Brand and trust in a fragmented news environment

Qualitative research report

Prepared for the Reuters Institute for the Study of Journalism

With the support of Google's Digital News Initiative[1]

[1] This report is part of The Digital News Project, a research series supported by Google's Digital News Initiative (DNI). The series builds on the success of the Reuters Institute Digital News Report as the world's largest comparative international survey of changing news habits, and will continue to track the transition of the news industry towards an increasingly digital and multi-platform future.

KANTAR MEDIA

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Executive summary

1.1 Background

The Reuters Institute commissioned Kantar Media to conduct qualitative research into the attitudes and behaviours of today's news consumers. Research was required to inform the *Digital News Report* and to deliver rich illustrative material to bring findings to life.

The qualitative study explored issues of brand and trust in an increasingly fragmented news environment, and specifically within distributed environments such as aggregators and social media. The project covered 4 countries – Germany, Spain, the UK and United States – with a series of pre-tasked discussion groups allowing detailed investigation of people's digital news habits and preferences. Fieldwork in each nation was split between groups of younger and older participants, encompassing digital users of various broadcast, print, and digital-born news brands. The research was conducted in February 2016.

1.2 Summary of key findings

Defining trust

The Reuters Institute's *Digital News Report 2015* showed that consumers' trust in news sources that they used was greater than their general levels of trust in news media.[2] With strong indications of a link between trust and news sources used, this qualitative study provided detailed exploration of consumers' understanding of trust – both in general and in news. The focus on trust informed the selection of countries covered by the qualitative research, with Germany and the UK traditionally displaying high levels of trust in news media, and Spain and the United States having the lowest levels of trust.

'Trust' is widely understood as a belief in someone or something, which is nurtured through positive experiences

[2] Reuters Institute for the Study of Journalism, Digital News Report 2015, pp.57-58

To provide context for exploration of trust in news content, the research initially investigated what trust meant to participants in general. Almost all of them found it easier to relate to trust on a human rather than institutional level. Drawing on examples from their everyday lives and interactions with others, trust was widely associated with people being reliable and consistent. Conversely, trust could be undermined where human fallibility produced disappointing experiences and undermined belief.

Trust in institutions is bolstered by positive experiences, yet is readily eroded by scandals and perceived vested interests

With trust most easily understood on a human level, the vast majority of participants placed greatest trust in institutions that they had directly engaged with. For example, trust was greatest in doctors and teachers, who were widely encountered and experienced through individuals rather than 'faceless institutions'.

By contrast, trust was generally lowest in government, which participants were less likely to have personally interacted with. Moreover, their trust in specific governments varied in relation to whether or not they reflected their political persuasions, with governments also widely associated with vested interests. Trust in government was markedly lower in Spain and the United States, owing to political instability and perceived corruption in the former, and a general mistrust of the role of government and acute political polarisation in the latter.

The media achieved a mid-level of trust across the four countries covered in the research. Most participants recognised the positive role of the media in holding other institutions to account, yet this was somewhat offset by concerns regarding commercial interests and often sensationalist reporting. Trust in the media was generally lowest in the UK in the wake of recent high-profile scandals.

News and platforms

Traditional and digital platforms fit into different routines and help people engage with news stories in different ways

The research explored people's use of and attitudes towards a variety of traditional (e.g. TV, print newspapers) and digital (e.g. websites, apps, social media and aggregators) news platforms. Regardless of their engagement with technology, the vast majority of participants highlighted clear roles for traditional and digital formats. However, reflecting the broader trends charted by the Reuters Institute's *Digital News Report*, most participants observed a continued migration from traditional to digital news platforms. In particular, they highlighted the role of smartphones in fuelling their digital news consumption, with sources readily accessed regardless of the time of day or location.

TV news is valued for providing an effortless, curated experience and a direct visual connection with unfolding events

The majority of participants, and particularly the older and less tech engaged, highly valued TV news. They appreciated the rich visual experience, which allowed them to witness developing stories. TV was also seen as an effortless option, with content selected and served to viewers. In addition, rolling 24-hour coverage meant that news was always available, with content fuelling conversations with fellow viewers.

Nonetheless, participants also identified relative shortcomings of TV news, with bulletins seen to offer less detail than predominantly text-based formats. They also highlighted the often repetitive nature of TV news, with content items frequently repeated across bulletins. In addition, TV news offered a less personalised service than online alternatives, and specific brands were often associated with political or commercial biases – especially in Spain and the United States.

Print newspapers deliver detailed and immersive coverage, with the written word conveying authority

Reflecting TV, print newspapers were most – if certainly not exclusively – appreciated by the older and less tech engaged. They highlighted the rich detail and context provided by newspapers, and the freedom to choose what to read at their own pace. Newspapers were widely associated with reading in quiet time, free from distractions. Indeed, several of the younger participants highly valued print newspapers for offering a break from ever-greater usage of and dependency on connected devices.

The most widely cited shortcoming of newspapers was that they delivered 'yesterday's news' and were not as up to date as digital alternatives. Newspapers were also seen to require greater effort to get hold of a copy, and were associated with higher costs than ostensibly free online alternatives. In the UK, in particular, newspapers were strongly associated with political and commercial biases, with several participants doubting their objectivity.

News websites offer the 'best of both worlds', blending the detail of print with the visuals of TV

The majority of participants had a go-to online news service that acted as a 'hub' for keeping them abreast of unfolding events. Whether accessed via websites or apps (which were increasingly favoured by the younger) they had a key role in providing truly up-to-the-minute coverage. For the more avid news followers, online services stood apart in enabling efficient comparisons across different brands and perspectives, especially where serious and complex stories were followed.

In terms of relative weaknesses, the wealth of information contained on online services actually presented problems for some people. The older and less tech engaged, in particular, often cited difficulties in navigating interfaces and choosing content from vast selections. Among the plethora of content available, several participants expressed frustrations about unnecessary (or certainly less interesting or relevant) information and an influx of clickbait that could undermine serious news credentials.

Social media opens up news to new audiences, while offering highly tailored experiences

Social media proved to be the most polarising news platform, with outlooks contrasting between younger and older participants. Most described passively consuming news on social media, where they learned about breaking stories through comments from friends and other contacts. For several younger and less avid news followers, this often emerged as a predominant means of keeping up to date with news stories. At the opposite end of the spectrum, several more ardent news consumers valued the tailored offer of social media, where specific brands and journalists could be followed, and stories commented on and discussed with others.

Despite the notable positives, most people had concerns regarding the accuracy of news content on social media and the often-heated debate generated. In particular, where news stories were mentioned by a personal contact, rather than received via a recognised news brand, further verification was typically required by visiting other sources. Some participants also had reservations about the personal disclosure involved in discussing news on social media, and the broader use of their personal data where brands were 'liked' or followed. Concerns regarding data privacy were most evident in Germany and, to a lesser extent, among older participants across the countries covered by the research.

Perceptions and role of brands

Consumers principally perceive news brands in relation to their platforms of origin

When considering the abundance of brands in the digital news landscape, participants mainly associated them with their platforms of origin (e.g. print, TV, radio, online). Nonetheless, they also readily appreciated that traditional broadcast- and print-born brands had offers spanning various formats.

In the UK, participants further segmented print-born brands in relation to their relative focuses on serious ('broadsheets') or entertaining ('tabloids') news content and reporting. Participants in the UK and the United States – and particularly the older – were most likely to further distinguish print-born brands in relation to political leanings, ranging from socially liberal to conservative. Those in the United States extended the political classification to major TV news brands with, for example, Fox News and NBC News poles apart in their political stances.

Across all the countries covered by the research, younger and more tech-engaged participants displayed more nuanced understanding of digital-native brands. For example, they were most able to split out digital-born brands into social media and aggregators, and also in relation to content focuses and brand personalities (e.g. lighter tone and entertainment focus, etc.).

Most people use a repertoire of brands to meet their news needs

It was clear that, among a research sample of digital news users, people were drawing on a variety of news brands to meet their multifaceted news needs. Their brand choices typically varied in relation to different stages of evolving news stories, and in line with different categories of news content.

The vast majority of participants tended to have a preferred source for initial awareness of news stories. Almost all gravitated towards online sources to learn about news stories, with the older likely to have their favoured website hubs and the younger increasingly becoming aware of stories via social media. Where websites were consulted, these were often broadcaster sites that were valued for providing factual overview, or internet company homepages that delivered summaries of key headlines and information.

Where interest in a story is piqued, many seek out additional news sources to immerse further. At this point, many people default to trusted and favoured brands that share their worldviews. In addition, the more avid news consumers highlighted the value in triangulating perspectives from across a range of brands, to better understand more complex and serious stories and, ultimately, to get closer to the 'truth'.

Trust in news

As mentioned earlier, exploring the foundations of trust in news was a key objective for this study amidst strong suggestions that trust influences people's choices of news sources. The research examined all aspects of consumers' trust in news media, ranging from their perceptions of news content through to the role of news organisations in inspiring trust.

Consumers' trust in news is complex and derived from their consideration of news content and news organisations, and from their engagement with a plurality of sources

Building upon the earlier exploration of participants' understanding of trust, the research drilled down into the fundamentals of trust in news. Participants identified a wide array of factors underpinning trust in news, ranging from how accurate and balanced *news content* was perceived to be, through to the experience and expertise, and motivations, of the *news organisations* delivering content.

Trust in news is most readily associated with news content and, in particular, perceptions of its accuracy, impartiality, and tonality

Just as people see facts and information as the basic building blocks of news, they perceive the accuracy of such material as fundamental to the trust ultimately placed in news output. Trusted news content should be transparent, thoroughly researched and checked, with failings in this area severely undermining people's trust in the final product delivered.

Participants also highlighted the relationship between trust, and news content that was seen to be impartial and balanced. While many gravitated towards news sources that reflected their worldviews, these were understood to adopt stances based on balanced coverage of the facts underpinning stories. Editorial responsibility was important in delivering impartial coverage, with any indications of sensationalist skews and the influence of vested interests likely to undermine trust.

Finally, participants cited elements of the tonality and presentation of news content as key indicators of trust. For example, images and video from unfolding events helped inspire trust by delivering a 'first-hand' view. Similarly, written text could be authoritative and immersive, with a formal tone carrying the hallmarks of trust. By contrast, trust was undermined where news content was perceived as having a sensationalist or overtly attention-grabbing tone.

The perceived capability and experience of news organisations is crucial to inspiring trust

Moving beyond considerations of content, participants trust in news was influenced by the perceived capabilities of news organisations. In particular, news was more likely to be trusted where organisations were seen to have the requisite news gathering credentials. These aspects of news organisations included their perceived levels of expertise and experience.

The perceived capability of news organisations was crucial to inspiring trust in the news product provided. For example, participants were more likely to place trust in news delivered by organisations with highly skilled and experienced journalists and editors. News organisations with wide-ranging reach and scope also fuelled trust, particularly where they were seen to have journalists 'on the ground' who could experience and observe events first hand.

Participants also highlighted the importance of strong track records in bolstering trust in news. Moreover, content delivered by organisations that were familiar to consumers and had reputations for news gathering was most likely to be trusted. Conversely, news content delivered by less well known organisations was more likely to be treated with caution, until trust was earned through positive experiences. The qualitative findings are echoed in this year's *Digital News Report*, which shows that – even among users of digital-born news brands – brands that have been active for longer are more likely to be relied upon as people's main online news sources.[3]

[3] Reuters Institute for the Study of Journalism, Digital News Report 2016, pp.94-96

Perceptions of the integrity and ethos of news organisations influence trust in news

At a top level, participants' trust in news was entwined with their considerations of the overarching integrity of organisations providing content. With aforementioned concerns regarding the undue influence of biases and vested interests, the values of news organisations were seen to be reflected in their behaviours. As a result, organisations known for objectivity and creditable values helped reinforce trust in the news consumed.

Responsibility also lies with consumers to proactively engage with the plurality of news sources available

Participants' trust in news was encouraged by the plethora of news sources available. The wide variety of providers available was seen to offer safeguards, with irresponsible or inaccurate reporting ultimately kept in check by the perspectives of other organisations.

However, several of the more avid news consumers actually cautioned against placing too much trust in news. They foresaw dangers in trusting news at face value, and advocated proactively comparing and contrasting perspectives across various sources.

It should be noted that the overwhelming majority of participants considered trust to be far more relevant and important in relation to serious rather than lighter news content.

News in distributed environments

The Reuters Institute's *Digital News Report 2016* highlights the continued growth of distributed (offsite) news consumption via aggregators and social media. To better understand the rise of distributed news, the qualitative research encompassed detailed examination of the behaviours and attitudes underpinning news consumption via aggregators and social media.

Trust in news aggregators is fuelled by the presence of familiar brands, yet awareness of aggregator services is limited among some groups

Awareness and use of aggregators was highest among more avid and proactive news followers, with the less tech engaged least likely to appreciate their role and value. With consumers often keen to triangulate perspectives across news brands, aggregators provide an efficient means of doing this. The less tech engaged typically failed to appreciate this and focused on the perceived effort of customising services and the possible content overload generated.

The presence of well-established brands helped establish credibility and trust, especially where aggregator brands were less well known. The visibility of news brands on aggregators varied between highly customisable app-based services (e.g. Apple News and Flipboard) and websites like Google News and Yahoo News. Brands typically achieved greater standout within more customisable services where users had actively pre-selected them in line with their existing interests. By contrast, when searching for news stories on website-based services, brands were somewhat less visible with headlines achieving foremost prominence amidst often text-heavy results.

Attitudes towards news consumption via social media are more complex, with a blend of both active and passive news following contexts

Participants' attitudes towards news following through social media varied in relation to the active and passive contexts of consumption. Similar to aggregators, where users had specifically followed or 'liked' news brands, content was expected and added credibility to social media services as news destinations. Contrastingly, where participants had more unexpectedly encountered news stories that had been commented on or shared by friends, a more complex filtering process ensued. In these instances, headlines and images typically achieved greatest initial standout, with brands and sharers subsequently referenced and considered.

Views about editors vs. algorithms are mixed, with the more digital savvy favouring the personalisation and perceived neutrality of algorithms, while others gravitate towards the familiarity and convenience of content selected by editors and journalists

The research also explored participants' views on the curation of content in distributed environments. They weighed up the relative advantages and disadvantages of algorithmically generated selections, versus having content selected by journalists and editors. The majority of participants had previously given little or no active thought to the distinction between the two approaches, with some having limited understanding of how algorithms generate content selections.

Those who were more tech savvy typically preferred algorithms, which they considered to be more independent and allowed quick access to a range of news topics and brands.

Algorithms were also favoured for delivering tailored selections that reflected people's content and brand preferences, and previous consumption habits.

However, several participants – and particularly the older and less tech engaged – appreciated the role of a traditional editor or journalist in selecting important content. They also appreciated the ease of navigating content curated by experts, with concerns that the overwhelming volume of content online would otherwise by unmanageable.

Future speculation

While a continued shift towards digital news consumption is widely foreseen, consumers are keen for traditional and trusted news brands to continue well into the future

Reflecting the trends charted in the *Digital News Report*, the vast majority of participants foresaw a continuing shift to digital news consumption at the expense of traditional formats. While TV and, to a lesser extent, radio, were seen as still having a role to play alongside digital platforms, the outlook was bleaker for print newspapers. Nonetheless, several participants expressed disappointment at the continued decline of print, with many valuing the immersive, personal experience of reading their favourite titles.

Almost all of the participants recognised a future role for established news brands, and were keen to see print and broadcast-born brands continue to deliver trusted content. They were aware of the economic pressures facing many traditional news brands, and hoped that they would be able to evolve and adapt to a rapidly evolving market.

2 Background and objectives

2.1 Background

The Reuters Institute's *Digital News Report* has been mapping the changing ecology of news across countries since 2012. The period has witnessed a rapidly evolving news landscape, fuelled by the rise of connected devices. There have been particularly significant recent increases in news following via smartphones and through social media. The rise of personal devices and distributed content has disrupted existing news consumption formats and business models.

Amidst an increasingly fragmented and complex news landscape, the Reuters Institute commissioned Kantar Media to conduct qualitative research into the attitudes and behaviours of today's news consumers. Research was required to inform the *Digital News Report* and to deliver rich illustrative material to bring findings to life.

The qualitative study explored issues of trust in an increasingly fragmented news environment, and specifically within distributed environments such as aggregators and social media. The project covered 4 countries – Germany, Spain, the UK and United States – with a series of pre-tasked discussion groups allowing detailed investigation of people's digital news habits and preferences. Fieldwork in each nation was split between groups of younger and older participants, encompassing digital users of various broadcast, print, and digital-born news brands.

2.2 Research objectives

Overarching objective:

- To explore issues of trust and value in an increasingly fragmented news environment, and specifically within more distributed environments

Specific objectives:

- Overall, to explore the drivers of trust, and mistrust, in news

- To explore what trust in news means and where it resides, exploring content (accuracy, relevance, impartiality), format, platform, brand, journalist, sharer
- To explore the role and strengths of different brands
- To explore the role of platforms in fostering trust in news in a more distributed and algorithmically driven environment
- To explore future implications and make comparisons across countries

2.3 Research approach and sample

2.3.1 Overview

A programme of qualitative research centred on discussion groups was devised to best meet the objectives of the study.

Figure 1: Research design overview

The fieldwork was founded on the development of a range of research tools, including the topic guide for the discussion groups and a variety of tasks and stimulus materials. Brand and platform cards were developed to stimulate discussion around people's news habits and attitudes, with short film presentations used to illustrate news following via distributed environments such as aggregators and social media.

Pre-tasking was included before the discussion groups to help sensitise participants to their actual news following habits and motivations, and the role played by digital sources. The pre-task included a news diary to build participants' awareness of news stories followed, and the sources, platforms and devices used.

In addition, a deprivation exercise required participants to live without digital news sources for a day to help uncover their role by disrupting often-habitual behaviours.

The final element of the pre-task asked participants to reflect on their favourite news sources by noting down why they valued the source and the words they most associated with it.

2.3.2 Discussion groups: approach and sample

Eight discussion groups lasting two hours each were conducted across four countries: Germany, Spain, the UK and United States. Each group comprised up to 8 participants, with 'younger' (aged 20-34) and 'older' (35-54) sessions conducted in each country. The research locations and key sample criteria are summarised below:

Table 1: Discussion groups sample matrix

GROUP	COUNTRY	CITY	AGE
1	Germany	Hamburg	20-34
2	Germany	Hamburg	35-54
3	Spain	Madrid	20-34
4	Spain	Madrid	35-54
5	United Kingdom	London	20-34
6	United Kingdom	London	35-54
7	United States	New York	20-34
8	United States	New York	35-54

Note: Fieldwork was conducted 9-17 February 2016

The discussion groups were principally split by age, with an even gender mix to encourage positive group dynamics. All participants had a high- or mid-level interest in news, with all following news at least several times a week. To encourage a sufficient breadth of coverage, quotas were set within each group on regular users of broadcast, print and digital-native news brands. With digital news a key area of focus, all participants were regular users of digital sources and users of mobile devices (i.e. smartphones, tablets, and e-readers).

Recruitment was closely monitored to ensure that each group covered a variety of news topics and categories of interest. Quotas were also set on political stances, from left- to ring-wing, to capture a range of opinions on the news landscape and perceptions of various brands.

Finally, minimum quotas were set within each group to ensure that users of aggregators and social media were included in the research sample.

At the end of each discussion group, two or three participants were invited to take part in short filmed interviews. The interviews allowed participants to reflect on emerging insights from the group discussions, while producing engaging film outputs to bring key findings to life.

2.3.3 Discussion flow summary

The diagram below outlines how key themes were explored during the discussion groups. Participants were initially asked to reflect on their pre-task diaries to investigate existing news habits and preferences. Discussion then progressed to uncovering the roles of different news platforms and formats, before considering perceptions of a variety of broadcast, print, and digital-born news brands.

With contextual understanding of the news landscape achieved, discussion progressed to key themes of interest, including trust in news and the roles of distributed environments. Ultimately, drawing on contributions made to the discussions, participants were asked to reflect on the potential future course for their news habits and the wider marketplace.

Introduction and warm up

Exploring news consumption and defining news

Exploring platforms and formats

Exploring brands (including broadcaster, print heritage and digital-born brands)

Exploring trust in broad terms and in relation to news

Exploring news in distributed environments, including social media and aggregator sites

Speculating about news in the future

Figure 2: Overview of discussion flow

3 Defining trust

3.1 Introduction

This chapter explores what ‘trust’ meant to participants, to provide context for subsequent exploration of trust in news. Participants were asked to explain what ‘trust’ meant to them in general before considering the relative levels of trust placed in various institutions, including the media.

3.2 Summary of key findings

- Participants most readily associated trust with a belief in someone or something, which is nurtured through positive experiences.
- Trust was easier for participants to relate to at a human rather than institutional level:
  - Associated with people being reliable and consistent;
  - Yet human fallibility can produce disappointing experiences and undermine belief.
- Participants’ trust in institutions greater where there has been good experience:
  - Eroded by scandals, perceptions of vested interests, and poor individual experiences;
  - Influenced by the national discourse.

3.3 What is trust?

Across the countries and age groups, the vast majority of participants perceived trust as being inspired by a belief in someone or something that was developed through positive experiences. They most readily understood trust in terms of interactions with people rather than with institutions or organisations. Indeed, most participants found it easier to describe trust in terms of relationships with close friends and family that had been nurtured over time.

The diagram below summarises the main elements underpinning participants’ understanding of trust.

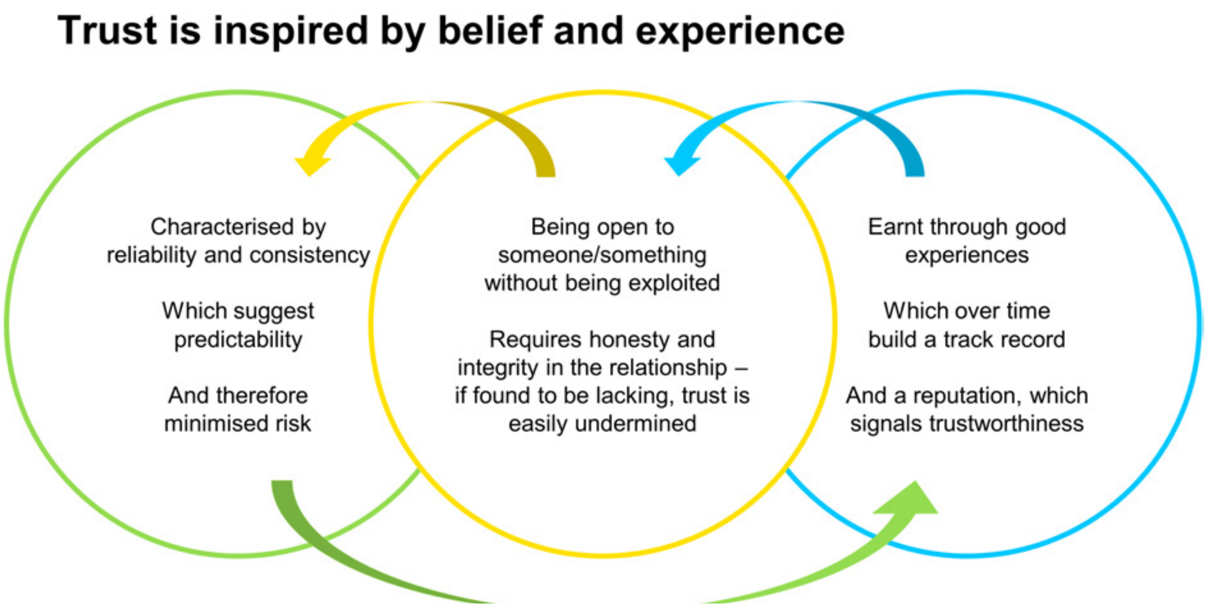

Figure 3: Defining trust

"That I can believe what they're saying without having to question it." (35-54, UK)

"Oh I'd like say consistency. Almost like you kind of know what you're going to get with that person so you feel more comfortable with them." (20-34, US)

"It builds up across the years. You trust people once. And when they do something fine and you recognise you can trust this person…then you also trust this person a second time. It grows. Of course, you have to test it. Sometimes you may have to take some risks by trusting a person." (20-34, Germany)

"Something that you totally believe, that you don't ask yourself if it's true or false, you don't have any doubts. You believe what they tell you, you trust they will not deceive you." (20-34, Spain)

3.4 Trust in institutions

Trust in institutions varied more notably across markets, with trust levels generally higher in Germany and the UK than in Spain and the United States. The qualitative perceptions of the relative levels of trust in institutions are summarised in the diagram below, with selected institutions plotted from 'higher' to 'lower' trust. It should be noted that the mapping has been developed for illustrative purposes, and is based on qualitative discussions rather than on analysis of large-sample quantitative data.

Figure 4: Trust in institutions

3.4.1 Doctors and teachers

The vast majority of participants in all countries consistently placed greatest trust in doctors and teachers. Their trust in doctors and teachers reflected the foundations of trust in friends and family, as it was developed through interactions with individuals rather than ‘faceless institutions’. In addition, several participants cited trust in doctors and teachers that was based on their training and accreditation, and strict professional guidelines that had to be adhered to. However, a few participants mentioned that trust in teachers and, in particular, doctors, could be undermined where economic interests and targets potentially conflicted with pupil and patient interests.

> *“For me in various aspects I see that there’s a lot of biases and opinions based on your relationships with those individuals. But doctors, you’re depending on your life with them, so for that reason, trust I think could be much more established with doctors than the others.”* (35-54, US)

> *“At the doctors, for example…I used to trust my family doctor. I can’t do that any longer because he has kind of specific budgets now. And he can’t do some*

> *examinations on me because it's not in his budgets. Even though it might be necessary."* (35-54, Germany)

> *"You can find fault with all of them. But if you've got kids, you send them to school, they're there for eight hours and they're being looked after by somebody called a teacher…In general you trust that school with your most valuable 'item'."* (35-54, UK)

3.4.2 The police

Across the countries, the next highest level of trust was assigned to the police. Several participants highlighted dealings with individual officers and the general trust placed in the police to protect citizens. However, a few participants also expressed reservations about trusting the police on an institutional level, with trust somewhat undermined by scandals and perceived institutional interests.

> *"Maybe in our region…our town officer. The town policeman…I would trust him. I would trust individual people, but not the institution behind it."* (35-54, Germany)

3.4.3 Courts of law

With the exception of Spain, law courts achieved a broadly similar level of trust to the police among most participants. They pointed to the legal precedents that courts had to adhere to, with trust founded in well-established laws and procedures that had to be followed. Nonetheless, in Spain, trust in the judiciary was significantly lower, with several participants observing potential establishment biases and cases of corruption. Indeed, many participants in Spain mentioned declining levels of trust in institutions in recent years, amidst a period of economic crisis, several high-profile scandals, and acute political uncertainty.

> *"It's [trust] something that's been lost. Ten or fifteen years ago there was a lot more trust around than there is now. It's at rock bottom."* (35-54, Spain)

3.4.4 The media

In all the countries, the media achieved a mid-level of trust in relation to the other institutions considered. Several participants cited the positive role of the media in helping hold other institutions to account, and in generally providing a valuable source of information and entertainment. Nevertheless, most also recognised that media organisations were subject to potential influence from owners and other institutions, and could be liable to sensationalise or overstate stories to grab attention and market share. In the UK, in particular, several noted that recent scandals involving the tabloid press had somewhat undermined trust in the media.

> *"The media doesn't always self-reflect, does it? Everybody else is beholden to the media."* (20-34, UK)

> *"You've got to trust the media sometimes. Some of them are risking their lives to bring you a story. They're doing it for the right reasons."* (35-54, UK)

3.4.5 Banks

Banks were generally held in lower esteem by most participants, although trust levels were somewhat higher in Germany. The majority of participants had reservations regarding trust in banks on an institutional level due to the perceived self-interest of big business and the recent financial crisis. However, several participants placed greater trust in the individual branches and employees that handled personal accounts.

> *"It depends on the person that you deal with. There used to be a man I trusted a lot, but now he's not working at that branch anymore and the new person I don't trust at all."* (20-34, Spain)

> *"Before there was a lot of trust in what they told you. You could trust your bank manager if he told you to buy some shares because they were excellent. And now look what's happened."* (35-54, Spain)

3.4.6 Government

The trust placed in government varied most strikingly across the countries. Trust in government was generally higher in Germany and, to a lesser extent, in the UK. In Germany, the higher level of trust appeared to stem from a more consensual and regionalised style of politics, with attitudes towards the government somewhat less polarised than in other markets. In the UK, most participants had a mid-level of trust in the government as an institution, although perceptions did vary in relation to political allegiances.

“I would put the government up there because as much as people say ‘oh, I don’t trust the government’, you’d rather have a government than not have one, so I think everyone sort of does trust them in some way or another.” (20-34, UK)

Trust in government was at its lowest in the United States and in Spain. In the United States, participants’ perceptions appeared to reflect a general mistrust in the role of government, and a highly polarised political landscape. In Spain, the research fieldwork took place against the backdrop of ongoing negotiations to form a government, and generally low levels of confidence in political institutions amidst recent crises and scandals.

“Anyone who isn’t part of their political party will tell you that they don’t trust the government.” (20-34, Spain)

4 News and platforms

4.1 Introduction

This chapter explores participants' existing perceptions and consumption of news content. Firstly, we will briefly consider what people consider 'news' to be and the elements that underpin it. Participants' existing news habits will then be investigated by delving into discussion around pre-task news diaries and their deprivation-task experiences of living without digital news. Finally, we will examine perceptions of different news formats by comparing the roles of broadcast, print, and online platforms.

4.2 Summary of key findings

- Platforms (e.g. print, TV, web, and social media) fit into different routines and help people engage with news stories in different ways.
    - Smart devices provide easy access and encourage frequent checking of news.
    - Social media works well for breaking news and for many people provides a supplement.
    - However, social media is gradually eroding some traditional platforms, especially print newspapers.
- Platforms perceived as having relative strengths and weaknesses:
    - **TV:**
        - ✓ Delivers an effortless, curated experience and a direct visual connection with unfolding events
        - × Repetition of content items across bulletins, and can be light on the level of detail provided
    - **Print newspapers:**
        - ✓ Immersive, detailed coverage with the written word conveying authority
        - × Less up to date than digital formats, with more cost and effort required

- **News websites:**
  - ✓ Up-to-the-minute coverage, blending the visuals of TV and the detail of print. Allows fast comparison of different sources and perspectives
  - × Difficult to navigate and overwhelming for some, and news credentials can be undermined by clickbait-style content
- **Social media:**
  - ✓ Offers easy, passive news consumption and can be tailored to personal tastes
  - × Reservations regarding the accuracy of coverage and the often heated debates sparked around news stories

4.3 What is news?

Before progressing to discussion of the platforms used, participants were invited to explain how they would define news and its characteristics. For the vast majority of participants, raw facts were the essential building blocks of what they considered news to be. These raw facts included the core reporting of current events, and the provision of associated information and knowledge.

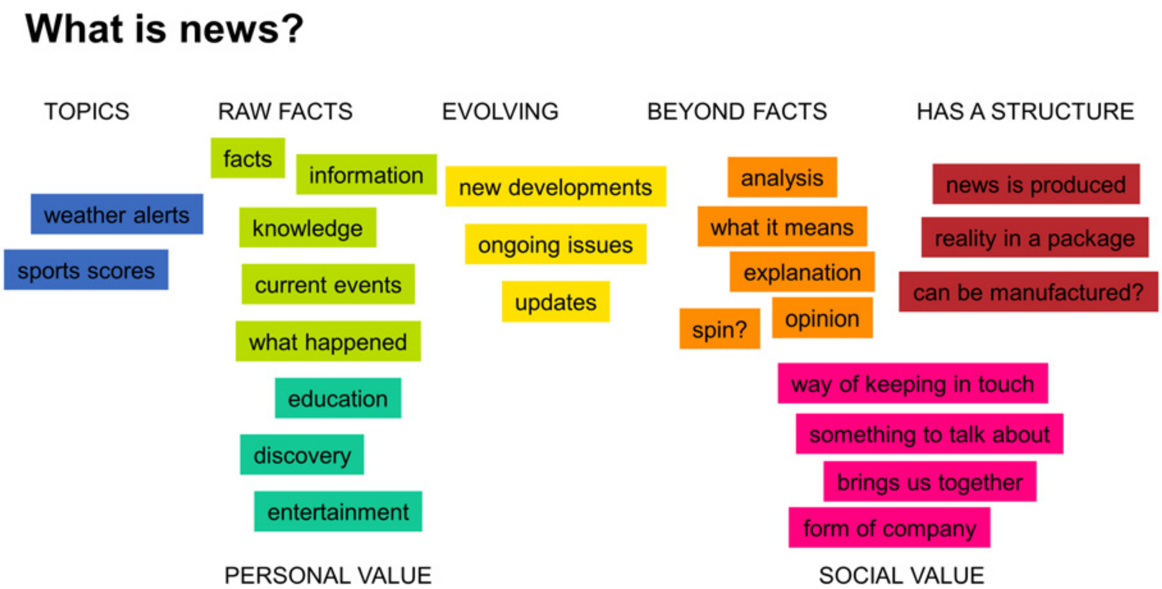

Figure 5: Participants perceptions of what ‘news’ is

In addition to the raw facts of current events, the majority of participants understood news to be broad in its geographical scope. Indeed, they almost universally recognised news as offering local, regional, national, and international coverage.

With regards to the categories encompassed by news, most participants associated news with a variety of serious and lighter subject matters. Indeed, while they most readily related news to harder content, such as politics and current affairs, there was widespread appreciation that news also covered entertainment and lifestyle content. In addition, several participants noted topics closely linked to news, such as sports and weather updates.

For most, news was associated with ongoing coverage and following of developing stories, rather than simply providing a snapshot of the present. The evolving nature of news was most discussed with respect to often complex and long-running stories.

While most participants principally identified news with reporting facts, there was recognition of a role in providing additional analysis and explanation. The more avid news followers were most likely to cite the value of news in transcending the basic reporting of facts, and allowing greater immersion and understanding. Conversely, less avid news followers were more likely to highlight potential dangers of biases and spin where news coverage progressed from objective reporting to deeper analysis.

Finally, beyond the core characteristics of news, participants' discussions unearthed associated personal and social benefits. On a personal level, several participants noted the value of news in providing education and entertainment. News was also seen by many to have a social value, with content fuelling conversations with others, bringing people together around mutual interests, and even offering a sense of company when consumed.

4.4 Living without digital news sources

As part of the pre-tasking, participants were asked to live without digital news sources for a day. 'Digital news' was described as any news consumed via the internet, including news accessed through web browsers and apps, and using any connected devices (e.g. laptops, tablets, and smartphones). The task was designed to raise participants' awareness of the role of digital news by disrupting their existing habits.

Selected examples of participants' written reflections on living without digital news are provided below, along with some key headline learnings from the exercise.

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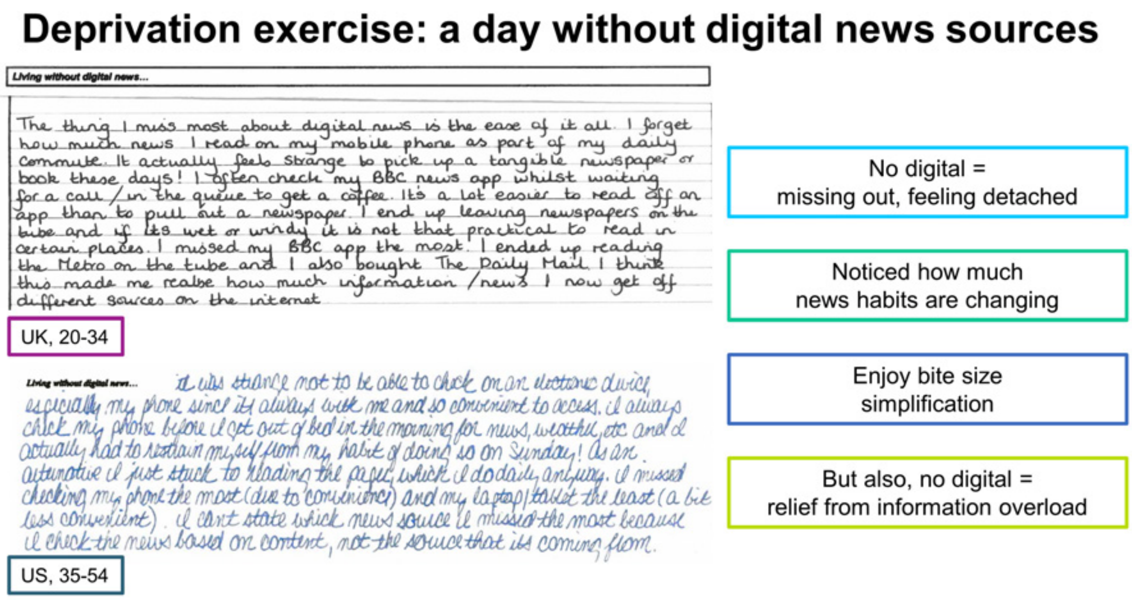

Figure 6: Reflections on deprivation exercise

Among a sample of regular digital news consumers, it is perhaps unsurprising that the majority described missing out on something they valued. The younger and more tech-engaged participants were particularly likely to report feeling detached from breaking and developing news stories. They were also most likely to miss the effortless updates delivered throughout the day via connected devices.

> *"The thing I missed most about going without digital was being able to relax and catch-up on what's going on in the world as soon as I wake up in bed. I travel a lot with work and enjoy being able to catch-up with news while on the go. Unlike newspapers or TV broadcasts, news available on a digital format will automatically update themselves when more is known. I missed getting a buzz notification when a breaking news story emerges."* (20-34, UK)

> *"I noticed without digital news I had to work harder to find out what was happening around the world. Other than the news that Antonin Scalia died which was rampant throughout all media sources, I had no idea about any new important things until I had watched the evening news. Normally I would get an alert or some kind of signal to read the news on an app to find out instantly what is happening."* (35-54, US)

The experience of living without digital news also sensitised participants to how their news following habits had changed in recent times. While traditional print and broadcast formats continued to play a valued role, several participants reported missing the bite-size updates provided by digital sources. Indeed, while they recognised that print and broadcast formats provided an immersive experience, the constantly updated and always-accessible nature of digital was missed.

> *"My existing habits make me realise that I/ we need our news in quick little 'bites' now. We no longer rely on the paper or newscasts to keep us up to date the second things happen. More often than not I read about breaking news on Facebook first."* (20-34, US)

> *"I missed the button 'bite-size' news feeds, as just enough to decide whether to follow or entice enough to source out the full news story."* (30-54, UK)

Several participants, and particularly the younger and more tech engaged, also noted benefits of living without digital news for a day. They mentioned the relief of taking a break from the often-compulsive use of smart devices to keep abreast of the news, and the time freed up for other activities.

> *"What I missed the least is being tied to my phone for the extra time I spend reading the news…I noticed that I have an almost compulsive habit to check the phone for news even though I probably knew I won't find anything earth-shatteringly new."* (20-34, US)

> *"There were some upsides – I felt I was somewhat liberated from my phone and social media in general! I was able to read more of my novel during the day. I took an interest in certain news articles in the paper I normally wouldn't bother reading."* (20-34, UK)

4.5 How is news consumed?

Participants were also asked to complete a news diary in advance of the discussion groups, to help sensitise them to their often-habitual news following. The diary required participants to note down the news stories they followed, the times of day that they followed them, and the news brands, platforms and devices used.

The chart below provides illustrative scans of completed news diaries, along with a summary of the key habits that participants observed.

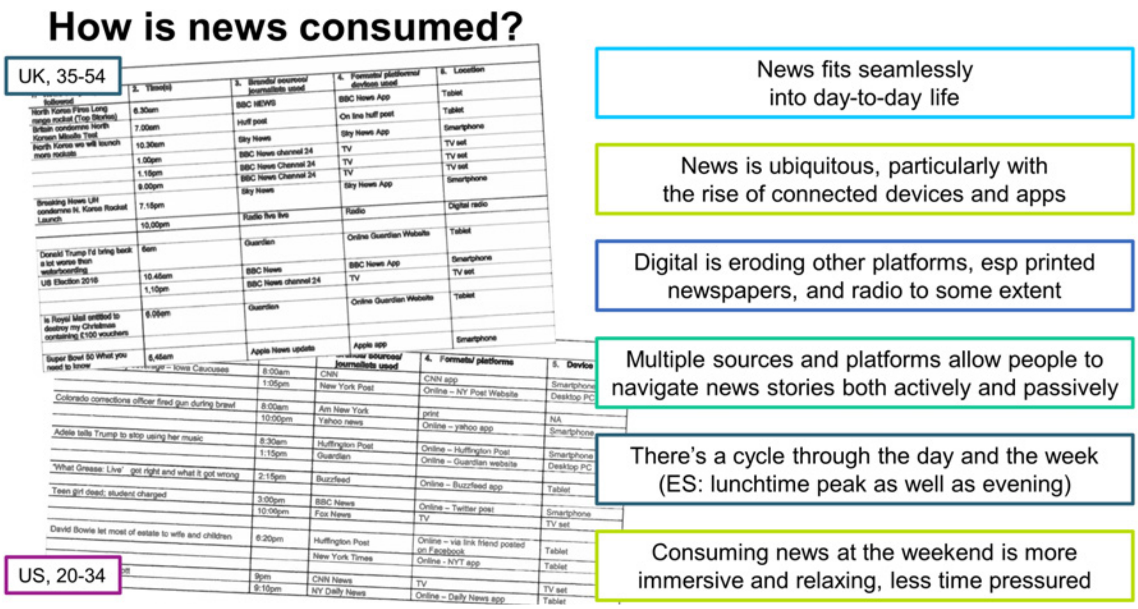

Figure 7: Reflections on news diaries

The vast majority of participants recognised how keeping up-to-date with the news fitted seamlessly with other daily rituals. Most participants, particularly the more tech engaged, noted how the rise of connected devices had fuelled the increasingly always-available nature of news. Compared to previous habits where reading a newspaper or watching TV bulletins were often associated with specific daytimes, connected devices plugged the gaps allowing people to be kept constantly abreast of breaking and developing stories.

Several participants, across the age range, observed how the use of digital news sources had steadily eroded their use of more traditional print and broadcast formats. For example, the majority of commuters had migrated from print newspapers to using more convenient online sources on their personal devices. Nonetheless, many continued to use print-born news brands, and had simply switched from print to digital formats.

Likewise, several participants – most likely the younger – reported checking the news on connected devices first thing in the morning, rather than tuning into radio bulletins. However, where participants travelled frequently by car, the effortless nature of radio news continued to be favoured.

It should be noted that amidst a steady transition from traditional to digital formats, many participants continued to gravitate towards broadcast and print news at particular dayparts and at the weekend. For example, many of the older participants still valued the ritual of immersing in evening TV news bulletins after a day of work. Likewise, several valued being able to immerse in the week's news through TV magazine shows broadcast at the weekend.

Similarly, some participants – including the younger – appreciated the tactile experience and depth of coverage provided by weekend newspapers. For many, the experience of immersing in a print newspaper at the weekend represented an escape from the compulsive checking of connected devices that increasingly characterised midweek news following.

The diaries also illustrated how almost all participants used a variety of sources and platforms for active and passive following of news stories. For example, there were instances where participants discovered stories while passively consuming news, whether by having the TV or radio on in the background, or stumbling across content on web homepages or having updates 'pushed' to them via news apps.

There were many associated instances where participants further immersed in stories that had piqued their interest using various news sources and platforms. Indeed, several participants delved into stories further via websites while on lunchbreaks, or by reading the evening paper on the journey home or catching evening TV news bulletins or rolling coverage on dedicated news channels.

4.6 Comparing platforms

In this section we will explore participants' perceptions of the roles – and perceived strengths and weaknesses – of various news platforms. To give broad coverage from traditional to emerging platforms, participants were asked to consider the relative merits of TV, print newspapers, news websites, and social media.

4.6.1 TV

The majority of participants, and particularly the older and less tech engaged, continued to place high value in TV news. They strongly associated TV news with offering an effortless, curated experience, and a direct visual connection with unfolding events. Several participants highlighted the always-available nature of TV news provided by rolling 24-hour services, and the social value of being able to discuss stories with others in the room.

Nonetheless, several participants identified relative shortcomings of TV news versus other formats, such as the repetition of items across bulletins and the often light level of detail provided. In addition, some participants – particularly in Spain and the United States – associated TV news services with specific stances or biases, often related to ownership and perceived political agendas.

The perceived strengths and weaknesses of TV news are summarised in the diagram below, along with selected verbatim comments from participants.

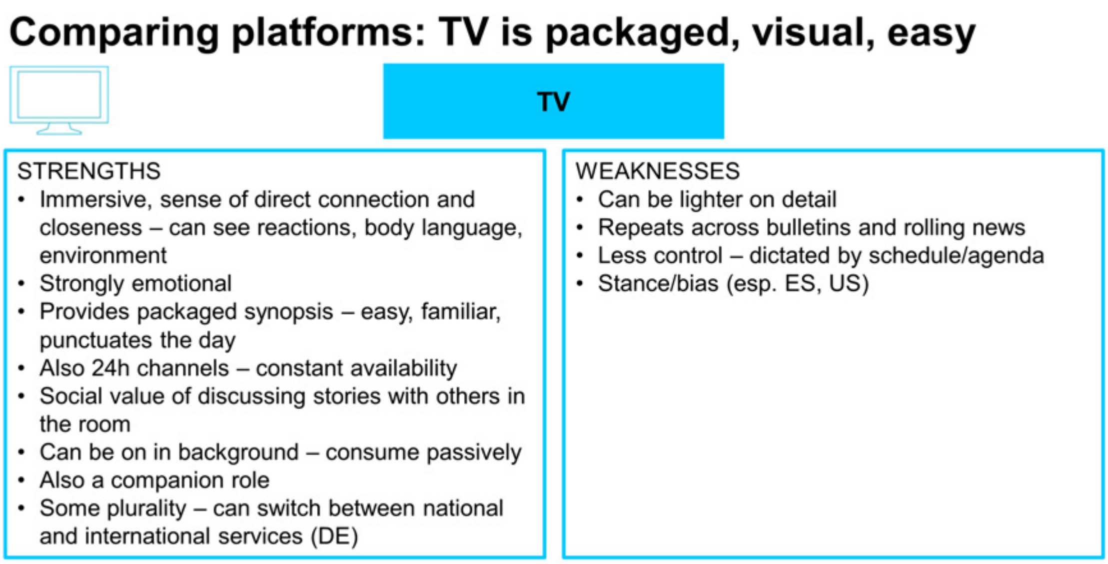

Figure 8: Comparing platforms – perceived strengths and weaknesses of TV

"The good thing is the visuals, the images, that's its strength. Its weakness is that it's been gradually losing credibility over time and appears to be more and more biased." (20-34, Spain)

"For me it's kind of a ritual. Like Sunday or Saturday evening, starting the evening at 8pm by watching Tagesschau. Inform yourself about what's happened during the week. An advantage is that it's emotionally touching. The visual…to see war pictures and misery and fleeing…it really affects me." (35-54, Germany)

"In the middle of the night I'll turn the TV on…and I'll watch Al Jazeera, RT, France 24. You know, I can watch all that. And I know some of them out there are biased. I understand where the biases are." (35-54, UK)

"I think that's a really good way to get news [NBC Nightly News] because it's only half an hour but it gives you a good synopsis of like everything that happens that day, because you know now we're in this 24-hour news cycle. But I mean is there really that much going on that we need to know about?" (20-34, US)

4.6.2 Print newspapers

Like TV, print newspapers were generally most valued for news by the older and less tech engaged. However, several of the younger participants also appreciated the break that print formats offered from otherwise predominantly digital consumption.

For the majority of participants, print was valued for providing immersive, detailed news consumption with the written word conveying authority. Print was also strongly associated with greater control over the choice of content and the pace at which it is consumed. Several of the older participants cited a nostalgia value in print consumption, while many – across the age range – enjoyed the quiet time of engrossing in a favourite newspaper.

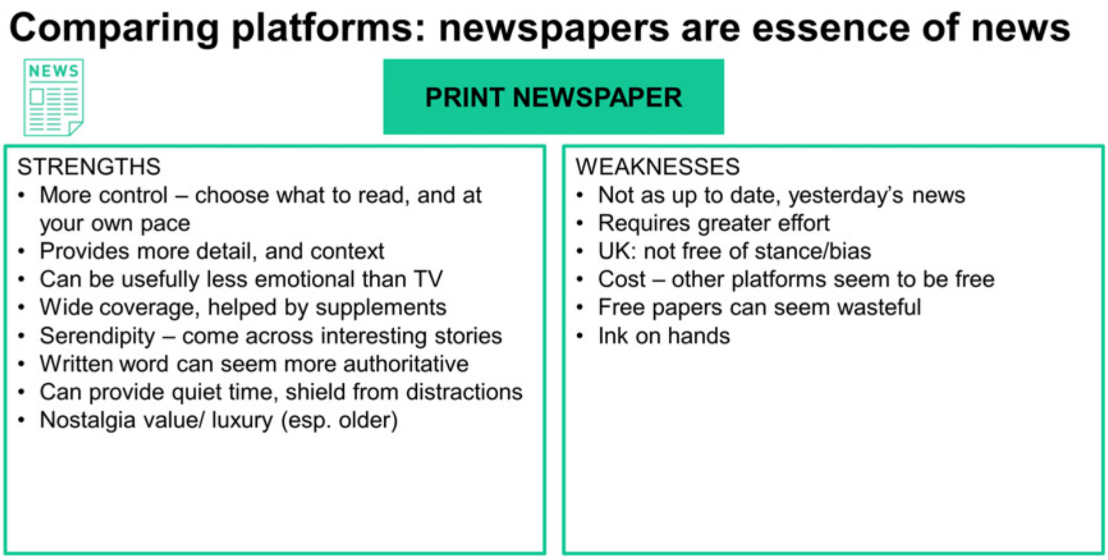

Figure 9: Comparing platforms – perceived strengths and weaknesses of print newspapers

"So I get the New York Times every day and like the ritual of course…but also the fact that there's something cool about it, I feel more in control of the news when I'm reading the paper because it's a fixed thing that can't be changed, you know it's the morning paper. It was printed at whatever time and that's the only

news I can consume. I can decide what I read, when I read it and I'm not being bombarded from all sides. And there's something kind of tranquil about that, especially early in the morning with a cup of coffee." (35-54, US)

"It's a luxury. For me, it's a luxury article. Sitting, having a cup of coffee. Drink my coffee. Time for myself. Nobody may interrupt me. Saturday morning I really get upset when somebody is disturbing me. So, that's just time for me." (35-54, Germany)

"The highest quality journalism can be found in print journalism." (20-34, UK)

Participants also noted the relative weaknesses of print newspapers, with several mentioning that they were not as up to date as digital or broadcast formats. Some participants cited the relative effort in having to go out and buy a newspaper, with the cost comparing unfavourably with other formats that were seen to be free. In addition, several participants, especially in the UK, highlighted the marked political stances and biases of print-born news brands.

"They're stories from the previous day; they're no longer up to date." (35-54, Spain)

"It costs money, it's bulky, it's cumbersome, it gets crumpled, it gets wet, a page might fall out…the ink stains your hand." (20-34, Spain)

4.6.3 News websites

Online news websites were seen to deliver up-to-the minute coverage, blending the detail of print with the visuals of TV. Moreover, the online services of print and TV brands benefit from already well-established news credentials.

Comparing platforms: websites make news up-to-date

NEWS WEBSITE

STRENGTHS	WEAKNESSES
• Kept up to date, and can get alerts • Customisable • Plus credentials of print – authoritative, breadth and depth of coverage • Also provides film and some live coverage – like immersive first-hand experience of TV • Good for commenting, interacting • Offers quick, multiple points of comparison • Convenience, fits well into commuting, can be anywhere • Generally free	• Can be confusing, information overload • Lots of useless information/filler – tendency to clickbait style headlines over substance and accuracy • Requires internet connection and battery • Some sites require subscription • Does not fit into usage routines of print – a different experience

Figure 10: Comparing platforms – perceived strengths and weaknesses of news websites

Several participants, especially the more tech engaged, valued the quick access that online news websites gave to various sources and points of comparison. They also appreciated the convenience of news websites, with connected devices allowing news stories to be easily followed throughout the day.

> *"They're [news websites] like up to the second so if something happens where there's you know a building collapsed or there's like a mass shooting somebody tells you and then you can go on a website and there's somebody giving minute-to-minute coverage of it."* (20-34, US)

> *"It's very thorough and detailed compared to television. When they talk about something on television you hear about it for two or three minutes and when I think of the online article where you can read about it…that's much more detailed and they also have different experts. You see images, opinions."* (20-34, Germany)

> *"It's more up to date and it's instant. When it happens they tell you about it. It's not like with the newspaper."* (35-54, Spain)

In terms of more negative aspects, some of the older and less tech engaged participants associated the wealth of news coverage available online with a possible information overload and a confusing user experience. Some participants also expressed frustrations with the lighter clickbait-style content (e.g. lists, quizzes, and more lifestyle and celebrity oriented material) that could distract from a focus on more serious news stories.

4.6.4 Social media

The distributed social media environment proved more divisive. While it was valued for breaking news and content from established brands, misgivings were expressed over the accuracy of information and over the heated comments and debate that were often generated.

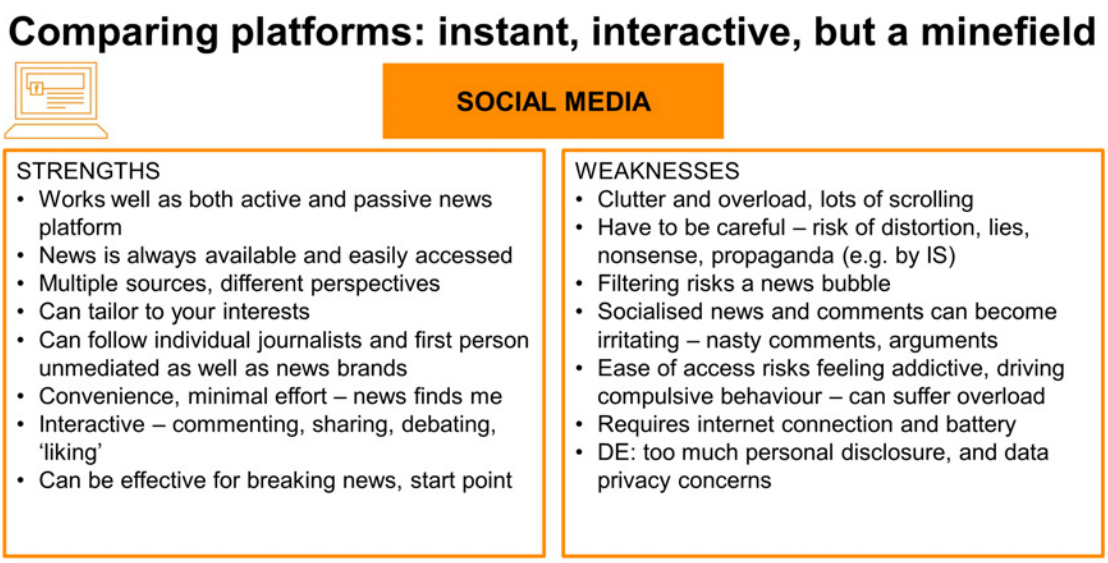

Figure 11: Comparing platforms – perceived strengths and weaknesses of social media

Social media was generally most valued for news by the younger participants who were typically the heaviest social media users. They appreciated the manner in which news was often passively served to them, and the ability to share and comment on stories. Several of the more avid news consumers highlighted the customisable nature of social media, where favourite news brands and journalists could be actively followed for a more tailored experience.

> *"They're more specific to your taste because you 'like' things on social media, so it filters the news stories that are most in line with your taste."* (20-34, Spain)

> *"I think it's very important for younger people. I don't think a lot of young people sit in front of TV to watch the newscast. And now in Facebook, they automatically see it and just click on it. It's better than not being interested in news at all."* (20-34, Germany)

> *"You are essentially the editor, aren't you, because you just select your sources, generally speaking."* (20-34, UK)

By contract, the older participants were more likely to express reservations about the veracity of news stories shared, and concerns about the often personal and heated nature of accompanying comments. Several older participants, particularly in Germany, were also concerned about data privacy and disclosing personal information when engaging with brands on social media – and when using the services in general.

> *"I don't like it on Facebook because it starts so many arguments. It just gets really uncomfortable."* (30-54, US)

> *"You really have to pay attention to the privacy settings and the security."* (30-54, Germany)

4.6.5 Comparing platforms – in summary

Comparing platforms – in summary

TV	Easy, entertaining, packaged, available, visual
PRINT NEWSPAPER	Journalistic, essential, ritualistic, but not up-to-date content
NEWS WEBSITE	Up-to-date, live, convenient, news brand credentials, clickbait
SOCIAL MEDIA	Instant, effortless, interactive, mobile, but a minefield

Figure 12: Comparing platforms summary

5 Perceptions and role of brands

5.1 Introduction

In this chapter we will explore participants' perceptions of the online news landscapes in each of the four countries covered by the research. For each country, we will also examine participants' views on a selection of print, broadcast, and digital-born news brands.

5.2 Summary of key findings

- Brands largely perceived along traditional platform lines
  - Broadcasters, print heritage, news aggregators, and social media
- Print heritage further segmented by editorial approach
  - Entertaining/ tabloid vs. serious/ broadsheet (UK)
  - Political leaning – liberal vs. conservative (UK, US), especially among older participants
- Digital-native brands not as well known, especially among the older and less tech engaged
  - Some brands seen to have niche proposition (e.g. entertainment focus, and/ or entertaining style)
  - Often fit with a repertoire alongside more established news brands – role in comparing/ triangulating perspectives
- People use a repertoire of news brands
  - Tend to have a preferred source for initial awareness
  - Might follow up elsewhere to verify the news, corroborate the story, get more detail

- Individual brands have different strengths and roles – across stages of news story evolution, and times of day, across different platforms

5.3 Perceptions of the online news landscape

Participants undertook a group card-sort exercise to delve into perceptions of various print, broadcast and digital-native news brands within the digital news landscape in each country. They were asked to group together brands they considered to be similar for reasons of their choosing, rather than having criteria imposed. Participants in each session were tasked with creating brand groupings from around twenty brands tailored to each country, with the findings summarised below.

5.3.1 Germany

The brand clusters for the focus groups in Germany are captured in the images below. While the brand groupings highlight several similarities between the perceptions of the younger and older participants, the younger group generally had a greater awareness of and familiarity with digital-born brands.

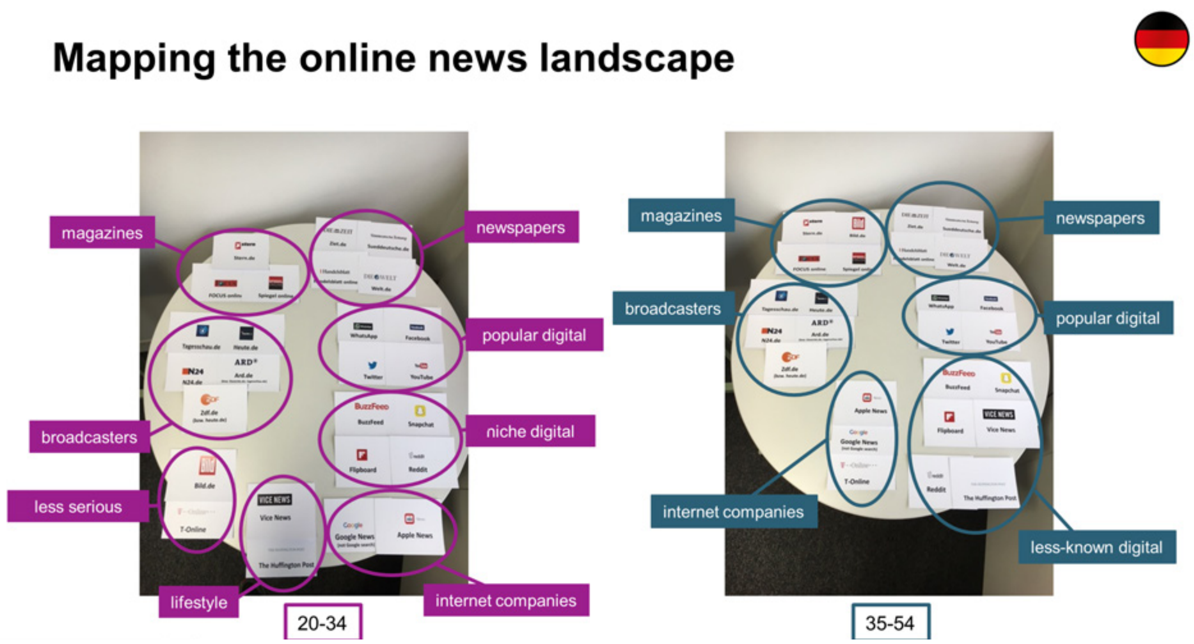

Figure 13: Brand mapping – Germany

In the younger and older groups, participants sorted a variety of well-established news brands into groups of ‘broadcasters’ (e.g. ZDF, Tagesschau), ‘newspapers’ (e.g. Die Zeit, Süeddeutsche) and ‘magazines’ (e.g. Focus, Stern). However, while the older participants placed Bild with other ‘magazines’, the younger group separated it out alongside T-Online due to a perceived focus on ‘less serious’ news.

The younger and older participants identified groups of ‘popular digital’ brands, including social media services like Facebook and Twitter, and the prominent video and communications brands, YouTube and Whatsapp.

Moving beyond the ‘popular’ digital brands, the younger group were more able to separate the other digital-born brands into more tightly defined clusters. For example, the younger group identified a group of ‘niche’ or more emerging digital services – including BuzzFeed and Snapchat – which were seen as distinct from more established brands such as Facebook, Twitter and YouTube. Furthermore, the younger group clustered Vice News and The Huffington Post together as they were associated more with ‘lifestyle’ oriented content than hard news.

5.3.2 Spain

The groupings in Spain were consistent across the younger and older sessions, with participants broadly arranging the brands by platform.

Mapping the online news landscape

Figure 14: Brand mapping – Spain

With regards to ‘newspaper’-related brands (whether print heritage or digital-born), these were grouped by whether they were available in both print and digital formats, or digital only. The ‘print & online’ cluster included well-established brands such as El País and El Mundo, while the ‘online-only’ group included more recently founded Spanish brands such as El Español and El Confidencial, as well as The Huffington Post.

The younger and older groups also clustered broadcaster brands together, including a mix of traditional TV and radio brands (e.g. RTVE and Cadena SER). Participants in both groups also split distributed news environments into two distinct brand groups of ‘social media’ (e.g. Facebook and Twitter) and ‘aggregators’ (e.g. Flipboard and Apple News). Reflecting the groupings in Germany, the participants in Spain also grouped together some ‘less-known digital’ brands, which included Snapchat, BuzzFeed and Reddit.

5.3.3 UK

While the younger and older groups in the UK broadly distinguished brands by platform, they also arranged newspaper brands in relation to their perceived categories (i.e. tabloids vs. broadsheets).

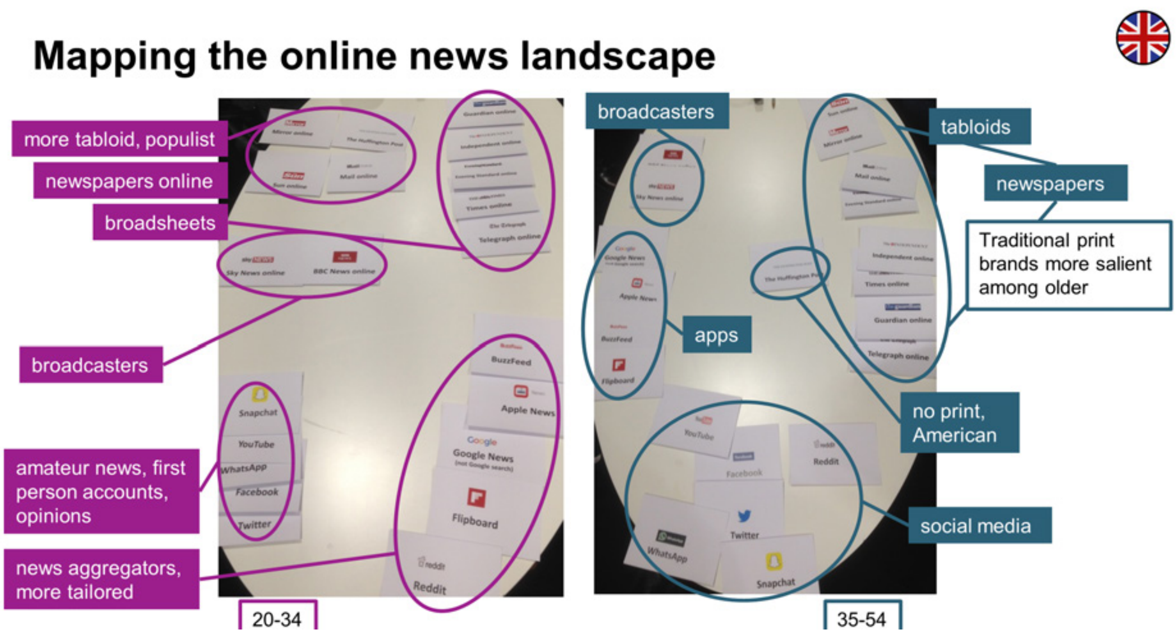

Figure 15: Brand mapping – UK

For example, the younger and older participants both clustered the traditional ‘red top’ brands of The Sun and The Mirror and, to a slightly lesser extent, Mail Online, in relation to their perceived ‘tabloid’ or populist characteristics. Similarly, both groups separated out more ‘broadsheet’ brands within the print category, including The Times, The Guardian, and The Telegraph. The younger group associated The Huffington Post with the more ‘tabloid’ or populist newspaper brands, with the older participants placing it in a separate category due to its American heritage and digital-only status.

While both groups readily clustered BBC News and Sky News in a ‘broadcasters’ category, their reasoning differed with regards to more digital-native brands. Indeed, as with Germany and the United States, the younger participants generally displayed a more nuanced understanding of the digital-born brands.

The older group broadly split the digital-native brands into groups of ‘social media’ (e.g. Facebook, Twitter, and Snapchat) and a somewhat catch-all group of ‘apps’ (Apple News, Google News, BuzzFeed), which few participants were familiar with. By contrast, the younger participants were more familiar with the digital-born brands and better able to distinguish them with regards to the types of news services and content they provided. For example, the younger group identified a group of ‘aggregators’ (e.g. Google News, Flipboard) that were seen to offer tailored news experiences. They also grouped together social media, video and communications brands in relation to associations with citizen journalism, and more amateur first-hand accounts.

5.3.4 United States

While the brand mapping in the United States also broadly followed platform lines, the clusters were generally less sharply defined. In particular, the exercise in the older group was influenced by the perceived ideological stances of brands, as well as consideration of the platforms with which they were most associated.

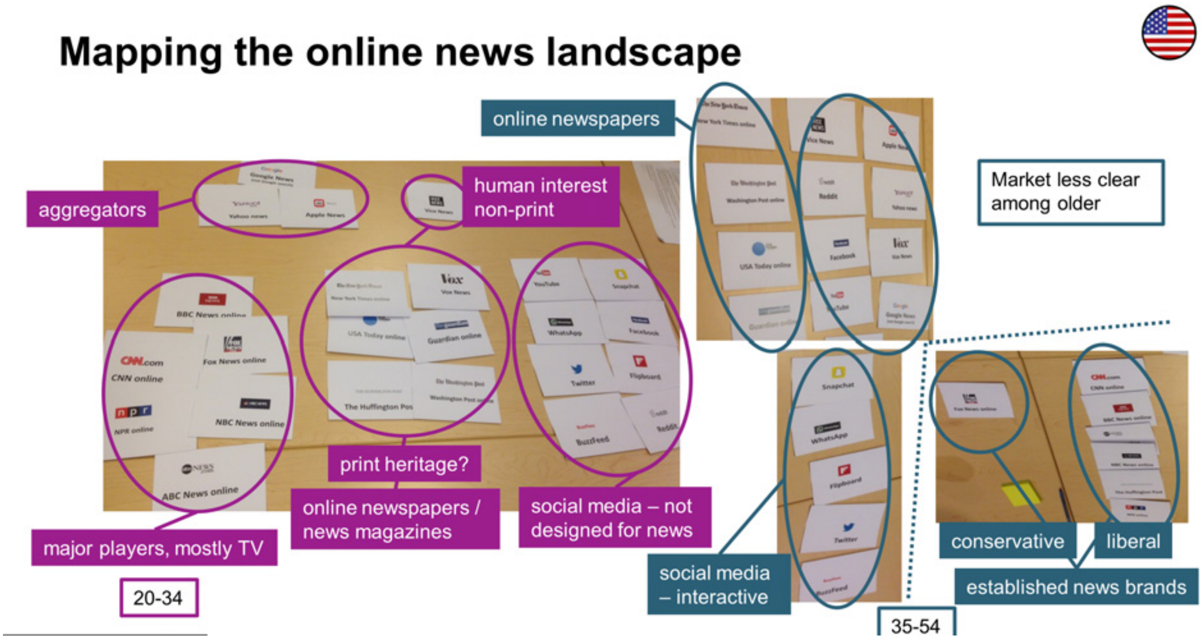

Figure 16: Brand mapping – United States

Mapping broadly by platform, the younger participants identified a group of 'major players', comprising broadcast-born brands such as NBC News and Fox News. They mapped 'online newspapers & magazines' together, with the group including traditional print brands such as The New York Times and The Guardian, alongside digital-born brands like The Huffington Post. However, the younger participants did separate out Vice News from the other online newspapers and magazines as it was seen to be more 'human interest' than hard news oriented.

The younger group also sorted the distributed-environment brands into broad groups of 'aggregators' and 'social media'. The 'aggregators' group included prominent digital brands, such as Apple, Google, and Yahoo, with the 'social media' cluster including Facebook and Twitter, along with other digital-born brands such as Whatsapp and BuzzFeed. When describing the 'social media' group, the younger participants did not primarily associate the brands with news, or at least not serious news.

As in the other countries, the older participants in the United States generally had lower awareness of and familiarity with the more recently established digital-born brands. They were quickest to separate out clusters of 'online newspapers' (comprising traditional print brands such as The New York Post and The Washington Post), and ‘established’ news brands, which essentially included major broadcast-heritage services.

However, with a mix of political views within the older group, the broadcast brands were further segmented in relation to their perceived ideological leanings. This process resulted in a ‘conservative’ group comprising Fox News in isolation, with the other brands seen as – to varying degree – ‘liberal’ in comparison.

Finally, the older group in the United States broadly divided the majority of the digital-born brands into ‘social media’ services and a somewhat ‘miscellaneous’ cluster of other brands. The ‘social media’ group included services such as Twitter and Snapchat, with the ‘miscellaneous’ group including a broad assortment of digital-born content providers and aggregators.

5.4 Perceptions of selected brands

In addition to the brand mapping, participants discussed their opinions and perceptions of a selection of news brands. The brands considered were tailored to each country, and generally encompassed a mix of broadcast, print and digital-born brands. Participants’ perceptions from each country are summarised below, along with illustrative verbatim comments relating to each brand.

5.4.1 Germany

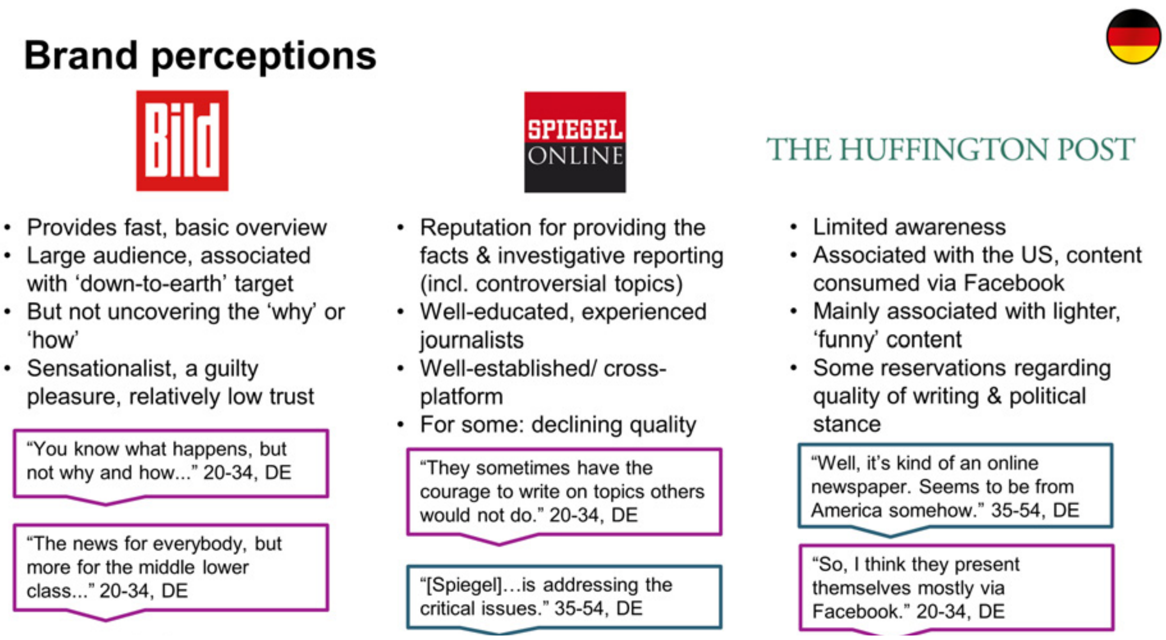

Figure 17: Brand perceptions – Germany

5.4.2 Spain

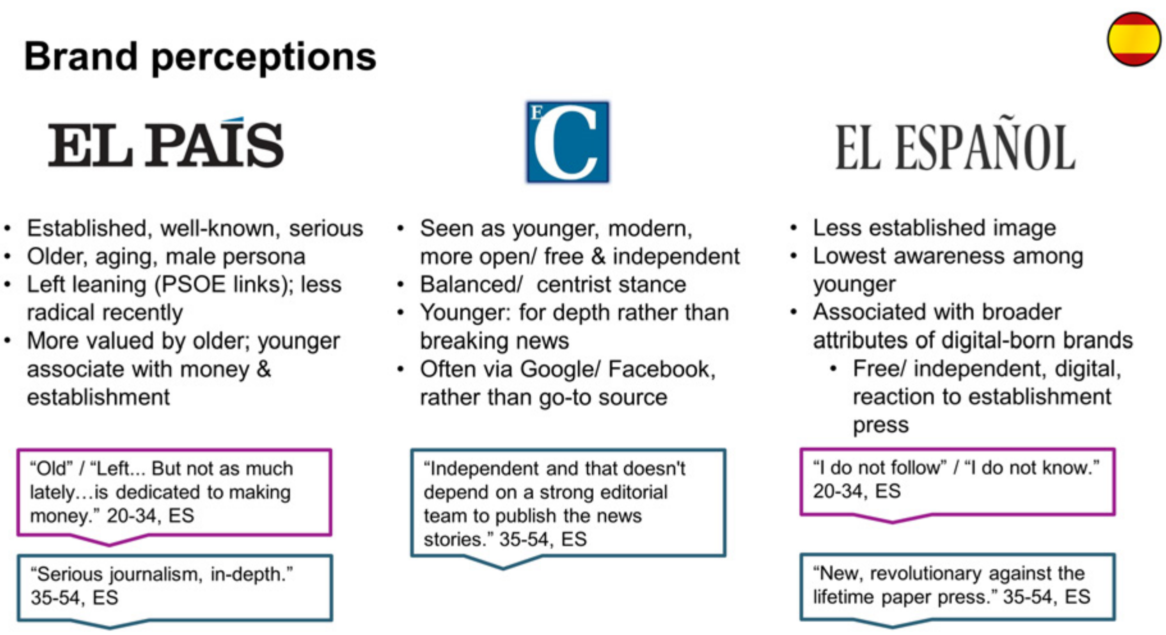

Figure 18: Brand perceptions – Spain

5.4.3 UK

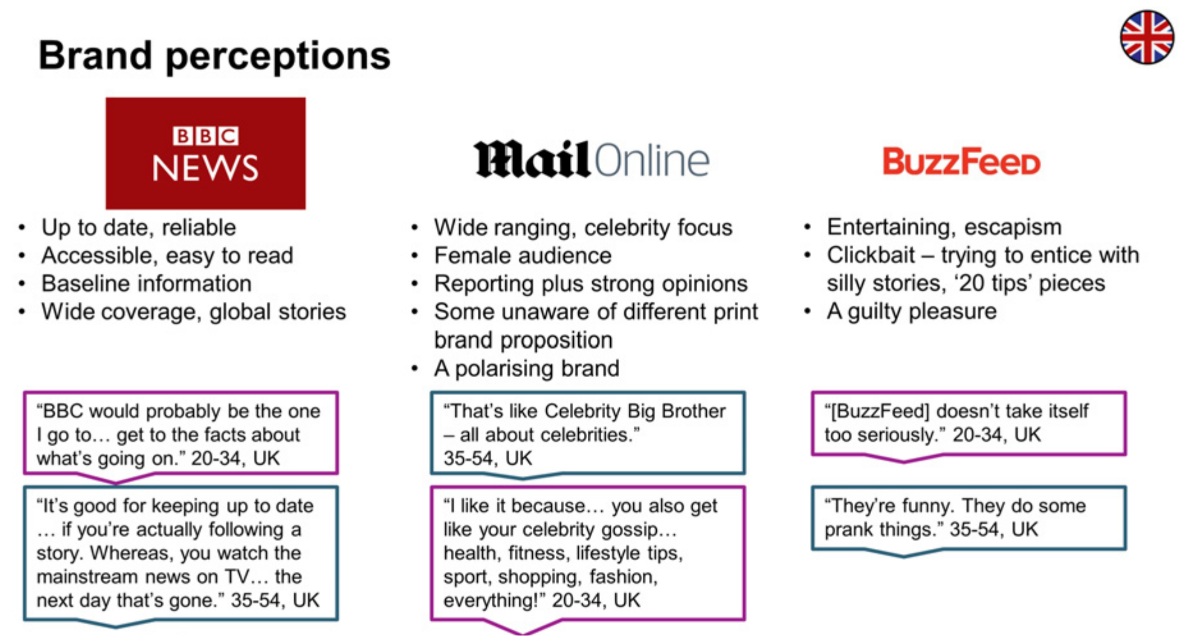

Figure 19: Brand perceptions – UK

5.4.4 United States

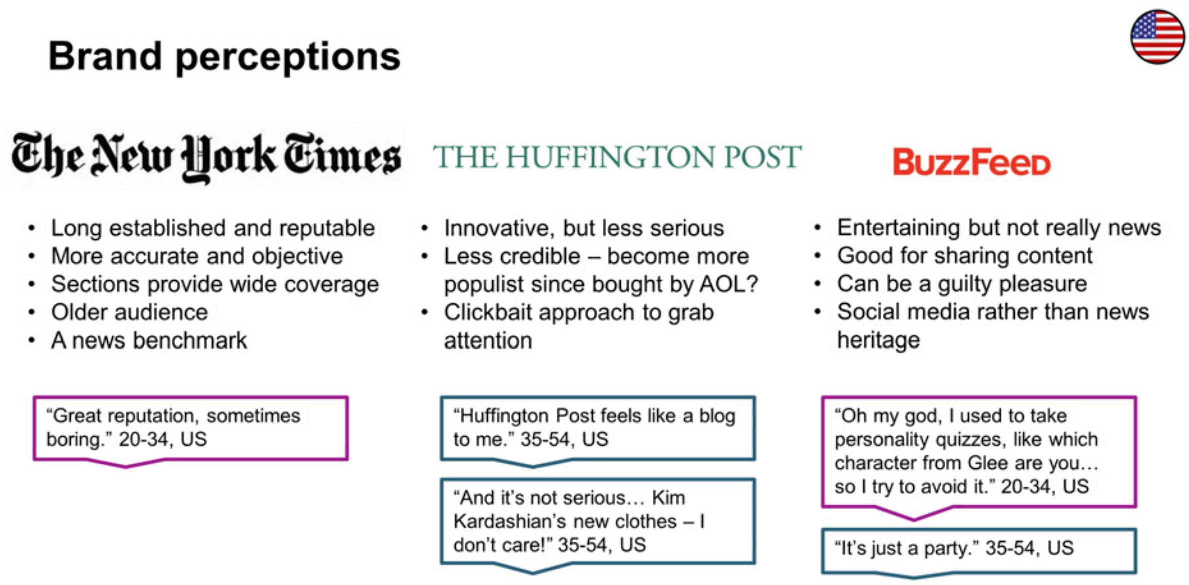

Figure 20: Brand perceptions – United States

6 Trust in news

6.1 Introduction

This chapter delves further into participants' perceptions of trust and, in particular, the building blocks of trust in news. First, the chapter explores participants' views on following an ongoing, complex, and highly emotive news story – the refugee crisis – and how they decide what to believe and trust in the news media. Secondly, building upon examination of a specific story, participants' more general foundations of trust in news will be unpicked and detailed.

6.2 Summary of key findings

- Trust in news is complex and multifaceted, and is founded on considerations of specific news **content**, news **organisations**, and engagement with the **plurality** of sources available
- Trust in news most readily associated with various aspects of the news content offered. In particular, trust stems from the perceived **accuracy**, **impartiality**, and **tonality** of the news product:
    - Accuracy: Content more likely to be trusted where seen as factual and correct, and based on thorough research and checking.
    - Impartiality: Trusted content associated with balanced and rounded views, with editorial responsibility guarding against sensationalism and vested interests.
    - Tonality: The format and tone of news content can help foster trust. Images and video can deliver more unmediated coverage and a direct connection with events. Similarly, written text can be absorbing and immersive, with the written word conveying authority.
- The credentials of news organisations and particularly their perceived **capability** and **experience** were central to inspiring trust in news:
    - Capability: News content more trusted when delivered by credible news organisations with extensive expertise, reach, scope and skilled journalists.
    - Experience: Trust in news linked to the perceived track record and reputation of

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news brands, and how familiar they are to consumers.

- Again, relating to news organisations, trust was seen to be entwined with the relative **integrity** they conveyed:
    - Integrity: Belief and trust in news fuelled by perceptions of the values that guide news organisations – how they operate, and the qualities and characteristics that underpin their behaviour.
- Finally, trust in news was founded on the availability of and consumers engagement with, a **plurality** of news sources:
    - Plurality: Trust in news fuelled by the plethora of perspectives available across a variety of news sources. However, consumers have responsibility to be proactive (especially in relation to serious news stories), and to compare, contrast and corroborate news stories with reference to different sources.

6.3 Examining the refugee crisis for trust factors

The discussion of trust in news content was initially anchored in participants' perceptions of a current news story – the refugee crisis. Participants were invited to share their feelings on the story, and to explain how they were currently following it and to reflect on their choices of particular news brands and sources. The refugee crisis was specifically selected due to its global significance, which allowed participants' responses to be compared across the four countries covered by the research.

The vast majority of participants had at least some level of engagement with the refugee crisis, and were struck by the story's blend of human tragedy and political difficulties. With the long-running and multifaceted nature of the story often making it difficult to make sense of, they drew on various strategies to gain accurate and trusted perspectives,

Most participants, and particularly the avid news followers, reported drawing on a variety of sources to corroborate and better understand unfolding events. While both traditional and digital sources were cited, many appreciated the speed with which online sources allowed coverage to be compared and contrasted. Many participants recognised the benefits in triangulating reporting from different news brands to help achieve what was perceived as a more balanced and validated view of often uncertain events.

> *"It's like getting The Sun or The Daily Mirror. If you see one story and you see it almost identical in both papers you can trust it."* (35-54, UK)

While triangulating perspectives was valued, several participants also gravitated towards specific news brands to deliver accurate and trusted coverage of the refugee crisis. The older participants were most likely to highlight trust in well-established print and broadcast brands. They cited the legacy such brands had in covering similarly complex stories, with confidence stemming from previous good experiences and established track records. Some participants also placed greater trust in brands that were considered to focus on providing facts rather than more politically oriented narratives.

> *"Like I would never to go BuzzFeed normally to read about immigration…I don't associate BuzzFeed with like hard news you know. And clearly they're reporting on it and that's fantastic. Because hopefully they're getting that story out to people who might not otherwise be interested in it you know. But I would go to the [New York] Times or CNN you know maybe NPR, you know. I associate that story with like really established strong [brands]."* (35-54, US)

By contrast, a few of the younger participants appreciated the role of emerging news brands and platforms in conveying a more direct view of unfolding events. Social media brands such as Facebook allowed users to follow people who were 'on the ground', and able to give eyewitness perspectives. For example, a participant in the UK followed a friend on Facebook who was volunteering in the Calais migrant camp, and valued the personal and unfiltered perspective offered.

> *"I think a lot of news sources were really, really vile about this, in the beginning particularly. And so I think I went to a lot more independent news sources who, like you say, there were a lot of people that actually went to these places…So yes, first-hand news from the people that actually went there was important to me."* (20-34, UK)

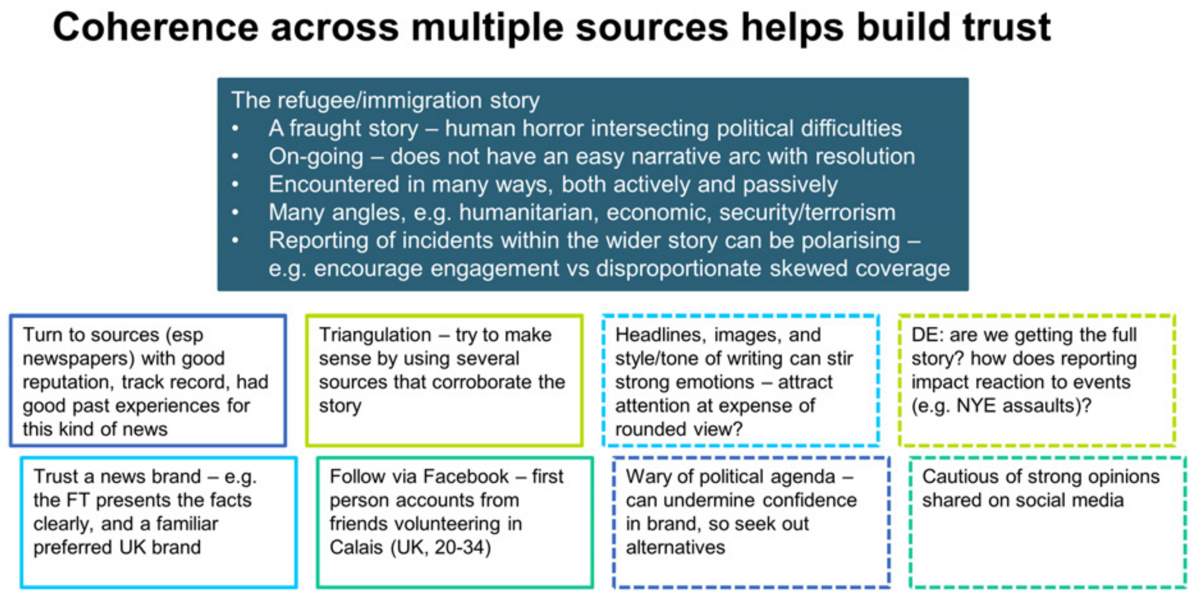


Figure 21: The refugee crisis and trust in news

Discussion of the refugee crisis also helped identify factors that could undermine people's trust in news content. For example, many participants expressed unease at reporting that was overtly emotional and attention-grabbing. They considered overly emotive headlines as inappropriate for such a serious topic, and they indicated a brand's desire to attract audiences and spark reactions rather than delivering a neutral gaze.

> *"When a news story is a bit more emotional or political I tend to filter a lot of the news articles, like the news sources out. So I wouldn't go to somewhere like BuzzFeed for like the refugee crisis or Daily Mail or something like that."* (35-54, US)

Similarly, some participants had reservations about the accuracy of coverage provided by brands that were strongly associated with specific political leanings. Indeed, while some sought reassurance in perspectives that reflected their own world view, others used such brands with caution and proactively pursued comparisons with other sources.

> *"Yes…Fox News online would be the last place that I would go to read about you know Syrian refugees. Because I feel that you know the reporting would be heavily biased and perhaps inaccurate. Because of commercial interests by the owners of that news corporation and its viewership and their beliefs. So I hate to*

> *say that. It's kind of a sad state of affairs but that would be the last place I would go to."* (35-54, US)
>
> *"Because in the case of the Guardian and the BBC which I see as one and the same, they have social engineering. They have an agenda here and it's very obvious to me. So I listen to that, hear that and then I go and find other sources to find out about it."* (35-54, UK)

The refugee crisis was arguably most salient to participants in Germany, with concerns over inward migration high on the news agenda. The vast majority of participants had followed reporting of the volume of migrants entering the country, and the associated social and economic consequences. In particular, they referenced the highly charged debate around the alleged involvement of migrants in sexual assaults during the New Year's Eve celebrations. Amidst such tensions, several participants doubted whether they were receiving the full story from news outlets. For some, this was associated with government interference to mask the full scale of the problem, while others pointed to justifiably cautious reporting in the absence of concrete, verified facts.

> *"Well, I think…especially now having this 'crisis' with Merkel and the refugees...of course, it is important and it is correct…they have to report carefully. Because there are certain people in this society who would go mad otherwise. And, of course, you don't want them to go mad and… of course, for this reason they really report carefully. That's what I believe. And I think that is just right."* (35-54, Germany)
>
> *"I think the most trustworthy or reputable is Süddeutsche. Because first of all it's informative and it does not immediately represent an opinion…like, for example, Bild reports "Care endangered"…that causes panic. You immediately think…oh man, something is not working and that's negative, in my opinion."* (20-34, Germany)

Finally, several participants – and particularly the older and less tech engaged – expressed caution regarding the coverage of the refugee crisis on social media. However, their concerns primarily focused on the comments generated among social media users, rather than content shared by established brands. Their concerns reflected broader misgivings surrounding news on social media, with the emotive nature of the refugee crisis seen to readily inspire highly charged and often unsavoury comments and debate.

6.4 What is trust in news content?

Building upon discussion of the refugee crisis, participants were invited to deliberate more generally on the elements that comprised trust in news content. The prominent facets of trust in news that emerged are summarised in the diagram below, with similar aspects clustered by colour. The elements identified included the perceived accuracy and impartiality of the content delivered, through to the capability of particular news organisations and the plurality of perspectives available.

Figure 22: Elements of trust in news content

6.5 The pillars of trust in news content

Having grouped similar aspects of trust in news content, the model below was developed to better understand and visualise the building blocks of participants' trust.

Firstly, participants identified three broad elements which related to the news content or product delivered by news organisations – accuracy, impartiality, and tonality. In addition, trust was closely related to characteristics of specific news organisations and, in particular, their perceived levels of capability and experience. Moving beyond the scope and news-gathering credentials of news organisations, their overarching values – or the integrity they conveyed – were pivotal to trust in the content delivered. And, finally, the availability of a plurality of sources was influential in inspiring trust, with participants recognising an important role for themselves in actively seeking out different perspectives to corroborate stories.

The following sections provide a more detailed overview of these four tiers of trust in news, with consideration of each of the building blocks identified.

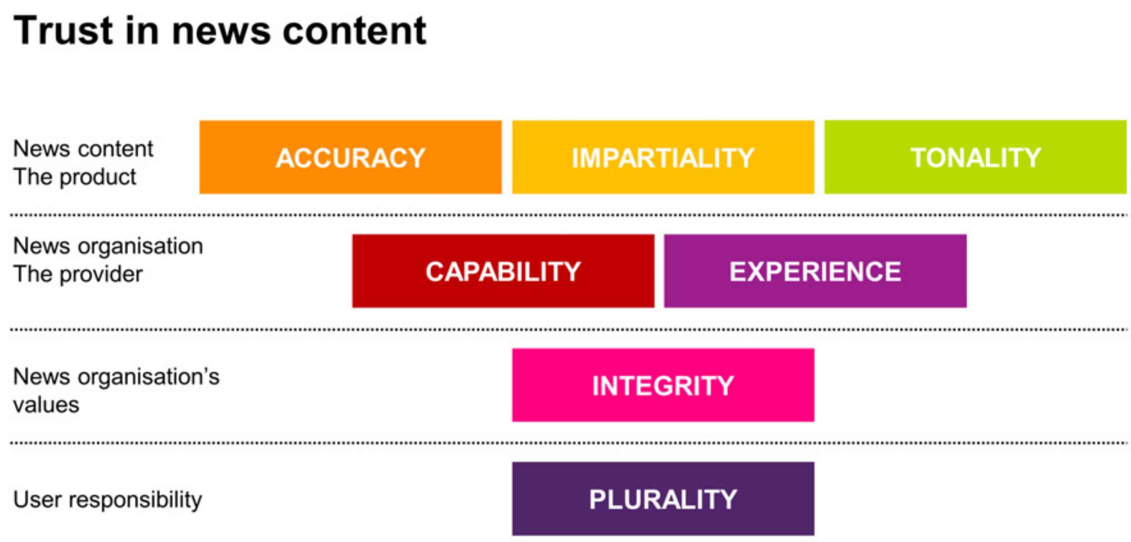


Figure 23: Model of trust in news content

6.5.1 Accuracy, impartiality, and tonality

The majority of participants most readily associated trust in news with various aspects of the news product offered. These included the perceived accuracy and impartiality of the content, along with the tonality of its presentation and delivery.

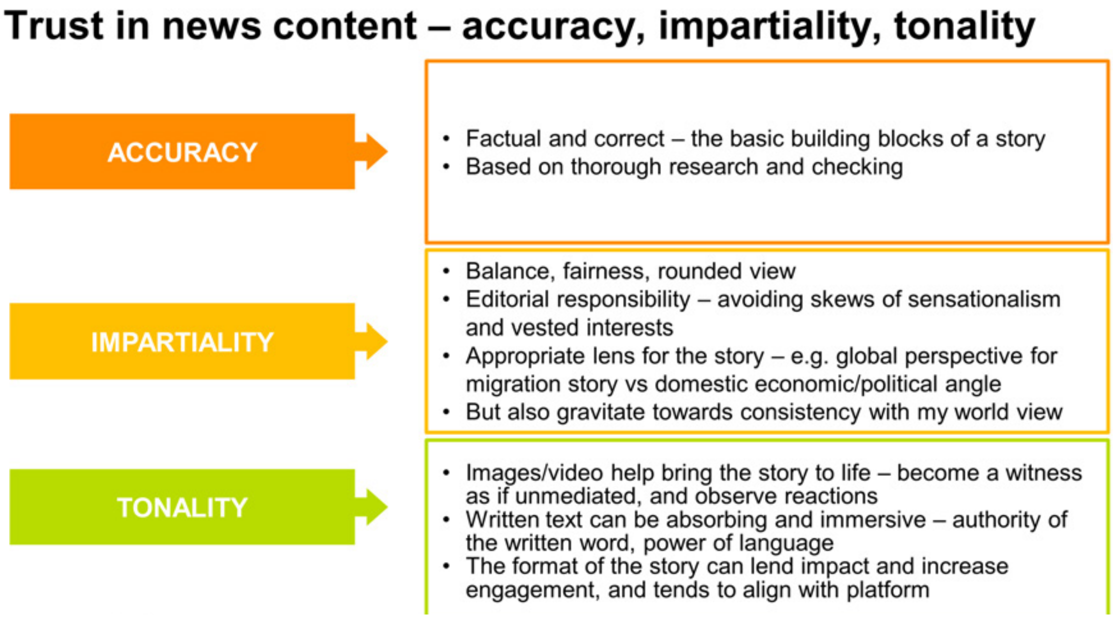


Figure 24: The building blocks on trust in the news product

Accuracy was universally considered to be the foundation stone of trustworthy news coverage. Participants strongly associated trust in news with effective news gathering and the provision of correct information and facts. Indeed, regardless of subsequent interpretation and analysis, the accuracy of information upon which stories were based was a pre-requisite for inspiring trust.

> *"Well, I'm very careful with things like comments on n-tv like Heiner Bremer. And that's a very personal point of view. Or any comments like on Tagesthemen online where you can also voice your opinions…these comments are very personal. So I'm more interested in mere facts. I want to have facts and nobody's opinion."* (35-54, Germany)

Moving beyond the raw facts of news, the majority of participants highlighted impartial or balanced coverage as key pillars of trust. They typically placed greater trust in content that highlighted both sides of the story, and avoided reporting that was deemed to be sensationalised or unduly skewed. Nonetheless, while an overarching sense of fairness was highly valued; several continued to place significant faith in coverage and sources that reflected their views.

> *"I'm not impartial, but I want the news stories to be impartial. I'm not apolitical, I've got an orientation, but I don't want others influencing me."* (35-54, Spain)

Many participants also cited elements relating to the tonality and presentation of news content as key indicators of trust. For example, images and video from unfolding events can help inspire trust by delivering a ‘first-hand’ view. Similarly, the written word can convey a natural authority, with trust embodied in the journalistic and detailed credentials of the format.

> *“I like it better when it’s not those crazy headlines like I’m just looking at these sources and I’m thinking well BBC doesn’t really do that but they also are more globally focussed so I just don’t read it as much but like NPR I get weekly emails from NPR and they don’t do the clickbait thing at all but they also are not profit so that’s probably why but I’m often more interested to click through and read the article when you actually know what it’s going to be about.”* (20-34, US)

6.5.2 Capability and experience

In addition to aspects of the news product, the credentials of news providers were seen as central to inspiring trust in news.

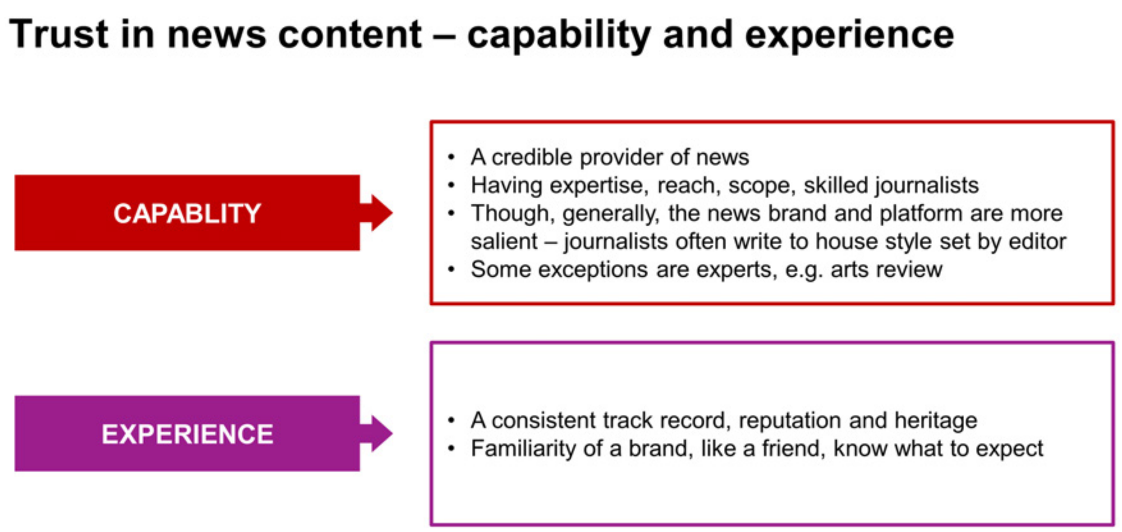


Figure 25: Trust in the news organisation

Firstly, participants cited several aspects relating to the capability of news providers that helped deliver trust in news content. These included the scope of news organisations, with trust reinforced by a provider’s perceived expertise and reach in gathering and disseminating content. For example, well-established news brands were often trusted for world news due to their broad footprint, with skilled journalists and expert commentators spread far and wide.

> *"El País probably has the money to pay a reporter who they have right there doing it all day, and maybe El Confidencial doesn't and has to base its sources on what they can get from there through another medium."* (20-34, Spain)

> *"You get the impression the [Spiegel] journalists are very close to what's happening. And Bild is just yellow press. Sensation. Very loud words. And then usually the articles themselves are not that well written but the headline is outstanding. And Spiegel is also represented on television, online… as magazine…for many many years."* (20-34, Germany)

In addition to capability, many participants placed trust in news organisations based on their perceived experience and track record. Indeed, just as trust in personal relationships was seen to be based on consistent positive experiences, this was reflected in perceptions of news brands. Where brands were considered to have a positive track record and strong heritage, these facets helped bolster participants' trust in the content they delivered.

> *"Based on how renowned they are, because you've heard a lot more from El País than El Español or El Confidencial... I trust them more because I've known them all my life."* (20-34, Spain)

> *"But it's more trusted. For me, that's my opinion. I would rather believe something from BBC News than from BuzzFeed for instance. I don't know BuzzFeed at all, I don't know."* (35-54, UK)

6.5.3 Integrity and plurality

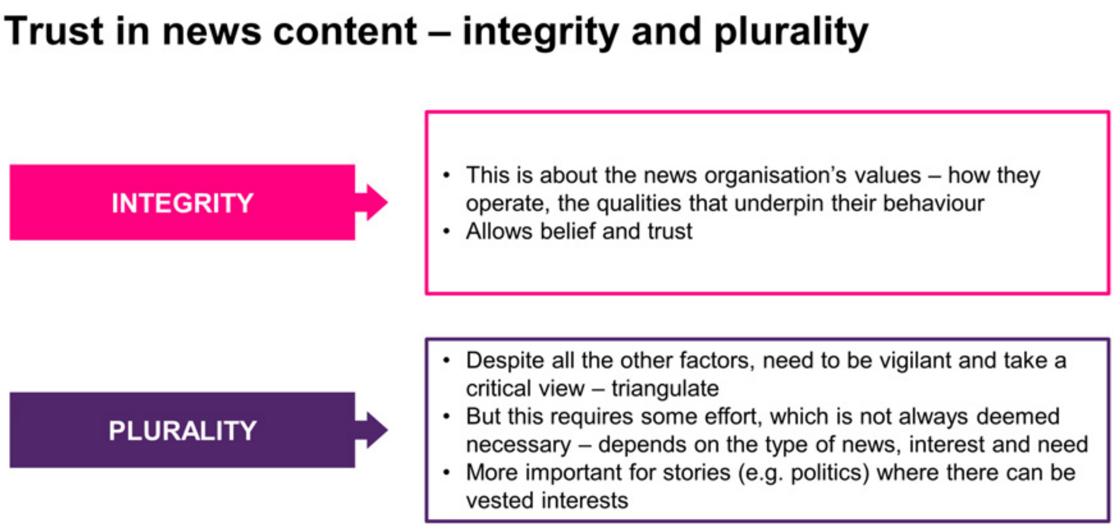


Figure 26: The role of news organisations' values and user responsibility

In addition to the more readily quantified elements such as capability and experience, participants highlighted the influence of the perceived integrity of news organisations. Where news organisations were seen to be founded on and guided by creditable values this encouraged belief and trust in the news content delivered.

The final element underpinning trust in news related to the plurality of news brands available. In particular, the availability of different brands and perspectives was seen as key where vested interests could influence the reporting of stories. However, some participants did recognise that to fully extract value from the range of sources available, consumers needed to adopt a critical gaze and be proactive in comparing and contrasting different viewpoints.

> *"I was saying it in the sense that it [trust] doesn't exist in this field, now we are all much more critical and we all look for many more different opinions, we want to see various perspectives…you trust yourself."* (20-34, Spain)

> *"Well, I like to compare, for example… the news on different TV channels. Sunday evening or Saturday evening I watch Tagesschau and also sometimes I check the appropriate news on CNN or ARTE."* (35-54, Germany)

"You've got to read a few sources to really come up with a true story of things. I think. I mean if you want to double check that what you're reading is true." (35-54, US)

KANTAR MEDIA

7 News in distributed environments

7.1 Introduction

This chapter investigates people's usage of and attitudes towards news consumption in distributed (offsite) environments, including aggregators and social media. For both aggregators and social media, the relative levels of trust in news content will be considered, alongside the role of news brands. Finally, in relation to news content curation, participants' perceptions of the relative pros and cons of editorially and algorithmically selected content will be examined.

7.2 Summary of key findings

- Brands have varied visibility in distributed environments
    - News brands are important in aggregators, lending credibility to both the news and the aggregator.
    - Where news is actively followed in social media, news brands are likewise important, although their visual prominence varies across different social media brands.
    - Social media works well for breaking news, which can be provisional and raw – the trust and authority of news brands is of less importance at this initial stage, although they play a role if the story is actively pursued.
    - News can also be received by serendipity in social media – in platforms where cues to the news brand are not prominent the social media brand itself can develop trust over time, with little credit going to the traditional news brands.
- The importance of the sharer of a news story in social media varies
    - The sharer's role can be somewhat functional – generally, the topic/ headline are the priority.
    - However, where there is a connection between the sharer and the news, some credit goes to the sharer in that exchange.
- Views about editors versus algorithms are mixed, and some are unaware of the latter

- Typically, those who are more tech savvy have a preference for algorithms, which they consider to be more independent and to allow a greater variety of news topics as well as plurality of sources.
- Others, though, (typically older) appreciate the traditional role of an editor in determining what is important, and take comfort amidst the overwhelming quantity of content in the digital environment.
- There are also some (especially in Germany) who have concerns about privacy and the use of their personal data.

7.3 Aggregators

Across the four countries covered by the research, awareness and use of news aggregators was generally highest among the younger and more tech engaged. However, a few of the more avid news consumers among the older groups were also familiar with and used aggregator services.

Awareness was highest for news aggregator services from well-established internet brands, such as Google, Yahoo, and Apple. By contrast, use of more recently established services such as Flipboard was mostly limited to the younger and more tech engaged. A few participants were aware of services such as Apple News that had been preinstalled on their smart devices, yet had not actively engaged with them. Indeed, participants' use of aggregators was higher for website-based services (e.g. Google News and Yahoo News) than apps that required the extra steps of being downloaded and personalised (e.g. Flipboard).

Those using news aggregators highly valued them for providing a convenient and tailored news experience. They appreciated being able to either search for or select stories of interest, and the ease of quickly comparing and contrasting content from different providers. In particular, the more avid news followers highlighted the role of aggregator services in meeting needs to triangulate perspectives and corroborate developing news stories. Several participants, and particularly those using app-based aggregator services, highlighted the benefits of the customised experience offered by pre-selecting specific news brands and topics of interest.

> *"It gets a variety of things like I'm interested in certain topics that I probably wouldn't find or I'd have to search for it myself so it's like a one stop shop of things that interest me."* (20-34, US)

> *"Well you know if you're watching the morning news you're kind of at the mercy of whatever they show you. With apps you can kind of go on like Apple News for example and say I'm interested in CNN but not Fox News and I want to see that feed versus another one and so you know you can either set those apps to alert you when something happens or you can just go on them at your own leisure, in your own time."* (20-34, US)

> *"I use a news aggregator called Menéame...The stories which the users consider to be the most interesting are the ones which make the headlines. Menéame doesn't have a strong ideological bias, there's a bit of everything in terms of politics and a lot of technological and ecological news stories."* (35-54, Spain)

By contrast, some participants who were less familiar with news aggregators struggled with the concept and failed to see the potential benefits offered. They often had relatively entrenched news habits, and were discouraged by the perceived effort in setting up and learning how to use such services. In addition, several cited reservations about a potential content overload that could be triggered by using an aggregator.

The majority of participants – including users and non-users of news aggregators – had hitherto given little or no consideration to the role of algorithms in generating content selections. The users of news aggregators principally concentrated on the perceived benefits of such services, and mainly associated content results with what they had searched for or pre-selected. (Participants' perceptions of editors vs. algorithms in distributed environments are discussed in more detail in Section 7.5 below.)

In general, the vast majority of news aggregator users valued the presence of well-established and familiar news brands. Most had given little or no thought to how much they trusted aggregator brands as news providers, with trust predominantly stemming from the presence of familiar news brands. Furthermore, in the case of aggregators from established internet brands such as Google and Apple, the services benefited from existing perceptions of the aggregator brand and the specific news brands that content was sourced from. Similarly, among those using more emerging services like Flipboard, the presence of established news brands offered confidence and familiar reference points, with little thought given to the influence of the aggregator brand.

Trusting in news via aggregators can be straightforward

Aggregators are not familiar to everyone, esp among older and less tech engaged
- Some struggle with the concept and not given any thought to algorithms
- Not all aggregator brands are known

Aggregators provide convenience
- Allow tailoring of news provided
- Provide plurality of sources as well as range of stories

Established news brands provide trust
- Aggregators capitalise on this
- News brands' credibility enhance the aggregator's credentials

Judged through trial – not all equally good
- On reflection, some question how the aggregator makes the content selection
- (ES: Google News has been shut down due to issues of remuneration of news brands' content)

Figure 27: Trust in news via aggregators – in summary

7.4 Social media

News following via social media (e.g. Facebook, Twitter) was generally more complex than through aggregators, with participants describing both active and passive contexts of consumption. Those specifically using social media for news highlighted more active consumption, where specific news brands were followed with content often shared and discussed with others. By contrast, most participants described more passive news following via social media, where content was encountered more unexpectedly when shared or commented upon by other users.

In relation to news brands, these were more likely to be noticed when participants had specifically chosen to follow particular brands. Where they had actively followed news brands, recognition and standout was fuelled by users' existing connections with the brands and the expectation that content would appear on their feeds. Where content had been shared by others, particular stories and headlines were likely to achieve more initial prominence than the associated brands.

Similarly, where participants had followed specific news brands, their trust in the content provided was founded in their existing perceptions of and familiarity with the brands. Conversely, where friends and contacts had shared stories, participants also had to consider their trust in the sharer and their motivations for sharing the content.

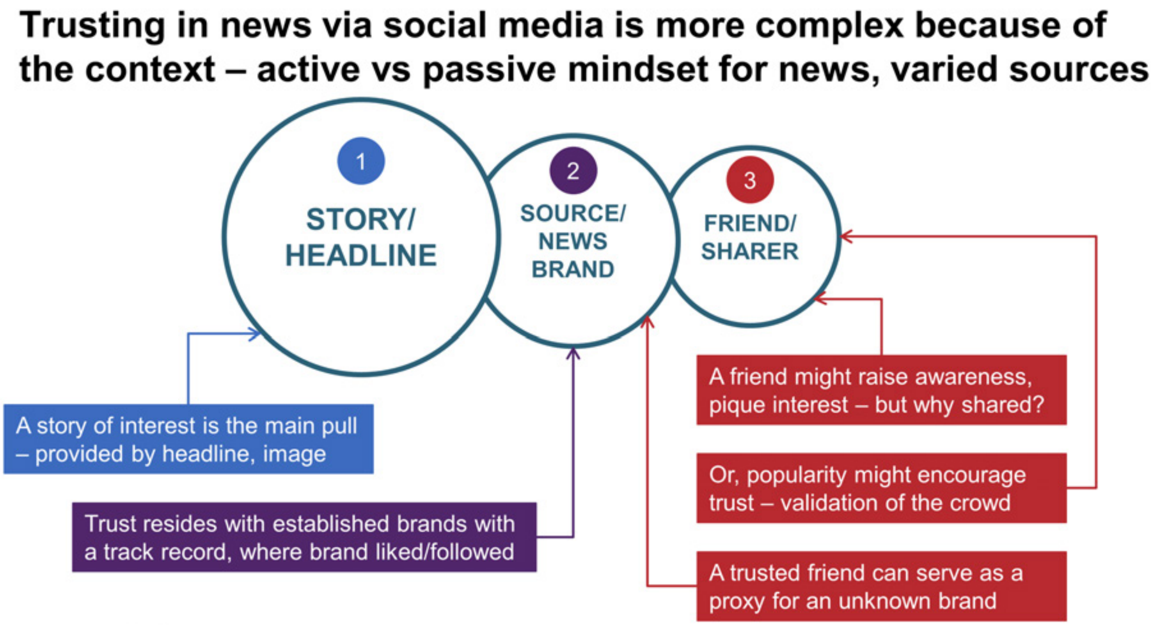


Figure 28: Consuming news via social media

With several participants concerned about the veracity of news on social media and the heated comment generated, familiar brands signalled accuracy and enshrined greater trust. Nonetheless, for more passive users and particularly the younger participants, there were indications that the presence of specific news brands could become less pivotal as social media becomes a more familiar news environment. Furthermore, over time social media platforms have the potential to become more credible and trusted destinations for news, with less recognition going to the established news brands providing the content.

> *"Those of us who have the tradition of those brands and are familiar with some of them, yes, but the younger people who are starting to use social media never look to see if it's ABC or El País, they look at it on social media channels and that's it."* (20-34, Spain)

Trusting in news via social media is more complex

News can arrive in different ways
- From followed news brands – chosen and expected
- From friends, who might/might not be trusted – more serendipitous

Credit vested in the news brand, at least initially
- News brands provide credibility and trust, esp for those actively using the platform for news
- News brands also useful signals of accuracy amidst risk of misinformation and propaganda
- However, first-hand accounts and citizen journalism competing/complementing news brands
- Content from news brands also passively, incidentally received – over time the platform can become a credible and trusted destination, with less recognition going to the brands

News brand not always very prominent in social media platform
- In Facebook, the news brand is recessive and tends to be secondary to the headline and image
- But has a mental presence if followed, and appears in feed
- Brand more prominent in other platforms, e.g. Twitter

Figure 29: Trust in news via social media – in summary

7.5 Editors vs. algorithms

As part of the exploration of news in distributed environments, the research explored participants' views on the curation of news content. In particular, participants weighed up the relative advantages and disadvantages of having content chosen by editors and journalists, versus more algorithmically generated selections.

Among a research sample of active news followers, the majority had previously given little or no active consideration to the pros and cons of editors versus algorithms. However, when prompted, most participants were able to identify and explain their preferences for algorithmically or editorially generated news content selections.

7.5.1 Algorithmically generated selections

Most participants – and particularly the younger and more tech engaged – expressed a preference for algorithmically selected news content. They particularly valued the perceived independence of algorithms, which most considered to be less influenced by political and editorial agendas than journalists. In addition, they highlighted the personalisation offered by algorithms, where content was selected and presented based on their previous consumption habits. By contrast, while many of the older and less tech savvy participants had encountered advertising content reflecting their previous browsing habits, they had not observed a similar influence on the news content they were presented with. Some participants – especially those using news aggregator services – thought that algorithms helped introduce them to a broader range of content and brands based on their interests and preferences.

> *"I'd be more inclined to trust an algorithm that takes from a full range rather than one editor. I think that one editor could be exposed quite quickly."* (20-34, UK)

> *"You don't have to search for news. The news is put together according to what the algorithm thinks that I might be interested in. I do not have to search myself. The suppliers inform me. Cleverly. That would be a benefit. They know exactly…well, this person is interested in economy…the supplier with the latest economy news even though something has already happened in the sport section. That'd be clever for it to know in advance what my interests are."* (35-54, Germany)

Nonetheless, several participants – including some of those favouring algorithmic selection – cited potential disadvantages. For example, on a practical level, they mentioned instances where algorithms were not seen to work well, and generated seemingly random selections that failed to reflect their interests.

> *"Google News spits out some really weird ones, so I don't really use it much."* (20-34, UK)

Delving deeper, a few participants expressed concerns that as a result of being personalised, algorithms could result in them missing out on alternative news sources and perspectives. However, for most participants, the potential 'filter bubble' effect of algorithms only sparked concerns when the possible downsides were presented for their consideration. Similarly, a few participants highlighted the potential disadvantages should algorithms by unduly harnessed by news providers to channel their agendas, rather than for delivering content that matched consumers' preferences and habits.

> *Anti-algorithm: "Is it a little bit claustrophobic in there? It's just like you're getting what you want. Maybe it's nice to get things that you wouldn't necessarily ask for?"* (35-54, UK)

> *Algorithms: "Whoever pays them the most to pick their story and put it forward is who's going to get it. That's my theory…People got to make a living."* (35-54, US)

Several of the older participants – and especially those in Germany – had reservations about the use of their personal data to feed into algorithmic selections. These reflected wider concerns about data security and privacy in online environments, with prominent mentions of data potentially being used for marketing purposes and the targeting of advertising. In addition, reflecting perceptions of news aggregators, several of the older and less tech engaged participants thought that algorithms could produce a content overload that would be difficult to navigate.

> *"Yes, and someday…your data is sold and the purchaser may get a picture of you and each single one of us…what you're interested in…who you are."* (35-54, Germany)

> *"Well, I'm not sure. I'm not sure whether the algorithm will include an advertising factor. So every time you enter an address that they calculate it in a way that the according advertising will be shown to. The web portal of the news magazines isn't that advertising-oriented as this computer-controlled algorithm thing."* (20-34, Germany)

> *"Data privacy is always on my mind."* (35-54, UK)

> *"I turn my cookies off because I really don't like that feeling, that idea that things are being pushed upon me based on what I've looked at before."* (20-34, UK)

Generally, younger and tech engaged more open to algorithm

ALGORITHM	EDITOR
ADVANTAGES • Democratic, free of the agenda of an editor/ publisher • Provides tailored news selection • Possible to get much broader selection across range of brands	ADVANTAGES • Human expertise, making informed decisions about the news that is important • Provides a quality control • Provides more manageable selection • Feels more accountable • Intrinsic to newspapers – news heartland
DISADVANTAGES • Can produce odd results • Risk of filter bubble – limit exposure to sources, miss out on important news • Some uncomfortable about black box feel, risk of someone's agenda being pushed • Data concerns (esp DE), targeted ads	DISADVANTAGES • Agenda of editor or higher powers – political bias, other forms of bias • Risk of some news being filtered out

Figure 30: The pros and cons of algorithms and editors in the selection of news content

7.5.2 Content selected by editors and journalists

The older and less tech engaged participants accounted for the majority of those favouring editors over algorithms in the selection of news content. They were far more accustomed to the selection of content by editors and journalists, with most placing greater faith in human expertise than the less familiar digital alternatives. Editors and journalists were seen as ideally placed to select appropriate content, which was then delivered in manageable quantities and was easy to navigate and consume. In addition, a few participants noted the accountability under which editors operated, where specific individuals could be judged on how content was selected and presented. In this respect, several participants strongly associated editorial decision making with familiar and established print- and broadcast-born news providers.

> *"I'd prefer an editor because it would still give me a choice…and expose me to stuff… I wouldn't want it to just be confined to my current tastes."* (35-54, US)

> *"You can write to the editor if you've got a complaint or you've got a comment."* (35-54, UK)

However, there were also perceived downsides to the selection of news content by editors and journalists. The majority of participants recognised that content selections of editors could be unduly influenced by overarching biases in news organisations. For example, several cited the disadvantages of content potentially being given less prominence or even suppressed as a result of political or commercial considerations.

8 Future speculation

8.1 Introduction

Finally, having immersed in consideration of their current news habits and preferences, participants speculated about how they would follow news in future and the likely evolution of the wider news landscape. Prominent discussion themes included the platforms that would be used to consume news content in future, and the long-term roles for established and emerging news brands.

8.2 Summary of key findings

- A continued shift towards digital foreseen
    - More digital news following at the expense of traditional platforms. Still a role for TV and, to a lesser extent radio, yet a bleaker outlook for print.
- People are keen for established, trusted news brands to continue well into the future
    - They are largely unaware of the potential threat posed by social media and aggregators in the current business model.
    - They hope traditional players will be able to adapt to the evolving environment.

8.3 A continued shift towards digital

Across the younger and older groups, the vast majority of participants foresaw a continued shift from traditional to digital news consumption. Among the older groups, most associated this with a move from traditional broadcast and print formats to more news following via online platforms. Similarly, among the younger and more tech engaged, the dominance of digital platforms was seen as highly likely to continue, with potentially greater use of aggregators and social media for news.

> *"Social media much more for watching the news."* (20-34, Spain)
>
> *"Mainly online. But I think sources like television, radio…they'll always exist. For me… radio is on in the background and if possible…if time permits…I also try to*

watch the news on TV like Tagesschau at 8pm…I guess I'll do the same in five years. But in terms of print media…I hardly read that…and that will continuously become even less. And more focused on the online media due to the variety of it." (35-54, Germany)

"My personal view it'll be more online, print will reduce and social media, I don't know where that will stand. I think Twitter will continue to drive the conversation but I think just any of these sources will be online. And that would include TV on that, web TV for example. But I think ultimate print is going to go into like an afterthought. That's my view." (35-54, US)

Nonetheless, many participants – particularly the older – continued to envisage a role for broadcast news formats such as TV and, to a slightly lesser extent radio. As highlighted in Chapter 4 of this report, they pointed to the strengths of TV news, such as the effortless experience offered and the direct visual connection with unfolding events.

"I don't think TV will disappear. I think there needs to be someone to read you the news. That's important too." (20-34, Spain)

The majority of participants foresaw a bleaker outlook for print news, pointing to their decreased use of such formats and the financial pressures facing established print news brands.

"The written press will no longer exist." (35-54, Spain)

"They've [print newspapers] been in agony for 10 years and this will go on for another five years…Now you don't even get the free newspapers at the entrance to the underground station." (35-54, Spain)

Despite this, many expressed regret over the decline of print as they continued to value the experience offered. For example, several of the older participants highlighted the nostalgia value of print and its role in immersive weekend news consumption. Similarly, even among the younger and heavier online users, print news was valued for delivering a digital detox and break from an ever-increasing dependence on connected devices. A few participants hoped that print could have a future focused on more niche category offers and published less frequently.

"Printed media…might address to specific groups. I'm missing the factual stuff. To touch. To feel. The senses are no longer appealed to. I think print media has to get more and more specific or specialised. To address specific groups." (35-54, Germany)

"I personally think I would start in five years' time I'll be reading more print and reading less social media. But just simply because I've like started to kind of use less and less social media and technology because it just otherwise takes over your life. Like I've started reading again and it's great." (20-34, UK)

Foresee more use of digital, yet keen to see traditional, trusted brands survive

Continued shift towards digital foreseen
- More digital use at the expense of traditional platforms
- Still role for TV and, to a lesser extent, radio – but bleak outlook for print
- Regret over print's demise: nostalgia, weekend experience, digital detox
- Print may have future in more niche, specialist offer

Brands will continue to be important, with established providers needing to evolve to survive
- Widespread awareness of general economic pressures facing traditional brands
- But little awareness of revenue threat from social media & aggregators (except in ES – Google News)
- Minority don't care – not 'not my problem'
- Yet most value established brands – need to reinvent, follow models of digital-born brands
- 'Should' be greater revenue sharing/ payment for content from aggregators & social media
- Some value greater independence of potential rise of digital-born news brands; but don't yet have track record (experience & capability) of well-established, trusted brands

Figure 31: Future speculation – news platforms and brands

8.4 The future role and value of news brands

Almost all of the participants recognised a future role for news brands, and were keen to see well established print- and broadcast-born providers continue to deliver trusted content. While valuing traditional brands, several participants – especially the younger and more avid news followers – foresaw and welcomed a yet greater impact of digital-born brands. They highlighted the relative independence and neutral stances offered by digital-born brands, yet recognised limitations in terms of organisational capability and track record versus more established providers.

> *"I still think brand matters, I still think you go to the more reputable ones by far, I don't think that's going to change."* (20-34, US)

> *"Well I hope you don't say goodbye to the New York Times. It has a legendary history. But I think there's some magazines in the UK right now that have gone just online. I heard of one called the Independent I think. Did you hear that?"* (35-54, US)

The vast majority of participants were aware of the economic challenges facing established news brands amidst an ongoing shift from traditional to digital platforms. However, while falling advertising revenues were widely recognised, few participants appreciated the uncertainties facing traditional brands as a result of the rise of distributed environments.

Participants in Spain were most familiar with the threat posed by distributed environments, given the high-profile case of Google closing its news service due to legislation requiring aggregators to pay publishers for linking to content.

> *"The traditional ones have to plan to talk to Facebook, or 20 Minutos to talk to Facebook and tell them, 'If you publish this type of news, I get €X'."* (20-34, Spain)

Amidst an increasingly fragmented news landscape, many participants suggested that traditional news brands had to reinvent and embrace new business models to survive. While participants understandably struggled to suggest specific solutions to the challenges facing established brands, several thought that lessons could be learned from digital-native services. For example, brands such as The Huffington Post and BuzzFeed were seen to gain traction and thrive through links to distributed environments, and there was the potential for traditional brands to follow their lead.

> *"They'd have to adapt their business models to suit the new situation. Any business stagnates or doesn't look towards the next thing. How do they go about providing that particular thing which they do to more people or looking to expand or grow their business then they'll be overtaken by say for instance BuzzFeed, Huffington Post. How many newspapers have closed over the past few years?"* (20-34, UK)

"There are some newspapers which have gone over to being online, they have diversified in another way, and it works. I wouldn't like good quality journalism to cease to exist. If they're all aggregators, who is it that's doing the original journalism? And then you've got the large companies making profits as they become rich, that's not on." (35-54, Spain)

"I think the brand will always withstand any of the change. Once the brand is monetised to itself. You know which you can do through trademarks, copyright, whatever. Earn royalties on it. Then the platforms may diversify or disappear or whatever but if the brand's still shining the business is not under. It just it has to change its model." (35-54, US)

It should be noted that a vocal minority of participants simply did not care about the economic challenges facing traditional news brands. In particular, where they were not personally invested in and using brands that could be under threat, they failed to appreciate wider impacts such as on the plurality of sources available in the market.

Appendices

Appendix A: Essay – The Future for News Brands in an Increasingly Distributed and Fragmented World

Jason Vir and Andrew Dodds, Kantar Media

The rise of connected devices has fuelled increased following of the news via distributed environments, such as aggregators and social media. Indeed, the Reuters Institute *Digital News Report 2016* shows that just over a third of people in the UK use social media for news, representing a 75% increase from 2013.

Nevertheless, much of the news consumed via distributed environments still relies on content provided by well-established, broadcast- and print-born news brands. While distributed environments offer news brands increased reach and access to new audiences, there are concerns regarding a loss of control over content. This essay considers the future role for news brands in an increasingly multi-platform and fragmented environment. How worried should traditional brands be about these trends? And, at the heart of this, to what extent do people notice and value brands within distributed environments?

In exploring these questions, we will draw on qualitative insights from research conducted by Kantar Media to inform this year's *Digital News Report*.

The qualitative study covered four countries – the UK, US, Germany, and Spain – with a series of pre-tasked discussion groups allowing detailed investigation of people's digital news habits and preferences. Fieldwork in each nation was split between groups of younger and older participants, encompassing digital users of various broadcast, print, and digital-born news brands.

Perceived roles of platforms and brands

When considering the future for news brands, it is important to firstly explore current perceptions of the roles of platforms and brands in an already fragmented environment. While we researched users of digital sources, they readily identified roles for both traditional and online formats. However, in line with broader trends, the vast majority observed declining use of print and, to a lesser extent, broadcast TV.

TV and print were most valued for news by older and less tech-engaged participants, who pointed to traditional strengths of the formats. They strongly associated TV news with offering an effortless, curated experience, and a direct visual connection with unfolding events.

Print was valued for providing immersive, detailed news consumption with the written word conveying authority. In a multi-platform environment, print and TV news brands were recognised as having wider cross-platform roles. The vast majority of participants valued the tried-and-tested capability and reach of well-established brands in delivering accurate news coverage, regardless of the platforms used.

COMPARING THE VALUE OF DIFFERENT PLATFORMS – IN SUMMARY

TV	Easy, entertaining, packaged, available, visual
PRINT NEWSPAPER	Journalistic, essential, ritualistic, but not up-to-date content
NEWS WEBSITE	Up-to-date, live, convenient, news brand credentials, clickbait
SOCIAL MEDIA	Instant, effortless, interactive, mobile, but a minefield

Online news websites were seen to deliver up-to-the-minute coverage, blending the detail of print with the visuals of TV. Moreover, the online services of print and TV brands benefit from already well-established news credentials.

The distributed social media environment proved more divisive. While it was valued for breaking news and content from established brands, there were misgivings expressed over accuracy of information and over the heated comments and debate that were often generated.

News usage in a multi-brand world

Multi-platform use has been accompanied by a growing array of news brands, fuelled by the emergence of digital-born services. Consumers also expect traditional brands to work across platforms, with digital allowing perspectives to be efficiently compared across sources. Most participants claimed to use a repertoire of providers, rather than sticking to a single, reliable brand. However, the abundance of news brands risks overwhelming consumers, with individual brands often associated with specific roles and content types.

Initial awareness

The majority of participants had a go-to brand for learning about news stories and gathering key facts. These tended to be online services from favoured print brands and well-established broadcasters, with the BBC website a prominent example in the UK. Less avid news consumers often referred to headlines from email and internet brands to learn about news stories. Initial awareness among younger people often centred on social media, where breaking stories were shared or commented on by friends.

Verification and immersion

Several participants triangulated perspectives from a range of news brands to immerse in and corroborate developing stories. They were most likely to proactively compare sources when following serious and complex news stories, and particularly those where reporting could be influenced by political biases.

For example, participants frequently cited using multiple news sources to make sense of and to verify coverage of the refugee crisis. The story was particularly salient in Germany, with many seeking to compare sources to get a fuller and more accurate picture of unfolding events.

> *"I do that [compare sources] very often...for subjects that might be more controversial…I look at television, hear radio…get different impressions and then I make up my own mind. Not just blindly hear something."* (20-34, Germany)
> *"Well, I try to compare when, for example, Bild newspaper presents a headline...I'm quite careful. And then I check for what other sources such as Welt and so on…say about the same topic. I don't think you have to jump on every bandwagon."* (35-54, Germany)

Content types and day parts

News brands were also perceived as having specific roles relating to the type of news story and the time of day consumed. For example, brands such as MailOnline and BuzzFeed were prominent sources for celebrity and entertainment stories. Established print and broadcast brands were more readily associated with harder news stories, and those demanding greater immersion. Platform also played a role, with TV and print often favoured for greater immersion in the evening or at weekends, with digital formats allowing news to be consumed throughout the day.

In addition, digital-born brands, such as BuzzFeed, Vice, and The Huffington Post were mainly associated with consumption via distributed environments. Rather than visiting websites or apps directly, most people noticed articles linked to on social media or through aggregators.

While digital-born brands were valued for their independence and centrist stances, they were generally less likely to be visited directly than established providers. For example, in Spain, brands like El Confidencial and El Español provided important counterpoints to sources with perceived establishment links, yet were not widely used as go-to destinations. Most people gravitated toward brands with established news-gathering credentials for initial exposure before seeking out other perspectives.

Value and recognition of news brands in distributed environments

The qualitative research demonstrated that news brands play a valued and, in many instances, cross-platform role in today's fragmented news landscape. However, with news increasingly consumed via distributed environments, rather than by visiting brands directly, questions remain regarding future engagement. In particular, to what extent do people notice news brands in distributed environments? And what value is placed in news brands versus distributor brands?

Aggregators

Awareness and use of aggregators was greatest among more avid and proactive news followers, with the less tech-engaged least likely to appreciate their role and value. With consumers often keen to triangulate perspectives across news brands, aggregators provide an efficient means of doing this. The less tech-engaged typically failed to appreciate this and focused on the perceived effort of customising services and the possible content overload generated.

The news aggregators discussed broadly fell into two categories: highly customisable app-based services such as Apple News and Flipboard; and 'websites' like Google News and Yahoo News that allowed users to search by story or topic across multiple providers.

Brands were more likely to standout on customisable services, where users had specifically pre-selected news brands and categories of interest when registering. Within such environments, active news consumers expect to see pre-selected brands, which are often well-signposted in visually rich interfaces.

> *"It's [Apple News] going to filter the things that you're interested in. Going to filter the sources you trust as well."* (20-34, UK)

> *"And I also look at it [the news brand] if it's on Apple News, where the source is coming from? So if it's from legit sites like CNN or sources that I went through before, I usually click on them."* (20-34, US)

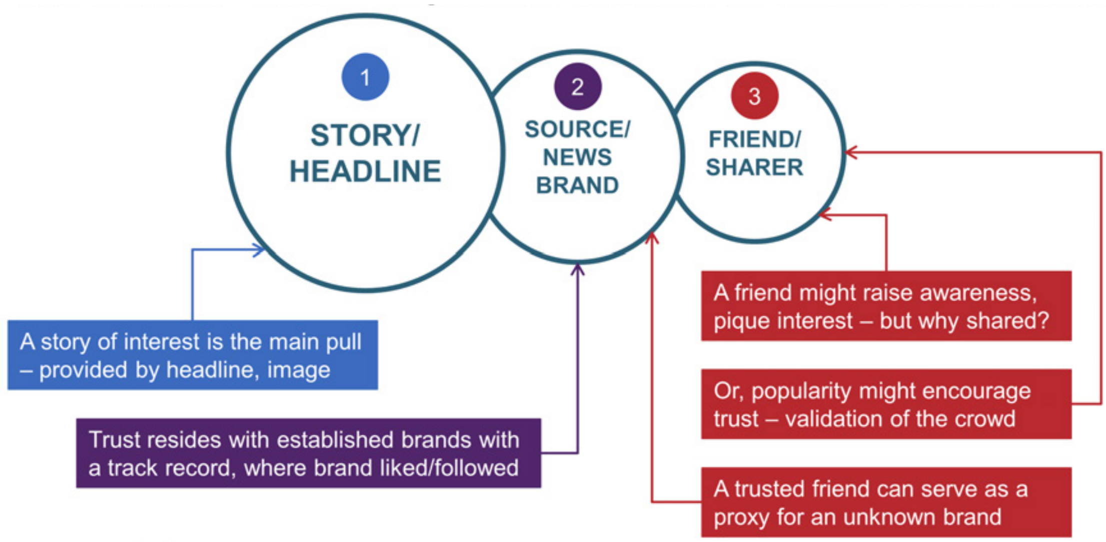
The role of brands in search-based aggregators is generally less clear. People typically search for specific stories of interest, and attention-grabbing headlines can outweigh brands. Brands can also be less prominent within text-heavy search results, and their importance can vary by the type of story. For example, recognised and trusted brands are more important when using aggregators to immerse in serious news stories, while headlines can be a bigger draw for lighter content.

> *"Oh the brand is the number one thing for me. So if I'm using an aggregator and I'm seeing the same topic several times I'm going to go to the brand that I know. I know this sounds like a commercial for the [New York] Times but it's usually the Times or the Washington Post or something like that. Something that I know."* (35-54, US)

Social media

The role and perceived value of news brands in social media is more complex, and depends on the active or passive news-following mindsets of users. As summarised in the diagram below, the role of news brands needs to be considered alongside the impact of headlines and sharers.

CONSUMING NEWS VIA SOCIAL MEDIA



With news generally not the main focus of social media use, specific headlines and accompanying images grab most initial attention. News brands are most likely to be noticed by users who have actively followed or 'liked' specific brands. People expect to see content from sources that they have followed, with recognition fuelled by their existing engagement with the brands.

> *"Newspapers on my Facebook page: I get things on my newsfeed from them all the time from certain news resources that I 'like'…I'm always seeing things on my newsfeed that I'll click on that way."* (20-34, US)

Moreover, when news brands are followed on social media, they effectively become both the source and the sharer of the story. This dual role delivers greater visual prominence for news brands, with users not required to further mentally filter content in relation to the friend or contact sharing the story. Indeed, where stories are shared by friends, users can primarily consider the person's knowledge of the topic and motivations for sharing, rather than dwelling on the brand.

People are also more likely to devote attention to brands where more serious news stories have been shared. In these instances, established brands add credibility to news consumed via social media platforms, and can be actively used for further immersion and verification.

> *"Firstly it would be the story, the interest. Is it something I'd like to read? And then I'd look at the source…is it from the BBC or Sky, or just a friend of mine that posted it?"* (35-54, UK)

> *"So first does the headline resonate with me? Is this something I would be interested in reading? If so, what's the source? Okay, then who shared this? Because they shared it for a reason. Why did they share it?"* (35-54, US)

Those passively following news via social media – and particularly the younger users – are generally less likely to notice the brands accompanying the stories shared. In addition, for lighter news, the reputation of the brand is less important than the attention-grabbing, clickbait credentials of the content.

> *"Those of us who have a tradition of those brands and are familiar with some of them, yes, but the younger people who are starting to use social media never look*

to see if it's ABC or El País, they look at it on social media and that's it." (20-34, Spain)

The prominence of news brands also varies across social media services. For example, in Facebook, news brands can be recessive and standout less than the accompanying headline and image. Nonetheless, brands do continue to have a greater mental presence in Facebook when they are actively followed by users. Brands can be more noticeable on social media services such as Twitter, where prominent brand logos and more active following enhance recognition.

Many participants, and particularly the more active news followers, highly valued the presence of well-established news brands on social media. With traditional news brands having earned people's trust over several years, they signal accuracy and credibility in an emerging distributed environment.

However, with content from news brands also passively and incidentally received via social media, over time the platform itself can become a trusted news destination with less credit going to the news brands. Indeed, younger and currently less avid news followers already place significant trust in the social media platforms that are their principal news destinations. It is essential, therefore, that established news brands maximise their prominence in distributed environments and continue to develop long-standing, valued relationships with consumers.

Conclusions

The qualitative research shows that established and trusted news brands play a valued role and that people want this to continue. However, the visibility of brands varies across distributed environments. News brands are important in situations where news is typically actively consumed, and lend credibility to both the content and the aggregator. In particular, news brands achieve greatest prominence in aggregators where active selections of brands and topics of interest are made.

Likewise, where news is actively followed in social media, brands are important, yet their visual prominence varies across different services. Social media works particularly well for breaking news, which can be provisional and raw. The trust and authority of news brands can be of less importance at this initial stage, although they play a valuable role in corroborating and immersing in stories if they are pursued further.

News can also be received by serendipity in social media. In platforms where cues to the news brand are less prominent the social media brand itself can develop trust over time, with less credit going to the traditional news brands.
As a result, it is crucial that news brands maximise standout and recognition within distributed environments. By heightening prominence, news brands are likely to gain credit for content in the long term and to appeal to both existing and new audiences. In this respect, traditional news brands face similar challenges to digital-born brands in converting exposure to content via distributed environments to audiences using them as go-to destinations for news.

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Appendix B: Prominent examples of news stories followed

Prominent examples of news stories followed

	Germany	Spain	UK	US
20-34	Bad Aibling rail accident Detection of gravitational waves Refugee crisis Container ship stuck in Elbe River New Year's Eve sex attacks	The Nóos case Esperanza Aguirre's resignation Negotiations to form a government Rita Barberá and alleged corruption in Valencia Zika virus	Labour party disagreements Storm Imogen Zika virus	Election coverage – Trump and Sanders Supreme Court Chief Justice Scalia died Flint MI toxic water disaster L train will stop running for a year
35-54	Refugee crisis Proposed €5k limit on cash spending Bad Aibling rail accident New Year's Eve sex attacks US presidential primaries	Detection of gravitational waves Death of 150k penguins in Antarctica Economic crisis Vitaldent fraud case	Trump China selling off its reserves Tories might go for a snap election Storm Imogen Rip off energy prices for pensioners	The election The immigration situation Politician Eliot Spitzer in trouble again Grammy Awards Scalia's death
	[Groups 15 Feb]	**[Groups 17 Feb]**	**[Groups 9 Feb]**	**[Groups 15 Feb]**

Figure: Prominent examples of news stories followed at the time of the research fieldwork – by country, and younger & older focus groups

Appendix C: Discussion guide

Objectives

The aim of the qualitative study is to explore issues of trust and value in an increasingly fragmented news environment, and specifically within more distributed environments

- Overall, to explore the drivers of trust, and mistrust, in news
- To explore what trust in news means and where it resides, exploring content (accuracy, relevance, impartiality), format, platform, brand, journalist, sharer
- To explore the role and strengths of different brands
- To explore the role of platforms in fostering trust in news in a more distributed and algorithmically driven environment
- To explore future implications and make comparisons across countries

Key questions:

- What are the drivers of trust and of mistrust?
- To what extent do people have trust in the media, in journalists and in specific brands?
- To what extent are political and commercial influence factors?
- In a digital world, where news is instantaneous and often raw, do people trust the news as much/differently? Is internet news considered less trustworthy and if so why?
- What is the role of brands in generating trust and confidence in news?
- How does trust work in a more distributed world such as social media?
- Is trust conveyed by the brand name, by a journalist or by the person who has shared the content?
- Do people even remember the brand/journalist that brought the news or does the platform get credit?
- Are different brands trusted/valued for different things (e.g. BBC for important news, Buzzfeed for entertainment)
- Do people have trust in algorithmically driven systems like Facebook or do they prefer the news to have been checked by editors and journalists?

Notes to moderator:

- *Trust in news is a complex issue. We want to tackle it by immersing respondents in the different facets of news, which should encourage a more informed discussion. The pre-task diary should help sensitise respondents and anchor the discussion in behaviour*
- *Try to follow the language used by respondents instead of media/marketing terminology*
- *This is what we mean by some of the terminology:*
    - *<u>content</u> = news article, news programme, news story, etc*
    - *<u>format</u> = the use of words/ images/ video to convey the news story*
    - *<u>platform</u> = the way content is provided – via TV, radio, printed newspaper, website, social media, web aggregator*
    - *<u>device</u> = smartphone, tablet, laptop or any other type of media technology that can be used to consume content*
- *Key sections are 5. Brands, 6. Trust, 7. Distributed environments*

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1. INTRODUCTION (5 mins)

- Introduction to moderator & Kantar/TNS
- Explain research: we're researching news and how people consume it nowadays
- Interested in your opinions – no right/wrong answers, want an open and honest conversation
- Confidential
- Recording audio/video, viewing
- Speak one at a time
- Mobile/cellphones off/silent
- Duration 2h
- We also want to capture some comments on camera that will be used to help bring our report to life – we'll do a short interview one or two of you at the end
- Check all have their completed pre-task

- Respondent introductions: first name, family status, occupation, interests

2. EXPLORING NEWS CONSUMPTION (10 mins)

Warm up and set a context to frame subsequent discussion. Ensure everyone speaks in this early stage to encourage a productive dynamic. Refer to diary pre-task when exploring behaviour to ensure discussion is rooted in real behaviour

- What news caught your attention over the past few days, why was it of interest to you
- How did learn about this news, how did you first became aware of it
    - Any follow-up (active), where, why
    - If you came across the story again (passive), where, how did you feel
- Briefly, explore a few examples in more detail
    - Draw out different platforms – TV, radio, newspaper, website, social media
    - Draw out different types of story – hard news topic (e.g. current affairs), soft news topic (e.g. celebrity/entertainment)

- Briefly, deprivation – imagine that all of a sudden there's no more news available…
    - How would you feel, what would you miss
    - Which platform would you miss most, why – how was the digital deprivation pre-task

3. DEFINING NEWS (5 mins)

Use this section to get everyone to think about what news is, and start them thinking about the characteristics of news beyond the content, so that they're primed to move into discussion of platforms and formats

- Use flipchart and hand out post-it notes
- What is news, how do you define news, what are its characteristics
    - If an alien arrived here, what would you tell it to look for, how would it recognise what news is
- Review as a group – explore topics, formats/platforms

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4. PLATFORMS AND FORMATS (15 mins)
This section explores news in terms of platform and format, with our main interest being to explore any differences in how respondents feel about traditional media vs social/distributed platforms. Look out for issues related to trust, which will be explored more explicitly later in the discussion

- Briefly, timelines – I want you to think back about 5 years…
    - How has the way you consume/follow news changed
    - Probe technology, social media – how is this changing the way news is consumed, how is it changing assumptions about news
    - How do you feel about what you consume/follow digitally

- Now let's think about different ways of getting news…
    - Show platform on card – repeat for TV, print newspaper, news website, social media
    - How do you use [platform] for news
    - What are the strengths/advantages for you of this platform for news
    - What are the weaknesses/disadvantages for you of this platform for news
    - (e.g. immediacy of video, detail of print, tailoring and speed of social media, etc)
- How do these platforms compare
    - Explore how they are used in different ways – at different points of the day/routines, how they work together/complementary
    - Explore differences between traditional news media and digital/social media platforms
    - If you could have only one which would it be, why
    - Show each platform card in turn – give me one word to sum up this platform
- Explore platforms for different factors – display all platform cards on table – where would you go for/which is best for…, why
    - Breaking news
    - Accuracy of news story
    - Impartial/unbiased news
    - Depth of analysis
    - Trustworthy news

5. BRANDS (20 mins)
This section explores news in terms of brands… and any differences in how respondents feel about traditional news brands in the digital world vs news provided by platform brands and aggregators

- Mapping exercise – provide brand names on cards and ask the group to sort them into piles that go together – explore what each pile has in common and the differences between the piles
- Brands on cards: [use the top 8 per market – plus a few more, including social media and aggregator brands] – photograph mapping
    - ➢ *[UK: BBC News online, Sky News online, Guardian online, Mail online, Huffington Post, Buzzfeed, Telegraph online, Mirror online; others could be Sun, Times, Independent, Evening Standard]*
    - ➢ *[US: CNN online, New York Times online, Huffington Post, Buzzfeed, Yahoo news, Guardian online, Fox News online, BBC News online; others could be Washington Post, NPR online (national public radio), USA Today, ABC News, NBC News, Vice News, Vox News (both digital born)]*

- *[DE: Spiegel online, t-online, Bild.de, Tagesschau.de, Huffington Post, N24.de, Sueddeutsche.de, Heute.de, Stern.de, Zeit.de, Focus online, Welt.de, Buzzfeed.de, Vice News, Handellsblat online]*
- *[ES El País online, El Mundo online, ABC.es, HuffingtonPost.es, ElConfidencial.com, ElDiario.es, La Vanguardia online, ElEspañol.com, 20 Minutos online, elperiodico.com, publico.es, Marca online, Buzzfeed, LaSexta online, telecinco.es, cadenaser.com (the #1 radio), lainformation.com]*

- Tell me about the brands you've put together – what do they have in common, how do they differ from the others
    - Use prompt board and probe: breaking news, range of stories, accuracy/reliability, unbiased/impartial, clear/helps me understand issues, entertaining, good to share/talk about
    - Which do you feel are more trustworthy, feel more comfortable with, why
- Focus on a few brands – broadcaster, print heritage, digital born
    - *[UK: BBC News online, Mail online, Buzzfeed]*
    - *[US: New York Times online, Huffington Post and Buzzfeed]*
    - *[DE: Spiegel online, Bild online, Huffington Post]*
    - *[ES: El País online, ElConfidencial.com or El Español, Huffington Post]*
    - What are the brand's strengths, associations

6. EXPLORING TRUST (20 mins)

Use this section to explore and consolidate an appreciation of trust in broad terms before exploring trust in news. Explore both explicitly in the discussion and implicitly from the tone of the conversation

- What does trust mean, what characterises trust
    - What does trust mean when you think of your family, your friends, your neighbour – what is in common
    - What does trust mean when you think of your doctor, your bank
    - Can you trust a stranger, what would help you trust them, what makes something trustworthy
- What are the institutions you trust in this country, why
    - Show scatter-board (government, doctors, police, court of law, teachers, banks, the media)
    - Generally, what/who do you think is trusted in this country, what/who is not trusted, why
    - If media not trusted, why (probe quality, political influence, business influence), has it got worse/become less trustworthy

- Let's think about trust in news… Explore using a current news story as stimulus, supported with montage of reporting from difference sources [UK/DE/ES: refugee crisis / US: immigration] – allow a little discussion of the story before probing
    - How do you feel about this story, explore interest/relevance, what do you believe about it
- Examine the factors that contribute towards trust/mistrust – explore factors on prompt cards – and pursue discussion of the factors in terms of other examples if raised
    - The accuracy of the coverage
    - Impartiality/bias – perceptions of political interference, commercial interference
    - Interest/relevance

- From examining this specific news story, explore the drivers of trust…
- What makes you feel comfortable about the news you consume/follow, what makes it trustworthy
    - Probe: the type of story (serious, entertaining), the journalist, the brand, the format (text, images, video), the platform (on smart device, print or TV) – which gets credit
- What undermines trust, what are the reasons you don't trust news
    - Probe: perceptions of political interference, perceptions of commercial interference, discovering inaccuracies, bias/lack of impartiality, perception of stories being supressed

7. DISTRIBUTED ENVIRONMENTS (30 mins)

This section gets to the heart of the research, exploring perceptions of distributed environments, where news is collected together in a digital platform. How is this used in comparison with other platforms and how do people feel about these digital platforms? Do they trust them in the same way, and what contributes to the sense of trust/mistrust? What are the implications for traditional news brands, and for their role in society and trust in institutions?

- Let's focus on some of the newer, digital ways of getting news…
- How do you use these newer brands, why – complement vs substitute
    - What do you gain (e.g. convenience, variety/plurality, personalisation)
    - What might you lose (e.g. editorial selection, breadth)
    - Does this vary by type of news story
    - Does this vary by stage in development of a story
- Do you share news stories on social media, do you receive them – how does that impact how you feel about them
- What contributes to trust in these newer brands/sources compared with traditional news brands
    - Who/what gets the credit – the sender, the platform, the news brand, the journalist
    - Explore trust in brand vs specific journalist
- How do you feel about news brands in traditional formats vs in social media
    - How does it work for you in social media – complementary vs replacement
    - When using social/digital platforms for news do you prefer to consume the news in that platform or click away to the news website, why

- Show stimulus film/boards to showcase and explore examples of distributed news environments – moderator to explain film/boards and point out key aspects for discussion
    - First show and explore Facebook/Twitter (social media)
    - Then show Apple News/Flipboard/Nuzzel (aggregators)

- How do you feel about this as a way to get news – strengths, weaknesses
- Probe on headline, type of story, brand, sender
    - How do you chose what to read/watch
    - How important are each of these elements, why
- How do you feel about the range/selection you get
    - How is the selection made – awareness of algorithm

- What do you think is the role of the platform brand (e.g. Facebook, Twitter, Apple News, Flipboard)
- How does that compare with a traditional editor – advantages, disadvantages
- Probe awareness/concern about use of their data
- Probe awareness/concern about restricting exposure to different sources and viewpoints

8. FUTURE (10 mins)

In this section briefly explore perceptions of news in the future and explore some possible future consequences of the growth of distributed environments

- Timelines – I want you to look into the future, imagine what things will be like in 5 years' time…
    - How will the way you consume/follow news have changed, what do you imagine you'll do differently
    - Probe technology, social media, traditional news brands
- How should new players in the market inspire trust, what will they need to do

- Read out information about traditional news brands and digital/social brands – allow initial discussion then explore trust

Impact on traditional news brands of shift to digital and digital born brands

- If people increasingly rely on digital platforms for news, how will that effect trust in news
- Monetising – if more and more news is available free, how will traditional news brands continue as viable businesses (digital revenue is not making up for decline in revenue from print)
    - Would you pay for news, would you subscribe
    - How will aggregators (e.g. Google News, Apple News, Flipboard) get the news content if traditional news brands decline

Impact of shift to digital/distributed environments on trust in news, consequences for trust elsewhere

- If the news media is one of the ways in which politicians, institutions and people in power are held to account, what are the implications if news providers are impoverished
    - What impact might there be on trust in these institutions

9. CLOSING (5 mins)

Sum up and bring discussion to a close. Select one or two good respondents for follow-up short filmed interview. Provide form to sign and explain

- What are the main points we've learnt today, what should I take away from this discussion
- How does trust work for these newer ways of consuming news, how does that compare with transitional news brands
- Any other thoughts
- Disclose client: Reuters Institute for the Study of Journalism, University of Oxford – they publish an annual report on news
- Thank and close

FOLLOW-UP FILMED MINI-DEPTHS
Make sure the respondent includes the question points in their answer so that we can edit standalone clips – if necessary, ask him/her to answer again

- Describe your media use – tell me about how you follow news and which sources you use
- Describe three brands you use and the differences (e.g. Buzzfeed, HuffP, NYT or more serious ones)
- How do you decide what to trust online/ what not to trust
- Do you trust brands or journalist
- Do you see social media as a replacement for news brands or as complementary
- When you access news via social media/aggregator/search, how important is the brand
- Journalist or algorithm – how do you feel about having an editor making a selection vs an algorithm selecting, tell me about which you trust more

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Appendix D: Recruitment questionnaire

Sample summary:

Group	Nation	City	Age	DatE
1	UK	London	20-34	Tue 9th Feb
2	UK	London	35-54	Tue 9th Feb
3	USA	New York	20-34	Mon 15th Feb
4	USA	New York	35-54	Mon 15th Feb
5	DE	Hamburg	20-34	Mon 15th Feb
6	DE	Hamburg	35-54	Mon 15th Feb
7	ES	Madrid	20-34	Wed 17th Feb
8	ES	Madrid	35-54	Wed 17th Feb

- Recruiting 8 for 6 per group
- Even male/ gender split [Q14]
- Quotas on age within each group [Q15]
  - Younger (20-34): 4x 20-25, 4x 26-34
  - Older (35 -54): 4x 35-44, 4x 45-54
- High/ mid social grade (or income) – UK social grades BC1C2 and equivalents per market [Q17]
- ALL to have high and mid-level interest in news (aim for even split per group) [Q5]
- ALL to be following news at least several times a week [Q6]
- ALL to be using mobile device(s) to follow news content (i.e. smartphone, tablet, e-reader) [Q7]
- ALL to be users of digital news sources [Q8]
- Mix of news categories of interest (to include mix of hard and soft news topics) [Q9]
- All to be using at least one online news source of interest at Q10; aiming for mix of broadcaster, newspaper and digital-born brands
- US only: Q10A – aim for 2 or 3 per group using at least one of these brands online
- Aim for at least 3 per group using apps or news aggregators at Q11 [likely to be higher incidence among 'younger' group]
- Aim for at least 3 per group using social media for news (brands highlighted in bold) at Q12 [likely to be higher incidence among 'younger' group]
- Mix of political attitudes/ affiliation- aim for no more than 4 left wing (1-3), 4 right wing (6-8) and 4 centre(4)[Q13]
- Aim for reflective mix of working statuses [Q16]
- ALL must give consent to filming [Q18]

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Q1. First of all, do you or any of your family members or close friends work in any of the following occupations?

Journalism	1 CLOSE
Market Research	2 CLOSE
Media – TV, newspapers, radio, or online	3 CLOSE
Local, regional or national government	4 CLOSE
Political party/organisation	5 CLOSE
None of these	6

IF YES TO ANY OF CODES 1-5 CLOSE INTERVIEW

Q2. Have you ever taken part in a market research interview or group discussion, either online or in person?

Yes	1 ASK Q3
No	2 GO TO Q5

Q3. When did you last take part in a market research interview or group discussion, either online or in person?

In the last 6 months	1 ASK Q4
Longer ago than 6 months	2 GO TO Q5

Q4. What was the market research about?

IF SUBJECT SIMILAR TO THIS STUDY, CLOSE DEMOGRAPHICS

Q5. How interested, if at all, would you say you are in news?

Extremely interested	1	REFER TO QUOTAS
Very interested	2	
Somewhat interested	3	
Not very interested	4	CLOSE
Not at all interested	5	CLOSE
Don't know	6	CLOSE

ALL TO HAVE HIGH (Q/1, 2) TO MID-LEVEL (Q/3) INTEREST

CLOSE IF NOT VERY/ NO INTEREST IN NEWS

READ ALOUD:

We know from talking to other people that they get the news in different ways. Some people tell us that they watch TV or listen to the radio in the morning, while they're getting up or driving to work. Others read newspapers or look at news on their mobiles on their commute, or read it online throughout the day either on a PC or laptop or via a mobile phone app. Some people get news updates through social media such as Facebook and Twitter and many people watch news on TV in the evening or have the radio on in the background while they are doing other things.

When answering the following questions, please think about your whole day and all the times you might be in contact with news….

Q6. How often do you access news? By news we mean national, international, regional/ local news and other topical events accessed via any platform (radio, TV, newspaper or online).

Several times a day	1	
Once a day	2	
Several times a week	3	
Once a week	4	CLOSE
2-3 times a month	5	CLOSE
Once a month	6	CLOSE
Less often than once a month	7	CLOSE
Don't know	8	CLOSE
Never	9	CLOSE

Q7. Which, if any, of the following devices have you used to access news content in the last week? *Please select all that apply.*

Smartphone made by Apple (iPhone)	1	ENSURE A MIX OF DEVICES USED PER GROUP
Smartphone made by another manufacturer (e.g. Samsung, LG, HTC, Sony, Nokia Lumia)	2	
Other internet connected phone (e.g. older Blackberry, Nokia feature phone etc.)	3	
Laptop or desktop computer (at work or home)	4	
Tablet computer made by Apple (e.g. iPad)	5	
Other tablet computer (e.g. Samsung, Galaxy, Kindle Fire HD)	6	
E-book reader (e.g. other Kindle device, Kobo)	7	
Connected TV (a TV that connects to the internet via set top box, games console, other box such as Apple TV etc.)	8	
Smart TV (TV that connects to the internet directly without the need for any other box)	9	
Smart watch, wristband or smart glasses that connect to the internet	10	
Other mobile device that connects to the internet	11	
None of these	12	CLOSE
Don't know	13	CLOSE

ALL TO BE USING AT LEAST ONE MOBILE DEVICE TO FOLLOW NEWS CONTENT [CODES 1-3, 5-7]

Q8[UK]. Which if any of the following have you used in the last week as a source of news? *Please select all that apply.*

<table>
<tr><td>Television news bulletins or programmes such as News at Ten, C4 News, Good Morning Britain, Newsnight and Question Time</td><td>1</td><td rowspan="11">CLOSE IF HAVEN'T USED ANY DIGITAL NEWS SOURCES [CODES 6-10]</td></tr>
<tr><td>24 hour news television channels such as Sky News or BBC News Channel</td><td>2</td></tr>
<tr><td>Radio news bulletins or programmes such as Today, 5 Live Breakfast</td><td>3</td></tr>
<tr><td>Printed newspapers such as Guardian or Daily Mail</td><td>4</td></tr>
<tr><td>Printed magazines such as the Economist or The Week</td><td>5</td></tr>
<tr><td>Websites/ apps of newspapers such as theguardian.com or Mail Online</td><td>6</td></tr>
<tr><td>Websites/ apps of news magazines such as the Economist or The Week</td><td>7</td></tr>
<tr><td>Websites/ apps of TV and Radio companies such as BBC News Online or Sky News Online</td><td>8</td></tr>
<tr><td>Websites/ apps of other news outlets such as MSN, Yahoo, Huffington Post, Buzzfeed, Vice or Google News</td><td>9</td></tr>
<tr><td>Social media such as Facebook or Twitter</td><td>10</td></tr>
<tr><td>Blogs</td><td>11</td></tr>
<tr><td>None of these</td><td>12</td><td>CLOSE</td></tr>
</table>

ALL TO BE USING AT LEAST ONE DIGITAL NEWS SOURCE [CODES 6-10]

Q8[DE]. Which if any of the following have you used in the last week as a source of news? *Please select all that apply.*

<table>
<tr><td>Television news programmes or bulletins such as Tagesschau, heute oder RTL aktuell</td><td>1</td><td rowspan="11">CLOSE IF HAVEN'T USED ANY DIGITAL NEWS SOURCES [CODES 6-10]</td></tr>
<tr><td>24 hour news television channels such as N24, n-tv oder ZDF Infokanal</td><td>2</td></tr>
<tr><td>Radio news bulletins or programmes such as Deutschlandfunk oder NDR info</td><td>3</td></tr>
<tr><td>Printed Newspapers such as Die Welt oder die Bild-Zeitung</td><td>4</td></tr>
<tr><td>Printed Magazines such as Der Spiegel, Stern oder Focus</td><td>5</td></tr>
<tr><td>Websites/apps of Newspapers such as welt.de oder Bild.de</td><td>6</td></tr>
<tr><td>Websites/apps of news magazines such as Spiegel Online, stern.de, FOCUS Online</td><td>7</td></tr>
<tr><td>Websites/apps of TV and Radio companies such as ARD.de, ZDF.de, rtl.de oder n24.de</td><td>8</td></tr>
<tr><td>Websites/apps of other news outlets such as gmx.de, t-online.de, web.de oder Google News</td><td>9</td></tr>
<tr><td>Social media such as Facebook or Twitter</td><td>10</td></tr>
<tr><td>Blogs</td><td>11</td></tr>
<tr><td>None of these</td><td>12</td><td>CLOSE</td></tr>
</table>

ALL TO BE USING AT LEAST ONE DIGITAL NEWS SOURCE [CODES 6-10]

Q8[ES]. Which if any of the following have you used in the last week as a source of news? *Please select all that apply.*

Television news programmes or bulletins such as Telediario, Antena 3 Noticias, Informativos Telecinco or the regional one (= “o el autonómico o local”, in Spanish), and/or programmes such as Los desayunos, Las mañanas de Cuatro, La Sexta noche or Salvados	1	CLOSE IF HAVEN’T USED ANY DIGITAL NEWS SOURCES [CODES 6-10]
24 hour news television channels such as Canal 24 Horas, Euronews, 3/24, BBC World, CNN o Al Jazeera	2	
Radio news bulletins or programmes such as Hoy por hoy, Herrera en la Onda, La mañana, Hora 25 o los de radios autonómicas o locales	3	
Printed Newspapers such as El País, El Mundo, Marca, 20minutos o un diario de mi Comunidad o ciudad	4	
Printed Magazines such as XLSemanal, El País Semanal, Actualidad Económica, Tiempo, Interviú o Cambio16	5	
Websites/apps of Newspapers such as El País, El Mundo, Marca, 20minutos o un diario de mi Comunidad o ciudad	6	
Websites/apps of news magazines such as XLSemanal, El País Semanal, Actualidad Económica, Tiempo, Interviú o Cambio16	7	
Websites/apps of TV and Radio companies such as Noticias RTVE, Antena 3, Telecinco, LaSexta, Cadena SER o autonómicas	8	
Websites/apps of other news outlets such as El Confidencial, Eldiario.es, Público.es, Huffington Post o Google News	9	
Social media such as Facebook, Twitter or WhatsApp	10	
Blogs	11	
None of these	12	CLOSE

ALL TO BE USING AT LEAST ONE DIGITAL NEWS SOURCE [CODES 6-10]

Q8[US]. Which if any of the following have you used in the last week as a source of news? *Please select all that apply.*

Television news programmes or bulletins such as Evening News, Nightly News, Today, 60 Minutes	1	CLOSE IF HAVEN’T USED ANY DIGITAL NEWS SOURCES [CODES 6-10]
24 hour news television channels such as CNN or Fox News	2	
Radio news bulletins or programmes such as The Rush Limbaugh Show, Morning Edition, The Sean Hannity Show, All Things Considered	3	
Printed Newspapers such as USA Today, The New York Times, Daily News	4	
Printed Magazines such as the Economist, or Time	5	
Websites/apps of Newspapers such as NYTimes.com, NYDailyNews.com, MailOnline.com	6	
Websites/apps of news magazines such as The Economist or Atlantic	7	
Websites/apps of TV and Radio companies such as CBS, NBC, NPR	8	
Websites/apps of other news outlets such as MSN, Yahoo, Huffington Post, Buzzfeed, Vox	9	
Social media such as Facebook or Twitter	10	
Blogs	11	
None of these	12	CLOSE

ALL TO BE USING AT LEAST ONE DIGITAL NEWS SOURCE [CODES 6-10]

Q9. Which of the following types of news are you interested in? *Please select all that apply.*

National news	1	ENSURE A MIX OF CATEGORIES/ NEWS INTERESTS
International news	2	
Local news about my town or city	3	
News about my region	4	
Business and financial news	5	
News about the economy	6	
Entertainment and celebrity news	7	
Fun/ weird news	8	
Health news	9	
Education news	10	
Arts and culture news	11	
Sports news	12	
News about national politics	13	
Science and technology news	14	
Other	15	
None of these	16	
Don't know	17	

MONITOR MIX OF 'HARD' (CODES 1 // 6, 13) AND 'SOFT' (CODES 7// 12, 14, 15) CATEGORIES

Q10[UK]. Which, if any, of the following have you used to access news in the last week? Via online (web, mobile, tablet, e-reader). *Please select all that apply.*

BBC News online	1	ENSURE THAT ALL USE AT LEAST 1 SERVICE; AND AIM FOR A MIX OF BROADCASTERS (CODES 1,2), NEWSPAPERS (3,4,7,8) AND DIGITAL-BORN (5,6)
Sky News online	2	
Guardian online	3	
Mail online	4	
Huffington Post	5	
Buzzfeed	6	
Telegraph online	7	
Mirror online	8	
None of these	9	CLOSE

Q10[DE]. Which, if any, of the following have you used to access news in the last week? Via online (web, mobile, tablet, e-reader). *Please select all that apply.*

Spiegel Online	1	ENSURE THAT ALL USE AT LEAST 1 SERVICE; AND AIM FOR A MIX OF BROADCASTERS (CODES 4,6,8), NEWSPAPERS (1,3,7) AND DIGITAL-BORN (2,5)
t-online	2	
Bild.de	3	
Ard.de (bzw. Daserste.de, tagesschau.de)	4	
Huffington Post	5	
N24.de	6	
Sueddeutsche.de	7	
Zdf.de (bzw. heute.de)	8	
None of these	9	CLOSE

Q10[ES]. Which, if any, of the following have you used to access news in the last week? Via online (web, mobile, tablet, e-reader). *Please select all that apply.*

RTVE online	1	ENSURE THAT ALL USE AT LEAST 1 SERVICE; AND AIM FOR A MIX OF BROADCASTERS (CODES 1,2), NEWSPAPERS (3,4,8) AND DIGITAL-BORN (5,6,7)
Antena 3 online	2	
El País online	3	
El Mundo online	4	
ElConfidencial.com	5	
ElDiario.es	6	
ElEspañol.com	7	
20 Minutos online	8	
None of these	9	CLOSE

Q10[US]. Which, if any, of the following have you used to access news in the last week? Via online (web, mobile, tablet, e-reader). *Please select all that apply.*

CNN online	1	ENSURE THAT ALL USE AT LEAST 1 SERVICE; AND AIM FOR A MIX OF BROADCASTERS (CODES 1,7,8), NEWSPAPERS (2,6) AND DIGITAL-BORN (3,4,5)
New York Times online	2	
Huffington Post	3	
Buzzfeed	4	
Yahoo news	5	
Guardian online	6	
Fox News online	7	
BBC News Online	8	
None of these	9	CLOSE

Q10A[US]. Which, if any, of the following have you used to access news in the last week? Via online (web, mobile, tablet, e-reader). *Please select all that apply.*

New York Post online	1	AIM FOR 2-3 PER GROUP USING AT LEAST 1 OF THESE LOCAL-/ CITY-FOCUSED BRANDS
Daily News online	2	
am New York online	3	
Metro New York online	4	
NY1 online	5	
News 12 online	6	
None of these	7	CLOSE

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Q11. Which, if any, of the following **apps or news aggregation services** have you used to access news in the last week? Via online (web, mobile, tablet, e-reader). *Please select all that apply.*

Google News (not Google search)	1	AIM FOR AT LEAST 3 PARTICIPANTS PER GROUP USING AT LEAST 1 APP OR AGGREGATOR SERVICE
iOS news (list of news links that appear under the search box on an iPhone and iPad)	2	
Apple News (the app called News which appears by default on iPhones and iPads)	3	
Google Play Newsstand	4	
Nuzzel	5	
Yahoo News Digest	6	
Flipboard	7	
Smartnews	8	
Feedly	9	
Reddit news (e.g. /r/news, /r/inthenews, or /r/worldnews)	10	
Snapchat Discover	11	
Twitter Moments	12	
LinkedIn Pulse	13	
Blendle	14	
Facebook Notify	15	
Facebook Paper [US ONLY]	16	
None of these	17	

Q12[UK]. Which, if any, of the following **social media services** have you used for finding, reading, watching, sharing or discussing news in the last week? *Please select all that apply.*

Facebook	1	AIM FOR AT LEAST 3 PARTICIPANTS PER GROUP USING AT LEAST 1 OF THE SOCIAL MEDIA IN BOLD TEXT [CODES 1,4,5,9,15,18]
LinkedIn	2	
MySpace	3	
Twitter	4	
YouTube	5	
Google Plus (not Google search)	6	
Instagram	7	
Tumblr	8	
Reddit	9	
Vine	10	
Digg	11	
Stumbleupon	12	
Pinterest	13	
Flickr	14	
WhatsApp	15	
Line	16	
Viber	17	
Snapchat	18	
Kakao Talk	19	
Telegram	20	

Periscope	21	
WeChat	22	
None of these	23	

Q12[DE]. Which, if any, of the following **social media services** have you used for finding, reading, watching, sharing or discussing news in the last week? *Please select all that apply.*

Facebook	1	
LinkedIn	2	
MySpace	3	
Twitter	4	
YouTube	5	
Google Plus (not Google search)	6	
Instagram	7	
Tumblr	8	
Reddit	9	
Vine	10	
Digg	11	
Stumbleupon	12	AIM FOR AT LEAST 3 PARTICIPANTS PER GROUP USING AT LEAST 1 OF THE SOCIAL MEDIA IN BOLD TEXT [CODES 1,4,5,9,15,18]
Pinterest	13	
Flickr	14	
WhatsApp	15	
Line	16	
Viber	17	
Snapchat	18	
Kakao Talk	19	
Telegram	20	
Periscope	21	
WeChat	22	
Stayfriends	23	
Wer kennt wen	24	
XING	25	
None of these	26	

Q12[ES]. Which, if any, of the following **social media services** have you used for finding, reading, watching, sharing or discussing news in the last week? *Please select all that apply.*

Facebook	1	
LinkedIn	2	
MySpace	3	
Twitter	4	
YouTube	5	
Google Plus (not Google search)	6	
Instagram	7	
Tumblr	8	
Reddit	9	
Vine	10	
Digg	11	AIM FOR AT LEAST 3 PARTICIPANTS PER GROUP USING AT LEAST 1 OF THE SOCIAL MEDIA IN BOLD TEXT [CODES 1,4,5,9,15,18]
Stumbleupon	12	
Pinterest	13	
Flickr	14	
WhatsApp	15	
Line	16	
Viber	17	
Snapchat	18	
Kakao Talk	19	
Telegram	20	
Periscope	21	
WeChat	22	
Tuenti	23	
None of these	24	

Q12[US]. Which, if any, of the following **social media services** have you used for finding, reading, watching, sharing or discussing news in the last week? *Please select all that apply.*

Facebook	1	AIM FOR AT LEAST 3 PARTICIPANTS PER GROUP USING AT LEAST 1 OF THE SOCIAL MEDIA IN BOLD TEXT [CODES 1,4,5,9,15,18]
LinkedIn	2	
MySpace	3	
Twitter	4	
YouTube	5	
Google Plus (not Google search)	6	
Instagram	7	
Tumblr	8	
Reddit	9	
Vine	10	
Digg	11	
Stumbleupon	12	
Pinterest	13	
Flickr	14	
WhatsApp	15	
Line	16	
Viber	17	
Snapchat	18	
4Chan	19	
YikYak	20	
Kakao Talk	21	
Telegram	22	
Periscope	23	
WeChat	24	
None of these	25	

Q13. Some people talk about 'left', 'right' and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale?

Very left-wing	1	REFER TO QUOTAS
Fairly left-wing	2	
Slightly left-of-centre	3	
Centre	4	
Slightly right-of-centre	5	
Fairly right-wing	6	
Very right-wing	7	
Don't know	8	

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DEMOGRAPHICS

Q14. GENDER

Male	1	REFER TO QUOTAS
Female	2	

Q15. AGE
Write exact age and code below to ensure quotas met.

16 - 19	1	CLOSE
20 - 25	2	REFER TO QUOTAS
26 - 34	3	
35 - 44	4	
45 - 54	5	
55+	6	CLOSE

Q16. Working status?

Full-time paid work (30+ hours per work)	1	REFER TO QUOTAS
Part-time paid work (8-29 hours per week)	2	
Part time paid work (under 8 hours per week)	3	
Retired	4	
Still at school	5	
In full-time higher education	6	
Unemployed (seeking work)	7	
Not in paid employment (not seeking work)	8	

Q17. What is the occupation of the main income earner in your household? That is, the person with the largest income, whether from employment, benefits, investments or any other source.

RECORD VERBATIM RESPONSE(S)
If required PROBE for: Position/rank/grade; industry/type of company; qualifications/degree/apprenticeship; number of staff responsible for, etc.

A	1	REFER TO QUOTAS
B	2	
C1	3	
C2	4	
D	5	CLOSE
E	6	CLOSE

<SEG equivalent for US, Germany and Spain>

Q18. Part of the research may involve you answering a few short questions on camera at the end of the discussion group. Kantar Media and/or our client may use film clips of you in the following ways:

- For internal use by our client, such as in edited films that can be shared internally and/or used in presentations
- Possible inclusion in industry conference presentations
- Possible inclusion on client website

The filming should take around 10 - 15 minutes to complete. With this in mind, are you willing to participate in the discussion group?

YES	1	
NO	2	THANK & CLOSE