social media were heavily discussed in 2016, prompting a response from the government. In December they set up a special unit at the Ministry of Interior, aimed at combating fake news and state-sponsored disinformation.

Václav Štětka
Loughborough University

²¹ <http://www.inzertnivykony.cz>

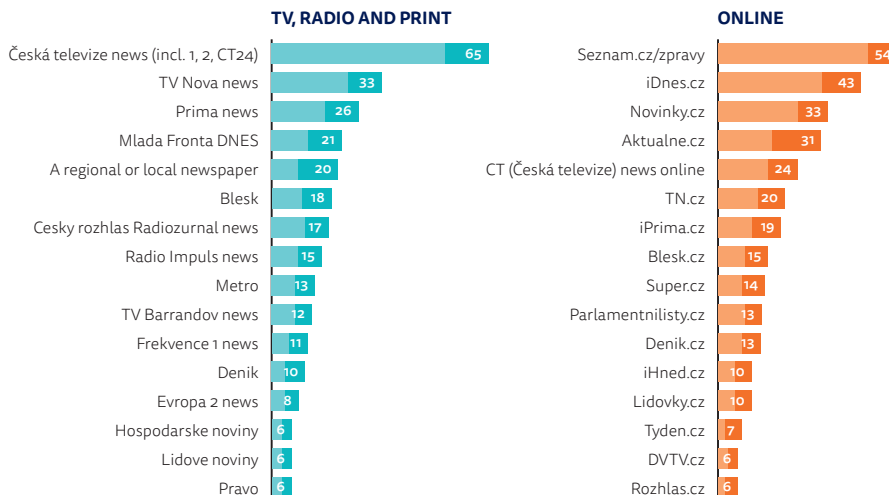
²² <http://www.abccr.cz/overovana-data/periodicky-tisk>

²³ <https://www.mediaguru.cz/2016/12/medialni-trh-i-letos-prochazel-konsolidaci>

TOP BRANDS

% Weekly usage

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



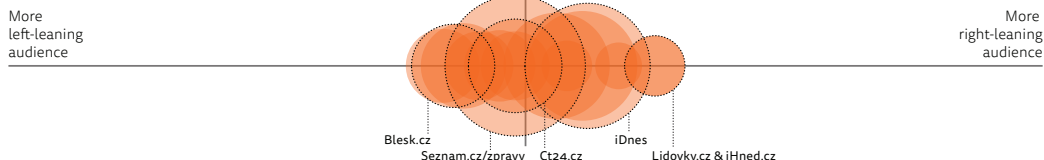
PAY FOR ONLINE NEWS



8% (+1)

(=29th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



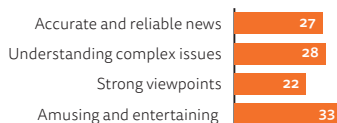
USE AN AD-BLOCKER

23% (+2)

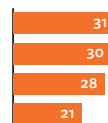
(=22nd/36)

BRAND ATTRIBUTES

% of Seznam.cz/zpravy users who say it is best for...

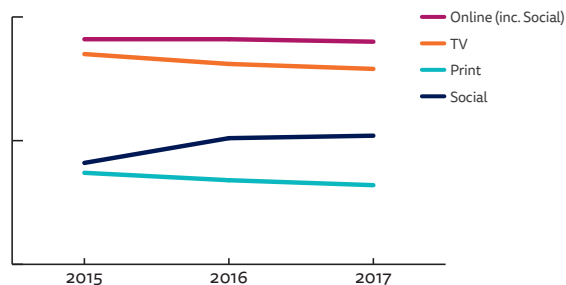
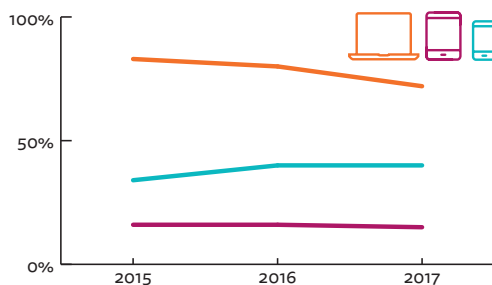


% of iDnes.cz users who say it is best for...



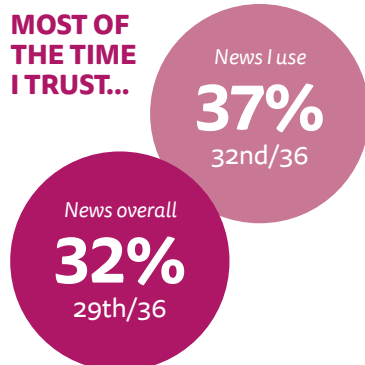
CHANGING MEDIA

Smartphone use for news (40%) has grown more slowly than in many other European countries while the computer still dominates (72%). Social media news use (52%) is at the same level as the EU average.



TRUST

High levels of distrust in the mainstream media relates to the perception that they act in the interest of political and economic actors rather than in the public interest. This distrust is further stimulated and exploited by quickly growing 'alternative' media outlets.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	47% (+1)	69%
2	YouTube	21% (-1)	57%
3	Facebook Messenger	10%	33%
4	WhatsApp	5% (+2)	18%
5	Google Plus	4% (-1)	9%

DENMARK



The media environment continues to be characterised by strong public service broadcasters (DR and TV2) and a strong national press, but the already entrenched debate about the role of public service media online is intensifying ahead of a new remit in 2018.

The Danish media landscape is in a stage of transition characterised by increasing international competition, especially in advertising, and a widening generational gap between young and old media users.

The dramatic increase in getting news weekly through social media until 2016 (56%) was halted in 2017 (53%), and fewer now say that social media are their main source of news (from 12% to 10%). This development also holds for young people. Other social media operators continue to be dwarfed by Facebook as the unrivalled market leader in Denmark (but falling from 43% to 39%), with WhatsApp and Twitter remaining insignificant among ordinary users. News on mobile has overtaken computer use for news for the first time.

In the newspaper sector, industry figures indicate that after print readership plateaued in 2015, the downward trend resumed in 2016, with a 10–15% fall for national dailies.²⁴ Niche newspapers with a focus on background and depth seem less vulnerable (*Kristeligt Dagblad*, *Weekendavisen*).

Reach for individual news brands is dominated by the public service institutions offline as well as online. Overall the balance between private and public service media has been stable since 2016, but the online reach of both public service providers has decreased significantly. The high 2016 levels can probably be explained by a surge in news interest in January–February, due to several exceptional news stories about public scandals, one of which threatened the life of the government.

The acquisition of Denmark's oldest newspaper group Berlingske by the Belgian De Persgroep in 2016 has resulted in a changed content profile for the morning daily *Berlingske* towards more cultural coverage and a more accessible approach to its business coverage. Berlingske's tabloid *BT* acquired control of the only remaining free daily *metroexpress* from Swiss Tamedia (November 2016). The JP/Politiken Group was blocked from acquiring the daily business paper *Børsen* by the state competition regulator, arguing that a merger would damage the national print and online market in relation to both advertisers and subscribers. Instead Politiken acquired a 49.9% share in *Børsen*.

The main online-born news actors Zetland and Føljeton, with a mission to rejuvenate online journalism through background and in-depth coverage, are struggling to reach subscription levels sufficient to supplement the sizeable public subsidy. Right-wing online news platforms without party affiliation are emerging, such as Den korte avis (est. 2012), NewSpeak Networks (est. 2015), and 24nyt.dk (est. 2017).

STATISTICS

Population	5.7m
Internet penetration	96%

All are increasingly being criticised for providing services that come perilously close to fake news. International digital-born actors like BuzzFeed and the Huffington Post are hardly measurable in Danish readership surveys.

The willingness to pay for online news seems to have plateaued at the level of 2016. After Politiken and Berlingske abandoned their metered models for the freemium model in 2016 to give subscribers a greater sense of value for money, all Danish newspapers now see some form of freemium model as the key to viability of their online services.

Public service news institutions continue to lose audiences for their offline products including news – TV more so than radio – but still reach almost two-thirds of the population on a weekly basis. Market research shows that seven out of ten Danes use a second screen as an accompaniment to watching TV. For the younger group, streaming now exceeds TV viewing. But the overall decrease is more than counterbalanced by the continued growth in users online, where private newspapers' fears of being outcompeted have led to repeated calls to politicians to curb the online services of public service media, especially licence-financed DR. The inclusion of two small right-wing parties within the liberal-conservative coalition in November 2016 made the government even more responsive to the arguments of private interests, for instance to a shift from licence-financing to tax-based funding.

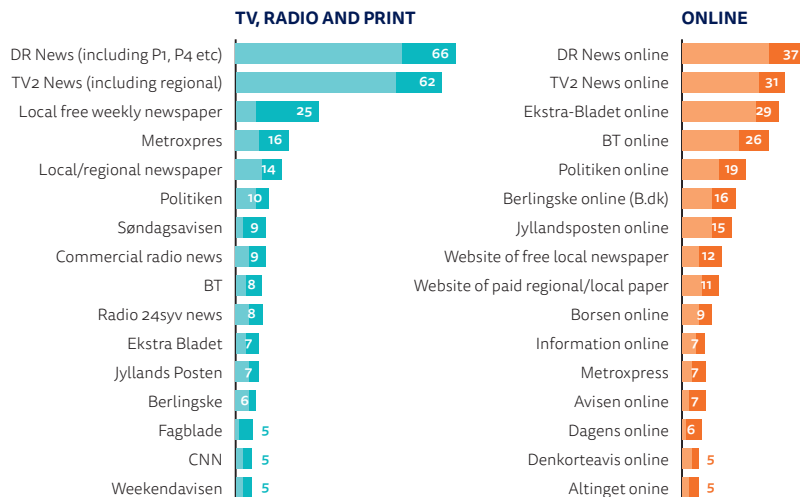
Kim Christian Schrøder and **Mark Ørsten**
Roskilde University

²⁴ Kantar Gallup, reported by the media news service Mediawatch: <http://mediawatch.dk/secure/Medienyt/Aviser/article9399439.ece>

TOP BRANDS

% Weekly usage

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



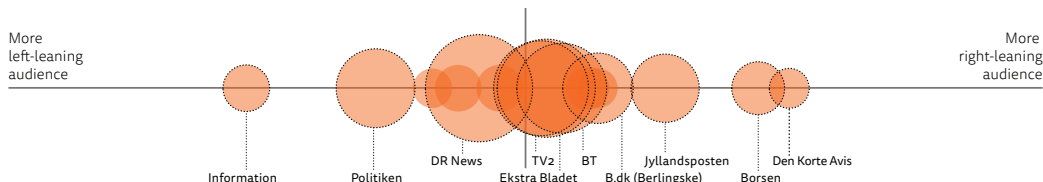
PAY FOR ONLINE NEWS



15% (-)

(=10th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

24% (-)

(=16th/36)

BRAND ATTRIBUTES

% of DR users who say it is best for...

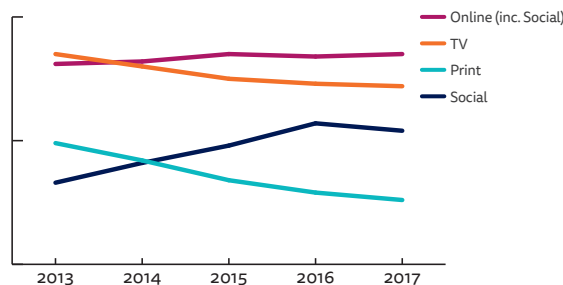
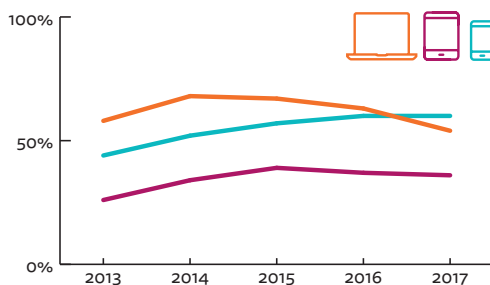


% of Ekstra Bladet users who say it is best for...



CHANGING MEDIA

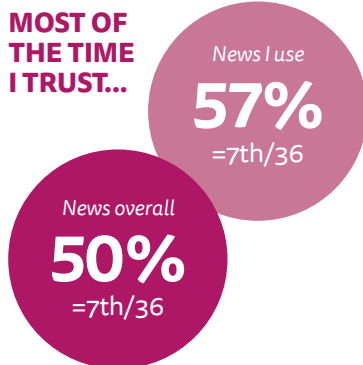
Danes have adapted fast to mobile technology and are lovers of Apple products in particular. The number accessing news via smartphone has overtaken those using computers for the first time. Print newspapers sell fewer copies than in other Nordic countries.



TRUST

While Danes have greater trust in the news media they themselves use, as in most other countries, they also have relatively high overall trust in the news. Journalism in Denmark is seen as independent and relatively free from both political and commercial influence. Despite this, there is some public concern about fake news, and Denmark's first fact-checking service has been founded by a niche news magazine/think tank.

MOST OF THE TIME I TRUST...



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	39% (-4)	74%
2	YouTube	7% (-)	49%
3	Facebook Messenger	7%	47%
4	LinkedIn	5% (-)	24%
5	Twitter	4% (-)	11%

FINLAND



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

Traditional Finnish media companies have maintained their strong and trusted audience position offline and online. The Finnish language and small market seem to shield national news brands somewhat against international competition while homegrown pure players have made little impact. Other reasons for the popularity of traditional Finnish media companies online are the amount of free content still available (especially the evening tabloids and YLE) combined with soft paywalls, bundled subscriptions, and the strong Finnish reading tradition.

The print circulations of newspapers have continued their decline in 2016. This is a serious problem for newspaper companies, because most of their revenue still comes from print. The biggest daily newspaper, *Helsingin Sanomat* lost 5.6% of its print circulation, and the second biggest daily, *Aamulehti*, lost 1.8% (source: Media Audit Finland). However, the overall situation in Finnish media business – not necessarily the news business, though – seems to have turned more positive. The total media advertising spend in 2016 grew slightly (0.9%) – with online advertising up 12.6% (source: Kantar TNS), and turnover of the

biggest Finnish media companies has also increased with Sanoma Media Finland reporting a growth of 1.4% (2015: -10.1%) and Alma Media 21.2% (2015: -1.3%). In 2016, Alma strengthened its online portfolio by buying a popular news and blog site Uusisuomi.fi (9% weekly reach). *Keskisuomalainen*, which has a strong position in newspaper publishing in central Finland, continued its growth strategy by acquiring ESS, a family-owned publisher of a regional newspaper in Lahti.

In contrast to the positive news from the advertising market, willingness to pay for digital news has not grown in Finland during the last few years – although the proportion paying (14%) is still higher than in many other countries. This may be connected to Finnish newspaper publishers' strategy of easing their print-readers' way into digital by offering bundled subscriptions at a similar price, or just a little higher, to print-only offers. This strategy has made bundled subscriptions quite popular in Finland, although room for further growth may be limited. Only 6% of those who do not pay for digital news say they are likely to pay in the next year. This somewhat bleak outlook has encouraged Finnish media companies to find business in new areas, making use of their user data and marketing skills. Transaction and marketplace websites such as cars, homes, and recruitment have become a much more important part of media companies' business portfolios.

The media industry in Finland is waiting for the government's decision to reduce the 24% VAT for digital media to the same level as print subscriptions (10%) from the

STATISTICS

Population	5.5m
Internet penetration	92%

beginning of 2018, subject to an EU decision to let member states decide their VAT level.

The discussion about YLE's position and its impact on private news media continued in 2016. The proposal from a parliamentary working group that YLE should support the Finnish News Agency (STT) by starting to use its services has now been implemented. Towards the end of 2016, YLE was accused of compromising its journalistic integrity by suppressing critical reporting of politicians including the Prime Minister. The leadership of YLE refuted the accusations and ordered an independent audit of journalistic decision-making within the organisation. The audit found signs of compromised journalistic integrity and suggested that YLE improves its processes to protect its independence.

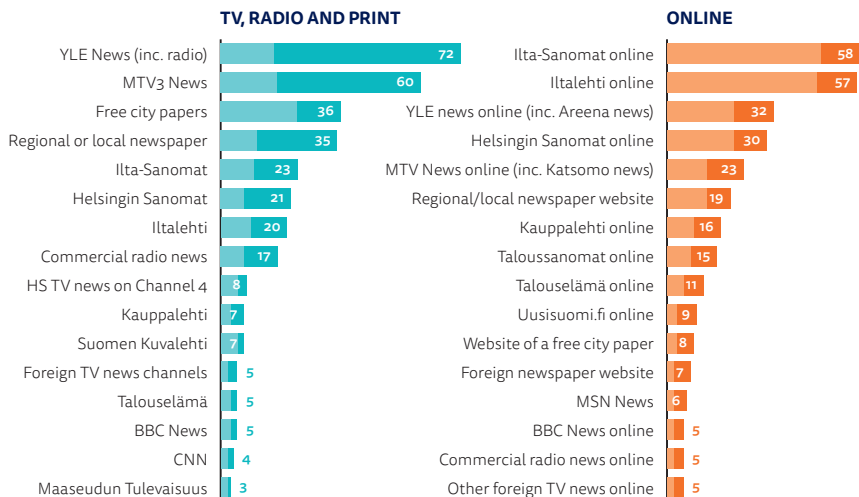
The most famous fake or alt-news site in Finland is *MV-lehti*, which is now under police investigation. The site offers news with a heavy anti-immigration, anti-Islam, and anti-legacy media slant, copying and modifying material from others. This site, and others like it, seeks to erode trust in the established news media. Even though these sites have many users, legacy media in Finland still occupy a position of trust, reflected in the high score (first) for overall trust in news (62%).

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University of Tampere, Finland

TOP BRANDS

% Weekly usage

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



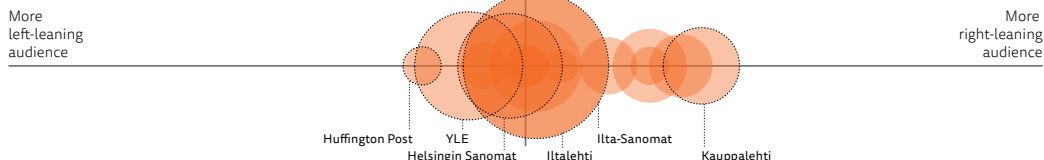
PAY FOR ONLINE NEWS



14% (-1)

(=12th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



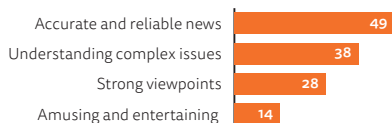
USE AN AD-BLOCKER

24% (-)

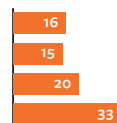
(=16th/36)

BRAND ATTRIBUTES

% of Yle users who say it is best for...

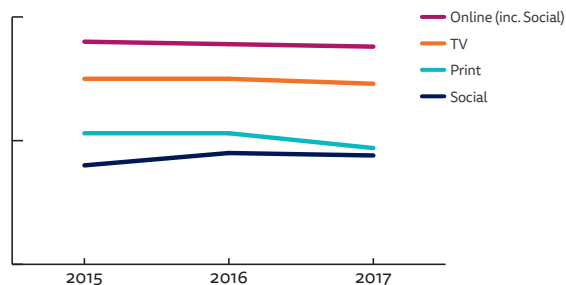
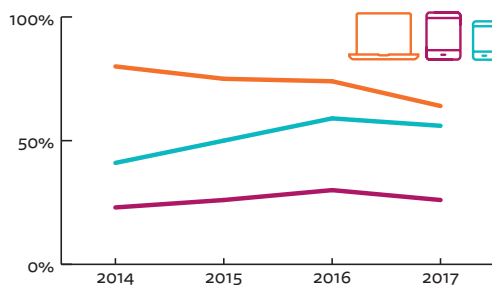


% of Ilta Sanomat users who say it is best for...



CHANGING MEDIA

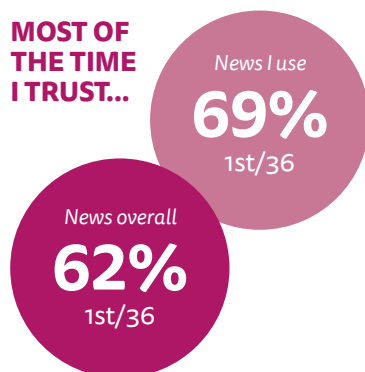
Readership of print newspapers and magazines (47%) continues to decline but from a much higher level than other European countries. Smartphone usage for news (56%) is reaching saturation but remains above the EU average.



TRUST

Finnish mainstream news media is not politically divided and the journalists have a relatively strong professional culture that values objectivity and independence. However, according to a recent study by the Finnish Newspaper Association, the trusted image applies better to the traditional news media (printed newspapers, YLE television, and radio) than the online news media.

MOST OF THE TIME I TRUST...



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	35% (+1)	69%
2	YouTube	11% (+2)	61%
3	WhatsApp	8% (+2)	49%
4	Twitter	5% (-1)	15%
5	Suomi24	5% (-)	20%

FRANCE



2017 has been marked by an unusually intense and unpredictable French presidential election campaign, which has redefined the media landscape and where online now for the first time matches TV as a source of news.

The presidential election has been dominated by breaking news, and in particular scandals about two candidates, Marine Le Pen (extreme-right) and the previous favourite François Fillon (right), which made the campaign both more newsworthy and uncertain than previous elections. This led to a strong appetite for real-time news, which benefited the main 24-hour TV channel BFM TV, with a reach of over 45%, as well as online news sites in general. In the midst of the Fillon scandal, nine of the ten most-read articles on the *Le Monde* website were about the affair. Meanwhile France remains under a state of emergency since the Paris attacks of November 2015. Almost 10m people watched the debate between five major candidates, held on TF1 and LCI, five weeks before going to the polls.

The intensity of the election campaign, together with fears about extremist propaganda and the role of fake news, has fuelled several innovations. One such, CrossCheck, was launched in February with support from Google and Facebook, involving several French media companies, to fight against misinformation.²⁵ In addition, LEMONDE.FR which had pioneered French

fact-checking with its team Les Decodeurs, launched a new product Les Decodex focused on fact-checking hundreds of French news websites, powered by a database of 600 of them. *Le Monde* has also been using Snapchat Discover to attract young audiences. Meanwhile *Le Figaro* planned to double its live video stream output in the run-up to the election.

In previous presidential elections new digital-born outlets were launched in France (Le Huffington Post in 2012, and Rue89 in 2007). Similarly, this year, Forbes, Business Insider, and Mashable – all American brands – launched French versions, and Politico, with two senior editors based in Paris, strengthened its presence. They are all chasing millennials and exploring new ways of monetising their brands, since digital advertising revenues are slowing down, partly due to the use of ad-blocking (31%).

In TV, in an attempt to attract young viewers, the 24-hour news channel LCI, part of the TF1 group and free to air since last year, hired 19-year-old Hugo Décrypte, a French YouTuber who creates political explainer videos. Another leading channel Itélé, owned by Vincent Bolloré, is in trouble, after a long-lasting strike in November 2016 led more than half of the newsroom to leave. It has now been renamed CNews.

In public service broadcasting, Franceinfo, which was originally a breaking-news public radio created in 1987, has been turned into a multimedia public service continuous news outlet, on radio as before, but with a new TV channel, and a new mobile application (previously called France TV Info), which is

STATISTICS

Population	66m
Internet penetration	84%

doing well online (12% of weekly reach). Franceinfo has also pioneered new formats including a new approach to fact-checking through Facebook Live videos compiled on the streets.²⁶

Meanwhile, press circulation is still declining in France and 740 newsstands closed in 2016 (4% of the total). A new design of newsstand has been tested in the south of Paris to display a broader range of newspapers. If it helps increase the sales, it could be rolled out more widely.

20 Minutes, a free daily newspaper created in 2002, now has a wider circulation than *Le Figaro*, with about 937,000 copies available per day on public transport. Online, 20minutes.fr is very powerful as well, mixing soft and hard news, and with no paywall. Paying for online news is still rare, with the exception of some specialist sites like the pure player Mediapart which claims 120,000 subscribers. *Le Monde* is experiencing a real shift in its audience, since it now has more digital (110,000) than print subscribers (100,000).

Inspired by the special offer made to the Amazon Prime clients to read the *Washington Post* for free, the telecom operator SFR, whose CEO Patrick Drahi now owns the daily newspaper *Libération*, the news magazine *L'Express*, and has some shares in NextRadio TV group (BFM TV, RMC radio, and a couple of digital titles), built a mobile application named SFR Presse, to give unlimited access to all of its titles.

Alice Antheaume
Vice Dean, Sciences Po Journalism School

²⁵ <https://firstdraftnews.com/crosscheck-launches>

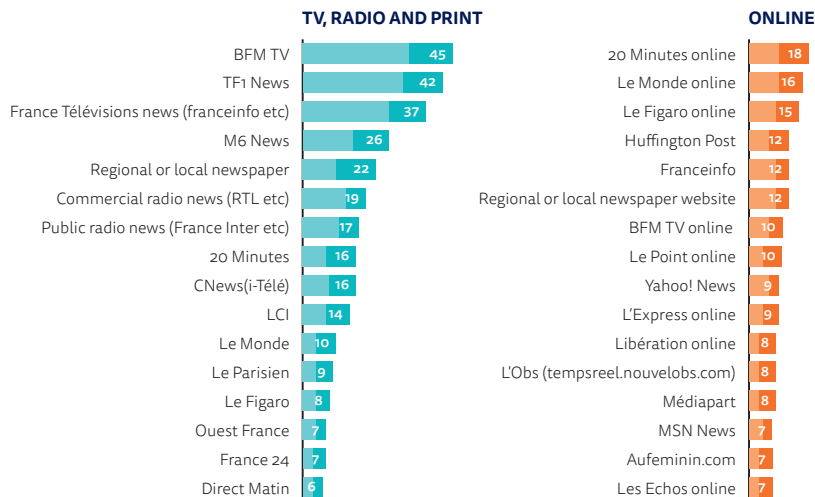
²⁶ <http://www.poynter.org/2017/a-french-journalist-is-bringing-fact-checks-to-millions-using-facebook-live-and-his-own-two-feet/456086>

²⁷ <https://www.demos.co.uk/press-release/the-age-of-fear-new-polling-reveals-a-gloomy-divided-europe>

TOP BRANDS

% Weekly usage

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



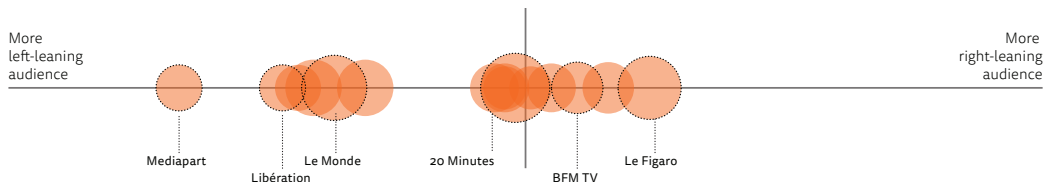
PAY FOR ONLINE NEWS



10% (-1)

(=22nd/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



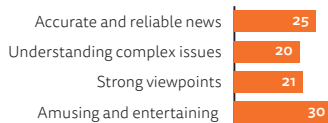
USE AN AD-BLOCKER

31% (+1)

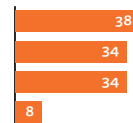
(=3rd/36)

BRAND ATTRIBUTES

% of 20minutes.fr users who say it is best for...

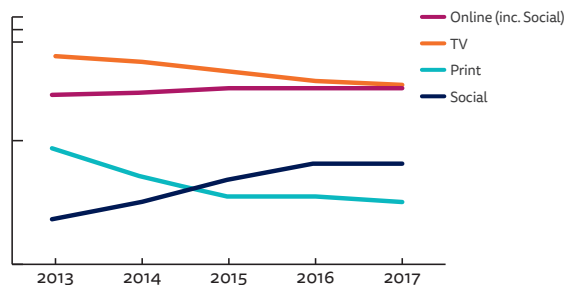
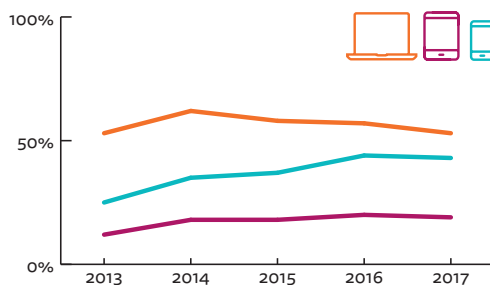


% of Lemonde.fr users who say it is best for...



CHANGING MEDIA

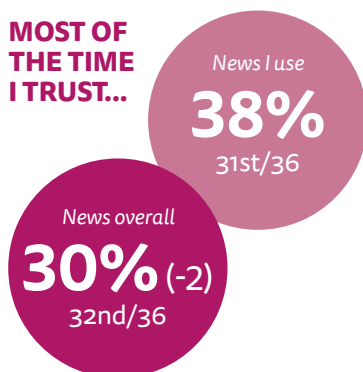
News websites in France now have more than 50% of their traffic coming from mobile. This is a result of an aggressive use of mobile notifications (20minutes.fr, lefigaro.fr, BFM online), which French mobile users seem to be especially fond of.



TRUST

Trust in the media is amongst the lowest in Europe (30%). This may reflect concerns that editorial stories can be influenced by powerful owners with business interests to protect. It might also be connected to low trust in French politics and political institutions in general, as reflected in various surveys and the weak showing of mainstream parties in the recent elections.²⁷

MOST OF THE TIME I TRUST...



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	43% (+1)	61%
2	YouTube	19% (-2)	46%
3	Twitter	9% (+1)	16%
4	Facebook Messenger	7%	24%
5	Google Plus	5% (-1)	10%

GERMANY



STATISTICS

Population	81m
Internet penetration	89%

The role of social media in promoting hate speech and so-called ‘fake news’ has become a key issue ahead of federal elections, but most Germans continue to get their news from traditional media, with television still preferred.

Germany already has some of the toughest hate speech laws in the world but the government is looking to update these rules for the social media age. It is proposing a law to force social networks like Facebook to remove false or threatening postings promptly or face fines of up to €50m (US\$54m). The issue has taken on more urgency because of concern by the country's political establishment about the spread of racist content on social media, targeting more than 1 million migrants who have arrived in the last two years. It is feared that false information or powerful memes in social media could influence public opinion during the election campaign.

Facebook has responded by increasing the number of staff based in Germany and working with the nonprofit fact-checking organisation Correctiv to identify so-called ‘fake news’ and mark disputed content within news feeds.

At the same time a number of new brands have emerged with a focus on explanatory or constructive journalism. Perspective Daily is a web magazine that publishes just one story each day with a focus on possible solutions to a specific problem. Der Kontext

focuses on a monthly in-depth web documentary explaining a complex issue.²⁸ A new public service web TV service, Funk, has also been launched to reach the younger generation with a range of programming including news.

Despite these new developments, it is striking that only 60% of our respondents – all of whom use online for other purposes – choose to access news via websites, apps, or social media weekly. This is much lower than any other country in our survey, as is the use of social media for news (29%), which has decreased by 2 percentage points in the last year. This can be partly explained by the growth of messaging apps like WhatsApp, which is particularly popular in Germany. Even so there is a danger of over-estimating the role of social media and messaging in political decision-making. Only 7% of our German respondents say it is their main source of news; less than 2% only use social media for news in a given week.

By contrast, Germans remain heavily attached to television news, especially the main public service evening news programmes, *Tagesschau* and *Heute*. While the weekly reach of television news remains relatively stable, newspaper readership has been falling steadily amongst all age groups.

Combined with the move to digital media, newspaper groups are increasingly struggling to fund large legacy newsrooms. The situation has been made worse by high usage of ad-blocking software (28%) online, especially with younger users. Several media companies are in legal disputes against providers of ad-blockers.

The appetite to pay for online news remains low in Germany (7%) but faced with declining revenue from print, publishers have been testing new approaches. *Der Spiegel*, one of the most popular brands online, launched a ‘read now, pay later’ model in June 2016. It hides some of its articles under a Spiegel Plus brand where readers are prompted to pay a small amount for the rest (€0.39 per article). Readers only pay when they reach a total of €5. *Die Zeit* has been offering free access to its premium articles (Z+) for email registration. Only later, once a certain number of items has been accessed, is a user asked to pay for a subscription.

This year's *Digital News Report* enables a deeper look at the way different brands are valued online. *Tagesschau.de* is considered best for accurate and reliable news and to understand complex matters. *Spiegel* online scores best for strong opinions and *Bild.de* performs best for amusing and entertaining content. Despite these differences, the most commonly used online media brands share a political view narrowly clustered around the political centre (see chart). There are no popular media brands espousing views at the political margins – in sharp contrast with highly polarised environments like the United States.

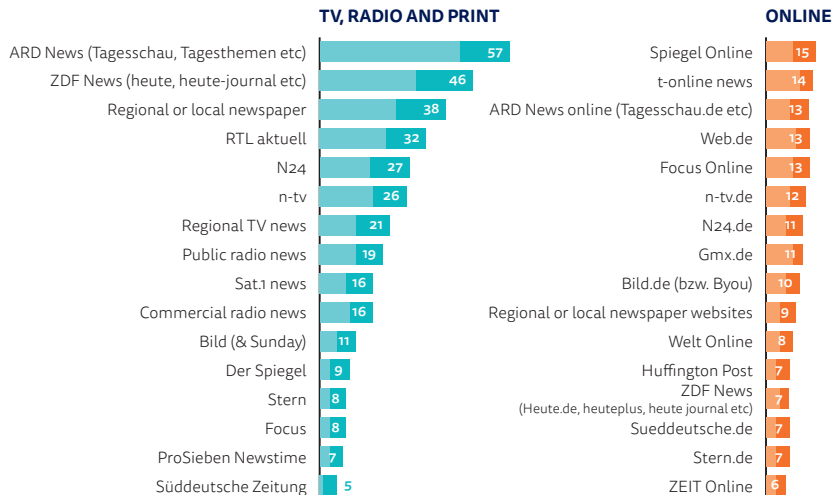
Sascha Hölzig and Uwe Hasebrink
Hans Bredow Institute for Media Research,
Hamburg

²⁸ <http://en.munich-startup.de/2015/11/25/profile-der-kontext-the-online-background-magazine>

TOP BRANDS

% Weekly usage

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



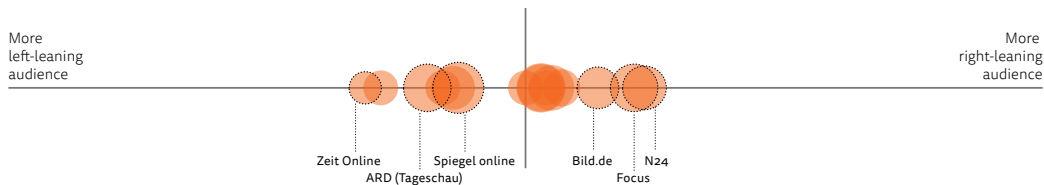
PAY FOR ONLINE NEWS



7% (-1)

(=32nd/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

28% (+3)

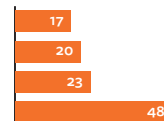
(=6th/36)

BRAND ATTRIBUTES

% of ARD users who say it is best for...

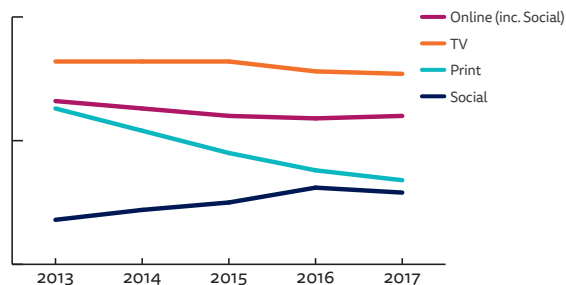
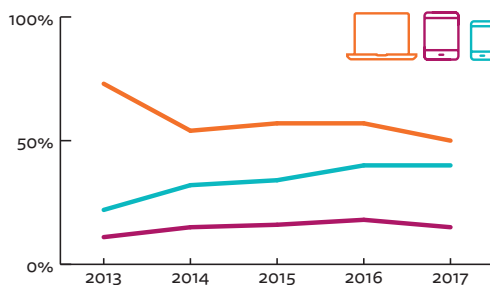


% of BILD users who say it is best for...



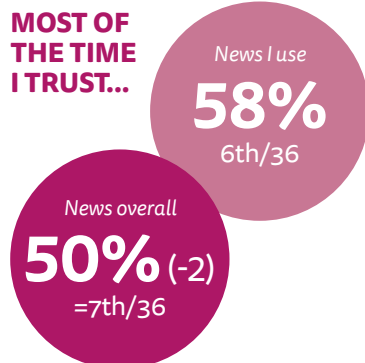
CHANGING MEDIA

Television news maintains its substantial lead over online news, a much wider gap than in other countries. Print has also declined much further and faster than in other German-speaking countries such as Austria and Switzerland. The growth in social media has stopped.



TRUST

About half of the Germans trust most news most of the time and it is widely felt to be free of political and commercial influence. Trust in the news is higher than in many countries but the media have increasingly come under criticism from the far right in particular for withholding news that might embarrass the corporatist consensus.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	25% (-2)	51%
2	YouTube	14% (+2)	49%
3	WhatsApp	12% (+2)	55%
4	Twitter	4% (-)	11%
5	Facebook Messenger	3%	20%

GREECE



STATISTICS

Population	11m
Internet penetration	65%

The media market in Greece is characterised by very low levels of trust in journalism, high use of social media for news and extreme fragmentation of the online news market.

During the past year, the traditional media market has suffered from growing commercial pressures and confusion surrounding government plans for allocating new TV licences. For decades TV licences in Greece have been handed out on a temporary basis by successive governments in an attempt to exert influence over broadcasters. The current Greek government, in an attempt to give out permanent licences, took the controversial decision to hand out just four nationwide licences, in place of the seven television stations that had been operating. Eventually, 11 licence applications were made and four were filtered out because they did not fulfil the criteria set by the government. The remaining seven applicants auctioned for four licences, spending a surprisingly large amount of money (€246m), given the poor economic outlook and declining TV market.

In October 2016, the plan for new licences was blocked by the Council of State, which argued that it bypassed the independent National Council for Radio and Television, which is constitutionally responsible for regulating the TV market. The €246m raised by the auction was returned and existing broadcasters are continuing to air programmes while awaiting a new regulatory attempt by the National Council.

On top of the controversial licencing process, the oldest and for many years the largest commercial broadcaster in Greece (MEGA) was forced to stop producing any content due to debt problems. MEGA spent much of early 2017 broadcasting reruns of TV series, attempting to repay its debt by eliminating its running costs. DOL, a large conglomerate which is a shareholder in MEGA and owns two historic newspapers and one of the largest news websites in Greece (in.gr), is also facing difficulty in repaying its considerable debts and employees have been unpaid for months. In June 2017, a shipping magnate and owner of the largest football team in Greece, bought DOL for €23m.

In the TV market, both the findings of this survey and industry TV ratings²⁹ show that SKAI increased its share during the past year (+5%), becoming the largest broadcaster, potentially because of MEGA's problems. Alpha and Antenna TV follow with similar shares to last year.

The decline in newspaper circulation has continued over the last year. Total Sunday newspaper sales have fallen by around 25% to 300,000 in the year to April 2017³⁰ compared to an average of approximately 1.2m papers sold in 2008.³¹ However, in this uncertain market, two new newspapers were launched in recent months by businesses that missed out in the process of applying for a TV licence. This further indicates that news in Greece remains largely a way of gaining political and economic influence rather than being a viable commercial industry in its own right.

While 95% of Greeks get their news online, consumption is fragmented with no brand being used regularly (more than three days per week) by more than 15% of the online population. Greeks also use more online news brands on average compared to every other country in the survey apart from Turkey. In the long-tail list of the most visited websites, alongside traditional news brands we see some news websites that regularly engage in conspiracy theories about health and political issues.

Very few Greeks are prepared to pay for online news (6%), which is not surprising given that only a handful of broadsheet newspaper websites have set up paywalls. Other reasons include the lack of credibility of news, the large decreases in personal incomes following the economic crisis, and the lack of culture of online payments in general. Ad-blockers are also at record levels in Greece (57% of Greeks below 35 use one) while high levels of offsite news consumption (69% of Greeks use social media for news) further limit monetisation opportunities for publishers. These data points portray a dystopian landscape for online news publishers in Greece.

Facebook remains the most widely used platform for news (62% use it), while 32% of Greeks use YouTube for news content. Participation via commenting and sharing news is also at high levels in Greece, an indication of the polarised political environment and mistrust in journalistic content.

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

²⁹ <http://www.arianna.gr/gr/data/current/stage4.shtm>

³⁰ <http://www.europenet.gr>

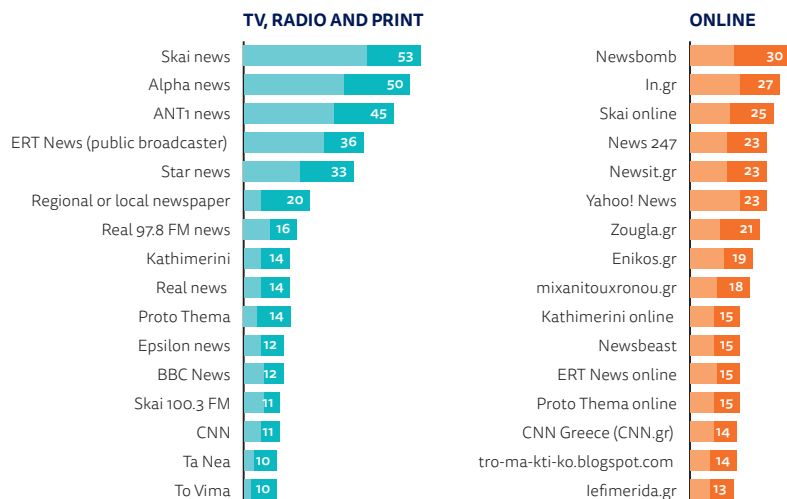
³¹ <http://s.kathimerini.gr/resources/toolip/doc/2015/03/05/12-05-2010-ethisia-enhmerwsh-analytwn-ellhnika.pdf>

³² <http://www.publicissue.gr/12356/institutions-2015>

TOP BRANDS

% Weekly usage

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

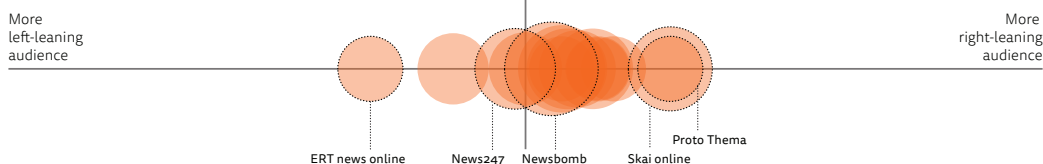


PAY FOR ONLINE NEWS



6% (-1)
(=34th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS

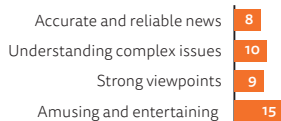


USE AN AD-BLOCKER

36% (-)
(1st/36)

BRAND ATTRIBUTES

% of Newsbomb users who say it is best for...



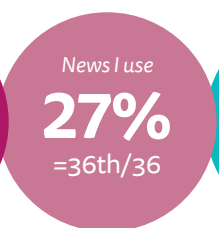
% of In.gr users who say it is best for...



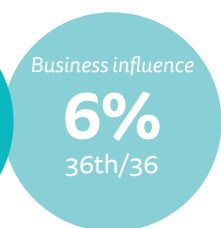
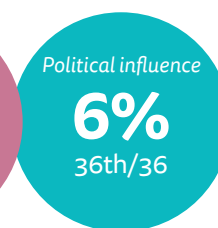
TRUST

Greeks have the lowest levels of trust in news media in our survey and the greatest concerns about business and political influence over editorial content. An annual survey of trust in institutions in Greece shows that newspapers and broadcasters faced some of the most severe increases in mistrust compared to other institutions since before the financial crisis (2007).³²

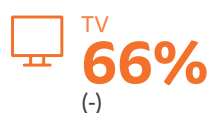
MOST OF THE TIME I TRUST...



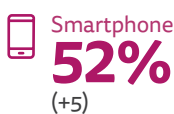
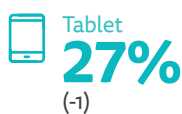
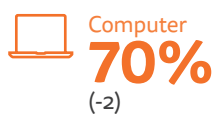
THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	62% (-6)	81%
2	YouTube	32% (-2)	77%
3	Facebook Messenger	17%	51%
4	Twitter	13% (-1)	25%
5	Viber	10% (+2)	40%

HUNGARY



In 2016 the Hungarian government intensified its attempts to tighten its control over the media through changes in ownership, distribution of state advertising, and campaigns against critical voices, external and internal.

The most dramatic event in the field of media in 2016 was the sudden closure of left-leaning newspaper *Nepszabadsag* by its owner, Mediaworks, with many suspecting political motives behind the move. The wider Mediaworks business, which included 12 of the 19 regional daily print newspapers with over one million daily readers combined, was sold to a company controlled by Lorinc Meszaros, a close friend and ally of Prime Minister Viktor Orbán. Meszaros also owns the far-right-wing television channel Echo TV, making him the second biggest media owner in the Hungarian media market.

Meanwhile the financial weekly *Figyelo* was bought and restructured by Maria Schmidt, another close associate of Viktor Orbán. One of the most popular news portals Origo has also had a change of ownership which has made its editorial coverage strongly pro-government. The acquisition of the second national commercial broadcaster, TV2 by Andrew G. Vajna, the government commissioner in charge of the Hungarian film industry, became official in early 2016. Since then, TV2's reporting has become blatantly pro-government.

Public service media have been significantly restructured since the 2011 media law. Now it is under the control of the Media Council, a body that consists entirely of members nominated by the governing party, Fidesz. MTVA (the Public Service Media Fund) operates six television channels and seven radio channels. There have been serious concerns about the lack of transparency regarding its budget, which is estimated to be approximately 80 billion HUF (US\$275m) annually. The public service media news (MTV and Hirado.hu) is strongly pro-government, with critical voices barely present and factual errors frequent.

The Hungarian online sphere is still vibrant and plural, with a wide range of political and news portals/blogs operating. Index and Origo are the two biggest online news portals in Hungary, founded in the late 1990s after legacy media struggled to adjust to the online environment. Although Origo can no longer be considered a space for independent journalism under its new ownership, critical opinion and investigative articles are produced by a number of online sites including Index, 444, and Mandiner. Partly crowdfunded watchdog NGOs and investigative journalism centres, Atlatzso and Direkt36, specialise in high-quality, labour-intensive investigative journalism. However, because of the nature of the media environment, these stories rarely get featured in the pro-government or mainstream media. This raises serious concerns over Hungarian citizens' right to be informed. Research shows that the amount of state advertising to government-friendly media outlets (such as Origo and TV2) has significantly increased in recent years.³³

STATISTICS

Population	9.8m
Internet penetration	81%

Overall most Hungarians still get their news online (89%) or via television (72%), with only around a fifth (20%) reading a printed newspaper, down 7% on last year. The closure of *Nepszabadsag* and changes of editorial stance at *Vilaggazdasag*, *Magyar Nemzet*, and *Figyelo* are arguably contributory factors.

Social media are an extremely popular source of news in Hungary, partly due to the lack of trust in traditional media sources and partly as a result of a longstanding preference for informal personal networks. Some researchers attribute this characteristic of the Hungarian society to the legacy of the socialist past. Formal institutions are considered untrustworthy by many. Low levels of trust may be driven by concerns over government control of the media and the extent of misinformation carried. But these also reflect and are exacerbated by political polarisation.

Hungarian respondents are fairly divided when it comes to what media they consume. Interestingly, two major online news portals, Origo and Index are among the least divisive media in terms of their reach to both sides of the political spectrum. Television channels (including the public service broadcaster) are mostly highly divisive.

All the major media outlets are available free of charge without paywalls and online subscriptions. NGOs and investigative journalism centres have been experimenting successfully with crowdfunding (including asking readers for donations and monthly payments), but their content is available for free.

Eva Bogнар

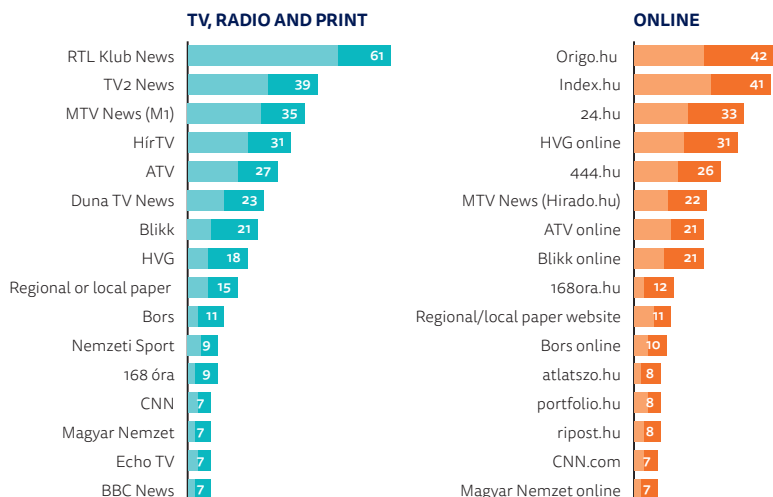
Centre for Media, Data and Society,
Central European University

³³ A. Szeidl and F. Szucs, Media Capture through Favor Exchange (2016): <https://pdfs.semanticscholar.org/a942/2fo2f6aa890261325948d05a190fa7ab4efa.pdf>

TOP BRANDS

% Weekly usage

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

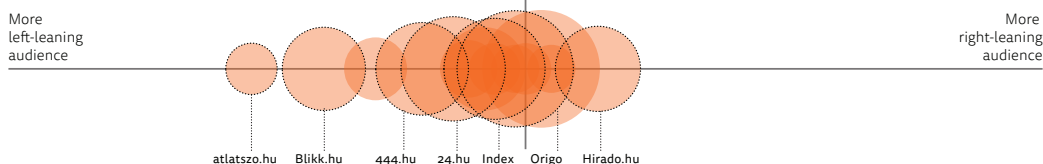


PAY FOR ONLINE NEWS



10% (+2)
(=22nd/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS

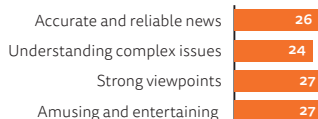


USE AN AD-BLOCKER

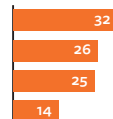
27% (+2)
(=9th/36)

BRAND ATTRIBUTES

% of Index.hu users who say it is best for...



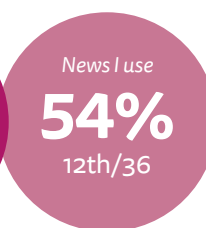
% of MTV News (Hirado) users who say it is best for...



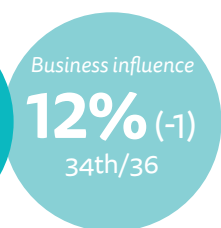
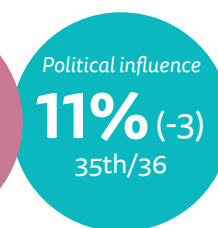
TRUST

There is significant difference between the level of trust in the news in general and in the news respondents consume (31% versus 54%), which indicates a highly polarised environment. Only 11% of respondents think the media in Hungary are free from undue political influence, which is the second lowest figure among the 36 countries included in this study.

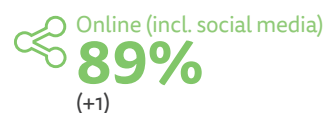
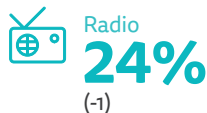
MOST OF THE TIME I TRUST...



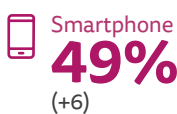
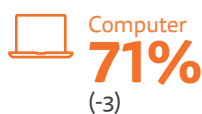
THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	64% (+4)	81%
2	YouTube	25% (+3)	72%
3	Facebook Messenger	9%	48%
4	Twitter	5% (-)	15%
5	Viber	3% (-1)	25%

IRELAND



Irish titles have increased their digital reach with revenue stabilising, while increasing numbers are consuming news on mobile phones and via closed messenger apps.

The Irish digital media market appears to be going through a phase of consolidation, with few major developments over the past 12 months. In terms of yearly comparisons, it is worth noting that data collection for the previous report occurred during the 2016 general election campaign and we may assume that the election increased interest in, and exposure to, news. Consequently, a period of consolidation with relatively small changes is to be expected.

The slow decline of TV and newspaper consumption continues, particularly among groups aged between 35 and 45. Online news consumption remains flat while mobile is down a little from last year. There is little change regarding the devices people use to access news; as in previous years, there is a slight decrease in the popularity of computers.

The major consumption shift is in the use of private messenger apps, such as WhatsApp and Facebook Messenger, which are used more prevalently in Ireland than in many other countries. Other platforms, such as Facebook and Twitter, have lost some traction for news consumption since 2015. The popularity of WhatsApp in particular has grown significantly over each of the past three years. In terms of general use, rather than specifically for news, some 40% now

use WhatsApp (compared with 24% in 2015), 37% use Facebook Messenger, 19% use Viber, and 15% use Snapchat.

In recent years, the Irish broadcasting market has undergone a number of changes. UTV was taken over twice in a ten-month period: first by ITV in October 2015 and then by Liberty Global in July 2016. In September, UTV's radio holdings were acquired by News UK. The local radio station TFXM (formerly Phantom), in which Communicorp had a stake, closed in October 2016. No other local or regional radio stations closed and no new stations were launched.

There were no closures in the newspaper sector. However, comparing the last six months of 2016 with the same period a year earlier, all major news titles suffered a decline in circulation. The two major broadsheets, the *Irish Times* and the *Irish Independent*, were both down 10%.³⁴ In September 2016, Independent News and Media announced their intention to acquire the regional newspaper group Celtic Media. However, the acquisition remains under review.

Although overall print sales declined by around 6%, there is strong growth for digital editions. The *Irish Times* Digital Edition, a digital replica of the daily newspaper, doubled its readership between the first half of 2015 and the first half of 2016. Maintaining the metered paywall model, new subscription packages were introduced in February 2015. Independent News and Media increased their digital revenue by around 20%, which goes some way to offset the continued decline in print advertising.

STATISTICS

Population	4.9m
Internet penetration	94%

Within the digital-only sector, Maximum Media, owners of *Her.ie* and *Joe.ie*, are expanding into the UK market while moving away from their original online magazine formats in favour of video and podcast content. More broadly, the central debates about digital media in Ireland concern the circulation of fake news, particularly in relation to the UK's European Union referendum and the US presidential election.

Fake news and misinformation received considerable attention by all major newspaper titles, with over 100 stories addressing the issue between October 2016 and March 2017. In addition, a very small right-wing site, *theliberal.ie*, was accused of manufacturing news on race riots, among other controversies, and is currently the subject of legal action.³⁵

Another major issue concerns the role of the Irish data protection commissioner in protecting the privacy of European citizens. The court case *Data Protection Commissioner v. Facebook Ireland Limited & Maximilian Schrems* concluded on 15 March 2017, but judgment was reserved for a later date. In these proceedings, a reference is sought to the Court of Justice of the European Union concerning the validity of allowing the transfer of personal data from the EU to the US.

Jane Suiter
Dublin City University

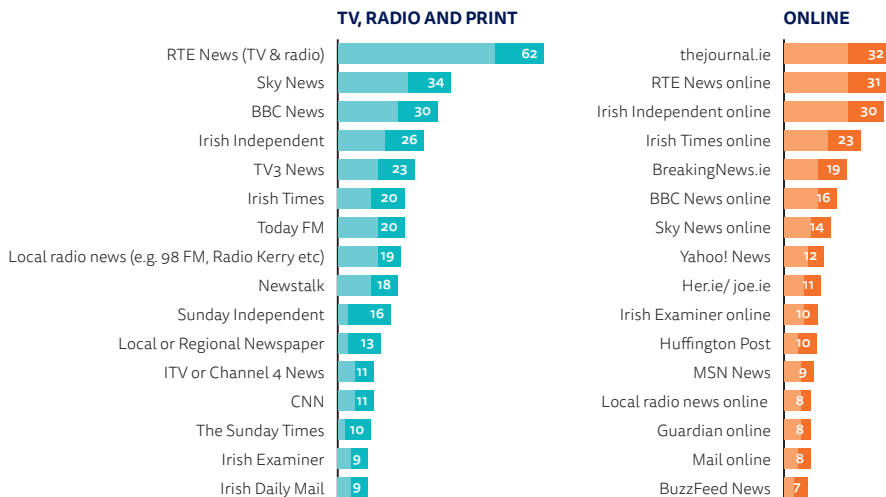
³⁴ <http://newsbrandsireland.ie/data-centre/circulation>

³⁵ <http://www.irishtimes.com/news/crime-and-law/courts/district-court/copyright-cases-against-theliberal-ie-owner-leo-sherlock-adjourned-1.3008413>

TOP BRANDS

% Weekly usage

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

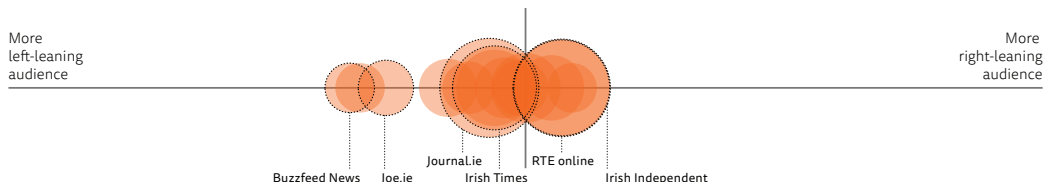


PAY FOR ONLINE NEWS



9% (-)
(=25th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

29% (-1)
(5th/36)

BRAND ATTRIBUTES

% of RTÉ News users who say it is best for...

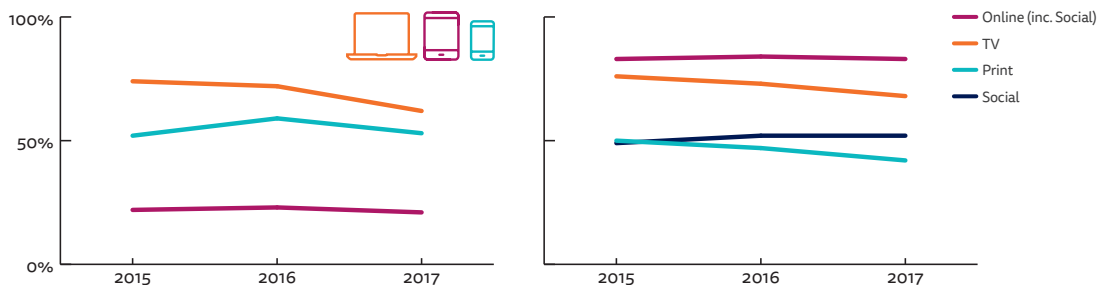


% of thejournal.ie users who say it is best for...



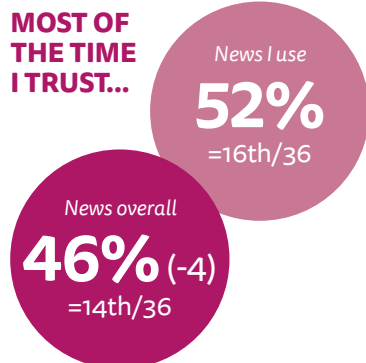
CHANGING MEDIA

Online media remain dominant and stable. The continuing slow decline of print and TV news consumption has been evident for the past three years. This decline is particularly notable in terms of TV consumption amongst under 45 age groups.



TRUST

Trust in the news has declined a little and from a fairly low base over the past year. This is perhaps not surprising given the extent of debate about 'fake news' following the US presidential election and Brexit referendum. Notably, however, the fall is not as steep as in the UK.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	41% (-4)	68%
2	YouTube	18% (+1)	58%
3	Twitter	11% (-2)	23%
4	WhatsApp	11% (+4)	40%
5	Facebook Messenger	7%	37%

ITALY



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

TV news bulletins remain the main source of information for Italians, although the internet is growing in importance because of the role of social media and smartphones in discovering and consuming news.

The TV market remains highly concentrated. Almost 90% of overall revenues are generated by just three main operators: the pay-TV Sky Italia (33%), the commercial group Mediaset (28%), and the public broadcaster RAI (28%). In contrast to the decline of the print sector, Italian TV advertising revenues were stable in 2015.³⁶

Newspaper readership has always been low in Italy and the press landscape consists of commercially weak quality papers addressing an elite and politically defined audience. The weakness of the Italian press has fostered its reliance on external sources of financing, such as public subsidies and private business sponsorship, which has made it somewhat subject to both political and economic influence. Newspaper circulation in Italy has decreased from more than 6 million copies per day in 2000 to a little more than 2.5 million in 2016.³⁷ The two main players, Gruppo Espresso, which publishes *La Repubblica*, and RCS, which publishes *Il Corriere della Sera*, together account for about 40% of the sector revenue.³⁸

There have been a number of significant developments in the publishing sector over the last year. The Italian anti-trust authority approved Gruppo Espresso's takeover of ITEDI, which publishes *La Stampa* and was previously owned by car-maker Fiat Chrysler. Business tycoon Urbano Cairo, who already owned the commercial TV channel La7, has now taken control of the publishing group RCS. Finally, *Il Sole 24 Ore*, the business newspaper owned by Confindustria (the Italian employers' federation), is facing a difficult economic situation and legal troubles because of an investigation into suspected fictitious registration of digital subscriptions.

The online news market is still dominated by legacy players. The websites with the widest online reach are those of the main newspapers (*La Repubblica*, *Il Corriere della Sera*, *Il Fatto Quotidiano*), the main commercial TV broadcasters (the Mediaset's TgCom24.it and SkyTg24), and the main news agency (ANSA). The RAI's news service has slightly increased its online reach, but it still far from matching its extensive reach via radio and television. The public service operator has recently launched a video-on-demand platform, RaiPlay, that is mainly focused on entertainment and has already generated positive audience results. However, the RAI's plan to reform its news departments and to enhance its digital news service was delayed by internal disagreements.

Portals like Yahoo News, Notizie.Libero, and MSN news are still widely used along with a few second-generation digital-born outlets, especially the Huffington Post Italia (which is a joint-enterprise with Gruppo Espresso)

STATISTICS

Population	62m
Internet penetration	63%*

and Fanpage (a digital start-up that makes an effective use of social media for distributing its hard and soft news content). Other digital-born outlets, such as *Il Post* (5%), *Dagospia* (5%), *CityNews* (4%), *Linkiesta* (3%), *Lettera43* (3%), and *Blogo* (2%), generate limited audience results, as does *BuzzFeed News* (2%).

Data on brand attributes show how different types of Italian outlets fulfil diverse needs of their audiences. More politicised outlets such as *Ilfattoquotidiano.it* and, partially, *Repubblica.it* are especially valued for their strong opinions; ANSA, a rare example of news agency that has attracted significant online reach, is particularly valued for accuracy; finally, the digital-born player Fanpage is mainly appreciated for its amusing and entertaining content.

Despite the recent adoption of paywall solutions by some Italian outlets (e.g. by *Il Corriere della Sera*), the number of people who pay for online news remains relatively low (12%). WhatsApp use for news has risen from 20% to 24%.

In early 2017, following the public discussion about fake news, steps are being taken to combat its impact. First, the website of a blogger close to Beppe Grillo's party, 5 Stars Movement, was accused of misleading its users and excluded by the Google AdSense network.³⁹ Second, a bill to tackle fake news websites was presented for discussion in the Parliament by the MP Adele Gambaro. The bill establishes fines up to €10,000 and two years' imprisonment for websites that publish fake news. However, the proposed legislation faced criticism for lacking a clear definition of fake news.

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³⁶ <https://www.agcom.it/documents/10179/7278186/Comunicato+stampa+21-03-2017/c5e2e035-02aa-49b4-a590-c7a55ece7bc3?version=1.0> ³⁷ Ibid. ³⁸ Ibid.

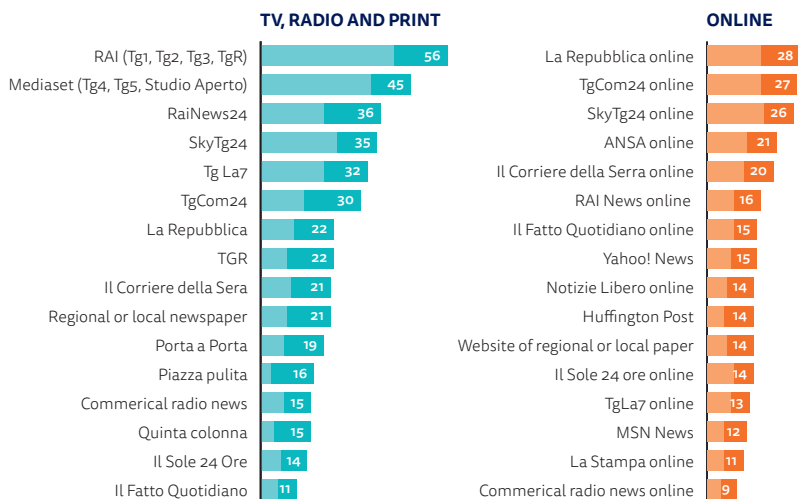
³⁹ http://www.ilblogdellestelle.it/la_liberta_della_rete_sopra_ogni_cosa.html (see also <http://www.primaonline.it/2017/01/29/252685/fake-news-google-toglie-la-pubblicita-a-byoblu-il-sito-di-claudio-messora-per-il-blog-di-grillo-e-un-attentato-alla-liberta-della-rete>)

* Internet penetration data from 2016.

TOP BRANDS

% Weekly usage

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



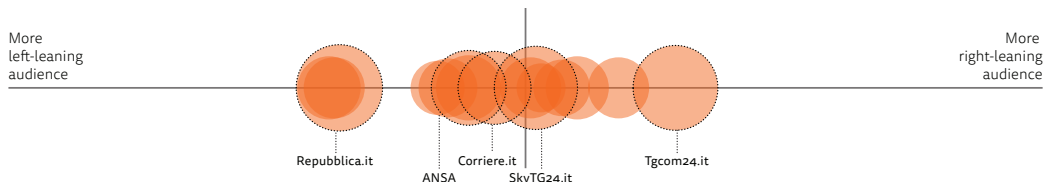
PAY FOR ONLINE NEWS



12% (-4)

(=16th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



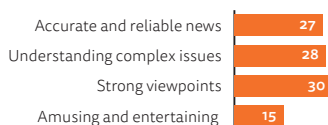
USE AN AD-BLOCKER

20% (-)

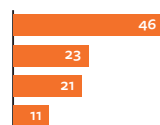
(=30th/36)

BRAND ATTRIBUTES

% of Repubblica.it news users who say it is best for...

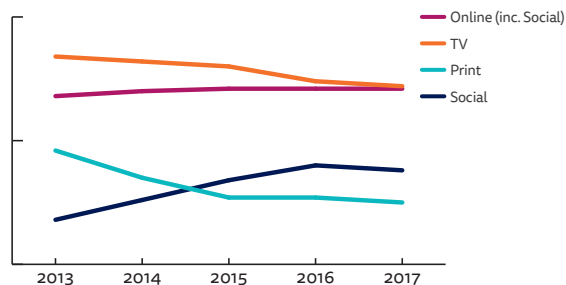
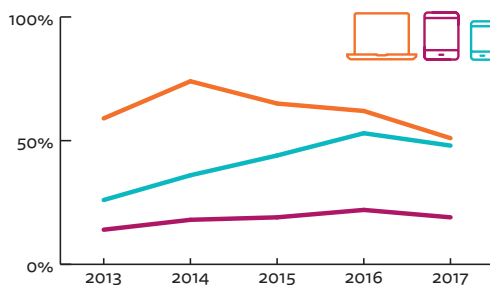


% of ANSA news users who say it is best for...



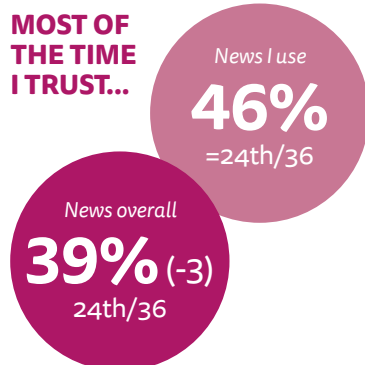
CHANGING MEDIA

Television remains the main source of news for most Italians, especially when you take into account the relatively low internet penetration compared with other European countries. Older people still rely on traditional news sources, with the young preferring online and social media.



TRUST

The partisan nature of Italian journalism, combined with the strong political and business influence on news organisations, has led to particularly low levels of trust in the news. The debate on fake news is also vigorous in Italy, where in early 2017 a website has been excluded by the Google AdSense network and a bill to combat fake news websites has been presented for discussion in the Parliament.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	51% (-3)	72%
2	WhatsApp	24% (+4)	66%
3	YouTube	22% (-)	61%
4	Twitter	10% (-)	22%
5	Facebook Messenger	6%	31%

NETHERLANDS



The Dutch media environment is characterised by strong public service media, relatively high-quality commercial news organisations, and continued digital innovation.

Dutch news organisations continue to focus on digital innovation, with the two most recognisable digital-only initiatives growing and expanding. De Correspondent, a well-regarded start-up, which bills itself as an antidote to the daily news grind, has grown from 20,000 paying members at its launch in September 2013 to 56,000 in March 2017. It also announced plans for a launch in the United States. Aggregated pay-per-article (micropayment) platform Blendle doubled its registered users and increased its number of paying accounts by 60% in 2016, according to its founder.⁴⁰ Blendle also launched a new premium product, which offers a daily selection of 20 articles for €9.99 per month. This caused quality paper NRC to stop using Blendle's services, citing the latter's move from additional service to a distribution platform and therefore from a collaborator to a competitor. Follow The Money, which bills itself as a radical investigative journalism initiative, introduced a paywall. Surviving on membership and donations, it aims to gain enough subscribers to guarantee financial independence in the long run. Journalism, a platform for crowd-funded investigative reporting launched in 2014, dissolved.

Legacy news organisations also continue to innovate. Most notably, publishing house De Persgroep launched Topics in the Netherlands, giving subscribers to any of their Dutch and Belgian titles unlimited access to the content of all of them.

Print circulation continues to decline. Popular broadsheets *De Telegraaf* and *Algemeen Dagblad (AD)* retain a bigger circulation than all quality newspapers combined, but face a steeper decline (-8% and -6%) than their quality counterparts *Het Financieele Dagblad* (-1%), *Trouw* (-2%) and *De Volkskrant* (-3%). Total digital circulation continues to grow. Quality newspapers *De Volkskrant* (90k) and *NRC* (66k) outnumber *De Telegraaf* (44k) and *AD* (34k) in terms of digital subscribers.⁴¹

Public service broadcaster NOS continues to dominate the offline news market (70%), followed by commercial broadcaster RTL (34%). Online, NOS (30%) is second only to Nu.nl (38%). Remarkable surges in ratings were seen by daily talk show Jinek and weekly news satire Lubach op Zondag. The latter generated worldwide attention when a clip introducing the Netherlands to Donald Trump went viral.⁴²

A controversial Media Act was weakened after opposition parties worried the independence of public service media (PSM) would be jeopardised. The amended law assured politics would have no say in appointing the board of PSM's governing body NPO, and the NPO board would have no say in presenters, guests, topics, or specifics of form or content supplied by the various public broadcasters.

STATISTICS

Population	17m
Internet penetration	96%

As a result of decreasing resources leading to smaller newsrooms and a bigger dependency on freelancers, two-thirds of Dutch editors-in-chief report they fear a higher risk of violation of editorial independence than five years ago. In particular, they expect an increasing pressure to align their editorial choices to the preferences and wishes of the public.⁴³

In the Netherlands, fake news is more media hype than real challenge, with little serious concern about its impact. Half of our Dutch online sample (51%) trust news overall (= 5th/36), while 62% trust the news they themselves are using (2nd/36). Furthermore the Netherlands is in second place (2nd/36) agreeing that news is free from both undue political and undue commercial influence. A comparison of users' trust between top news sites illustrates these figures. Users rate public broadcaster site NOS.nl high on accuracy (56%) and explanatory power (41%). 34% of the users of commercial news site NU.nl judge it as most accurate and 27% think it is best for understanding complex issues. Dutch news blog *GeenStijl*, which describes itself as 'tendentious, unfounded and needlessly offensive', is used more often than websites of quality newspapers *NRC* and *Trouw*, but 40% see it as entertainment rather than as an accurate news source (11%). *De Dageraad* (The Daily Standard) – referred to as the Dutch Breitbart – appears to be a negligible player.

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Vrije Universiteit Amsterdam

⁴⁰ <http://www.marketingfacts.nl/berichten/analyse-blendles-groei-in-nederland-stagneert>

⁴¹ <https://www.svdj.nl/de-stand-van-de-nieuwsmedia/oplage-2016-telegraaf-grote-verliezer-trouw-en-fd-bijna-stabiel> and <https://www.svdj.nl/nieuws/digitale-dagbladverkoop-blijft-groeien>

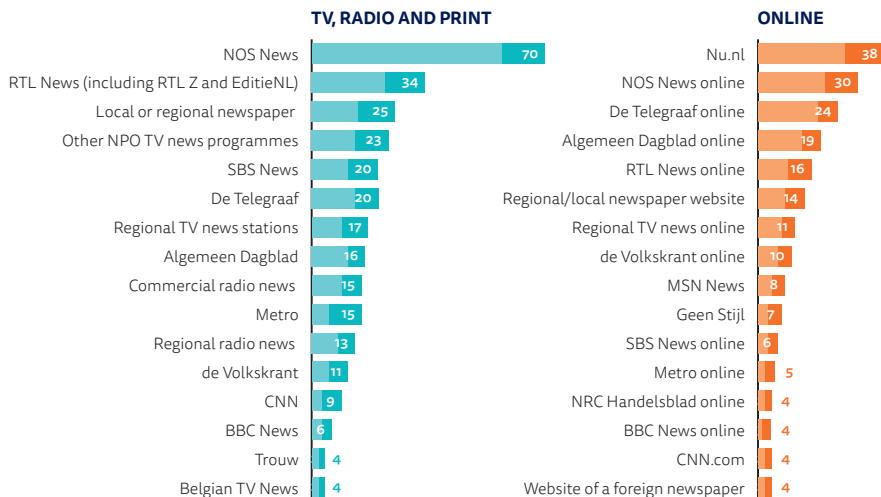
⁴² <https://www.youtube.com/watch?v=ELD2AwFN9Nc>

⁴³ <http://www.mediamonitor.nl/analyse-verdieping/onafhankelijkheid-van-nieuwsredacties-2015>

TOP BRANDS

% Weekly usage

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



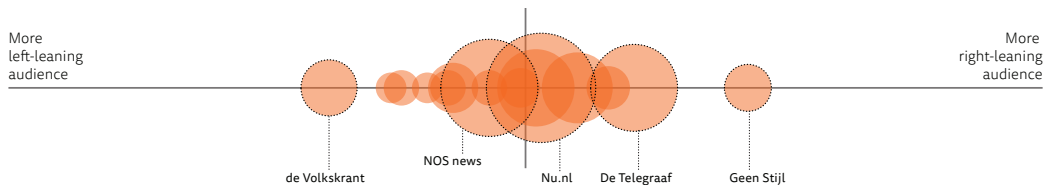
PAY FOR ONLINE NEWS



14% (+2)

(=12th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



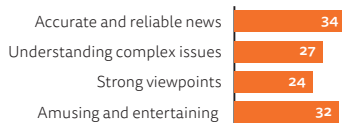
USE AN AD-BLOCKER

22% (+2)

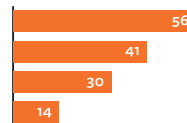
(=27th/36)

BRAND ATTRIBUTES

% of Nu.nl users who say it is best for...

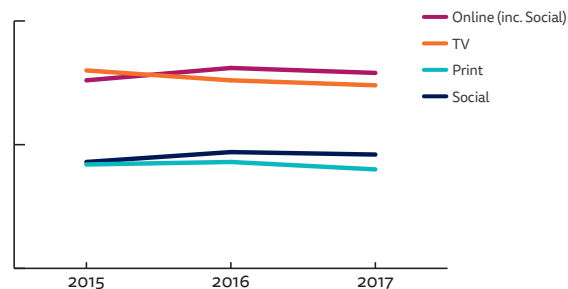
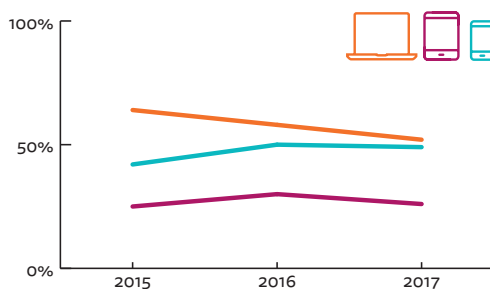


% of NOS users who say it is best for...



CHANGING MEDIA

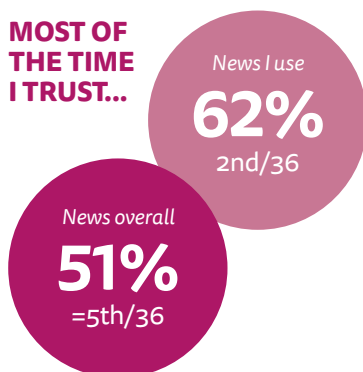
Online (79%) has overtaken television news (74%) over the last three years as a source of news while the smartphone (49%) is fast becoming the most important access point. Tablet use for news is declining.



TRUST

Trust in news remains comparatively high in the Netherlands, which might be due to a low presence of tabloid news media and a pluralistic system of public service media and relatively high-quality commercial news brands. The country ranks amongst the highest in perceived freedom from undue political influence and commercial influence.

MOST OF THE TIME I TRUST...



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	32% (-4)	62%
2	WhatsApp	15% (+1)	63%
3	YouTube	14% (+3)	49%
4	Twitter	8% (-)	15%
5	Instagram	4% (+1)	21%

NORWAY



The Norwegian media landscape mixes strong national publishers and public service media with a reputation for innovation in content and business models.

Norwegians' main news sources are a combination of the publicly funded broadcaster (NRK), the nationwide commercial TV channel TV2, leading quality newspaper *Aftenposten*, and tabloids *VG* and *Dagbladet*. However, local and regional newspapers remain important for many Norwegians – in print as well as online.

NRK remains the most used provider offline, in a market where both TV news and print newspapers are falling significantly. In terms of online media, tabloid news brands dominate, with *VG* reaching over half (55%) of Norwegians each week, although digital-born actors also feature in the top ten (*Nettavisen* and *ABCNyheter*).

Almost nine in ten (87%) Norwegians use online news weekly, one of the highest figures in our survey, with user patterns shifting rapidly from computers to smartphones. Social media are used as a source of news for many, with Facebook still ahead in an increasingly saturated market. Meanwhile Snapchat has significantly gained popularity with under 35s in Norway for messaging, but also for news. Due to the high penetration of Snapchatters in Norway, the company launched one of the first non-English-speaking Discover news channels with tabloid *VG* in January 2017. NRK has also experimented with youth-

oriented content on Snapchat, e.g. during the US election.

Meanwhile Facebook's decision to remove a journalist's posting of an iconic war photo (Napalm Girl) because it breached its rules on nudity led to accusations of censorship and a global outcry. *Aftenposten* dedicated its front page to an open letter to Facebook's Mark Zuckerberg, which was supported by the Norwegian Prime Minister, and eventually led Facebook to back down. This debate about the perceived arrogance of US tech giants as well as the power held by Facebook (and Google) in the advertising market, has re-energised attempts by the Norwegian media industry to create an alliance for ad sales as an independent alternative. However, in early 2017, local news owner Amedia opted to stick with Google's ad solutions, for the moment at least.

Trust has been high on the agenda, especially following the political changes in the UK and US, with commentators and politicians also in Norway using the term 'fake news' in vague references to adversaries, or in criticism of journalistic reporting. In March 2017, NRK joined forces with *Dagbladet's* owner and the Tinius Trust to launch a non-commercial initiative to combat fake news across media and online outlets, staffed by journalists. This signals a new climate of collaboration in the Norwegian media landscape.

Norwegians remain world leaders in persuading people to pay for online news. The strong tradition for print newspaper reading has facilitated a transition to digital subscriptions through hybrid solutions

STATISTICS

Population	5.1m
Internet penetration	96%

(access to both paper and digital content). An example is Amedia's local newspapers that now have the majority of their subscribers using the hybrid version, as well as a 6.2% growth in digital subscriptions over the last year. But this increase has not sufficiently compensated for the loss of advertising revenue, so cost and staff cuts have continued across newspapers, as well as in TV2, this year. One new initiative that has gained attention is *Broen.xyz*, headed by a former Schibsted regional newspaper editor. The site is envisioned as a Nordic provider of news and commentary, based on a membership model with free as well as pay options.

In media policy, a major report on media diversity by a commission which included major stakeholders, was submitted in March 2017. It laid out ambitious proposals to revamp existing support schemes and add new ones to help fund journalism through the digital transition. Proposed measures include a new, temporary exemption from the employers' social security contribution for news companies, as well as tweaks to the VAT exemption to accommodate new business models (such as single-article sales and niche news publications).

While the publicly funded NRK does see some pressure concerning the scope of the remit as well as the funding model, compared to European counterparts, the Norwegian institution enjoys high legitimacy and broad political support.

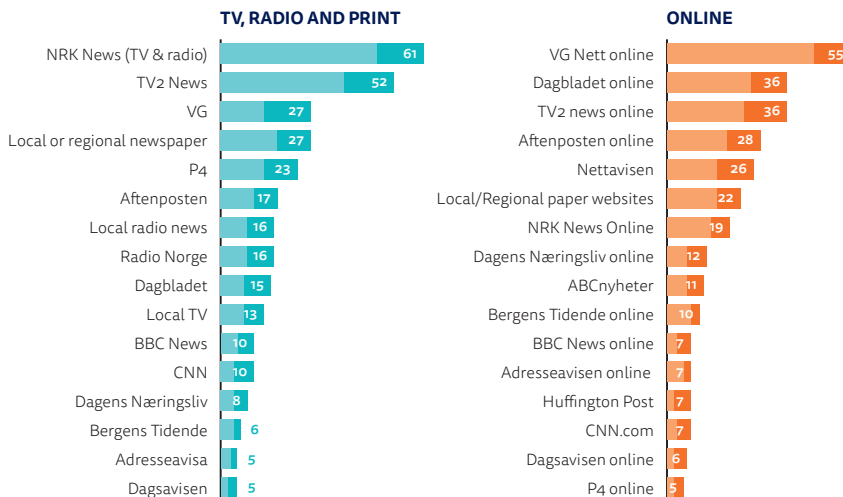
FM radio will be switched off and replaced by DAB+ and online distribution. The switch-off between the two started in the northern part of Norway in January and is expected to be complete nationwide by fall 2017.

Hilde Sakariassen and Hallvard Moe
University of Bergen

TOP BRANDS

% Weekly usage

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

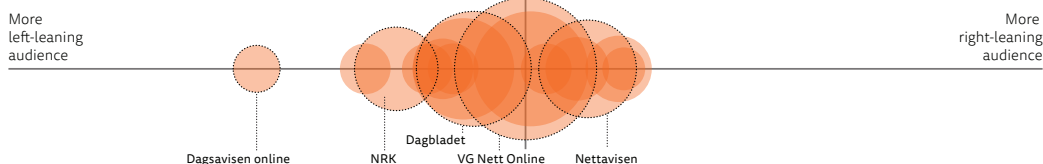


PAY FOR ONLINE NEWS



26% (-1)
(1st/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

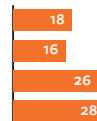
23% (-)
(=22nd/36)

BRAND ATTRIBUTES

% of NRK users who say it is best for...



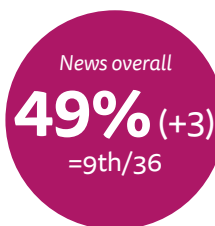
% of VG users who say it is best for...



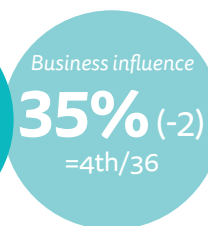
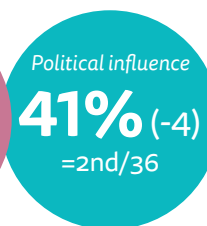
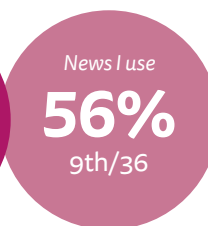
TRUST

In Norway trust in the news overall is slightly up on last year. Our survey backs up other research that indicates distrust is unevenly distributed, with those having a political affiliation to the right as well as a critical stand towards immigration showing the lowest levels of trust. Under 35s are also significantly less likely to trust the news media.

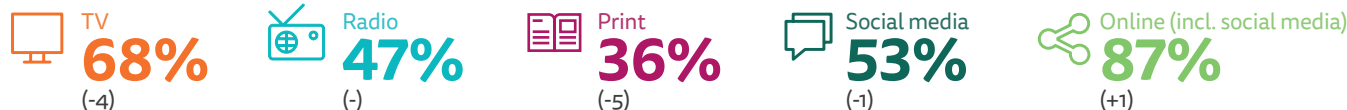
MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	41% (-4)	75%
2	YouTube	10% (+1)	54%
3	Facebook Messenger	10%	49%
4	Twitter	6% (-1)	15%
5	Snapchat	5% (+1)	37%

POLAND



The Polish media environment is characterised by a highly competitive broadcasting sector and a group of large web portals. A political crisis has been driving interest in news since the elections in 2015 but has shaken the market too, as the conservative government has attacked both public and private media.

Despite mass street demonstrations supporting freedom of the press, the ruling Law and Justice party introduced a new bill on public radio and television in early 2016. The bill let the government seize direct control over the broadcasters, and purge their newsrooms (nearly 230 journalists have been sacked or have left in protest⁴⁴). Radical changes in programming followed, with accusations of turning news shows into the government's 'fake news' factories.

Viewers might have noticed the change, as their media diet appears to have shifted. According to Nielsen Audience, in 2016, the main state channels TVP 1, TVP 2, and TVP Info lost up to 10% of their average daily viewing shares vs. 2015, and up to 17% of viewers aged 16–49 – a major concern for advertisers (Polish state media is funded both by licence fees and advertising). The privately owned broadcasters have benefited, at least for now, as Polsat has taken over from TVP 1 as the most-watched general interest station, and TVN 24 has taken over from TVP Info as the top news channel.

State institutions and state-controlled advertisers have cut subscriptions and advertising spend in media outlets critical of the government, e.g. in *Gazeta Wyborcza*, the leading quality daily newspaper.⁴⁵ Late in 2016, its publisher, Agora, laid off nearly 200 employees. These political pressures have dealt another blow to press publishers who had already been struggling with declining circulation and shrinking advertising revenues (e.g. all the national dailies have lost over 50% of print copy sales since 2007, according to ZKDP data).

Driven by anti-German sentiment, the Law and Justice party unveiled plans for another bill that would limit the share of foreign capital in the media business. So-called 'repolonisation', if enforced, could threaten investments of Ringier Axel Springer (an owner of the largest internet portal, Onet, and the biggest tabloid, *Fakt*), and Verlagsgruppe Passau (a publisher of most regional newspapers and web portals across Poland via its subsidiary, Polska Press).

Many news consumers seek refuge online. Weekly episodes of *Ucho Prezesa* (The Chairman's Ear), a political satire show launched on YouTube, featuring the Law and Justice party leaders, achieve up to 8.5 million views. For comparison, the most popular TV broadcast of 2016, live coverage of the Poland vs. Portugal football match, attracted 8 million people. New startups *Oko.Press*, *BiqData.pl* (by *Gazeta Wyborcza*) and *TruDat* (run by *NaTemat.pl*, a news portal) have pursued bold journalistic investigations, as well as verified statements by politicians and debunked fake news in the media.

STATISTICS

Population	38m
Internet penetration	68%

Online outlets have become the main source of news in the country in recent years, our survey confirms. Web portals like Onet and *Wirtualna Polska* reach half of the online population. Last year, the main portals invested heavily in original video production, hiring top talent from television and experimenting with new interactive formats like the morning live show *Onet Rano*. Aiming to further erode the business of large broadcasters, *Wirtualna Polska* and Agora (owner of a *Gazeta.pl* portal, besides its flagship newspaper's site *Wyborcza.pl*) have also launched new terrestrial digital TV channels.

Some newspapers have recently crossed milestones unimaginable a few years back, e.g. *Gazeta Wyborcza* reported 100,000 active digital-only subscribers at the end of 2016. Popular bloggers have been testing paid content models too, with the launch of *Patronite.pl*, a crowdfunding platform for story-tellers. Meanwhile, many journalists have been excited by the success of *Finansowy Ninja* (Finance Ninja), a self-published book and a webinar project, by Michal Szafanski, a journalist turned a full-time blogger, who reported a €300,000 profit after eight months. Compare this to the median annual salary for a journalist in Poland of around €10,000.⁴⁶

Grzegorz Piechota

Research Associate, Harvard Business School

⁴⁴ Towarzystwo Dziennikarskie tracks purges in public radio and television in its "Good change" in media' online feature at <http://towarzystwodziennikarskie.org> (accessed Apr. 2017).

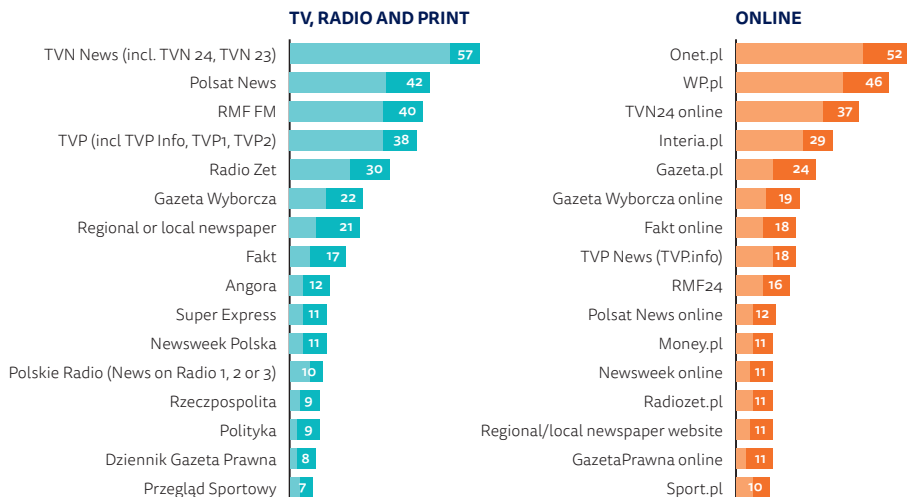
⁴⁵ Neil Buckley, Long-Term Polish Dissident Braced for Fresh Battle. *Financial Times* (27 Jan. 2017): <https://www.ft.com/content/f419ee4a-e3ab-11e6-9645-c9357a75844a> (accessed Apr. 2017).

⁴⁶ Statistics from Sedlak & Sedlak HR firm.

TOP BRANDS

% Weekly usage

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



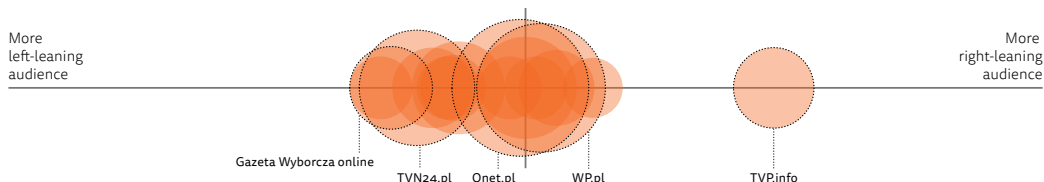
PAY FOR ONLINE NEWS



16% (-4)

(=7th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



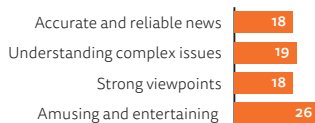
USE AN AD-BLOCKER

32% (-6)

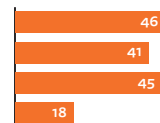
(2nd/36)

BRAND ATTRIBUTES

% of Onet.pl users who say it is best for...

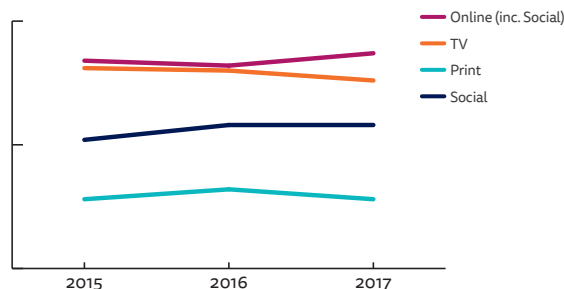
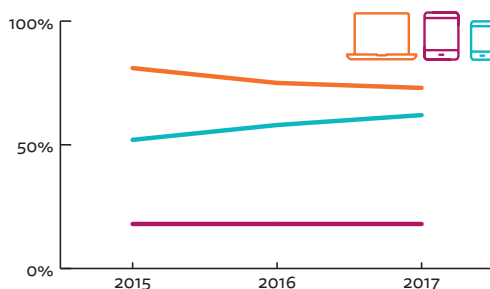


% of TVN24.pl users who say it is best for...



CHANGING MEDIA

Polish audiences still rely on the computer and on portals more than smartphones when compared with other Europeans. Perhaps as a result new mobile messaging apps are also less popular than elsewhere.



TRUST

Although polarised and increasingly partisan, the news media in Poland continue to be trusted by the public. First, many journalists and outlets are transparent about their world-views and motives, and attract audiences who think alike. Secondly, the public might respect journalists' role in holding those in power into account at a time of erosion of other democratic institutions.

MOST OF THE TIME I TRUST...

News I use
60%
=3rd/36

News overall
53%
4th/36

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	53% (+3)	73%
2	YouTube	32% (+1)	67%
3	Facebook Messenger	10%	32%
4	Twitter	9% (-)	16%
5	Google Plus	7% (-2)	15%

PORTUGAL



The Portuguese media landscape continues to be characterised by a high reliance on television news – and by an increasingly concentrated radio and print sector struggling to remain relevant in a digital world.

Five media groups control the majority of news production and distribution in Portugal, three of them with a strong TV presence: RTP (the public broadcaster), Media Capital (owned by PRISA, with TVI channels and several radio stations), and IMPRESA (SIC TV channels and the *Expresso* newspaper). The remaining two groups have strong roots in print. Global Media is the owner of two newspapers, *Diário de Notícias*, and *Jornal de Notícias*, along with TSF radio. Cofina owns the *Correio da Manhã* newspaper, which has recently moved into TV with a cable channel of the same name, as well as *Negócios*, the leading business print title.

Also of note is the presence of Rádio Renascença and RFM, both of which are of Catholic inspiration and run one of the leading entertainment broadcast channels (RFM) and one with a strong presence in news radio (RR).

This year's survey shows the continuing dominance of the main TV, radio, and print brands, namely the two private sector television channels (SIC and TVI), followed by the public broadcaster (RTP). In the online space, legacy brands share the top spot with internet news brands like *Notícias ao Minuto* and SAPO, a portal owned by Portugal Telecom (PT) which showcases

content from a range of legacy media companies.

The business sector has seen the biggest upheaval in the last year with the closure of one of the oldest business print dailies, *Diário Económico*, and the birth of two new online newspapers: *Jornal Económico* and *ECO*.

Most media companies are in a difficult financial position after years of economic recession (2011–15), low stock market capitalisation, and a high exposure to debt. In the first nine months of 2017, the three biggest Portuguese media groups (Cofina, Media Capital, and Impresa) had a total debt of over €371m.

In Portugal, newspapers like *Público*, *Correio da Manhã*, and *Diário de Notícias* operate a range of paywall models, but willingness to pay for online news is low and the majority of revenue still comes from advertising. Some new digital-born publishers like *Observador* have been experimenting with branded and sponsored content – as well as trying to persuade readers to turn off ad-blockers. Some of the main recent news innovations in Portugal have been sponsored by the Digital News Initiative, a partnership between Google and European news publishers.

The 2017 report *Journalists: Working Conditions and Changing Jobs* showed that over half (57%) of Portuguese journalists earn less than €1,000/month, and almost 12% earn less than €500/month. In addition, around a third (34%) have precarious work conditions, and no employment contract. Around two-thirds of journalists (64.2%) surveyed have thought, at least once, about leaving the profession.⁴⁷

STATISTICS

Population	10m
Internet penetration	68%

Declining advertising revenues combined with high levels of debt could raise serious questions about the independence of the media in general. Despite this, Portuguese citizens tend to continue to have high levels of trust in the media and in journalism. The phenomenon of 'fake news' has been widely debated in the media, but there are few local examples in a political system marked by low levels of political polarisation. One interesting development around trust has been the growth of social media pages, such as *Os truques da imprensa portuguesa*, that act as a watchdog on the mainstream media. Other watchdogs with social influence include the *Barómetro de Notícias*, focusing on a weekly report on media headlines and social media and the monthly report on opinion makers and political commentary in *News Channels*, both based at ISCTE-IUL.

Online brands attributes provide information about the ways in which these are valued differently. *SIC Notícias* and *Público* (27%) are considered by their users best for accurate and reliable news. By contrast SAPO, TVI, and *Correio da Manhã* (25%) are valued most for amusing and entertaining coverage.

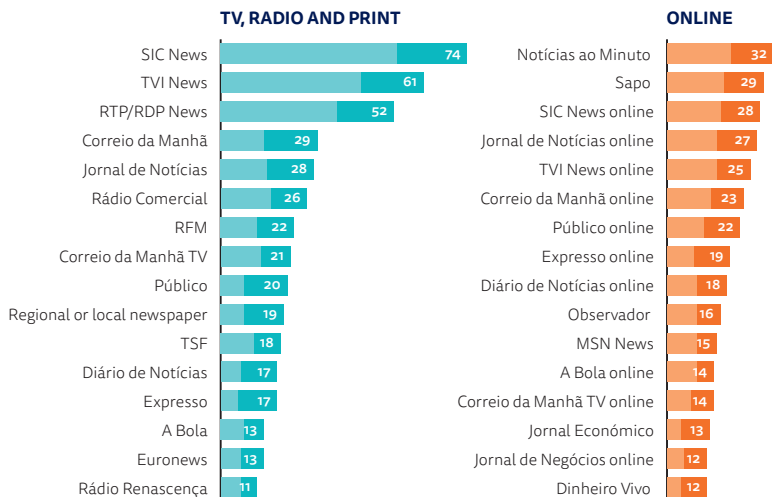
Ana Pinto Martinho and Gustavo Cardoso
ISCTE University Institute of Lisbon

⁴⁷ Cardoso, G., et al, 2017, *Journalists: Working Conditions and Changing Jobs*, OberCom.

TOP BRANDS

% Weekly usage

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

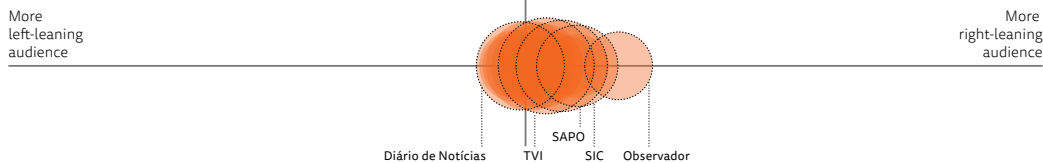


PAY FOR ONLINE NEWS



9% (-)
(=25th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS

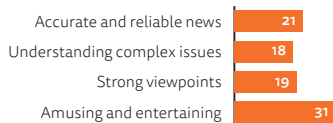


USE AN AD-BLOCKER

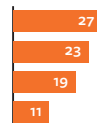
28% (+2)
(=6th/36)

BRAND ATTRIBUTES

% of SAPO users who say it is best for...

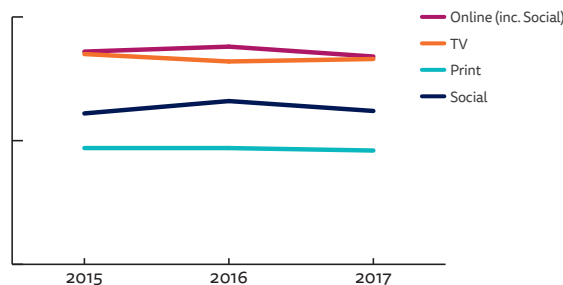
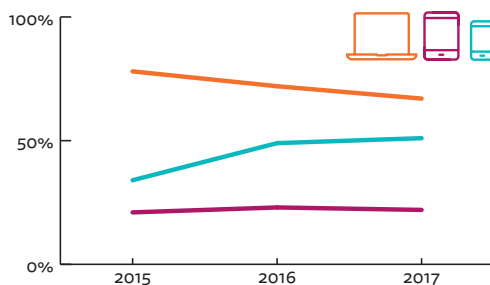


% of SIC Notícias users who say it is best for...



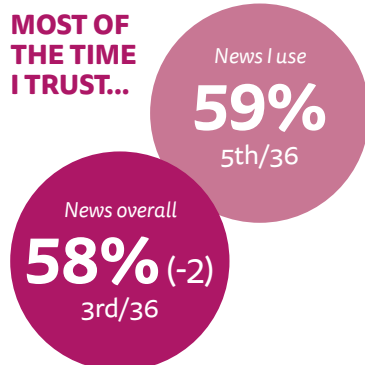
CHANGING MEDIA

TV, as a source of news, remains more important in Portugal than in many other countries. Online consumption is flat but, within that, social media have grown over the past few years.



TRUST

Trust in the news media is stronger in Portugal than in many other European countries. This may relate to a strong tradition of press freedom, which is guaranteed under the constitution following the 1974 revolution, but also to relatively low levels of political polarisation.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	54% (-9)	76%
2	YouTube	20% (+3)	62%
3	Facebook Messenger	16%	56%
4	Twitter	6% (+1)	15%
5	WhatsApp	6% (+2)	30%

ROMANIA



The Romanian news environment is defined by intense competition for television and online audiences, sustained by understaffed newsrooms that struggle for financial survival.

The media market was hit hard by the economic and financial crises of 2008–9, but started to show signs of recovery in 2016, especially for TV and internet. The advertising budgets per capita, however, are still around 40% lower when compared to the period before the crisis,⁴⁸ making it hard for Romanian newsrooms to compete.

The TV market is an oligopoly, in which a family media business (the Intact group) and a publicly owned company (Central Media Enterprises, an Eastern European player listed on Nasdaq) share the biggest advertising budgets. Due to its mass-market approach, Central Media Enterprises owns the top brands for news both offline (Pro TV) and online (Știrile ProTV). The smaller news-only TV market is crowded, with five national cable stations that all make the list of top offline news brands: Realitatea TV, Antena 3 (Intact group), Digi 24, România TV, and B1.

The Romanian public broadcaster (TVR) is low down the list of most popular online news brands. Official data show that the consolidated market share for TVR is between 3 and 3.5%. Since 2011, its total debt has exceeded total revenues, and the financial situation deteriorated to the point that the European Broadcasting Union did

not allow Romania to take part in the 2016 Eurovision Song Contest. Discussions around possible insolvency culminated with the adoption of a law that scrapped funding from household taxes, replacing this with an increased contribution from the public budget. The 2017 budget allocation for TVR is the equivalent of 60% of the estimated advertising market in 2016.⁴⁹ This has contributed to a situation where the very idea of public television is often under attack.

Print circulations and advertising budgets continue to fall. The three main players rely less on newspapers and more on lifestyle periodicals: Ringier Romania (Swiss) has a popular newspaper, *Libertatea*; Adevarul Holding (Romanian) has a mix of reference and popular newspapers (*Adevărul* and *Click*, respectively); and Burda Romania (German) has a portfolio of lifestyle titles only. Small circulation figures (80,000 for the most successful mass-market title, in 2016) are the reason print is the only medium for which advertising budgets are decreasing.

Online, the competition is strong. A number of different news brands operate in this space, including digital-borns (such as Hotnews.ro or stiripesurse.ro), digital migrants (such as Gândul, that ceased its print edition in 2011, CanCan, in 2012, or ProSport, in 2013), or online sites that are backed up by legacy media (TV or print). Few newspaper publishers have erected online paywalls to replace the sharp drop in print sales and subscriptions. Independent newsrooms that publish narrative and immersive journalism, fact-checking pieces, and investigations receive support from their readers who make direct donations

STATISTICS

Population	20m
Internet penetration	56%

or redirect part of their income taxes for the foundations and associations independent journalists created to support their work. The audiences' heavy reliance on online news consumption (87%) and on social media for information tips (69% for Facebook) is part of the independent newsrooms' business model.

In 2016, maybe more so than in other years, journalism exposed corruption, incompetence, and malpractice in vital areas, such as health, education, and public security. Yet journalists do little to support each other, and are often highly critical of one another in public,⁵⁰ even if they share similarly precarious working conditions, with personnel turnover high in every newsroom.

Trust in Romanian media is low in international comparison, with evidence of political and economic interference in the news agenda, not least scores of transcripts from prosecutors' files on politicians and media owners. Newsrooms compete online for readers' attention and for advertising money with Google and Facebook, with bloggers and influencers (who often do not make clear their financial interests), and with fake news and conspiracy theorists. The individual responsible for the fake news that Pope Francis had endorsed Donald Trump is a Romanian who had plied his trade in his native language first.⁵¹

Raluca Radu
University of Bucharest

⁴⁸ Initiative, *Media Factbook* (2016): www.mediafactbook.ro (accessed Mar. 2017).

⁴⁹ Ibid.

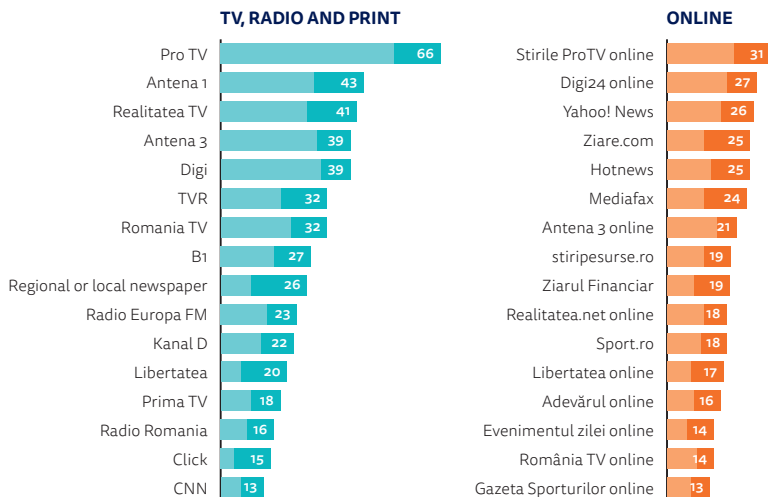
⁵⁰ S. Fengler, T. Eberwein, G. Mazzoleni, C. Porlezza, and S. Russ-Mohl (eds), *Journalists and Media Accountability: An International Study of News People in the Digital Age*, Peter Lang, 2014.

⁵¹ <https://pressone.ro/managerul-site-ului-conspiracionist-expunere-com-implicat-in-dezinformarea-din-campania-electoral-a-american-a>

TOP BRANDS

% Weekly usage

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

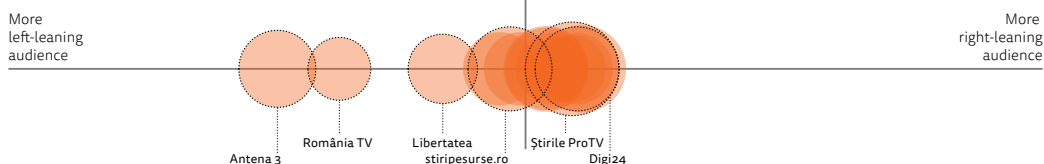


PAY FOR ONLINE NEWS



13%
(=14th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

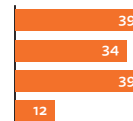
24%
(=16th/36)

BRAND ATTRIBUTES

% of Știrile ProTV users who say it is best for...



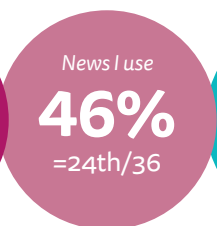
% of Digi24 users who say it is best for...



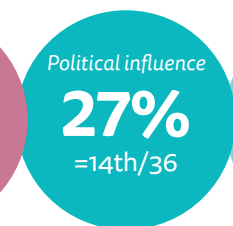
TRUST

Trust in the Romanian media has declined sharply due to a long list of issues, ranging from corruption and blackmail to insolvency, from fake news to obvious political biases. Some of the most powerful media owners and directors have criminal records and have spent time in jail in recent years.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	69%	81%
2	YouTube	30%	70%
3	Facebook Messenger	15%	45%
4	WhatsApp	14%	39%
5	Twitter	9%	20%

SLOVAKIA



STATISTICS

Population	5.4m
Internet penetration	83%

The media environment is characterised by strong privately owned TV and newspapers, including a vigorous tabloid sector. Relationships between the media and the government of Robert Fico have become increasingly strained over the last year.

Long-established TV stations Markiza and Joj are the market leaders offline but the main public broadcaster (RTVS) is also a key source of news through its two television networks and nine radio stations. All the major newspapers are privately owned, with the best-selling daily the tabloid *Nový Cas* (27% weekly reach in our survey).

Slovakia has a constitutionally guaranteed freedom of the press, but although the media have been able to present diverse views and opinions, defamation is a criminal offence, which is punishable by imprisonment of up to eight years, making it the highest penalty in the European Union.⁵² These laws have been tested in a series of rows between the government and the media (especially the private media). The Prime Minister, Robert Fico, has brought libel suits against several newspapers which have been critical of the government. In early 2017 he accused the media of publishing critical and biased information about the government and leading pro-opposition campaigns. Fico has also refused to communicate with or answer questions from particular media outlets and has launched verbal attacks on

the media during press conferences. In November 2016, he called reporters 'dirty, anti-Slovak prostitutes'.⁵³ This denigration of the media may be further undermining trust in the press and in politics more generally.

More recently, Robert Fico has turned his attention to the public broadcaster (RTVS) which he has also accused of supporting the opposition. He has demanded a change of leadership at the top, with current head Václav Mika, in the firing line.⁵⁴

But concerns about editorial freedom do not just relate to pressure from politicians. With the exception of the public broadcaster (RTVS) and the news agency (TASR), major media outlets (both newspapers and TV stations) are owned or co-owned by foreign companies. The lack of transparency and cross-platform ownership of media outlets remain a concern for independent observers. Additionally, a large number of media outlets are now controlled directly or indirectly by local businessmen behind two Slovak financial groups, Penta and J&T, which has also led to public debate about the risks to media freedom.

After Penta gained a large stake in the daily *SME* in 2014, a number of editors, including the editor-in-chief, left the newspaper and established a new independent daily, *Denník N*. Senior editors were concerned that these financial groups might exert political and economic influence on editorial coverage.

In terms of online media, the leading outlets are digital-born news portals. *Topky.sk* is owned by Slovak Telecom and is highly rated in our survey for news that amuses

and entertains. *Aktuality.sk* is a more serious publication owned by Ringier Axel Springer. Unusually, the public broadcaster RTVS does not operate a news website, although there are no formal restrictions on this. In the last year it has launched a smartphone app that allows access to broadcast programmes.

All other traditional media have an online presence and leading print titles are trying to monetise their content. Slovakia is home to Piano Media, which in 2011 enabled the first national paywall for online news media, allowing readers to pay a flat fee for weekly, monthly, or yearly access to premium content across a range of websites. However, over time, a number of publishers left the system seeking greater flexibility and the national paywall experiment ended in the last year.

Although Piano is considered to have taught many people to pay for news, our survey shows that only a minority (12%) subscribe to this or other pay solutions in Slovakia, a percentage that is close to the European average. Piano Media continues however and has gone on to be one of Slovakia's best-known companies, acquiring US-based Press+ to become the world's biggest supplier of paywall solutions.

Facebook is the most widely used social network in Slovakia, but it also has a homegrown community site called *Pokec.sk*, which is popular for news.

Alena Kluknavska
Masaryk University, Czech Republic

⁵² Freedom House, *Slovakia* (2015): <https://freedomhouse.org/report/freedom-press/2015/slovakia>

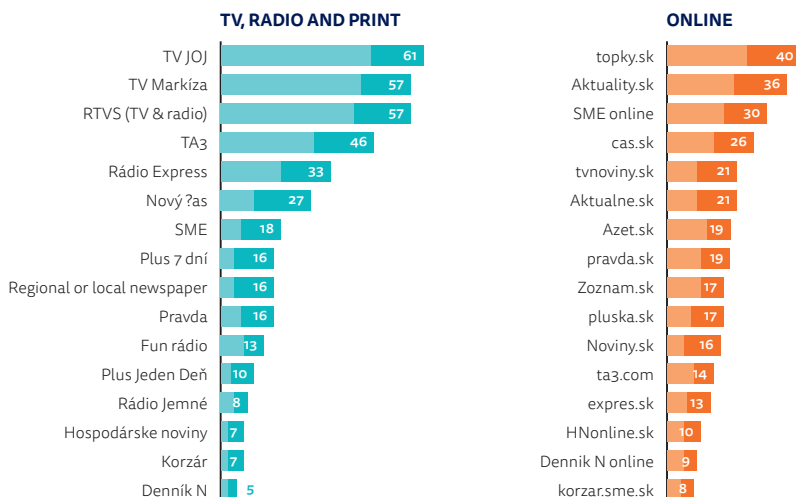
⁵³ Ryan Heath, Robert Fico Calls Reporters 'Dirty, Anti-Slovak Prostitutes'. *Politico* (23 Nov. 2016): <http://www.politico.eu/article/robert-fico-calls-reporters-dirty-anti-slovak-prostitutes-foreign>

⁵⁴ Fico Criticises Media Again. *The Slovak Spectator* (4 Apr. 2017): <https://spectator.sme.sk/c/20500911/fico-criticises-media-again.html>

TOP BRANDS

% Weekly usage

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

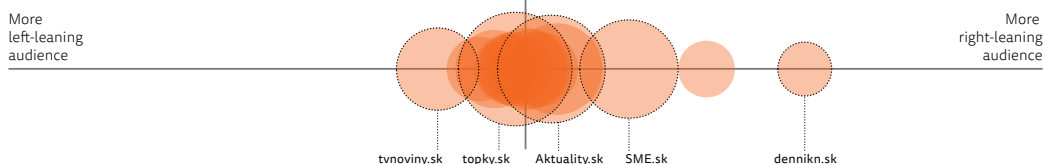


PAY FOR ONLINE NEWS

12%
(=16th/35)



AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

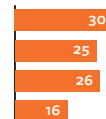
22%
(=27th/36)

BRAND ATTRIBUTES

% of Topky.sk users who say it is best for...



% of Aktuality.sk users who say it is best for...



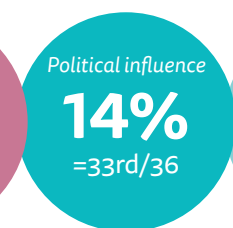
TRUST

Trust in the media has been in general rather low in Slovakia, but the perception of independent journalists has been recently declining even more. It has been affected particularly by the debate on the media ownership of Slovak news outlets by financial groups. The mainstream media are considered biased and the popularity of 'alternative' media has been on the rise.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	54%	74%
2	YouTube	22%	60%
3	Facebook Messenger	10%	35%
4	Pokec.sk	7%	15%
5	Google Plus	6%	15%

SPAIN



Struggling newspapers face increased competition online from broadcasters and a handful of thriving pure players. Publishers are joining forces to create greater commercial scale.

Newspaper circulation continued to decline last year by almost 10% with daily copies dipping below 2 million – less than half the number sold just a decade ago. The leading titles, *El País* (-14%), *El Mundo* (-18.5%), and *ABC* (-14%), suffered the sharpest year-on-year declines in newsstand sales,⁵⁵ and for the first time in almost six decades, no single newspaper sold more than 200,000 daily copies overall, according to OJD, the Spanish Audit Bureau of Circulation.

El País, *El Mundo*, and the freesheet *20 minutos* continue to be the most popular newspapers online. *El País* reshaped its newsroom into a more ‘reader-focused’ one, with increased use of analytics to guide the editorial agenda. It releases content online in three day-parts (at 8am, 2pm, and 8pm).⁵⁶

Urbano Cairo became the CEO and chairman of RCS, the Italian media group that owns *El Mundo* as well as *Marca* and *Expansión*, the leading sport and business papers. In 2016 *20 minutos* redesigned its print editions, which attract a weekday circulation of 300,000 in Madrid, Barcelona, Valencia, and Andalusia. Pedro García Cuartango was appointed editor of *El Mundo* after David Jiménez’s one-year stint. Their predecessor, Casimiro García-Abadillo, led the biggest launch of a digital-native news site in Spain in 2016, *El Independiente*, with a capital of €2.25m.

Digital-native sites continue to thrive in Spain, and reach a bigger mainstream audience than in most other countries. The most successful are *El Confidencial* (founded in 2001) and *Eldiario.es* (2012), and increasingly *Público.es*, too. The latter was a print daily from 2007 to 2012, before becoming online-only.

These pure players tend to focus on a few areas where they can excel. *El Confidencial* has historically concentrated on politics and business, for a more affluent and influential audience than the other natives. But it also diversified early on, with entertainment and technology portals. *Eldiario.es* specialises in new politics, personal/consumer finance, and culture, but it has now moved into sport, and world news though a partnership agreement with the *Guardian*. In a move aimed at gaining additional commercial scale, *Eldiario.es* also bought *Vertele*, a long-established portal specialising in news about television.

Público, alongside dedicated subjects such as ‘climate change and animal abuse’ or ‘women, gender and vulnerable groups’, also publishes the viral vertical #Tremending. This mix of ‘tremendous and trending’ content, which combines rumour and humour with surveys and reader reactions, has become popular on many Spanish internet sites.

Most online news sites in Spain are still dependent on advertising with few publishers operating paywalls, though newspapers get some online income from selling e-editions from digital newsstands. Membership schemes are on the rise. *Eldiario.es* reached 20,000 voluntary paying

STATISTICS

Population	46m
Internet penetration	77%

members in December 2016 and is developing a platform that allows readers to fund specific stories or areas of coverage. *Hipertextual*, a site founded in 2005 and focusing on technology and science, and the leading site in Catalan language, *NacióDigital*, also launched voluntary membership schemes in 2016.

Online advertising continues to be the fastest-growing sector of the market (up 14%), but this in no way compensates for the loss of revenue from print. Overall advertising revenues grew 2.9% in 2016, up to €4,207m, according to Media Hotline-Arce Media,⁵⁷ with television continuing to take more than half the market. Newspaper ad spend fell by 7.1%, with radio remaining stable.

Daily viewership of television fell for the fourth year in a row, though one in five (20%) now use some form of pay TV – a historic market high. In face of increased competition, broadcasters are developing more and more online content. *Prisa Radio* (Cadena SER) launched *Podium Podcast* in June 2016, offering investigative journalism series, entertainment, and fiction.

The Spanish have been quick to embrace the growth of messaging with WhatsApp now used by around a third (32%) of respondents for news. It has become one of the main ways of participation, especially through short voice recordings for radio, and many sites have added a WhatsApp share button.

Samuel Negrodo, Alfonso Vara,
and **Avelino Amoedo**
Centre for Internet Studies and Digital Life,
University of Navarra

⁵⁵ <http://www.media-tics.com/noticia/7227/medios-de-comunicacion/por-que-los-diarios-espanoles-en-papel-siguen-siendo-identicos-a-los-de-antes-de-la-crisis.html>

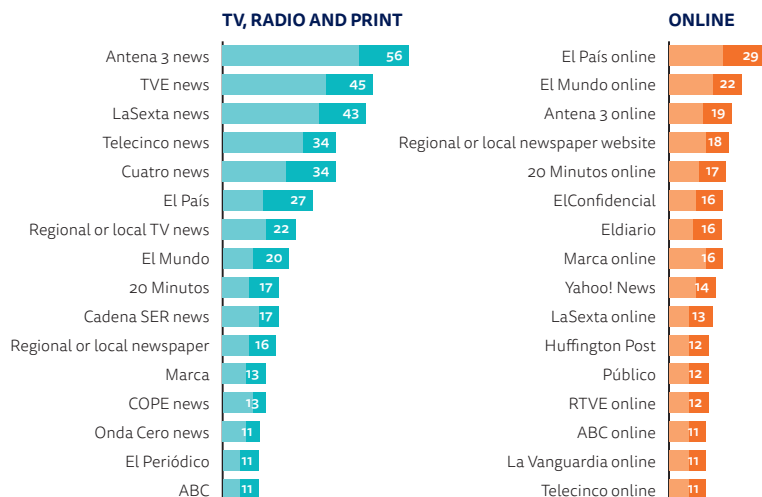
⁵⁶ http://elpais.com/especiales/2016/nueva-redaccion/index_eng.html

⁵⁷ http://www.arcemedia.es/dossier-i2p/2016/i2p_2016.pdf

TOP BRANDS

% Weekly usage

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



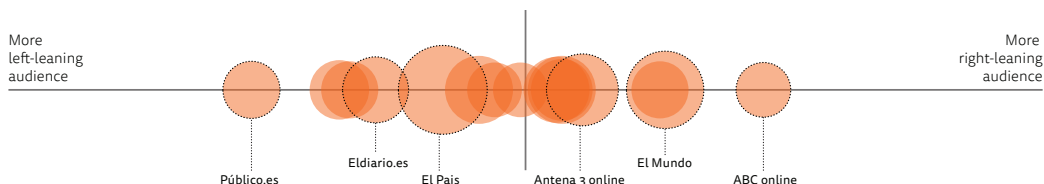
PAY FOR ONLINE NEWS



9% (-1)

(=25th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



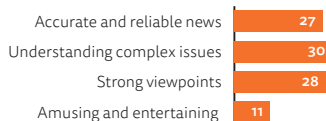
USE AN AD-BLOCKER

28% (-)

(=6th/36)

BRAND ATTRIBUTES

% of El País online users who say it is best for...

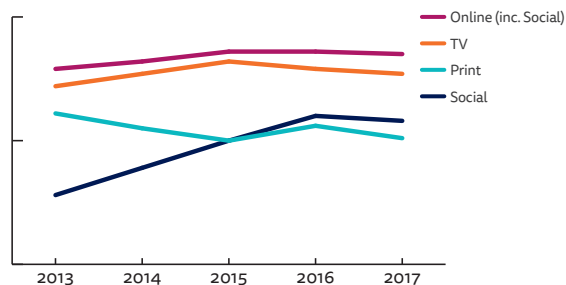
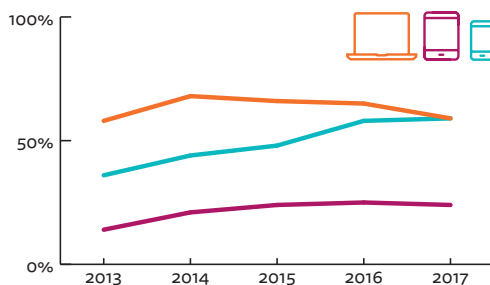


% of El Mundo users who say it is best for...



CHANGING MEDIA

Online has increased steadily in importance as the role of television has begun to wane. Social media use has dipped as the Spanish experiment with new messaging apps like WhatsApp and Telegram.



TRUST

Trust in news continues to increase after it hit its lowest level in 2015. One in three users check five or more online sources during the week, and 48% use five or more offline brands. Governments and opposition parties, nationally and in some regions, exchange accusations of institutional or individual pressure on journalists.

MOST OF THE TIME I TRUST...

News I use
52%
=16th/36

News overall
51% (+4)
=5th/36

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	47% (-2)	73%
2	WhatsApp	32% (+6)	75%
3	YouTube	24% (+5)	67%
4	Twitter	18% (-1)	33%
5	Instagram	6% (+2)	29%

SWEDEN



Quality newspapers and public service broadcasters have long played a key role in the Swedish news ecology, but they now face increased competition in a digital landscape marked by increased use of mobile and social media.

Public service broadcasters SVT (TV) and SR (radio) publish news with both local/regional and national focus, and enjoy a broad reach for news (alongside commercial broadcaster TV4). SVT and SR also publish their news through websites and apps, and enable distribution via non-proprietary platforms in social media. They justify their investments in, and initiatives for, digital media as a way of providing the widest possible access to their public service (news) content, but are repeatedly criticised for doing this by members of the Swedish Media Publishers' Association.

Importantly, the Swedish newspaper industry, once financially strong and successful, is under increasing pressure. Amid substantial disruption to business models and widespread concerns about the future of journalism, the Swedish government held a rigorous governmental inquiry in 2015. This so-called Media Inquiry assessed the tensions between commercial news publishers and public service broadcasters, as well as the growing influence of international giants such as Facebook and Google. The final report was published in November 2016, and contains analyses of the Swedish media landscape

with suggestions for future media policy, most importantly new criteria for future subsidies to commercial news media in the digital age.⁵⁸

In 2016 the circulation for most quality newspapers in print continued to fall. Our survey findings similarly report declines in print readership. Four in ten (37%) read print newspapers and one in four regularly read a local or regional newspaper. The use of computers for online news has fallen to 55%, whereas mobile news consumption remains stable at 69%, on a similar level to television news watching. Sweden thus maintains its position as a country with one of the highest levels of mobile news consumption in our survey. Swedish news publishers invested relatively early in mobile news apps and mobile optimised websites.

Overall print advertising revenues in 2016 were 4.5bn SEK (US\$0.5bn), down 16% in two years. At the same time the overall advertising revenues have increased 9% in the past two years (from 32 to 34.9bn SEK), mostly driven by a 45% increase in online and mobile advertising (from 10.8 to 15.7bn SEK).⁵⁹ Similar to the previous year, 26% reported using an ad-blocker, which continues to eat into news media advertising revenues.

Payments for content constitute an important revenue stream for news media companies, but newspaper publishers have long hesitated, and/or struggled, when it comes to charging for online news content. In the last couple of years more Swedish newspapers have started selling subscriptions for e-paper versions, as well as implementing some form of paywall.

STATISTICS

Population	9.7m
Internet penetration	95%

Typically, paywalls apply only to a selection of unique or 'premium' content, although some charge for all online news material. In 2017, as in 2016, one in five Swedes say they pay for online news. While this number is far lower than what news publishers need, it still puts Sweden at the top end (fourth out of 36) of international comparisons.

Bonnier (*Dagens Nyheter* and *Expressen*) and Schibsted (*Aftonbladet* and *Svenska Dagbladet*) remain the two largest newspaper groups, and continue to report significant profits. There are many other profitable newspaper companies, but there are also several struggling financially. The third largest newspaper group, the Stampen Media Group (*Göteborgs-Posten* and more), was on the verge of bankruptcy in 2016 after seeing a turnaround in its reported financials, from a big loss in 2014, to a modest profit in 2015. During the first half of 2016 the company had difficulties paying wages, but by the end of the year a rescue plan had taken shape, involving new investors, new agreements with banks and the Swedish tax authority. Ultimately Stampen Media Group reported a modest profit for 2016, but critics have questioned their financial accounting.

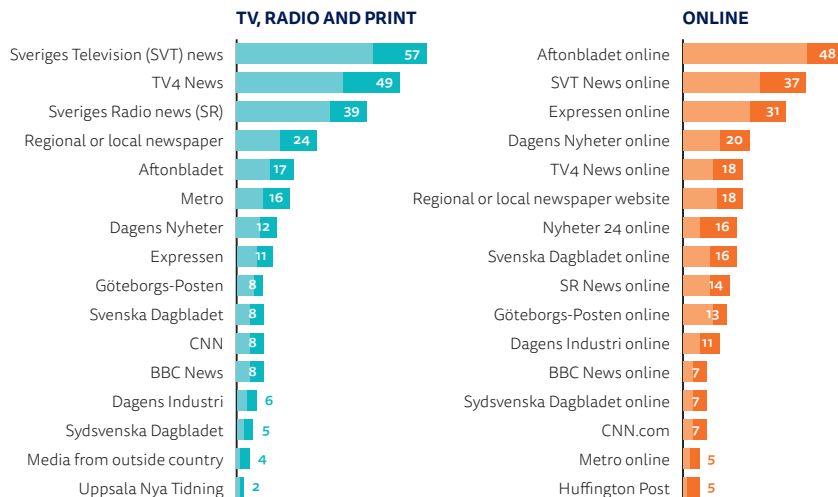
Oscar Westlund
University of Gothenburg

⁵⁸ SOU 2016: 80 (2017) *En gränsöverskridande mediepolitik: För upplysning, engagemang och ansvar*. Stockholm: Wolter Kluwers förlag.
⁵⁹ <http://www.irm-media.se>

TOP BRANDS

% Weekly usage

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

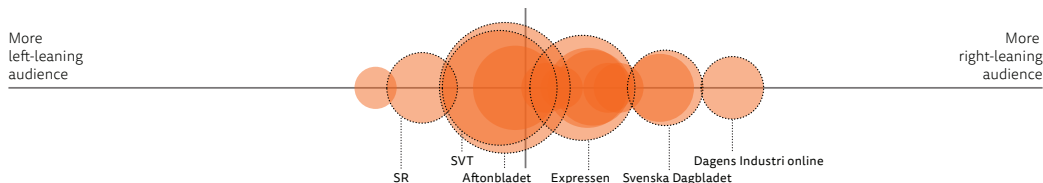


PAY FOR ONLINE NEWS

20% (-)
(=4th/35)



AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS

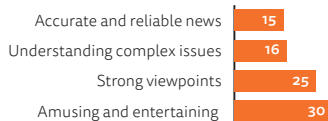


USE AN AD-BLOCKER

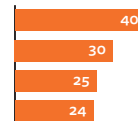
26% (-1)
(=14th/36)

BRAND ATTRIBUTES

% of Aftonbladet users who say it is best for...



% of SVT News users who say it is best for...



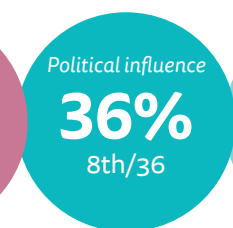
TRUST

Around four in ten (42%) of Swedes express an overall trust in news, but the figure is lower amongst the young and those who are less interested in news. Amid intensified discussions on the prevalence of fake news, there is concern about so-called news avoiders and also right-wing sympathisers deserting news media in favour of so-called alternative media.

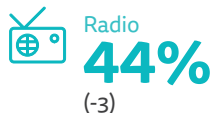
MOST OF THE TIME I TRUST...



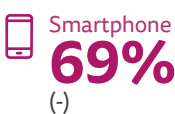
THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	36% (-6)	70%
2	YouTube	12% (+1)	57%
3	Twitter	8% (-)	16%
4	Facebook Messenger	8%	46%
5	Instagram	6% (+1)	42%

SWITZERLAND



This multilingual media environment is characterised by a strong public broadcaster (SRG SSR), concentrated media ownership, and a number of widely read free newspapers, which are also popular online.

This small media market is fragmented into a larger German-language, a smaller French-language, and a tiny Italian-language media market. However, most of the larger media organisations operate in more than one media market.

The broadcasting sector is dominated by the public service SRG SSR, while the private media organisations own a few small regional TV and radio channels but focus on print and online. Tamedia, Ringier, NZZ Mediengruppe, and AZ Medien are still profitable but financing journalism has become increasingly challenging. Advertising revenue for daily papers fell by 11% in 2016 and although digital advertising is growing it cannot nearly compensate the loss in the print sector. In 2017, only 11% of users pay for online news, which is lower than many other countries in this survey.

Media organisations have intensified their strategies of cost-cutting and cooperation. Ringier, for instance, closed the quality weekly *L'Hebdo* in February 2017, provoking intense criticism in French-speaking Switzerland. Tamedia also has substantially cut jobs at several news outlets (*Berner Zeitung*, *24heures*, *Tribune de Genève*, *SonntagsZeitung*). It also has strengthened cross-organisational

cooperation. For instance, *Tages-Anzeiger*, Tamedia's flagship newspaper, now shares its foreign correspondent network with the German *Süddeutsche Zeitung*.

Players formerly operating in different fields have now become competitors in the digital market. This increases the pressure on the SRG SSR, with (private) media, political parties, and pressure groups intensifying this debate. Especially right-wing populist actors, among them Switzerland's largest party SVP, have launched proposals to weaken the role of the SRG SSR. The referendum on the 'No Billag' initiative, which demands the abolition of licence fees, will be held in summer 2018. Should citizens accept it, this would not only seriously affect all smaller private regional radio and TV programmes, also partially funded by licence fees, but also the nation-wide PSB, SRG SSR, which now contributes most to a substantial and diverse media coverage with its news programmes.⁶⁰ Controversy also arose when the SRG SSR, together with the state-owned telecom company Swisscom, which also offers digital TV, and Ringier launched the company Admeira in April 2016, offering a common advertising platform. While the SRG defends this move as a necessary fight against global tech companies, most private media not participating in this platform criticise it as a distortion of competition.

Still, private media are also cooperating with the SRG SSR, especially in the digital sector. News outlets of Ringier and NZZ Mediengruppe, for instance, use video material by the SRG SSR for their own newspaper internet sites. Furthermore, private media and the SRG SSR have announced they will co-finance a new

STATISTICS

Population	8.2m
Internet penetration	87%

media technology research center at the prestigious technical university ETH Zurich. A similar project is underway in the French-speaking part at ETH Lausanne.

The crisis in journalism also has led to new activities on the market that aim at countering the alleged decline of quality reporting. Well-known quality journalists are building a digital news platform (working title Project R), similar to the Dutch *De Correspondent*. In Switzerland, this is the only news project that has used a crowdfunding approach to get started. Later, the platform is supposed to be financed by subscribers and sponsors.

The survey data this year again highlight the importance of free media aimed at commuters. More than 50% say they use weekly *20 Minuten* or *20 minuten*, respectively, both the print and the online version. The shift to online has also enabled new players which started as email providers to become established as news aggregators (e.g. *bluewin.ch* or *gmx.ch*). The PSB, SRG SSR, along with smaller regional broadcasters, struggle to find similar audience reach online.

Smartphones remain very important devices to access news (61%) while social media appears to have peaked (perhaps temporarily), with Facebook still dominating. The role of Facebook is also discussed critically. One article in the *Swiss Magazin* (a weekly supplement to *Tages-Anzeiger*) disclosed the alleged manipulation of Facebook users by the company Cambridge Analytica, which in December 2016 triggered a significant debate in neighbouring Germany as well.

Mario Schranz, Mark Eisenegger
and **Linards Udris**

Research Institute for the Public Sphere & Society, University of Zurich

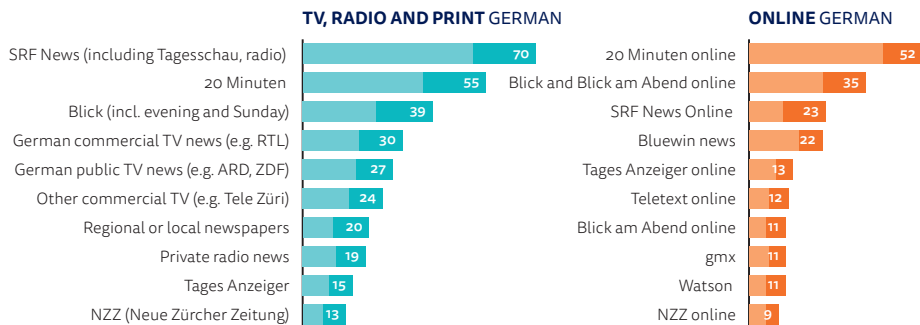
⁶⁰ http://www.foeg.uzh.ch/dam/jcr:3e11e63d-4d8e-4b54-8972-611e94e80546/Broschur_Jahrbuch_foeg_englisch_2016.pdf

⁶¹ <http://www.foeg.uzh.ch/de/analyse/medienagenda.html> (in German)

TOP BRANDS

% Weekly usage

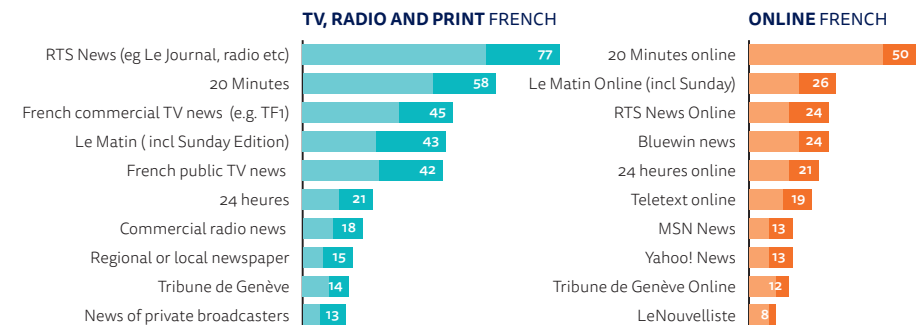
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



PAY FOR ONLINE NEWS



11% (+1)
(=20th/35)



USE AN AD-BLOCKER

19% (-1)
(32nd/36)

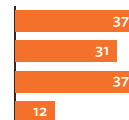
BRAND ATTRIBUTES GERMAN

% of 20minuten users who say it is best for...



BRAND ATTRIBUTES FRENCH

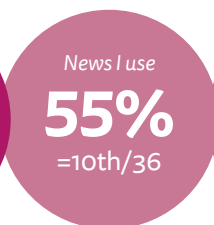
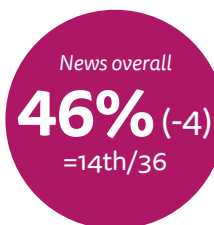
% of RTS users who say it is best for...



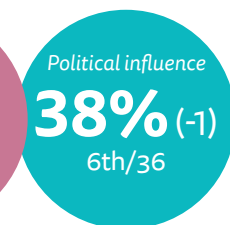
TRUST

Trust in news media in Switzerland is still comparatively high even though it has declined. This decline arguably is an effect of the debate about 'fake news' around the presidential election in the United States, which was the topic that dominated the agendas of Swiss media according to analysis at our institute.⁶¹

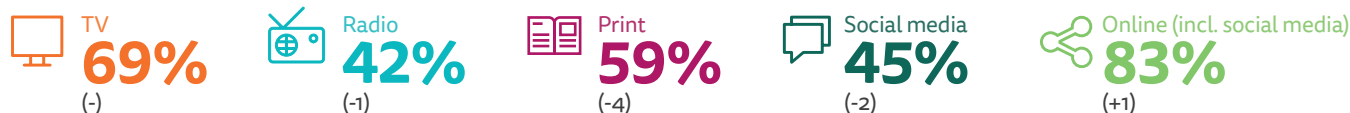
MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	35% (-1)	60%
2	YouTube	23% (+4)	59%
3	WhatsApp	21% (+2)	63%
4	Facebook Messenger	6%	29%
5	Google Plus	6%	10%

TURKEY



In the wake of the failed coup and subsequent referendum giving President Erdoğan sweeping new powers, online websites, blogs, and social media have emerged as a centre of opposition. Mainstream media remain largely controlled by the government.

Turkey has been under a state of emergency since a failed coup of July 2016, in which 248 people were killed and hundreds injured and the political turmoil has had a significant effect on the freedom and independence of the Turkish media. Turkish authorities have shut down nearly 150 media outlets including 55 newspapers, 5 news agencies, 16 TV channels, 23 radio stations, 18 magazines, and 29 publishers by using powers invested under the state of emergency.

Turks tends to be deeply divided into supporters or opponents of the ruling AK party – and the same level of polarisation applies to the media. People in either camp prefer to trust what they want to believe without questioning the reliability and accuracy of the news. To illustrate this, the anti-government *Sözcü* is read mainly by people who self-identify on the left (50%) and only a few who identify on the right (9%). At the same time, around four in ten (39%) of its readers think it is best for accurate and reliable news.

The spate of newspaper closures has surprisingly not adversely impacted general sales at the newsstand,⁶² but advertising

revenues for newspapers have taken a hit. The share of printed media (14.8%) continued to decrease in 2016 whereas digital advertising (24.2%) continues to grow and is now second to television (51.2%).⁶³

The biggest online news sites, however, continue to be traditional media brands using content repackaged from print (*Hürriyet*, *Milliyet*), television (CNN Türk, NTV), or from news agencies. Digital-born web-portals, which aggregate stories from newspapers and agencies, such as Mynet, Haberler, and EnSonhaber, also play a major role in Turkey but the range of news outlets being accessed increases every year.

Indeed mainstream media have been losing their monopoly in agenda setting as digital-born news sites and social media often become the first port of call for news. The pressure on opposition media outlets has led to the creation of a number of small-scale online journalism portals and platforms where free journalism is practised. Articles are shared via social media and increasingly via encrypted messaging apps.

While the successful digital-born sites like Odatv (14%), T24 (8%), Diken (6%), and Bianet (2%) have kept their position in our survey, the number of digital-born news brands has increased this year. These include Duvar, Karınca, Webiztv, and 140journos, a prominent citizen journalism project, which has gained attention for its pioneering use of social media to distribute content. Another approach comes from Journo, which provides a platform for freelance journalists and ensures they

STATISTICS

Population	78m*
Internet penetration	60%

are paid via the MATRA human rights funds. Well-known reporters, many of whom have lost their jobs with recent closures, contribute to this portal with their exclusive stories.

Paying for online news is extremely rare in Turkey, although most printed media outlets do provide an option to subscribe to a pdf format e-edition or pay for web access without advertising. Some dailies like *Birgün* or *Özgür Düşünce* that take a particular ideological stance have asked their readers to support their services, but these approaches have not yet been successful. There is little prospect for anti-government publications to make money as it is easy for the authorities to block websites or find other ways to cut off funding or readership.

The sharp downturn in the use of Facebook and Twitter for news may also be related to fears about government surveillance. Use of Facebook for news fell by 10 percentage points in the last year with Twitter down by 5 points. The rise of closed messaging services like WhatsApp (+8) as a way of sharing news may be linked to a climate where it is not safe for public servants in particular to criticise the government on social media. The Ministry of Interior says that more than 3,000 people were prosecuted, and over 1,500 arrested in the second half of 2016.

Servet Yanatma

Former Reuters Institute Journalist Fellow

⁶² <http://www.tuik.gov.tr/PreHaberBultenleri.do?id=21543>

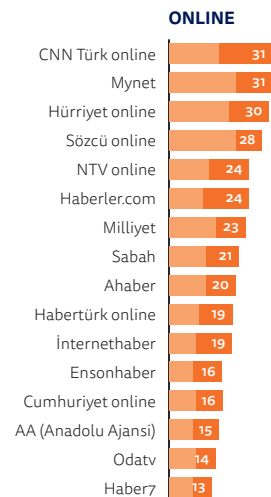
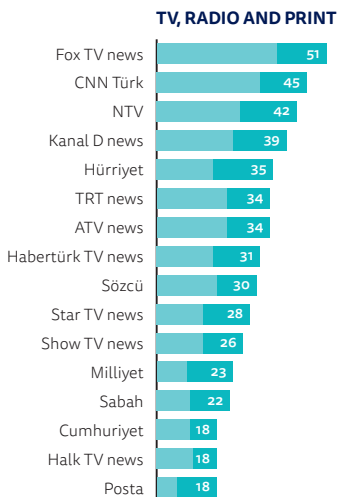
⁶³ <http://www.mediacaonline.com/reklamcilar-dernegi-2016-reklam-yatirimlari>

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

TOP BRANDS

% Weekly usage

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

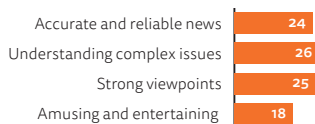


USE AN AD-BLOCKER

27% (-4)
(=9th/36)

BRAND ATTRIBUTES

% of CNN Turk users who say it is best for...



% of Mynet users who say it is best for...



% of Sozcü users who say it is best for...

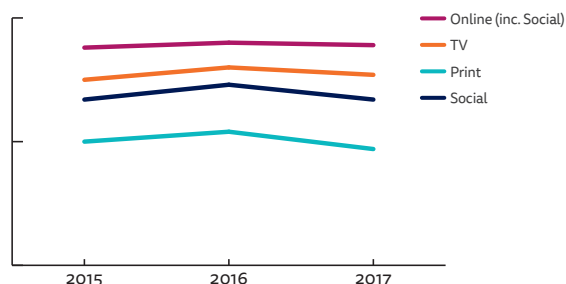
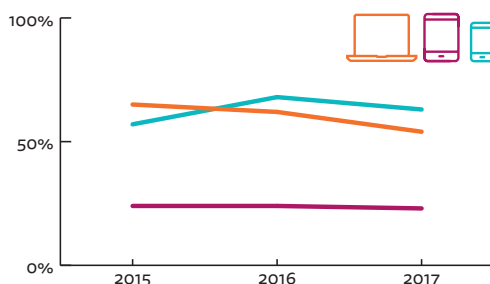


% of Hurryet users who say it is best for...



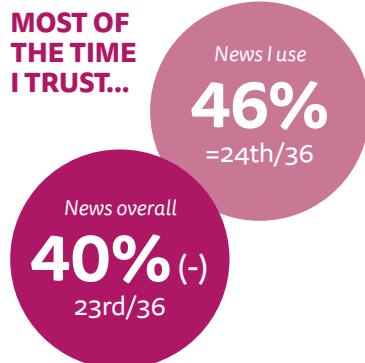
CHANGING MEDIA

The smartphone has overtaken the computer in terms of access to news, particularly for the young. TV and online remain the most important sources of news while social media use is declining as people adopt more secure messaging apps for sharing news.



TRUST

One expects lower trust levels in a country where the media are largely controlled by the government but the ruling party got 49% of the votes in the last election in November 2015. Although the small difference (6%) between trust in news 'overall' and 'I use' might suggest low levels of political polarisation, this is not the case in Turkey where society remains deeply divided.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	54% (-10)	73%
2	YouTube	32% (+1)	66%
3	Twitter	25% (-5)	41%
4	WhatsApp	25% (+8)	64%
5	Instagram	17% (+5)	45%



Americas

4.24	United States	102
4.25	Argentina	104
4.26	Brazil	106
4.27	Canada	108
4.28	Chile	110
4.29	Mexico	112

UNITED STATES



The fragmented US media landscape is dominated by private, for-profit enterprises, but new commercial challenges are causing both legacy and digital-born organisations to experiment with new strategies for growth.

The news media in the US remain fiercely competitive, with many vying for a shrinking pool of advertising dollars offline and a seemingly precarious share online – a market increasingly dominated by the Silicon Valley giants Google and Facebook. While business models continue to face upheaval from mobile devices and social media, some glimmers of hope appeared last year with a sudden burst of paid subscriptions following November's presidential election.

Two trends accelerated over the past year against the backdrop of the election. First, more than half of Americans (51%) now say they used social media for news in the previous week. Twitter in particular, Donald Trump's social media platform of choice, appears to have benefited from the campaign. Although only a small percentage say they use Twitter for news (15%), that figure was up from 10% a year ago. Second, when Americans get news online, they increasingly reach for a smartphone (55%), with computer use falling significantly.

These dual trends have led a growing number of organisations to embrace third-party delivery systems such as

Facebook Instant Articles and Google's AMP, which speed up the time it takes for content to load on mobile devices. But this growth has also met resistance from some publishers sceptical of trading traffic for control. Technology platforms are now estimated to command nearly two-thirds of all digital advertising revenue, according to a Pew study last year.

Adding to these digital disruptions, the election may have exacerbated polarisation in news audiences in the US. Trust in news remains strikingly divided along ideological lines, with those on the right twice as likely to say they mistrust the news as those on the left. While non-ideological outlets such as local television remain the most used sources offline, niche partisan outlets like Breitbart and Occupy Democrats grew their audiences considerably online. The election also proved valuable to some legacy organisations, particularly those with established reputations. Many more Americans reported paying for online news than ever before (16%), a seven percentage point increase, and institutions such as the *New York Times*, the *Washington Post*, and the *Wall Street Journal* all reported significant post-election boosts in subscriptions.

This subscription boom overshadowed otherwise worse-than-expected declines in the print advertising market in the US. At the *Times*, a 16% fall in print advertising more than offset digital revenue growth for the year, with overall revenue down 2%. At McClatchy, which owns 30 regional newspapers, strong digital growth (+14.8%) still could not compensate for double-digit declines offline, with overall revenue down 10.8% for the year. At the *Journal*, the

STATISTICS

Population	324m
Internet penetration	90%

advertising market prompted staff reductions in a newsroom that had once seemed relatively insulated from the forces battering the industry.

Uncertainty may have contributed to the failed merger of two of the largest US newspaper chains last year. Gannett, which owns more than 110 properties, proposed acquiring 'tronc', the publisher of the *Los Angeles Times* and the *Chicago Tribune*, but later withdrew its offer in response to shareholder scepticism about the \$815m deal.

In October, the *New York Times* added to its array of lifestyle recommendation products by purchasing the Wirecutter and the Sweethome, product review sites which generate income through affiliate marketing links. Others have sought to weather the storm by becoming more indispensable to advertisers. BuzzFeed and Vox have pursued partnerships with third-party distribution platforms and developed in-house studios for sponsored content.

American media companies remain global leaders in pioneering new digital revenue streams, but questions remain over whether commercial efforts alone will be enough to support levels of watchdog and investigative journalism needed to sustain a healthy democracy. While a select number of national newspapers and a handful of nonprofits (ProPublica plans to open their first regional operation in Illinois this year) still fund rigorous newsgathering operations, state and local public affairs coverage generally remains a shadow of its former self. The future of news in the US may ultimately depend on whether the post-election surge in willingness to pay proves fleeting or a harbinger of a broad-based cultural change in public support for quality journalism.

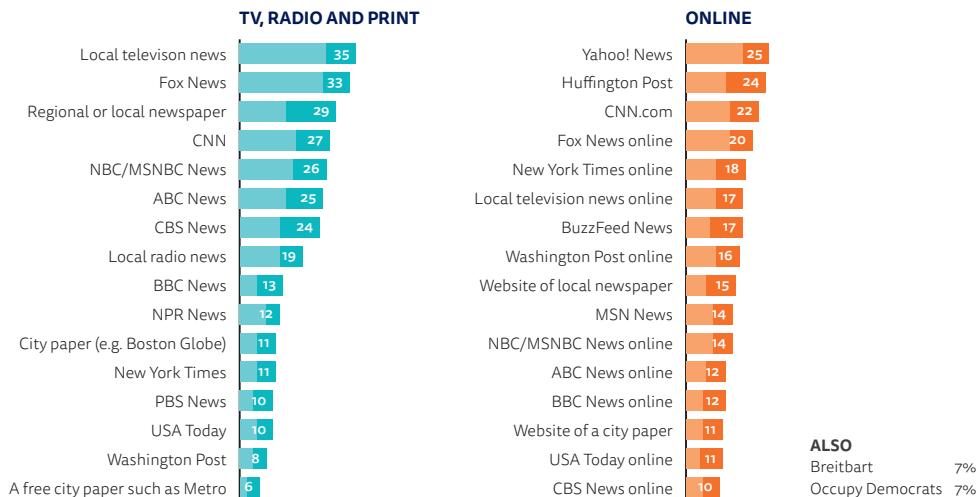
Benjamin Toff

Research Fellow, Reuters Institute for the Study of Journalism

TOP BRANDS

% Weekly usage

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



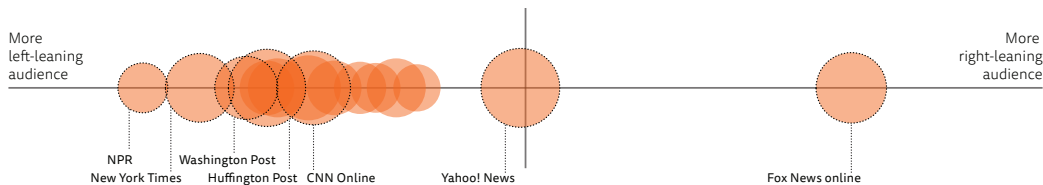
ALSO
Breitbart 7%
Occupy Democrats 7%

PAY FOR ONLINE NEWS



16% (+7)
(=7th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

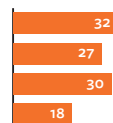
23% (-1)
(=22nd/36)

BRAND ATTRIBUTES

% of Fox News users who say it is best for...

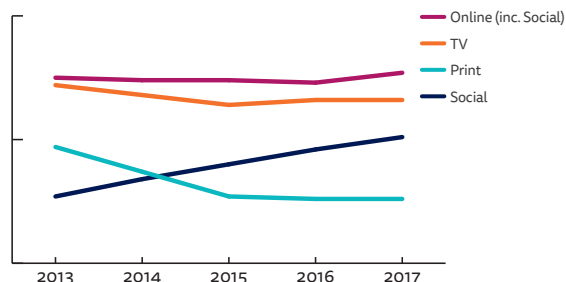
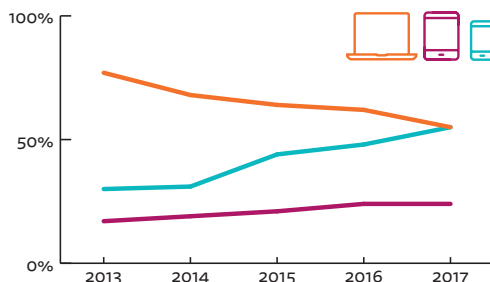


% of CNN users who say it is best for...



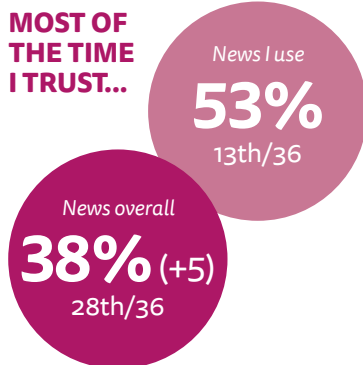
CHANGING MEDIA

Cable TV news has benefited from a Trump bump, reversing earlier declines but online and social media has benefited even more. In terms of devices, the smartphone now matches the computer in weekly use.



TRUST

Following the presidential election, many publicly voiced concern about the spread of false information online, highlighting the value of professional journalism. Perhaps as a consequence, trust in news increased in the US (to 38%). While still low compared to other countries, Americans reported markedly higher trust in the news sources they themselves use (53%).



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	48% (+3)	71%
2	YouTube	20% (+1)	56%
3	Twitter	15% (+5)	26%
4	Facebook Messenger	9%	37%
5	Instagram	5% (+1)	23%

ARGENTINA



STATISTICS

Population	44m
Internet penetration	79%

The media environment in Argentina is characterised by a strong concentration around the Clarín Group, a weakened public system, some innovative online initiatives, and prominent use of social media for news.

Online media already surpass television as an information source. News usage on Facebook is high, and on WhatsApp, YouTube, and Twitter to a lesser extent. However, as in most countries, a significant proportion of this is due to incidental exposure, where people come across news whilst using social media for other reasons. Since 2011, studies have identified Latin America as a region where users spend more time on social media. The social and friendly nature of Latinos often explains this trend, as well as the existence of a relatively young population and the widespread use of smartphones.

Argentina is dominated by news brands from the Clarín Group, who generally support President Macri. The news channel TN, the newspaper *Clarín*, and radio station Mitre are amongst the most popular offline brands. Clarín.com, TN.com.ar, and the sports paper *Olé* are important online. The main offline competitor is the channel C5N, which opposes the national government, while on the internet there are Infobae and *La Nación*. Regional or local media are also prominent news sources both online and offline.

The election of Macri in December 2015, after 12 years of 'Kirchnerism', brought important rearrangements to the structure

of public and private media. Through decrees, the new government altered the Law of Audiovisual Communication Services, and attenuated or eliminated limits to concentration and cross-ownership of the communication sector to the benefit of *Clarín* and Telefónica. Radio Nacional modified its programming for the sake of (alleged) plurality and lost much of its audience. The *Televisión Pública* became less biased but, with the elimination of the programme *Fútbol para Todos*, was left without television rights for the main football matches, which were transferred to private channels. Thus it also lost viewers and resources.

Brands from the 23 Group, which had enjoyed generous official advertising revenue from the Kirchner government, were left underfunded and entered into a crisis. Something similar happened to Radio Del Plata (on the verge of closure) and Radio America, which was acquired by Perfil. Either because of layoffs, closing of media, or voluntary redundancies, 1,285 jobs were lost in the media during 2016 in Buenos Aires city alone, according to the Sipeba union.⁶⁴

In TV, new players are entering the market. Fox and Turner acquired the rights to broadcast football and Viacom bought the channel *Telefé*. *La Nación* launched the news channel LN+ and Perfil is preparing to broadcast on open television. Printed newspapers cannot halt a structural decline in sales that began in the 1970s but accelerated in the last decade. In 2005, *Clarín* sold almost 500,000 copies; in January 2017 it continued to lead but only reached 190,000, its lowest figure since

1954. *La Nación* has suffered less but still fell from 177,000 to 120,000 copies. As a result, redesigns have become frequent. In 2016, both *La Nación* and *La Voz* changed to tabloid format after more than 100 years of broadsheet. In the last year, some newspapers have closed, such as *La Mañana de Córdoba* and *Uno* of Santa Fe. Others are no longer published every day, such as the centennials *Buenos Aires Herald* and *La Nueva*. *Clarín* closed one printing plant.

Meanwhile, digital editions continue to grow, although their income far from compensates for print losses. In Argentina, models based on free access funded by advertising predominate; just one in ten online users paid for news in the last year. There are, however, sites that try to innovate. *Chequeado* is a key reference point for fact-checking in Latin America. *Vorterix Rock* is a cross-platform media source with new artistic and commercial offerings. *Radio Cut* is an aggregator that lets you listen to different radio stations, trim segments of audio, and share them on social networks. *UnoAR* is smartphone-centric, and narrates news with memes and gifs. Narrative journalism is also booming with sites like *Anfibia*, *Tucumán Zeta*, *Revista Ajo*, *La Tinta*, and *Salida al Mar*. They typically have a more visual design and longer articles.

Alejandro Rost

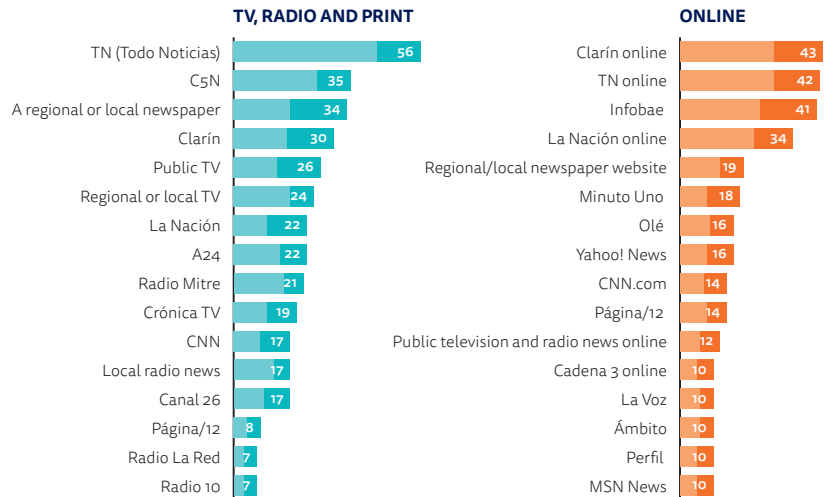
Universidad Nacional del Comahue

⁶⁴ <http://www.sipeba.org/notas/2016-un-ano-de-despidos-precarizacion-y-ajuste-salarial-en-los-medios-de-comunicacion>

TOP BRANDS

% Weekly usage

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



PAY FOR ONLINE NEWS

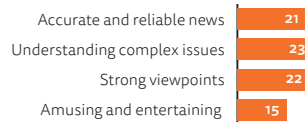


10%

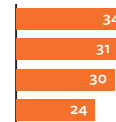
(=22nd/35)

BRAND ATTRIBUTES

% of Clarín users who say it is best for...



% of TN users who say it is best for...



USE AN AD-BLOCKER

31%

(=3rd/36)

% of Olé users who say it is best for...



% of La Nación users who say it is best for...



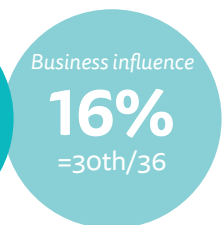
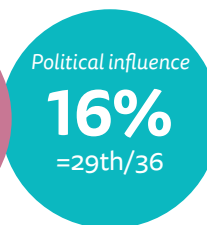
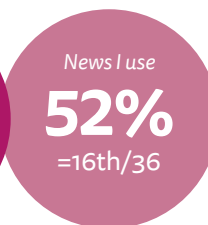
TRUST

Many Argentines consider news to be unduly influenced by both commerce and politics. Fake news frequently circulates on both social networks and the mainstream media. Sources have published non-existent deaths, April Fools jokes, and political propaganda. The site Chequeado launched the hashtag #falsoenlasredes in order to identify and correct them.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	65%	83%
2	WhatsApp	33%	76%
3	YouTube	28%	75%
4	Twitter	19%	32%
5	Facebook Messenger	10%	42%

BRAZIL



STATISTICS

Population	206m*
Internet penetration	68%

Strong commercial television broadcasters dominate the media environment in Brazil. Media ownership is concentrated in the hands of a few domestic groups, but social media are playing an increasingly important role in news consumption.

Although internet penetration continues to rise quickly, the web's popularity is still no match for television. More than 97% of Brazilian households have a TV set, but as recently as 2015 only one in every two homes was connected to the internet. Nevertheless, online platforms are already the main source of information for people in urban areas, especially those with higher income and education levels.

The enduring recession – the worst on record in Brazil – has continued to hurt the media. By December 2016, the total circulation of the top five paid-for dailies had fallen almost 8% when compared to the average number of copies sold in 2015.⁶⁵ The harsh economic conditions led to the closure of at least two radio stations, one local TV broadcaster, and seven print media outlets; including the second oldest newspaper in Brazil, *Jornal do Commercio*, founded in Rio de Janeiro in 1827.⁶⁶ Both TV and print media lost some of their importance as news sources in the last year, according to the respondents to our survey.

Despite the overall decrease in newspaper circulation, the number of digital subscribers saw steady growth, as an

increasing number of dailies adopted paywalls and launched electronic editions. On August 2016, *Folha de S. Paulo* – the best-selling daily title in the country – announced that its digital circulation had surpassed that of its print edition. However, the overall percentage of our urban Brazilian respondents that pay for online news (22%) hasn't changed from the previous year.

Legacy news brands remained the most popular in the online environment but there's been a noticeable shift in the devices used to access journalistic content on the web. In 2016 smartphones overtook computers as the prime channel for the consumption of online news.

Amidst growing unemployment and market changes, more than 36 million mobile lines have been disconnected by telecom operators in the past two years, according to the federal regulator. This is particularly important when we consider that – according to the Brazilian Media Survey, conducted by the government – 91% of the internet users in the country access the web via mobile phone. Nonetheless, online platforms remain the main source of news within urban Brazil, since the penetration of mobile services remains high.

Investment in online advertising rose 26% when compared to 2015, driven by a 115% surge in funds spent on video commercials on the internet (IAB Brasil and comScore). Ad-blockers are less of a problem (17%) for the Brazilian digital advertising market when compared with other countries. Our survey shows that ad-blockers were installed on just 8% of smartphones.

Although social media are still extremely popular in Brazil, their use as a news source lost momentum last year, just as Facebook and its peers seemed destined to outstrip TV. Almost eight in ten Brazilians use Facebook for any purpose, but the use of paywalls by the leading Brazilian newspapers may be slightly reducing social media news sharing. Already a favourite among Brazilians, WhatsApp reached new levels of popularity as telecom operators started to offer special WhatsApp pay-as-you-go data packages with almost unlimited messages, boosting its use as a tool to share news.

In line with the international debate about fake news, some media outlets – like the web portal G1 and the newspaper *O Globo* – recently announced fact-checking teams to investigate news published on the internet, rumours spread on social media, and even information taken from official announcements.

Rodrigo Carro

Former Reuters Institute Journalist Fellow and financial journalist

⁶⁵ Instituto Verificador de Comunicação (IVC) and National Association of Newspapers (Associação Nacional de Jornais).

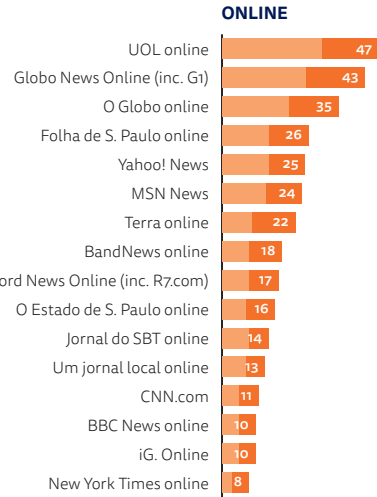
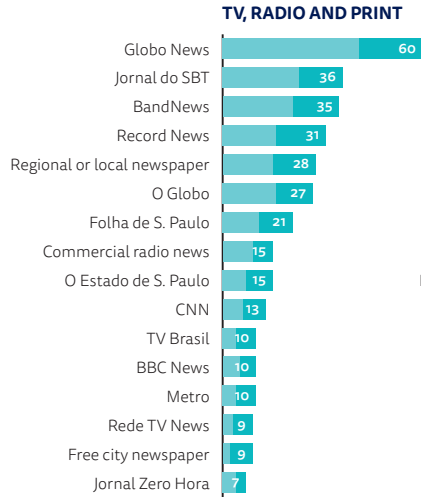
⁶⁶ <http://portal.comunique-se.com.br/balanco-de-2016-ao-menos-11-veiculos-de-comunicacao-foram-encerrados-no-brasil>

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

TOP BRANDS

% Weekly usage

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



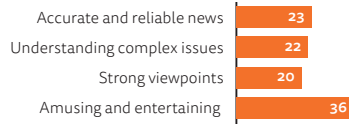
PAY FOR ONLINE NEWS



22% (-)
(2nd/35)

BRAND ATTRIBUTES

% of UOL users who say it is best for...



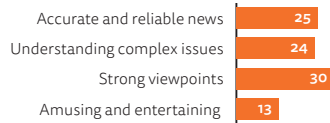
% of O Globo users who say it is best for...



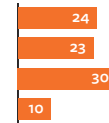
USE AN AD-BLOCKER

17% (-4)
(=33rd/36)

% of BandNews users who say it is best for...

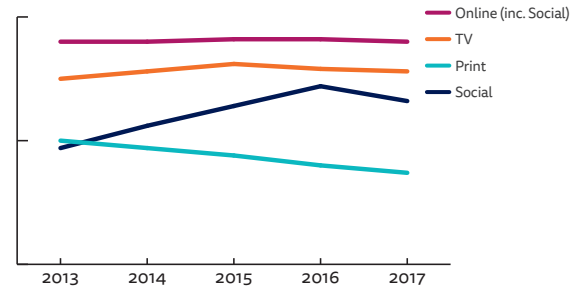
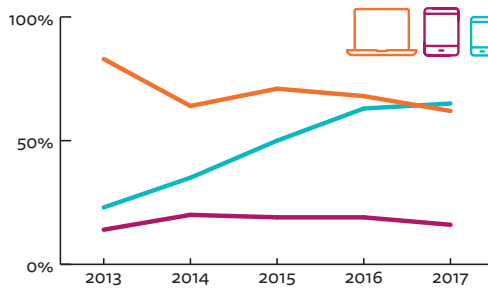


% of Folha de S. Paulo users who say it is best for...



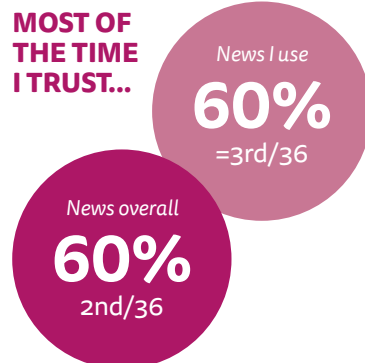
CHANGING MEDIA

Smartphones have overtaken computers as the main device for accessing news for the first time this year. Social media for news has declined slightly after several years of strong growth with sharing and participation moving to closed messaging services like WhatsApp.



TRUST

The impeachment of President Dilma Rousseff and its aftermath focused the attention of the news media during 2016. As a result of the extremely polarised political environment, the percentage of people that believe that media is free from undue political influence fell from 36% to 30%, year-on-year, but overall trust in news continued to be high.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	57% (-12)	76%
2	WhatsApp	46% (+7)	78%
3	YouTube	36% (-1)	77%
4	Instagram	12% (+1)	40%
5	Twitter	12% (-1)	25%

CANADA



As media companies continue to reduce staff, restructure news coverage, and explore new revenue sources, governments are reconsidering their role in supporting news production beyond public broadcasting, and to improve 'discoverability' of national content.

As advertising revenues continued to decline for legacy media, hundreds of layoffs were announced throughout the year. In October, the troubled Postmedia group disclosed its plan to reduce staff by 20% across its newspaper chain. Multimedia group Québecor closed its cable business news channel, Argent, and announced the restructuring of its digital operations, including layoffs at the French-language Canoe web portal. Bell Media, Torstar, *The Globe and Mail*, and even Huffington Post cut jobs as well.

Several weekly community newspapers either merged or closed. Transcontinental Media sold all of its 28 publications in Atlantic Canada to the owners of the *Halifax Chronicle-Herald*, whose journalists have been locked out since January 2016. In April 2017, 93 Transcontinental newspapers in Quebec (91 local or regional weeklies, and the free daily *Métro Montréal*) and one in Ontario were put up for sale. Meanwhile, news magazines such as *Maclean's* and *Les Affaires* reduced frequency of publication. Rogers sold several of its French-language magazines to Alexandre Taillefer, a Quebec businessman.

Vice Media's success with millennial audiences has led to partnerships with Canadian media companies, most notably Rogers for the specialty TV service VICELAND, but also the aboriginal network APTN and the parliamentary channel CPAC.

Vancouver Island now has a new free daily newspaper, published by Black Press (which previously closed several newspapers on the island). The *New York Times* and the BBC launched Canadian operations, while BuzzFeed closed its Ottawa bureau. The *Toronto Star* has found what appears to be a natural companion to the daily newspaper as a new revenue stream: coffee delivery. Readers can order a monthly dose of locally roasted fairtrade coffee as a supplement to their print subscription package. Torstar reported profits in the last two quarters of 2016, and smaller losses over the course of the year compared to 2015.

Meanwhile, the national public broadcaster (CBC) is focusing on new digital formats to reach a younger audience, and launched an opinion page on its website. The CBC came under pressure from private media companies to remove all advertisements from its websites. It says it is prepared to go ad-free, but only in exchange for a substantial increase in its public funding. According to an Ipsos study, the public broadcaster is the most influential Canadian media brand.⁶⁷

Attitudes and reported consumption of news online appear relatively stable compared to our 2016 study. Use of ad-blockers appears to be growing slightly, as well as almost all offline news brands – both in English- and French-language media. Canadians report getting online

STATISTICS

Population	35m
Internet penetration	93%

news more from smartphones and a little less from a computer or tablet.

The Canadian and Quebec governments have undertaken significant reviews of their cultural and digital policies. The Canadian Radio-television and Telecommunication Commission (CRTC) and Canadian Media Fund seek to promote 'discoverability' of national content (news and entertainment) on digital platforms. Labour groups and a coalition of Quebec newspapers have lobbied for public funding to help commercial news media weather the digital transition, while a report commissioned by the federal government recommended a series of measures, including introducing a levy on digital advertising revenues from foreign-owned websites including Google and Facebook. This revenue could be used, it suggests, to support local, civic, and indigenous news reporting.⁶⁸ But for the moment, there has not yet been any significant policy commitment to support news media, although new measures introduced by the CRTC allow existing funding to be shifted to local news, much of it from community channels run by commercial networks.

Revelations of electronic surveillance of journalists by police have recently come to light. They seem to have been especially widespread in Quebec, where a commission of inquiry was created to address the problem. Sponsored content and native advertising practices continue to raise concerns for journalistic independence and trust in several media companies, including the CBC. The satirical website 'Journal de Mourréal', a parody of the tabloid newspaper *Journal de Montréal*, was sued by Québecor and won a first round in court. It was later revealed that the site's creators also produce an English-language fake news site, the World News Daily Report.

Colette Brin

Centre d'études sur les médias, Université Laval

⁶⁷ <http://www.broadcastermagazine.com/acquisition/ipsos-survey-says-cbc-1-media-brand-canada/1004122266>

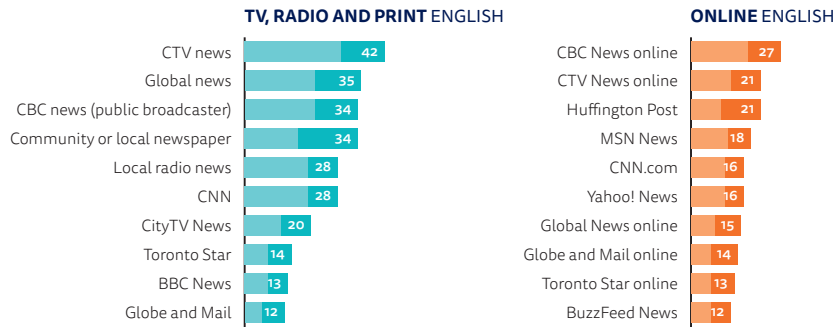
⁶⁸ Public Policy Forum (PPF), *The Shattered Mirror*: <https://shatteredmirror.ca>

⁶⁹ <http://www.theglobeandmail.com/report-on-business/study-says-people-are-worried-about-unreliable-information-and-fakenews/article34092454>

TOP BRANDS

% Weekly usage

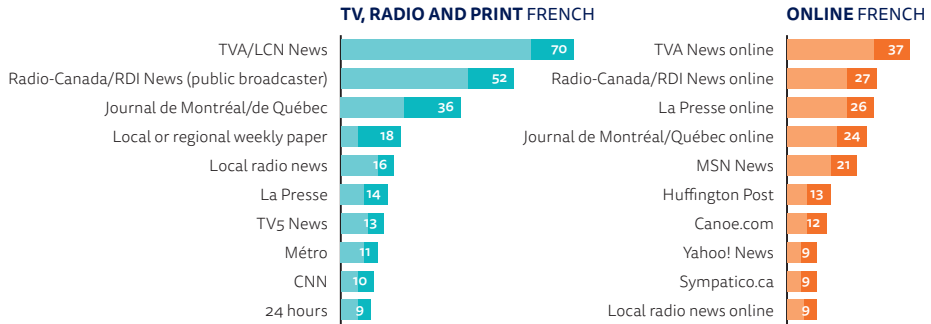
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



PAY FOR ONLINE NEWS



8% (-1)
(=29th/35)



USE AN AD-BLOCKER

26% (+4)
(=14th/36)

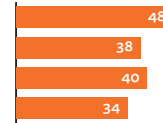
BRAND ATTRIBUTES ENGLISH

% of CBC users who say it is best for...



BRAND ATTRIBUTES FRENCH

% of TVA users who say it is best for...



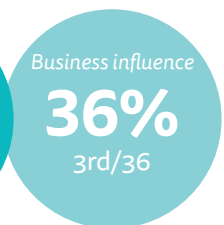
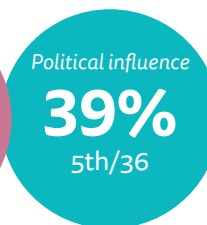
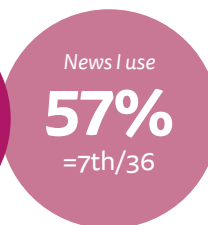
TRUST

Canadians are concerned about unreliable information and fake news, especially since the US election campaign where such content was widely circulated. A recent study suggests that most of them believe that social media have a negative effect on the news.⁶⁹ But their level of trust in the media remains relatively strong in comparison to other countries.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	40% (-6)	68%
2	YouTube	18% (+1)	57%
3	Twitter	11% (-1)	22%
4	Facebook Messenger	8%	38%
5	Instagram	5% (+2)	22%

CHILE



The news media in Chile are extremely centralised, with the main newspapers, both paid and free, and TV and radio stations based in the capital city, Santiago.

During recent years, the most important players in the news media have been the free-to-air television stations, particularly the four with the largest audience: the public broadcaster, Televisión Nacional de Chile (TVN), and three commercial TV stations, Canal 13, Mega, and Chilevisión. Historically Chile's main television channels were owned by and had their roots in the university sector, although in practice programming was similar to that found in the private sector. But in 2016, the last university-owned broadcaster was sold to a group linked with Disney, making Chile's TV industry much more like stations elsewhere in Latin America.

The transition to digital terrestrial television has been slow, although it is expected that in 2017 the national channels will be present in all regional capitals. Our data show that broadcasters are still the preferred way of consuming news, but many have lost a significant amount of weekly reach in the transition to online. Mega for example reaches over half (53%) of our Chilean respondents on TV, but only 16% through the online versions of its main news programme, *Ahoranoticias*. Canal 13 reaches 55% via television but just 13% visit t.13, the online version of news programme Teletrece.

A key issue for debate has been the role of public broadcasting since TVN lost its ratings lead, prompting changes in the executive governance arrangements for the station. Although TVN is independent of government, President Bachelet announced a \$75m support package to help with the technological challenge of digital television switchover and to fund the creation of a new public and free-to-air TV station for educational and cultural content. In the months that followed, TVN improved its ratings, partly thanks to its coverage of the Olympic Games in Rio, as well as the main news programme, and some new soap operas. But by the end of the year, TVN remained in fourth place, behind the private broadcasters Canal 13, Chilevisión, and Mega.

The top five online media brands are linked with printed media. Emol and LUN belong to the Chile's mainstream newspaper *El Mercurio*, and La Tercera.cl is the online version of the tabloid *La Tercera*, principal competitor of *El Mercurio*. In the third place is Biobiochile.cl, the website of radio station BioBio, which has branched out from audio to become a multimedia hub using extensive text, images, and video. This appears to have paid off, as other radio sites, such as Cooperativa and ADN, appear lower down in our rankings.

In online media, two cases stand out: El Mostrador and El Ciudadano. Both produce high-quality opinion and analysis and are valued for their coverage of the complexities of Chilean politics.

STATISTICS

Population	17m
Internet penetration	80%

Official data (Subtel) shows that nearly 80% of all internet access is made from a mobile phone.⁷⁰ Chile therefore leads the use of smartphones in Latin America and in our survey around three-quarters of respondents (76%) say they use mobile phones to access news weekly. A study from the main mobile phone provider in Chile shows that around 90% of smartphone users actively use Facebook, and 85% use Google, YouTube, and WhatsApp. These numbers help explain why Facebook and WhatsApp are the most important social media and messenger brands for news access. Most broadcast brands have started to use WhatsApp voice messaging to engage with their audiences, particularly radio stations as such BioBio, Cooperativa, and ADN.

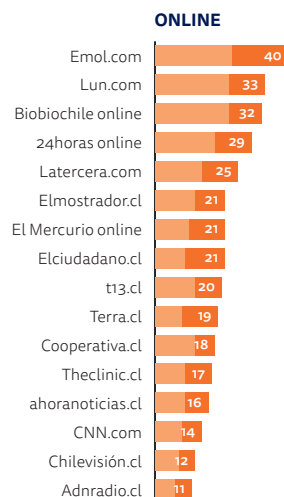
Francisco Javier Fernández Medina
and **Eduardo Arriagada**
Pontificia Universidad Católica de Chile

⁷⁰ Accesos a Internet llegan a 13,1 millones y uso de smartphones sigue en alza según estadísticas de telecomunicaciones: <http://www.subtel.cl> (20 Apr. 2017).

TOP BRANDS

% Weekly usage

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



PAY FOR ONLINE NEWS

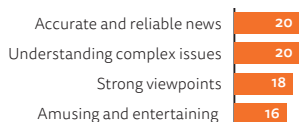


9%

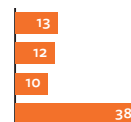
(=25th/35)

BRAND ATTRIBUTES

% of Emol.com users who say it is best for...



% of Lun.com users who say it is best for...

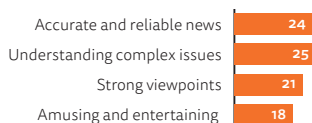


USE AN AD-BLOCKER

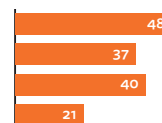
24%

(=16th/36)

% of T13 news who say it is best for...



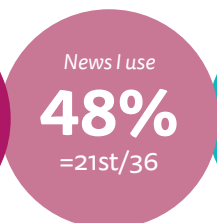
% of BioBioChile users who say it is best for...



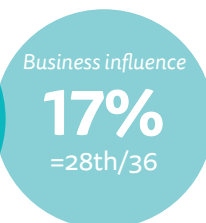
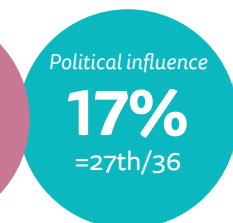
TRUST

News media, mainly broadcasters and digital-born, often use WhatsApp as a source, sometimes without properly verifying the source. In order to attract the audience's attention, it is not uncommon to include viral content from social media as part of mainstream content, which has led to concerns about declining quality.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	70%	83%
2	WhatsApp	39%	76%
3	YouTube	25%	72%
4	Twitter	23%	33%
5	Facebook Messenger	14%	48%

MEXICO



Historically, television and radio have been the most influential media for both news and entertainment in Mexico. Now, traditional media are facing competition from digital-born media companies and international tech platforms.

Public television did not develop in the same way as in some Western and Northern European countries, and Grupo Televisa monopolised commercial television during the 20-year period from 1973 to 1993. TV Azteca was the first company that successfully managed to overcome entry barriers and become an alternative source of news and entertainment. Since then, the media industry has broadened thanks to the liberalisation of the telecommunications market and digital technologies.

Currently, América Móvil, Televisa, TV Azteca, Grupo Imagen, Grupo Radio Centro, and Grupo Multimedios are the leading companies in terms of both audience reach and share of the advertising pie. However, the traditional press – which is primarily regional rather than national – is also represented by a small group of Mexican companies, including Organización Editorial Mexicana (OEM), El Universal, Grupo Milenio, Grupo Reforma, and El Financiero, that publish a variety of different newspapers brands in local markets.

All of these companies are usually associated with traditional media, but also have an active presence online in the form of legacy and digital-born brands. Grupo Televisa, once dominant, has now largely lost its position as the opinion leader, although it is still present. Through Televisa News online and the purchase of SDP News online, it is now trying to regain its position in the digital news market.

International brands, such as CNN and Yahoo News, have a strong foothold in the online Mexican news market. Domestic digital-born news brands have recently emerged in Mexico, and are increasing their audience reach. The most widely used include SDP News (recently acquired by Grupo Televisa in March 2017), UnoTV (América Móvil), Aristegui News, Sin Embargo, Cultura Colectiva, Digital López Dóriga, Political Animal, and La Crónica.⁷¹

Aristegui News, named after the leading left-wing journalist Carmen Aristegui, is of particular note as it is the most widely used online news brand in our survey (41%). Much of their output is investigative, and they have been associated with numerous high-profile stories on topics like drug trafficking, corruption, and sexual abuse within the Catholic Church, but have also been accused of causing moral damage and misusing freedom of speech. Aristegui herself has become a major public figure in Mexico over the years after her high-profile work for CNN in Spanish, Grupo Reforma, MVS, Grupo Imagen, Imevisión (now TV Azteca), and on university television in charge of National Polytechnic Institute (IPN).

STATISTICS

Population	123m
Internet penetration	56%

Though we should remember that internet penetration in Mexico is comparatively low (56%), social media (72%) are an important source of news for those that do have access, partly due to low levels of trust in traditional news corporations. Facebook and WhatsApp are particularly popular, not least because access comes bundled with smartphone internet access at no additional cost. This is one of the reasons why, in common with other Latin American countries, the smartphone (70%) is now more widely used for digital news access than the computer (45%).

The most serious problem facing journalists is freedom of expression and the constant threat they face when they cover political corruption and drug trafficking. Murders, kidnappings, and other threats are not unusual. In 2016 11 journalists were killed, making it the most violent year on record. In 2017, the murder of 54-year-old journalist Miroslava Breach Velducea, prompted the owner to close *El Norte de Ciudad Juárez* after 27 years of operation. This was the first time in Mexico's history that a newspaper was closed for these reasons.

Fake news is not uncommon in Mexico. Recent stories include the supposed death of Xavier López 'Chabelo', director and host of the children's programme *En domingo con Chabelo*, selfies of Pope Francis, and the death of Carmen Aristegui. Fake news is typically disseminated on social media, but there are sites, such as *ElDeforma*, that are devoted to it.

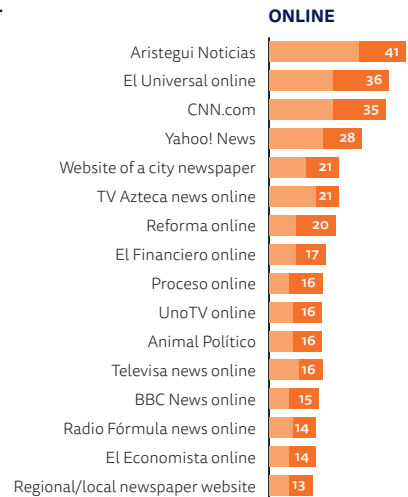
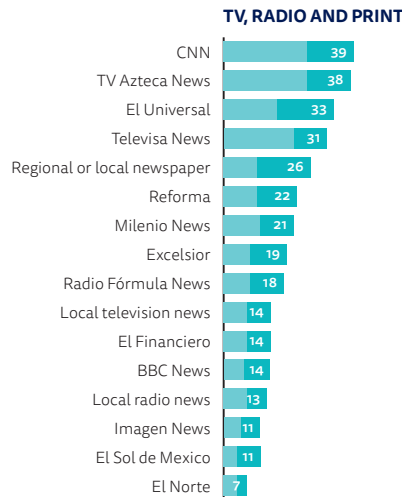
María Elena Gutiérrez Rentería
Universidad Panamericana

⁷¹ D. Bermudez, Ranking de medios nativos digitales. *El Economista* (2017). Retrieved from <http://eleconomista.com.mx/especiales/comscore/2017/03/03/ranking-medios-nativos-digitales>

TOP BRANDS

% Weekly usage

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



PAY FOR ONLINE NEWS



18%

(=6th/35)

BRAND ATTRIBUTES

% of Aristegui Noticias users who say it is best for...



% of TV Azteca users who say it is best for...

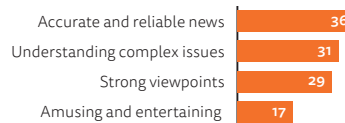


USE AN AD-BLOCKER

27%

(=9th/36)

% of CNN.com users who say it is best for...



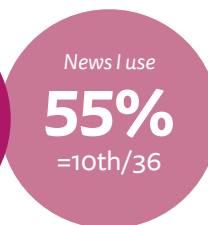
% of El Universal users who say it is best for...



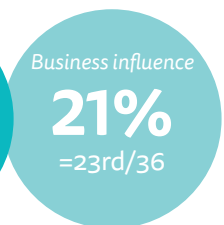
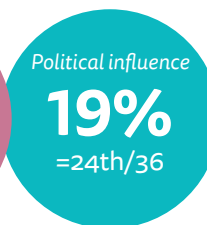
TRUST

Low trust in news is linked to a perceived lack of credibility in societal institutions as a whole. For decades, the media were characterised by a close relationship with the government and political parties. But beginning in the 1990s, some newspaper companies managed to build their prestige on greater transparency in their editorial line, and journalism unrelated to economic and political interests.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	63%	78%
2	YouTube	39%	81%
3	WhatsApp	34%	77%
4	Twitter	23%	40%
5	Facebook Messenger	16%	58%



Asia Pacific

4.30	Australia	116
4.31	Hong Kong	118
4.32	Japan	120
4.33	Malaysia	122
4.34	Singapore	124
4.35	South Korea	126
4.36	Taiwan	128

AUSTRALIA



The Australian market is one of the most concentrated in the world with two powerful newspaper groups and strong commercial and state-funded broadcasters struggling with the transition to digital.

The Australian broadcast market is graced by not one but two state-funded players: national broadcaster the ABC and the more specialised SBS. Perceived by critics as somewhat left-leaning, the ABC brand remains one of the most trusted sources for news for those that use it and the organisation's leadership takes the digital space seriously, evidenced by last year's appointment of former Google executive Michelle Guthrie to the role of ABC Managing Director. Guthrie announced in March cuts of around 200 by June as part of a major restructure, which will enable a new AU\$50m Content Fund.⁷² The cuts are also meant to fund 80 new editorial jobs in regional Australia to boost rural and regional coverage.

By contrast, News Corp Australia, which publishes *The Australian*, *The Daily Telegraph*, and *The Herald Sun* has announced significant cuts to staff – including journalists and photographers – as part of an AU\$40m cost-cutting exercise.⁷³

Fairfax Media, which owns *The Sydney Morning Herald* and *The Age* has also shed around 100 jobs as part of a restructuring package announced last year; at time of writing (early April 2017) a number of

commentators are suggesting that a private capital firm is interested in acquiring Fairfax, particularly its Domain.com real estate advertising business. Meanwhile News Corp has further expanded its print and broadcast portfolio via the purchase of APN regional newspapers and the Australian News Channel, producer of Sky News in Australia and New Zealand.

To further underline the importance of the regional market, terrestrial TV stalwart the Nine Network has severed its programming agreement with regional broadcaster WIN after 27 years. WIN continues to provide local news bulletins and Nine has announced the roll-out of 15 rival regional news bulletins.

All these changes are taking place against the backdrop of a proposed relaxation of cross-media ownership rules announced by the centre-right Turnbull government in March 2016.⁷⁴ Alongside the public broadcasters ABC and SBS, Australia's traditional media environment includes three commercial terrestrial TV networks, the Foxtel cable/satellite/IPTV network plus multiple commercial radio networks. Current regulation blocks any single entity controlling more than two of out of three traditional platforms (commercial radio, commercial television, and associated newspapers) within one commercial radio licence area – the so-called two out of three rule.

Relaxation of this rule could open the door to mergers between national and regional TV stations as well as rationalisation of the commercial radio market.

STATISTICS

Population	23m
Internet penetration	92%

The likely impacts on plurality and diversity of voice are harder to discern. On one hand Australia already features one of the highest concentrations of print ownership of any Western democracy, with only two main players – News Corp Australia and Fairfax. Others argue that Australia's high level of smartphone penetration and near-universal internet access in urban areas mean that plurality and diversity are already delivered via online, mobile, and social platforms to the majority of the population. Our data confirm that online news is reported as the main source of news by 43% of respondents, ahead of TV (36%) and well ahead of print and radio.

Traditional print brands are still read online by half (49%) of our Australian sample each week, but only around one in ten (13%) are prepared to pay for online news. Although internet advertising continues to move online – one PwC forecast sees it rising to 51% of the total ad market spend by 2020 – these revenues are not enough to compensate for accelerating loss of revenues from print.

Local news brands also face increased competition from overseas brands, which have developed a significant Australian presence including local versions of UK mastheads the *Guardian* (2013) and the *Mail Online* (2014) as well as American sites BuzzFeed (2014) and the *Huffington Post* (2015). In 2017 the *New York Times* will also open a new bureau in Sydney which will house a small local editorial team tasked with increasing the brand's reach and revenue.⁷⁵

Caroline Fisher, Jerry Watkins,
and **Michelle Dunne Breen**
News & Media Research Centre,
University of Canberra

⁷² <http://www.abc.net.au/news/2017-03-07/michelle-guthrie-unveils-abc-restructure-plan/8330878>

⁷³ <https://www.theguardian.com/media/2016/dec/07/news-corp-australia-announces-redundancies-and-fresh-cost-cutting>

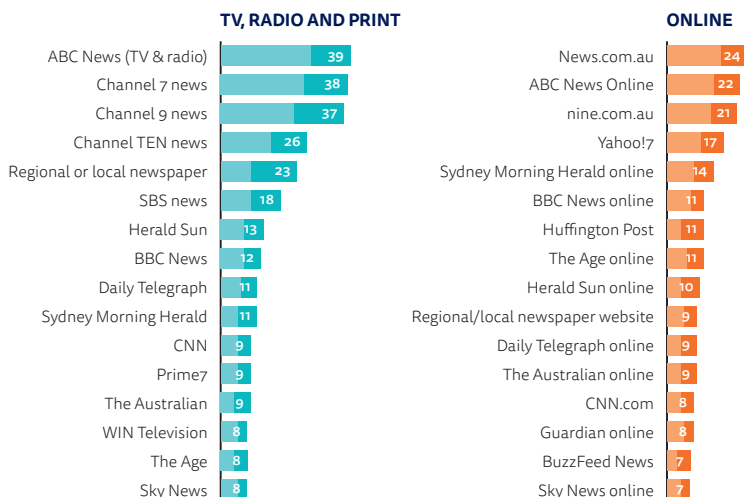
⁷⁴ http://www.minister.communications.gov.au/mitch_fifield/news/modernising_australian_media_laws

⁷⁵ <http://www.niemanlab.org/2017/01/the-new-york-times-is-opening-a-full-bureau-in-sydney-australia>

TOP BRANDS

% Weekly usage

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

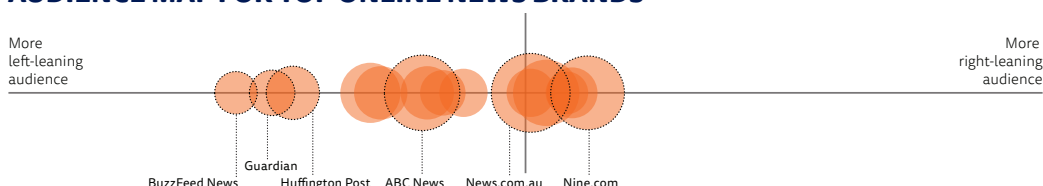


PAY FOR ONLINE NEWS



13% (+3)
(=14th/35)

AUDIENCE MAP FOR TOP ONLINE NEWS BRANDS



USE AN AD-BLOCKER

24% (+1)
(=16th/36)

BRAND ATTRIBUTES

% of ABC users who say it is best for...



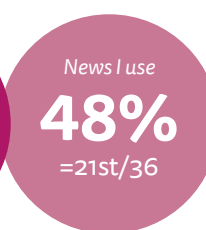
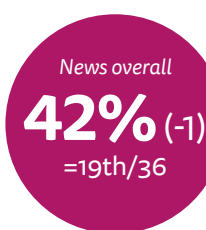
% of BuzzFeed News users who say it is best for...



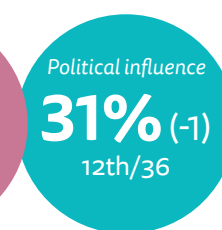
TRUST

The level of general trust in news media has remained relatively stable at 42%. Over half (56%) of Australian respondents try to avoid the news either sometimes, often or occasionally. Women avoid news more often than men. A key reason provided for this avoidance by our respondents is that news can have a negative impact on mood.

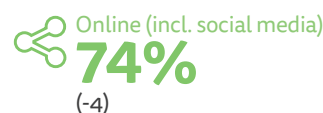
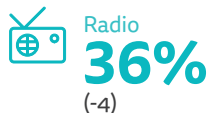
MOST OF THE TIME I TRUST...



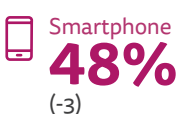
THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	39% (-6)	68%
2	YouTube	15% (-)	50%
3	Twitter	8% (-)	17%
4	Facebook Messenger	8%	38%
5	WhatsApp	7% (+3)	20%

HONG KONG



The media environment is marked by the presence of a dominant free-to-air television broadcaster (TVB) along with a wide range of free and paid newspapers (including their websites), broadcast stations, and online news sites.

All sectors of the Hong Kong media face increasing challenges to generate revenues and maintain financial viability due to a fragmented audience, competition for advertising money and a continuing shift towards online news consumption. More than 80% of the population use online sources for news. The aggregator Yahoo! News is popular (43%), but an even larger proportion of respondents come across news stories via social media (60%). Print is the least used source at 48%.

Hong Kong newspapers have been hard hit. Falling circulation, declining ad spending, and competition from the free dailies resulted in the closure of two long-established brands: *Hong Kong Daily News* and *The Sun*, in 2015 and 2016 respectively. The top two mass-oriented newspapers, *Oriental Daily* and *Apple Daily* dominate the print market and have successfully moved their brands online. Free dailies including *Headline Daily*, *AM730*, *Skypost*, and *Metro Daily* continue to be popular sources of news offline and online, though the quality and professionalism of their content has been subject to some criticism. The *South China Morning Post*, established in 1903, is the sole English-language daily, and was acquired by

the Alibaba Group in 2016. The newspaper subsequently removed the paywall so the online edition is essentially free even though it still charges for the print edition.

Online alternative news brands have grown rapidly in the past decade as dissatisfaction with the mainstream press, due to perceived political interference from China, has opened an audience niche for more opinionated news coverage. Some online news sites such as *Stand News* and *PassionTimes* are often critical of the government, while more recent entrants such as *HK01* and *Citizen News* have a more general interest orientation. Although these online brands do have a sizeable audience, they are not recognised by the government as legitimate media organisations and so are banned from government press events. The Hong Kong Journalists Association has appealed for some of these brands to be given full media access privileges for the 2017 Hong Kong Chief Executive Election (especially to enter the press area at the venue where the election result is announced) but the government has stood firm.

In terms of ratings of online news providers, *Apple Daily's* pro-democracy outlook means a high proportion of its users rate it positively for reliable and accurate news. By contrast, TVB is seen by many citizens as politically conservative. Some citizens even call the broadcaster CCTVB, referencing the state organ CCTV (China Central Television) in the mainland. *Apple Daily* was also rated particularly highly as best for being amusing and entertaining. This is likely to be closely related to its *Motion News* format, which uses videos, graphics, and computer animations to construct sometimes

STATISTICS

Population	7.4m
Internet penetration	82%

sensational, sometimes humorous, and sometimes satirical audio-visual news reports.

The television market also faces many challenges. The closure of cash-strapped Asia Television (ATV) coincided with the establishment of *ViuTV*, the free television service arm of the pay-TV service provider *NowTV*. Nonetheless, *Television Broadcasts Limited* (TVB) remained the overwhelmingly dominant player in the free TV market. This is reflected in its top rating for offline and online news. However, TVB quit the pay-TV market following years of heavy losses, leaving *NowTV* and *i-Cable* as the only pay-TV providers. As of late April 2017, the parent company of *i-Cable* has found a new group of investors willing to buy the station.

Hong Kong's only public broadcaster *Radio Television Hong Kong* (RTHK) remains an important source of news, particularly through its radio broadcasts. It established its online presence very early in 1994 and since then all of its TV and radio content has been available online. In 2016 it also became the sole provider of digital radio broadcasting following the decision of other providers to return their licences to the government rather than compete in a market that had few people willing to pay for digital radios.

Despite the proliferation of 'free' online content, Hong Kong ranks comparatively high for paid online content. This is mainly because access to prominent brands such as BBC, CNN, and *Hong Kong Economic Times*, require some form of subscription, and many online alternative news brands solicit donations from the public.

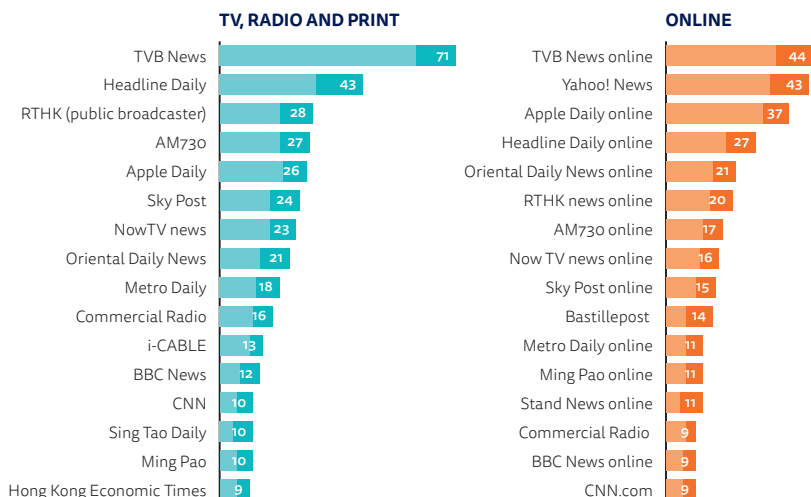
Michael Chan, Hsuan-Ting Chen
and **Francis Lee**

Chinese University of Hong Kong

TOP BRANDS

% Weekly usage

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



PAY FOR ONLINE NEWS

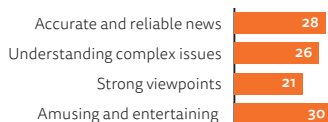


21%

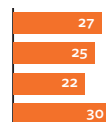
(3rd/35)

BRAND ATTRIBUTES

% of TVB News users who say it is best for...



% of Yahoo! News users who say it is best for...



USE AN AD-BLOCKER

17%

(=33rd/36)

% of Apple Daily users who say it is best for...



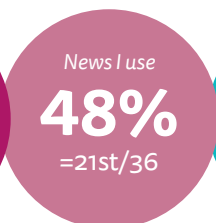
% of Headline Daily users who say it is best for...



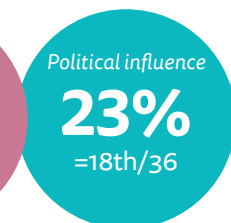
TRUST

In longitudinal polls, the perceived credibility of most news organisations has been declining. While perceived commercial influence also affected people's trust in news brands, in recent years, trust in news brands has been affected mainly by perceptions of political pressure and media self-censorship, with several mainstream media organisations being criticised particularly heavily by citizens.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	54%	80%
2	WhatsApp	36%	80%
3	YouTube	29%	66%
4	WeChat	14%	46%
5	Instagram	7%	32%

JAPAN



STATISTICS

Population	126m
Internet penetration	94%

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

Japanese newspapers still sell over 40m copies each day, amongst the highest number in the world, with more than 95% of papers still bought through subscription. As elsewhere, though, circulation is gradually falling and the industry lost around 1m further copies in 2016.⁷⁶ Newspaper sales per household have fallen from as high as 1.13 in 2000 to just 0.78 today. With the readership ageing, many publishers are now offering student or children's editions as well as creating children's pages in the main paper.

Partly because print remains so profitable, newspaper groups have been slow to develop online audiences and digital businesses. Yahoo Japan (53% weekly reach) remains by far the most popular online gateway to news, by aggregating and republishing content from traditional sources.

In recent years, however, there has been a new focus on digital, particularly from newspapers like *Asahi Shinbun* and *Nikkei*, the world's largest business daily. *Nikkei* bought the *Financial Times* in 2015, partly to learn from its expertise in building digital subscribers. It now includes more *Financial Times* stories in its print and online editions, a move that has helped it build new digital paying subscribers to a total of more than 500,000.

Ten months after its launch, digital-born player BuzzFeed Japan made its presence felt with an eye-opening media scoop. The online magazine, set up as a joint-venture between BuzzFeed US and Yahoo! Japan, published an investigative report in October about online plagiarism and false information in a popular health and medical information website, WELQ. BuzzFeed's story revealed that stories were often taken from other websites and that many were not supported by scientific evidence. BuzzFeed also revealed that these stories were produced by inexperienced part-time 'writers', who had been told by editors how to avoid detection. Similar plagiarism was later found in all ten information websites run by the website's owners, a listed company called DeNA. The company suspended the websites.

Public broadcaster NHK was also accused by an online publication, the *Business Journal*, of running a false story about the economic hardship of a family of a female high school student. But NHK hit back saying that in turn the article criticising the story had fabricated a quote from an NHK spokesperson. The *Business Journal*'s story turned out to be untrue and based merely on rumours from digital and social media. The *Journal* retracted it and published an apology.

More generally, tabloid-type magazines in Japan have had a good year both in print and online. Weekly *Bunshun* has been dubbed 'Bunshun Cannon' for its relentless exposes of politicians and celebrities. Its digital edition can be purchased via monthly payment through the blogs and magazines section of Nico-Nico Douga ('Smily Video'), which was originally established as video-

sharing platform but has extended its offer to a range of other subscription content. *Bunshun*'s strongest rival weekly *Shincho* distributes its contents through a mobile phone giant NTT DoCoMo's 'd-Magazine' service, in which users can read as much as they want out of 160 titles for 400 yen a month (about US\$4), though some contents are excluded.

Uniquely across all the countries in this report, Facebook (26%) is only the third most popular social network in Japan behind YouTube (46%) and Line (32%). In terms of use for news, Facebook (9%) is beaten into fourth place by Twitter (12%). Part of the explanation for this comes in a survey by the Ministry of Internal Affairs and Communications (MIC) in 2014, which showed that the Japanese are reluctant to use real names in social media, preferring anonymity online. This tendency has also affected the popularity of LinkedIn, which is used by only 1% of respondents.

Competition between mobile news apps and brands continues to intensify in Japan as accessing news via smartphone has grown to almost half (45%) of respondents to our survey. Line has capitalised on its position as the go-to messenger app to attract news readers to its timelines, but also runs a separate Line News service. The Yahoo! News app has almost doubled its monthly user base over the last two years, while SmartNews says that its personalised app had been downloaded 20 million times worldwide.

Yasuomi Sawa

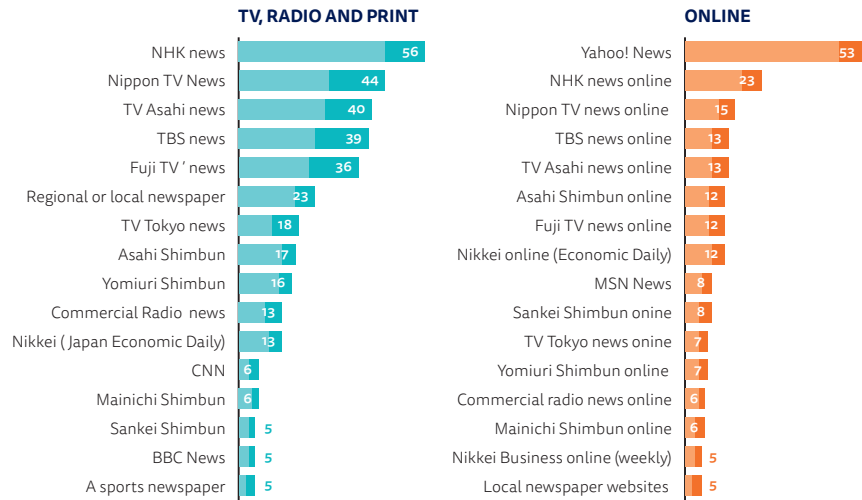
Journalist, *Kyodo News* and former Reuters Institute Journalist Fellow

⁷⁶ Decline between Oct. 2015 and Oct. 2016. <http://www.pressnet.or.jp/english/data/circulation/circulation01.php>

TOP BRANDS

% Weekly usage

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



PAY FOR ONLINE NEWS



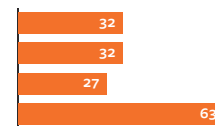
11% (-1)
(=20th/35)

BRAND ATTRIBUTES

% of NHK users who say it is best for...



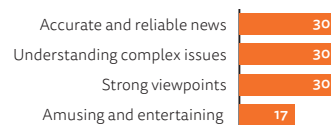
% of Yahoo! News users who say it is best for...



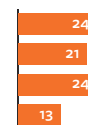
USE AN AD-BLOCKER

13% (+3)
(35th/36)

% of Nikkei users who say it is best for...

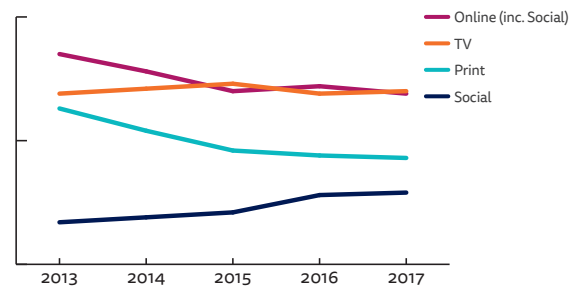
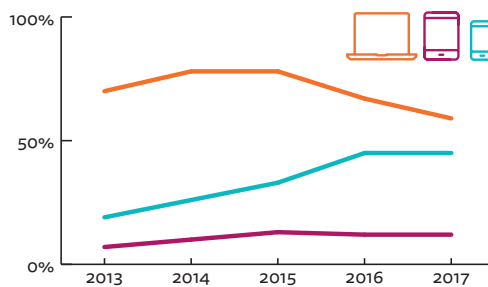


% of Asahi Shinbun users who say it is best for...



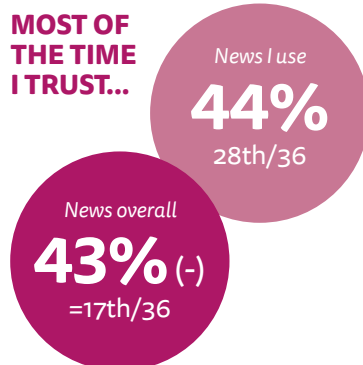
CHANGING MEDIA

TV remains an important source of news in Japan amongst young and old, while newspapers remain an important part of family life. The smartphone revolution started late because of high penetration of earlier feature phones.



TRUST

Historically, Japanese news brands have been widely trusted, but doubts have grown since the 2011 nuclear accident when it was widely felt that the media failed to report the real truth behind the accident. This year's stories about plagiarism and false information are contributing to a wider unease about the quality of journalism.



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	YouTube	17% (-9)	47%
2	Line	13% (-)	32%
3	Twitter	12% (-4)	26%
4	Facebook	9% (-7)	26%
5	Instagram	2% (-)	12%

MALAYSIA



The media environment in Malaysia remains a heavily controlled and censored one, strictly monitored and policed by an authoritarian regime.

Traditional media ownership in Malaysia is heavily concentrated in the hands of institutions and local conglomerates that are aligned to or owned by the Barisan Nasional (BN) government. One corporation, Media Prima, owns all four of Malaysia's free-to-air commercial television stations and three newspapers (*Harian Metro*, *Berita Harian*, the *New Straits Times*). Media Prima is an investment company of the United Malays National Organisation (UMNO), the dominant political party in the ruling BN coalition. The largest circulation English-language newspaper, *The Star*, is owned by the Malaysian Chinese Association (MCA), another key party of the BN.

There is a slew of laws that constrain both traditional and online media from being critical of the regime. One of these, the Sedition Act (1948), was widely used in 2015 and 2016, leading to the detention of more than 150 Malaysians, including journalists.

Despite these political, legal, and economic constraints, the internet and social media have continued to grow after the regime launched the Malaysian Multimedia Super Corridor (MSC) in 1996. Internet penetration rates have increased tremendously since then, while internet news media, like Malaysiakini,

FreeMalaysiaToday, and the new *The Malaysian Insight*, have captured the imagination of an increasingly urbanised Malaysian public. Many have attributed this growth to the Bill of Guarantees that came with the launch; a pledge by the regime that the internet will not be censored. However, use of other legal constraints – including the Sedition Act – to harass and detain journalists, academics, politicians, and activists has, in reality, voided that 'guarantee'.

2016 witnessed one of the most unfortunate closures in the Malaysian media industry, that of *The Malaysian Insider* (TMI), a news portal that, since its establishment in 2007, had risen rapidly to rival the more established Malaysiakini (est. 1999). The official reason for the closure was economic, as TMI was incurring extensive losses that its financial backers, the Edge Group, could not sustain. However, political reasons were also clearly evident, with the site having been blocked by the Malaysian Communication and Multimedia Commission (MCMC), the state regulatory body.⁷⁷

Television news continues to hold on to audiences, especially in the rural areas, often described as 'the Malay heartland'. Over the past year, the commercial TV station, TV3, has continued to dominate the airwaves, not necessarily because of its news content but because of its more catchy presentation style – predominantly aimed at a rural, ethnic Malay audience – which has enabled it to do better than the staid, state-owned television station Radio Television Malaysia (RTM) for more than two decades.

STATISTICS

Population	31m
Internet penetration	70%

Newspaper circulation continued to fall in 2016, with the English-language *New Straits Times* and once hugely popular Malay daily, *Utusan Malaysia*, recording ongoing losses. Both newspapers have not recovered from their loss of credibility from the late 1990s onwards. Their unyielding support of the regime, despite the latter being hit by a series of scandals in 2016, made them lose large segments of the rising middle-class Malaysian audience.

Malaysia's growing internet penetration rate is certainly one of the main reasons why online news portals have become the medium of choice for many for a variety of news – amusing, complex, opinionated, and even political. Indeed, three factors are central to this development: the declining credibility of the mainstream media, the spread of a purportedly 'free' and 'independent' digital media environment, and the easier and more-immediate access to these news sources.

'Fake news' has been around in Malaysia for years. For opposition groups, the term describes regime propaganda; something that has been churned out since at least the 1960s when state television was introduced into Malaysia and when UMNO took ownership of the *Utusan* media group. The regime, on the other hand, clearly capitalising on recent Western official critiques of fake news, has turned the argument around to help counter questions and critiques posed by news portals such as Malaysiakini, the London-based *Sarawak Report*, and even international news agencies. A new portal, *Sebenarnya* (the truth), was set up in March this year by the MCMC purportedly to enable Malaysians to check the validity of news.⁷⁸ There has been talk also of greater legal policing of social media and new legislation is anticipated in 2017.

Zaharom Nain

Centre for the Study of Communications and Culture, University of Nottingham Malaysia Campus

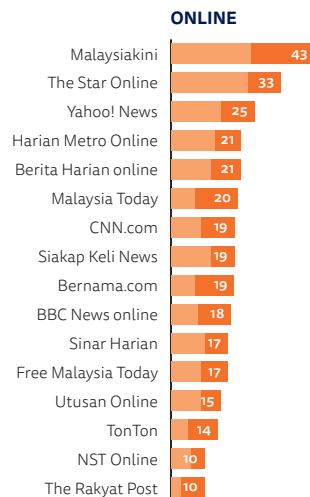
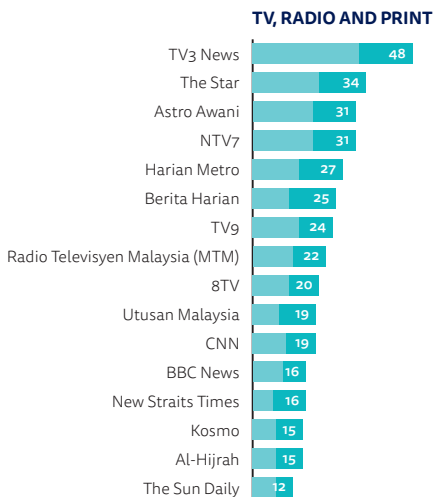
⁷⁷ BBC News, *Blocked Malaysian Insider News Website Shuts Down* (Mar. 2016): <http://www.bbc.com/news/world-asia-35800396>

⁷⁸ <http://www.thestar.com.my/news/nation/2017/03/14/sebenarnya-portal>

TOP BRANDS

% Weekly usage

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



PAY FOR ONLINE NEWS

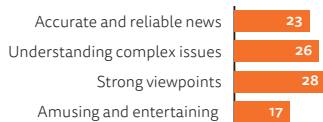


20%

(=4th/35)

BRAND ATTRIBUTES

% of Malaysiakini users who say it is best for...



% of The Star Online users who say it is best for...

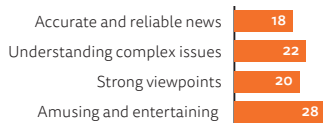


USE AN AD-BLOCKER

27%

(=9th/36)

% of Yahoo! News users who say it is best for...



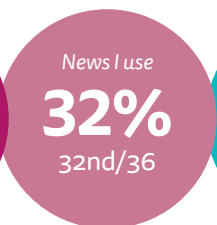
% of Harian Metro users who say it is best for...



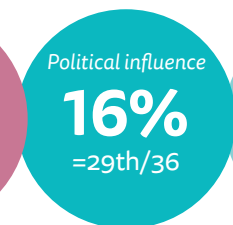
TRUST

The Malaysian public has trust issues with local media. State/regime ownership and control of much of these media, coupled with their constant manufacturing of falsehoods and crude regime propaganda, are the main reasons for this distrust. Many subsequently turn to social media for news.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	58%	74%
2	WhatsApp	51%	77%
3	YouTube	26%	63%
4	WeChat	13%	29%
5	Instagram	13%	37%

SINGAPORE



STATISTICS

Population	5.7m
Internet penetration	81%

Digital news sites and social media serve as Singapore's primary sources of news, with three-quarters of the country accessing news through smartphones.

Singapore has two main legacy media organisations, the commercial Singapore Press Holdings (SPH) and the state-owned MediaCorp. Both of these conglomerates dominate the traditional and digital news market. SPH publishes most of Singapore's local newspapers, including the flagship English-language *Straits Times* and Chinese-language *Lianhe Zaobao*, Malay-language *Berita Harian*, and Tamil-language *Tamil Murasu*. Overall readership of SPH newspapers fell slightly to 2.43 million in 2016, from 2.6 million in 2015. However, digital circulation for most of its newspapers increased, offsetting decreases in print. During the past year, combined print and digital circulation increased for newspapers such as *The Straits Times*, *Business Times*, and *The New Paper*.⁷⁹

SPH's strategy involves a push towards more digital offerings, while providing advertisers audience reach across multiple platforms. In 2016, SPH revamped *Zaobao* and its English-language tabloid, *The New Paper (TNP)*. *Zaobao* created a new mobile-responsive website and an app that reads articles aloud, catering to readers who understand but have difficulty reading Chinese. TNP merged with SPH's free bilingual morning commute *MyPaper*.

Though *Straits Times* remains ahead as the leader among news brands, other SPH newspapers face stiff competition from MediaCorp, local news sites, and international news organisations including BBC News, CNN, Huffington Post, and BuzzFeed news. In 2016, SPH announced a staff cut of up to 10% over two years through attrition, retirement, non-renewal of contracts, outplacement, and retrenchment.

The state-owned MediaCorp produces Channel NewsAsia, a 24-hour English news channel, as well as news in Chinese, Malay, and Tamil for local TV and radio broadcast. It also publishes the free *Today* newspaper. In August 2016, MediaCorp's Toggle, its over-the-top (OTT) service, recorded over 11 million video views for live and repeat telecasts of four large events such as the National Day Parade. The strong viewership indicates growing demand for the use of digital, on-demand platforms to access live events.

The online news landscape in Singapore operates on a licence basis. All internet content providers are automatically licensed under the Broadcasting Act, and must comply with Class Licence conditions and the Internet Code of Practice. In 2013, the Online News Licensing Scheme was introduced to require news websites to be individually licensed if they report an average of at least one article per week on Singapore news and current affairs over a period of two months and are visited by at least 50,000 unique IP addresses from Singapore each month over the same period. Websites are then required to remove content which is in breach of content standards within 24 hours and post a performance bond of S\$50,000.

Apart from large news sites that fall under the requirement, like SPH and MediaCorp news units, independent news sites whose smaller readership do not meet licensing criteria have also been asked to register for a class licence under the Broadcasting Act. Socio-political news sites Mothership.sg, Independent.sg, The Middle Ground, and The Online Citizen were among the independent outlets licensed. Since then, these sites have become mainstays in Singapore's digital news landscape – e.g. the monthly readership of Mothership.sg has increased to 3.8 million.

In 2016, the co-founders of the popular website The Real Singapore were convicted for fabricating news that sowed discord between Singaporeans and foreigners. Such examples have alarmed the Singapore government, which announced in April 2017 that it is reviewing laws to tackle false news reporting.

More broadly, the majority (85%) of Singaporeans reported going online for news, with 61% obtaining news from social media. Only slightly more than half turn to print (53%) and TV (57%) for news. Three-quarters of Singaporeans access news on their smartphones. Despite their preference for digital news, only a small percentage (16%) were willing to pay for online access. SPH operates different paywalls including a metered paywall for *The Straits Times* and a freemium model for *The Business Times*. Other publications including *Zaobao* and *TNP* are free. MediaCorp news sites are free.

Debbie Goh Pei Chin

Assistant Professor, Nanyang Technological University, Singapore

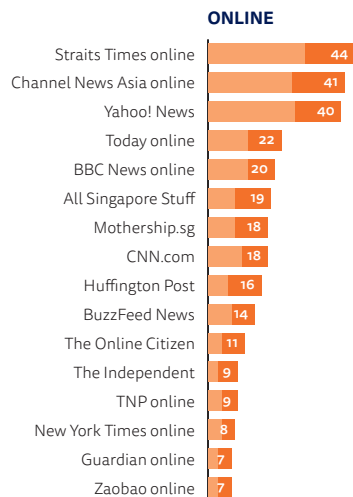
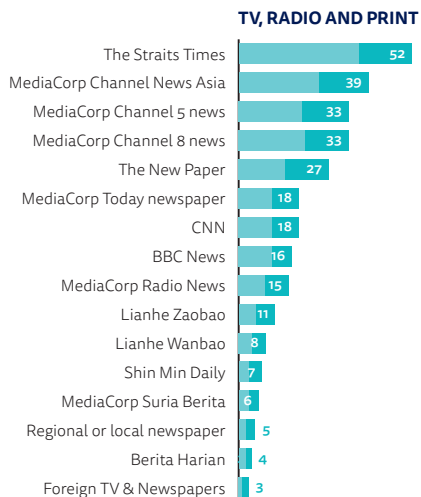
⁷⁹ http://sph.listedcompany.com/misc/annualreport/2016b/SPH_AR2016_daily_average.pdf

⁸⁰ C. Soon and N. Samsudin, Media Use and Political Participation. In C. Soon, T. H. Tan, and N. Samsudin (eds), *Media and Internet Use during General Election 2015*. Singapore: Institute of Policy Studies, 2016, pp. 27–55.

TOP BRANDS

% Weekly usage

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



PAY FOR ONLINE NEWS



16%

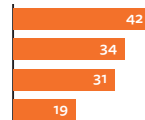
(=7th/35)

BRAND ATTRIBUTES

% of Straits Times users who say it is best for...



% of Channel News Asia users who say it is best for...



USE AN AD-BLOCKER

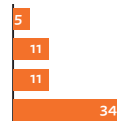
24%

(=16th/36)

% of Yahoo! News users who say it is best for...



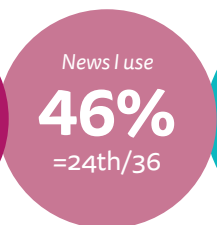
% of Mothership.sg users who say it is best for...



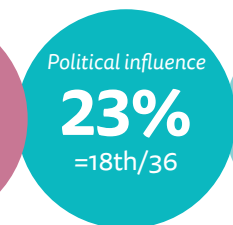
TRUST

Singaporeans have relatively low trust in the news compared to other countries (42%) and only a quarter perceive news to be free from political or commercial influences. For election news, however, Singaporeans trust the traditional news outlets more than alternative news sources like social media and digital-born outlets.⁸⁰

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	55%	77%
2	WhatsApp	38%	80%
3	YouTube	26%	70%
4	Instagram	9%	42%
5	Facebook Messenger	8%	33%

SOUTH KOREA



Korean broadcasters and newspapers played a key role in the recent impeachment of the president, but their business is struggling online as powerful Korean-owned online portals, social networks, and messaging apps control access to news.

Portal sites such as Naver (64%) and Daum (36%) are the most popular news outlets in South Korea, eclipsing the websites of newspapers and broadcasters as well as social networks like Facebook (28%). These companies also dominate advertising revenue. In 2016 Naver alone generated US\$2.7bn, which is more than newspapers (US\$1.5bn) and terrestrial broadcasters (US\$1.1bn) put together. In addition to news, portals offer web search, email, computer games, and shopping. Naver is also the creator of the messaging app Line, while Daum operates chat app Kakao Talk along with the social networking site Kakao Story.

Two years ago, Naver and Daum jointly formed a Committee for the Evaluation of News Partnership to manage the quality of news displayed on their websites. The Committee determines the eligibility of news providers who want to supply content, and penalises those that are judged to violate ethical standards. This process has helped to significantly reduce the manipulation of search results through keyword stuffing and other bad practices. However, the Committee has been criticised for prioritising the interests of platforms over publishers. As one example, news providers are still not able to

publish sponsored content through these portal sites.

As a result, calls for transparency and accountability of platforms are becoming louder. News providers in particular would like to understand more about how their powerful recommendation algorithms work. In 2016, the Korea Press Foundation launched a News Trust project to investigate ways in which high-quality content is prioritised in news recommendation algorithms.

With the print business in decline, legacy newspapers are rushing to transform themselves into digital-first enterprises. Newspaper *JoongAng Ilbo* has built an integrated newsroom consisting of three sections – Command, Intake, and Output. It now encourages reporters to publish news articles online-first, with print coming later in the process. Similar strategies are being planned by *Hankyoreh Shinmun*, *Hankook Ilbo*, *Donga Ilbo*, etc.

By contrast broadcast brands have tended to shun integration, building dedicated digital teams instead. KBS has created a unit to adapt its television news video for online. SBS has established an independent digital brand Subusu News on Facebook to appeal to the younger generation, while cable channel YTN has also been successful in engaging users with video content on Facebook.

In an effort to diversify revenue streams, some newspapers have been working with Naver to build new services based on information and data such as jobs, travel, movies, and agriculture. *Chosun Ilbo* created

STATISTICS

Population	51m
Internet penetration	89%

a recruitment service called 'Job &' that attracted more than one million job-seeking subscribers in a month. *Hankyoreh Shinmun* and Naver started a movie information service based on content and listings from its cinema magazine. *Chosun Ilbo* and *Maeil Business Newspaper* are testing the potential of Virtual Reality (VR) and Augmented Reality (AR) for enhanced storytelling and for business opportunities.

The news media have played a critical role in South Korea's dramatic recent political crisis. Broadcaster JTBC, along with newspapers *Chosun Ilbo* and *Hankyoreh Shinmun*, led in accusing the Park administration of pervasive political corruption, and this resulted in the unprecedented impeachment of a president. By disclosing evidence of corruption and cronyism, cable channel JTBC has become the most trusted and popular offline brand (60%), leaving the public service channel KBS (44%) a considerable distance behind. Public service broadcasters (KBS, MBC) were criticised for having their news agenda influenced by Park's administration and are under pressure to reform their governance structures to restore public trust.

In the run-up to the presidential election, concerns about fake and partisan news escalated, as did initiatives to limit its impact on voters. Seoul National University launched a fact-check system called SNU Fact-Check in partnership with Naver and 15 other news organisations. Journalists checked the accuracy of campaign messages and investigated suspicious claims reported by audiences. The results were released both on Naver and through news websites. During the election period, journalists also experimented with new formats such as data journalism, election-related quizzes, and live social video.

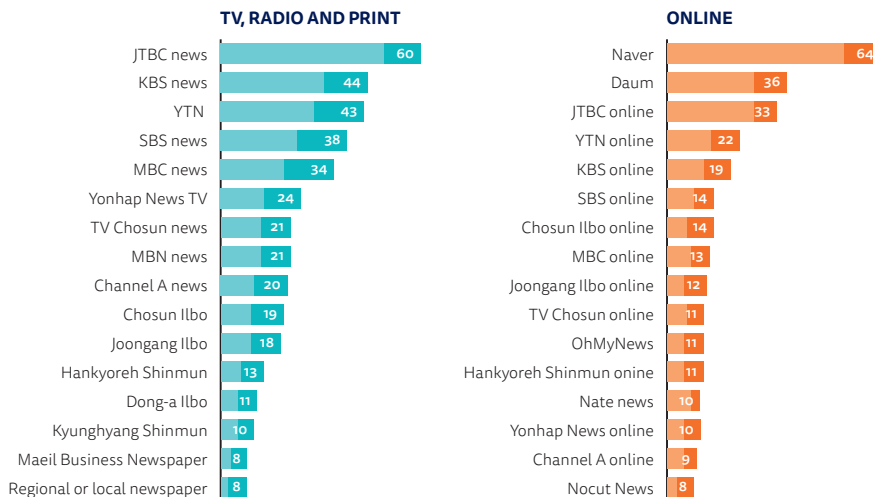
Sonho Kim

Senior Researcher, Korea Press Foundation

TOP BRANDS

% Weekly usage

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



PAY FOR ONLINE NEWS

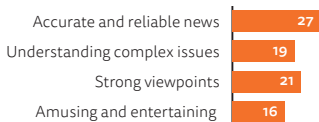


12%

(=16th/35)

BRAND ATTRIBUTES

% of KBS users who say it is best for...



% of JTBS users who say it is best for...



USE AN AD-BLOCKER

12% (-)

(36th/36)

% of Naver users who say it is best for...



% of DAUM users who say it is best for...



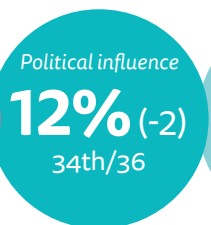
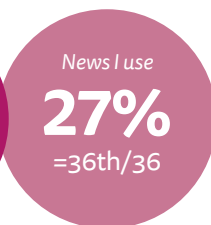
TRUST

Overall trust in the news remains lowest among the countries surveyed, even if some (JTBC) have had their reputations enhanced by their pursuit of political corruption. The small difference between overall trust and trust in the news I use, relates to the heavy use of portals, where people often don't remember specific news brands.

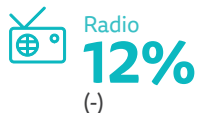
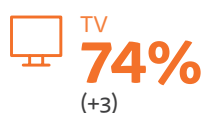
MOST OF THE TIME I TRUST...



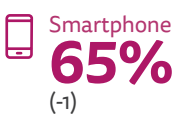
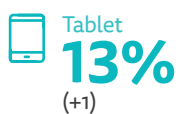
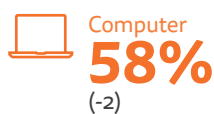
THE MEDIA IS FREE FROM...



SOURCES OF NEWS



DEVICES USED FOR NEWS



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Kakao Talk*	39%	84%
2	Facebook	28% (+4)	51%
3	YouTube	28% (+12)	57%
4	Kakao Story*	17%	46%
5	Band	9% (+2)	27%

*These figures were based on a resurvey of 1,003 respondents done in April 2017.

TAIWAN



The Taiwanese media market is characterised by some of the highest penetration of pay TV in the world. The democratic role of the media is threatened by a weakly regulated commercial sector and the fear of Chinese influence.

Taiwan's media system has changed considerably since two newspaper groups and three terrestrial television stations enjoyed oligopoly status in the days of authoritarian rule. In the 1990s, the Taiwanese government adopted a deregulation media policy, which led to multi-channel TV becoming the dominant platform, reaching 85% of households. The newspaper industry, on the other hand, has suffered a steep decline, losing more than half of its readership from 76% in 1992 to just 30% in 2015.⁸¹

Over the last decade Taiwan's traditional news media have been forced to migrate to online platforms, not least because the online advertising market has been growing at around 20% per year.⁸² A key challenge, however, has been the popularity of online portals and aggregators. Yahoo! News is the most used online news brand. It curates news from multiple sources and combines this with a range of popular services such as email, auction sites, and community-driven question-and-answer (Q&A) forums.

Apple Daily online is the second most used online news brand in Taiwan. It was founded by controversial businessman Jimmy Lai in

Hong Kong, where it established a reputation for celebrity coverage, and sensationalist news as well as a pro-democracy stance. The Taiwanese version has its own identity and adjusts itself to the local market.

A key issue is the alleged influence over politics from mainland China via Taiwanese tycoons who have commercial interests there. As one example, the Want Want group bought the China Times media group in 2009, after which it adopted a pro-China editorial line. The Want Want group also proposed to buy the largest cable system operator, triggering a student-led Anti-Media Monopoly Movement in 2012. But while legislation stalled, other tycoons have continued to invest in Taiwan, with Foxconn Technology Group buying another cable system in February 2017. The 'China factor' along with the influence of powerful business leaders casts a long shadow over the Taiwanese news media and their ability to report freely.

Concerns over the independence of commercial media led media scholars and professionals to advocate for a public television system in the 1990s. Taiwan public television (PTS) was established in 1998, and developed into a wider public media consortium after the addition of a terrestrial channel and Hakka TV (a minority-language channel) in 2006. PTS continues to suffer from lack of money, limited viewership, and is subject to some political interference, but PTS news stories are generally trusted by media professionals.⁸³ The PTS online news website Peopo, not only cultivates citizen journalists but also accounts for around one-third of PTS's total online visitors.

STATISTICS

Population	23m
Internet penetration	88%

New models for independent media are emerging through digital-born news websites, such as Storm Media and New Talk, established by well-regarded journalists. Most online news media in Taiwan are ad-supported. Some have introduced paywalls for premium content such as in-depth reports or information graphics. Still others maintain their financial stability through seeking reader donations or using crowdfunding, looking to non-profit status as way of creating sustainable journalistic operations. Even so only a minority (15%) of Taiwanese are prepared to pay for online news.

More than half (57%) of Taiwanese citizens use social media for news each week, mainly Facebook, Line, and YouTube. Like many other Asian countries, Taiwan also has a tradition of online bulletin boards (BBS). The most widely used service, PPT, is a non-commercial open source BBS which was founded by students from the National Taiwan University in 1995, and has since attracted 1.5 million registered users. The BBS has over 20,000 boards covering a multitude of topics engaging young people in particular.

In a move that will be studied carefully elsewhere, the government has recently passed a law that would impose additional taxes on foreign (non-Taiwanese) online commercial operators including social media. Some media scholars have suggested that any money raised from these taxes should be spent on supporting independent high-quality journalism.

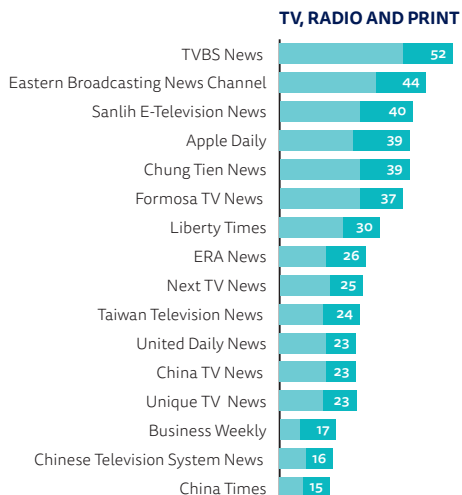
Lihyun Lin
National Taiwan University

⁸¹ Calculated from *Media Book 2016*, published by Media Agency Taiwan, retrieved from www.maataipei.org/upload/1472117411.docx. Readership data from: Advertising Revenues of Newspapers. *Brain Monthly* 349: 66–75. ⁸² Calculated from *Media Book 2016*, published by Media Agency Taiwan, retrieved from www.maataipei.org/upload/1472117411.docx
⁸³ *Media credibility Report 2015*, Media Watch Taiwan, retrieved from, <http://mediawatch.org.tw/sites/default/files/20150210%E5%AA%92%E9%AB%94%E5%8F%AF%E4%BF%A1%E5%BA%A6%E7%A0%94%E7%A9%B6%E5%A0%B1%E5%91%8A%E5%AF%A6%E5%8B%99%E7%89%88new.pdf>

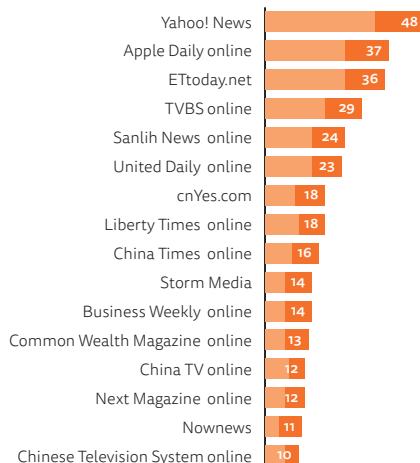
TOP BRANDS

% Weekly usage

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



ONLINE



PAY FOR ONLINE NEWS

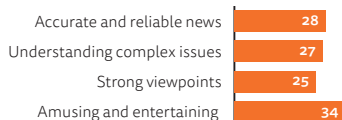


15%

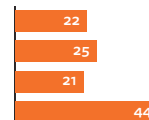
(=10th/35)

BRAND ATTRIBUTES

% of Yahoo! News users who say it is best for...



% of Apple Daily users who say it is best for...

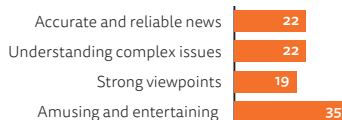


USE AN AD-BLOCKER

20%

(=30th/36)

% of ETtoday users who say it is best for...



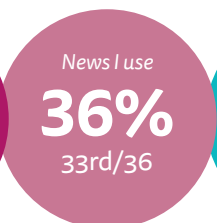
% of TVBS users who say it is best for...



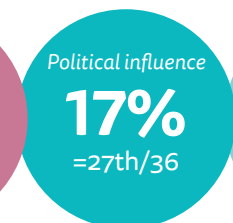
TRUST

Reflecting previous authoritarian rule, vicious competition in the media market, and the interventions of owners, Taiwanese people have low trust in the news they read. Recently some lawmakers proposed imposing a law against fake news, but NGO groups protested because of the fear of restricting freedom of speech.

MOST OF THE TIME I TRUST...



THE MEDIA IS FREE FROM...



SOURCES OF NEWS

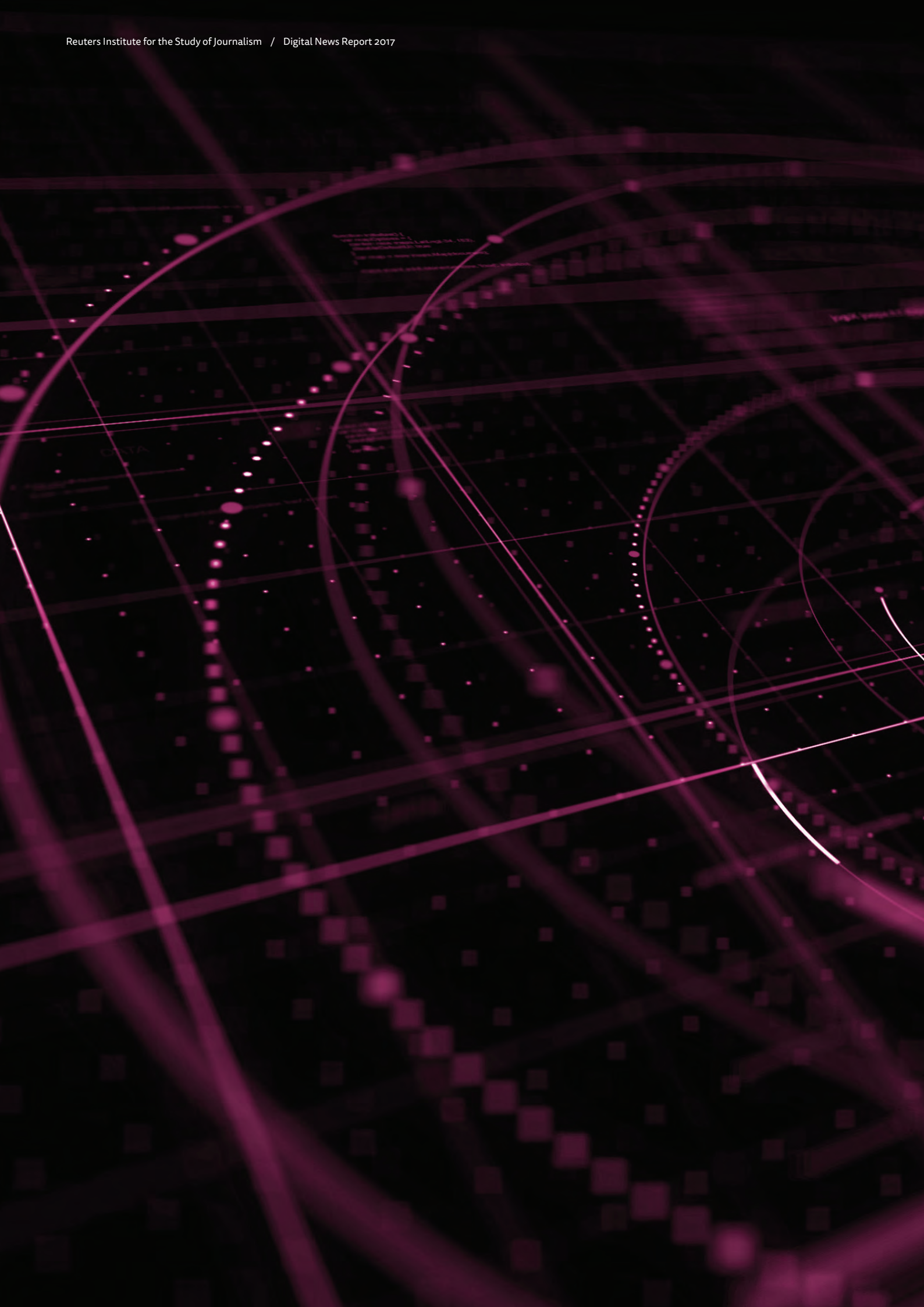


DEVICES USED FOR NEWS

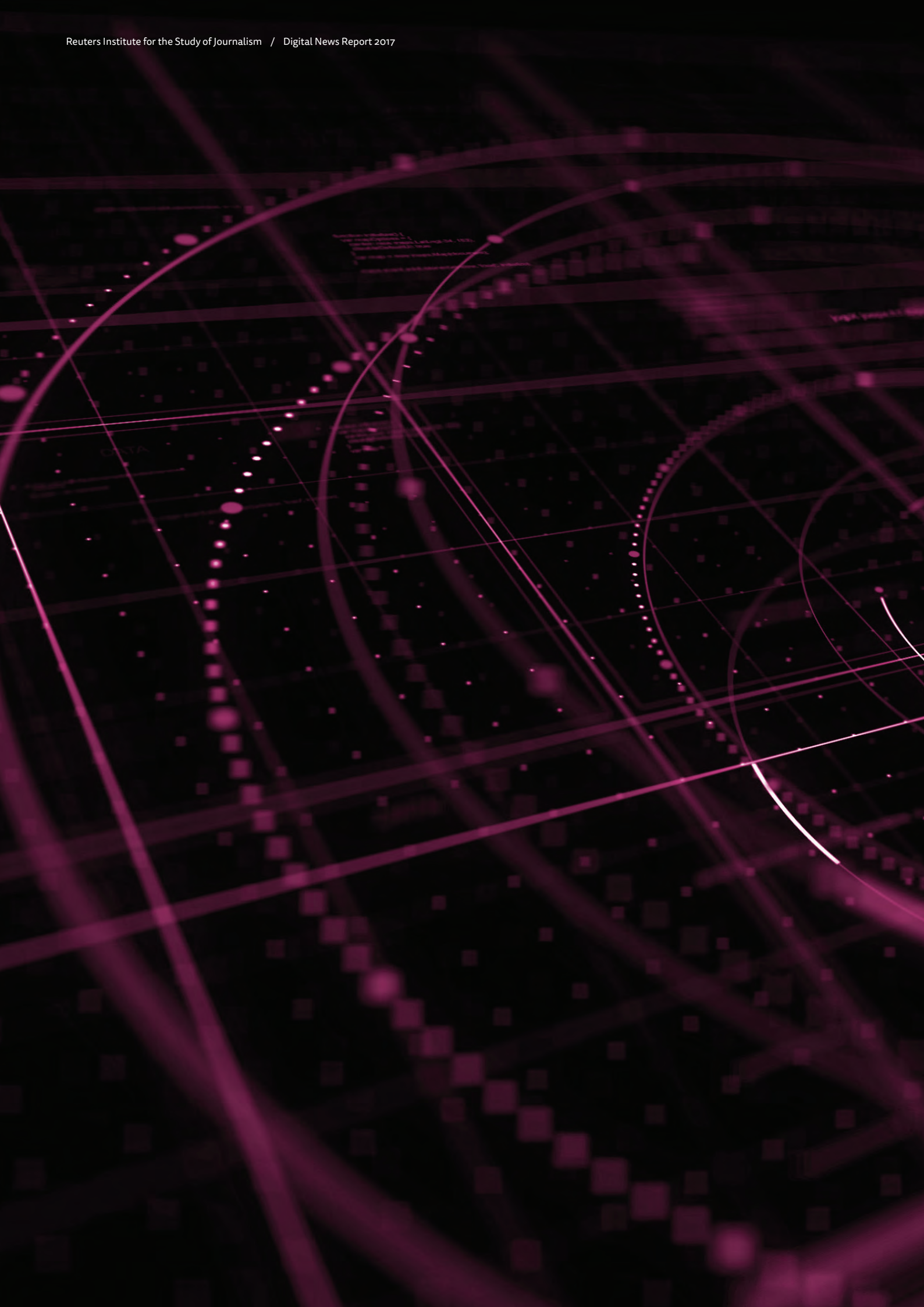


TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	55%	76%
2	Line	45%	76%
3	YouTube	36%	69%
4	PTT (bulletin board)	11%	20%
5	Facebook Messenger	6%	32%



Postscript and further reading



Postscript and further reading

The authors welcome feedback on this report and suggestions on how to improve our work via reuters.institute@politics.ox.ac.uk as well as potential partnerships and support for our ongoing work.

OTHER RELEVANT ARTICLES AND SURVEYS

Emily Bell, Facebook is Eating the World. *Colombia Journalism Review* (Mar. 2016) https://www.cjr.org/analysis/facebook_and_media.php

Melissa Bell, *Nine Ways Media Broke the News and How to Fix it*. <http://reutersinstitute.politics.ox.ac.uk/news/nine-ways-media-broke-news-%E2%80%93-and-how-fix-it>

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Zillah Watson, *VR for News: The New Reality?* (Apr. 2017)

Annika Sehl, Alessio Cornia, and Rasmus Kleis Nielsen, *Developing Digital News in Public Service Media* (Mar. 2017)

Kevin Anderson, *Beyond the Article: Frontiers of Editorial and Commercial Innovation* (Feb. 2017)

Nic Newman, *Media Journalism and Technology Predictions* (Jan. 2017)

Tom Nicholls, Nabeelah Shabbir, and Rasmus Kleis Nielsen, *Digital-Born News Media in Europe* (Dec. 2016)

Nic Newman, *News Alerts and the Battle for Lockscreen* (Nov. 2016)

Lucas Graves, and Federica Cherubini, *The Rise of Fact-Checking Sites in Europe* (Nov. 2016)

Jason Vir, and Andrew Dodds (Kantar Media), *Brand and Trust in a Fragmented News Environment* (Oct. 2016)

Antonis Kalogeropoulos, Federica Cherubini, and Nic Newman, *The Future of Online Video* (June 2016)

Federica Cherubini and Rasmus Kleis Nielsen, *Editorial Analytics: How News Media are Developing and Using Audience Data and Metrics* (Feb. 2016)

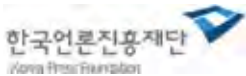


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