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Newspaper subscription models are slowly increasing, but most news outlets still offer completely free access to news

- 69% of major newspapers across seven large media markets operate a paywall of some kind, up slightly since 2017; the largest increase has been in the US, from 60% to 76%
- Fears about paywalls limiting access to quality information are not borne out so far, though, with hard paywalls very rare (3%) amongst the 212 news organisations studied
- Monthly subscription prices average €14.09 (£12.21), roughly similar to 2017, and range from as little as €2 (£1.74) to €41.50 (£36) a month.
- All broadcasters studied offer free access to digital news
- Almost all (94%) digital-born news outlets offer free access

More than two-thirds of leading newspapers (69%) across the EU and US are operating some kind of paywall, a trend that has increased since 2017, especially in the US where this has increased from 60% to 76%. However, fears about paywalls limiting access to online news are ‘overblown’, according to a study of over 200 news outlets across seven countries, with hard paywalls that completely restrict access to non-fee payers being very rare. With almost all television organisations and digital-born media offering free access to online news, a majority (53%) of all news outlets studied are available at no cost.

These are some of the key findings from new research by the Reuters Institute for the Study of Journalism, [Pay Models for Online News in the US and Europe: 2019 Update](#), by Felix Simon and Lucas Graves. The study examines 212 news outlets – newspapers, weekly newspapers or magazines, broadcasters and digital-born news outlets – across seven countries in Europe and the US.

Lead author of the report Felix Simon said: “We see that a growing number of news organisations across Europe and in the US are trying to find new, sustainable business models in order to make up for the revenue shortfall caused by a rapidly changing business environment. In this context, paywalls are increasingly popular with publishers, who are challenging the assumption that people will not pay for digital news.

At the same time, recent research shows that the number of people willing to pay for news is slowly growing. The challenge for news organisations now is to deliver such quality content, and the kind of user experience and convenience that people have come to expect from digital media, and to market their offers to the many who are currently not paying for journalism, but might do so in the future.”

The fact sheet also finds that of those news organisations which operate some type of paywall, monthly fees range from as little as €2 (£1.74) to €41.50 (£36), averaging €14.09 (£12.21). Payment trends vary a great deal between countries and publication type. Business newspapers charge the most, with the UK’s Financial Times topping the list. The UK overall charges the highest average fees for newspapers and weeklies (€17.45/£15.12 per month), but has the lowest proportion of titles requiring such payments. At the opposite end, Poland’s average monthly asking price is €9.27 (£8.04).

The study also finds that while almost all (94%) digital-born news outlets, for now, offer free access, with just two publications running a paywall, and that all broadcasters continue to offer free access to digital content, some corners of the media are rapidly adopting payment models with just 27% of regional newspapers offering free access compared to 36% just two years ago.

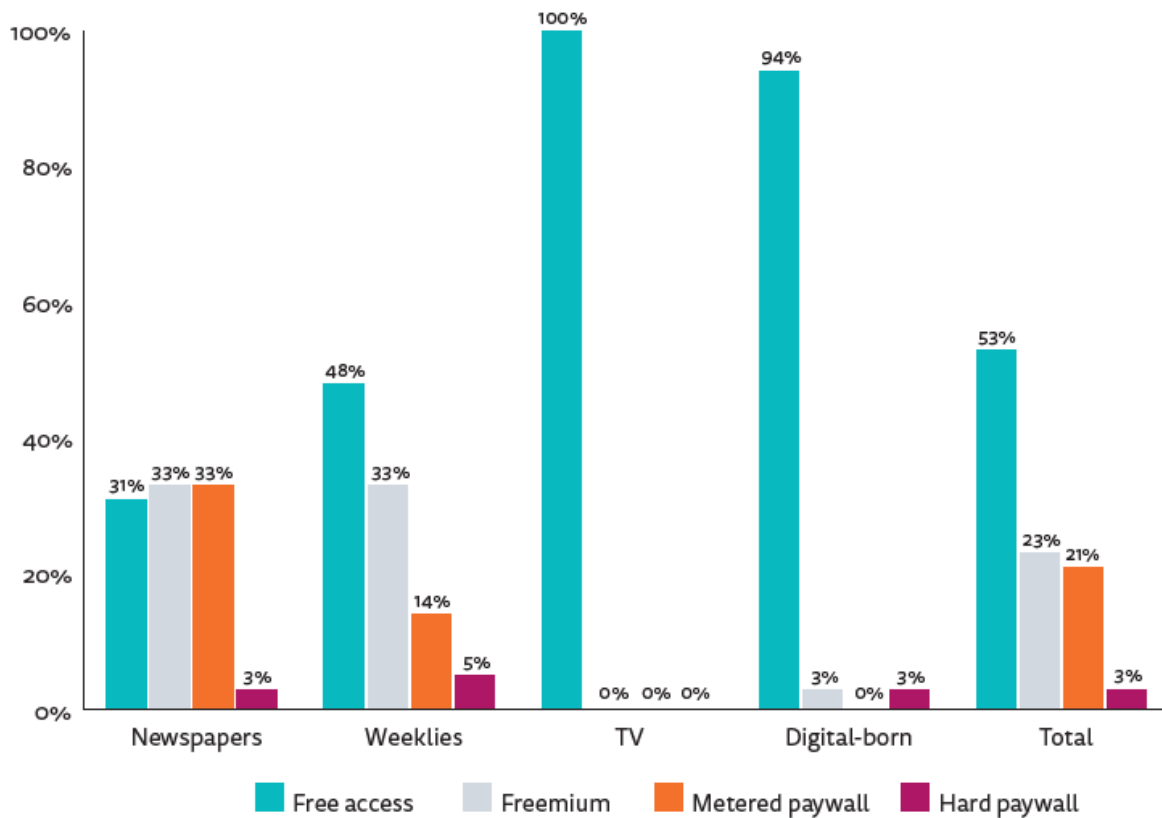
Selected figures

Average prices for pay models (all outlets, all countries)

2019	Free access	Freemium (€)	Metered paywall (€)	Hard paywall (€)	Average monthly price (€)	Netflix basic subscription price (€)	N
Finland	n/a	13.89	18.77	n/a	16.14	7.99	22
France	n/a	14.49	16.25	11.00	14.91	7.99	30
Germany	n/a	13.46	19.75	n/a	14.51	7.99	31
Italy	n/a	11.66	18.62	n/a	14.45	7.99	30
Poland	n/a	9.41	12.42	8.48	9.27	7.49	29
UK	n/a	8.10	11.47	35.83	17.45	6.90	28
US	n/a	n/a	10.95	34.70	11.93	8.04	42
Total	n/a	11.84	15.46	22.50	14.09	7.77	212

Note: In the case of a combination of a metered model and premium content, we coded the offer as ‘metered paywall’. Exchange rate and Netflix prices at 23 April 2019.

Pay models across media types (all countries)



Methodology

The study analysed 212 news organisations. The 170 European outlets were first sampled in 2017 in a previous Reuters Institute study. That study selected 15 national and regional newspapers, up to 3 weekly newspapers or magazines, up to 5 broadcasters, and 5 digital-born news websites in each European country according to reach and/or circulation. US newspapers selected for this fact sheet were based on a Columbia Journalism Review report from 2017 into titles with circulations of over 100,000. From this list, 25 were chosen, along with 6 digital-born outlets, 6 broadcasters and 4 weekly newspapers or magazines. Each site was visited between March and April 2019 to assess the presence and type of paywall. Currency exchange rates are from April 2019 and September 2017.

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About the Reuters Institute for the Study of Journalism

The Thomson Reuters Foundation is the core funder of the RISJ, based in the Department of Politics and International Relations at the University of Oxford. The RISJ was launched in November 2006 and developed from the Reuters Fellowship Programme, established at Oxford 35 years ago. An international research centre in the comparative study of journalism, the RISJ aims to be global in its perspective and provides a leading forum for scholars from a wide range of disciplines to engage with journalists from around the world. See <http://reutersinstitute.politics.ox.ac.uk/>

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