



DIGITAL NEWS PROJECT

JANUARY 2020

Journalism, Media, and Technology Trends and Predictions 2020

Nic Newman

With additional essays by
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REUTERS
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About the Authors

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Acknowledgements

The authors are grateful for the input of 233 digital leaders from 32 countries, who responded to a survey around the key challenges and opportunities in the year ahead.

Respondents included almost 50 editors in chief, almost 40 CEOs or managing directors, and 30 heads of digital and came from some of the world's leading traditional media companies as well as digital-born organisations (see full breakdown at the end of the report).

Survey input and answers helped guide some of the themes in this report. Many quotes do not carry names or organisations, at the request of those contributors.

As with many predictions reports there is a significant element of speculation, particularly around specifics, and the report should be read bearing this in mind. Having said that, any mistakes – factual or otherwise – should be considered entirely the responsibility of the authors.

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Executive Summary

This year's report adopts a new format which highlights the views of digital leaders on the key issues facing the news industry and combines this with five forward-looking contributions from the Reuters Institute. The main purpose is to provide useful insights for the year ahead and to identify the most important media trends.

The last ten years were defined by the twin technological disruptions of mobile and social media, which fragmented attention, undermined advertising-based business models, and weakened the role of journalistic gatekeepers. At the same time, social and political disruptions have affected trust in journalism and led to attacks on independent news media in many countries. The next decade will be defined by increasing regulation of the internet and attempts to re-establish trust in journalism and a closer connection with audiences. It will also be rocked by the next wave of technological disruption from AI-driven automation, big data, and new visual and voice-based interfaces. All this against a backdrop of economic and political uncertainty which will throw up further challenges to the sustainability of many news organisations.

But how do media leaders view the year ahead?

- Most industry executives say they are confident about their own company's prospects but are much less sure about the future of journalism. Local news provision is a key concern, alongside fears about declining trust and attacks on journalism by politicians.
- The majority of respondents (85%) think that the media should do more to call out lies and half-truths, but some worry that this might not be enough as more politicians around the world pick up Donald Trump's media playbook, undermining mainstream media and using social media to push messages directly to supporters.
- Publishers continue to bet strongly on reader revenue, with half (50%) saying this will be their main income stream going forward. Around a third (35%) think that advertising *and* reader revenue will be equally important, with just one in seven (14%) pinning their hopes on advertising alone.
- The power of tech platforms remains an issue of great concern for most publishers. But there are mixed views on regulation. Publishers feel that interventions by policymakers are more likely to hurt (25%) rather than help (18%) journalism, with the majority feeling that it will make no difference (56%).
- It looks set to be another big year for podcasting, with over half of our publisher respondents (53%) saying podcast initiatives would be important to them this year. Others are looking at voice and turning text articles into audio as a way of capitalising on the growing popularity of audio formats.
- We're likely to see more moves by news organisations to personalise front pages and pursue other forms of automated recommendation this year. Over half of our respondents (52%) say these AI-driven initiatives will be very important this year, but smaller companies worry about being left behind.

- Attracting and retaining talent is a major worry for news organisations, especially in technology areas. Less than a quarter of respondents say they are confident about keeping data scientists and technologists (24%) compared with 76% for editorial staff. Tech companies and consumer brands can often offer higher salaries, more job security, and a culture within which they can do their best work.
- Publishers and broadcasters say they have made big strides over gender diversity in the newsroom, with three-quarters (76%) believing their organisation is doing a good job. However, they rate themselves less well on geographical (55%), political (48%), and racial diversity (33%).

On the cards in 2020 ...

- More websites will demand registration details in return for content this year. Collecting first-party data will become a key focus for publishers, following reduced cookie support from leading browsers and tightening privacy regulations. But this risks putting further barriers in the way of casual news users.
- Elections around the world will be another chance for purveyors of misinformation and disinformation to try new tactics, including AI technologies, to overwhelm platform defences. The role of platforms will be increasingly politicised, with direct attacks and accusations of bias from prominent politicians.
- Better, more immersive, feature-rich headphones (e.g. AirPods Pro and similar devices) will prove the big tech hit of the year and give a further boost to audio formats.
- 5G networks will continue to roll out in cities around the world this year, though handset availability remains limited. Ultimately 5G will enable faster and more reliable smartphone connectivity, making it easier to access multimedia content on the go.
- Transcription, automated translation, and speech-to-text text-to-speech services will be some of the first AI-driven technologies to reach mass adoption this year, opening up new frontiers and opportunities for publishers.

1. Key Trends and Predictions for 2020

In this section we explore key themes for the year ahead, integrating data and comments from our publishers' survey. For each theme we lay out a few suggestions about what might happen next.

1.1 Business Outlook More Positive than for Years, but Worries about Journalism Persist

Almost three-quarters of our respondents (73%) say they feel confident or very confident about their company's prospects in 2020. It's a surprisingly upbeat assessment given continuing editorial and commercial uncertainty but reflects optimism amongst many publishers that reader revenue and diversification strategies are starting to pay off.

These same media executives, however, are less confident about journalism in general (46%) and public-interest journalism in particular. There is widespread disquiet about the decline of local news and the economic and political pressure on journalists trying to hold the rich and powerful to account.

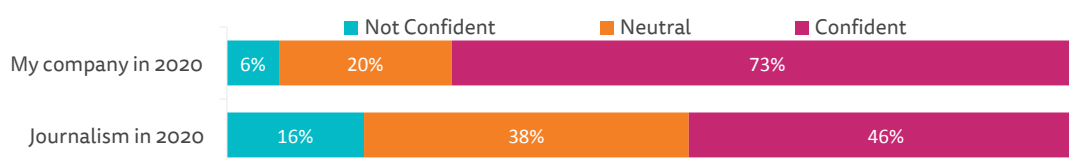
I'm worried that local, legacy newspapers are buffeted by corporate debt, declining ad revenue and a slow transition to digital revenues.

Jeremy Gilbert, Director Strategic Initiatives, Washington Post

It is depressing and concerning to witness the continued attacks upon the free media by heads of state.

Karyn Fleeting, Reach plc, UK

Confidence in my company/the state of journalism



Q1/2. To what extent are you confident about your company's prospects/journalism's prospects in the year ahead? N=230

One notable trend is lack of confidence from public service broadcasters (PSBs), many of whom face rapidly falling audiences for linear output, growing competition from Netflix and Spotify, and, in many cases, attacks on news output from populist politicians and commercial media owners. Average confidence from respondents from a PSB background was just 46% compared with the overall average of 73%. These numbers are influenced by recent or upcoming budget cuts in a number of countries, including Denmark, Australia, and the UK.

READER REVENUE FOCUS

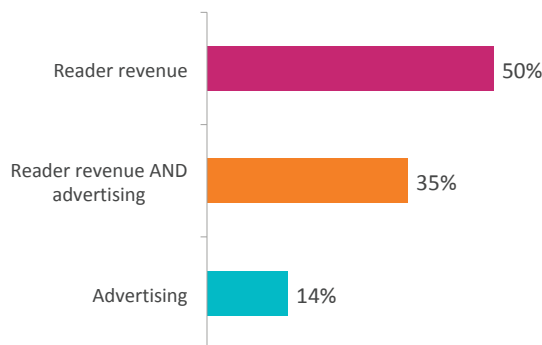
By contrast, commercial media, especially those at the quality end of the market, are increasingly confident about the future of paid content, with both large and small companies hitting important milestones in the past year. The *New York Times* has 4.9 million digital and print subscribers, almost

halfway to its 10 million goal.¹ The *Financial Times* broke through its 1 million subscriber target, while the *Guardian* returned to profit – after years of heavy losses – off the back of more than 1 million reader contributions over the past three years.² News executives across many countries tell us that reader revenue is providing stable and growing income while advertising has remained volatile, with many reporting worse than expected results in 2019.

Growth engines, reader revenue specifically, has very positive prospects; advertising revenue remains a major concern.

Jon Slade, Chief Commercial Officer, FT

Most important revenue stream for my company going forward?



Q3. Thinking about your own company, which of the following statements do you agree with most. Reader revenue will be the most important revenue stream going forward/reader revenue and advertising will be equally important/advertising will be most important. N= 189

But it is not just big companies that are making reader revenue work. Smaller publications are also finding success through a variety of subscription and membership models. Investigative news site Follow the Money in the Netherlands and slow-news operation Zetland in Denmark are amongst those hitting tipping points around profitability:

Due to a very successful ambassador campaign (member-get-member) this year we had a 25% growth in August and our budget is now for the first-time balancing.

Lea Korsgaard, Editor in Chief, Zetland, DK

We have solid base of subscribers and we know [this] makes our audience grow and keeps our churn low. We are convinced that the subscription model is future proof.

Jan-Willem Sanders, Publisher, Follow the Money, NL

This year will see southern European media houses leaning more into subscription. In Spain, *El Mundo* has already started to charge for premium content, with *El País* set to follow early in 2020. It is already asking readers to sign in (for free) to read opinion and weekend features in preparation for

¹ <https://www.nytimes.com/2019/11/06/business/media/new-york-times-earnings.html>

² <https://www.theguardian.com/media/2018/nov/05/guardian-passes-1m-mark-in-reader-donations-katharine-viner>

Payment options at El Mundo

EL MUNDO

La verdad por incómoda que sea en el formato que tú elijas

Trabajamos para descubrir lo que hay detrás de cada noticia y compartirlo contigo

Mensual ☒ Anual ☐

| Orbyt | Premium | Papel |
|---|--|--------------------------------------|
| La versión digital de tu periódico en papel | Acceso ilimitado a todo el contenido web | Edición impresa + Acceso a Orbyt |
| 9,99€ 13,99€ -30% | 1€ / Primer mes | 64,99€ 92,99€ -30% |
| 6,99€ / mes | Después 7,99 € / mes | 43,38€ / mes |
| Y además un SMARTWATCH de regalo | | Y además un SMARTWATCH de regalo |
| Lo quiero | Lo quiero | Lo quiero |
| Saber más | Saber más | Saber más |

the change. This is a major shift of direction for publications that until recently have pursued a scale-based strategy (which has sometimes led to accusations of clickbait and low-quality journalism).

Other regional chains such as Vocento and Prensa Ibérica have established paywalls in most of their titles, while the independent sector is strengthening membership and or donation options.

WHAT TO EXPECT IN 2020?

Crumbling cookies? Publishers will be pushing aggressively ahead with registration and log-in strategies following data privacy regulation and tightening restrictions on cookies by anti-ad-tracking browsers like Safari and Firefox. First-party data will be at a premium going forward but this is likely to further benefit platforms like Google and Facebook, which have hundreds of millions of authenticated and logged-in users. By contrast individual news publishers may struggle to persuade consumers to keep logging in. Expect more publisher alliances, like NetID³ in Germany and Nonio⁴ in Portugal, to counter this trend.

More consolidation. Declining margins in the face of falling readership and growing platform power have already led to a series of mega mergers, leading to new questions around plurality and concentration of ownership. US-based regional newspaper chains Gannett and GateHouse Media combined forces in November to create a conglomerate that will own around one in six daily titles in the US. Vice acquired Refinery 29 and Vox Media bought *New York Magazine* in eye-catching deals that create both scale and complementary audiences. In the UK the group that owns the *Daily Mail* added the *i* newspaper to a stable that includes the *Metro* freesheet – giving it around 30% of the national newspaper market. Troubled regional publisher JPI Media is up for sale, likely to be bought by Reach plc or Newsquest, and national broadsheet the *Daily Telegraph* is also rumoured to be on the market. In the past many of these mergers have destroyed value, so the focus is likely to be on keeping editorial propositions distinct while integrating back-end systems like technology, data, and ad tech.

Editorial partnerships. With publishers realising that they can't cover every option, they are increasingly looking for partnership opportunities. In the recent UK election, Sky News teamed up with BuzzFeed News to help tap into the social conversation. In return BuzzFeed got access to brand exposure with a much bigger audience. In podcasting, partnerships are the order of the day, with Gimlet working with the *Wall Street Journal* and Slate and *The Economist* getting together to produce the Secret History of the Future.

³ <https://enid.foundation/>

⁴ <https://nonio.net/>

Subscription avoidance. With more publishers after our money, people will encounter more and more paywalls, and consumers will be increasingly aware of how to get around them. Most people are willing to subscribe to only one or two digital sources of news,⁵ but might still be interested in accessing more. Loopholes around incognito browsing are increasingly being closed by registration strategies, but sophisticated paywall blockers are emerging that can open up all but the most secure websites. Consumers will also become savvier about looking for special deals at renewal time.

See also

Section 2.1, Rasmus Kleis Nielsen, 'Building the Business We Want'

Section 2.5, Eduardo Suárez, 'Making Readers Pay'

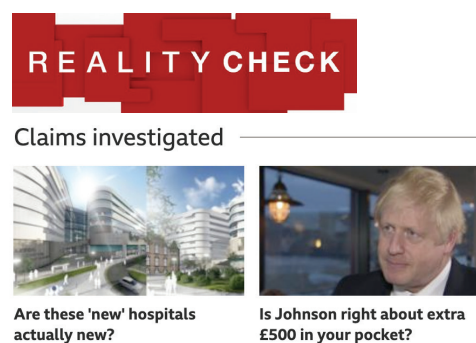
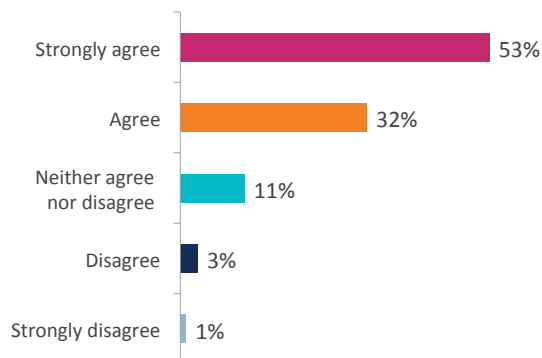
1.2 Post-Truth Politics and the Journalistic Response

The UK election was yet another example of politicians playing fast and loose with the facts, avoiding journalistic scrutiny, and denigrating the media. 'It's been the most shallow, mendacious and frustrating election I can remember and a bad advertisement for democracy,' declared veteran political analyst Peter Kellner.⁶ The UK's independent fact-checking organisation, Full Fact, said the six-week campaign saw 'inappropriate and misleading campaign tactics that we hadn't seen before'. These included an official Conservative Party Twitter account impersonating a fact-checking organisation and editing footage of a Labour politician to make it look as if he couldn't answer a question about the party's Brexit policy.

The media integrated fact-checking into coverage and scrutinised politicians wherever possible, but these TV interviews and debates are watched by fewer and fewer people. Politicians are increasingly trying to bypass the media and convey messages directly via social media. Boris Johnson declined an invitation to be interviewed by the BBC's toughest interviewer Andrew Neil and hid in a fridge to avoid another TV interview. Channel 4 replaced Johnson with a melting ice sculpture when he refused to turn up for a leader debate on climate change. In the wake of these challenges, the Tories briefed journalists that they would review both Channel 4's broadcasting licence and the funding mechanism for the BBC.⁷

In our survey, 85% agreed with the proposition that the media should do more to call out lies and half-truths, but it is not clear that this approach cuts through with audiences, and it may even be hardening criticism of the media from both left and right.

The news media should do more to call out misleading statements and half-truths by politicians



Q7. To what extent do you agree with the following statement: The news media should do more to call out misleading statements and half-truths by politicians. *N*=223

⁵ <http://www.digitalnewsreport.org/survey/2019/paying-for-news-and-the-limits-of-subscription/>

⁶ <https://www.ft.com/content/bb8a781a-1c1f-11ea-9186-7348c2f183af>

⁷ <https://www.theguardian.com/media/2019/dec/15/boris-johnson-threatens-bbc-with-two-pronged-attack>

As more politicians around the world pick up Donald Trump's media playbook, these dilemmas will become more acute in the year ahead. The media have become more robust in aggressively fact-checking since the events of 2016, but a number of publications that run these teams told us they fear this is not having 'any impact on large parts of the public'.

The lack of consequences for a President who lies repeatedly has only emboldened a generation of politicians to give up any commitment to truthfulness. It's grim out there.

Leading US publisher

See also

Section 2.2, Meera Selva, 'Journalism under Fire'

But responses are not obvious and the news media often don't help by sometimes or often repeating or amplifying lies and misleading narratives. Even among those who try to challenge falsehoods and blatant spin, publishers worry that devoting time to fact-checking can divert resources and attention from other journalistic endeavours. Others say that there is often a fine line between 'calling out a statement and perceptions of partisanship', which may undermine trust with readers, listeners, and viewers. The media might also take note of our own research which shows that the public often feels that politicians (and other public figures) often don't get a fair hearing⁸ and that the media takes an overly negative view of events.⁹ Some hope for a more nuanced response than just calling out politicians in the year ahead:

We certainly need to offer fact checks and reality checks. But we also need content which explores good faith politics, what might be working, how policy develops and makes a difference. Otherwise we will push our audiences to disengage and distrust politics even more.

Mary Hockaday, Controller, BBC World Service

I'm always optimistic about the industry – but this year I worry more about reader fatigue and news avoidance than I ever have before. Clearly this is a problem for democracy and debate, not just for the industry.

Sarah Marshall, Head of Audience Growth, Conde Nast

The issues of disengagement and news avoidance are a growing concern for many executives. Countering cynicism and negativity is likely to become a more important theme for journalists in the year ahead.

PLATFORM RESPONSIBILITY

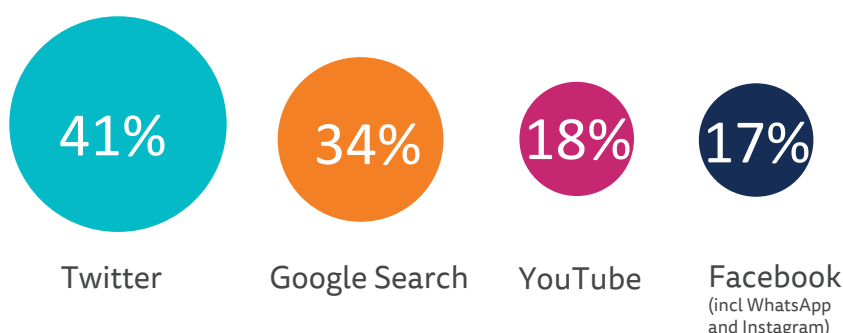
Journalists are as critical of tech platforms as they are of politicians when it comes to misinformation and disinformation. In this year's survey they are damning in their verdict about platforms' attempts to clean up the problem. Less than one in five (17%) gave Facebook credit for their efforts in the last year, despite it removing billions of accounts, stepping up funding for fact-checking, and increasing transparency around political advertising. YouTube rated at just 18% in a year when it has promoted reputable sources around breaking news events and introduced new information panels flagging misinformation. Google search rated marginally better at 34%, after changes to its algorithms that have surfaced more original and local journalism in results. Twitter scored 41%, possibly due to their recent stance on banning all political advertising on its platform.

⁸ <https://reutersinstitute.politics.ox.ac.uk/our-research/how-young-people-consume-news-and-implications-mainstream-media>

⁹ 45% in the UK say the news media is often too negative, 39% average of all countries. *Digital News Report 2019* – <http://www.digitalnewsreport.org/survey/2019/what-do-people-think-about-the-news-media/>

How publishers rate platforms in the fight against misinformation

Percentage rating 3, 4, or 5 (average or above)



Q8. To what extent do you think that the following platforms have done enough in the last year to combat misinformation and disinformation? N=221

But the overall message from publishers is that these efforts are nowhere near enough to combat the scale and scope of the problem.

All the tech platforms spend a tiny fraction of their vast revenues and technology resources on this area, despite fair, transparent media being an absolutely vital ingredient of a healthy, functioning democracy. Most of their efforts feel like lip service to appease regulators.
UK publisher

Our survey also reveals the different approaches between Europe and the US in terms of where the limits of free speech should lie.

Most platforms still hold the position 'if it's not criminal, it's free speech', which is unacceptable. Once more, they take the money, and leave the costly work (fact-checking, counter-arguing, etc.) to journalists from media outlets.
Vinzenn Schmid, Strategy, SRG SSR, Switzerland

It is hard to separate the responsibility of platforms from the wider tensions in society that are fuelling these trends. And without clear guidance on the limits to free speech Silicon Valley companies are increasingly being asked to make more editorial judgements on which content should be removed or demoted. Whatever they do, it is hard to see platforms pleasing publishers or politicians in 2020.

WHAT TO EXPECT IN 2020?

Platform regulation bites. In some countries (e.g. the UK) we are likely to see a new technology regulator this year with powers to oversee an enforceable code of conduct for the biggest players, such as Facebook and Google, and new rules to give consumers more control over their data. But issues around free speech and elections will be much harder to regulate. Politicians will largely duck these challenges again in 2020.

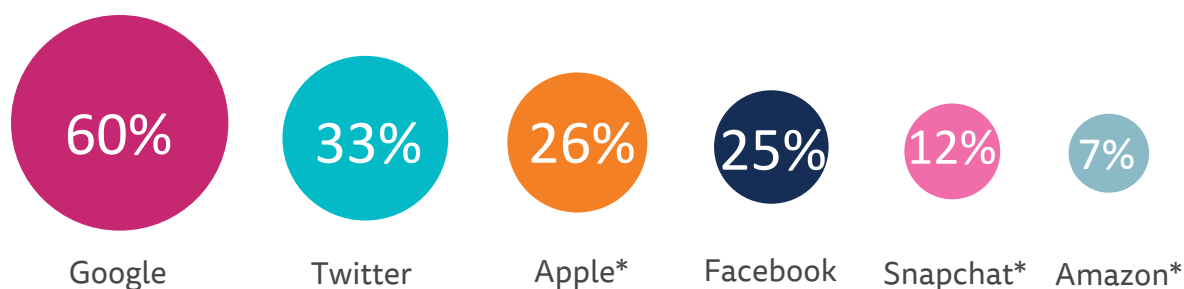
US election focus. Social media will be in the spotlight in the run-up to the November presidential election, with coordinated campaign activity and increasingly vocal accusations of platform bias from the right as well as some voices on the left. Expect more smears against candidates and attempts by domestic actors to create coordinated campaigns across networks – and for arguments to rage about whether false or misleading political messages should be fact-checked or given less prominence. Closed groups on Facebook and WhatsApp, where it is harder to monitor and rebut false information, will become an increased area of focus.

1.3 Platforms and the Relationship with Journalism

Our digital leaders survey shows publishers remain more positive about Google and Twitter than Apple, Facebook, Snapchat, and Amazon when it comes to initiatives to support journalism. Over half of respondents rated Google as average or better but all other platforms attracted more negative than positive sentiment, and there is a considerable amount of cynicism about underlying motives across the board.

How publishers rate platforms in supporting journalism

Percentage rating average or above on five-point scale (3, 4, or 5)



Q9. To what extent do you think that the following platforms have done enough to support journalism? N=221

*these figures are low partly due to large number of don't knows – 13% for Apple, 26% for Amazon, 38% Snapchat, compared with just 2% for Google and 3% for Facebook.

Google's higher score is reflective of the large number of publishers in our survey who are current or past recipients of Google's innovation funds (DNI or GNI), and who collaborate with the company on various news-related products. Facebook's lower score may reflect historic distrust from publishers after a series of changes of product strategy which left some publishers financially exposed. In the last year, however, Facebook has stepped up its commitment to journalism, with several new product initiatives as well as a commitment to invest around \$300m in journalism-related initiatives over the coming years.

The overall sense from our survey, however, is that publishers do not want hand-outs from platforms but would prefer a level playing field where they can compete fairly and get proper compensation for the value their content brings.

Few of the platforms take the business of journalism seriously. Funds and small bits of industry engagement won't cut it. The industry needs real and meaningful business models for journalism. Apple News+ achieves the opposite, which is profiteering for Apple while conditions for publishers are appalling.

Global publisher

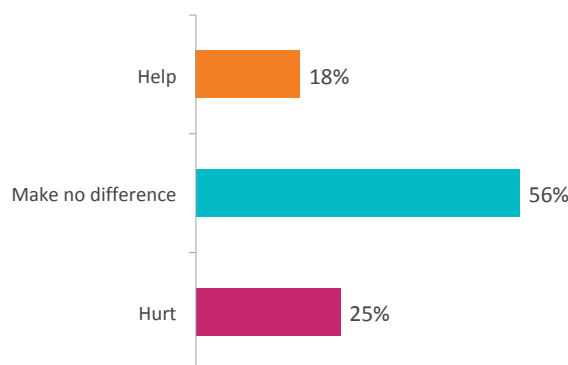
Policymakers continue to talk about different kinds of intervention to help the news industry. These include enforcing the EU's new copyright directive, often referred to as the 'link tax' because it requires platforms to pay for unlicensed content that appears in aggregated news services. The process is a direct result of lobbying by big publishing houses but got off to a rocky start in France, the first member state to implement the directive, with Google opting to display less information in search results rather than set a costly precedent. With publishers turning to the courts and both sides digging in, the only guaranteed winner this year is likely to be the legal profession.

More positively, the EU has already taken other action to help news organisations, including allowing member states to exempt digital publications from VAT, while a number of governments

around the world are looking at issues of transparency and excessive fees in the digital advertising market. As we have documented in a recent report, policymakers have a range of actionable options if they want to create a more enabling environment for independent professional journalism, including steps to protect media freedom, enhance the sustainability of the news business, and help the industry and the profession work towards its digital future.¹⁰

Whether policymakers will take such steps remains an open question but in our survey publishers feel that interventions are more likely to hurt journalism (25%) rather than help it (18%), with the majority feeling that it will make no difference (56%).

Will policy making interventions help or hurt journalism this year?



Q13. Do you expect policymaker interventions to help or hurt journalism this year? N=217

WHAT TO EXPECT IN 2020?

Facebook's News Tab goes global. As this rolls out beyond the United States, we can expect more arguments about who should be included and how much publishers should be paid. Perhaps the bigger question, though, is whether consumers will show any attention to a walled garden full of tried and trusted news brands. Our own research suggests news is more of an incidental part of the Facebook experience rather than a destination for news, and it may be hard to shift those behaviours. Mark Zuckerberg's publicly stated goal is for tens of millions of users – just a small percentage of Facebook's 2 billion global user base.

Controlled off-platform news. Facebook's news tab is part of a wider trend, with platforms looking to create trusted and curated environments for news rather than mixing it with user-generated content. YouTube have started to inject trusted brands into the feed when big stories break and Google's carefully selected news index does a similar job for AI-driven products like Discover. We're also seeing more humans involved in the process, with platforms hiring editors to manage the nuances.¹¹

1.4. Diversity and Talent in the Newsroom

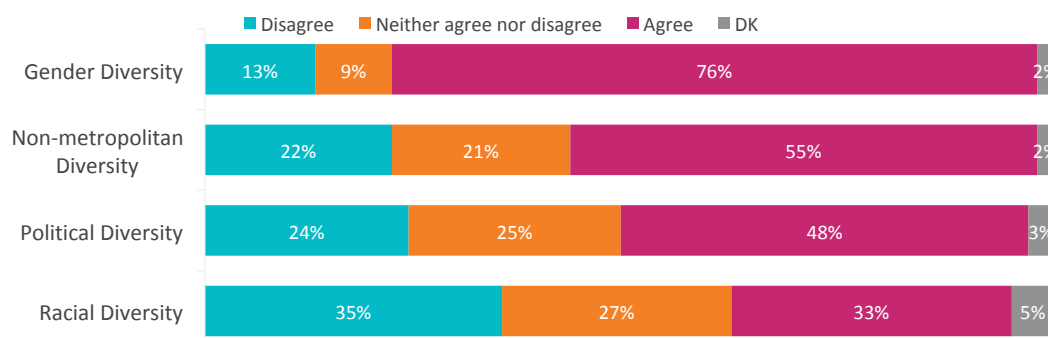
In the last few years, the industry has woken up to the lack of diversity in newsrooms and the difficulties this creates in representing societies fairly and accurately. Much of the recent focus has been on gender, following the #MeToo movement, the exposure of pay gaps in the UK, and deep-seated sexist attitudes in French newsrooms. But there has also been soul-searching after Brexit, Donald Trump, and the Gilets Jaunes protests about the lack of political diversity in journalism and the failure to understand concerns of those outside the big cities.

¹⁰ <https://reutersinstitute.politics.ox.ac.uk/risj-review/what-can-be-done-digital-media-policy-options-europe-and-beyond>

¹¹ <https://www.cnn.com/2019/08/20/facebook-is-hiring-journalists-to-curate-its-news-tab.html>

Our publisher respondents say they have made big strides over gender diversity, with three-quarters (76%) believing their organisation is doing a good job. However, they rate themselves less well on diversity from non-metropolitan areas (55%), on political diversity (48%), and on racial diversity (33%). Critics will argue that these relatively high figures reveal complacency amongst news executives and that much more still needs to be done.

My news organisation is doing a good job with ...



Q5. To what extent do you agree with the following statements? *N*=227

Within these averages we can detect significant regional differences, with Scandinavian publishers much more confident about gender diversity than publishers in other parts of Europe. Overall, women were much more sceptical about the rate of progress than men:

In France ... we are particularly bad at diversity issues. I think this awareness is not yet at the right level in my newsroom.
Top French print publisher

Others report progress at more junior levels, but with editorial decision-making often still in the hands of men:

Portuguese media is very gender balanced ... except when it comes to editors in chief.
Catarina Carvalho, Executive Editor, *Diario de Noticias*

There was widespread recognition in our survey about the need to expand recruitment beyond liberal urban elites. Digital-born brands in particular have used remote working to help increase diversity, but in countries like South Africa remote working is harder to pull off and the economics often don't stack up:

Pressure on costs and a very disparate geographical country mean it is difficult to sufficiently cover outlying areas, and most media outlets focus on the metro areas.
South African publisher

A recent RISJ report on diversity and talent¹² concludes that journalists must reach out to audiences that are becoming more and more diverse, while newsrooms need to be made attractive to new entrants who have to be convinced that the news business has a future.

¹² *The Struggle for Talent and Diversity in Modern Newsrooms: A Study on Journalists in Germany, Sweden, and the United Kingdom.*
https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2019-07/Talent-and-Diversity-in-the-Media-Report_o.pdf

Our survey shows that publishers feel this is going to be easier in editorial areas (76% confidence) than in data science/technology (24%), or product (39%). Here, there is intense competition with tech platforms and consumer brands who can often offer higher salaries, more job security, and a culture within which individuals can do their best work.

The competition for tech and data talent is intensifying. Google and Facebook are hiring relentlessly in London. In 2019 we lost a number of team members directly to them, but indirectly we also see significant upward pressure on salaries.
UK publisher

Confidence about attracting and retaining talent in different areas

Percentage saying extremely or very confident

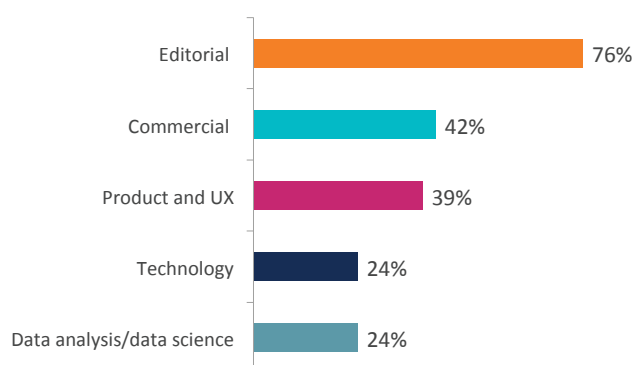


Photo: Shutterstock/Issedesigner

'The journalism industry as a whole still does not recognise new skills on par with a great reporter'
UK print publisher

Q6. How confident are you that your organisation can attract and retain the talent you need in the following areas? N=225

Despite the general confidence over editorial retention, there are some hot spots. The Athletic, when it launched its sports subscription service in the UK, hoovered up some of the best national and regional talent, reportedly doubling the salaries of many reporters in the process. Another difficult area is audio, where there is a fight for on-air talent and the best podcast producers, with publishers and broadcasters competing with tech platforms like Spotify and independent studios.

We are less confident about younger editorial staff (below 30). They tend to drift toward podcasting and pure digital players and away from more text-based newsrooms.
Troels Jørgensen, Digital Director, Politiken

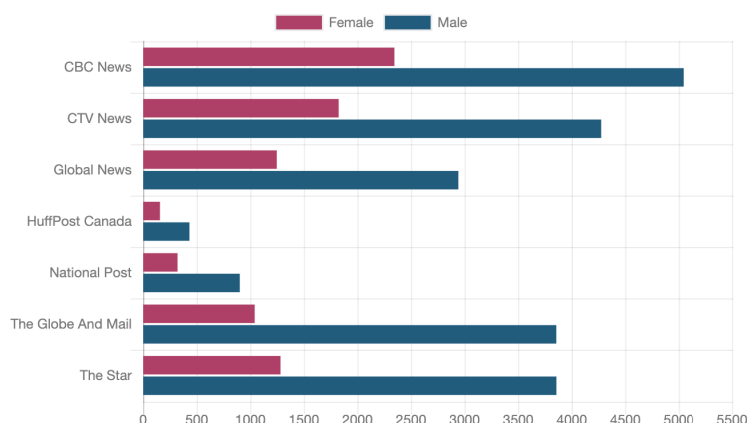
Overall, many publishers are holding on to the hope that the 'excitement of working in media and being able to have a positive societal impact' will continue to attract talent even when pay and material conditions are better elsewhere.

WHAT TO EXPECT IN 2020?

Initiatives to increase diversity. Some news organisations have started to impose their own targets for gender balance in terms of contributors. The BBC's 5050 project started as a grassroots project with 500 teams joining voluntarily and the vast majority of these (75%) hitting these targets.

More software tools to help measure diversity. Elsewhere, online sites are being increasingly supported by software tools that give real-time readouts for editors. We're likely to see more external monitoring of media performance this year as with this gender gap tracker of the Canadian media (currently showing an over-representation of male contributors in top outlets). Expect these tools to start to illustrate lack of diversity in other areas too.

Ratio of male and female sources by news outlet



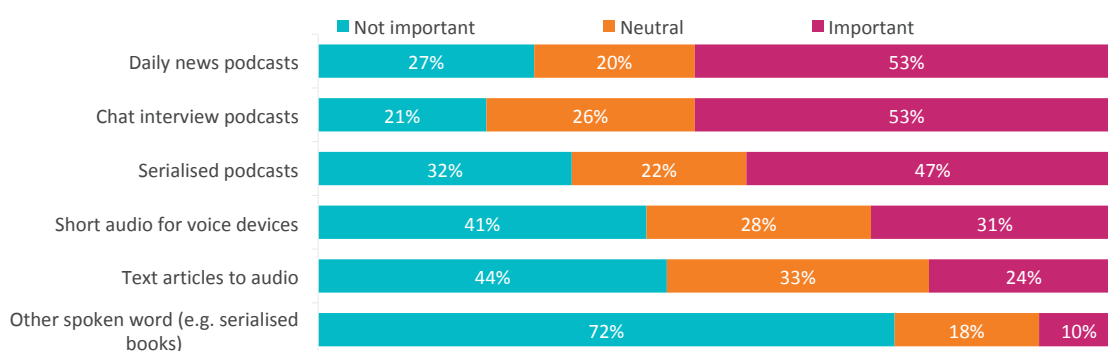
See also

Section 2.4, Lucy Kueng, 'Handling Inter-Generational Tensions in News Media

1.5 New Golden Age of Audio, but Where's the Cash?

It looks set to be another big year for podcasting, with over half of our publisher respondents saying they would be pushing various types of podcast initiative this year. Our recent report on *News Podcasting and the Opportunities for Publishers*¹³ found that the success of the Daily from the *New York Times* – and growing interest from blue-chip advertisers – was encouraging publishers. We identified 60 daily news podcasts in five countries, the majority of which started in the last 18 months – and more are on the way. *The Times* of London is one of many that will launch a daily news podcast in 2020. Others are investing in chat/interview formats or documentaries, with *Le Monde*, for example, recently releasing three new podcast series adapted from investigative articles.¹⁴

Important audio initiatives for 2020



Q10. There are new opportunities opening up in audio and voice with growing audiences and advertising revenue, to what extent will the following initiatives be important for your company in 2020? *N*=217

Bigger audiences, better measurement, and easier access have combined to change the economics of news podcasting. In turn this is encouraging publishers to invest in creating more quality content and platforms to invest in better distribution and monetisation, in a virtuous circle of growth. Publishers see podcasting as a chance to attract younger audiences, build habit, and bring in additional revenue.

¹³ <https://reutersinstitute.politics.ox.ac.uk/news-podcasts-and-opportunities-publishers>

¹⁴ <https://digiday.com/media/le-monde-debuts-three-podcasts-based-on-stories-that-convert-subscribers/>

In the US podcasting revenue is projected to grow by around 30% a year to reach over \$1bn by 2021,¹⁵ but elsewhere revenues have been slower to build and, despite the clear audience opportunity, many publishers are still holding back:

The problem [with] audio is the difficulty of monetisation, since advertisers are currently not investing in Spain.

Vicente Ruiz Gómez, Managing Editor Digital, *El Mundo*, Spain

Audio and voice feels increasingly important but we're still some way from generating enough engagement or revenue to provide any sort of return on the not inconsiderable investment required to do it to any reasonable standard.

National publisher, UK

Subscription-based organisations are holding back for different reasons. There are few opportunities to make premium audio work – and little platform focus in this area. Meanwhile broadcasters have no option but to invest in a range of audio-on-demand options to protect their market position and to attract younger and diverse audiences. Public broadcasters are experimenting with new on-demand audio for voice devices, developing short bulletins and trialling interactive formats. The BBC is investing hard, along with NPR, ABC in Australia, and Swedish Radio (SR), but there is huge concern that platforms will use this content to build their own businesses in this area.

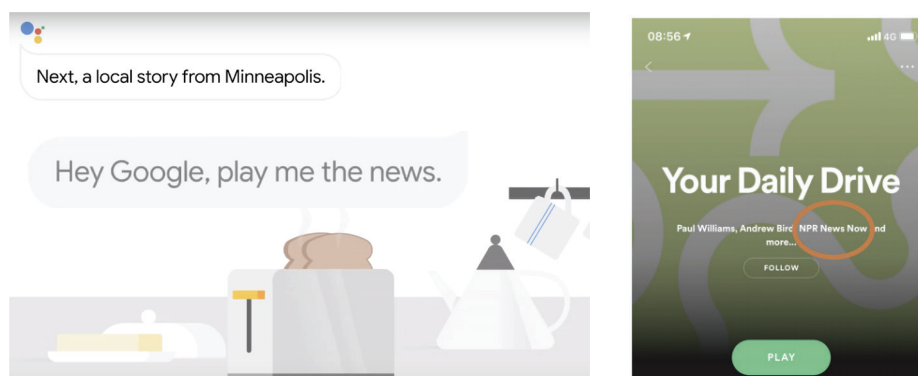
This year we'll see further tension between broadcasters and platforms, with 'content boycotts' and a greater use of windowing strategies where content is released first on broadcaster apps.

We have ambitious plans for live, podcasts, and news clips. The strategic choice ahead is how much to do and release to external platforms like Spotify and Google.

Olle Zachrisson, Head of News, Swedish Radio

The international roll-out of Google's audio news aggregation service, and Spotify Drive, which mixes music playlists with short news audio content, could be another flashpoint. Broadcasters fear their direct connection with audiences will be lost in these aggregated services.

Some publishers are boycotting audio aggregation services from Google and Spotify



¹⁵ IAB Podcast Ad Revenue Study June 2019 https://www.iab.com/wp-content/uploads/2019/05/Full-Year-2018-IAB-Podcast-Ad-Rev-Study_5.29.19_vFinal.pdf

Print publishers have less to lose, though many remain wary about repeating past mistakes:

Publishers have rightly held back on providing audio content for aggregated news services, until there is a clear path towards monetisation. Google will spend money effectively licensing audio news content in 2020, so we will see whether it can become a financially sustainable news product.

UK news publisher

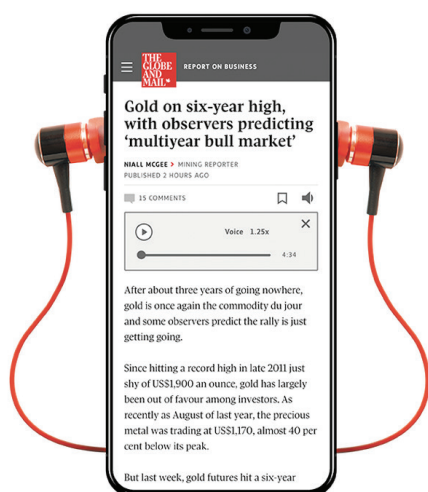
WHAT TO EXPECT IN 2020?

Podcasting beyond the English language. Much of the action so far has been confined to the US and a handful of English-speaking countries, but this is set to change. Brazil is now the second largest market for podcasting in the world, according to some measures,¹⁶ and will be a major focus for both Google and Spotify this year. Spain and France are also seeing strong audience growth and the development of independent podcast studios.

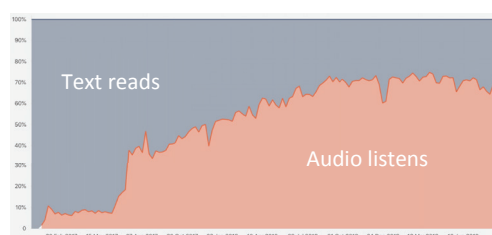
Audio articles as standard. Improved technology is enabling new opportunities for publishers in quickly reversioning text output into audio. In Canada, the *Globe and Mail* is one of the first publishers to use Amazon Polly, a text-to-speech service that sounds far more natural to the human ear than previous versions. Subscribers can listen to selected articles in English, French, and Mandarin and choose their favourite voice.¹⁷

In Denmark, 'slow-news' operation Zetland provides all its stories with a (human-read) audio option. Around 75% of all stories are now listened to rather than consumed via text (pink block in chart below) – perhaps a sign of things to come for other publishers. Meanwhile in Brazil the newspaper *Estadão* has teamed up with Ford to create a human-read daily audio service for Spotify. Each part of the newspaper has its own album, each news story has its own track. Many publishers see connected cars as a new opportunity to reach audiences and audio as a key way to deliver journalism in the future.

Globe and Mail: Audio in many languages



Zetland: Growth of article listens over time



Audio newspaper in the car from Estadão



Platform wars? Apple's dominance over podcasting is being eroded by Spotify, which has invested \$500m in improving discovery and acquiring original content. It has doubled its market share in the last year in many countries¹⁸ and is looking to become the dominant platform for podcasting

¹⁶ <https://www.zdnet.com/article/podcast-market-booms-in-brazil/>

¹⁷ <https://www.theglobeandmail.com/inside-the-globe/article-new-to-the-globe-listen-to-articles-in-english-french-or-mandarin/>

¹⁸ Libsyn data for September 2019 shows 58% for Apple, 13% for Spotify (up from 7% a year previously)

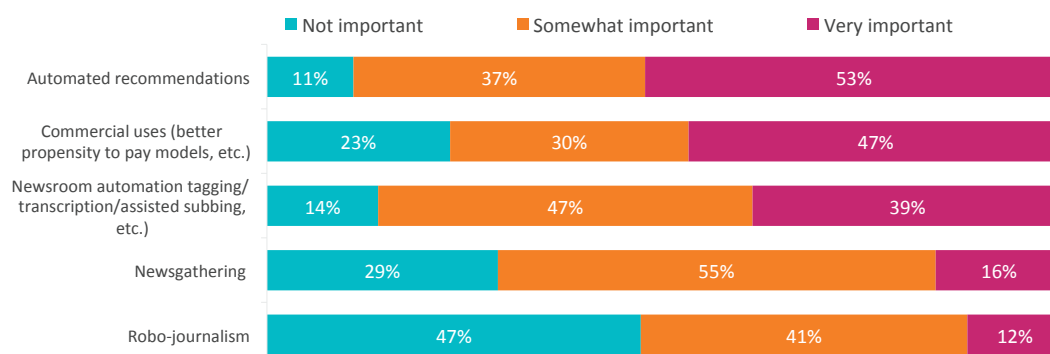
within a few years. But expect Apple to fight back this year, while podcast specialists like Luminary in the US, Sybel in France, and Podimo in Denmark and Germany, are all vying to become the 'Netflix of podcasting'.

1.6 Doubts Emerging over the Role of AI in the Newsroom

A recent report from the LSE revealed myriad ways that AI (or at least machine learning) is already being deployed in journalism, at the same time as highlighting the ethical challenges that lie ahead.¹⁹ The report set out the different ways that AI is being used in (1) newsgathering, (2) production (including different kinds of newsroom automation), and (3) distribution/recommendation.

In our digital leaders survey we can see that most focus this year will be on creating more effective recommendations (53% saying very important), followed by commercial uses such as using AI to target potential subscribers and optimise paywalls (47%), and ways of driving greater efficiency in the newsroom, such as using AI to assist subbing or improve the consistency of tagging (39%). Only a minority of publishers felt that robo-journalism (12%) or newsgathering (16%) would be important areas to explore this year.

Which newsroom uses of AI will be most important in 2020?



Q11. To what extent will the following uses of Artificial Intelligence (AI) be important to your company in 2020? N=218

Some publishers make a clear distinction between editorial and non-editorial uses of artificial intelligence. *The Times* (of London), for example, uses the slogan 'written by humans, curated by humans, distributed by robots' to help focus its efforts. This year it will be extending its AI-driven recommendation engine, James, from emails to a wider range of web and app-based recommendations. Publishers have started to experiment with electronic editing assistants such as Tansa and Grammarly to automate some subbing tasks:

At the moment it is not at the stage where it can do the whole job but it can certainly do 80% of the legwork.

Chris Duncan, MD Platform Partnerships, *The Times* and *Sunday Times*

Scandinavia-based publisher Schibsted has gone further, delegating some curation tasks to AI-driven algorithms, with semi-automated front pages for titles like *Aftenposten* and *VG*. The aim of its 'Curate Project' is to replicate the workflow of front-page editors to 'free up time for more

¹⁹ New Powers, New Responsibilities – a Global Survey of Journalism and Artificial Intelligence, LSE Polis <https://blogs.lse.ac.uk/polis/2019/11/18/new-powers-new-responsibilities/>

creative tasks'.²⁰ Though some respondents worry that AI could be used by unscrupulous owners to drive further job cuts, most were optimistic that it would ultimately benefit journalism.

It is a gift, offering us economic benefit and efficiency. It doesn't replace journalists. It allows journalists to return to their primary function of breaking stories, uncovering facts, and delivering the news.

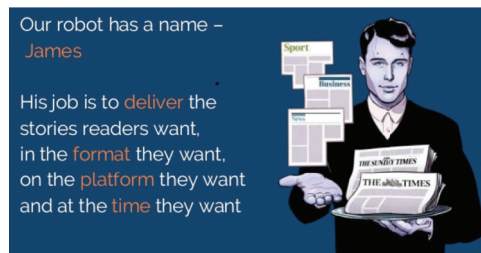
National newspaper editor, Canada

For others, AI is opening up new opportunities. The BBC has experimented with automated language translation and improved synthesised voice technology in developing its Japanese video service, though the live output is currently produced manually.²¹ News agencies are focused more on turning financial and sports data into automated stories, expanding the speed and range of their output. The BBC used similar techniques to publish 689 semi-automated local stories in just a few hours on election night (December 2019) while the *Guardian* published its first automated story on Australian election funding in 2019. News agencies and business publications like Bloomberg and the *Wall Street Journal* have been using AI to quickly produce stories on company earnings and are looking for other ways to drive commercial benefits of data at scale:

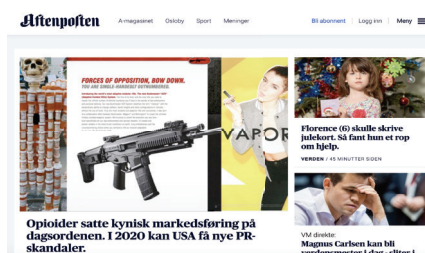
We are at the forefront of automating news stories for machine-driven trading. We are also an industry leader with our propensity paywall, that can adjust to the likelihood of a reader converting to a subscriber.

Edward Roussell, Chief Innovation Officer, *Wall Street Journal*

AI-driven recommendations from James (Times)



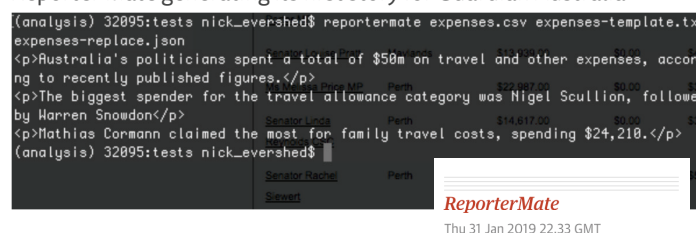
Semi-automated front pages – Schibsted



BBC Japanese Service – AI experiments



Reporter Mate generating its first story for Guardian Australia



Despite general optimism, there were also significant concerns revealed in our survey.

Smaller publishers worry that they could be left behind due to the complexity, expense, and scarcity of skills: 'We do not have the technical capacity or budget to cope with AI to the extent we would like,' says Esther Alonso Rodríguez, Marketing and Development Director at Eldiario in Spain.

²⁰ <https://schibsted.com/blog/machine-learning-recommend-content/>

²¹ <https://www.bbc.com/japanese>

Others fear that lack of understanding in the boardroom will lead to an over-estimation of the capabilities of AI today. 'It's great for transcription, and translation, but still hopeless at actually writing stories,' says a senior editor who has experimented with these technologies. 'This is like asking about the impact of spreadsheets. They are useful but don't really change the fundamentals.' Others warn that the industry should be careful about 'distracting itself with trends' when it should instead be aligning technology solutions to core strategy.

WHAT TO EXPECT IN 2020?

AI-driven fake news. 'AI has the potential to boost disinformation campaigns as the 2020 election cycle in the US ramps up,' warns a senior executive from one of the biggest and most respected national news brands. AI could make it easier to produce junk news in text, audio, and video and such potentially low-quality and misleading content masquerading as professionally produced news could further reduce trust in journalism.

Bigger focus, better reporting of AI. The application of AI and the implications for privacy and democracy will be a defining issue not just of 2020 but of the next decade. But many worry that the technology will run ahead of our ability to shine a light on the way these systems are being programmed or used. Our own research finds that most news reporting treats AI as a novelty and struggles to explain the more immediate and pressing implications.²² There are signs that this could change this year with more news organisations (Tortoise Media) making AI a pillar of their coverage.

1.7. Summary

This will be the year when journalism looks to regain relevance and confidence in a fragmented and uncertain world. Buffeted by economic and political pressures, media companies remain on the backfoot, but across the world we also see many positive examples of fearless journalism and business innovation.

The shift to reader payment, clearly signalled again our digital leaders' survey, is in full swing and will extend this year to countries as diverse as Spain, Hong Kong, and Argentina. Companies there will be hoping to emulate and learn from the success of large and small publishers in the US and Northern Europe who are focusing relentlessly on keeping readers/viewers happy and are beginning to talk about news as a 'growth business' again. But reader payment is unlikely to work for all and will require deep commitment over time as well as new skills and processes.

With more high-quality journalism disappearing behind registration barriers and paywalls, the democratic dangers may also become more apparent in the year ahead. The fear is that serious news consumption will be largely confined to elites who can afford to pay, while the bulk of the population pick up headlines and memes from social media or avoid the news altogether.

Our survey shows that some publishers are looking to tackle these deep-seated engagement problems through solutions journalism, events, and accessible formats like podcasts. More diverse newsrooms will also help to broaden the news agenda and modernise presentation. But gaining and keeping attention without compromising on quality (and trust) remains the key challenge for the news industry.

Against this background, artificial intelligence offers the possibility of more personal and relevant news services, as well as more efficient ways of packaging and distributing content. But platforms will need to play a role too – especially in helping publishers reach new and diverse audiences.

²² <https://reutersinstitute.politics.ox.ac.uk/our-research/industry-led-debate-how-uk-media-cover-artificial-intelligence>

In this regard, the growth of content licensing via the Facebook News tab and Apple News+ is an intriguing development that will be fascinating to watch, despite widespread industry cynicism. For Facebook in particular this initiative will be critical as it looks to win back trust from publishers.

More widely, publishers remain resentful about what they see as unfair competition from platforms and tech companies. With regulation looming, we're likely to see publishers pushing their rights harder than for many years, even as most of our respondents are sceptical that policymakers will actually help publishers, and as some platforms seem to be considering how important news actually is for their main products and services.

At the same time, the overwhelming mood from this year's survey is one of quiet determination not to be distracted by the latest innovations but to focus on delivering long-term value for audiences. There is no one path to success – and there will be many publishers that do not make it – but there is greater confidence now that good journalism can continue to flourish in a digital age.

2. Forward-Looking Essays

2.1. Building the Business We Want

Rasmus Kleis Nielsen

Publishers in 2020 will increasingly accept that building the business we want is more important than to rage, rage against the dying of the business that we had.

I take the confidence a clear majority of the digital leaders we have surveyed express in the future of their company as reflecting a determination to make digital work for their editorial ambitions and the business that powers those ambitions (See page 9).

I take the fact that less than half of our respondents are confident in the future prospects of journalism more generally as a realistic recognition that business as usual is over and that many won't make the transition from past to future.

It has been clear for some time that the large and lucrative mass media news business is fading as its ageing and dwindling audience face the close of day.

I expect global news industry revenues to continue to decline for at least another decade as profitable print products die out with their readers, broadcast is disrupted, and digital growth, real as it is, in most cases will not deliver the same revenues or profit margins.

But a shrinking industry is not the same as a dying industry. Sometimes, a sense of loss and the sheer scale of the legacy businesses fading away can blind us to important, encouraging signs that a future digital business of news is developing in a very challenging and very competitive media environment.

For those more interested in the business we want than the business we had, it is increasingly clear that a smaller, leaner, sustainable digital media news business is emerging, built across advertising revenues, reader revenues, and other sources of income.

Publishers as different as AMedia, Brut, *Dagens Nyheter*, *Dennik N*, *El Diario*, the *Lincolnite*, *MediaPart*, *VG*, and many more are examples of how publishers who combine editorial ideals with hard-nosed commercial realism are successfully developing their own digital journalism and the business behind it.

None of this is easy.

Publishers used to capture a large share of people's attention, and consequently a large share of advertising. Online, news captures just a few percent of people's attention,²³ and faced with large platform competitors who offer advertisers low prices, high reach, and precise targeting, publishers thus draw only a few percent of advertising. But with the global digital ad spend estimated to reach \$385bn in 2020,²⁴ a few percent is still billions of dollars.

²³ <https://press.princeton.edu/books/hardcover/9780691159263/the-internet-trap>

²⁴ <https://www.emarketer.com/content/global-digital-ad-spending-2019>

Publishers used to be able to sell bundled products that solved all sorts of different problems for all sorts of different people, but online, many of these problems are solved more efficiently by others, and faced with near-limitless competition for attention and the fact that the majority of major media still offer news free at the point of consumption,²⁵ it is still only a minority who are willing to pay for online news,²⁶ and most will only subscribe to one or two publications. But even this minority is on track to generate billions of dollars.

Legacy revenues and profits reflected the news media's dominant position in an offline media environment where audiences had low choice and publishers had high market power over advertisers.

Digital revenues and profits will reflect the news media's much more marginal position in an online media environment where audiences have high choice and publishers have little market power over advertisers.

This is a much tougher market. But it is not an impossible one for those who offer distinct, valuable journalism and maintain a lean and nimble operation. And the – always precarious, sometimes piecemeal, and rarely linear – success of a growing number of news media in this environment is a lot more encouraging than the asset stripping, cost-cutting and consolidation, and continued reliance on print products in terminal decline that we see in much of the legacy industry (or than the clickbait and desperate 'pivots' to the latest fad that some of the more rudderless digital-born sites resort to).

Many trying to make the transition from offline to online will not succeed. Often, those trying to build something new will fail. Some of those who succeed will still fall short of their hopes and aspirations. Very few will generate anything like the revenues or profits we saw in the past.

But that was then. This is now. A younger generation of journalists, media leaders, and – most importantly – members of the public won't be served by fond reminiscences about the past or by those who burn and rage against the present, and the future of the news media that we all rely on won't be secured by sentimentalism or by short-term thinking focusing on cost-cutting. It will require a long-term bet on reorganising to focus on the future. We know this is hard. But we also know it is possible. And if we value independent professional journalism and believe in its continued purpose and importance, we will also have to develop businesses that will sustain it at scale – in most countries, realistically, nothing else will, not politicians, not philanthropy, and not platform companies.

Those fighting rearguard battles will point out that the new digital businesses of news we see emerging won't replace what we had. What they say is true, but it is also irrelevant.

Nothing will replace what we had, and if we continue to define the problem in those terms, we will continue to fail. What matters is that these businesses provide the foundation of what we will be, the resources with which various vanguards will define the future of digital journalism.

²⁵ https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2019-05/Paymodels_for_Online_News_FINAL_1.pdf

²⁶ <http://www.digitalnewsreport.org/survey/2019/paying-for-news-and-the-limits-of-subscription/>

2.2. Journalism under Fire

Meera Selva

POLITICIANS' ATTACK ON JOURNALISM

Journalists in 2020 will have to talk direct to their audience, to convince their viewers and readers that they are impartial, trustworthy, and deserving of support when politicians attack.²⁷ The majority of the digital leaders surveyed say that news media should do more to call out misleading statements and half-truths by politicians (See page 12). But to be able to do so effectively, they have to protect their independence and their connection with the public.

Governments, either tetchy or empowered, feel entitled to attack journalists as never before. Taking their cue from the President of the United States, political leaders are lashing out at journalists, with the assumption that they have the support of the public in doing so.

Journalists find themselves being trolled by activists from all sides of the political spectrum, subject to online attacks and accusations of bias and partisanship. Journalists, particularly women, must routinely cope with being abused and having their work distorted online.

And these attacks will go mainstream as more and more leaders, emboldened by Donald Trump, but also by Jair Bolsonaro in Brazil, Narendra Modi in India, and several governments in the European Union and across the world, normalise a culture of criticising and undermining journalists on social media. In Europe journalists warn of particularly virulent levels of trolling from far-right groups, who combine attacks on journalism with concerted misinformation campaigns.

COVERING PROTESTS AND POLARISED POLITICS

The role of journalists covering large-scale protests and demonstrations will also grow more complicated, as they become seen not as neutral observers but either participants and activists themselves, or somehow allied to the authorities the protestors are demonstrating against.

Journalists have been pepper-sprayed, teargassed, and detained by police in Hong Kong and are likely to continue to come under assault there as protests continue into 2020. The protestors, while largely supportive, are also suspicious that journalists are trying to reveal their identities to the authorities. In Bolivia they are under attack from the public and from police: a trend that will be seen more countries.

Even in long-standing liberal democracies, journalists are under attack from all sides of the political spectrum, with politicians and activists questioning the impartiality even of broadly trusted news media like public service broadcasters such as the BBC and Japan's NHK, and populists of different persuasions painting 'the media' as part of an out-of-touch elite establishment.

AUTHORITIES LIMITING FREEDOM OF EXPRESSION

A raft of legislation ostensibly aimed at curbing misinformation and hate speech is likely to add an extra burden on journalists already battling vexatious defamation and libel suits. In the last year Russia and Singapore have both passed laws, ostensibly aimed at curbing misinformation, that put pressure on platform companies to monitor posts, and several other countries including Nigeria are likely to follow suit with similar laws this year.

²⁷ This essay, on threats facing journalists in 2020, draws on questions sent in December 2020 to the current set of RISJ fellows and summer school participants, and a forthcoming report to be published by the Reuters Institute.

There will also be a battle for access to public information and data. Journalists are braced for a slow erosion of Freedom of Information laws, undermining their access to information that should be widely available. This is likely to be accompanied by a tightening up of national security legislation, making it easier for governments to deem materials too sensitive to be released into the public domain.

But the biggest threat of all is silence. Governments around the world have begun hitting the mute button when the noise gets too loud, shutting off the internet when protests get too loud.

India dominates internet shutdowns. Kashmir will have been without the internet for 150 days as 2020 begins, and the government has shown it is willing to shut off the internet even in the capital city of Delhi amid protests against the new Citizenship Amendment Act and a proposed National Register of Citizens.

Meanwhile journalists in several sub-Saharan African countries are finding that new regimes can be as willing as the old to try to silence the national conversation. In Sudan, president Omar al Bashir stepped down after wide-scale protests over the price of bread and fuel, but the military regime that replaced him shut the internet down to curtail the pro-democracy protests that continued even after the regime change, and may do again. Zimbabwe's new president Emmerson Mnangagwa shut down the internet after protests and has signalled he is as willing to use this particular form of cyber censorship as his predecessor Robert Mugabe.

Even in a long-standing liberal democracy like the UK, police have shut down wi-fi access in parts of the London Underground in an attempt to disrupt action by climate change protestors, marking a significant shift in thinking.

These internet shutdowns silence the social media platforms many people use to organise and receive news and which are also vital tools for journalists themselves to collect and disseminate information.

JOURNALISTS' RESPONSE

Journalists are responding to these threats with debates and soul-searching on how to report on populist movements, when to give the leaders a platform to speak, and when they should be ignored. They believe the key to survival is to build trust with audiences and to explain to the public how journalism works.

Newsrooms will have to learn how to better support their reporters, who routinely face harassment and threats online and in real life, accepting the toll their work takes on journalists' mental health and personal lives.

Media organisations must find a way to defend themselves, their principles, and their distribution channels, whether that be social media platforms, airways, or news sellers. It is no longer enough to say that the reporting will speak for itself. Journalism must be protected, defended, and strengthened in 2020 at every level if it is to continue to hold power to account. Journalists must build, maintain, and strengthen their connection with the public to be able to do their job.

2.3. Trust will Get Worse Before it Gets Better

Richard Fletcher

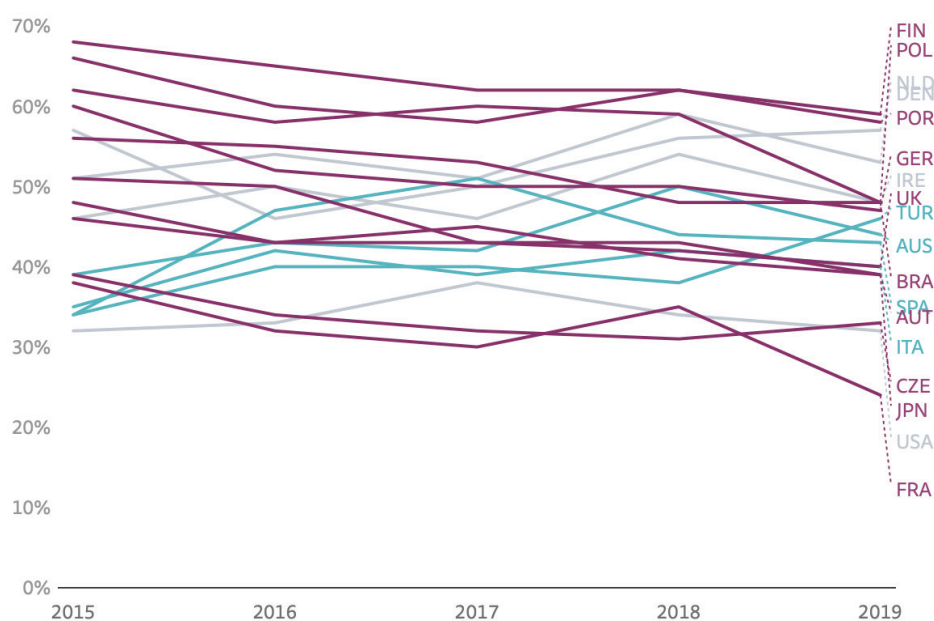
Journalists in 2020 will have to confront the possibility that trust in the news media will shrink in the coming years. This prediction does not reflect my own assessment of how the news media is currently performing, nor my views about the broader societal context within which journalism operates. Rather, it is simply based on the observation that trust in the news has fallen in most countries since 2015, and within our community there's no real consensus on why this has happened or what can be done about it. As such, it is difficult to imagine that trend being reversed. Thus, while the majority of the digital leaders surveyed are confident about their company's future prospects faced with technological and business disruptions (See page 9), the social and political disruptions of eroding public trust remains a challenge for many news media.

ERODING TRUST

According to data from the Reuters Institute *Digital News Report* survey,²⁸ national levels of trust in the news media have fallen by an average of five percentage points across 18 countries since 2015. Of course, if we take a closer look at the data things get more complicated. In 10 of the 18 countries where we have data going back five years, trust has indeed declined, but in the other eight it has either increased or stayed the same (see chart). Furthermore, even in those countries where trust has fallen, the decline in some ways looks smaller than we might have inferred from the crisis narrative that permeates many discussions.

Proportion that trust most news most of the time (2015–2019)

Selected countries



That being said, small year-on-year declines have in some cases compounded to produce sizeable drops of around ten percentage points since 2015. In Germany, the proportion that trust most news most of the time has fallen from 60% in 2015 to 47% in 2019. In Finland, the figure has dropped from 68% to 59%, and in the UK there has been a fall from 51% to 40%. The chart also

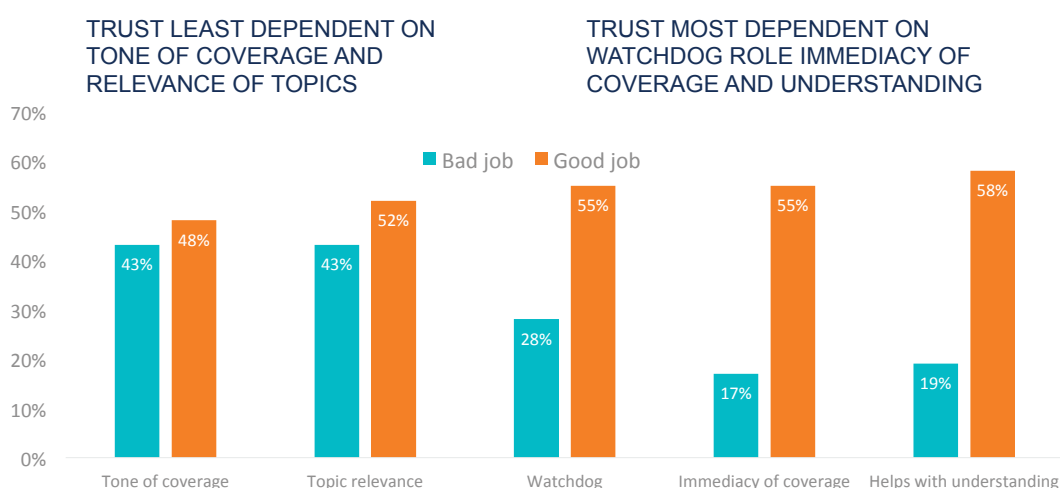
²⁸ <http://www.digitalnewsreport.org/>

reveals that those countries that have experienced declines (indicated with red lines) are typically those that started off with relatively high levels of trust. Of the 11 countries where trust was over 40% in 2015, eight have seen statistically significant declines in trust, with the figures stable in the remaining three. The only countries that have seen an increase in the last five years are those that had relatively low levels of trust to begin with. When it comes to public trust in the news media, it seems things tend to get worse before they start to get better.

What drives the erosion of trust? Can anything be done to reverse the downward trends? We should keep in mind that trust in the news media is not entirely in the hands of journalists and news organisations. Many people do not have strong opinions about the news media, and other cross-national studies have shown that trust in the news media is increasingly tied to levels of trust in politics.²⁹ If trust in political institutions falls, then trust in the news media is dragged down with it. And if the political situation becomes more polarised, even the best news coverage can come to be seen as biased by large sections of the population.³⁰ People's perception of journalism and the news media is thus deeply influenced by their perception of other institutions, and by cues provided by politicians and other elites – politicians and elites who in some countries increasingly aggressively and explicitly attack independent news media and question journalists' integrity and motives.

What can be done to increase trust? In terms of what journalism and news organisations can do, one starting point might be to look at what people with different levels of trust in the news media think it currently does well (and, conversely, what they think it does poorly). As I have written previously,³¹ people who think that the news media does a bad job of keeping them updated with current events, fails to help them properly understand the news, or is unable to monitor and scrutinise the powerful, are much less likely to say they trust the news (see the next chart). Whether or not the stories chosen by the news media feel personally relevant to people, and whether or not the news media adopts a positive or negative tone, seems to be less important.

Proportion that trusts the news by attitudes towards the news (2019)



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

²⁹ <https://journals.sagepub.com/doi/full/10.1177/1940161217740695>

³⁰ <https://reutersinstitute.politics.ox.ac.uk/risj-review/bias-bullshit-and-lies-audience-perspectives-low-trust-media>

³¹ <http://www.digitalnewsreport.org/survey/2019/what-do-people-think-about-the-news-media/>

What I think this shows is that trust is not rooted in different ideas about what the news *should be*, but in how well it meets widely accepted goals. This is both an opportunity and a challenge for journalism. For the most part, people accept that some topics are inherently newsworthy and some are not, and as a result, a lot of coverage tends to be negative. But they struggle to trust news media they believe are performing poorly when it comes to reporting in a timely manner, helping them understand the world around them, and holding power to account. In other words, people with low trust in the news media don't want it to be fundamentally different – they just want it to be better.

2.4. Handling Inter-Generational Tensions in News Media

Lucy Kueng

News media in 2020 will have to rise to the challenge of inter-generational tensions in their own organisations, differences between the values and priorities of many younger professionals, and an often older generation of leaders in news. A clear majority of the digital leaders we have surveyed are confident their news organisation can attract and retain the editorial talent they need, but most are much more worried about their ability to attract commercial, product, technology, and data talent, and many are aware of the challenge of retaining and developing talent of a younger generation with somewhat different values and priorities (See page 18). As one of my interviewees in my ongoing research said of younger colleagues:

Their loyalty is towards themselves and their values. I know this is obvious, but when you see it in your own company it's like 'wow, this is not just some fancy article, it's our employees'.

In every research project there tends to be one topic that surfaces unexpectedly and repeatedly.³² In my last project 'Going Digital: A Roadmap for Organisational Transformation', it was burnout.³³ In my current project on the people dimension of going digital, it is inter-generational tension, an issue that cuts across discussions on culture, on leadership, on talent, and on strategy. This short essay skims the contours of this issue and provides suggestions for how to tackle it.

MAPPING THE PROBLEM

There's a temptation to dismiss this as 'the millennial thing', and it certainly is connected with younger generations, but things are more nuanced: many of those who raised this as a problem are millennials themselves.³⁴ So which group is causing the tension? This is not easy to define, as this extract from a focus group shows:

'What do we want to call them?'
'I don't know, entrant or emerging talent?'
'But they're not even emerging. They're like 35, 36, 37. They're running things.'
'Younger talent?'
'Just call them 25- to 36-year-olds?'
'25 to 35-ish.'
'I think it's worth naming it, because there is a thing happening.'
'There is a thing, but if we call them millennials, automatically there's negative connotations.'

The tension arises because a growing group of staff, predominantly at lower levels but in some cases rising up fast, have a very different value orientation to those at the top. Their attitudes and expectations are at odds with established accepted processes and practices. The HR director of large media conglomerate describes how this plays out:

They're blunt when they start ... 'I'm going to stay for one or two years.' And then, of course they want to get the most out of those 24 months ... 'I want to learn, develop myself ... maximise the speed of experience. I want to have a good time, ... I want to meet interesting people, I want to work in fun projects. I don't want to be dragged into internal politics because that's not really relevant for me.'

³² This essay draws on insights from 'Hearts and Minds – the People Dimension of Digital Transformation' which will be published by the Reuters Institute in Spring 2020.

³³ <https://reutersinstitute.politics.ox.ac.uk/our-research/going-digital-roadmap-organisational-transformation>

³⁴ Gen Y-ers or millennials are those born between 1981 and 1996.

On a day-to-day level a major source of friction is simply the amount of ongoing feedback this group want ('the unending quest for credit' as one interviewee put it). For leaders accustomed to doing things differently, this is disruptive when life is busy, and can be especially so if that feedback isn't positive:

They will absolutely ask for it ... but when they hear it, they really struggle to digest it. It's too painful ... they only want positive feedback and struggle with the negative.

'I'M SO SICK AND TIRED OF HEARING, "OH, YOU'RE A MILLENNIAL"'

How does this look from the other side? This group is frustrated that their needs, which stem from deeply held beliefs, are not being taken seriously:

They call this generation snowflakes ... leaders think if something upsets us it's because ... we grew up in cotton wool. That's not the case. It's just that we're a lot more aware of our surroundings, and there are just things that we care about.

It's important to bear in mind also that this group's experience of work, and expectations of what that work can supply in terms of security and lifestyle, are profoundly different to those of older colleagues:

For the most part they graduated into the Great Financial Crisis and have had a very unorthodox career, skipping around every 1.5 to two years ... they've either been laid off or seen layoffs, they've seen how brutal this industry is ... a sense of uncertainty hangs over them. ... they're in a house-share in their early 30s, and thinking, is this it? How do I get a bigger piece?

In this context, feedback is about much more than simply evaluating work done. It's about the calibre of the relationship between the leader and follower:

It can't just be a relationship where you use up ten hours of someone's time, pay them very little, and give them no job security ... Why wouldn't you want to know if a person wants a one-on-one conversation? Why wouldn't you want to know what they have to say?

'WE HAVE TO DELIVER ON AN ENTIRELY DIFFERENT SET OF EXPECTATIONS'

Resolving this tension involves a set of shifts and adaptations to core processes. At the top of the list of things leaders can do and organisations can provide are:

- A coaching and mentoring style of leadership that majors on feedback.
- Opportunities for those at the bottom to have access to those at the top. They need to feel listened to and that they have an opportunity to make an impact.
- Checking the calibre of inter-personal relations in general and the choreography of your most important meetings specifically. Make sure that all voices can be heard, and that decision-making is as transparent and inclusive as feasible.
- Assume that talent in this category will stay for three years maximum. Accelerate their training and move them onto interesting projects fast.

The past decade's (entirely understandable) preoccupation with digitalising our workplaces and securing a viable business model may well have blinded us to an equally seismic shift: the

emergence of a markedly different value system shared by a growing group of organisation members. This is an emerging issue and a complex one that needs deeper research. It is not simply about differences in age – in fact all those cited in this essay are millennials. Underlying this are crucial differences in the strength of commitment to personal values and to self-actualisation needs, in preferences for the tenor and calibre of relationships with co-workers, in economic prospects, and in tolerance for organisational dysfunctionalities. Resolving these tensions will be central to attracting, retaining, and unleashing the talent that will be so central to building a sustainable future for news media in 2020.

2.5. Making Readers Pay

Eduardo Suárez

Publishers trying to shift to reader revenue models in 2020 have to realise that only those with a relentless focus on their customers will succeed. It is one thing to say that reader revenue will be the most important income stream going forward, as half of the digital leaders we surveyed do (See page 10). It is another to, in fact, make reader revenue work, especially for publishers who have offered their online journalism for free for years. The shift will be tough for companies whose digital revenue comes mostly from advertising and for legacy news organisations with a culture evolved for a world that no longer exists.

THREE THINGS TO DO BEFORE LAUNCHING A PAYWALL

You should do at least three things before putting your content behind a paywall.

The first one is to integrate your company around the project. This requires involving people from editorial, technology, marketing, and product, and eventually developing connections that allow better collaboration between the newsroom and the business side.

The second is to learn to tell the story of your company: who you are, what your product is, and why it is so important right now. This appeal should be crafted carefully. It must take into account the mission of your organisation as well as its ownership and its history. Few news brands have done this more systematically than the *Guardian*.³⁵ The messages at the bottom of its articles are long, conversational, and customised by topic and geography. They are designed to answer frequent questions from their readers before asking them to contribute.

The third thing you should do is to invest as much as you can in your digital product. Today audiences are familiar with digital platforms and they won't accept poor user experience. They'll expect professional audio and frictionless payments. Posting your print product online just before midnight won't be enough.

Then you should adjust your value proposition to the needs of your most loyal customers (and others like them). This will not be an easy task because customers are not homogeneous. Their consumption patterns may be all over the map. Data (not gut instinct) should be your guide. You must remember that quality means different things at different moments to different people. Each channel and genre requires a different language and different skills.

WHAT IS THE JOB YOU DO FOR YOUR AUDIENCE?

As you rethink your value proposition, it may be useful to use Professor Clayton Christensen's framework and consider which jobs your audience hires you to do.³⁶ A single printed newspaper used to do many of those jobs. The most successful news brands have managed to address them much more efficiently with different products in the digital age.

Some of those jobs are just functional – getting the latest news on a particular topic. Others have social and emotional dimensions. *The Economist* is a great example. It saves you time by offering brief explainers and telling you what's important. Reading the magazine, however, also gives you a certain status and a sense of achievement. The package is bigger than the sum of its parts.

³⁵ <https://www.journalism.co.uk/news/five-lessons-from-the-guardian-s-membership-strategy-three-years-on/s2/a730347/>

³⁶ <https://niemanreports.org/books/be-the-disruptor/>

In a world dominated by endless news feeds, finite editions are having a comeback. Editions are a great way to foster loyalty among subscribers and recreate the news habits of the past. They come in many flavours – podcasts, niche newsletters, a printed magazine. All of them are finishable and try to keep one of the oldest promises in journalism: being a trusted filter on the world.

The revival of editions is aligned with our research.³⁷ According to figures from the *Digital News Report*, only 17% of the public access the news more than five times a day. Around 48% are what we call ‘daily briefers’ – people who typically access the news once or a few times a day.

Those readers won’t spend an hour diving into your printed edition. But some may read a morning newsletter or listen to a news podcast during their daily commute. They’ll find explainers even more valuable in a world increasingly complex and unstable. Some may value niche products about topics they care about – *The Times Crime Club* newsletter has a 70% open rate.

A subscription is not a one-time sale but a long-term proposition. Building a strong relationship with your audience is essential to succeed. News brands such as Tortoise and the *New York Times* engage their readers in their reporting process. Spanish digital-born outlet eldiario.es has created a button for readers to report typos and factual mistakes.³⁸

EVERYONE NEEDS TO FIND THEIR OWN WAY

Every publisher must find its own reader revenue model. But differences between memberships and subscriptions are starting to blur. *The Times* has introduced registration as a way to open up a side door in a very hard paywall. Despite its focus on memberships and donations, the *Guardian* is selling subscriptions to its print products and to its mobile apps.

According to our figures, freemium models and metered paywalls are equally popular among newspapers and magazines across seven different markets.³⁹ Whatever your model, you should get your subscribers to use your product as soon as possible. Sports outlet The Athletic has noticed that people who engage with one of its podcasts during the free seven-day trial period are much more likely to buy an annual subscription to the site.

A shift to reader revenue models will be tough for every publisher and it may not produce results in the short term. According to the *Digital News Report*, most people are not willing to pay for news, and a wide variety of quality journalism continues to be available for free.

However, publishers should be patient. This race is a marathon, not a sprint. They will succeed if they look carefully at the behaviour of its most loyal customers and build products adapted to their needs. Reader revenue models are full of promise for those who do journalism worth paying for as long as they are willing to change their approach to editorial, marketing, and product.

³⁷ https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2019-01/Nielsen_and_Selva_FINAL_o.pdf

³⁸ https://www.eldiario.es/redaccion/errata-contenido-Reportalo-podamos-corregirlo_6_897720233.html

³⁹ <http://www.digitalnewsreport.org/publications/2019/pay-models-2019-update/>

Postscript

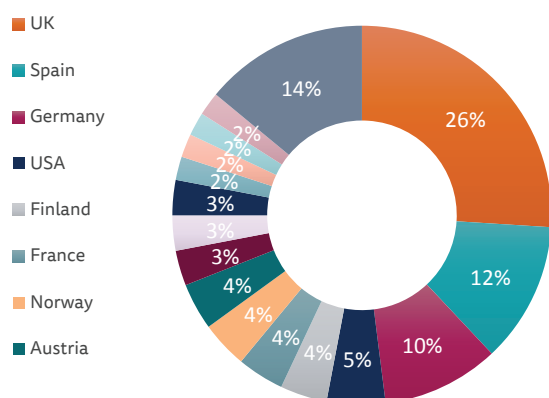
Once again, thanks to all those who have contributed to this year's predictions and to those who completed our digital leaders' survey. We'd be delighted to hear from you if you have comments or suggestions for next year at:

reuters.institute@politics.ox.ac.uk

Survey Methodology

233 people completed a closed survey in December 2019. Participants, drawn from 32 countries, were selected because they held senior positions (editorial, commercial, or product) in traditional or digital-born publishing companies and were responsible for aspects of digital or wider media strategy. The results reflect this strategic sample of select industry leaders, not a representative sample.

Survey Country Mix (%)



Survey Job Titles (No.)



Base = 233 Digital Leaders surveyed, 32 countries, 29 November–31 December 2019

Typical job titles included Editor in Chief/Executive Editor, CEO, Head of Digital, Head of Innovation, Chief Product Officer, Director of Multimedia, etc. Just over half of participants were from organisations with a print background (54%), around a quarter (26%) represented commercial or public service broadcasters, more than one in ten came from digital-born media (14%), and a further 6% from B2B companies or news agencies. 32 countries were represented in the survey including the US, Australia, Kenya, South Africa, Mexico, Argentina, and Japan, but the majority came from European countries such as the UK, Germany, Spain, France, Austria, Poland, Finland, Norway, and Denmark.

Participants filled out an online survey with specific questions around strategic digital intent in 2020. Around 95% answered most questions, although response rates vary. The majority (80%) contributed comments and ideas in open questions and some of these are quoted with permission in this document.

RISJ DIGITAL NEWS PROJECT PUBLICATIONS

News Podcasts and the Opportunities for Publishers
Nic Newman and Nathan Gallo

Digital News Report 2019
Nic Newman, Richard Fletcher, Antonis Kalogeropoulos, and Rasmus Kleis Nielsen

How Brexit Referendum Voters Use News
Richard Fletcher, Meera Selva

Case Studies in Collaborative Local Journalism
Joy Jenkins and Lucas Graves

What Do News Readers Really Want To Read About?
How Relevance Works For News Audiences
Kim Christian Schrøder

Coming of Age: Developments in Digital-Born News Media in Europe
Tom Nicholls, Nabeelah Shabbir, Lucas Graves, and Rasmus Kleis Nielsen

The Future of Voice and the Implications for News
Nic Newman

Private Sector News, Social Media Distribution, and Algorithm Change
Alessio Cornia, Annika Sehl, David A. L. Levy, and Rasmus Kleis Nielsen

Public Service News and Social Media
Annika Sehl, Alessio Cornia, and Rasmus Kleis Nielsen

Going Digital: A Roadmap for Organisational Transformation
Lucy Kueng

FORTHCOMING PUBLICATIONS

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