

Pay Models for Online News in the US and Europe: 2019 Update

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Introduction

As legacy news revenues continue to decline, and with the lion's share of digital advertising revenues claimed by large technology companies, pay models have become an increasingly important part of the business of digital news. Digital advertising remains a key source of income; as Newman's (2019) survey of news executives finds, 81% of respondents say that it is still the most important revenue focus, followed by subscriptions (78%), native advertising (75%) and various other sources of revenue. Nevertheless, subscriptions are a key priority for the news industry going forward, with over half (52%) of the executives expecting this to be the main revenue focus in 2019.

In April 2017, RISJ analysed the adoption of three dominant forms of pay models – freemium, metered paywalls, and hard paywalls – across leading news organisations in six European markets: Finland, France, Germany, Italy, Poland, and the United Kingdom (Cornia et al. 2017). This factsheet offers an update to our original analysis based on the same sample of news organisations, in order to understand how the landscape has developed over the last two years. We also expand the original sample to include data from the United States for 2017 and 2019, given its importance as both an early testing ground for pay models in news and as a major media market.

Overall Findings and Differences by Sector

The analysis presented here is based on examining the online offerings of more than 200 leading news organisations across the seven markets. (See detailed methodology and sample at the end of this factsheet.) As in 2017, we collected data from four broad categories of outlets: daily newspapers (up-market, tabloid/mid-market, business, and regional), weekly newspapers and news magazines, TV news (commercial and public service media), and digital-born news outlets. We sorted pay models into three categories: hard paywalls, where no content is accessible for free at all; 'freemium' models made up of a mix of free and premium content; and metered paywalls, which allow access to a limited number of free articles each month.¹

Based on an examination of 212 of the most important news organisations in these seven countries, we find that:

- 69% of the newspapers in our sample operate some kind of a pay model today, a small increase from 64.5% in 2017. Hard paywalls are extremely rare, with the landscape evenly divided between freemium models and metered paywalls (33% each).
- Just over half of weekly newspapers and news magazines (52%) operate a pay model, down 10

¹ There are, of course, various hybrid models in between. In the case of a combination of a metered model and premium content, we coded the offer as 'metered paywall'.

percentage points from 2017. Freemium models are the most widely used, followed by metered paywalls and hard paywalls.

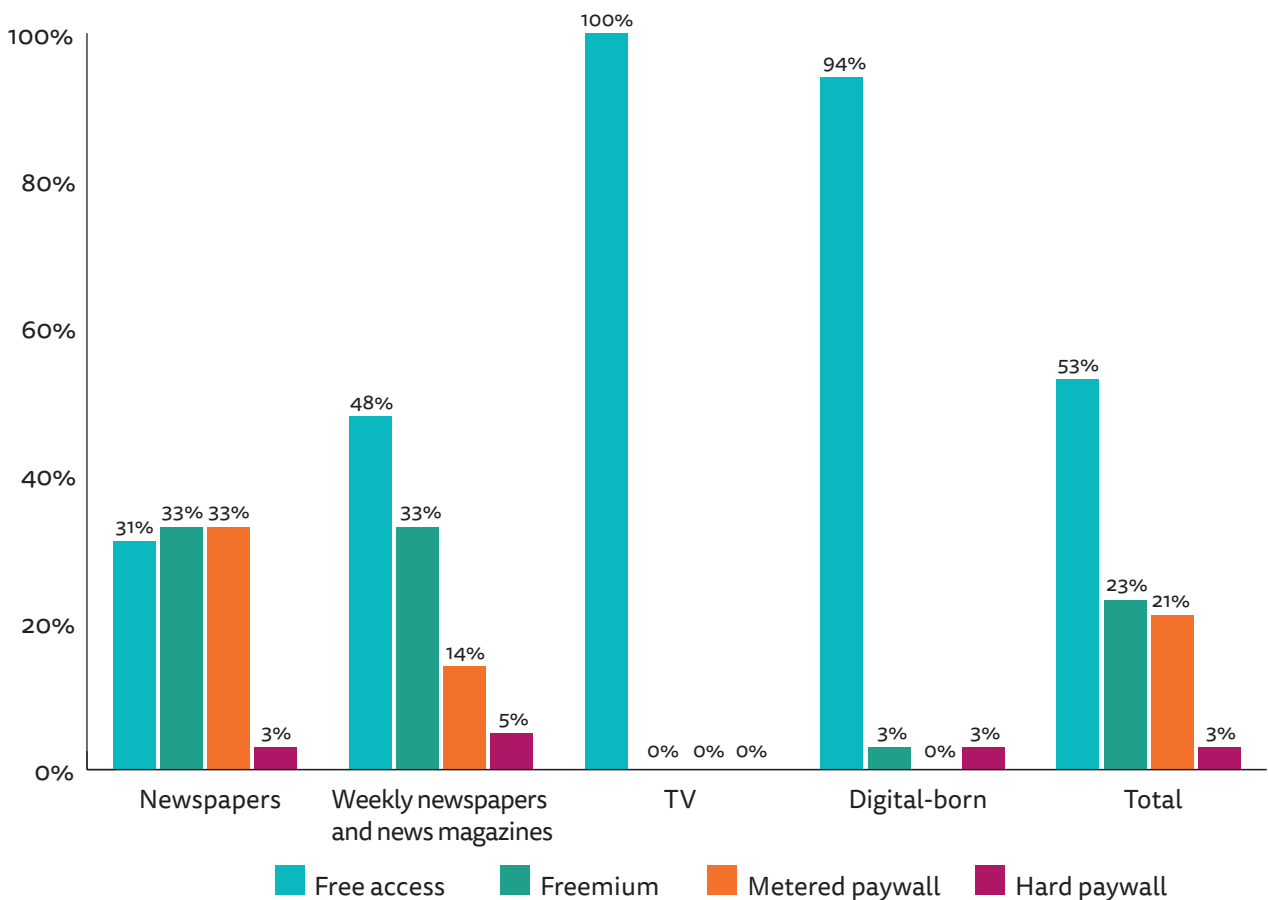
€41.50 (£36) a month. For comparison, the average price for a Netflix subscription across countries is €7.77 (£6.73). (See Table 1.)

- Just as in 2017, all broadcasters continue to offer free access to their digital news in 2019. This includes private sector broadcasters as well as public service media like the BBC in the UK or Yle in Finland.
- Almost all digital-born news outlets (94%) across the seven countries offer free access to their news. Mediapart in France and the *Independent* in the UK² are the only digital-born/digital-only organisations in our sample that operate a paywall, up one from 2017.
- Looking only at those news organisations that operate a pay model, the average price for the cheapest available monthly subscription (without discounts) in 2019 is €14.09 (£12.21), roughly similar to 2017. Prices range from as little as €2 (£1.74) to

We thus find that the trend identified two years ago persists in 2019, with newspapers across Europe and the US gradually moving away from digital news offered for free and supported primarily by display advertising. Some corners of the industry have moved even quicker: among regional newspapers in our sample, just over a quarter (27%) now offer free access to readers, down sharply from 36% in 2017. This shift is in line with other research (Cornia et al. 2016) showing that many newspapers and news magazines are cultivating a wider range of revenue sources – not just various pay models but also native advertising, e-commerce, events, etc.

This shift is not mirrored across the rest of the industry, however. Overall, more than half of the news organisations in our sample – 53% of the 212 outlets across seven countries – continue to offer free access

Figure 1. Pay models across media types (all countries)



² We consider the *Independent* a digital-only outlet, given that it first appeared in print and only later turned into an online-only outlet.

to digital news. This includes digital-born news media (94%), most tabloid newspapers (73%), and all private sector broadcasters and public service media we examined. (See Figure 1 and Tables 2–4 for details.) The continued dominance of free access among digital-born outlets is especially noteworthy given the industry attention to a few organisations that are building their business around paying members/subscribers, such as France’s Mediapart or (beyond our sample) De Correspondent in the Netherlands and the US and Republik.ch in Switzerland (Nicholls et al. 2016).

Country Differences

The six European countries we cover represent a wide range of media systems, including countries with a history of strong private sector and public service media as well as countries with historically weaker private sector media and less well-funded and widely used public service media. The European markets also differ in terms of overall market size, levels of advertising expenditure, and the degree of direct competition they face from international content. Meanwhile, the United States is by far the largest media market in the sample, marked by a strong, highly competitive private sector and relatively weak public service media.

Comparing results across Finland, France, Germany, Italy, Poland, the United Kingdom, and the US, we find interesting differences (see Figure 2 and Tables 4 and 5 for details):

- A majority of top newspapers and news weeklies in Finland, France, Germany, Poland, and the United States have adopted pay models.
- By contrast, in both Italy and the United Kingdom, most major newspapers and weeklies continue to offer free access to their digital news. These are very competitive markets where even leading titles may fear losing market share if they implement pay models.
- Monthly prices vary dramatically across titles and countries (see Figure 2). Looking specifically at newspapers and weeklies, Poland has the lowest average monthly price at €9.27 (£8.04). The UK has the lowest percentage of newspapers and

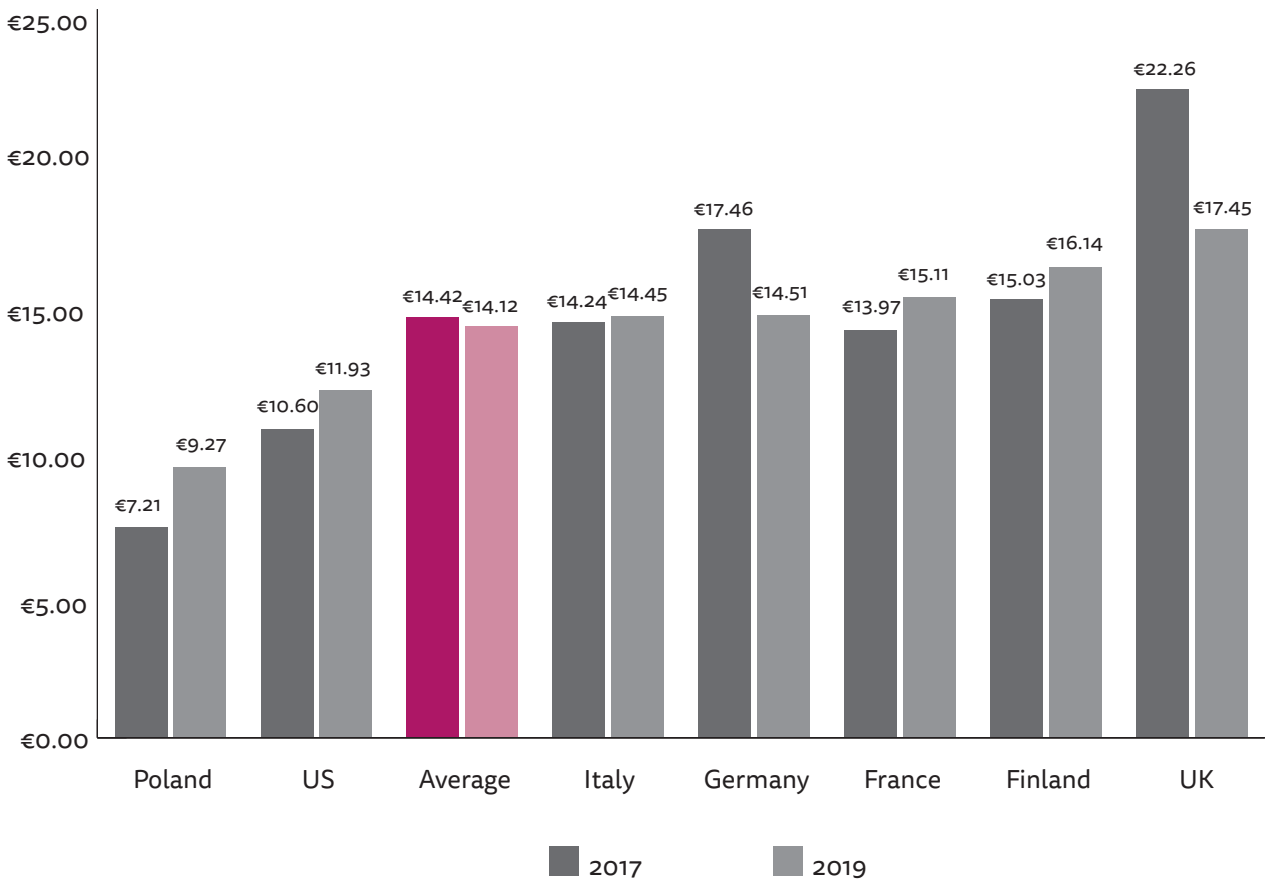
weeklies with pay models (33%) but the highest average monthly price at €17.45 (£15.12), peaking at €41.50 (£36) for the *Financial Times*.

- Prices vary by model. Metered models average at €15.46 (£13.40) across all countries and range from €10.95 in the US to €19.75 in Germany. Freemium models are on average cheaper at €11.84 (£10.26), running from €8.10 (£7.02) in the UK to €14.49 (£12.56) in France. The prices for content on websites with hard paywalls vary the most, with average prices between €8.48 (£7.35) per month in Poland and €35.83 (£31.06) in the UK (see Table 1).
- Prices also vary by market orientation, with clear differences among business, up-market, regional, and tabloid papers. Business newspapers are unsurprisingly the most expensive, with an average monthly price of €28.32 (£24.55) across the seven countries. They are also the only category which consistently has had pay models in place in both 2017 and 2019.
- Finally, the United States has seen a sharper rise in paywalls than the EU. Some 48% of US outlets in our sample have a paywall, compared to 38% in 2017, a 10 percentage point increase in just two years. This increase stems exclusively from newspapers, of which 76% have a pay model in place in 2019, up 16 percentage points from 2017. During the same period, the number of paywalls across the sample of media from EU countries covered here has stayed nearly flat, rising just one percentage point to 46% in 2019.

As in the original report, we found that the content and services offered vary as much as the pay models and prices themselves.³ For instance, many Finnish newspapers use a hybrid paywall model (a combination of a monthly page view limit and some premium content). The US is dominated by metered paywall solutions (see also Steffens 2018). While freemium models abound in Poland and are present across Europe, we did not find one instance in our sample in the US. Some news organisations include in their minimum price offer only access to their news on the websites, whereas others opt to charge more and also offer other services (e.g. the digital version of the printed newspaper, mobile apps for subscribers, archive access, newsletters). It also has to be noted that news organisations that offer free access might, in

³ For example, some subscription packages also offered access to a digital version of the printed newspaper or customised smartphone apps for subscribers.

Figure 2. Average monthly price across countries (newspapers plus weekly newspapers and news magazines with pay model only)



a few cases, ask for other forms of compensation. For instance, both the UK's the *Guardian* and Germany's *die tageszeitung (taz)* offer readers the option to donate and to become voluntary supporters.

Summary

In many ways, 2018 has been a difficult year for legacy media companies, especially newspapers; print revenue has continued to decline with digital unable to make up the difference. In this climate, we are seeing a strategic split: as many publishers (particularly in complex and fragmented markets) continue to offer online news for free, much of the industry is making a renewed push to implement pay models as well as membership and donation models (Newman et al. 2018). As Newman's (2019) survey of news executives finds, subscription and membership is the key priority for the news industry going forward. Over half (52%) expect this to be the main revenue focus in 2019, compared with just 27% for display advertising, 8% for native advertising and 7% for donations.

Recent surveys give reason to be cautiously optimistic about this approach. As the *Digital News Report 2018* notes, the number of people paying for news is slowly growing and, across countries, the future likelihood to pay has increased amongst those who are not already paying (Newman et al. 2018). Yet this growth is, in most cases, still incremental and reader revenues, though growing as well, rarely make up for declining legacy revenues and an increasingly difficult digital advertising market. This outlook has not significantly changed since our last factsheet in 2017.

Overall, we can draw the following conclusions from these findings:

- Paywalls are likely here to stay. The trend identified two years ago persists in 2019, with newspapers and news magazines across Europe and the US moving away from digital news offered for free. However, growth in the US has significantly outpaced growth in the EU.
- Nevertheless, fears about paywalls limiting the access to quality information – with all the

concomitant implications for democracy – seem overblown for now. Hard paywalls are extremely rare, even among newspapers, and a majority of outlets overall (53%) remain free to access for users.

- Pay models are not evenly distributed across countries but tied to the individual circumstances of each market. Overall, freemium and metered approaches are dominant, with hard paywalls only used by a small minority. In the US, however, freemium models do not exist.
- Most digital-born outlets (94%) continue to provide free access to users. Given recent disruptions in this space, however, it remains an open question how long this trend will continue and whether we will see a shift to pay models over the next several years.

- Among newspapers, regional outlets have embraced paywalls more eagerly than their up-market counterparts.

As this overview demonstrates, a growing number of news organisations across Europe and in the US are challenging the assumption that people will not pay for digital news. And, encouragingly, research suggests that some people across all age groups, including younger media users, are willing to pay for quality content and services online that they find valuable and useful (Fletcher and Nielsen 2016, Newman 2018). The challenge for news organisations now is to deliver such quality content and services, to develop products that provide 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.

Tables

Table 1. 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 rates and Netflix prices at 23 April 2019.

Table 2. Free access by outlet type

	2017 (N)	2017 (%)	2019 (N)	2019 (%)	Total (N)
Up-market newspaper	10	35.71	10	35.71	28
Tabloid/mid-market newspaper	7	63.64	8	72.73	11
Business newspaper	0	0	0	0	9
Regional newspaper	27	36.49	20	27.03	74
Weekly newspapers and news magazines	8	38.10	10	47.62	21
TV	31	100	31	100	31
Digital-born	38	97.43	35	94.59	37*

Note: * 39 outlets in 2017. In the case of a combination of a metered model and premium content, we coded the offer as 'metered paywall'. Differences to 100% for the media types are due to rounding.

Table 3. Distribution of pay models (all outlets, all countries)

2019	N	%
Total	212	100
Free access	113	53.30
Freemium	49	23.11
Metered paywall	44	20.75
Hard paywall	6	2.83
Has a pay model	99	46.70
Has no pay model	113	53.30

Note: In the case of a combination of a metered model and premium content, we coded the offer as 'metered paywall'. Differences to 100% for the media types are due to rounding.

Table 4. Pay models across media types (all countries)

2019	Free access (%)	Freemium (%)	Metered paywall (%)	Hard paywall (%)
Newspapers	30.65	33.06	33.06	3.23
Weekly newspapers and news magazines	47.62	33.33	14.29	4.76
TV	100	0	0	0
Digital-born	94.44	2.78	0	2.78
Total	53.30	23.11	20.75	2.83

Note: In the case of a combination of a metered model and premium content, we coded the offer as 'metered paywall'. Differences to 100% for the media types are due to rounding.

Table 5. Pay models across countries (newspapers and weeklies only)

2019	Free access (%)	Freemium (%)	Metered paywall (%)	Hard paywall (%)	Average monthly price (€)	Netflix basic subscription price (€)	N
Finland	13.40	46.70	40.00	0	16.14	7.99	15
France	4.76	61.90	33.40	0	15.11	7.99	21
Germany	42.86	47.62	9.52	0	14.51	7.99	21
Italy	50.00	30.00	20.00	0	14.45	7.99	20
Poland	23.80	52.38	14.28	9.52	9.27	7.49	21
UK	66.67	5.56	16.70	11.20	17.45	6.90	18
US	32.03	0	65.51	3.45	11.93	8.04	29
Total	33.10	33.10	30.34	3.45	14.12	7.77	145
2017	Free access (%)	Freemium (%)	Metered paywall (%)	Hard paywall (%)	Average monthly price (€)	Netflix basic subscription price (€)	N
Finland	13.40	46.70	40.00	0	15.03	n/a	15
France	4.76	66.70	28.60	0	13.97	n/a	21
Germany	47.62	38.09	14.28	0	17.64	n/a	21
Italy	60.00	30.00	10.00	0	14.24	n/a	20
Poland	9.52	71.43	9.52	9.52	7.21	n/a	21
UK	66.70	5.60	16.70	11.10	22.26	n/a	18
US	44.80	0	48.28	3.45	10.60	n/a	29
Total	35.86	35.12	25.51	3.45	14.42	n/a	145

Note: In the case of a combination of a metered model and premium content, we coded the offer as 'metered paywall'. Total may differ from 100% due to rounding. Exchange rates at 23 April 2019 and 22 September 2017 respectively.

Methodology and Sample

In total, we analysed 212 news organisations for this study, 170 in Europe and 42 in the United States. The 170 European news organisations included were first sampled in 2017 (Cornia et al. 2017) and kept for comparison in 2019.⁴ For each European country, our 2017 study selected:

- 15 national and regional newspapers with the highest print circulation according to national official sources⁵;
- Up to three weekly newspapers or news magazines per country based on their print circulation or reach according to national sources or the *Digital News Report 2016* (Newman et al. 2016)⁶;
- Up to five broadcasters – public service and commercial – based on their reach for TV news according to national official sources or the *Digital News Report 2016* (ibid.)⁷;
- The five digital born news websites (domestic and/or international) in a broad sense with the highest reach in each of the countries based on Comscore data for reach within the countries in January 2017.

Because national media markets differ significantly from country to country, the sample is not entirely symmetrical. To avoid leaving out individually important sites not captured by the overall sampling, we strategically added up to four additional news organisations in each country – ranging from digital-born news media like Mediapart in France to national newspapers like *Die Welt* or *die tageszeitung (taz)* in Germany – that we knew in advance are important parts of the overall media landscape and represent important examples of digital journalism, even if they would not have been selected according to reach alone.

For the 42 outlets in the United States, we relied on a study conducted by the *Columbia Journalism Review* in September 2017 (Stulberg 2017). The *CJR*'s original sample is based on a list of all daily newspapers in the US with a circulation over 100,000. Using matching Comscore data, the original authors ranked the traffic of those paper's websites and limited the final sample to the 25 outlets with the most-visited websites. To bring the *CJR*'s sample in line with our methodology,⁸ we further added:

- six digital born outlets with the highest reach based on Comscore data for reach (multi-platform) in September 2017;
- six broadcasters – public service and commercial – based on their reach for TV news according to the *Digital News Report 2018* (Newman et al. 2018);
- four weekly newspapers or news magazines based on the *Digital News Report 2018* (ibid.).

Our sample thus includes a total of 212 of the most important news organisations across the seven countries covered, but leaves out a number of smaller news organisations, including many local and regional ones. In each country, we have coded between 22 and 42 of the most important news organisations. To code the websites, we visited each site. If a site had a paywall, we noted the type of the paywall and the monthly cost of a digital-only subscription without discounts. For each site, we determined through testing if the site had a metered paywall. The data was collected between 25 March and 22 April 2019, with a second round of random sample testing on 29 April 2019. It thus represents a snapshot of rapidly evolving markets. Exchange rates for currency conversation are from 23 April 2019 and 22 September 2017, respectively. Please see the Appendix for the full list of organisations included in our sample and more detail on each title.

⁴ The 2017 sample originally included 172 news outlets. However, both BuzzFeed and Mashable have folded in France and no longer existed at the time of coding in 2019. Other than that, the sample has remained the same. HuffPost Deutschland was still available at the time of coding but has since ceased to operate on 31 March 2019.

⁵ FIN: Media Audit Finland 2014; FR: Alliance pour les chiffres de la presse et des medias 2016; GER: IVW Q4/2016 (plus overview of largest regional newspapers/publishing groups on Meedia (2017)); IT: Accertamenti Diffusione Stampa, December 2016; POL: ZKDP/ABC Poland 2015; UK: ABC, January 2017. In a few cases in Germany, where publishing houses did not publish the circulation of individual newspapers, but only the aggregated circulation of several newspapers of the group, we selected the publishing group according to the circulation and only then one of their newspapers.

⁶ FR, GER, IT, POL: Newman et al. 2016; UK: ABC, second half of 2016. In Finland, due to the limited significance of weeklies, they were not included in the sample.

⁷ FIN, FR, POL, UK: Newman et al. 2016; GER: AGF in collaboration with GfK, TV Scope, Fernsehpanel (D+EU), In Zubayr & Gerhard (2016, p. 148); Italy: AGCOM 2016.

⁸ To identify pay models and prices for the added outlets not included in the *CJR*'s original 2017 study, the authors relied on extensive desk research on industry websites, amongst others Nieman Lab, Poynter, Digiday, and the *CJR*, as well as the Internet Archive.

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Appendix

ORGANISATIONS INCLUDED IN THE STUDY

See the main document for the sample strategy behind the sites selected. In cases where subscriptions are sold on a weekly basis, monthly prices are for four weeks.

FINLAND	Type of media	Pay model 2017	Pay model 2019	Monthly price 2017 (€)	Monthly price 2019 (€)
Helsingin Sanomat	Up-market newspaper	Metered paywall	Metered paywall	16.50	17.90
Maaseudun Tulevaisuus	Up-market newspaper	Free access	Freemium	n/a	13.90
Ilta-Sanomat	Mid-market/tabloid newspaper	Freemium	Free access	9.90	n/a
Iltalehti	Mid-market/tabloid newspaper	Freemium	Freemium	8.90	8.90
Kauppalehti	Business newspaper	Metered paywall	Metered paywall	24.90	31.90
Aamulehti	Regional newspaper	Metered paywall	Metered paywall	15.00	17.00
Etelä-Suomen Sanomat	Regional newspaper	Freemium	Freemium	14.50	14.50
Huvudstadsbladet	Regional newspaper	Freemium	Freemium	14.99	6.90
Ilkka	Regional newspaper	Freemium	Freemium	19.00	19.00
Kaleva	Regional newspaper	Free access	Free access	n/a	n/a
Karjalainen	Regional newspaper	Freemium	Freemium	18.00	18.00
Keskisuomalainen	Regional newspaper	Metered paywall	Metered paywall	19.62	16.90
Satakunnan Kansa	Regional newspaper	Metered paywall	Metered paywall	15.00	12.00
Savon Sanomat	Regional newspaper	Metered paywall	Metered paywall	11.10	16.90
Turun Sanomat	Regional newspaper	Freemium	Freemium	7.90	16.00
MTV	Commercial TV	Free access	Free access	n/a	n/a
Yle	Public service media organisation	Free access	Free access	n/a	n/a
Uusisuomi.fi	Digital born, domestic	Free access	Free access	n/a	n/a
verkkouutiset	Digital born, domestic	Free access	Free access	n/a	n/a
Buzzfeed.com	Digital born, international	Free access	Free access	n/a	n/a
delfi	Digital born, international	Free access	Free access	n/a	n/a
Mashable	Digital born, international	Free access	Free access	n/a	n/a

FRANCE	Type of media	Pay model 2017	Pay model 2019	Monthly price 2017 (€)	Monthly price 2019 (€)
La Croix	Up-market newspaper*	Metered paywall	Metered paywall	17.00	11.90
Le Figaro	Up-market newspaper	Freemium	Freemium	8.90	9.99
L'Humanité	Up-market newspaper*	Freemium	Metered paywall	20.00	9.99
Liberation	Up-market newspaper*	Metered paywall	Metered paywall	8.90	8.00
Le Monde	Up-market newspaper	Freemium	Freemium	17.90	9.99
Les Echos	Business newspaper	Metered paywall	Metered paywall	17.00	36.00
Le Dauphiné Libéré	Regional newspaper	Freemium	Freemium	24.90	24.90
La Dépêche du Midi	Regional newspaper	Freemium	Freemium	9.90	19.90
Dernières Nouvelles d'Alsace	Regional newspaper	Freemium	Freemium	19.90	19.80
L'Est Républicain	Regional newspaper	Freemium	Freemium	19.00	19.00
La Montagne	Regional newspaper	Freemium	Free access	14.50	n/a
La Nouvelle République du Centre-Ouest	Regional newspaper	Free access	Metered paywall	n/a	14.99
Ouest France	Regional newspaper	Freemium	Freemium	4.99	16.99
Le Parisien	Regional newspaper	Metered paywall	Metered paywall	9.99	13.00
Le Progrès	Regional newspaper	Freemium	Metered paywall	19.90	19.90
Sud Ouest	Regional newspaper	Freemium	Freemium	9.90	9.99
Le Télégramme	Regional newspaper	Metered paywall	Freemium	14.99	14.99
La Voix du Nord	Regional newspaper	Metered paywall	Freemium	19.90	19.90
TF1 News	Public service media organisation	Free access	Free access	n/a	n/a
BFM TV	Commercial TV	Free access	Free access	n/a	n/a
CNEWS	Commercial TV	Free access	Free access	n/a	n/a
France Télévisions	Commercial TV	Free access	Free access	n/a	n/a
M6 News	Commercial TV	Free access	Free access	n/a	n/a
L'Express	Weekly newspaper/news magazine	Freemium	Freemium	7.99	8.00
L'Obs	Weekly newspaper/news magazine	Freemium	Freemium	3.90	4.90
Le Point	Weekly newspaper/news magazine	Freemium	Freemium	9.90	9.99
L'Internaute	Digital born, domestic	Free access	Free access	n/a	n/a
Mediapart	Digital born, domestic*	Hard paywall	Hard paywall	11.00	11.00
Buzzfeed	Digital born, international	Free access	n/a	n/a	n/a
Huffington Post France	Digital born, international	Free access	Free access	n/a	n/a
Mashable (with France 24)	Digital born, international	Free access	n/a	n/a	n/a
Slate	Digital born, international	Free access	Free access	n/a	n/a

* In order to avoid leaving out important sites not captured by the overall sampling, this news outlet was strategically added to the original selection.

GERMANY	Type of media	Pay model 2017	Pay model 2019	Monthly price 2017 (€)	Monthly price 2019 (€)
Frankfurter Allgemeine Zeitung	Up-market newspaper	Freemium	Freemium	44.90	19.80
Süddeutsche Zeitung	Up-market newspaper	Metered paywall	Freemium	34.99	36.99
die tageszeitung (taz)	Up-market newspaper*	Free access	Free access/ optional membership/ voluntary payment option	n/a	n/a
Die Welt	Up-market newspaper*	Freemium	Freemium	9.99	9.99
BILD	Mid-market/tabloid newspaper	Freemium	Freemium	4.99	7.99
Handelsblatt	Business newspaper*	Freemium	Metered paywall	34.99	34.99
Augsburger Allgemeine**	Regional newspaper	Metered paywall	Freemium	8.99	9.99
Freie Presse	Regional newspaper	Metered paywall	Metered paywall	4.99	4.50
HAZ	Regional newspaper	Freemium	Freemium	8.99	6.99
Kölner Stadtanzeiger**	Regional newspaper	Free access	Free access	n/a	n/a
Münchner Merkur	Regional newspaper	Free access	Free access	n/a	n/a
Nürnberger Nachrichten	Regional newspaper	Free access	Free access	n/a	n/a
Der Westen	Regional newspaper	Free access	Free access	n/a	n/a
Rheinische Post	Regional newspaper	Free access	Free access	n/a	n/a
Südwest Presse	Regional newspaper	Free access	Free access	n/a	n/a
Thüringer Allgemeine**	Regional newspaper	Freemium	Freemium	7.99	7.99
Westfälische Nachrichten**	Regional newspaper	Free access	Freemium	n/a	9.90
ARD	Public service media organisation	Free access	Free access	n/a	n/a
ZDF	Public service media organisation	Free access	Free access	n/a	n/a
ProSieben	Commercial TV	Free access	Free access	n/a	n/a
RTL	Commercial TV	Free access	Free access	n/a	n/a
SAT.1	Commercial TV	Free access	Free access	n/a	n/a
Der Focus	Weekly newspaper/news magazine	Free access	Free access	n/a	n/a
Der Spiegel	Weekly newspaper/news magazine	Freemium	Freemium	15.60	19.99
Stern	Weekly newspaper/news magazine	Free access	Free access	n/a	n/a
Die Zeit	Weekly newspaper/news magazine (added)*	Freemium	Freemium	17.60	5.00
heftig.de	Digital born, domestic	Free access	Free access	n/a	n/a
news.de	Digital born, domestic	Free access	Free access	n/a	n/a
t-online.de	Digital born, domestic	Free access	Free access	n/a	n/a
Buzzfeed.com	Digital born, international	Free access	Free access	n/a	n/a
Huffingtonpost.de	Digital born, international	Free access	Free access	n/a	n/a

* In order to avoid leaving out important sites not captured by the overall sampling, this news outlet was strategically added to the original selection.

** Inclusion based on aggregated reach.

ITALY	Type of media	Pay model 2017	Pay model 2019	Monthly price 2017 (€)	Monthly price 2019 (€)
L'Avvenire	Up-market newspaper	Free access	Free access	n/a	n/a
Il Corriere della Sera	Up-market newspaper	Freemium	Metered paywall	9.99	9.99
Il Fatto quotidiano	Up-market newspaper	Freemium	Free access	5.99	n/a
Il Giornale	Up-market newspaper	Free access	Free access	n/a	n/a
Libero	Up-market newspaper*	Free access	Free access	n/a	n/a
Il Manifesto	Up-market newspaper*	Metered paywall	Metered paywall	20.00	20.00
La Repubblica	Up-market newspaper	Free access	Freemium	n/a	20.00
Il Sole 24 Ore	Business newspaper	Metered paywall	Metered paywall	20.00	28.50
Il Gazzettino	Regional newspaper	Freemium	Freemium	15.99	15.99
Il Messaggero	Regional newspaper	Freemium	Metered paywall	15.99	15.99
Il Messaggero Veneto	Regional newspaper	Free access	Freemium	n/a	4.00
QN-Il Giorno	Regional newspaper	Free access	Free access	n/a	n/a
QN-La Nazione	Regional newspaper	Free access	Free access	n/a	n/a
QN-Il Resto del Carlino	Regional newspaper	Free access	Free access	n/a	n/a
Il Secolo XIX	Regional newspaper	Free access	Free access	n/a	n/a
La Stampa	Regional newspaper	Freemium	Freemium	19.99	19.99
Il Tirreno	Regional newspaper	Free access	Freemium	n/a	4.00
RAI	Public service media organisation	Free access	Free access	n/a	n/a
La7	Commercial TV	Free access	Free access	n/a	n/a
MEDIASET	Commercial TV	Free access	Free access	n/a	n/a
Sky Italia	Commercial TV	Free access	Free access	n/a	n/a
L'Espresso	Weekly newspaper/news magazine	Freemium	Freemium	5.99	5.99
L'Internazionale	Weekly newspaper/news magazine	Free access	Free access	n/a	n/a
Panorama	Weekly newspaper/news magazine	Free access	Free access	n/a	n/a
Blastingnews	Digital born, domestic	Free access	Free access	n/a	n/a
Blogo	Digital born, domestic	Free access	Free access	n/a	n/a
Citynews	Digital born, domestic*	Free access	Free access	n/a	n/a
Diariodelweb.it	Digital born, domestic	Free access	Free access	n/a	n/a
Fanpage	Digital born, domestic	Free access	Free access	n/a	n/a
Huffington Post Italia	Digital born, international	Free access	Free access	n/a	n/a

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PAY MODELS FOR ONLINE NEWS IN THE US AND EUROPE: 2019 UPDATE

POLAND	Type of media	Pay model 2017	Pay model 2019	Monthly price 2017 (PLN)	Monthly price 2019 (PLN)	Monthly price 2017 (€)	Monthly price 2019 (€)
Gazeta Wyborcza	Up-market newspaper	Metered paywall	Metered paywall	19.90	19.90	4.58	4.58
Nasz Dziennik	Up-market newspaper*	Freemium	Free access	32.20	n/a	7.41	n/a
Rzeczpospolita	Up-market newspaper	Metered paywall	Metered paywall	119.00	59.00	27.37	13.57
Express Ilustrowany	Mid-market/tabloid newspaper	Freemium	Freemium	14.90	40.00	3.43	9.20
Fakt Gazeta Codzienna	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Super Express	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Dziennik Gazeta Prawna	Business newspaper	Freemium	Freemium	97.90	97.90	22.52	22.52
Gazeta Podatkowa	Business newspaper	Freemium	Hard paywall	28.37	28.37	6.53	6.53
Puls Biznesu	Business newspaper*	Hard paywall	Metered paywall	79.00	79.00	18.17	18.17
Echo Dnia	Regional newspaper	Freemium	Freemium	14.90	40.00	3.43	9.20
Gazeta Lubuska	Regional newspaper	Freemium	Freemium	14.90	35.00	3.43	8.05
Gazeta Pomorska	Regional newspaper	Freemium	Freemium	14.90	29.00	3.43	6.67
Głos – Dziennik Pomorza	Regional newspaper	Freemium	Freemium	14.90	29.00	3.43	6.67
Polska Dziennik Bałtycki	Regional newspaper	Freemium	Freemium	14.90	40.00	3.43	9.20
Polska Dziennik Łódzki	Regional newspaper	Freemium	Freemium	14.90	40.00	3.43	9.20
Polska Dziennik Zachodni	Regional newspaper	Freemium	Freemium	8.90	40.00	2.05	9.20
Polska Głos Wielkopolski	Regional newspaper	Freemium	Freemium	14.90	40.00	3.43	9.20
TVP	Public service media organisation	Free access	Free access	n/a	n/a	n/a	n/a
Polsat	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
TVN	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
Gazeta Polska	Weekly newspaper/news magazine*	Hard paywall	Hard paywall	16.67	8.50	3.83	1.96
Newsweek Polska	Weekly newspaper/news magazine	Freemium	Free access	19.99	n/a	4.60	n/a
Polityka	Weekly newspaper/news magazine	Freemium	Freemium	18.99	18.99	4.37	4.37
Wprost	Weekly newspaper/news magazine	Freemium	Free access	19.00	n/a	4.37	n/a
Interia.pl	Digital born, domestic	Free access	Free access	n/a	n/a	n/a	n/a
niezalezna	Digital born, domestic	Free access	Free access	n/a	n/a	n/a	n/a
Onet.pl	Digital born, domestic	Free access	Free access	n/a	n/a	n/a	n/a
Pikio.pl	Digital born, domestic	Free access	Free access	n/a	n/a	n/a	n/a
Wirtualna Polska (WP.pl)	Digital born, domestic	Free access	Free access	n/a	n/a	n/a	n/a

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PAY MODELS FOR ONLINE NEWS IN THE US AND EUROPE: 2019 UPDATE

UNITED KINGDOM	Type of media	Pay model 2017	Pay model 2019	Monthly price 2017 (€)	Monthly price 2019 (€)	Monthly price 2017 (€)	Monthly price 2019 (€)
Guardian	Up-market newspaper	Free access combined with membership	Free access combined with membership	n/a	n/a	n/a	n/a
Daily Telegraph	Up-market newspaper	Freemium	Freemium	8.00	8.00	9.44	9.25
The Times	Up-market newspaper	Hard paywall	Hard paywall	24.00	26.00	28.31	30.06
Daily Express	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Daily Mail	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Daily Mirror	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Daily Record	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Daily Star	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
i	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Sun	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Financial Times	Business newspaper	Hard paywall	Hard paywall	46.00	36.00	54.26	41.62
Aberdeen Press & Journal	Regional newspaper	Metered paywall	Metered paywall	10.00	5.99	11.80	6.92
Express & Star	Regional newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Liverpool Echo	Regional newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Manchester Evening News	Regional newspaper	Free access	Free access	n/a	n/a	n/a	n/a
BBC	Public service media organisation	Free access	Free access	n/a	n/a	n/a	n/a
Channel 4	Public service media organisation	Free access	Free access	n/a	n/a	n/a	n/a
Channel 5	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
ITV	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
Sky News	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
The Economist	Weekly newspaper/news magazine	Metered paywall	Metered paywall	14.70	14.90	17.34	17.22
The Spectator	Weekly newspaper/news magazine	Metered paywall	Metered paywall	10.50	8.99	12.39	10.39
The Week	Weekly newspaper/news magazine	Free access	Free access	n/a	n/a	n/a	n/a
Independent	Digital-only, domestic	Free access	Freemium	n/a	5.99	n/a	6.92
BuzzFeed	Digital-born, international	Free access	Free access	n/a	n/a	n/a	n/a
Huffington Post	Digital-born, international	Free access	Free access	n/a	n/a	n/a	n/a
Mashable	Digital-born, international	Free access	Free access	n/a	n/a	n/a	n/a
Slate	Digital-born, international	Free access	Free access	n/a	n/a	n/a	n/a

PAY MODELS FOR ONLINE NEWS IN THE US AND EUROPE: 2019 UPDATE

UNITED STATES	Type of media	Pay model 2017	Pay model 2019	Monthly price 2017 (\$)	Monthly price 2019 (\$)	Monthly price 2017 (€)	Monthly price 2019 (€)
Los Angeles Times	Up-market newspaper	Metered paywall	Metered paywall	7.96	7.96	6.66	7.08
New York Times	Up-market newspaper	Metered paywall	Metered paywall	15.00	15.00	12.56	13.35
Washington Post	Up-market newspaper	Metered paywall	Metered paywall	9.99	10.00	8.36	8.90
New York Post	Mid-market/tabloid newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Wall Street Journal	Business newspaper	Hard paywall	Hard paywall	32.99	38.99	27.61	34.70
Arizona Republic	Regional newspaper	Metered paywall	Metered paywall	4.99	8.99	4.18	8.00
Boston Globe	Regional newspaper	Metered paywall	Metered paywall	15.96	27.72	13.36	24.67
The Charlotte Observer	Regional newspaper	Metered paywall	Metered paywall	12.99	12.99	10.87	11.56
Chicago Tribune	Regional newspaper	Metered paywall	Metered paywall	7.96	7.96	6.66	7.08
Dallas Morning News	Regional newspaper	Metered paywall	Metered paywall	11.96	11.96	10.01	10.64
Denver Post	Regional newspaper	Free access	Metered paywall	n/a	11.99	n/a	10.67
Detroit Free Press	Regional newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Houston Chronicle	Regional newspaper	Metered paywall	Metered paywall	9.99	9.95	8.36	8.86
Kansas City Star	Regional newspaper	Metered paywall	Metered paywall	12.99	12.99	10.87	11.56
Mercury News (San Jose)	Regional newspaper	Free access	Metered paywall	n/a	9.95	n/a	8.86
Miami Herald	Regional newspaper	Metered paywall	Metered paywall	12.99	12.99	10.87	11.56
New York Daily News	Regional newspaper	Free access	Metered paywall	n/a	7.96	n/a	7.08
Oregonian	Regional newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Orlando Sentinel	Regional newspaper	Metered paywall	Metered paywall	7.96	7.96	6.66	7.08
Philadelphia Inquirer	Regional newspaper	Free access	Metered paywall	n/a	14.00	n/a	12.46
Plain Dealer (Cleveland)	Regional newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Seattle Times	Regional newspaper	Metered paywall	Metered paywall	15.96	15.96	13.36	14.20
Star Ledger (NJ)	Regional newspaper	Free access	Free access	n/a	n/a	n/a	n/a
Star Tribune (Minneapolis)	Regional newspaper	Metered paywall	Metered paywall	15.16	15.16	12.69	13.49
Times-Picayune (NOLA)	Regional newspaper	Free access	Free access	n/a	n/a	n/a	n/a
ABC News	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
CBS News	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
CNN	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
Fox News	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
MSNBC News	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
NBC News	Commercial TV	Free access	Free access	n/a	n/a	n/a	n/a
NPR News	Public service media organisation	Free access	Free access	n/a	n/a	n/a	n/a
The Atlantic	Weekly newspaper/news magazine	Free access	Free access	n/a	n/a	n/a	n/a
The New Yorker	Weekly newspaper/news magazine	Metered paywall	Metered paywall	7.49	7.49	6.27	6.67
Newsweek	Weekly newspaper/news magazine	Free access	Free access	n/a	n/a	n/a	n/a
Time Magazine	Weekly newspaper/news magazine	Free access	Free access	n/a	n/a	n/a	n/a
BuzzFeed News	Digital born, international	Free access	Free access	n/a	n/a	n/a	n/a
HuffPost	Digital born, international	Free access	Free access	n/a	n/a	n/a	n/a
MSN News	Digital born, international	Free access	Free access	n/a	n/a	n/a	n/a
Politico	Digital born, international	Free access	Free access	n/a	n/a	n/a	n/a
Vox.com	Digital born, international	Free access	Free access	n/a	n/a	n/a	n/a
Yahoo! News	Digital born, international	Free access	Free access	n/a	n/a	n/a	n/a