UNIVERSITY OF OXFORD

Reuters Institute for the Study of Journalism

REUTERS INSTITUTE DIGITAL NEWS REPORT 2014

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TRACKING THE FUTURE OF NEWS

EDITED BY

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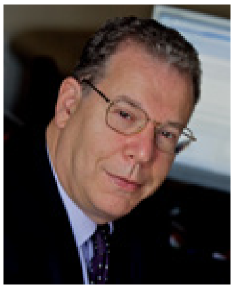


FOREWORD

Dr David A. L. Levy
Director, Reuters Institute

This is our third annual report that looks to track and compare changes in online news consumption across countries. This year we find more compelling evidence about the pace of the multi-platform revolution and the increasing use of smartphones and tablets for news. The report also explores different ways in which people are paying for news, the growing importance of video content, and brings unique data about the role played by different social networks for news in our participating countries.

But there are many other fascinating insights that have emerged from this year's survey of almost 19,000 people in ten countries. We have included Finland this year – in addition to the US, UK, France, Germany, Denmark, Italy, Spain, Brazil,[1] and Japan that provided the basis for last year's survey. We've asked more questions and have increased sample sizes in most countries.

Once again we combined these data with a series of essays, which add depth and context to the findings, and these have been strengthened by continuing academic partnerships with the Hans Bredow Institute in Hamburg, the School of Journalism at the Institute of Political Science in Paris, and Roskilde University in Denmark – and new for 2014 with the School of Communication at the University of Navarra in Spain.

Many of our academic partners are also organising events or country reports looking in more detail at national themes – and adding wider value to this international project.

We continue to make efforts to open up as much of the data as possible via our website at (www.digitalnewsreport.org). This contains slidepacks, charts, and raw data tables, along with a licence that encourages reuse. Also this year, we have developed a number of interactive features including a country-comparison application. We hope that this will continue to build into an invaluable resource for academics, journalists and those developing media policy to explain the past as well as the future. A description of the methodology is available on the website along with the complete questionnaire.

Making all this possible, we are hugely grateful to our sponsors this year, who include Google, BBC, Ofcom, France Télévisions, the Media Industry Research Foundation of Finland, Newsworks, Edelman UK, as well as our academic sponsors and partners at Roskilde University, the Hans Bredow Institute, and the University of Navarra. However sole responsibility for the analysis, interpretation, and conclusions drawn lies with the authors and editors of the Report.

I am also grateful to YouGov, our polling company, who did everything possible to accommodate our complex requirements and helped our research team analyse and contextualise the data and to Christian Arvidsson of Edelman for design and layout of this year's report.

[1] The survey only covered urban Brazil. See the following section on methodology.

METHODOLOGY

This study has been commissioned by the Reuters Institute for the Study of Journalism to understand how news is being consumed in a range of countries. Research was conducted by YouGov using an online questionnaire at the end of January/beginning of February 2014.

- The data were weighted to targets based on census/industry accepted data, such as age, gender, region, newspaper readership, and social grade, to reflect the total population of each country. The sample is reflective of the population that has access to the internet.
- As this survey deals with news consumption, we filtered out anyone who said that they had not consumed any news in the past month, in order to ensure that irrelevant responses didn't adversely affect data quality. This category was between 1% and 3% in most countries but as high as 8% in the UK.
- A comprehensive online questionnaire was designed to capture all aspects of news consumption.
- Core questions were asked in France, Germany, Denmark, Finland, Spain, Italy, Japan, Brazil, and the US, as well as the UK, where there was a slightly longer questionnaire.

This is an online survey – and as such the results will under-represent the consumption habits of people who are not online (typically older, less affluent, and with limited formal education). Where relevant, we have tried to make this clear within the text. Going forward, these issues will become less of a factor as online penetration grows. The core purpose of this survey is not to deliver absolute numbers, but rather to track the activities and changes over time within the digital space – as well as gaining understanding about how offline media and online media are used together. A fuller description of the methodology and a discussion of non-probability sampling techniques can be found on our website.

Along with country based figures, throughout the report we also use aggregate figures based on responses from all respondents across all the countries covered. These figures are meant only to indicate overall tendencies and should be treated with caution.

COUNTRY	STARTING SAMPLE	NON NEWS USERS	FINAL SAMPLE	TOTAL POPULATION	INTERNET PENETRATION
USA	2384	8%	2197	313,847,465	78%
UK	2271	8%	2082	63,047,162	84%
GERMANY	2116	3%	2063	81,305,856	83%
FRANCE	2039	5%	1946	65,630,692	80%
DENMARK	2075	2%	2036	5,543,453	90%
FINLAND	1532	1%	1520	5,262,930	89%
SPAIN	2082	3%	2017	47,042,984	67%
ITALY	2041	2%	2010	61,261,254	58%
URBAN BRAZIL	1037	2%	1015	193,946,886	46%
JAPAN	2015	2%	1973	127,368,088	80%

* Please note that Brazil is representative of an urban population rather than a national population, which must be taken into consideration when interpreting results. Source: http://www.internetworldstats.com – population estimate 2012

AUTHORSHIP AND RESEARCH ACKNOWLEDGEMENTS

Dr David A. L. Levy is Director of the Reuters Institute for the Study of Journalism and an expert in media policy and regulation. He previously worked at the BBC both as a news and current affairs producer, reporter, and editor, and later as Controller Public Policy. He is the author of E*urope's Digital Revolution: Broadcasting Regulation, the EU and the Nation State* (Routledge 1999/2001), and joint editor with Tim Gardam of *The Price of Plurality* (RISJ/Ofcom 2008), with Rasmus Kleis Nielsen of *The Changing Business of Journalism and its Implications for Democracy* (RISJ, 2010) and with Robert G. Picard of *Is there a Better Structure for News Providers? The Potential in Charitable and Trust Ownership* (RISJ, 2011). He recently co-authored *The Public Appetite for Foreign News on TV and Online* (RISJ, 2013) and jointly edited, with Nigel Bowles and James T. Hamilton, *Transparency in Politics and the Media: Accountability and Open Government* (RISJ/IB Tauris, 2013).

Nic Newman is a journalist and digital strategist who played a key role in shaping the BBC's internet services over more than a decade. He was a founding member of the BBC News Website, leading international coverage as World Editor (1997–2001). As Head of Product Development he led digital teams, developing websites, mobile, and interactive TV applications for all BBC Journalism sites. Nic is currently a Research Associate at the Reuters Institute for the Study of Journalism and a senior Research Fellow at City University London. He is also a consultant on digital media, working actively with news companies on product, audience, and business strategies for digital transition.

Commentary and additional insight has been provided by academic partners and by our network of Reuters Journalist Fellows around the world,[2] particularly in providing national context on our country pages, where authorship is indicated by initials. We are particularly grateful to:

- **Alice Antheaume** (AA), School of Journalism at the Institute of Political Science, Paris
- **Esa Reunanen** (ER), University of Tampere, Finland
- **Kim Christian Schrøder** (KCS), Professor, Department of Communication at Roskilde University (RUC) in Denmark
- **Rasmus Kleis Nielsen** (RKN), Reuters Institute and Assistant Professor of Communications at Roskilde University (RUC) in Denmark
- **Ramón Salaverría** (RS), **Ana Azurmendi** (AAz), and **Samuel Negredo** (SN), Center for Internet Studies and Digital Life at the University of Navarra
- **Uwe Hasebrink** (UH) and **Sascha Hölig** (SH), Professor and Senior Researcher at the Hans Bredow Institute for Media Research, Hamburg
- **Flávia Marreiro** (FM), Reuters journalist fellow and Foreign Affairs reporter for *Folha de S. Paulo in Brazil*
- **Nicola Bruno** (NB), former Reuters journalist fellow, co-founder and journalist at the news agency Effecinque.org in Italy
- **Ichiro Motozawa** (IM), former Reuters journalist fellow and broadcast journalist who has been working with NHK, Japan

Additional expert analysis and interpretation of the survey data were provided by the team at YouGov, in particular, Shaun Austin, Charlotte Clifford, and Bernadeta Wilk.

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

EXECUTIVE SUMMARY AND KEY FINDINGS

Nic Newman

This year's data provide further evidence of a new wave of disruption and change in digital news. In particular, we see mobile and social consumption reaching a new level of intensity, we see the different behaviours of young and old becoming more pronounced, and new kinds of journalistic organisation emerging.

- The use of smartphones and tablets has jumped significantly in the past year, with fewer people using their computers for news. More than a third of online news users across all countries (39%) use two or more digital devices each week for news and a fifth (20%) now say their mobile phone is their primary access point.
- The number of people paying for digital news has remained stable over the past 12 months, although we have seen a significant switch to more valuable ongoing digital subscription in most countries.
- Our new (and unique) social media index for news shows Facebook is by far the most important network for news everywhere. Although Twitter is widely used in the US, Spain, and the UK, it is far less influential in many other European countries. Google+ is emerging as increasingly important for news, along with messaging application WhatsApp.
- European respondents remain strongly committed to news that tries to be neutral (or impartial) but Americans are more interested in hearing from brands and reporters that are open about their own views and biases.
- Traditional brands remain strong in most markets, with cross-platform newspaper reach averaging 75% in most countries, but pure players and aggregators are now more or as popular in the US, Japan, and Brazil.
- US social sharing news sites like Huffington Post, Buzzfeed, and Upworthy are beginning to make inroads around the world, with new formats and a fresh tone of voice aimed at younger people. Our survey shows a new category of weird news proving more/as popular than entertainment news.

/// RAPID GROWTH IN BOTH MOBILE AND TABLET USE FOR NEWS

37%
access news from smartphone each week

Over the past year we have seen another significant jump in the adoption of both smartphones and tablets for news – as consumers embrace the benefits of smaller, personal, always-on devices. Germany and France have had a catch-up year, while others like Denmark have surged further ahead with 52% of the sample using a smartphone for news and 34% using a tablet on a weekly basis.

On average over a third of our global sample (37%) is accessing news from a smartphone each week and one in five (20%) from a tablet. In turn, this is driving more frequent access to news and from more locations.

As more people come on board, the profile of multi-platform users is getting more mainstream. Smartphone news users are getting older – we have seen a significant jump in usage by the 25–44 group – while falling prices have enabled tablet use to spread to less affluent groups and to the young.

SMARTPHONE USE FOR NEWS – ALL COUNTRIES

	US	UK	GER	FR	DEN	FIN	SP	IT	BRA	JPN
2014	31%	33%	32%	35%	52%	41%	44%	36%	35%	26%
2013	28%	29%	22%	24%	43%	–	35%	25%	23 %	19%
CHANGE	+3%	+4%	**+10%**	**+9%**	**+9%**	N/A	**+9%**	**+11%**	**+12%**	+7%

Q8b. Which, if any, of the following devices have you used to access news in the last week?

Base: Total country samples 2014 (18859) and 2013 (11004)

TABLET USE FOR NEWS – ALL COUNTRIES

	US	UK	GER	FR	DEN	FIN	SP	IT	BRA	JPN
2014	19%	23%	15%	18%	34%	23%	21%	18%	20%	10%
2013	16%	16%	10%	11%	25%	–	13%	14%	14%	6%
CHANGE	+3%	**+7%**	+5%	**+7%**	**+9%**	N/A	**+8%**	+2%	+6%	+4%

USE OF ONE DEVICE FOR NEWS WEEKLY – ALL COUNTRIES

	US	UK	GER	FR	DEN	FIN	SP	IT	BRA	JPN
2014	55%	49%	62%	63%	42%	–	56%	64%	61%	69%
2013	54%	44%	50%	54%	35%	44%	48%	61%	52%	62%
CHANGE	-1%	-5%	**-12%**	**-9%**	-7%	N/A	-8%	-3%	**-9%**	-7%

Q8b. Which, if any, of the following devices have you used to access news in the last week?

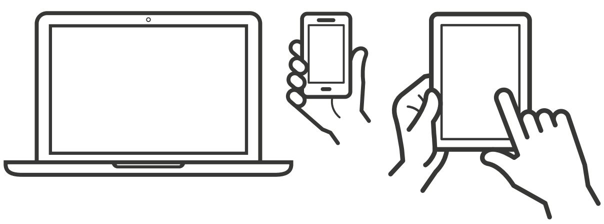
Base: Those who use devices UK= 2019, France=1815, Germany=1853, Denmark=1914, Italy= 1958, Spain=1988, Japan=1836, Brazil=955, US=2070, Finland=1470

Overall, we are moving away from use of a single device for news (traditionally the fixed computer or laptop) with particularly large drops in France and Germany.

Across our sample almost four in ten (39%) of those who use digital devices for news now use more than two to access the news, up from 33% in 2013. The number using more than three devices has grown from 9% to 12%.

On average a fifth (20%) of all users of digital devices say that the smartphone is now their MAIN way of accessing online news, with 10% using the tablet as their primary access point.

39% GET NEWS ON AT LEAST TWO DIGITAL DEVICES



12% USE THREE OR MORE DIGITAL DEVICES

MAIN SOURCE OF DIGITAL NEWS (2013 FIGURES IN BRACKETS FOR UK ONLY)

	UK	US	GER	FR	DEN	FIN	IT	BRA	SP	JPN
COMPUTER	57% (-23%)	69%	60%	61%	54%	74%	69%	62%	63%	79%
MOBILE	24% (+11%)	17%	24%	22%	24%	15%	19%	18%	22%	15%
TABLET	16% (+11%)	10%	9%	8%	18%	9%	8%	8%	9%	3%

Q8b.5. You've said you use the following devices to access news in the last week, which is your MAIN way of accessing online news?

Base: Those who use devices to access news UK=1591, France=1630, Germany=1506, Denmark=1746, Italy=1876, Spain=1806, Japan=1708, Brazil=893, US=1800, Finland=1361

/// INDUSTRY IMPACT AND THE ROLE OF APPS

These changes matter because new devices are not just increasing the frequency of news but also the way it is packaged, distributed, and discovered.

On smartphones, we find that news apps – rather than mobile websites – are often the main way of accessing news. In the UK, almost 50% of smartphone users say they mainly use apps. This figure has risen considerably over the past year (+6%) – as has the split between news apps and mobile browsing on tablets (+9%).

This is surprising given that most news organisations have introduced responsive websites that are better optimised for mobile. To some extent these data may reflect the strong penetration in the UK of Apple smartphones, which have tended to favour the use of apps. By contrast, in Finland where many people use Nokia phones, the use of apps on smartphones is far lower (around 30%), with most users preferring their web browser for news.

The use of apps varies considerably between countries and is mainly – but not entirely – dependent on the number of people using smartphones and tablets. News apps are proportionately used more on smartphones than tablets and the age profile is very different. In the UK, most (67%) of those using news apps on a tablet are over 45, whereas on the smartphone the majority of app usage is by the under 45s.

See section 4.1, The Growth of Multi-Platform News, p. 59.

% OF THOSE USING NEWS APPS ON SMARTPHONE OR TABLET – SELECTED COUNTRIES

COUNTRY	NEWS APPS
DENMARK	19%
UK	16%
US	15%
SPAIN	13%
GERMANY	12%

Q11. Thinking of the way you looked at news online in the last week which of the following ways of consuming news did you use?

Base: All

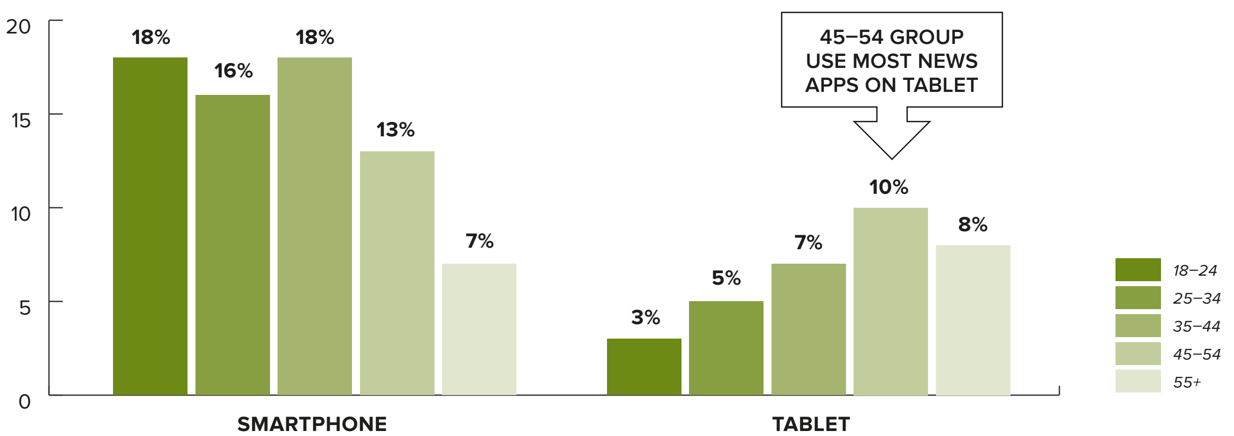
APP OR MOBILE WEBSITE TO ACCESS NEWS – UK

	SMARTPHONE	TABLET
MAINLY USE APPS	47% (+6)	37% (+9)
MAINLY BROWSER	38% (-4)	48% (-5)
ABOUT SAME	10% (-1)	10% (-4)

Q9a. Thinking specifically about when you look for news on a MOBILE, which of the following statements most applies to you?

Base: Mobile users=709, tablet users=486

% USING NEWS APPS BY AGE GROUP – UK



Q11. Thinking of the way you looked at news online in the last week which of the following ways of consuming news did you use?

Base: Smartphone app users=267, tablet app users=152

The proportion of Apple iOS to other operating systems such as Android varies. Apple continues to be the biggest player in the US, UK, and Denmark but elsewhere other devices are far more important.

This is important because our data show that Apple users are much more likely to access news on their smartphones and tablets and are more likely to pay for digital news. Even after adjusting for other variables such as income, education, and interest in news, we find that Apple tablet users in the United States were more than one and half times as likely to pay for digital news – and in the UK twice as likely. Also in the UK, tablets from other manufacturers are also significantly increasing payment for news but at a lower level.

PROPORTION OF APPLE SMARTPHONES + TABLETS PER COUNTRY

MOST	% APPLE	LEAST	% APPLE
DENMARK	58%	GERMANY	28%
US	46%	FINLAND	24%
UK	45%	SPAIN	23%

Q8b. Which, if any, of the following devices have you used to access news in the last week?

Base: Total country samples

/// SMARTPHONE ENCOURAGES FEWER NEWS SOURCES

Another important finding from our research is that users tend to use a narrower range of news sources on a smartphone than they do on a desktop or tablet. Across all of our countries, over one-third (37%) use just a single source each week on a smartphone – compared with 30% on a desktop or laptop. In some countries the difference is even starker, with 55% of UK smartphone users saying they use one news source each week compared with 45% of computer users.

55% access one news source weekly on a smartphone

This suggests a growing dependence on a small number of news apps, perhaps related to limited screen real estate available on a smartphone. In the UK the top trusted breaking news sources like the BBC and Sky – both of which have strong app propositions – seem to be benefiting from this 'smartphone effect', while aggregator brands like Yahoo and MSN are losing out.

SELECTED UK BRANDS – SMARTPHONE VS. COMPUTER

	MOBILE	COMPUTER	DIFFERENCE
BBC	67%	65%	+2
SKY	25%	15%	+10
MSN	2%	7%	-5%
YAHOO	3%	11%	-8%

Q19a. You say you access news via a smartphone/computer. When using that device what news sources have you accessed in the last week?

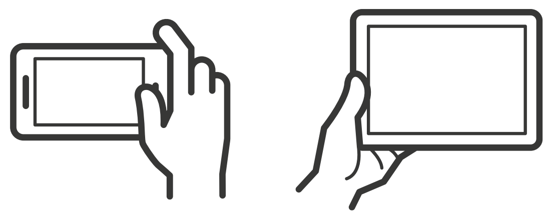
Base: Smartphone users=635, computer=1236

But multi-platform is not just about digital news. Across all of our countries, an average of 50% of those who access news on a tablet say they also read a printed newspaper at least once each week; 86% also watch TV news and we see similar patterns with smartphone users.

Heavy smartphone users are more likely to keep up to date with news throughout the day compared with an average news user (74% vs 66%). In Denmark and the UK, smartphones have overtaken print as the main way of accessing news on public transport such as trains and buses (69% vs 21% and 53% vs 40% respectively). New digital devices are changing consumption patterns particularly amongst the young but they are a long way from replacing traditional platforms, which remain important for all.

See section 2.3, Where and When do we Access the News?, p. 46.

% OF TABLET AND SMARTPHONE USERS USING OTHER MEDIA SOURCES WEEKLY (ALL COUNTRIES)



SMARTPHONE		TABLET	
TV NEWS	84%	TV NEWS	84%
NEWSPAPERS	40%	NEWSPAPERS	45%
RADIO NEWS	35%	RADIO NEWS	40%

/// PAYING FOR ONLINE NEWS

The growth in digital payment we saw between 2012 and 2013 seems to have stabilised in most markets – although some individual publishers are bucking the trend. Across our sample, just over one in ten (11%) say they have paid for digital news in the last year – either via a one-off purchase or ongoing subscription.

11% paid for online news in the last year

This is in line with publisher experience where new paywalls and paid apps often find easy growth for a while and then stall – after the supply of loyal users runs out.

In the absence of significant growth in the overall numbers, news organisations are focusing on maximizing revenue from those who are prepared to pay. Among this group we find that the majority (59%) are now making ongoing payments in the form of digital subscriptions – normally on a monthly, quarterly, or annual basis. There are two exceptions to this: Spain where more people are making one-off payments and Finland where there are more people paying for print and digital bundles.

See section 3.2 for detailed statistics on Paying for Digital News, p. 52.

59% payment by subscription – all countries (43% 2013)

In the UK, just over one-third of all digital subscribers have signed up with *The Times*, followed by the *Telegraph* and the *Sun* which both introduced paywalls in 2013. In the US, large numbers of digital subscribers have signed up for either the *New York Times* or the *Wall Street Journal*. In France, it is *Le Monde* and *Mediapart* leading the way and in Germany, the recently launched *Bild+* from Axel Springer is having an impact especially on mobile and tablet platforms.

The low figures for the likelihood to pay in the future (for those not already paying) make particularly worrying reading in the UK and may be explained by the abundant supply of quality free news from the BBC, Sky, Mail Online, and the Guardian. But in other markets such as (urban) Brazil, Spain, and Italy there is more potential for growth.

See section 1.11, Comparative Brand Data Analysis, p. 40.

MOVE TO SUBSCRIPTION (% OF PAYING DIGITAL SUBSCRIBERS WITH ONGOING SUBSCRIPTION)* – SELECTED COUNTRIES

	US	UK	GER	FRA	DEN	BRA
2013	60%	42%	37%	28%	63%	40%
2014	68%	63%	54%	47%	75%	65%
CHANGE	+8	**+21**	+17	**+19**	+12%	**+25**

Q7ai. Which of the following types of payment have you used to pay for ONLINE news?

Base: US=238, UK=139, Germany=173, France=216, Denmark=206, Brazil=233
* net subscribers include those with direct digital sub, combined print or with ISP or cable operator

% NON-PAYERS PREPARED TO PAY FOR ONLINE NEWS IN THE FUTURE

	US	UK	GER	FR	DEN	FIN	SPA	ITA	BRA	JAP
LIKELY*	11%	7%	15%	10%	11%	11%	21%	23%	61%	8%

Q7aii. You said you have not paid for online digital content in the last year. How likely or unlikely would you be to pay IN THE FUTURE for online news from particular sources that you like?

Base: Those who have not paid for **online digital content in the last year** (various)
* those saying they were very or somewhat likely to pay in the future for brands they liked

/// REASONS FOR SUBSCRIPTION – AND REASONS FOR STAYING

In this year's report, we've also explored the motivations for online payment in a number of countries (US, UK, Germany, Spain, and Finland).

Alongside the quality of content, important factors in getting people to subscribe in the first place seem to be a desire to access favourite content anytime on any platform, combined with a fear of not being able to access that content for free. It is not surprising, then, that news publisher marketing efforts have focused on pushing their paid smartphone and tablet options heavily as part of the drive for wider bundled print and digital subscriptions.

In contrast, our survey suggests that *keeping* subscribers tends to be more about the actual experience of the content, along with its quality. The quality of individual writers is a particularly important factor in France and the United States, both countries where journalists have traditionally had a high profile.

It appears that the process of subscribing tends to reinforce the value placed by readers in the brand and its writers – either through the increased usage of the brand, a rationalisation of the decision to pay, or because paid content is valued more highly.

See Essay: Robert Picard, New Approaches to Paid Digital Content, p. 80.

REASONS FOR SIGNING UP FOR ONLINE NEWS SUBSCRIPTION – SELECTED

	UK	GER	SPN	FRA	FIN	US
A BRAND I PREFER FOR NEWS	35%	34%	23%	31%	23%	33%
BROAD RANGE OF NEWS COVERAGE	46%	26%	42%	49%	46%	47%
QUALITY OF SPECIFIC COLUMNISTS, WRITERS AND JOURNALISTS	31%	22%	34%	**40%**	11%	**35%**
ENABLES ACCESS WHEREVER AND WHENEVER I WANT	42%	43%	37%	39%	**63%**	49%
NO OTHER WAY TO ACCESS VALUED CONTENT	16%	**24%**	15%	19%	9%	20%

Q7b. What were the most important factors in taking out an online news subscription?

Base: All who subscribe UK=93, Germany=93, Spain=83, France=103, Finland=131, US=171

Showing selected responses. We also asked about Access to special offers/subscribers' club and the quality of a specific section

/// SOCIAL MEDIA AND THE NEWS

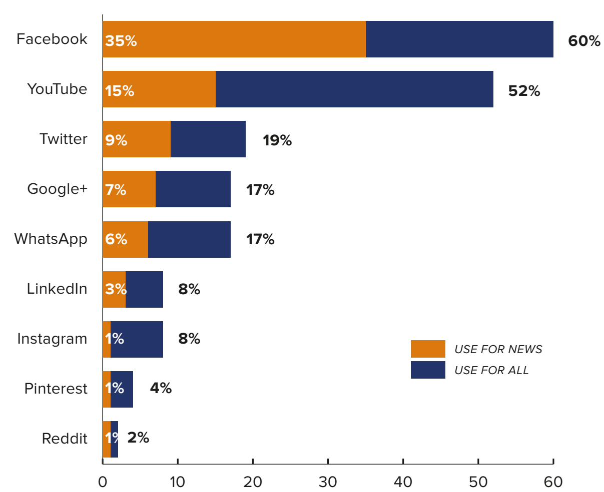
This year's report contains new and unique data on the extent to which different social networks are used for news in particular countries – along with evidence about their role in sharing and discovery around breaking news.

In aggregate Facebook is by far the biggest network with 60% using it for any purpose and over a third of our sample (35%) saying they used it for news. The popularity of other networks, however, like Twitter, Google+, YouTube, WhatsApp, and Reddit varies considerably.

Twitter is widely used in Spain (21%), the UK (12%), and US (8%) – in part because leading broadcasters (BBC, CNN) and newspapers (*El País, New York Times, Guardian*) have promoted its use in wider coverage. By contrast it is less used in Germany (3%) and Finland (6%) where Google+ is twice as popular for news.

YouTube is heavily used for news in Italy (23%), France (16%), and the US (17%) but much less in the UK (6%) and Denmark (5%). Strong brands in countries like the UK have been reluctant to put too much video content onto YouTube, hoping they can continue to attract users directly to their

TOP SOCIAL NETWORKS AND TOP NETWORKS FOR NEWS – ALL COUNTRIES



Q12a/b. Which, if any, of the following have you used for any purpose/for news in the last week?

Base: All markets = 18859

own websites. The age profiles for news are also significantly different everywhere, with Facebook broadly representative of all ages and Twitter focused on younger groups

In Spain 60% of our sample use WhatsApp and 26% said they are using it for news, with *El País* the first major Spanish site to enable direct sharing. We also see high usage in Germany and Italy.

But our research also reveals other important networks and social aggregators. In Finland there are two important local networks: Suomi 24 (8%) and Ampparit (12%). In Brazil, Orkut is still used by 12% of the population. Japan has popular networks such as Mixi, and Line, while Germany has a number of networks including Xing for business connections.

See section 4.4 for social media statistics and analysis by country, p. 70.

/// GATEWAYS AND NEWS DISCOVERY

A key issue for the industry is the extent to which news brands are being disaggregated by search engines, social networks, and portals. Our 2014 results again highlight the very different habits around news discovery across our countries.

In UK, Denmark, and Finland, countries with strong news brands, users tend to start their journeys with a trusted news provider, but it is a very different picture elsewhere, with search still the main gateway in France, Germany, Italy, the US, and Brazil.

In Italy, Google News is accessed by 25% of weekly online news users and in Germany by 11% compared with only 2% in Finland and 5% in the UK. These international differences are at the heart of the current battles over the role of aggregators like Google in the European market.

On the other hand our data also reveal how search is helping users get quickly to favourite brands. In breaking down different types of search query we find that more than half (56%) relate to navigation to a particular website. Effectively these are ‘pass-throughs’ to a trusted brand.

In terms of social media, we asked additional questions in the UK about how networks like Facebook and Twitter are used for news discovery. Of those consumers who use Twitter for news, our UK survey shows they are highly active during an average week

- 57% click further to read or watch (story, video, or picture)
- 60% actively share or favourite or comment on the news
- 65% check their newsfeed to see what’s new

Of those who use Facebook for news, respondents show broadly similar types of engagement. They are, however, significantly less likely to click on a news story than Twitter users (though the aggregate effect is bigger because of the number of users). They are more likely to click on a news video.

Twitter and Reddit have amongst the highest proportion accessing news (around 50% of their users use them for news each week) reinforcing their reputation as influencer networks and for surfacing news.

Amongst those respondents in the UK who used social networks for discovering an important breaking story such as a natural disaster or political crisis, 65% said they would turn to Twitter and 54% to Facebook – even though Facebook has three times as many users in general.

See Essay: Alison Preston, Gateways and Journeys to the News: UK Case Study, p. 83

Working with polling partner YouGov, we have also analysed UK social media usage in Twitter. This shows that media brands or journalists post much of the content that is discovered and valued in Twitter. Our analysis shows that 64% of people on Twitter in the UK (c.5.4 million) get news from one or more type of ‘news account’, with 48% of them following a journalist, two in five (40%) following a breaking news account and just over one in three (35%) following a general news brand.

See Essay: Shaun Austin, How News and Stories are Followed on Twitter, p. 87.

TOP GATEWAYS TO NEWS – % FINDING BY BRAND, SEARCH, SOCIAL NETWORK, AND EMAIL

	US	UK	GER	FR	DEN	FIN	SPA	ITA	BRA	JAP
BRAND	33%	**45%**	27%	22%	**46%**	**57%**	**46%**	39%	46%	20%
SEARCH	40%	29%	**42%**	**40%**	15%	26%	35%	**59%**	**59%**	41%
SOCIAL	28%	17%	15%	14%	16%	24%	38%	34%	46%	12%
EMAIL	27%	9%	12%	24%	16%	11%	12%	12%	22%	18%

Q10. Which were the ways in which you came across news stories LAST WEEK? (Please select all that apply)

Base: Total sample per country

/// SHARING AND PARTICIPATION

In total 16% of our UK sample share a news story via a social network (12%) or email (6%). This hasn't changed much in three years. The figures are considerably higher in the US, Italy, and Spain.

Young people are more likely to share or comment using social networks whereas older groups are more likely to share news via email and comment on a news site. But apart from the tools they use, the overall desire to talk about and share news appears to be affected more by national culture than by age.

TOP SHARING NATIONS – % SHARING VIA EMAIL OR SOCIAL NETWORK WEEKLY

	COUNTRY	%		COUNTRY	%
1	**BRAZIL**	54%	6	**DENMARK**	23%
2	**ITALY**	44%	7	**FRANCE**	21%
3	**SPAIN**	40%	8	**GERMANY**	19%
4	**US**	35%	9	**UK**	16%
5	**FINLAND**	24%	10	**JAPAN**	10%

/// THE RISE OF VISUAL JOURNALISM

FORMATS OF NEWS CONSUMED WEEKLY BY COUNTRY

	US	UK	GER	FRA	DEN	FIN	SPA	ITA	BRA	JAP
LISTS/STORIES	72%	68%	69%	71%	58%	80%	73%	84%	81%	85%
VIDEO/AUDIO	**34%**	18%	21%	18%	22%	23%	33%	31%	**32%**	11%
LIVE PAGES	9%	8%	6%	8%	7%	7%	12%	15%	18%	12%
PICTURES/GRAPHICS	24%	15%	25%	19%	8%	23%	23%	20%	32%	25%

Q11. Thinking of the way you looked at news online in the last week which of the following ways of consuming news did you use?
Base: Total country samples

Over the last year newspapers, broadcasters, and digital pure players have been producing more visual content, pictures, data-rich charts, animated gifs, and video itself. This is partly because of the multimedia capabilities of new devices, partly because distinctive visual content works well in social media – but also for commercial reasons. Video in particular is attracting much higher advertising premiums.

Despite this, our research shows that, for the moment at least, most users remain wedded to words (traditional articles and lists), though we do find that pictures and videos are relatively more important in the US, Brazil, and southern European countries like Italy and Spain.

This year we asked a number of additional questions about the appeal of video content in five countries (UK, US, Spain, Germany, and Finland) and the balance between text and video content.

In most of these countries we found just a small percentage (10% at most) that prefer online news to be video-led. Some of these are to be found in the United States where services like NowThisNews and Vice News have been gaining traction and where newspapers like the *New York Times* and *Wall Street Journal* have expanded video teams considerably. But even here, more than two-thirds of our sample (70%) only consume or mostly consume news in text. Our research into video also shows that many users are put off by technical problems and by small screen size.

News clips that add context to a text story are valued most by users. In terms of topics, videos about celebrity, fun, and sports news are especially popular, while local news video content is rarely consumed despite a high level of general interest.

See section 4.2 for video news popularity in five countries, p. 65.

24% would rather watch on a bigger screen

18% video doesn't work or takes too long to play

/// IMPARTIAL NEWS AND THE VALUE OF REPORTERS VS BRANDS

This year we have also explored whether traditional journalistic disciplines of objectivity and impartiality are still relevant or wanted in a digital news environment.

Some practitioners like the blogger and political journalist Glenn Greenwald have suggested a new approach in which journalists should argue a particular point of view – while being open about their sources and their biases.

Our survey suggests that consumers at this stage strongly prefer traditional approaches. This may be because their views are shaped by what they already know but most respondents support the notion that a reporter's job is to present a range of views and let the reader/viewer decide – especially in the UK and Germany. However nearly a third of Italian consumers prefer a reporter to argue a particular point of view, reflecting the more partisan journalistic practice of parts of the media there.

In addition our survey showed that audiences TRUST sources more that try to be neutral over those that are open about their views and biases.

We also looked at the issue of whether, as some commentators[3] have argued, individual journalists are overtaking the organisation as key drivers of trust and engagement. We see some support for that view particularly in France, Spain, and the US – whereas we find the brand itself is a more important driver in the UK, Japan, Denmark, and Finland.

The growing importance of individual reporters has been fuelled by the ease with which new enterprises can be set up and distribute content in the internet era. In the US in particular we see increasingly successful news organisations such as Business Insider (Henry Blodget), the Daily Dish (Andrew Sullivan), Vox Media (Ezra Klein) that are built around their journalistic stars. In most other countries, newspaper columnists and high-profile reporters still largely ride on the coat tails of established brands for traffic and reach.

See Essay: Richard Sambrook, Objectivity and Impartiality for Digital News Consumers, p. 76.

DO YOU PREFER NEWS WITH RANGE OF VIEWS VS NEWS THAT ARGUES A PARTICULAR VIEW?

	US	UK	GER	FRA	DEN	FIN	SPA	ITA	BRA	JAP
RANGE OF VIEWS	79%	85%	87%	88%	74%	73%	81%	**69%**	71%	81%
PARTICULAR VIEW	21%	15%	13%	12%	26%	27%	19%	**31%**	29%	19%

Q5c. Thinking about different kinds of news available to you, do you prefer where the reporter tries to reflect...
Base: Total country samples

IMPORTANCE OF BRAND AND JOURNALIST IN CREATING TRUST

	US	UK	GER	FRA	DEN	FIN	SPA	ITA	BRA	JAP
BRAND IMPORTANT	57%	63%	64%	63%	57%	57%	55%	72%	82%	37%
JOURNALIST IMPORTANT	53%	44%	35%	60%	40%	31%	60%	66%	72%	31%

Q5e. To what extent are the following important to you in terms of whether you trust a source of news. Net important = those responding quite or very important
Base: Total country samples

/// RISE OF NEW PLAYERS AND SOCIAL AGGREGATORS AND THE GROWTH OF WEIRD NEWS

Across the world we are seeing the rising impact of pure players that are bringing a new tone of voice and innovations in format and business models. Some are now international players creating new disruption in many of our surveyed countries. The Huffington Post operates 11 international editions, many of which are joint enterprises with traditional news groups such as Le Monde in France and L'Espresso group in Italy. Buzzfeed runs sites in the UK and Germany and has recently launched versions in French, Spanish, and Portuguese.

[3] See the Tow Center, 'Post Industrial Journalism': http://towcenter.org/research/post-industrial-journalism.

HUFFINGTON POST AND BUZZFEED (WEEKLY USAGE) BY COUNTRY

	HUFF POST	BUZZFEED
US	17%	5%
UK	9%	3%
ITALY	5%	-
FRANCE	5%	1%
SPAIN	4%	1%
GERMANY	3%	<1%
BRAZIL	-	1%

Q5b. Which, if any, of the following have you used to access news in the last week? Showing answers for Huff Post and Buzzfeed only

Base: Total country samples

These sites attract younger audiences and generate much of their traffic from mobile and social media. They have also been experimenting with new 'native' advertising formats where sponsored messages appear as part of the content itself.

Part of their appeal is the 'fun' nature of much of the content, which is mixed with more serious news stories. In this year's survey we have tracked this new category of Fun or Weird news for the first time. Overall, we find this category is accessed more often than celebrity and entertainment news. It is particularly popular with Japanese (28%), French (22%), and Italians (21%) and is mainly driven by young men and women – whereas entertainment and celebrity news skews heavily towards 18–35-year-old women.

See section 2.4, for types of news by country including fun news, pp. 50-1.

These latest disruptions from social sharing sites come on top of Web 1.0 portals and aggregators such as Yahoo, MSN, and Google News. Google News is the most accessed news website in Italy and also a leading player in France and Germany. In combination, we see that in countries like the United States pure players and aggregators now attract almost as many users as traditional media online. Japan is a special case where Yahoo holds over 60% of the market and where the national broadcaster NHK has been restricted in its internet activities. Strong brands have done well in the UK, while in Finland – protected by language and by the relatively small size of its market – there is far less disruption (see chart at bottom of page).

In this year's report we have also looked in particular detail at the position of newspapers which play an important role in democratic countries – not least because they still employ the vast majority of journalists creating original content. Overall we find that cross-platform reach (print and online) still averages around 75% in most countries but online-only newspaper reach varies wildly from 31% in Japan to 82% in Finland.

See section 1.11, Comparative Brand Data Analysis, for disrupted newspaper sector and cross-platform reach by country, p. 40.

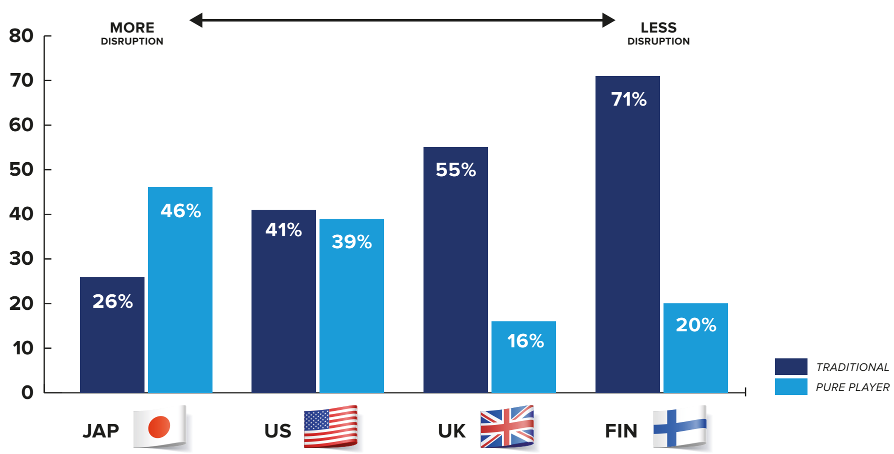
FUN NEWS VS ENTERTAINMENT NEWS BY COUNTRY

	UK	GER	SPA	ITA	FRA	DEN	FIN	US	BRA	JAP
FUN/WEIRD NEWS	15%	14%	18%	21%	22%	18%	14%	16%	15%	28%
ENTERTAINMENT AND CELEBRITY NEWS	17%	15%	14%	13%	13%	12%	16%	15%	22%	24%

Q2. Which of the following types of news is most important to you? (Please choose up to five options.)

Base: Total country samples

TRADITIONAL BRAND WEBSITES VS PURE PLAYERS AND AGGREGATORS – SELECTED COUNTRIES



Q3. Which, if any, of the following have you used in the last week as a source of news?

Base: UK=2082, Finland=1520, US=2197, Japan=1973

/// CONCLUSION

This year's data represent to some extent a continuation of trends we have seen before, but in combination the impact feels more intense. With many news organisations now getting the majority of their web traffic from mobile and tablets there is a growing realisation that this is just the start of a new wave of disruption.

The smartphone is pushing the internet into a more personal space and extending our access points for news and information. Tablets are offering new possibilities for monetisation but in these converged multimedia spaces news is just one form of content competing for attention with all the rest.

Media companies are rethinking their strategies to fit new platforms and changing needs, but for many this remains a battle for survival. There are new opportunities everywhere but also dynamic competitors emerging with fresh thinking. Money must be found to invest in new products but older groups still want news delivered in a traditional way. Embracing digital is clearly the future, but news brands can't afford to leave behind groups who still carry huge influence and drive most of the revenue.

Like last year we also see the uneven nature of digital change both between and within countries. We see how some countries are protected to a degree by culture, language, or regulation, while others face the full force of digital competition. We see everywhere how young people are finding, consuming, and sharing news and information in very different ways – putting mobile and online first.

And yet in this web of contradictions we find evidence that trusted news brands and trusted reporters remain important to almost everybody. The names of those brands may be changing, along with the means of delivery, but notions of credibility, immediacy, and relevance remain core ingredients of success.

ANALYSIS BY COUNTRY

In this section we publish some data tables from our 2014 survey. We start with a *country-based* view of the findings, which includes a brief overview of media characteristics and the most important data points in terms of digital news.

This includes an overview of consumption in each country, including details of the most popular news brands – traditional and online. The pages also contain statistics about the use of new devices such as smartphones and tablets and the role of different social networks for news. All information is drawn from the 2014 *Digital News Report* survey using the methodology outlined on p. 6, with the exception of population and internet levels which are drawn from *Internet World Statistics* (2012).

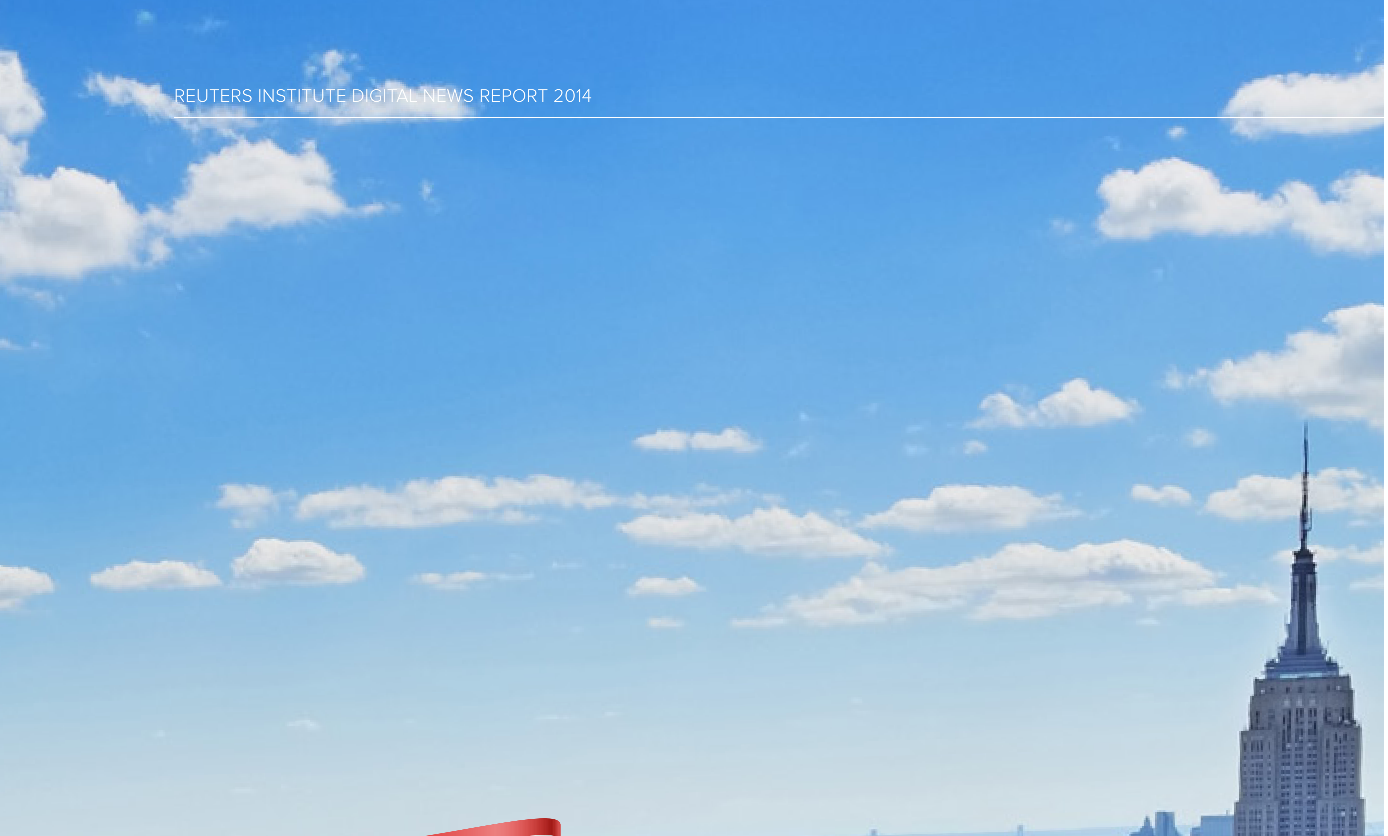
Whilst most of our countries see internet penetration of 80% or more, Italy and Brazil in particular have far lower levels of access. In those countries we are looking at the habits of around (or less than) half the adult population. It should also be noted that the Brazilian sample is (uniquely) an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

Figures around digital and cross-platform weekly reach are derived from tagging of a list of specific news sources (online and offline) – around 40 per country. This method will tend to under-report the long tail of sources.

We have not included the cross-platform figures for countries with low internet penetration such as Urban Brazil and Italy. On the other hand, we find the international comparisons between countries with similar rates of internet access to be illuminating even if the precise numbers should be treated with some caution.

In subsequent sections, we explore the key parts of our survey illustrated by more detailed charts and tables – alongside commentary to explain their significance.

The full questionnaire, additional charts and tables – plus the raw data – are available from our website www.digitalnewsreport.org.



UNITED STATES

STATISTICS

Population	314m
Internet	78%
Smartphone	50%
Tablet	34%
Interest in news	68% (7th /10)

The US media environment is highly commercial and highly competitive. A range of television broadcasters, cable channels, prestigious newspapers, and websites compete in covering news and current affairs for a national audience. State and local issues are covered by local television stations, struggling metropolitan newspapers, as well as a growing number of online-only news outlets. Public media based on a combination of government appropriations, donations from users, and corporate sponsorship offer additional content to niche audiences both locally and nationally.

The US has high levels of internet, smartphone, and tablet use, but has been overtaken in terms of digital media use by some Western European and Asian countries. Pure players like Yahoo News, MSN, and the Huffington Post have considerable reach online, as have the cable news channels, and local television stations and local newspapers. Despite their reputation, nationally distributed newspapers like *USA Today*, the *Wall Street Journal*, and the *New York Times* count only a modest part of the population amongst their online audience (the first operates a free model, the two others different kinds of paywall).

The US media environment stands apart from most other countries in this report by virtue of the size of the market and the stand-out success of a limited number of pure players who have established themselves as significant parts of the news system.

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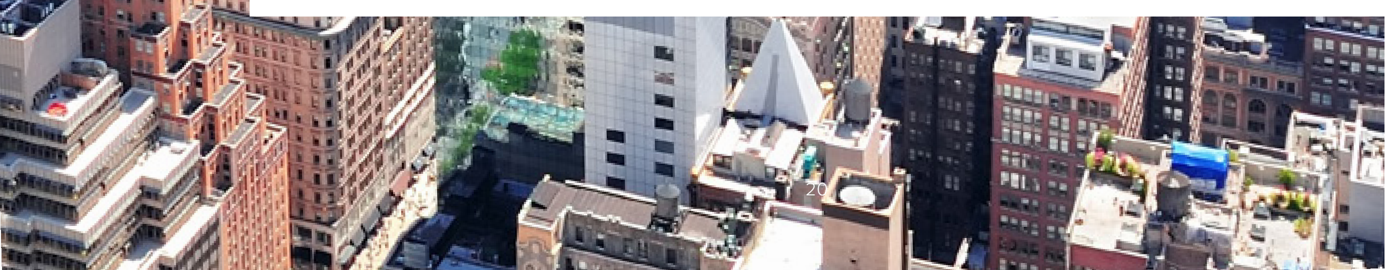
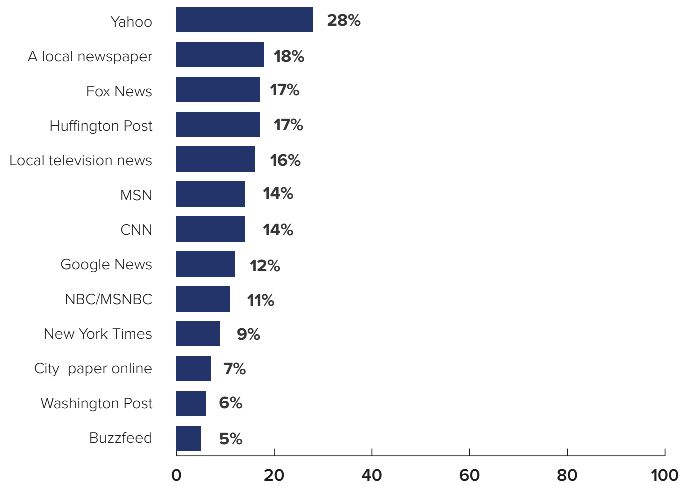
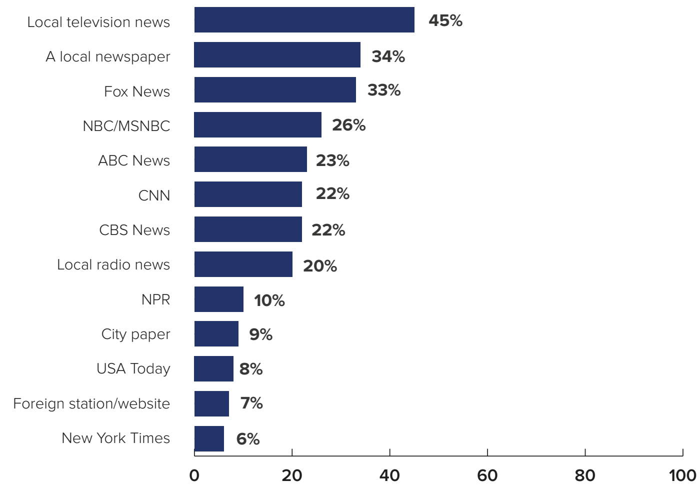


TOP BRANDS – WEEKLY USAGE

ONLINE



OFFLINE



DIGITAL REACH

Newspapers	**33%**
Broadcasters	**48%**
Pure players	**52%**

CROSS PLATFORM REACH

Newspapers	**58%**
Broadcasters	**86%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**49%**
Broadcasters	**82%**

TOP SOCIAL NETWORKS*

Facebook	**37%**
YouTube	**17%**
Twitter	**8%**
Google+	**5%**
LinkedIn	**3%**
Reddit	**2%**

* used weekly for news

Social media like Facebook and YouTube are very widely used in US, to access, find, and engage with news. Twitter has a larger user base than in much of Western Europe, and is used by almost a third of the online 'news lovers' as a way of accessing and engaging with news. Both Twitter and Reddit played an important role in the coverage of stories such as Hurricane Sandy and the Boston bombings.

35% get news on at least two digital devices

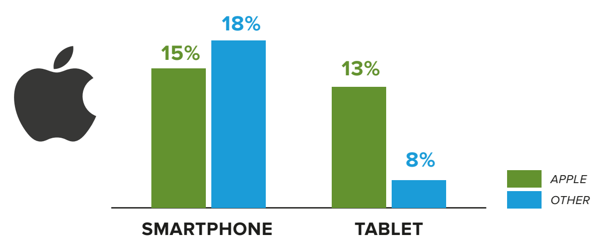
12% use three or more digital devices

TOP DIGITAL SUBSCRIPTIONS

1. Local/City Newspaper
2. New York Times
3. Wall Street Journal

11% pay for online news last year (5th /10)

APPLE DEVICES VS THE REST (NEWS USAGE)



DIGITAL PARTICIPATION

35% share a news story via email or social media each week. US is **4th out of 10** in overall participation

17% say the mobile is the main way of accessing online news

10% say the tablet is the main way of accessing online news

UNITED KINGDOM

STATISTICS

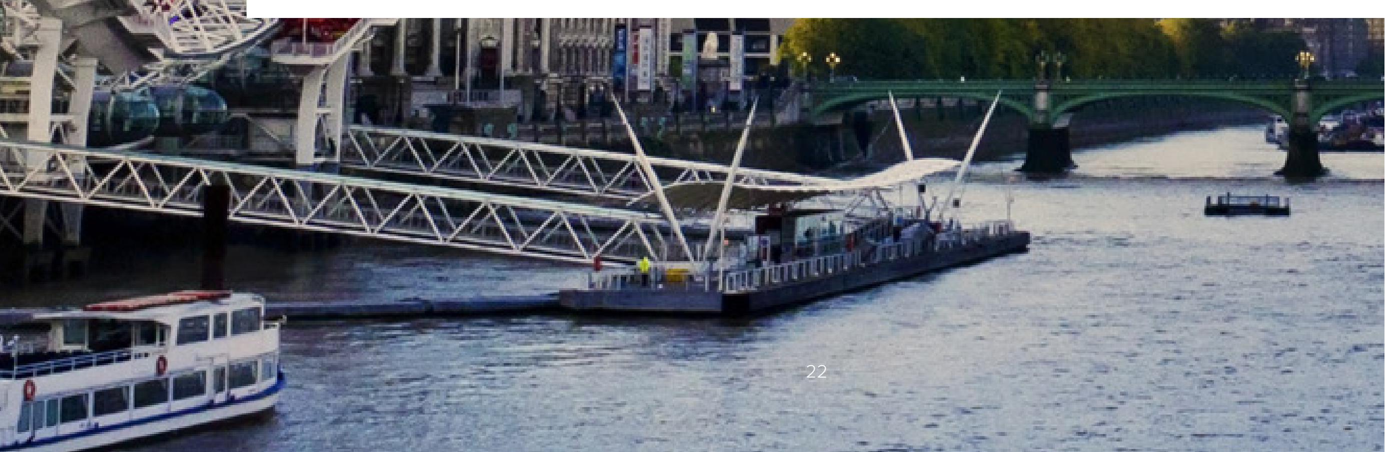
Population	63m
Internet	84%
Smartphone	62%
Tablet	42%
Interest in news	64% (9th /10)

The media environment is characterised by a vigorous and highly competitive national press – including a strong tabloid sector accounting for the majority of newspapers sold daily – and the best-known public broadcaster in the world. BBC News reaches more than three-quarters of all consumers each week across radio, TV, and online.

BBC News continues to dominate online news usage across all platforms, with more than half of its traffic now coming from smartphone or tablet. Mail Online is the largest newspaper website in the UK and along with the Guardian is pursuing a bold (global) strategy of free access supported by advertising. Both charge for tablet editions and are considering adding more premium services.

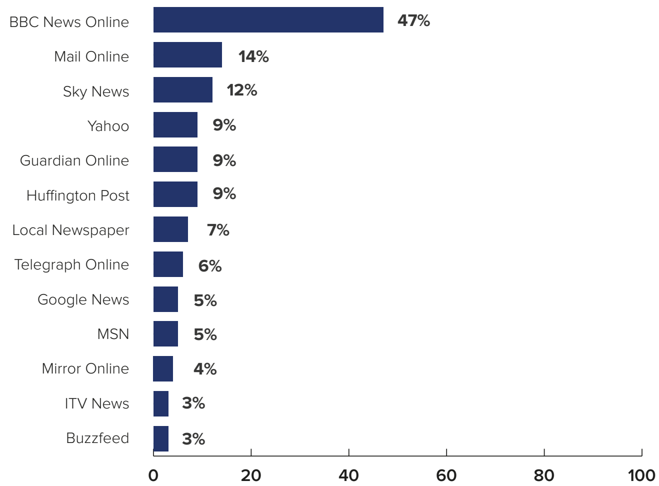
The *Sun* and the *Telegraph* adopted paywalls in 2013 with *The Times* reporting more than 150,000 paying digital subscribers. The *Telegraph's* metered model has not significantly affected reach but the *Sun's* overall traffic is down considerably from last year. Both the Huffington Post and Buzzfeed run UK editions with a tone and style that appeals particularly to younger audiences.

NN

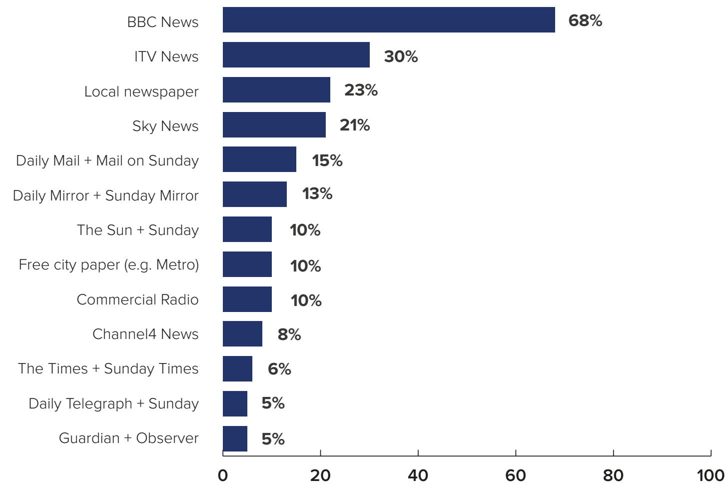


TOP BRANDS – WEEKLY USAGE

ONLINE



OFFLINE



DIGITAL REACH

Newspapers	**35%**
Broadcasters	**53%**
Pure players	**24%**

CROSS PLATFORM REACH

Newspapers	**72%**
Broadcasters	**87%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**61%**
Broadcasters	**79%**

TOP SOCIAL NETWORKS*

Facebook	**22%**
Twitter	**12%**
YouTube	**6%**
Google+	**2%**
WhatsApp	**2%**

* used weekly for news

Twitter is widely used by journalists, PR, and media in the UK and is heavily promoted by television and newspapers. It is particularly popular with young people. Facebook is more important for referrals to news sites overall and Reddit also provides significant traffic on particular stories. News organisations are beginning to experiment with new chat based networks such as WhatsApp.

35%
get news on at least two digital devices

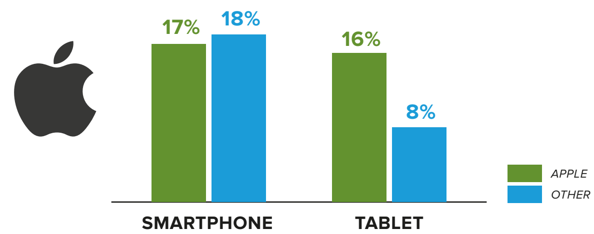
10%
use three or more digital devices

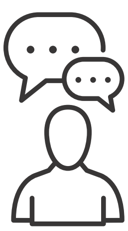
TOP DIGITAL SUBSCRIPTIONS

1. Times
2. Telegraph
3. Sun

7%
pay for online news last year (10th /10)

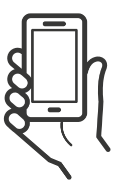
APPLE DEVICES VS THE REST (NEWS USAGE)





DIGITAL PARTICIPATION

16% share a news story via email or social media each week. UK is **8th out of 10** in overall participation



24%
say the mobile is the main way of accessing online news

16%
say the tablet is the main way of accessing online news

GERMANY

STATISTICS

Population	81m
Internet	83%
Smartphone	60%
Tablet	30%
Interest in news	81% (2nd /10)

The country's federal structure has shaped its media environment, with a number of regional and national public broadcasters competing for audiences with powerful commercial operators. Each of the 16 regions regulates its own private and public broadcasting. Germany is home to some of the world's largest media conglomerates, including Bertelsmann and the publisher Axel Springer.

There are several national newspapers, but the press market is strongest at a regional level, with more than 300 titles. Newspapers and magazines have also taken a lead online, with public service broadcasters facing restrictions on the extent of their digital activities.

In response to declining sales of newspapers and magazines, a number of publishers in Germany have been experimenting with new models of paid online content. This may be on a pay-per-issue basis (*Die Zeit*), via subscription (BILDplus), or as voluntary payment for single articles (TAZ).

Due to the variety of models there has been little chance for audiences to get used to any of the different models and become accustomed to the respective patterns of usage and payment. Over the past year, the number of people who have paid for online news has remained stable and there is only a slight increase in the likelihood that those who did not pay might do so in the future (2013: 9%, 2014: 15%).

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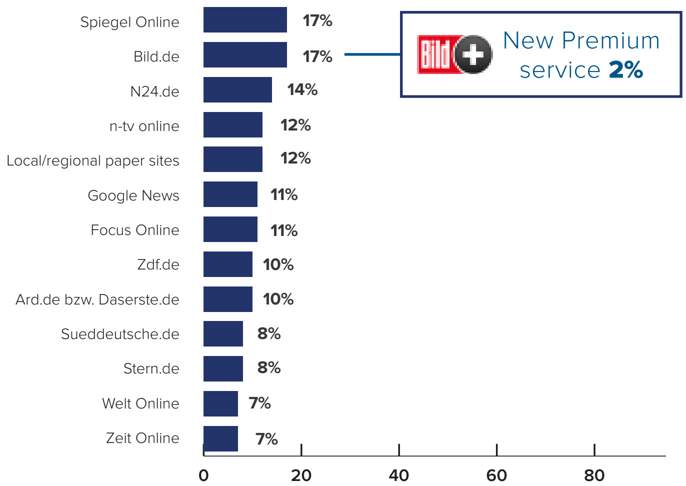
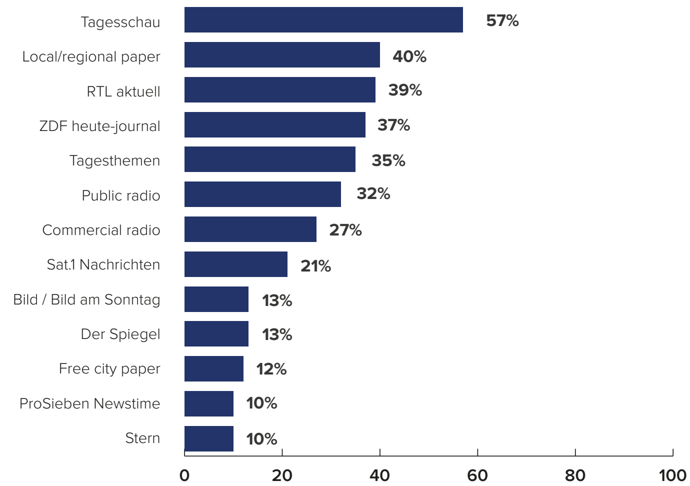
TOP BRANDS – WEEKLY USAGE

ONLINE



OFFLINE



DIGITAL REACH

Newspapers	**48%**
Broadcasters	**37%**
Pure players	**32%**

CROSS PLATFORM REACH

Newspapers	**73%**
Broadcasters	**93%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**62%**
Broadcasters	**91%**

TOP SOCIAL NETWORKS*

Facebook	**26%**
YouTube	**11%**
Google+	**6%**
WhatsApp	**6%**
Twitter	**3%**
Xing	**3%**

* used weekly for news

Germans are generally less interested in news-related participation via social media than people in other countries. Facebook is the biggest network for news, and yet in public discussions as well as in the strategies of political parties and advertising agencies Twitter gets a lot of attention. Because those tweeting are particularly communicative and their contributions get attention from other news media, their resonance in the public arena is very high.

32%
get news on at least two digital devices

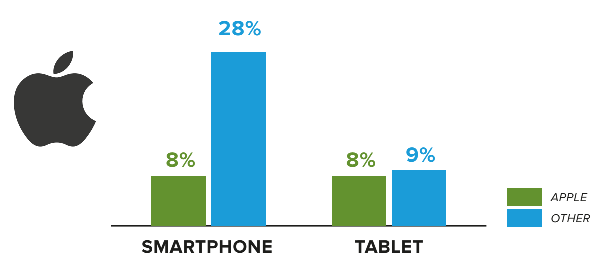
10%
use three or more digital devices

TOP DIGITAL SUBSCRIPTIONS

1. Bild Plus
2. Welt Online
3. Spiegel Magazin digital

8%
pay for online news last year (7th /10)

APPLE DEVICES VS THE REST (NEWS USAGE)



DIGITAL PARTICIPATION

19% share a news story via email or social media each week. Germany is **7th out of 10** in overall participation

24%
say the mobile is the main way of accessing online news

9%
say the tablet is the main way of accessing online news

FRANCE

Television news remains strong with viewership split between France Télévisions, privately owned TF1, and a range of cable and satellite providers. France's long-established commercial radio, particularly RTL and Europe 1, commands large audiences, along with a range of publicly funded stations. The newspaper sector is particularly weak and remains partly dependent on state subsidies amidst falling sales and advertising revenue. Online, many of the best known national titles such as *Le Monde* and *Le Figaro* face stiff competition from born digital media.

STATISTICS

Population	66m
Internet	80%
Smartphone	52%
Tablet	27%
Interest in news	64% (10th /10)

Google is a major player in France with a big online reach for Google News (see chart opposite). The company makes an estimated €3.9 million of revenue per day, leading to cries of foul play from the French legacy media and public concern over the level of tax contributions. In response, Google set up in February 2013 a $60m innovation fund to 'help support transformative digital publishing initiatives'.

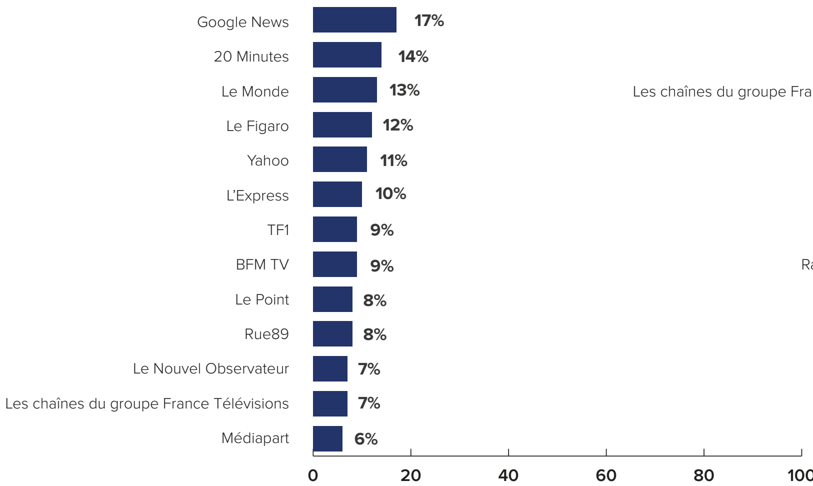
Online, there is strong growth with a vibrant mix of aggregators, free real-time news websites like 20minutes.fr and born digital media – alongside traditional titles such as lefigaro.fr, lemonde.fr, and leparisien.fr.

A new wave of US-led disruption has come from Buzzfeed which launched a French version in November 2013, and the Huffington Post. Among French pure players, Mediapart is the most successful, with 84,000 subscribers for its mix of online investigation and opinion. Lemonde.fr is aiming for 200,000 by 2015.

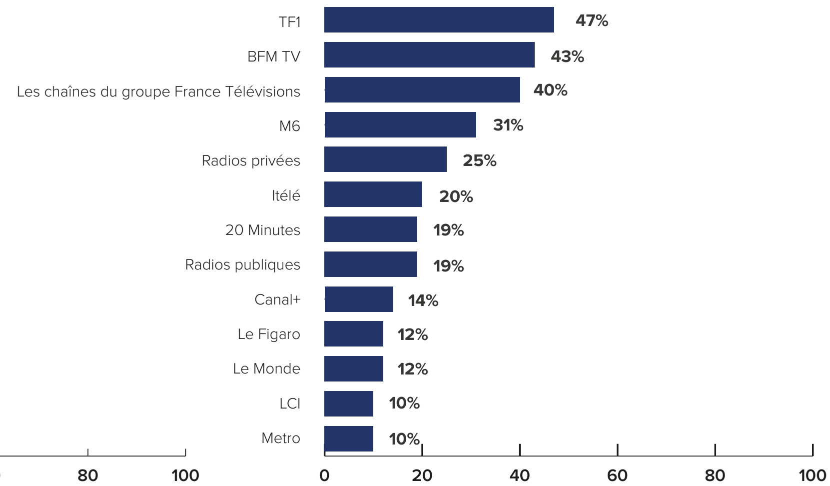
AA

TOP BRANDS – WEEKLY USAGE

ONLINE



OFFLINE



DIGITAL REACH

Newspapers	**40%**
Broadcasters	**29%**
Pure players	**34%**

CROSS PLATFORM REACH

Newspapers	**55%**
Broadcasters	**92%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**44%**
Broadcasters	**90%**

TOP SOCIAL NETWORKS*

Facebook	**27%**
YouTube	**16%**
Google+	**10%**
Twitter	**7%**
Skype	**4%**

* used weekly for news

Twitter has been a key network for journalists and politics, but since the Valerie Trierweiler 'tweetgate' affair in 2012, the government has become more cautious in its use.[4] Social media were popular during the French municipal elections in March 2014 but overall French people tend to be more passive around news than their European colleagues while being active around TV shows where they are more ready to comment and share.

34%
get news on at least two digital devices

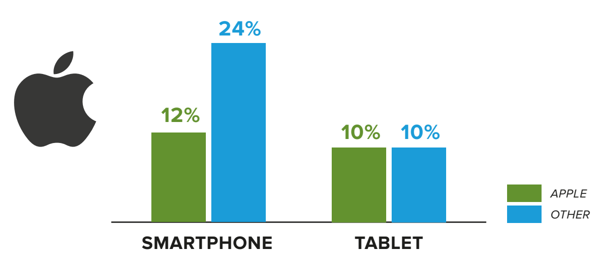
9%
use three or more digital devices

TOP DIGITAL SUBSCRIPTIONS

1. Le Monde
2. Mediapart

12%
pay for online news last year (4th /10)

APPLE DEVICES VS THE REST (NEWS USAGE)



DIGITAL PARTICIPATION

21% share a news story via email or social media each week. France is **9th out of 10** in overall participation

22%
say the mobile is the main way of accessing online news

8%
say the tablet is the main way of accessing online news

[4] When the President's partner used her Twitter account to tweet in support of a dissident socialist standing against the official Socialist Party candidate (his former partner, Ségolène Royale) in parliamentary elections.

DENMARK

The Danish media environment is characterised by a combination of strong domestic broadcasters and newspapers. Two state-owned broadcasters, one a licence-fee funded public service broadcaster (DR), and the other a public service broadcaster funded mostly by advertising sales and subscription fees (TV2), dominate broadcast news and have a wide reach via digital platforms. A number of commercial TV channels have a significant audience share for entertainment but offer no news. A diverse national press has a strong position online while regional and local papers remain important in their respective markets but have more limited digital reach.

STATISTICS

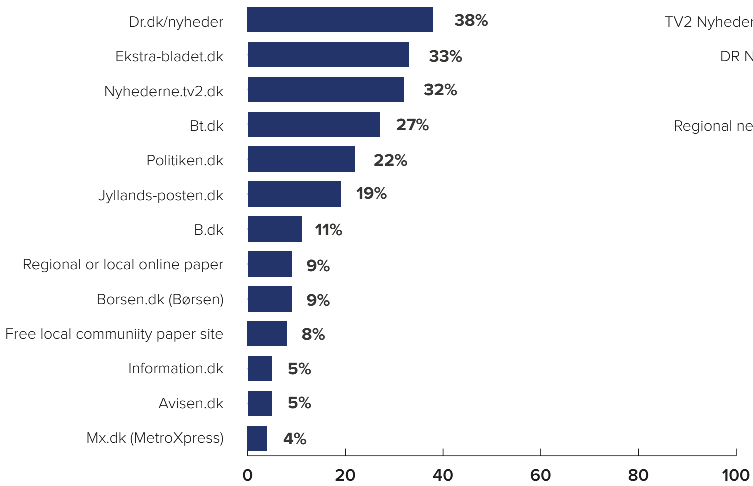
Population	5.5m
Internet	90%
Smartphone	73%
Tablet	46%
Interest in news	71% (5th /10)

Denmark has very high levels of internet, smartphone, and tablet use, and the media environment is rapidly digitizing. The two public service broadcasters compete head-to-head with newspapers for online news readers. Despite the recent introduction of various forms of pay models, the most successful newspaper websites – especially tabloid – still reach an online news audience as large as or larger than the websites of the free public service broadcasters, but the industry is concerned over the long-term implications of a free PSB versus pay newspaper digital environment.

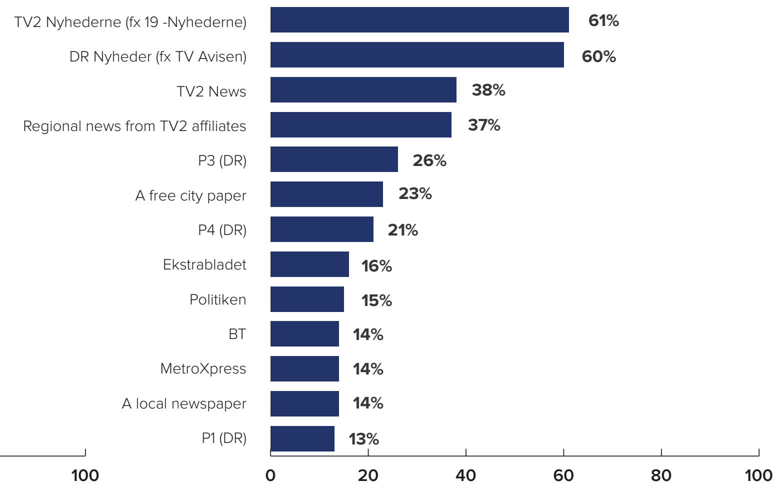
RKN and KCS

TOP BRANDS – WEEKLY USAGE

ONLINE



OFFLINE



DIGITAL REACH

Newspapers	**67%**
Broadcasters	**53%**
Pure players	**11%**

CROSS PLATFORM REACH

Newspapers	**83%**
Broadcasters	**93%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**67%**
Broadcasters	**90%**

TOP SOCIAL NETWORKS*

Facebook	**31%**
YouTube	**5%**
Twitter	**4%**
Google+	**4%**
LinkedIn	**4%**

* used weekly for news

Facebook and YouTube are very widely used in Denmark, but so far social media seem to play a limited role as a way of accessing, finding, and engaging with news. Twitter has been embraced by some journalists and politicians but is still a niche platform with a limited reach and base in the population at large.

57%
get news on at least two digital devices

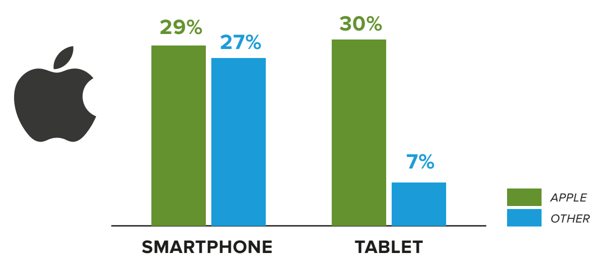
22%
use three or more digital devices

TYPES OF DIGITAL PAYMENT

17% one off payments
42% digital subscription
31% bundled digital/ print subscription

10%
pay for online news last year (6th /10)

APPLE DEVICES VS THE REST (NEWS USAGE)



DIGITAL PARTICIPATION

23% share a news story via email or social media each week. Denmark is **5th out of 10** in overall participation

24%
say the mobile is the main way of accessing online news

18%
say the tablet is the main way of accessing online news

FINLAND

The Finnish media environment is characterised by a strong regional press. Daily papers are mainly purchased by subscriptions, often covering both print and online editions. The two national afternoon tabloids both reach half of the population weekly (mainly online). Tax-funded Public Broadcasting Company YLE and commercial MTV3 dominate broadcast TV-news and have a wide reach via digital platforms.

STATISTICS

Population	5m
Internet	89%
Smartphone	60%
Tablet	34%
Interest in news	68% (6th /10)

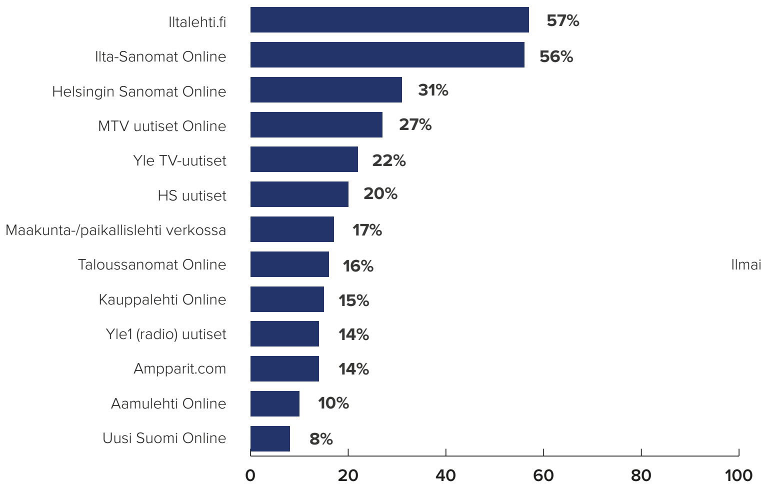
The two afternoon tabloids *Ilta-Sanomat* and *Iltalehti* dominate online news usage with a mainly free offering. The biggest daily, *Helsingin Sanomat*, erected a metered paywall at the end of 2012 (with five free items a week) but has retained a strong position online. Many other newspapers have also erected paywalls or are planning to do so in near future. The reasons for high digital reach of newspapers (82%) relate to the high volume of free content combined with soft paywalls, bundled subscriptions, and the strong Finnish reading tradition.

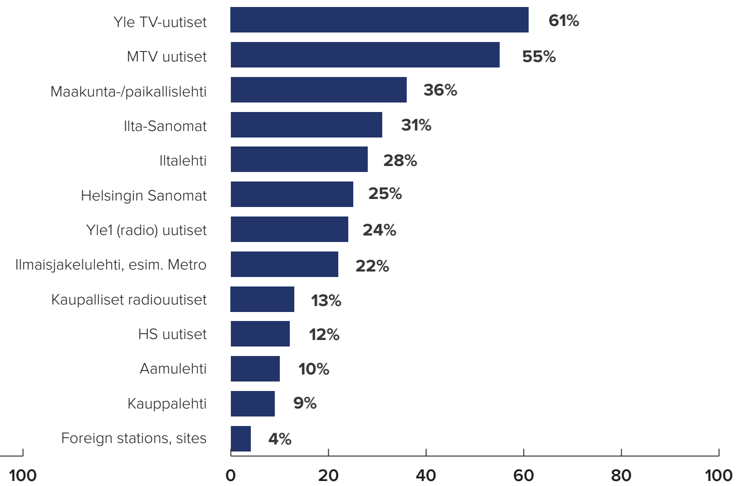
The Finnish language and small market seem to shield national news brands somewhat against some international competition. Google News, for example, has only 2% reach of weekly online news usage.

Newspaper reading via smartphones and tablets is growing fast. New digital platforms for newspaper reading are being developed in Finland with a prototype of a thin, flexible ‘LivePaper’ platform now in a pilot phase. Online delivery is especially important in Finland because of its sparse population and the long distances involved in physical distribution.

ER

TOP BRANDS – WEEKLY USAGE





DIGITAL REACH

Newspapers	**82%**
Broadcasters	**43%**
Pure players	**34%**

CROSS PLATFORM REACH

Newspapers	**93%**
Broadcasters	**84%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**79%**
Broadcasters	**80%**

TOP SOCIAL NETWORKS*

Facebook	**36%**
Ampparit	**12%**
Google+	**12%**
YouTube	**9%**
Suomi '24'	**8%**
Twitter	**6%**

* used weekly for news

Facebook is widely used for news in all age groups. News-aggregator Ampparit ranks second. It lists links to the newest and most popular news items of the Finnish news media. Suomi24 is the most popular general discussion forum in Finland. For journalists, the most important social media services are Facebook and Twitter.

49% get news on at least two digital devices

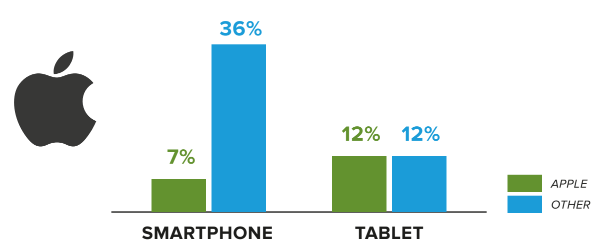
15% use three or more digital devices

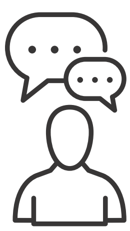
TOP DIGITAL SUBSCRIPTIONS

1. Helsingin Sanomat (hs.fi)
2. Regional/local newspaper(s)
3. Iltalehti.fi

14% pay for online news last year (2nd/ 10)

APPLE DEVICES VS THE REST (NEWS USAGE)





DIGITAL PARTICIPATION

24% share a news story via email or social media each week. Finland is **5th out of 10** in overall participation

15% say the mobile is the main way of accessing online news

9% say the tablet is the main way of accessing online news

SPAIN

STATISTICS

Population	47m
Internet	67%
Smartphone	73%
Tablet	38%
Interest in news	73% (3rd /10)

Spanish newspapers kept declining in 2013, both in terms of market share and advertising income. One consequence was the replacement of the editors at three big newspapers *El País*, *El Mundo*, and *La Vanguardia*. Nevertheless, the print market enjoyed the launch of lifestyle magazines such as *Forbes* and *Icon*, as well as some politically focused monthly periodicals. Mergers left the television market with two commercial operators. Closures affected media companies of all kinds, including a multimedia group (Intereconomía), a commercial radio network (ABC Punto Radio) and a regional public service broadcaster (Radiotelevisió Valenciana).

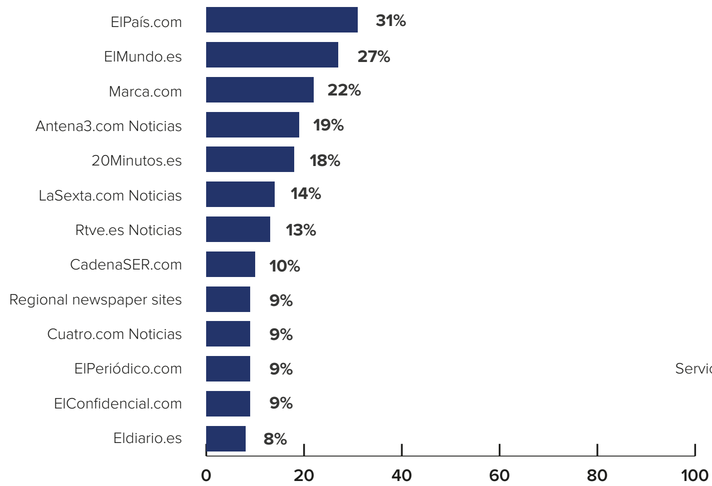
Decisions to charge for online news content in Spain are adversely affected by memories of the audience decline caused by the hard paywall erected by *El País* in November 2002 – withdrawn three years later. Since 2010, most have adopted a strategy of open and free-to-read websites, alongside e-replicas of print editions sold through digital newsstands. But inspired by the example of foreign newspapers, *El Mundo* introduced a soft paywall in November 2013, along with an evening app edition and a daily gossip tablet app.

Some regional sites like Lavanguardia.com now offer premium content via their websites while online-only sites such as Eldiario.es and Infolibre (published from Madrid) and Vilaweb (a Catalan online pioneer) have voluntary paid membership schemes, with previews and benefits for subscribers.

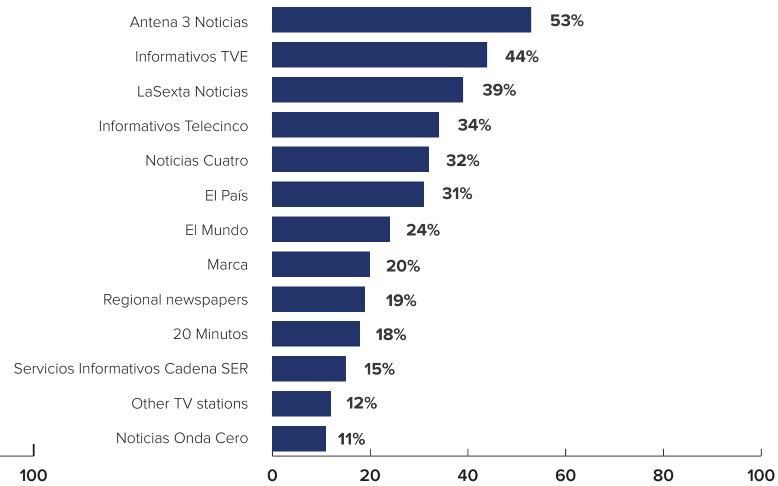
SN, RS and AAz

TOP BRANDS – WEEKLY USAGE

*ONLINE**



OFFLINE



DIGITAL REACH

Newspapers	**68%**
Broadcasters	**47%**
Pure players	**23%**

CROSS PLATFORM REACH

Newspapers	**81%**
Broadcasters	**93%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**70%**
Broadcasters	**91%**

TOP SOCIAL NETWORKS*

Facebook	**50%**
WhatsApp	**26%**
Twitter	**21%**
YouTube	**21%**
Google+	**10%**

* used weekly for news

A decade ago, online audiences started to engage with news in political blogs and forums, later in comment threads on news sites, and that tradition has made its way to social networks. Although TV current affairs shows promote hashtags relentlessly, Twitter comes third to more personal networks. *El País* claimed to be the first site to enable direct WhatsApp sharing.

43%
get news on at least two digital devices

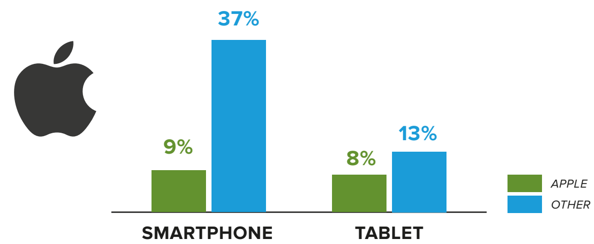
14%
use three or more digital devices

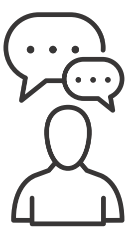
TOP DIGITAL SUBSCRIPTIONS

1. El Mundo.es
2. El Pais.com
3. Marca.com (sports)

8%
pay for online news last year (7th /10)

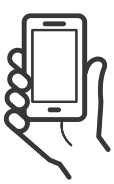
APPLE DEVICES VS THE REST (NEWS USAGE)





DIGITAL PARTICIPATION

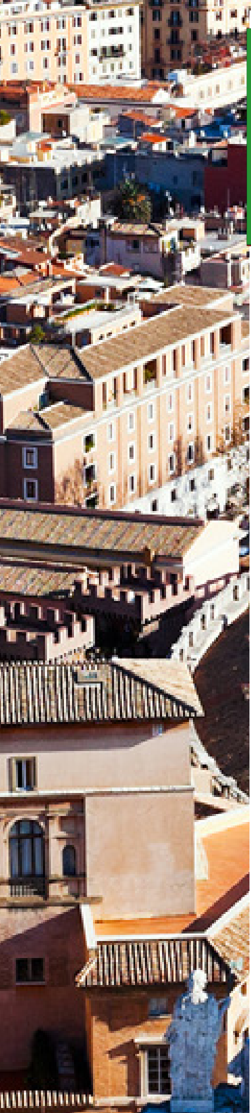
40% share a news story via email or social media each week. Spain is **2nd out of 10** in overall participation



22%
say the mobile is the main way of accessing online news

9%
say the tablet is the main way of accessing online news

* Google News was not included in our brand list for Spain in 2014 – unlike other countries. In 2013 it was one of the most used news brands in Spain



ITALY

Silvio Berlusconi's Mediaset empire operates Italy's top private TV stations, and the public broadcaster, Rai, has also been subject to political influence. Television remains the main source of news for the bulk of the population. The Italian press is highly regionalised, reflecting the country's history and character. Most newspapers are privately owned, often linked to a political party, or run by a large media group. Print newspaper readership figures are low compared to many European countries.

STATISTICS

Population	61m
Internet	58%
Smartphone	59%
Tablet	30%
Interest in news	73% (4th /10)

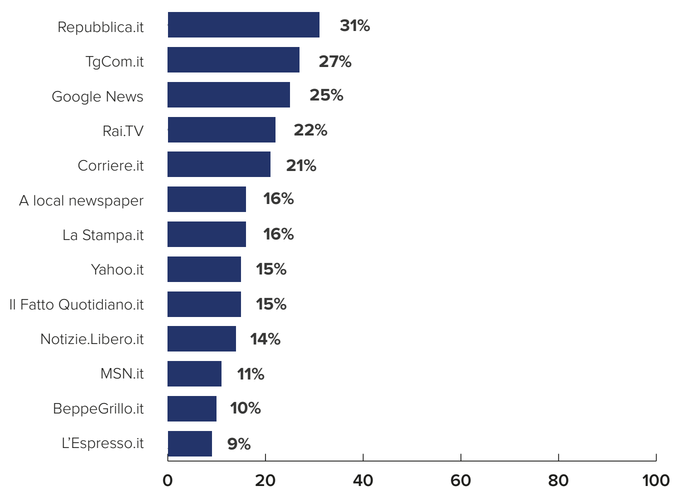
The growing adoption of smartphones and tablets is speeding up the digital transition, which has otherwise lagged some way behind much of the rest of Europe. This represents a big opportunity for both TV and print brands that continue to be the most popular online news destinations, but are struggling to find sustainable business models. Free news subsidised by advertising is the most common model for both online legacy media outlets and pure players, with some exceptions. Repubblica.it and Corriere.it charge a fee for access through mobile devices but remain free on the desktop version.

During 2013 *Il Sole 24 Ore* business newspaper introduced a metered paywall, while *La Stampa* and *Il Fatto Quotidiano* newspapers are respectively experimenting with premium and paid membership models. At the beginning of 2014, Corriere.it introduced native advertising on its homepage in the search for new revenue streams.

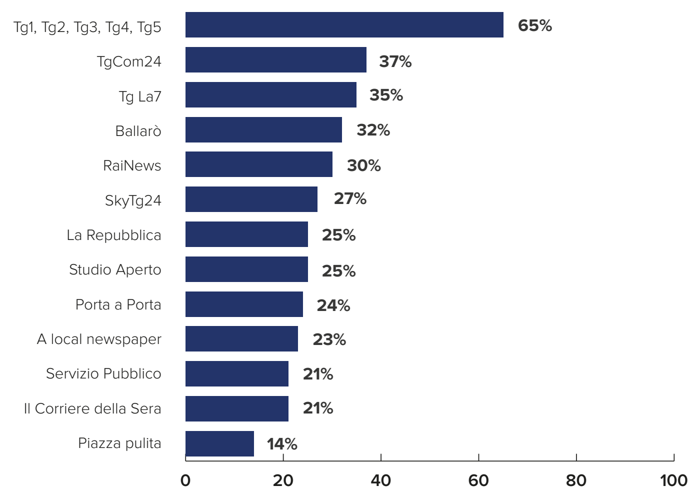
NB

TOP BRANDS – WEEKLY USAGE

ONLINE



OFFLINE



DIGITAL REACH

Newspapers	**67%**
Broadcasters	**46%**
Pure players	**48%**

TOP SOCIAL NETWORKS*

Facebook	**57%**
YouTube	**23%**
WhatsApp	**13%**
Google+	**11%**
Twitter	**10%**

* used weekly for news

Social media are widely used by younger generations and people who sympathise with new political parties (like Beppe Grillo's Movimento 5 Stelle). More and more journalists and professionals are using Twitter, but wider adoption remains low. Use of WhatsApp has boomed in 2014 while Google+ has a growing member base because of its strong integration with other Google services – but only a minority use it regularly.[5]

35% get news on at least two digital devices

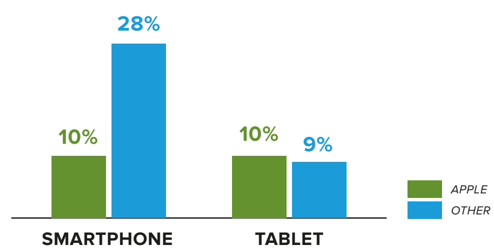
9% use three or more digital devices

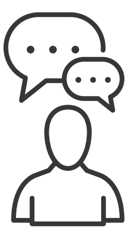
TYPES OF DIGITAL PAYMENT

58% one off payments
35% digital subscription
13% bundled digital/ print subscription

13% pay for online news last year (7th /10)

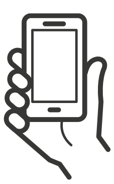
APPLE DEVICES VS THE REST (NEWS USAGE)





DIGITAL PARTICIPATION

44% share a news story via email or social media each week. Italy is **3rd out of 10** in overall participation



19% say the mobile is the main way of accessing online news

8% say the tablet is the main way of accessing online news

[5] See data from Politecnico University: http://www.ipresslive.it/comunicates/1716/internet-media-quasi-2-miliardi-di-grazie-a-mobile-video-e-social-osservatori-ict-polimi.

URBAN BRAZIL

South America's biggest media market is home to thousands of radio stations and hundreds of TV channels. Brazilians are among the world's top users of blogs and social networks and use of online is growing fast, attracting foreign outlets such as BuzzFeed, the Spanish newspaper *El País* and the Huffington Post, which launched their Portuguese versions between 2012 and 2013.

STATISTICS

Population	193m
Internet*	46%
Smartphone	58%
Tablet	40%
Interest in news	87% (1st /10)

* Our survey only took in the urban areas of Brazil and results must be viewed in this light.

TV is by far the most popular medium in Brazil, despite declining viewing figures with the growth of cable TV and internet viewing. Leading provider Globo reached 70% of the audience in the 1980s, but now this figure is nearer 50%. Print circulation is slightly up over the last five years, reflecting the rise of low-cost newspapers, some of them in 'British tabloid style'.

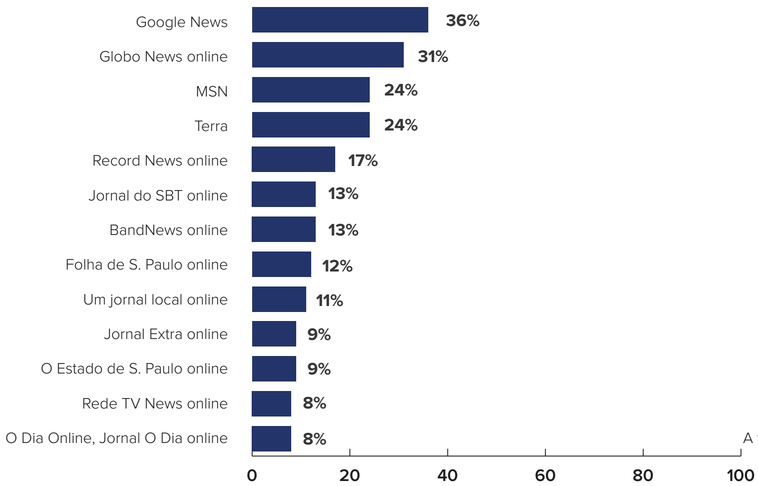
On the internet, there is intense rivalry between Google and traditional providers. In 2011, most popular newspapers in Brazil decided to withdraw their content from Google News, after the giant internet company refused to pay for content. The three big national newspapers – *Folha de S. Paulo*, *O Globo*, and *O Estado de S. Paulo* – have invested in various strategies for paid content. *Folha* has operated a paywall since 2012 and 35% of its subscriptions are now digital.

Both *O Globo* and the *O Estado de S. Paulo* recently created new products designed for tablets and mobiles (a digital 'evening edition').

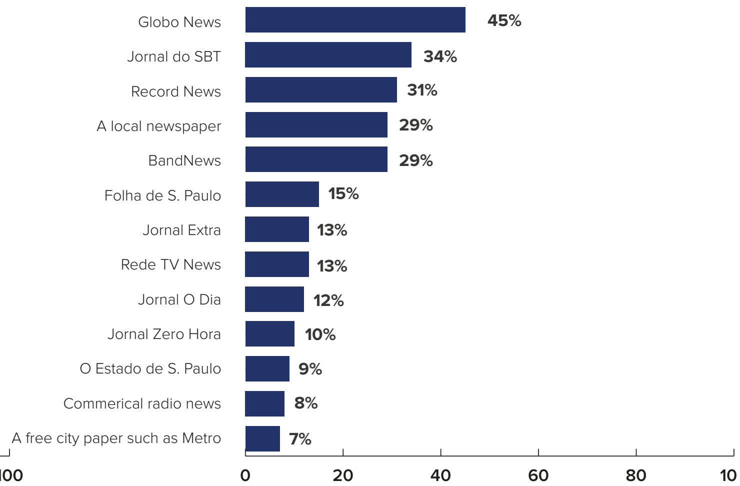
FM

TOP BRANDS – WEEKLY USAGE

ONLINE



OFFLINE



DIGITAL REACH

Newspapers	**49%**
Broadcasters	**52%**
Pure players	**57%**

TOP SOCIAL NETWORKS*

Facebook	**67%**
YouTube	**33%**
Google+	**14%**
Twitter	**13%**
Instagram	**4%**
Orkut	**3%**

* used weekly for news

After the early success (and rapid decline) of Google's social network Orkut, Brazilians have transferred their allegiance to Facebook, which now has around 80 million users. YouTube also performs strongly. One hypothesis about Brazil's love of social networks relates to the early adoption of online interaction tools – such as a chat system developed by internet provider UOL in the 1990s.

41% get news on at least two digital devices

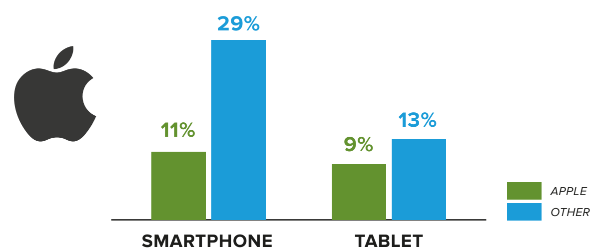
17% use three or more digital devices

TYPES OF DIGITAL PAYMENT

36% one off payments
31% digital subscription
15% bundled digital/ print subscription

22% pay for online news last year (1st /10)

APPLE DEVICES VS THE REST (NEWS USAGE)



DIGITAL PARTICIPATION

54% share a news story via email or social media each week. Brazil is **1st out of 10** in overall participation

18% say the mobile is the main way of accessing online news

8% say the tablet is the main way of accessing online news

JAPAN

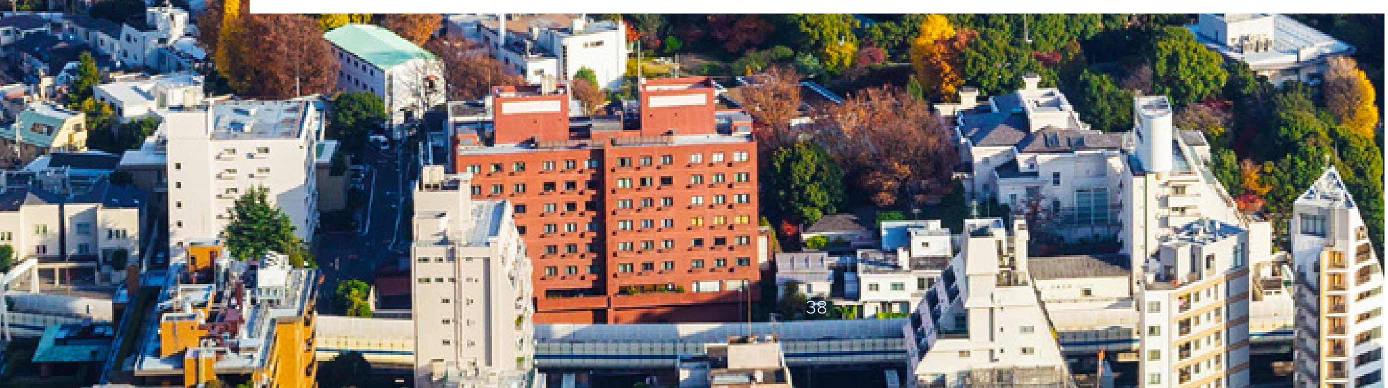
Japan has five national terrestrial TV networks, including publicly funded NHK, which also runs national radio networks. National newspapers sell in millions, circulations boosted by morning and evening editions. Japan was amongst the first to offer internet access via mobile (feature) phones, using walled-garden services like iMode – but these are now being replaced by smartphones. A Japanese feature of digital terrestrial broadcasting, '1seg' (One segment), has popularised watching of TV on the move via mobile phones and car navigation screens.

STATISTICS

Population	127m
Internet	80%
Smartphone	37%
Tablet	18%
Interest in news	65% (8th /10)

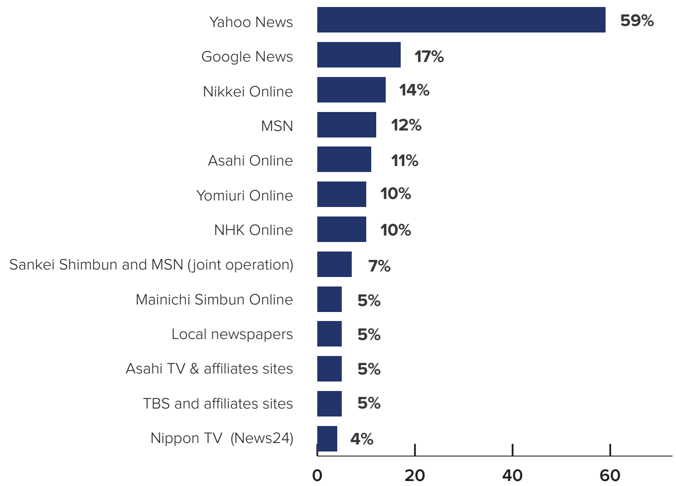
Yahoo News benefits from being part of a portfolio of popular services such as search, email, and auctions – as well as sports, weather, and music. Its biggest shareholder is not Yahoo USA but dynamic Japanese telecommunications provider SoftBank. In contrast, mainstream newspapers were slow to develop online, only launching fully fledged websites and paid services from 2010. The *Nikkei* business daily is the most successful example with over 300,000 premium subscribers. Left-leaning *Asahi Shimbun* launched a paywall in 2011 and conservative *Yomiuri Shimbun* also sells premium services to paper-based readers. Public service broadcaster NHK has been restricted in developing internet news services but does put its radio and TV output online. Commercial TV companies are also restricted as they are regionally licensed under current laws.

IM

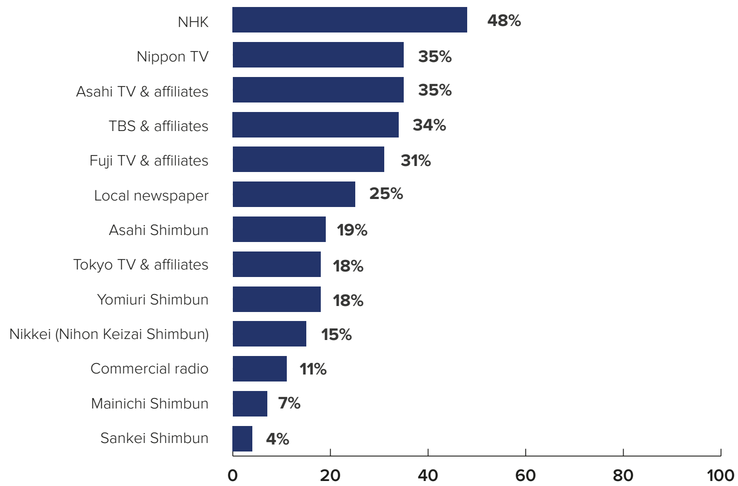


TOP BRANDS – WEEKLY USAGE

ONLINE



OFFLINE



DIGITAL REACH

Newspapers	**31%**
Broadcasters	**18%**
Pure players	**66%**

CROSS PLATFORM REACH

Newspapers	**75%**
Broadcasters	**76%**

TRADITIONAL (OFFLINE) REACH

Newspapers	**69%**
Broadcasters	**73%**

TOP SOCIAL NETWORKS*

YouTube	**15%**
Facebook	**12%**
Twitter	**11%**
Google+	**5%**
Mixi	**5%**
Line	**5%**

* used weekly for news

Japanese commercial TV broadcasters have used YouTube to distribute individual news items to get round their licensing constraints. Twitter became popular after the 2011 earthquake and the Fukushima accident as a reaction to perceived government control of information via traditional media. Mixi pioneered the social networking market in Japan while Line, co-developed between Japan and Korea, is popular on smartphones with the young.

31%
get news on at least two digital devices

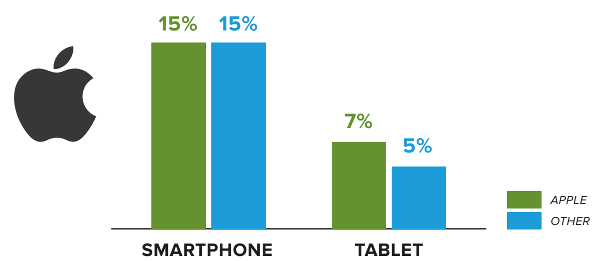
7%
use three or more digital devices

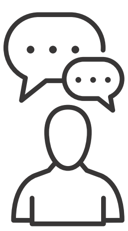
TYPES OF DIGITAL PAYMENT

45% one off payments
43% digital subscription
18% bundled digital/ print subscription

8%
pay for online news last year (7th /10)

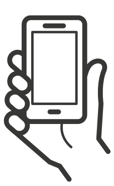
APPLE DEVICES VS THE REST (NEWS USAGE)





DIGITAL PARTICIPATION

10% share a news story via email or social media each week. Japan is **10th out of 10** in overall participation



15%
say the mobile is the main way of accessing online news

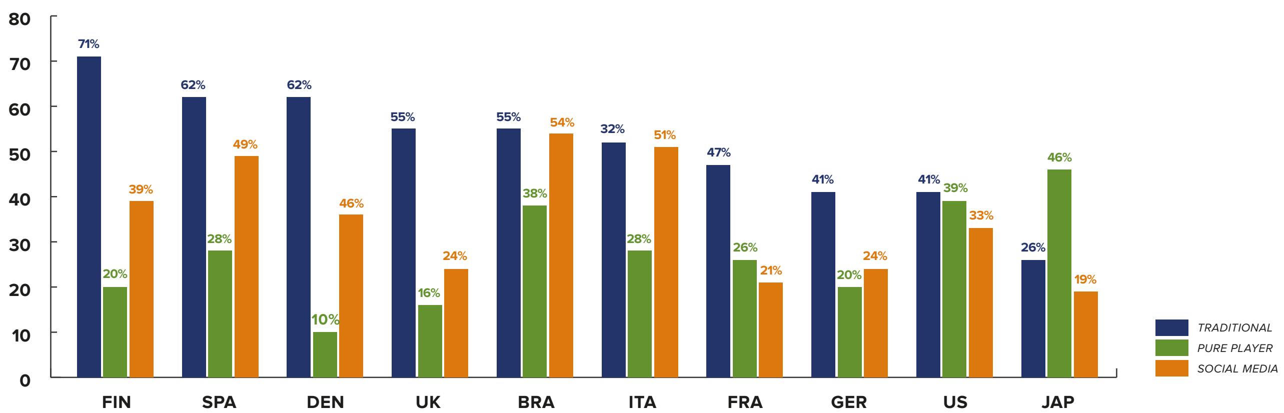
3%
say the tablet is the main way of accessing online news

COMPARATIVE BRAND DATA ANALYSIS

In this section we draw on country data on brand performance along with questions asked elsewhere in the survey about the types of news sources accessed online and offline. This includes a typology of different online sources whether they are *traditional* newspaper providers such as the *New York Times*, or broadcaster websites from e.g. NHK or the BBC, *pure players* and *aggregators* like Yahoo and Huffington Post and Google News, or *social media* sources like YouTube and Facebook

In the figure we have used these classifications to show the level of disruption suffered by traditional news organisations from pure players and social media. We can see that in some countries like Finland, Denmark, and the United Kingdom traditional brands still dominate online news; pure players and social media have made comparatively few inroads. By contrast, in the United States pure players have pretty much caught up with traditional news providers and the same is true of social media sources in urban Brazil. Japan is a special case. The market dominance of Yahoo means that in total pure players outstrip reported online usage by all traditional broadcast and media outlets.

DISRUPTION TO TRADITIONAL MEDIA COMPANIES BY COUNTRY



Q3. Which, if any, of the following have you used in the last week as a source of news?

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, US=2197, Urban Brazil=1015, Japan=1973

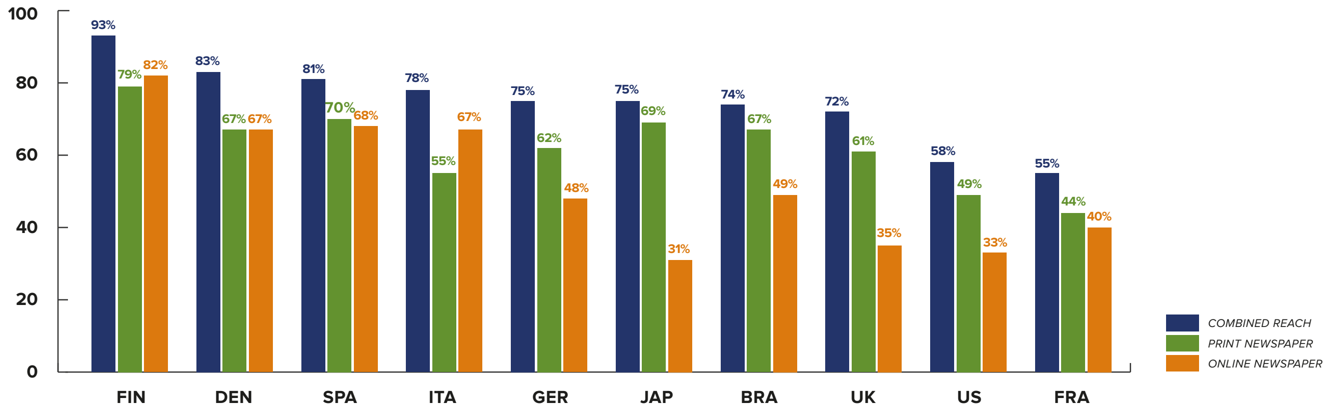
/// NEWSPAPERS AROUND THE WORLD

Within the media sector and more generally there has been most concern and discussion about the future of newspapers and the wider democratic implications as business models have been turned upside down by the move to digital. This is because newspaper groups employ the majority of journalists and have tended to conduct more hard-hitting investigations into the rich and powerful than broadcasters or pure players.

However, with the exception of France and USA, newspapers still *reach three-quarters* of all those interested in news – through a combination of their print and online versions. Finland has 93% combined reach, with very high levels of overlap (i.e. people are using both rather than substituting online for print) and Denmark is the same – partly driven by bundled print and online subscriptions. In the US we have seen falling print sales and much more substitution by online.

Despite the economic pressures, in most countries we can see that the overall reach (and influence) of newspaper groups across online and print remains substantial.

CROSS-PLATFORM, PRINT-ONLY AND ONLINE NEWSPAPER REACH BY COUNTRY



Q5. Which, if any, of the following have you used to access news in the last week?
Base: All markets 2014 – UK: 2082; Germany: 2063; Spain: 2017; Italy: 2010; France: 1946; Denmark: 2036; Finland: 1520; USA: 2197; Urban Brazil: 1015; Japan: 1973

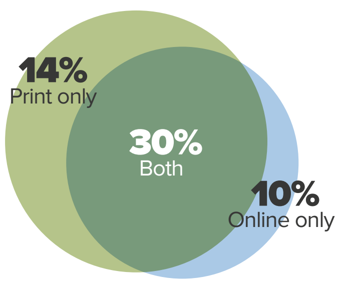
In every country apart from Finland and Italy, print still provides more readers than online and each country has a very different make-up. We next show overlaps in Venn diagram form. These charts have been achieved by tagging offline and online sources in our country lists and measuring overlaps in reported weekly usage of newspaper brands.

Finland and Denmark have successfully managed to transition most of their print readers to digital. In France and the US, not only is the size of the online bubble much smaller – illustrating greater disruption – but many traditional readers have not transitioned to the digital versions of the newspaper and may never do so.

OVERLAPS IN NEWSPAPER USAGE BETWEEN PRINT AND ONLINE – SELECTED COUNTRIES

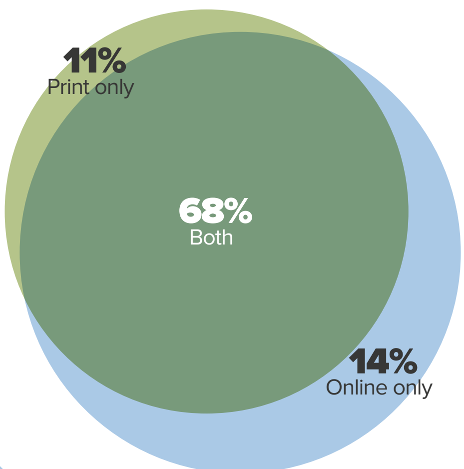
FRANCE

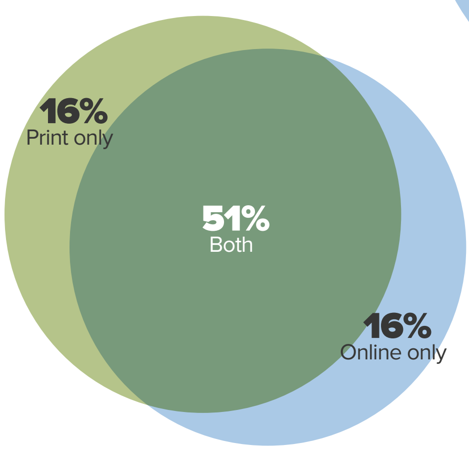
Combined	**55%**
Print	**44%**
Online	**40%**



FINLAND

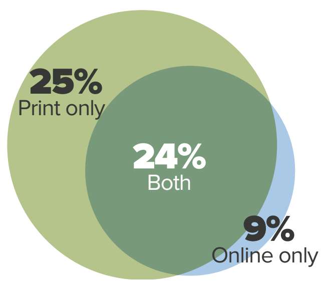
Combined	**93%**
Print	**79%**
Online	**82%**





DENMARK

Combined	**83%**
Print	**67%**
Online	**67%**



US

Combined	**58%**
Print	**49%**
Online	**33%**

/// MANY MORE SOURCES OF NEWS BUT CONSUMERS STICK TO A FEW TRUSTED BRANDS

The growth of digital media and the expansion of choice via cable and satellite television has provided access to more and more sources of news than ever before – most of them free. These include national sources but also international brands such as Al-Jazeera, the *International New York Times*, and specialist blogs and websites that provide information related to work and entertainment.

Against this background, it is perhaps surprising that our data suggest most people continue to access a relatively small number of trusted sources.

NUMBER OF SOURCES – TRADITIONAL AND ONLINE

	UK	GER	SPA	ITA	FRA	DEN	FIN	US	BRA	JAP
TRADITIONAL (TV, RADIO AND PRINT)	2.87	**4.33**	4.12	**4.35**	3.69	**4.38**	3.65	3.23	3.22	3.45
ONLINE	**2.13**	2.74	2.99	3.06	2.70	2.96	**3.72**	2.81	2.92	**2.30**
BOTH	4.33	5.56	5.67	**5.82**	5.02	**5.77**	**5.80**	4.98	5.23	4.83

Q5. Which, if any, of the following have you used to access news in the last week?
Base: All markets 2014 – UK: 2082; Germany: 2063; Spain: 2017; Italy: 2010; France: 1946; Denmark: 2036; Finland: 1520; USA: 2197; Urban Brazil: 1015; Japan: 1973

On average news consumers access between four and five different news sources per week across television, radio, print, and online media. In practice the number of sources is likely to be fewer because this method double-counts news brands that are consumed offline and online. On the other hand our methodology is based on counting a list of around 40 sources in each country so will undercount the long tail of smaller news sources.

In Germany, Italy, and Denmark the number of traditional sources accessed is higher but this may partly be because television and radio news audiences are split across different public service and commercial brands. In the UK and Brazil there is more concentration with the BBC and Globo operating across multiple platforms.

In some ways the online figures are more intriguing. Although the number of sources available is almost infinite, the average user tends to access fewer than three sources each week, with the British and Japanese using just over two. In each of these markets there is one very large provider (BBC and Yahoo respectively), which in each case has a market share of 50% or more of online users in a given week. Elsewhere, as can be seen in the country page charts above, there is a wider split and a greater variety of brands is consumed.

NEWS ACCESS AND CONSUMPTION

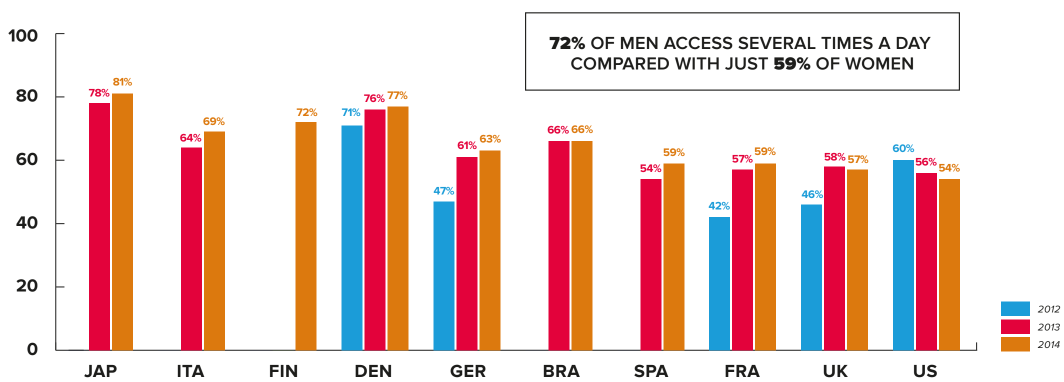
In this section we lay out the overall shape of news consumption, frequency of access and interest in the news and also explain in more detail the segmentation we have used to drive our insights. We explore interest in different types of news, including a detailed comparison of political news consumption in five countries.

/// 2.1 FREQUENCY OF ACCESS AND INTEREST IN NEWS

Our survey of online users suggests that most of us are accessing the news more frequently than ever before. In the five countries we have been tracking since 2012 (UK, US, France, Germany, and Denmark), the number accessing news several times a day has risen from an average of 53% to 62%, with the biggest uplift between 2012 and 2013.

Across all our countries, 72% of men access several times a day, compared with just 59% of women. The Japanese access news most frequently, with 8 in 10 (81%) accessing news several times a day compared with only just over half of our American sample (54%).

% ACCESSING NEWS SEVERAL TIMES A DAY BY COUNTRY

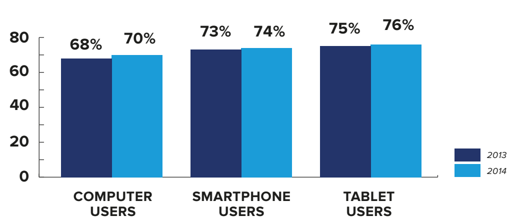


Q1b. Typically, how often do you access news. Responses shown for 'several times a day'

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, USA=2197, Urban Brazil=1015, Japan=1973

These changes seem to be related to the growth of new devices – such as mobiles and tablets – which are extending the range of access points. The more devices we have, it seems, the more frequently we consume.

% ACCESSING NEWS SEVERAL TIMES A DAY BY DEVICE (GLOBAL)



DEVICE	SEVERAL TIMES PER DAY
1 DIGITAL DEVICE	62%
2 DIGITAL DEVICES	74%
3 DIGITAL DEVICES	**81%**
4 DIGITAL DEVICES	**87%**

Q1b. Typically, how often do you access news. Responses shown for 'several times a day'

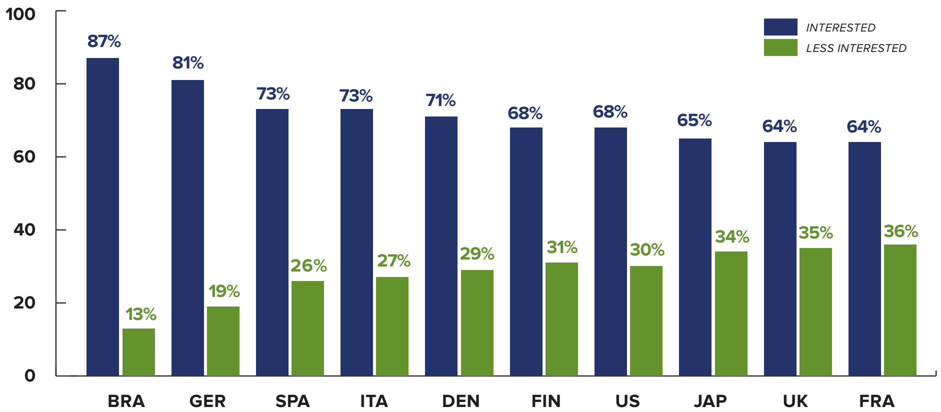
Base: All markets 2014: 18837, 2013: 11004

Interest in news

Frequency of access doesn't necessarily map to interest. The Japanese are most assiduous in checking the news but their declared interest is on a par with the US, UK, and France. The Germans and Spanish are amongst the most interested but check in less frequently than the Finns and the Danes.

Universally men say they are more interested in news than women and interest rises with age

INTEREST IN NEWS BY COUNTRY



Q1c. How interested, if at all, would you say you are in news?

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, USA=2197, Urban Brazil=1015, Japan=1973

Chart shows net: extremely/very interested and net somewhat/not very interested

INTEREST IN NEWS INCREASES WITH AGE (ALL COUNTRIES)

	MALE	FEMALE	18–24	25–34	35–44	45–54	55+
INTERESTED IN NEWS	77%	65%	61%	65%	69%	72%	79%

Q1c. How interested, if at all, would you say you are in news?

Base: All markets 2014: 18837

Main platform for news

Across our countries, television news remains the main way of getting the news, a combination of access to network TV bulletins and 24-hour TV news channels. Online – which includes access by computer, mobile, and tablet via website app or digipaper – is the second most important way of accessing news.

Overall, we see a low level of importance placed on online news in Germany and France while online sources are strongly valued in the US, Spain, and Brazil as well as Finland. Only in Finland is online considered to have equal importance to television news and interestingly print is also highly valued here. Radio news is most important in France and Germany.

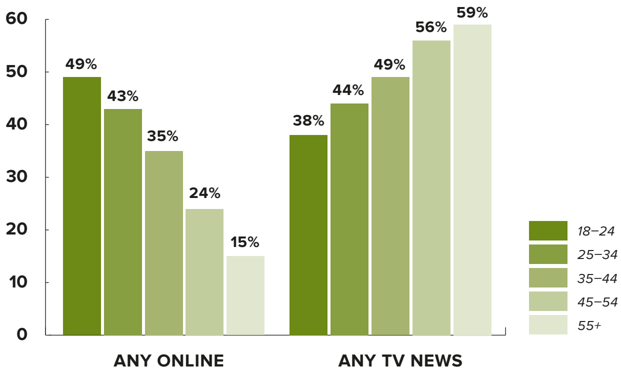
MAIN PLATFORM FOR ACCESSING NEWS BY COUNTRY

	UK	GER	SPA	ITA	FRA	DEN	FIN	US	BRA	JAP
TV	50%	56%	47%	55%	**61%**	54%	36%	50%	56%	54%
RADIO	8%	13%	4%	6%	11%	9%	5%	4%	1%	2%
PRINT	11%	11%	11%	12%	6%	8%	**20%**	6%	4%	**21%**
ONLINE (INC. SOC MEDIA)	30%	**19%**	**35%**	26%	**21%**	28%	**37%**	**35%**	**37%**	22%

Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?

Base: All who have used sources in the past week (16112)

MAIN PLATFORM BY AGE



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?

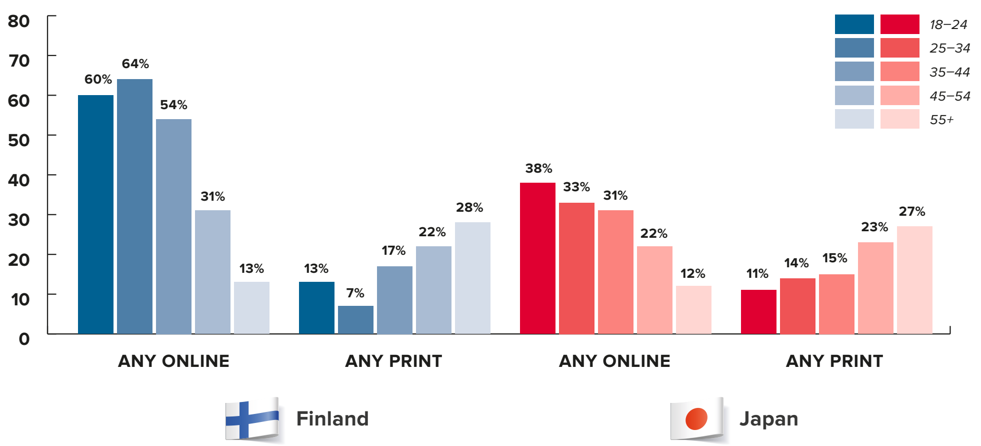
Base: All who have used sources in the past week (16007)

Platform preference: young prefer online

But overall we find that country differences are less significant than generational ones when it comes to platform preference. In every country (apart from Japan) young people prefer online news, while older groups feel more comfortable with the traditional platforms they have grown up with.

Looking at Finland and Japan, the two countries where there is strongest allegiance to print, we can see these habits concentrated in older groups with under 45s overwhelmingly using online as their main way of accessing news.

MAIN NEWS PLATFORM; ONLINE AND PRINT BY AGE



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?

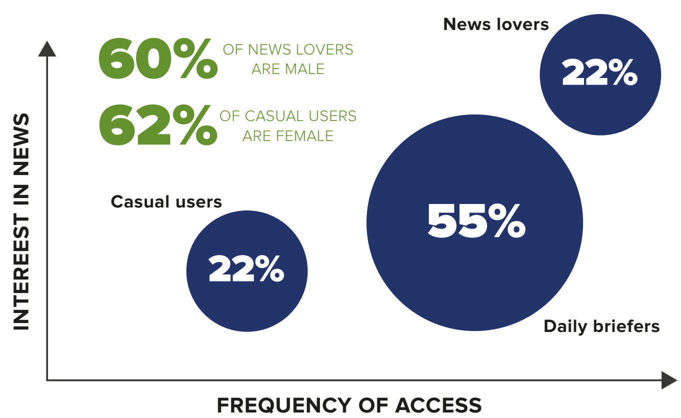
Base: All who have used sources in the past week (16112)

/// 2.2 NEWS SEGMENTATION

As last year we have combined these metrics of frequency and interest to give us a non-overlapping categorisation of the online news universe that we can apply across all of our countries.

- **News Lovers:** These are people who access the news several times a day and say they are extremely interested in the news.
- **Daily Briefers:** These are people who also access the news several times a day but they say they are a bit less interested (very or somewhat) in the news.
- **Casual Users:** These are people who consume less frequently – anything between once a day to once a month – and they also tend to be less interested in the news, with a majority only somewhat interested in news.

TYPES OF NEWS USERS DRAWN FROM INTEREST AND FREQUENCY



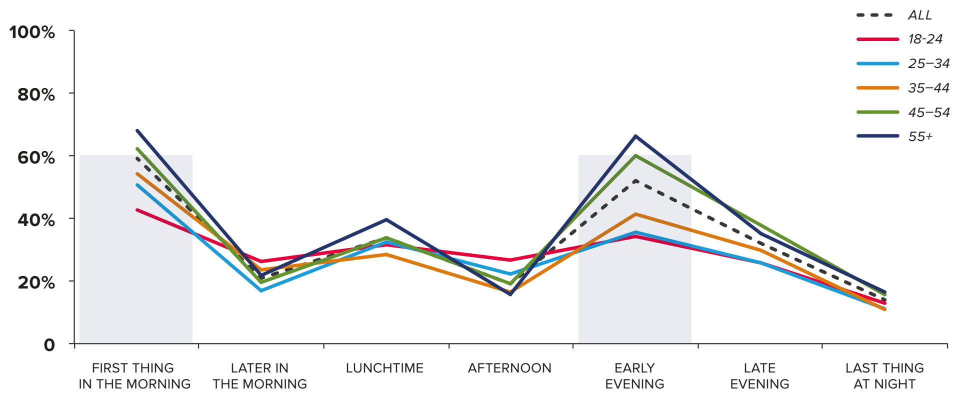
We'll refer back to these groupings throughout this study, but as we shall see, some of these groups play more important roles than others in driving the new interactive news ecosystem. News Lovers consume more, share more, and are twice as likely to pay for online news. The majority of consumers across countries (55%) can be considered Daily Briefers. They tend to be reluctant to pay for online news but the size of this group makes them important for advertisers trying to reach a mass audience. The US has the highest proportion of Casual Users (32%), but also a high proportion of News Lovers (26%). Italy has the highest proportion of News Lovers (29%) while Japan and Finland (67% and 69%) have the highest proportion of Daily Briefers.

/// 2.3 WHEN AND WHERE DO WE ACCESS THE NEWS?

The classic news consumption curve is being transformed by the growth in new mobile devices, which are extending the access points through the day. As the figure shows, younger people tend to access throughout the day whereas for older groups news access coincides with scheduled TV and radio broadcasts in the morning, lunchtime, and early evening.

Interestingly we see a different pattern in Finland. Here the whole population is showing a flatter consumption curve, reflecting the wider take-up of internet and mobile technologies. In Finland, the main TV news shows are also spread throughout the evening, with bulletins at 6pm, 7pm, 8.30pm and 10pm, and the later bulletins capturing the main audiences.

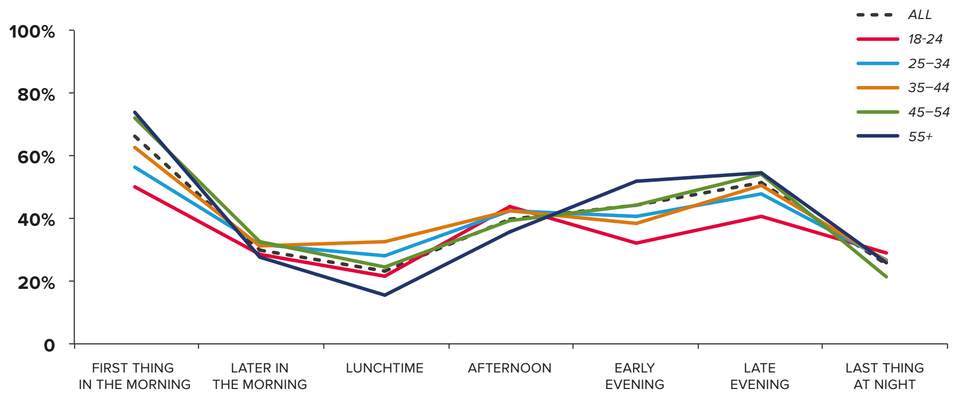
NEWS ACCESS ACROSS THE DAY BY AGE (UK)



Q4b. When do you typically access the news? (Please select all that apply)

Base: UK=2082 – 18–24 (267), 25–34 (235), 35–44 (249), 45–54 (413), 55+ (918)

NEWS ACCESS ACROSS THE DAY BY AGE (FINLAND)



Q4b. When do you typically access the news? (Please select all that apply)

Base: Finland=1520 – 18–24 (111), 25–34 (320), 35–44 (253), 45–54 (311), 55+ (543)

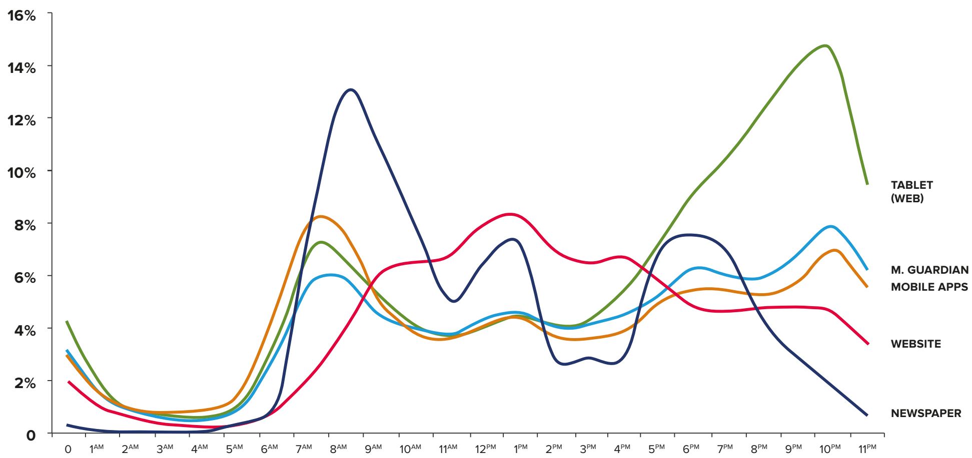
Impact of device

Traditionally internet news sites get most of their traffic during the daytime from work-based computer use. The peak used to be around lunchtime but tails off rapidly in the early evening. But in the next figure, derived from logfiles from the *Guardian* online sites, we can see how smartphones and tablets are extending the work day, creating new internet peaks in the early morning, in the commute, and in the late evening – with the computer filling in gaps in between.

We are grateful to the *Guardian* for allowing us to reproduce this chart showing usage patterns per device – and you can also see the results of their research around the time of day that the printed newspaper is consumed as well.

These insights have led many news organisations (including the *Financial Times*) to rethink shift times – focusing more journalistic effort on the early morning (6–8am)

ACCESS TO THE GUARDIAN ACROSS THE DAY VIA NEWSPAPER AND DIGITAL DEVICES



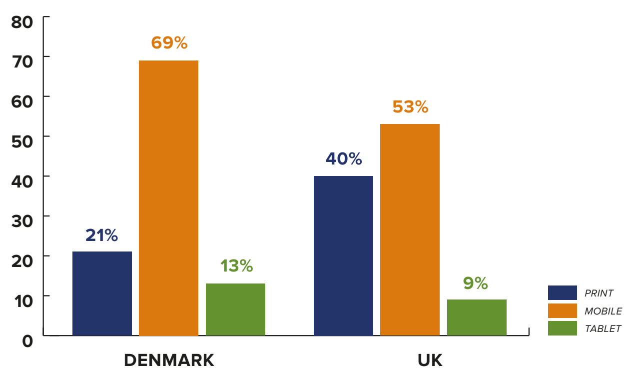
Source: Guardian audience research

The impact of mobile phones and tablets on the daily commute

The proportion of those accessing news via mobile phone when travelling has grown in Denmark and the UK, the two countries where we looked at this in 2013 and 2014. On public transport the mobile phone has extended its lead over printed newspapers and over the tablet. Given the general growth in smartphones in both countries this is not surprising. In the UK we can see that smartphone users are younger than print readers although the wide availability and convenience of free newspapers means the age difference is not as dramatic as one would expect.

On personal transport (cars, bicycles, etc.) the flexibility of radio remains paramount but there has been a significant growth of mobile and tablet use for news in Denmark. A fifth (18%) of Danes travelling by personal transport now use an internet device (mobile, tablet, or laptop computer) to access the news on a given day. Mobile phones are making inroads as a source of news, not least because they can access on-demand news content that can plug into headphones or a car sound system.[6]

NEWS ACCESS ON PUBLIC TRANSPORT (TRAIN, BUS, ETC)



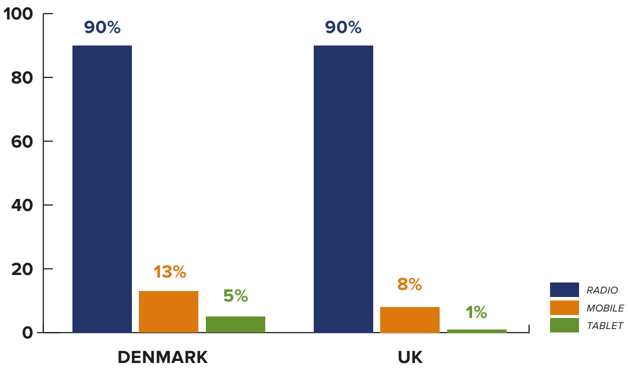
AGE PROFILE MOBILE AND PRINT (UK ONLY)

	UNDER 45S	OVER 45S
MOBILE	71%	29%
PRINT	68%	32%

Q4e. Please mention the key news media you used in these locations yesterday
Base: Accessing news when travelling via public transport UK=137, Denmark =88

[2] The *Financial Times* is one of many publishers experimenting with an audio version for the car.

NEWS ACCESS ON PRIVATE TRANSPORT (CAR, BICYCLE ETC)



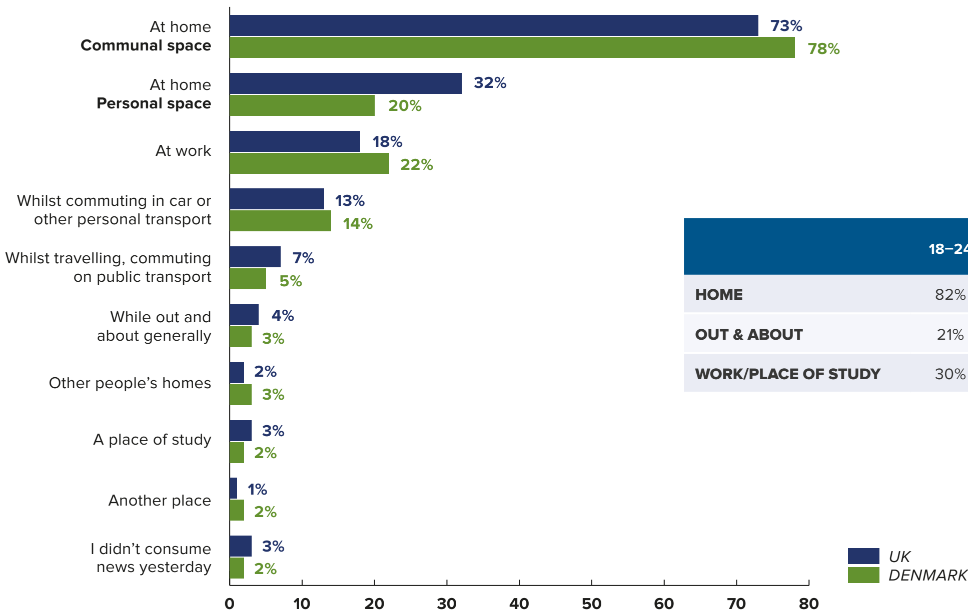
Q4e. Please mention the key news media you used in these locations yesterday
Base: While travelling via private transport UK=266, Denmark=290

New landscape of news access

More widely we see that, in both the UK and Denmark, the majority of news access remains in the home, which helps to explain the morning and evening peaks. Younger groups are generally out and about more and this contributes to their tendency to access more often through the day.

When we look at the specific platforms used in the home to access news, we can see the wide range of choices accessed every day. In communal spaces such as the living room and kitchen, the TV remains by far the most accessed but online devices are an important part of the mix especially for the young. The personal computer and laptop remain most important in personal spaces such as bedroom and studies.

WHERE NEWS IS ACCESSED (UK AND DENMARK)



	18–24	25–34	35–44	45–54	55+
HOME	82%	74%	82%	88%	96%
OUT & ABOUT	21%	22%	26%	27%	15%
WORK/PLACE OF STUDY	30%	35%	30%	26%	5%

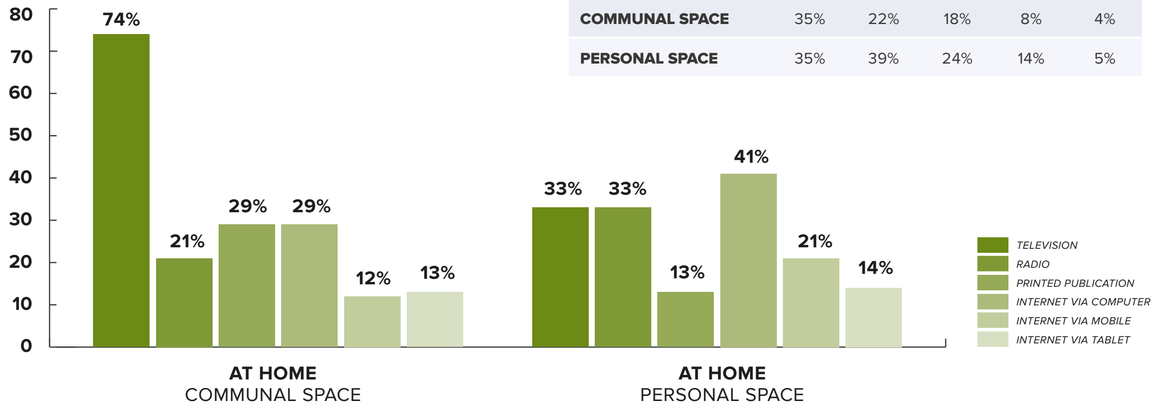
Q4c. Where were you when you looked at/listened to the news yesterday? (List all that are relevant)
Base: UK=2082, Denmark=2036

These aggregate views hide the dramatic impact of generational differences in daily media choices at home in the UK. Even in communal spaces, internet-based access to news (PC, tablet, or mobile) is now neck and neck with TV for the under 45s. By contrast, over 45s are twice as likely to access news via the TV as to use an internet news source. In personal spaces, under 45s are almost three times more likely to access internet-based news than watch TV.

These data show that in these two countries at least traditional media platforms are far from being replaced by digital platforms but there is both extended access and some substitution going on. Young people are significantly less likely to watch TV and radio news than older groups, favouring access from a variety of internet devices. The computer is most important at work, while on the move the mobile phone is the most important form of access. Radio news is still valued by commuters using personal transport such as the car. This is truly a multi-platform news ecosystem where all platforms – including print – continue to play a significant role depending on the time and the context.

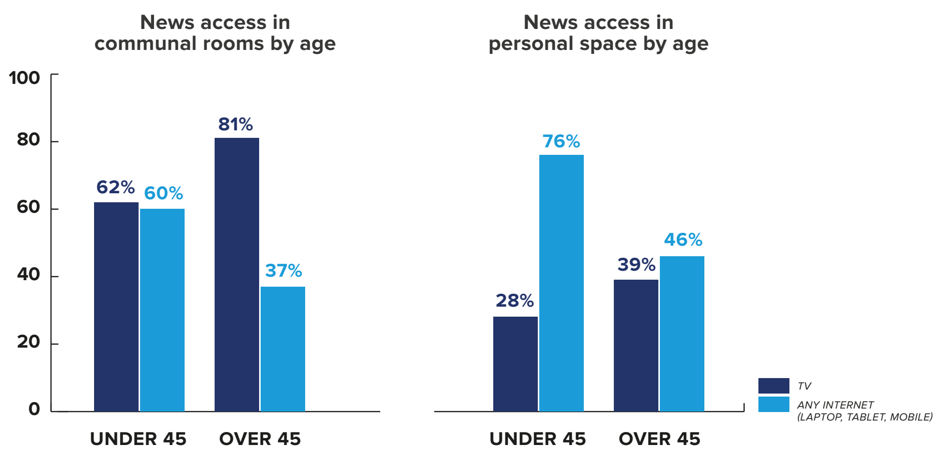
NEWS ACCESS IN THE HOME BY PLATFORM (UK)

	18–24	25–34	35–44	45–54	55+
COMMUNAL SPACE	35%	22%	18%	8%	4%
PERSONAL SPACE	35%	39%	24%	14%	5%



Q4e. Please mention the key news media you used in these locations.
Base: UK – Those who access at home: communal (1574), at home: personal (700)

ACCESS AT HOME BY AGE: TV VS INTERNET (UK)



Q4e. Please mention the key news media you used in these locations.
Base: UK – Those who access at home: communal (1574), at home: personal (700)

/// 2.4 INTEREST IN DIFFERENT TYPES OF NEWS

Like last year we asked all our respondents to select their five most important types of news. Once again we see significant country-based variation.

Regional news is most important in Germany, reflecting the way the media and politics have traditionally been structured. Local news matters more in a vast country like the United States where city newspapers and local TV stations have become a core part of the media diet.

Americans show most interest in economic news along with the Japanese. The British, Finns, and Brazilians show least interest in political news. Italians and Spanish are interested in arts and culture news while our sample from urban Brazil is deeply interested in health and education, as well as science and technology.

Looking at an aggregated view of our entire sample of almost 19,000 people we can see that many news topics are heavily gender specific – and these are universal across countries. Men prefer sports news by a margin of almost three to one compared to women but for celebrity news it is the other way round. Men are more interested in business news; women access more education, health, and local news.

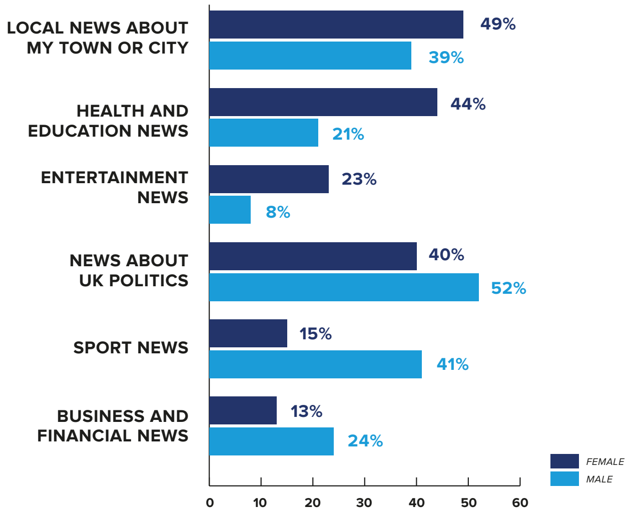
INTEREST IN TYPES OF NEWS BY COUNTRY

	UK	GER	SPA	ITA	FRA	DEN	FIN	US	BRA	JAP
NEWS ABOUT THE COUNTRY	71%	67%	63%	59%	64%	67%	76%	57%	66%	52%
INTERNATIONAL NEWS	49%	64%	45%	49%	52%	63%	55%	39%	41%	43%
LOCAL NEWS ABOUT MY TOWN OR CITY	46%	47%	42%	45%	37%	40%	48%	57%	47%	31%
NEWS ABOUT MY REGION	38%	51%	42%	38%	41%	26%	47%	31%	12%	33%
BUSINESS AND FINANCIAL NEWS	21%	17%	13%	15%	15%	21%	12%	20%	29%	26%
NEWS ABOUT THE ECONOMY	39%	29%	38%	33%	27%	35%	31%	46%	34%	44%
ENTERTAINMENT AND CELEBRITY NEWS	17%	15%	14%	13%	13%	12%	16%	15%	22%	24%
FUN/WEIRD NEWS	15%	14%	18%	21%	22%	18%	14%	16%	15%	28%
HEALTH AND EDUCATION NEWS	28%	30%	37%	38%	31%	29%	27%	28%	57%	30%
ARTS AND CULTURE NEWS	12%	9%	19%	24%	15%	15%	14%	10%	27%	15%
SPORTS NEWS	29%	28%	35%	29%	25%	27%	27%	20%	30%	28%
NEWS ABOUT THE COUNTRY'S POLITICS	37%	51%	40%	54%	45%	59%	30%	46%	37%	52%
SCIENCE AND TECHNOLOGY NEWS	25%	27%	33%	35%	28%	31%	31%	28%	43%	26%

Q2. Which of the following types of news is most important to you? Please choose up to five.

Base: All markets 2014 – UK: 2082; Germany: 2063; Spain: 2017; Italy: 2010; France: 1946; Denmark: 2036; Finland: 1520; USA: 2197; Urban Brazil: 1015; Japan: 1973

GENDER DIFFERENCES ACROSS DIFFERENT TYPES OF NEWS – ALL COUNTRIES



Q2. Which of the following types of news is most important to you? Please choose up to five

Base: All 2014 - 18858

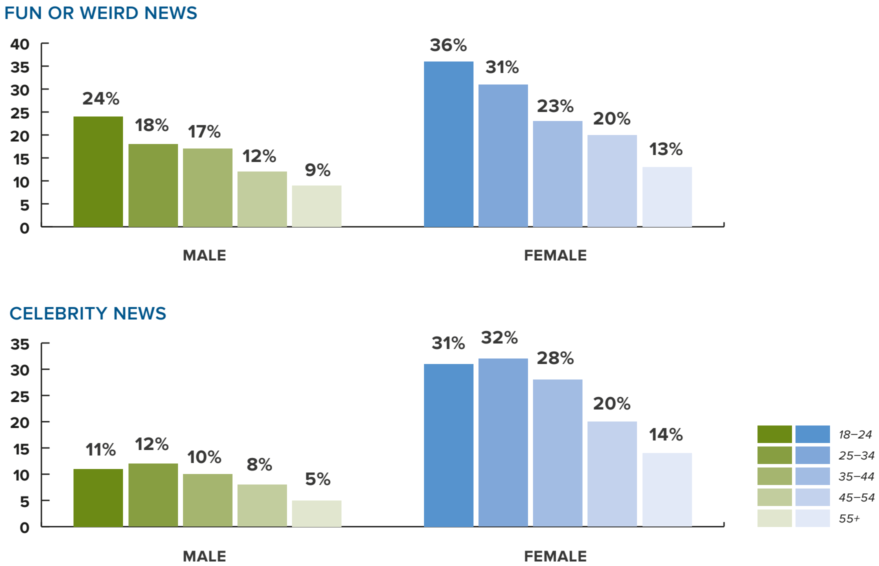
Weird news

This year we introduced a new category of 'fun or weird' news. In many countries there has traditionally been an amusing item at the end of a news bulletin or included prominently within a print newspaper but in the digital age this type of news has blossomed, encouraged by sharing of fun pictures and videos through social media sites.

Unlike entertainment and celebrity news, which is mainly driven by women under 35, fun/weird news is appreciated by both men and women. Around a quarter (24%) of 18–24 males and a third of 18–24 women (36%) said it was one of their five most important types of news.

There is a strong correlation between these groups and socially driven sites like Buzzfeed and Upworthy where such material is often originated or shared. These new sites have pioneered new formats of fun news including lists, animated gifs (fun moving pictures), and games. By contrast, popular newspapers and their websites (in the UK) have mainly continued to satisfy interest for more straightforward entertainment and celebrity news, although they too have been experimenting with new formats.

FUN NEWS AND CELEBRITY NEWS COMPARED BY AGE AND GENDER – ALL COUNTRIES



Q2. Which of the following types of news is most important to you? Please choose up to five. Showing fun/weird and celebrity news

Base: All - 18858

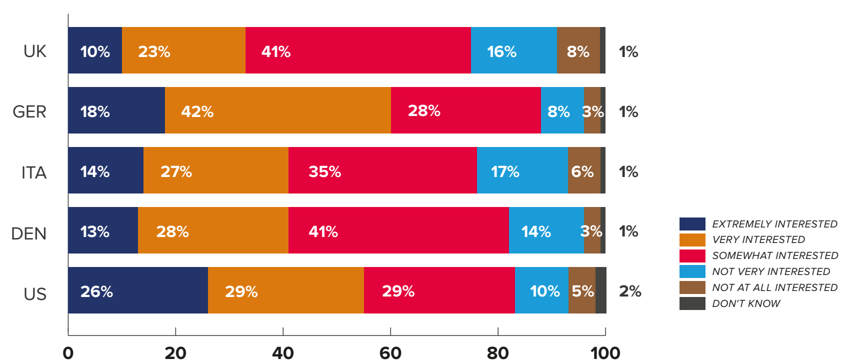
/// 2.5 POLITICAL NEWS AND POLITICAL ENGAGEMENT

Political interest

This year we have been able to ask a number of questions about people's interest in politics in five countries (UK, Germany, Italy, Denmark, and the US), and to cross-check this with their use of different offline and online media as sources for political news. We have also asked whether and how people use online opportunities to engage in politics.

Our interest in exploring these issues stems from the fact that a healthy democracy depends on the citizens' access to a diversity of news media and on the opportunities for participation in public debate and political processes enabled by these media.

LEVELS OF INTEREST IN POLITICS COMPARED



Q2a. How interested would you say you are in politics? Showing net of extremely and very interested

Base: All markets 2014 – UK=2082, Germany=2063, Italy=2010, Denmark=2036, US=2197

Overall, interest in politics turns out to be significantly higher in Germany and the US, where respectively 60% and 55% say that they are either extremely interested or very interested in politics, compared to considerably lower levels of interest in Denmark (41%), Italy (41%), and especially the UK (33%). In all five countries a fairly large group in the middle say that they are 'somewhat interested in politics', while in the UK and Italy almost a quarter of the population have little or no interest in politics.

Across the five countries interest in politics varies considerably by age and gender. In general, women and men are separated by approximately 20 percentage points with respect to self-reported interest in politics (with a somewhat smaller gap in Italy). With respect to age, it is especially the younger age groups (18–24 and 25–34) who are less interested in politics, while the other age groups are not very far from the national average.

Generally speaking, older people in Germany, Denmark, and the US express more interest in politics than younger people. In Italy and the UK, interest is more even across all age groups.

LEVELS OF INTEREST BY AGE AND GENDER

	ALL	MALE	FEMALE	18–24	25–34	35–44	45–54	55+
UK	33%	**44%**	**23%**	31%	26%	29%	28%	42%
GERMANY	60%	**72%**	**49%**	46%	46%	54%	61%	71%
ITALY	41%	**49%**	**34%**	25%	41%	40%	39%	46%
DENMARK	41%	**51%**	**31%**	38%	29%	37%	39%	52%
US	55%	**65%**	**46%**	36%	42%	49%	50%	69%

Q2a. How interested would you say you are in politics? Showing net of extremely and very interested

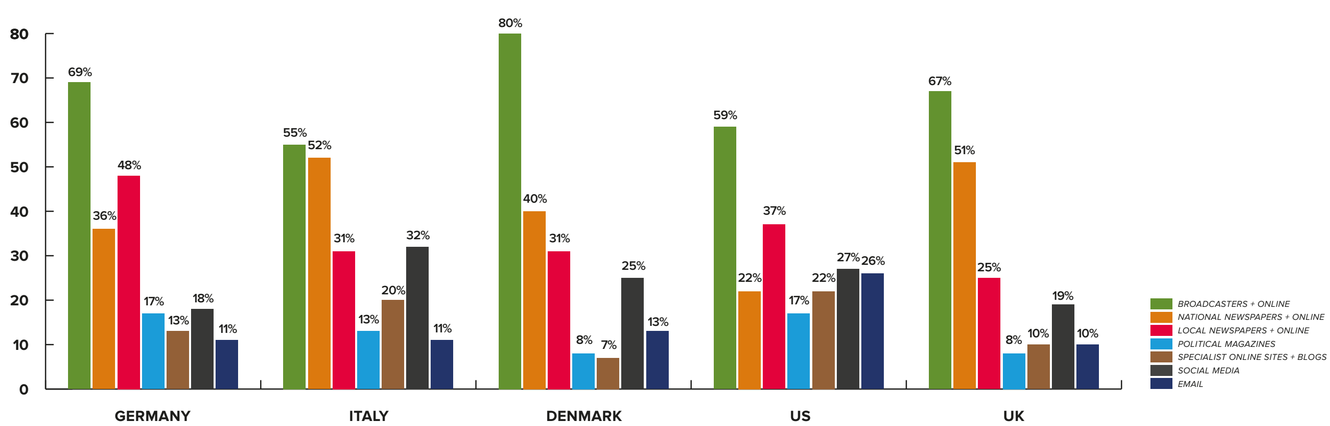
Base: All markets 2014 – UK=2082, Germany=2063, Italy=2010, Denmark=2036, USA=2197

Sources of political news

In most of the countries covered here, two-thirds or more of the population say that they keep up with political and government issues by means of broadcasters' news.

Though broadcast news – through its combined offline and online reach – is consistently the single most important and widely used source of news about politics, the second-most important source of news differs considerably among the five countries. In some countries, newspaper publishers remain in a strong second or third position as a result of the combined attractions of their print and online news platforms. This is the case in the UK, Germany, Italy, and Denmark. In all countries, print use is declining, but newspapers retain considerable reach and significance. In the US the picture is much more diverse. There too, local newspapers reach a significant audience, but national newspapers trail behind social media and email newsletters and alerts, and are as widely used as a source of information about politics and government issues as online specialist sites/political blogs.

MAIN SOURCES OF POLITICAL NEWS BY COUNTRY



Q2b. Which, if any, of the following sources of information do you use to keep up with political and government issues? (Please select all that apply)

Base: All interested in political news – Germany=1999, Italy=1885, Denmark=1977, US=2088, UK=1934

MAIN SOURCES OF POLITICAL NEWS FOR THOSE WITH LOW INTEREST

	BROAD-CASTERS	NATIONAL NEWSPAPERS	LOCAL NEWSPAPERS	SOCIAL MEDIA	FRIENDS RELATIVES
UK	46%	25%	15%	10%	19%
GERMANY	40%	13%	20%	11%	30%
ITALY	51%	35%	21%	26%	30%
DENMARK	65%	18%	19%	17%	29%
US	44%	7%	25%	25%	43%

Q2b. Which, if any, of the following sources of information do you use to keep up with political and government issues? (Please select all that apply)

Base: Those who are not very interested or not interested at all – UK=325, Germany=154, Italy=339, Denmark=295, US=204

When we break down media use by interest in politics, it is clear that news from broadcasters and newspapers is especially important when it comes to people with limited interest in politics. This group (which varies in size from 24% in the UK to 23% in Italy to around 15% in the US and Denmark and just 11% in Germany) also tends to rely more than other groups on information from friends, relatives, and colleagues, while social media do not stand out as more significant than is the case for other groups.

In comparison, those who express a high interest in politics are generally heavy consumers of a wide range of media including the mainstream news providers as well as various niche and specialist news media like politically focused magazines (print and online) and online specialist sites.

Across four of the five countries, broadcasters' news is the most important source of political information for the youngest age groups (18–24). The US is the only exception to this. There, conversation with friends, relatives, and colleagues lead neck-to-neck with social media amongst the youngest citizens, with broadcasters in third place. Young people in the other four countries also frequently report interpersonal communication offline and online as an important source of information about politics.

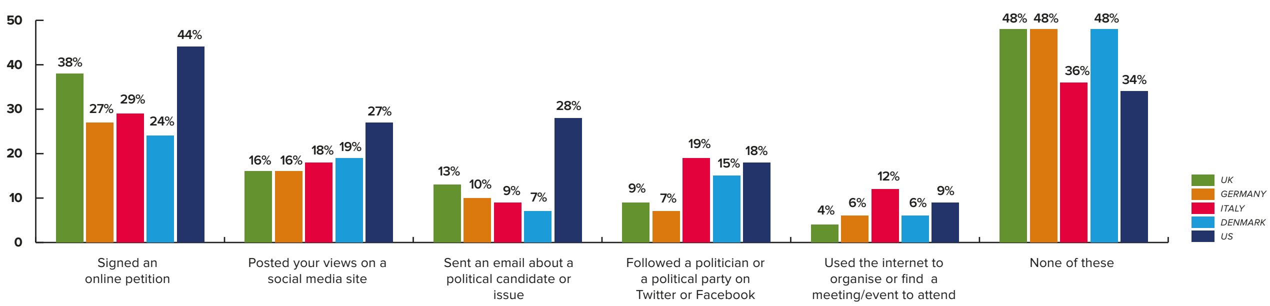
Online political engagement

As is often highlighted, the internet offers not only sources of information, but also opportunities for a wide variety of forms of political engagement, ranging from very low-cost forms of engagement like signing a petition or expressing one's views on a social media site to more demanding forms of engagement like joining a political campaign or organising a political event.

Across the countries covered here, between half (UK, Germany, and Denmark) and two-thirds (Italy and the US) of online news users report that they have in the last year used the internet to get more involved in politics.

Looking across the countries, there are some significant similarities and differences. The figure provides an overview of a selection of the most important kinds of activities we asked about (five out of nine kinds of activity).

ONLINE INVOLVEMENT WITH POLITICS BY COUNTRY



Q2c. In which, if any, of the following ways have you used the internet in the last year to get more involved in politics or express a political opinion? Nine options given, plus 'don't know' and 'none of these'.

Base: All interested in political news – Germany=1999, Italy=1885, Denmark=1977, US=2088, UK=1934

In all the countries, low-cost forms of engagement like signing an online petition or expressing one's views via 'Web 2.0' (a social media site) or 'Web 1.0' (email) tools are the most common phenomena. A more limited number of people report actively following politicians or political parties on social media sites, and even fewer have used the internet to organise political events or find political meetings to attend. As one would expect, people who report a high interest in politics are significantly more likely to use the internet to get involved.

Across most of the forms of online political engagement in our survey, Italy and especially the United States have the highest number of people using the internet to get more involved in politics or to express their opinion. This is broadly in line with our data from last year where the US, with a longer tradition of internet politics and more substantial investments in online mobilisation from political parties and campaigns, stood out alongside the Mediterranean countries who are going through a period of political upheaval.

See section 4.5 for more on Participation and Engagement Online, p. 73.

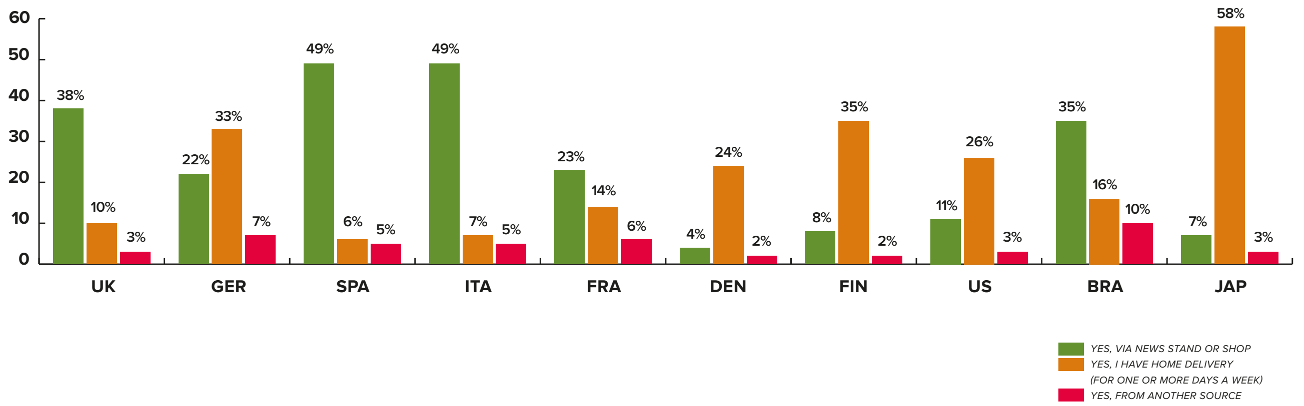
PAYING FOR NEWS

/// 3.1 NEWSPAPER PURCHASE ACROSS COUNTRIES

In addition to tracking newspaper consumption by brand and country (section 1) our survey also benchmarks the number who say they have bought a newspaper in a given week. Newspaper purchase does not equate to readership, particularly with the growing popularity of free papers and the increased bundling of online and print. In addition it should be noted that the figures in our online survey will not match the accuracy of face-to-face surveys or audited circulation figures in this regard. Nevertheless the comparison between years and across countries is one more important indicator of changing habits.

The headline figure around weekly newspaper purchase across all of our ten countries is pretty much unchanged at 49% (compared to 50% in 2013) reinforcing the view that print has perhaps a longer shelf life than was thought a few years ago – even for online readers. But we can also see from the next figure that the very different ways in which newspapers are bought may influence their ability to manage the digital transition. Japan, Finland, Denmark, and Germany have a long tradition of home delivery (and therefore subscription), whereas in the UK, Spain, Italy, and Brazil the majority of sales take place at a newsstand or shop. This makes newspapers in these counties more prone to dramatic headlines and sometimes more sensational news coverage – but also more vulnerable to economic disruption.

NEWSPAPER PURCHASE BY TYPE – (AD HOC VS ONGOING COMMITMENT)



2013	UK	GER	SPA	ITA	FRA	DEN	US	BRA	JAP
NEWS STAND/SHOP	42%	22%	48%	51%	25%	5%	12%	34%	9%
HOME DELIVERY	9%	33%	4%	5%	10%	24%	25%	13%	57%

Q6. Have you bought (paid for) a printed newspaper in the last week? (Please tick all that apply)

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, US=2197, Urban Brazil=1015, Japan=1973

/// 3.2 PAYING FOR DIGITAL NEWS

Over the last year there has been intense activity in the news industry in devising more ways to pay for news. Metered or hard paywalls have become standard in many countries including the United States where a recent survey showed over half of all newspapers operating them. In Germany, leading publisher Axel Springer recruited over 150,000 subscribers for its premium service Bild Plus in the six months since its launch in June 2013. Over one third have also signed up for a service of digital goals from the Bundesliga via *Bild*. In the UK, the popular *Sun* newspaper has followed a similar model and attracted over 100,000 new digital subscribers.

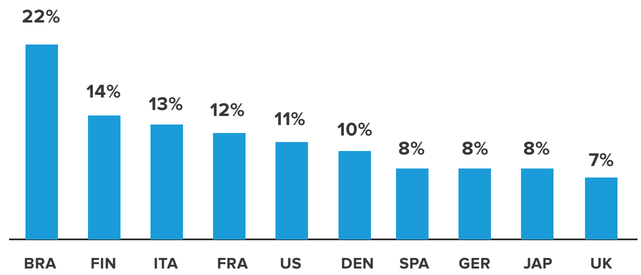
But after a sharp upturn in 2012–13 – when a large number of paywalls were introduced – our data show very little change in the absolute number of people paying for digital news over the past year. In most countries the number paying for any news is hovering around 10% of online users and in some cases less than that.

Even so, our findings are consistent with the recent Pew research report in the United States which suggests that industry activity does not necessarily mean more individuals are paying for news but rather that 'more revenue is being squeezed out of a smaller, or at least flat, number of paying consumers'.[7]

In support of this conclusion, our data have picked up significant changes in types of payment being made. The proportion of those paying for news who have an online news subscription has grown from to 43% to 59% – compared with a one-off payment like a day pass or app download.

In the next figure we can see that digital subscriptions in the UK have risen from 29% to 47%, as a proportion of all of those who have paid – most likely because of the *Sun* and *Daily Telegraph* paywalls. In Spain, the number of one-off purchases has grown – individual copies of epapers are popular here – while in Denmark, Finland, and the United States we see the highest prevalence of bundled (print and digital) subscriptions.

PERCENTAGE PAYING FOR ANY ONLINE NEWS IN LAST YEAR



Q7. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year (this could be an ongoing subscription or one off payment for an article or app)?

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, US=2197, Japan=1973. NB These figures are not directly comparable with last year as we changed the question to a simpler yes/no – and took out the previous time-based options. We also changed 'digital news' to 'online news' for reasons of clarity.

Of those subscribing for online news
(all countries)

61% are male

35% are aged 55+

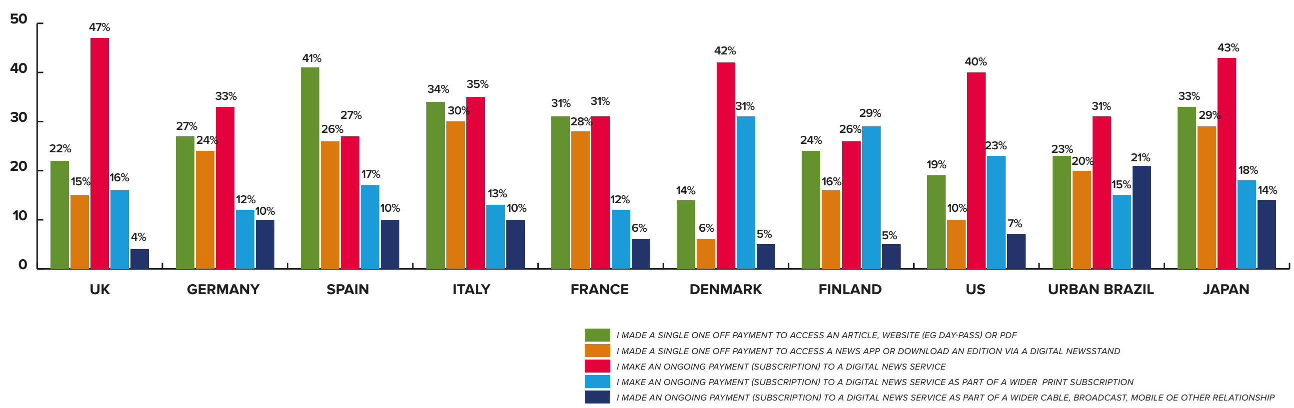
52% have a Masters/Doctoral or Bachelors degree

89% say they are very or extremely interested in news

43% use a tablet for news

47% Online subscription payment in the UK, 2014 (29% in 2013)

PROPORTION OF NEWS PAYMENTS: SUBSCRIPTION VS ONE OFF PAYMENT

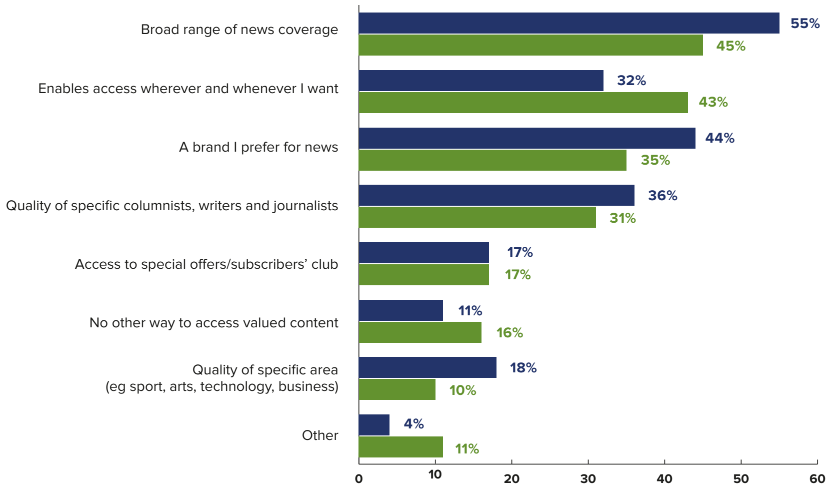


Q7ai. You said you have accessed paid for ONLINE news content in the last year. Which, if any, of the following types of payment have you used in the last year? (Please tick all that apply)

Base: All who have paid to access online news in the past year – UK=139, Germany=173, US=238, Japan=153, Urban Brazil=233, Italy=267, Denmark=206, Spain=173, Finland=220

[7] Pew, *State of the News Media Report* (2014): http://www.journalism.org/packages/state-of-the-news-media-2014.

REASONS FOR SIGNING UP AND REASONS FOR STAYING – UK



67% signed up for broad range/quality; **80%** stay for it

Of those subscribing in the UK

37% pay for The Times online

23% pay for the Telegraph online (either digital only or part of a bundle)

20% pay for the Sun which has introduced a hard paywall with premiership goals as part of its offer

Q7b/c. You said you have a subscription with at least one news provider, what were the three most important factors in taking/keeping an online news subscription in the first place (choose up to three)?

Base: All who have paid to access online news in the past year - UK=139, all who subscribe=93

Of those who are paying for news, the majority are well educated and from higher income groups.

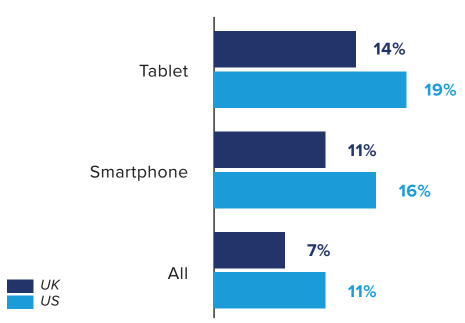
The majority of subscriptions are for the biggest news brands or for those delivering financial news. In the United States 30% of those subscribing to a digital news service paid for the *New York Times*, 32% for a local or city paper, and 16% for the *Wall Street Journal*. *The Times* in the United Kingdom, *Bild* in Germany, *Le Monde* in France, and *El Mundo* in Spain are leading the pack in paid news in their countries.

In a number of countries we also explored the motivations for subscription (see Figure on p. 13 in the executive summary) and in the United Kingdom also asked why people *continued* to pay. A key motivation for signing up is the desire to access the brand they enjoy whenever and wherever they want – a key advantage of new devices such as smartphones and tablets. Once signed up for an online service, the quality of the product is the key factor in whether they stay and renew their subscription. This may relate to the quality of specific writers, of a particular section or of the news coverage itself, but overall two-thirds (67%) signed up for quality of content, 80% stayed because of it.

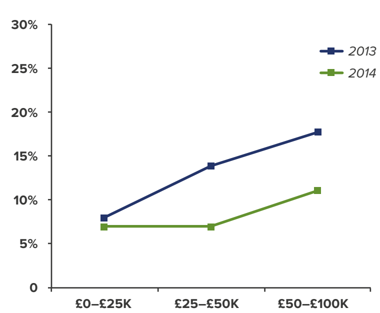
The importance of tablets and smartphones as a way of enticing new subscribers is reinforced by data (see the figure), which show that tablet users in particular are roughly twice as likely to pay for news as the overall sample in both the UK and US. Personal income also pays a role in willingness to pay.

FACTORS INFLUENCING PAYMENT FOR NEWS – US AND UK

Paid online content by device



Paid for digital content by personal income (UK)*



* See note on previous page re lack of direct comparability between 2013 and 2014 figures

Q7. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year (this could be an ongoing subscription or one off payment for an article or app)?

Base: UK all=2082, tablet news users=481, smartphone news users=635; USA all=2197, tablet news users=429, smartphone news users=673.
Base: UK 2014 – £0 to £25k (673), £25 to £50k (594), £50k to £100k (264) Chart shows % yes

Because tablet and smartphone users tend to be wealthier, better educated, and more interested in news, we wanted to understand if the nature of the device itself (e.g. the ease of payment through the Google or Apple stores) could be encouraging payment. When running a statistical model controlling for variables such as interest in news, education, and income, we do find a significant positive correlation with device in the case of Apple tablets – in the UK and the US, as well as for non-Apple tablets in the UK. We do not, however, find a positive correlation for smartphones using any operating system, probably because news organisations have mainly been focusing their monetisation and marketing on the tablet editions.

For those who aren't currently paying for digital news, a significant percentage expects to pay at some point in the future. Consumers in Italy and Spain show more willingness than those in Northern European countries. In the United Kingdom, we see a slight increase in the number of UK consumers that would consider paying for digital content in the future – from 5% to 7%.

Among them, younger age groups and those with a tablet or smartphone are more likely to pay.

See Essay: Robert G. Picard, New Approaches to Paid Digital Content, p. 80.

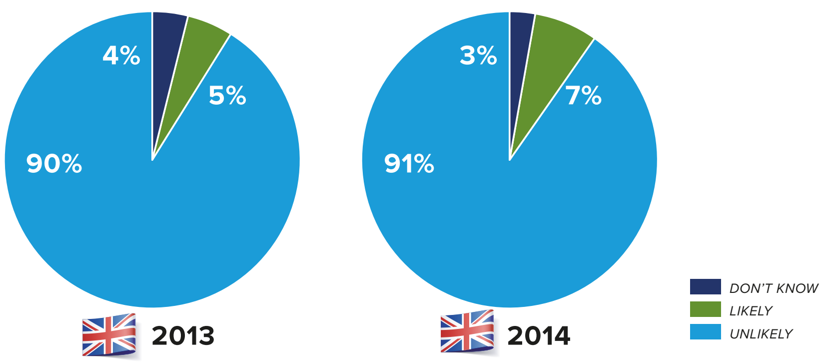
IMPACT OF DEVICE ON PAYMENT AFTER CONTROLLING FOR VARIABLES

	US	UK
APPLE TABLET	60%	110%
TABLET (OTHER MANUFACTURER)	NSS*	112%

Summary of the regression model in the UK and US when assessing the impact of device and controlling for interest in news, education and income (more detail at digitalnewsreport.org)

* NSS We did not find a statistically significant relation in this example. Elsewhere results are significant at the 95% confidence level. Percentages in the cells tell us by how much the likelihood of paying or sharing news online changes

LIKELIHOOD TO PAY FOR DIGITAL NEWS IN THE FUTURE BY COUNTRY



COUNTRY	LIKELY TO PAY
BRAZIL	**61%**
ITALY	**23%**
SPAIN	**21%**
GERMANY	**15%**
US	**11%**
DENMARK	**11%**
FINLAND	**11%**
FRANCE	**10%**
JAPAN	**8%**

	18–24	25–34	35–44	45–54	55+	SMARTPHONE OWNER	TABLET OWNER	COMPUTER OWNER
% LIKELY TO PAY	13%	12%	7%	5%	3%	9%	11%	5%

Q7aii. You said you have not paid for online digital content in the last year. How likely or unlikely would you be to pay IN THE FUTURE for online news from particular sources that you like?

Base: All countries. All those who have not paid (various)

ONLINE NEWS IN DETAIL

In this section we look in more detail at online consumption habits; which devices people use to access online news, what they access, and how they find and share the content they enjoy.

/// 4.1 THE GROWTH OF MULTI-PLATFORM NEWS

The rise and rise of tablets and smartphones

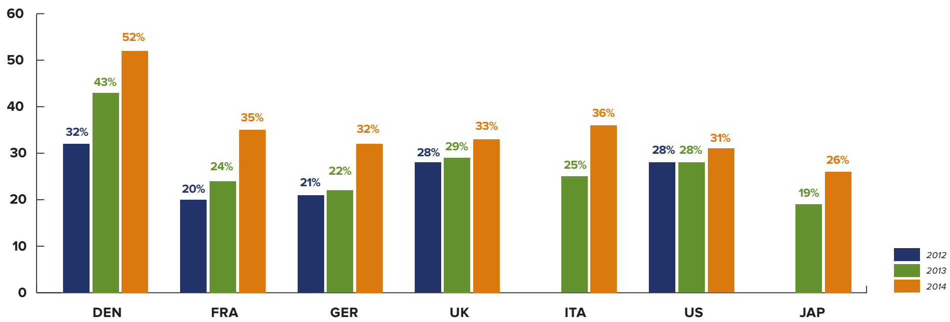
Overall we find that more people are accessing news through a greater number of devices than ever before. The computer remains the most important device for online news, but for many this is now supplemented by heavy usage of smartphones and tablets.

Across all our countries 58% of our sample use a smartphone (up from 46% last year) and 37% say they used the device for news at least once in the past week (up from 31%).

Denmark has the highest weekly news usage of smartphones at 57%, with Japan showing the lowest level at 26%. France and Germany have seen the biggest increase over the past 12 months (10% and 14% increases respectively)

One in three (34%) use a tablet, with 20% on average using it for news – another significant increase. The biggest national increases have been in Denmark (28–36%) and the UK (17–24%) where low-cost supermarket tablets have opened the market to a broader demographic.

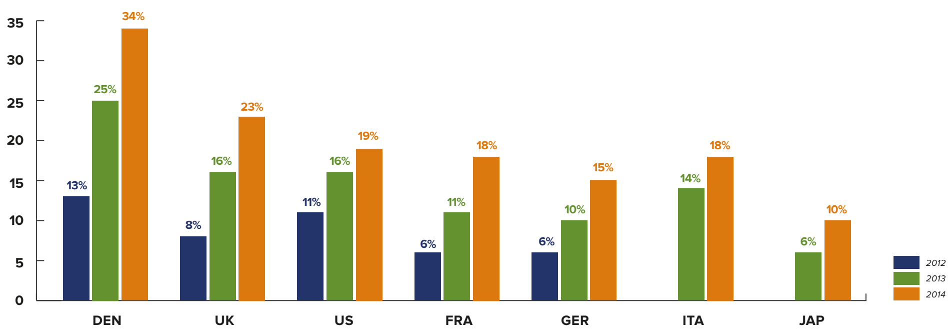
GROWTH IN SMARTPHONE ACCESS FOR NEWS – SELECTED COUNTRIES



Q8b. Which, if any, of the following devices have you used to access news in the last week? Net smartphone shown

Base: UK=2082, Germany=2063, Italy=2010, France=1946, Denmark=2036, US=2197, Japan=1973

GROWTH IN TABLET ACCESS FOR NEWS – SELECTED COUNTRIES



34% have access to a tablet across our ten countries

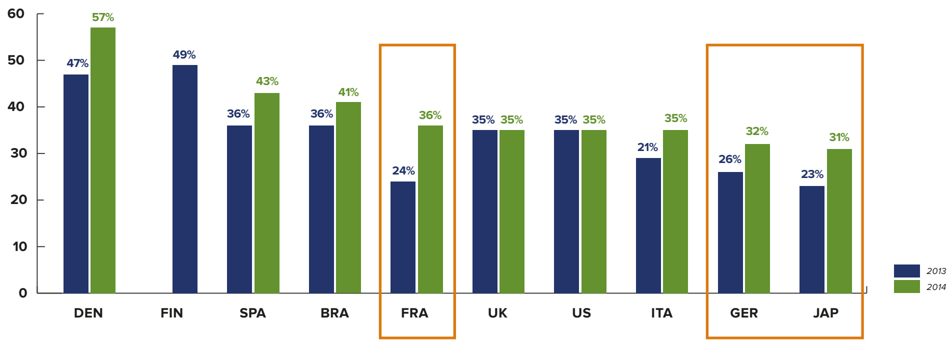
Q8b. Which, if any, of the following devices have you used to access news in the last week? Net tablet shown

Base: UK=2082, Germany=2063, Italy=2010, France=1946, Denmark=2036, US=2197, Japan=1973

Across all those using digital devices to access news almost four in ten (39%) now use more than two digital devices to access the news, up from 33% in 2013. The number using more than three devices has grown from 9% to 12%.

Over the last year, Germany, France, and Japan have caught up with other large nations – moving from a quarter to a third using more than two devices weekly.

% USING MORE THAN TWO DEVICES TO ACCESS NEWS BY COUNTRY



Multiplatorm users are more likely to be men and under 45

Q8b. Which, if any, of the following devices have you used to access news in the last week?

Base: All who use digital devices 2014 UK=2019, US=2070, Germany=1853, France=1815, Denmark=1914, Spain=1988, Finland=1470, Italy=1958, Brazil=955, Japan=1836

In most countries fewer than 50% use a single device to access news. Japanese (62%) are almost twice as likely as Danes (35%) to stick to a single device – but almost everywhere we see a significant move to multi-platform use.

The overall number using a computer to access news each week has slipped from 73% to 67%.

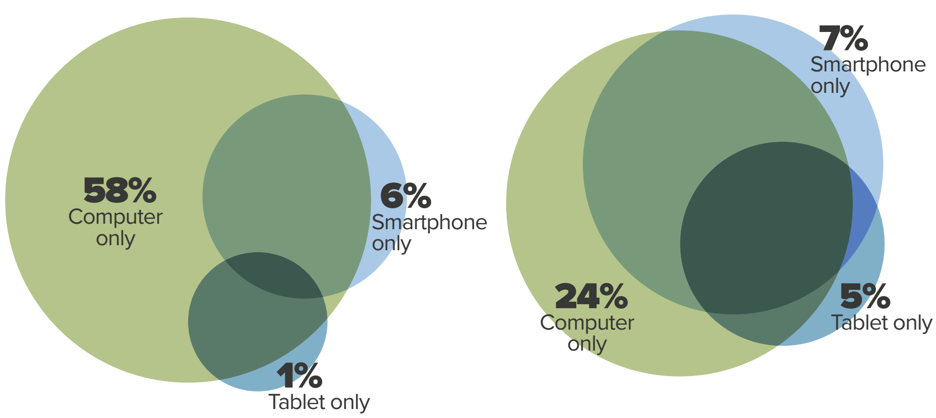
To illustrate the different pace of adoption, we can set out the device overlaps for Japan and Denmark, the countries at the two extremes. Of those using devices for news 24% ONLY use a computer in Denmark, compared with 58% in Japan who ONLY use a computer. In Denmark 42% use a smartphone and a computer in combination and in Japan that figure is only 21%.

In Denmark, which is a leader in multi-platform use, we see more overlaps and significant numbers relying on new devices. In the UK those who say the smartphone is now their MAIN device for accessing digital news has risen from 15% to 24% in a year. That rises to 43% of those aged 25–34.

OVERLAPS IN DEVICE USAGE FOR NEWS – JAPAN VS DENMARK

JAPAN

Computer	**91%**
Smartphone	**31%**
Tablet	**12%**



DENMARK

Computer	**79%**
Smartphone	**61%**
Tablet	**39%**

Q8b. Which, if any, of the following devices have you used to access news in the last week?

Base: All who use any device for news Denmark=1747, Japan=1707. NB Missing percentage accounts for those who use other devices, including those who use the three shown but in a combination outside of the Venn diagram

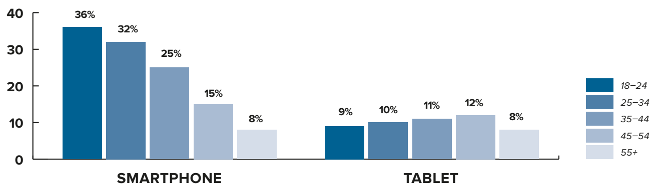
Young prefer smartphone, tablets more evenly split

Across our global sample we can see the same trends with the younger half of the population more dependent on smartphones for news. In stark contrast, the tablet's larger screen size and greater simplicity makes this device more appealing to older age groups. Globally, one-third of 18–34 year olds say the smartphone is their *main* way of accessing digital news.

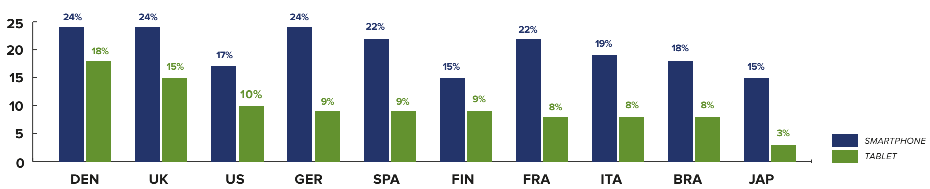
As the overall ownership figures rise, both tablets and smartphones are reaching a broader cross-section of news users. In the UK, the proportion of News Lovers (heavy and frequent news users) has fallen since 2013 for both devices. Looking at smartphone news users, 55% now fall into the Daily Briefers category (51% in 2013). 22% of tablet news users are now from our Casual Users category (15% in 2013).

MAIN DEVICE FOR ACCESSING NEWS BY AGE AND COUNTRY

Smartphone and tablet by age (2014)



Main device for news by country



Q8.5b. Which, if any, of the following devices have you used to access news in the last week? MAIN SOURCE

Base: All who said Smartphone was MAIN source of news 2014 –15924

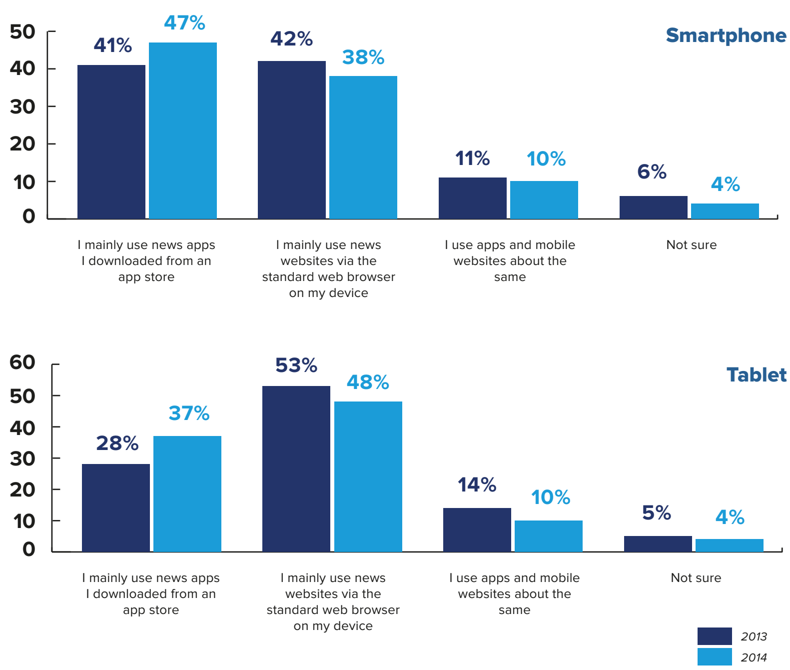
Base: UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, US=2197, Urban Brazil=1015, Japan=1973

News apps and the mobile web

With more news websites using websites optimised for small screens, it is something of a surprise to see the continued preference for news apps in some (but not all) countries. In the UK the proportion using smartphone and tablet apps has grown significantly since last year. Apps in general are more widely used on smartphones where screen real estate is limited, offline access is important, and where speed is paramount.

We see a very different picture in Finland, however, the only other country where we tracked this question in 2014. Here, access to news sites is mainly via a web browser, which may be related to the popularity of 'Finnish' Nokia-phones that have a Windows operating system.

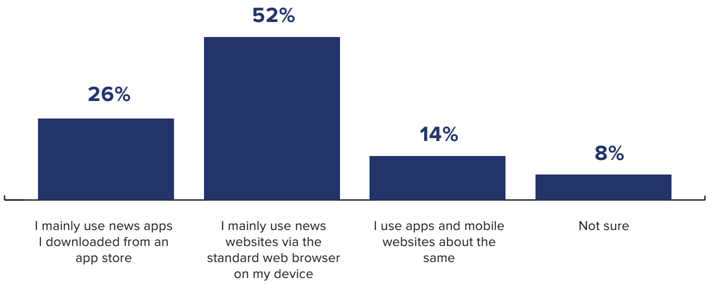
APPS VS MOBILE WEB BY DEVICE AND YEAR (UK)



Q9a. When you look for news on a MOBILE/TABLET, which of the following statements most applies to you?

Base: Accessed via a smartphone in the last week = 650; all who have accessed news via a tablet in the last week = 481

APPS VS MOBILE WEB VIA MOBILE (FINLAND)



Q9a. When you look for news on a MOBILE, which of the following statements most applies to you?

Base: 667 – all who have accessed news via a smartphone in the last week

Apple vs the rest

In an increasingly competitive market, the overall proportion of Apple smartphone and tablets is falling, but the picture differs by country and device. Denmark, the US, the UK, and Japan show the strongest allegiance to Apple devices – particularly for iPad tablets. Elsewhere, other handsets based on the Android, Blackberry, or Windows operating systems have collectively built up a commanding lead.

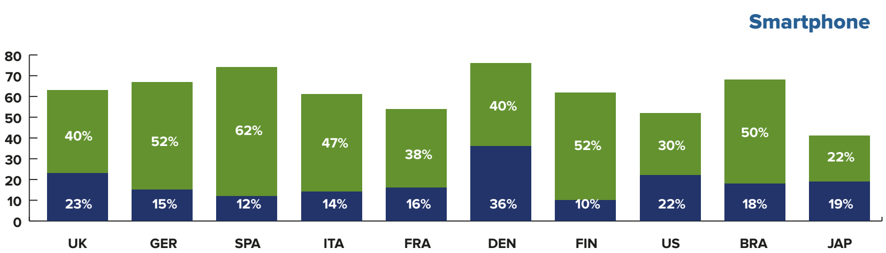
This is important because Apple users are significantly more likely to use news apps. In the United States, 42% use a news app on an iPhone vs 32% for those with other smartphones. 25% use news apps on an iPad compared with 20% for those with other tablets. Apple users are also significantly richer than users of other phones and they are almost twice as likely to be paying for news.

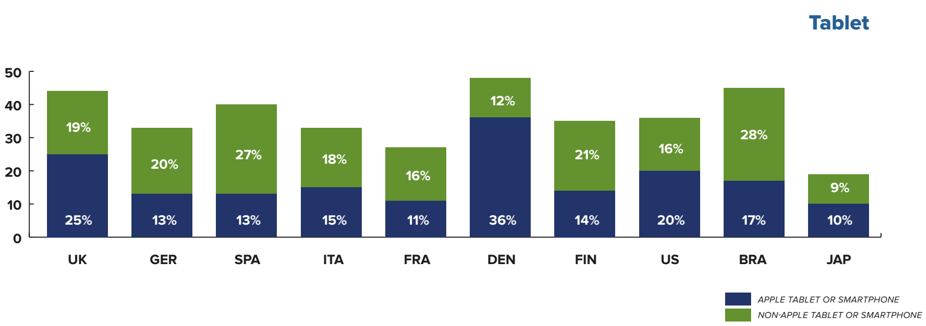
The role of branded icons on smartphone and tablet

In the UK, most smartphone and tablet users start their news journeys via the logo of a news brand, rather than search engines or social networks. However apps that aggregate news – like Pulse, Flipboard, and Zite – are considerably more popular on smartphones at the expense of both brand and search. These apps are twice as likely to be used by women as by men (19% vs 10%). Social networks are also popular with women as a way of accessing news on the move (12% vs 4%) and with younger people generally. Men are much more likely to access via a branded link (50% vs 38% for women).

It really is the personal nature of the smartphone combined with the frequency of access and limited real estate that is creating different behaviours compared with both tablet and desktop.

USE OF SMARTPHONES AND TABLETS: APPLE VS THE REST

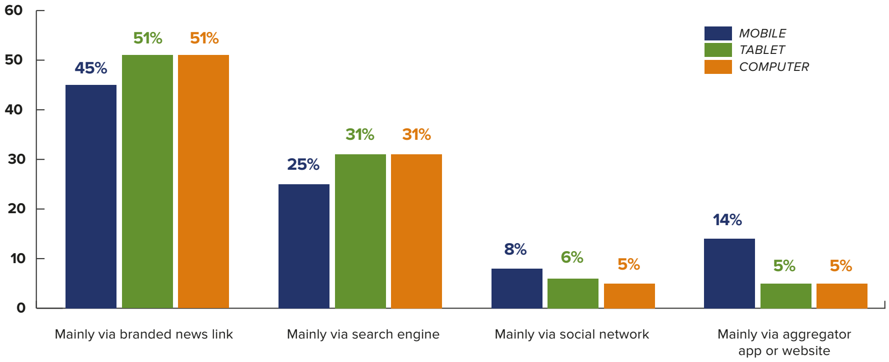




Q8a/b. Which, if any, of the following devices do you ever use for any purpose? Apple and non-Apple codes shown

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, US=2197, Urban Brazil=1015, Japan=1973

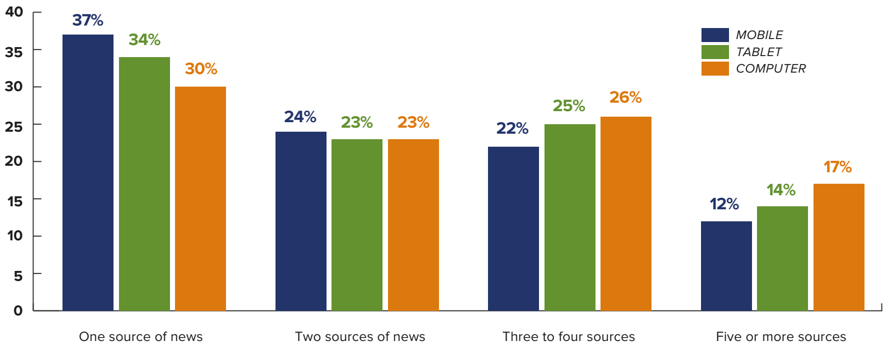
GATEWAYS TO NEWS ON COMPUTERS MOBILES AND TABLETS – UK



Q9c. Thinking specifically about when you look for news on a MOBILE,/TABLET/COMPUTER which of the following statements most applies to you? Please select one answer

Base: All mobile news users=650, tablet=481, computer=1236

NUMBER OF SOURCES USED PER DEVICE – ALL COUNTRIES



Q19a. You say you access news via a SMARTPHONE/TABLET/COMPUTER. When using that device what news sources have you accessed in the last week?

Base: All smartphone=7165, tablet=3774, computer=12618

Smartphone users consume fewer news sources

One further indication of this is that, when using a smartphone, fewer sources of news are used than when accessing via a tablet or computer. We asked our respondents to select the sources they used on each device from a given list of top news sources in each country. On a smartphone, across all our countries 37% said they only used one source of news, compared with 30% on a computer – and 12% accessed more than five sources compared with 17% on a computer.

In the United Kingdom, where there is a relatively small number of big online news brands, 55% of our sample said they accessed only one source of news when accessing via a smartphone compared with 45% on a computer.

Multi-platform usage extends options

The growth of smartphones and tablets has not generally come at the expense of other media, but is instead increasing the range of options.

Tablet users are just as likely – or more likely – to consume TV news (86%) or read a printed newspaper (45%) in a given week when compared with the average user as are smartphone users (84% and 40% respectively).

Heavy smartphone users are a little less likely to read a news-paper in some countries – possibly related to the substitution that we've seen on the daily commute (see section 2.4).

USE OF A PRINTED NEWSPAPER BY SMARTPHONE AND TABLET USERS – SELECTED COUNTRIES

	ALL	HEAVY TABLET USERS	HEAVY SMARTPHONE USERS
US	24%	22%	21%
UK	43%	47%	28%
SPAIN	47%	55%	41%
DENMARK	32%	32%	29%

Q3. Which, if any, of the following have you used in the last week as a source of news?

Base: All users: users who say the tablet/smartphone is their MAIN way of accessing the news

Smart and connected TVs

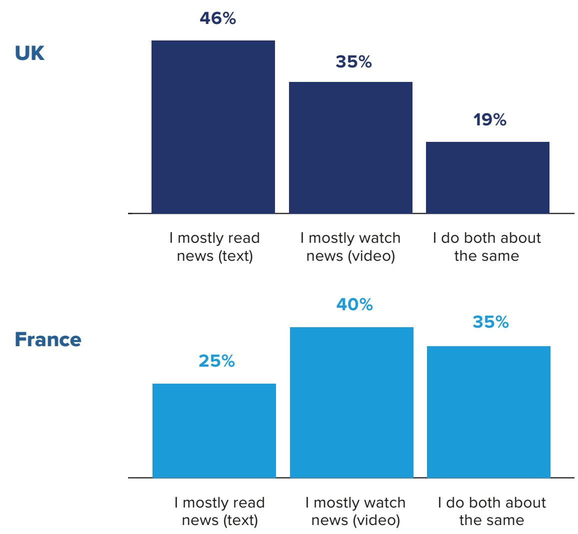
Over the past few years the number of TVs that have direct or indirect access to the internet has grown rapidly. We define smart TVs as having the capability to connect directly to the internet; they often come preloaded with apps for video on demand but also some news apps. Connected TVs normally connect to internet services via a set-top box or other connector such an Apple TV. Increasingly, these services too offer video- or text-led news services including travel and weather.

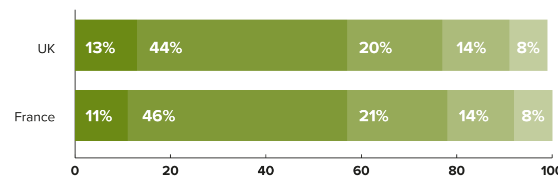
Spain, France, Denmark, and Germany lead the way for smart and connected TVs but in most countries news use remains relatively modest – compared with tablets and smartphones. Even so, broadcasters and news providers are developing new services and offerings for this platform.

As last year, we asked about the type of content currently accessed via smart TV in the UK and France – and about potential interactive features. In the UK, most respondents used text-based news services on their TV. The main broadcasters offer digital text news services with some video. In France, the reverse is true, with most consumers watching on-demand news video and text services a secondary attraction.

In both the UK and France, the most popular news types accessed on a smart or connected TV were serious news, local news, and weather updates. In terms of future functionality, there was interest in being alerted to news whilst watching another programme. In both countries, 57% of those who use their smart TV for news said they would be interested in an onscreen breaking-news overlay. This rises to 66% amongst men (UK).

VIDEO VS TEXT NEWS SERVICES ON TV – UK AND FRANCE





In both countries, **57%** of those who use their smart TV for news would be interested in an on screen breaking news overlay.

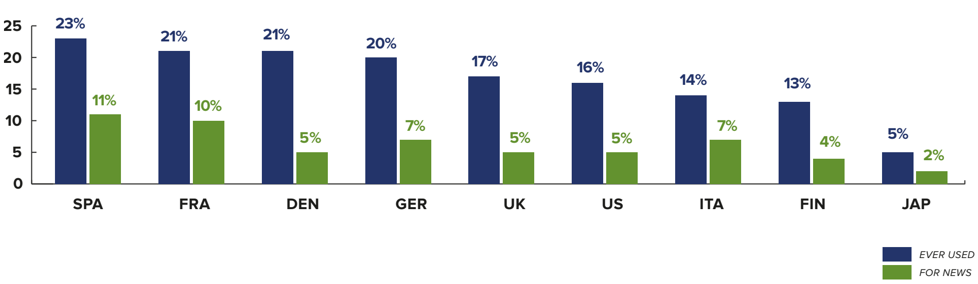
Rises to **66%** amongst men (UK).

Q14c. Do you prefer to read or watch news using your smart or connected TV? Which of the following statements most applies to you?

Q14d. A connected or smart TV makes it possible to deliver a breaking or other news alert on the screen as an overlay to an existing TV programme. It would be possible for you to control the frequency and type of alerts and to turn it on or off. How interested would you be in using such a service?

Base: All who used connected or smart TV for news in past week UK=110, France=190

SMART AND CONNECTED TV USERS – SELECTED COUNTRIES



Q8a/b. Which, if any, of the following devices do you ever use for any purpose/news in the last week? Smart TV and connected TV codes shown

Base: All/all who use these devices for any purpose – UK=2082/2019, US=2197/2070, Germany=2063/1865, Spain=2017/1988, Finland=1520/1470, Brazil=1015/955, France=1946/1815, Denmark=2036/1914, Japan=1973/1836, Italy=2010/1958

/// 4.2 TYPES OF NEWS AND THE ROLE OF VIDEO

Over the past few years, news publishers have been increasing the range of formats they publish online. Live pages or live blogs have become popular on breaking news stories; picture slideshows and interactive graphics have become popular along with video and audio clips and long-form programmes.

In terms of online content we can see that traditional articles and story lists (e.g. a news front page) remain the most accessed on a weekly basis. Even so, new formats are beginning to take hold. Picture stories and slideshows are popular everywhere except for Denmark (6%) while news graphics are especially well viewed in Japan and Finland. Some countries seem to have taken faster to video content, in particular the United States, and Brazil. Video is typically twice as popular as audio, with the exception of Denmark and Spain where it is the other way round.

TYPES OF ONLINE NEWS CONTENT ACCESSED BY COUNTRY

	UK	FRA	GER	DEN	ITA	SPA	JAP	BRA	US	FIN
LIST OF NEWS HEADLINES	59%	53%	47%	48%	49%	56%	75%	66%	59%	72%
READ LONGER STORIES	43%	44%	50%	25%	60%	40%	57%	36%	45%	53%
LIVE PAGE	8%	8%	6%	7%	15%	12%	12%	18%	9%	7%
NEWS RELATED BLOG	7%	7%	8%	5%	20%	11%	9%	22%	18%	6%
PICTURES	14%	16%	21%	**6%**	15%	19%	18%	**30%**	**19%**	14%
GRAPHICS	4%	5%	7%	3%	7%	6%	**14%**	5%	10%	**15%**
VIDEO	16%	15%	16%	**10%**	20%	**17%**	10%	**27%**	**30%**	18%
AUDIO	5%	8%	9%	**16%**	17%	**22%**	4%	11%	12%	8%

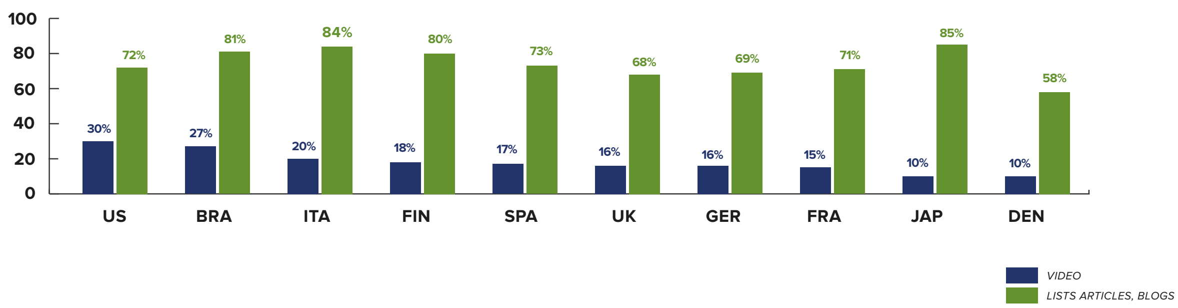
Q11. Looking at news online in the last week which of the following ways of consuming news did you use?
Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, US=2197, Urban Brazil=1015, Japan=1973

Spotlight on video usage

Video formats are a particular point of interest for publishers. Newspapers like the *New York Times* and *Wall Street Journal* have invested in video skills and equipment. Pure players like NowThisNews, Buzzfeed, and the Huffington Post are also investing, not least because video tends to get virally shared in social media and is popular with advertisers. In this year's report we have looked in detail at the types of video being consumed and the reasons for adoption and non-adoption.

Overall usage remains low compared to text, but some countries like the US and Brazil appear to have a more visual approach to news. Others like Denmark and Japan prefer to stick to text. Overall video users are more likely to be male, better educated, and more interested in news (News Lovers). Age does not seem to be a factor in adoption of video news. It is not clear whether adoption is a function of supply. Consumption remains modest in the UK despite a healthy supply of online news video content.

WEEKLY VIDEO CONSUMPTION VS TEXT BY COUNTRY



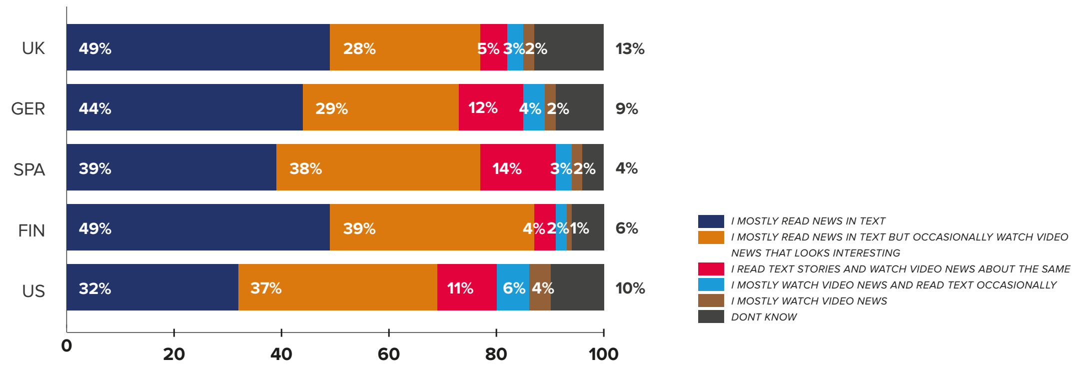
Q11. Looking at news online in the last week which of the following ways of consuming news did you use?
Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, US=2197, Urban Brazil=1015, Japan=1973

In five countries we asked extra questions about preferences towards video or textual news. In all cases the vast majority preferred to read news or mainly read news – with video as a supplementary format. However, a small minority – about 10% in the United States – actually prefer to access online news in video form.

Barriers to usage of video

While many prefer the flexibility and convenience of text, there are also practical reasons why video is not more widely adopted. On average, one quarter (24%) said they would prefer to watch video on a bigger screen – and this is particularly the case for the over 45s. Almost one fifth (18%) were frustrated at the length of time it took to load up a video. This impatience was far more evident for younger age groups, who expect web applications to respond instantly.

PREFERENCES AROUND READING OR WATCHING NEWS BY COUNTRY



Q11d. In thinking about your online news habits, which of the following statements applies best to you?

Base: All markets – UK=2082, Germany=2063, Spain=2017, Finland=1520, US=2197

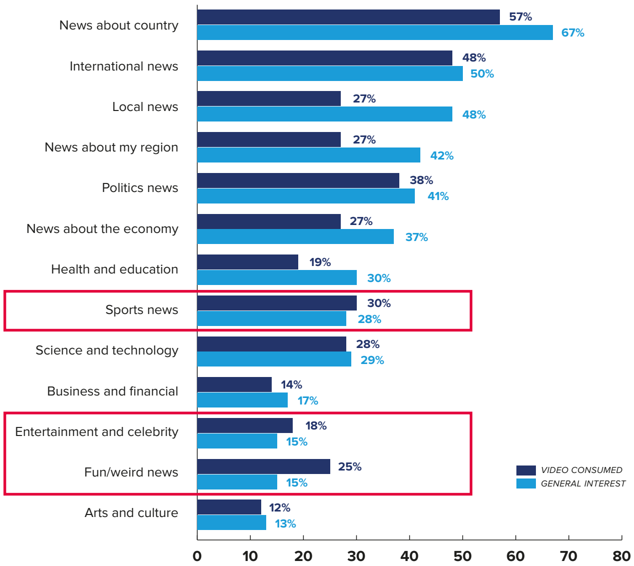
REASONS FOR NOT USING VIDEO

	UK	GER	SPA	FIN	US
I DON'T FIND THEM INTERESTING	12%	13%	11%	14%	13%
I DON'T HAVE TIME	17%	16%	15%	15%	18%
I CAN'T GET THEM TO PLAY PROPERLY	7%	5%	5%	12%	7%
TAKE TOO LONG TO LOAD UP/PLAY	**14%**	**18%**	**19%**	**19%**	**19%**
I WOULD RATHER WATCH ON A BIGGER SCREEN	**26%**	**23%**	**29%**	**26%**	**24%**
I PREFER TO READ ARTICLES THAN WATCH VIDEOS	38%	46%	38%	52%	39%
CONCERN ABOUT COST OF ACCESS (EG VIA MOBILE)	5%	8%	8%	3%	4%

Q11ai. You said that you don't usually watch news videos online. Why not? (Please select all that apply)

Base: All who don't watch news videos online – UK=1729, Germany=1721, Spain=1664, Finland=1242, USA=1862

POPULAR VIDEO VS GENERAL INTEREST BY NEWS TOPIC – AVERAGE OF FIVE COUNTRIES



Q2/11b. Which of the following types of NEWS/VIDEO NEWS is most important to you/do you watch most frequently online? Please choose up to five.

Base: All/All who watch video, UK=2082/353; Germany 2062/342; Spain 2017/353; Finland 1520/278; USA 2197/687

Content topics consumed in video tend to be different from declared interest in news generally. For example, our respondents say they are very interested in regional and local news but consume very little local video – when averaged across our five countries. By contrast the amount of fun/weird news or sports news consumed in video format is far greater than declared general interest levels.

Types of video news

A range of video formats is accessed by consumers in our five countries. Short news clips deliver most value for most users, either in providing eyewitness testimony – particularly on a breaking story – or additional context. This might include a reporter's analysis or an interview with an expert that supports the text content on a page.

Live streams are popular on big breaking-news stories across all genders and ages, whereas scheduled streams such as Prime Minister's Questions in the UK tend to be watched by men and members of our News Lover category (28% vs 5% for Casual Users). Tablets and smartphones seem to be encouraging more consumption in particular, with 47% of tablet video users and 45% of smartphone video users watching a live news stream in a given month compared with just 36% via a computer.

TYPE OF VIDEO AND AUDIO CONTENT CONSUMED IN LAST MONTH
CONSUMERS TURN TO VIDEO FOR DRAMA AND CONTEXT

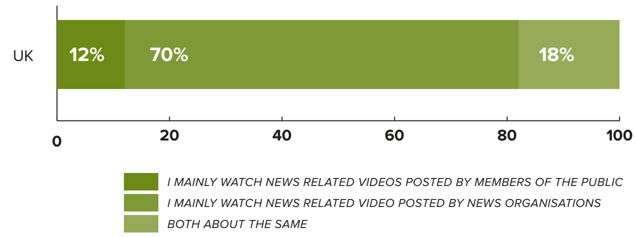
	UK	GER	SPA	FIN	US
LIVE STREAM COVERAGE OF A BREAKING NEWS EVENT	32%	38%	31%	40%	33%
LIVE STREAM COVERAGE OF OTHER SCHEDULED NEWS EVENT (EG POLITICAL SPEECH, TECH LAUNCH, FASHION EVENT ETC)	17%	29%	26%	24%	24%
NEWS CLIP THAT ADDS DRAMA TO A TEXT STORY (EG EYEWITNESS TESTIMONY, RAW FOOTAGE OF A NEWS EVENT)	51%	44%	57%	54%	45%
NEWS CLIP THAT PROVIDED CONTEXT OR ANALYSIS ON A TEXT STORY (EG JOURNALIST/POLITICIAN TALKING TO CAMERA, OR A SHORT INTERVIEW)	54%	32%	54%	44%	49%
LONGER NEWS PROGRAMME ACCESSED ON DEMAND (EG A STREAM OR DOWNLOAD OF POLITICS, HEALTH, TECH, FILM, FOOD)	21%	37%	28%	18%	19%

Q11aii. Which TYPES of news video have you watched online in the last month? (Please select all that apply)

Base: All who have watched news videos online in past month – UK=353, Germany=342, Spain=353, Finland=278, US=687

In the UK, most video consumed online is from professional news organisations rather than user-generated content. Traditional news brands are strong in the UK so this is perhaps not surprising and only 6% of our sample say they get news from YouTube so we might expect a very different percentage in other countries. The question was only asked in the UK this year.

ORIGIN OF NEWS VIDEOS – PROFESSIONAL VS USER GENERATED (UK ONLY)



Q11c. When thinking about online video news, which of the following statements applies best to you?

Base: UK video users = 353

/// 4.3 PATHWAYS TO NEWS: HOW AUDIENCES DISCOVER NEWS ONLINE

Our work on brands (section 1) shows that audiences consume the majority of their online news from familiar and trusted brands, but we can also see that they are using increasingly varied ways to find that content. In the process, Google, Facebook, and Twitter have become – to a greater or lesser extent – intermediaries for a large proportion of news journeys online. As a result, some publishers complain that they have been able to take a significant share of the available advertising revenue around news, thereby making the funding of trusted content more uncertain.

Our data show that brand is the primary gateway in Denmark, Finland, the UK, while search is most important in France, Germany, Italy, the US, and urban Brazil.

Within these averages there are significant differences between and within countries. In Finland and Denmark we see brand, followed by search and social, with younger groups preferring social and older groups preferring search. But in Germany and Italy we see a different pattern with search as the main gateway.

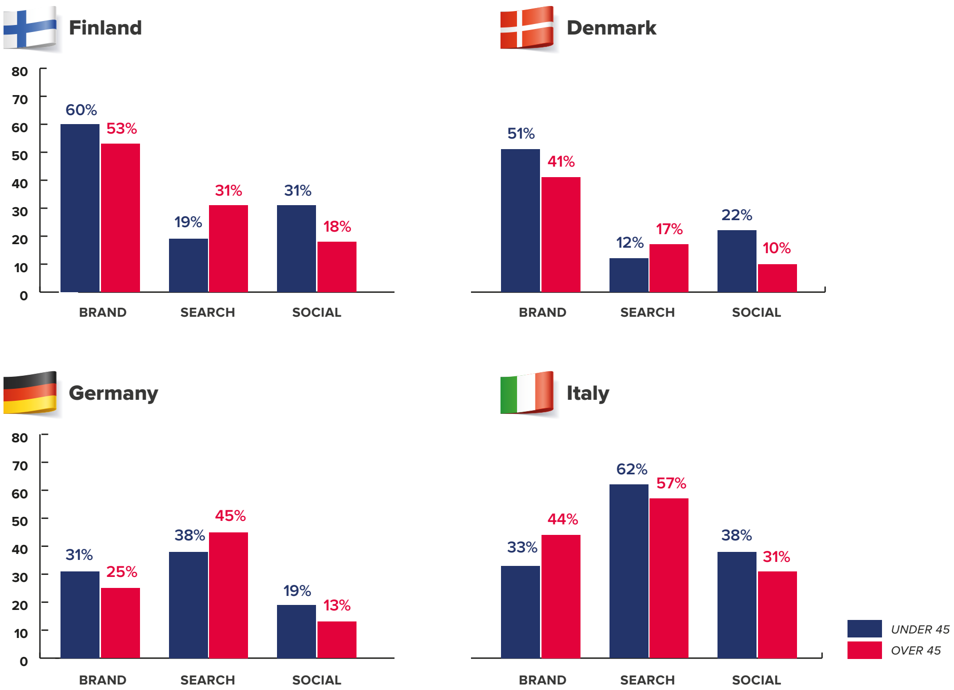
TOP WAYS OF FINDING NEWS BY COUNTRY

	UK	FRA	GER	DEN	ITA	SPA	JAP	BRA	US	FIN
DIRECTLY VIA BRAND	**45%**	23%	27%	**46%**	39%	**46%**	20%	46%	33%	**57%**
SEARCH ENGINE	29%	**40%**	**42%**	15%	**59%**	35%	**41%**	**59%**	**40%**	26%
SOCIAL MEDIA	17%	14%	15%	16%	34%	38%	12%	46%	28%	24%
EMAIL	9%	24%	12%	16%	12%	12%	18%	22%	27%	11%
NEWS AGGREGATOR	4%	5%	9%	7%	6%	7%	13%	5%	8%	14%
MOBILE PHONE ALERT	3%	6%	4%	7%	4%	5%	6%	10%	6%	5%

Q10. Which were the ways in which you came across news stories last week? (Please select all that apply)

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, US=2197, Urban Brazil=1015, Japan=1973

TOP WAYS OF FINDING NEWS BY COUNTRY



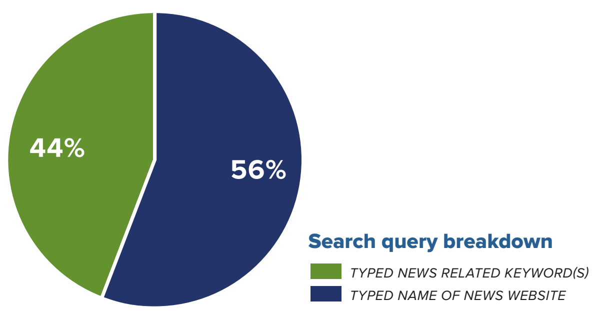
Q10. Which were the ways in which you came across news stories last week? (Please select all that apply)

Base: Finland=1520, Denmark=2036 Germany=2063, Italy=2010

But within the search category there are some important nuances. Our data allow us to break down different types of query and we find that on average more than half (56%) relate to navigation to a particular website. In countries with stronger brands such as Denmark and the UK the percentage tends to be even higher (62% and 60% respectively).

In terms of demographics, social media are far more important for younger groups with 18–24s more than twice as likely to find news that way (38% vs 17% for over 55s). Women are more likely to use social media sites like Facebook to discover news (22% vs 18% for men). By contrast, Twitter skews slightly male. Men are more likely to go straight to a news brand (as are News Lovers).

SEARCH GATEWAYS IN DETAIL – ALL COUNTRIES



Q10. Which were the ways in which you searched LAST WEEK? Showing codes 2 and 3 for different types of searches

Base: All = 18836

TOP GATEWAYS TO NEWS BY AGE, GENDER AND NEWS SEGMENT

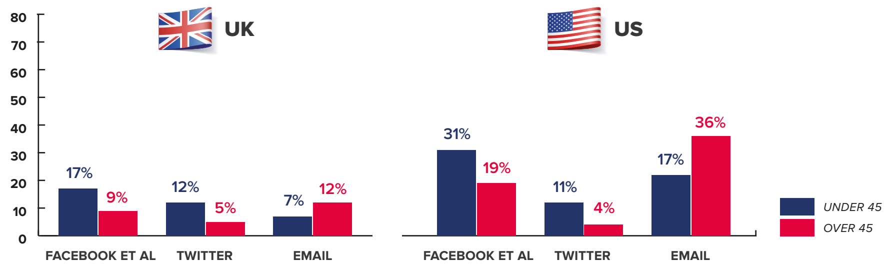
	18–24	25–34	35–44	45–54	55+	MALE	FEMALE	NEWS LOVERS	CASUAL USERS
SEARCH	40%	38%	39%	38%	37%	**39%**	**37%**	44%	32%
SOCIAL	38%	31%	24%	20%	17%	**21%**	**25%**	27%	22%
BRAND	35%	38%	39%	38%	37%	**42%**	**33%**	46%	24%

Q10. Which were the ways in which you came across news stories last week? (Please select all that apply)

Base: All = 18836

In comparing social media and email use between the UK and the United States, we can see that these gateways are almost twice as important in the US. In both countries, under 45s prefer social networks for sharing and discovering news while many over 45s are more comfortable with email. Twitter is particularly favoured by younger groups and is proportionally more important in the UK than in the US where Facebook, Google+, YouTube combined are three times more popular.

GATEWAYS COMPARED: SOCIAL MEDIA VS EMAIL



Q10. Which were the ways in which you came across news stories last week? Showing social media and email options

Base: UK=2082, USA=2197

/// 4.4 SOCIAL NETWORKS AND PARTICIPATION WITH NEWS

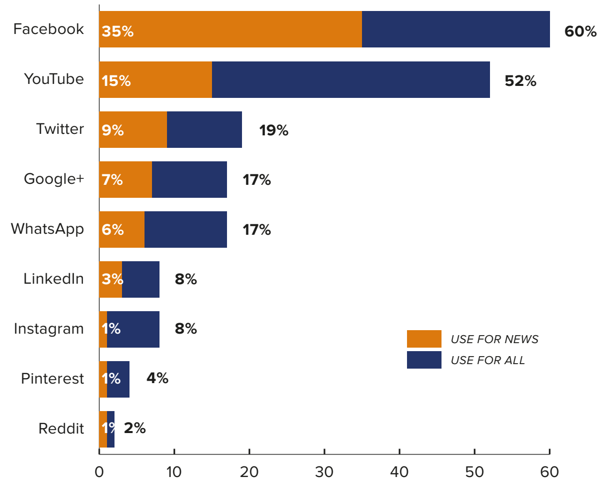
This year we have detailed data on the most popular social networks in each country – and the most popular for news. Previously we have only tracked these data for the UK while the Pew Research Center has published similar country data in the United States.[8] Our unique data from ten countries reveal that Facebook, YouTube, Twitter, Google+, and WhatsApp are by far the most important networks for news. Around half of Facebook (57%) and Twitter users (50%) say they find, share, or discuss a news story in a given week, but news is considerably less important in other networks. Only just over a quarter (29%) of YouTube users engage with news weekly, along with 19% of Instagram users. Reddit has a small but active community that is heavily engaged with news weekly (48%).

Internationally we can see significant variations in the extent different networks are used for news. Around 90% of Facebook users in Brazil and Italy use the network for news each week compared with less than half of those in the UK.

Twitter is popular in Spain, the UK, and Japan, but Google+ is far more extensively used in Germany, France, and Denmark. YouTube is used for news by 23% in France and 26% in Italy, but only by 6% in Denmark and 8% in the UK where there is very little professional news content distributed via YouTube.

Outside the big four, we find some important national and niche social networks. In Finland, Ampparit is a popular news aggregator similar to Digg or Reddit. Suomi24 is the most popular general discussion forum. Tuenti in Spain and Line in Japan are messaging networks operating in the same space as WhatsApp. Germany has a number of social networks including Xing, which competes across German-speaking countries with LinkedIn in business networking – also Stayfriends and Wer kennt wen. Orkut was once the biggest social network in Brazil but now attracts just 12% of our sample and Mixi has also been eclipsed by Facebook in Japan.

TOP SOCIAL NETWORKS AND TOP NETWORKS FOR NEWS – ALL COUNTRIES



Q12a/b. Which, if any, of the following have you used for any purpose/for news in the last week?

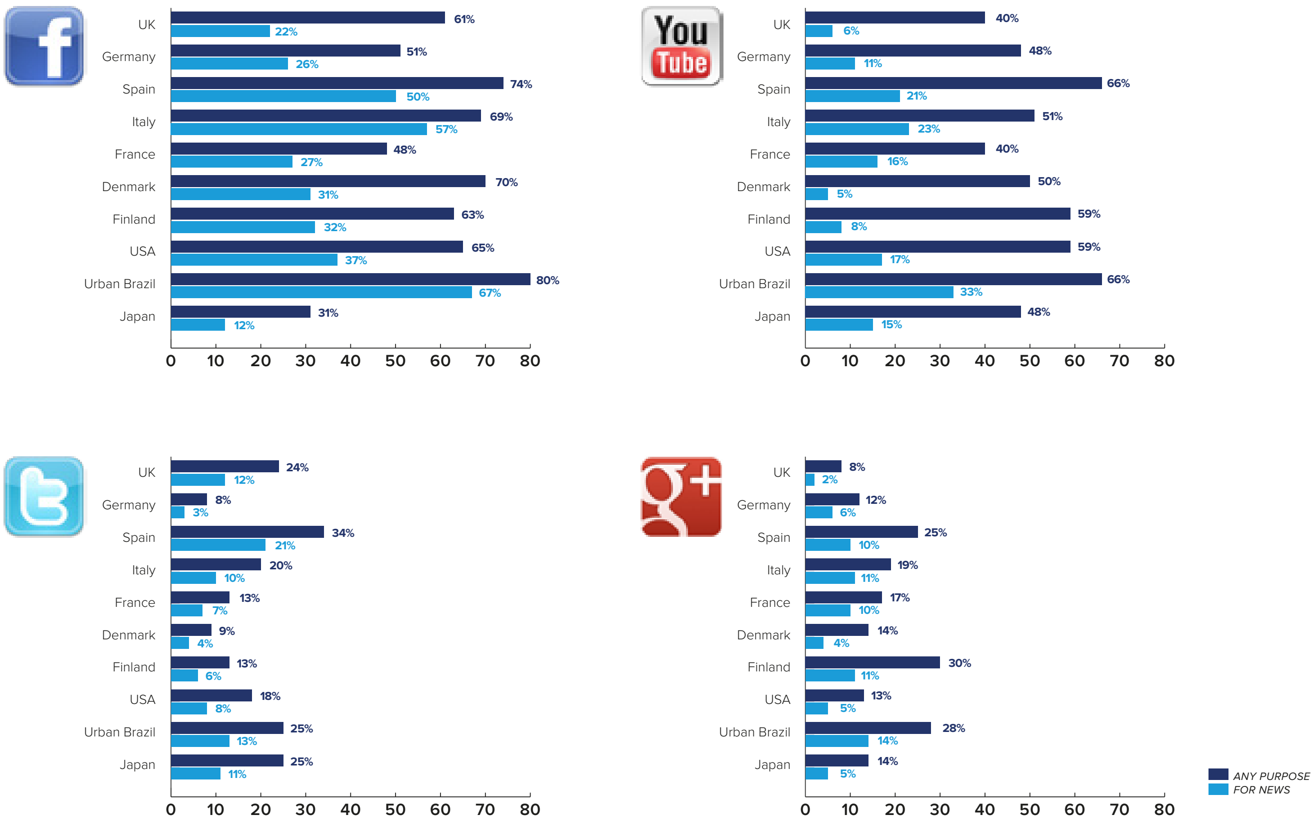
Base: All markets = 18859

COUNTRY-SPECIFIC NETWORKS

NETWORK	COUNTRY	USE FOR ALL	FOR NEWS
SUOMI 24	FIN	25%	8%
AMPPARIT	FIN	14%	12%
STAYFRIENDS	GER	11%	2%
XING	GER	9%	3%
TUENTI	SPA	10%	2%
MIXI	JAP	13%	5%
LINE	JAP	21%	5%
ORKUT	BRAZ	12%	3%

[8] http://www.journalism.org/2014/03/26/8-key-takeaways-about-social-media-and-news.

TOP FOUR SOCIAL NETWORKS BY COUNTRY



Q12a/b. Which, if any, of the following have you used for any purpose/for news in the last week?

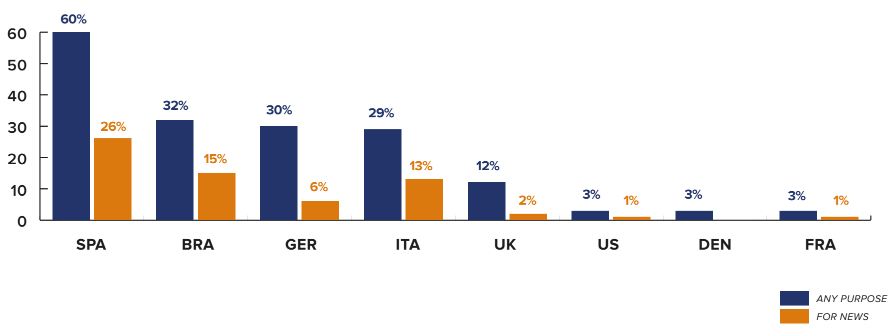
Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, USA=2197, Urban Brazil=1015, Japan=1973

Emergence of WhatsApp

One intriguing finding is the extent that messaging apps are now being used for discovering and sharing news. WhatsApp – now owned by Facebook – is used by over half of our sample in Spain (60%) and over a quarter (26%) say they use it for news. A third of our sample in Brazil, Germany, and Italy also use WhatsApp on a weekly basis (32%, 30%, and 29% respectively).

Over the past 12 months a number of news organisations have developed specific services for Instagram – also owned by Facebook – as a way of reaching younger audiences and given their popularity we can expect attention to switch to messaging services like WhatsApp and Line.

USAGE OF WHATSAPP BY COUNTRY



AGE (ANY PURPOSE)	%
18-24	28%
25-34	25%
35-44	20%
45-54	14%
55+	9%

Q12a/b. Which, if any, of the following have you used for any purpose/for news in the last week? WhatsApp code shown

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, US=2197, Urban Brazil=1015

Types of activity and participation

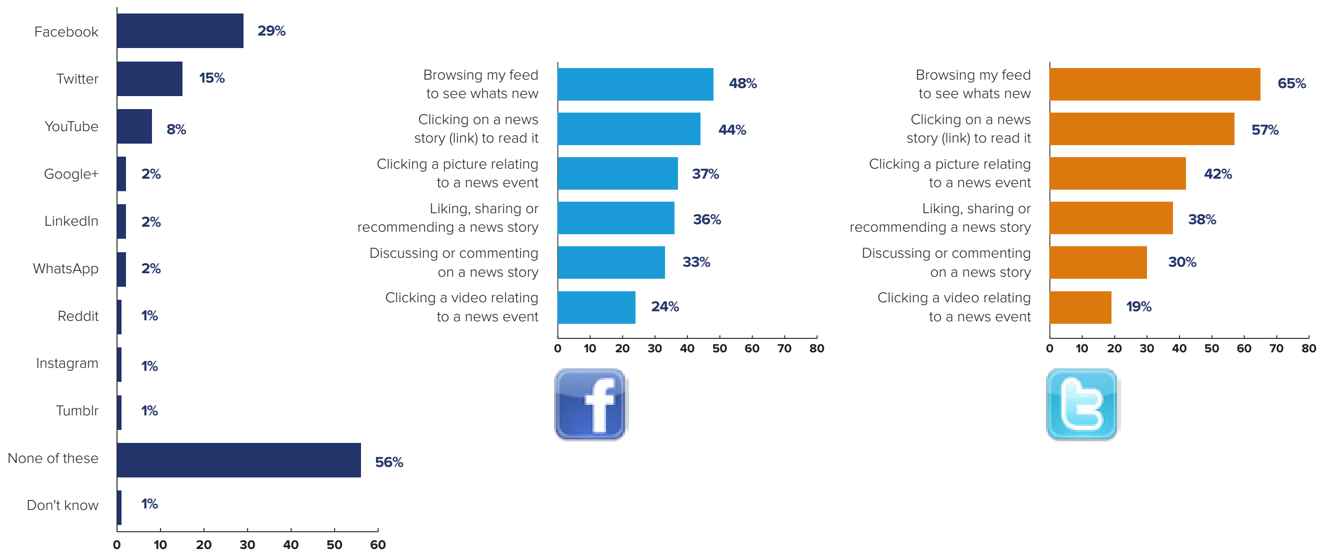
In the UK, we were able to ask Facebook and Twitter users more detailed information about how they accessed and participated with the news. In general, we find that Twitter users are more active than Facebook users – across a range of functions from browsing news feeds to discussing stories or sharing links. Twitter users are significantly more likely to check what's new (65% vs 48%) or click and read a news story (57% vs 44%). Facebook users are slightly more likely to comment on a news story (33 vs 30%) and watch a news video (24% vs 19%).

News Lovers (heavy and frequent news users) are far more likely to use Twitter whereas a significant percentage of those accessing Facebook for news can be found in our Casual Users segment (low interest and frequency). This supports other research, which suggests Twitter users tend to go actively looking for news, whereas Facebook users tend to come across news as part of their browsing activity.

These themes are developed further in two essays about the use of social media in breaking news and a study of Twitter consumption around two stories (the Oscars and a political speech).

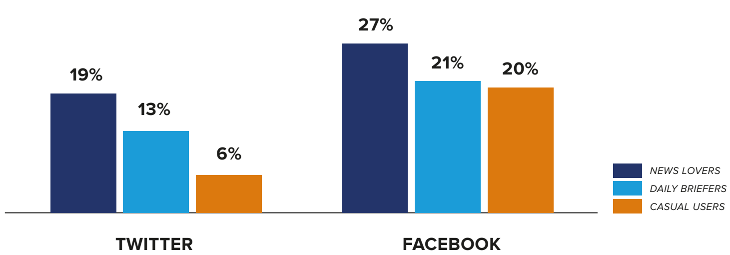
See Essays: Alison Preston, Gateways and Journeys to the News, p. 83; Shaun Austin, How News and Stories are Followed on Twitter, p. 87.

HOW FACEBOOK AND TWITTER ARE USED FOR NEWS – UK



Q12c. You say you use Twitter for news. How have you used it in the last week?
Q12d. You say you use Facebook for news. How have you used it in the last week?
Base: all who used social media in past week (1565), all who used Twitter for news (237), Facebook for news (440)

TWITTER'S AFFINITY WITH NEWS LOVERS – UK



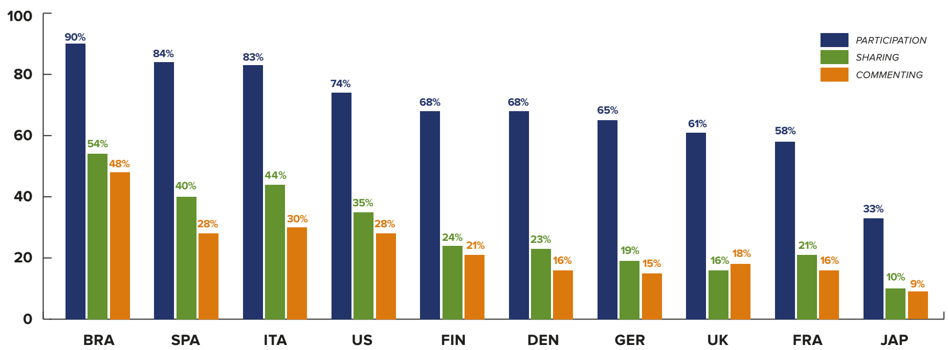
Q12a/b. Which, if any, of the following have you used for news in the last week?
Base: UK News Lovers=410, Daily Briefers=1077, Casual Users=595

/// 4.5 PARTICIPATION AND ENGAGEMENT ONLINE

Over the past three years we have been tracking a range of participation metrics around online news. The next two figures show the overall percentage of respondents who interacted with news in one of 12 different ways.

Here, we see different participatory cultures at play. Latin and Mediterranean countries actively engage far more often and in a greater range of ways. Northern Europeans tend to be more reserved while Japanese respondents are even less likely to share or comment directly on news online.

KEY NEWS PARTICIPATION INDICATORS BY COUNTRY



Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage?

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, USA=2197, Urban Brazil=1015, Japan=1973
Participation = % doing at least one of 12 types of news activity

Splitting this down further we can see this national effect clearly for each of our 12 participation types.

TYPES OF NEWS PARTICIPATION BY COUNTRY

	US	UK	GER	FRA	DEN	FIN	SPA	ITA	BRA	JAP
SHARE VIA SN	**22%**	**12%**	13%	11%	17%	20%	30%	35%	42%	8%
SHARE VIA EMAIL	**20%**	**6%**	8%	13%	7%	6%	18%	16%	24%	3%
RATE OR LIKE STORY	**15%**	**8%**	17%	10%	17%	13%	25%	31%	22%	6%
COMMENT IN SN	**21%**	**13%**	11%	11%	14%	16%	25%	23%	39%	6%
COMMENT ON NEWS WEBSITE	**14%**	**7%**	8%	7%	5%	8%	7%	13%	19%	3%
WRITE NEWS BLOG	**3%**	**1%**	2%	2%	1%	1%	3%	6%	6%	3%
POST PICTURE TO SN	**10%**	**5%**	6%	6%	6%	8%	11%	11%	17%	2%
POST PICTURE TO NEWS SITES	**4%**	**2%**	3%	3%	2%	1%	5%	6%	7%	2%
ONLINE VOTE	**25%**	**11%**	16%	11%	17%	17%	16%	24%	22%	4%
CAMPAIGN ONLINE	**5%**	**5%**	4%	5%	3%	3%	6%	6%	8%	2%
TALK FRIENDS ONLINE	**29%**	**16%**	13%	15%	8%	17%	24%	19%	33%	7%
TALK ABOUT NEWS FACE TO FACE	**44%**	**39%**	41%	30%	51%	46%	48%	40%	44%	14%

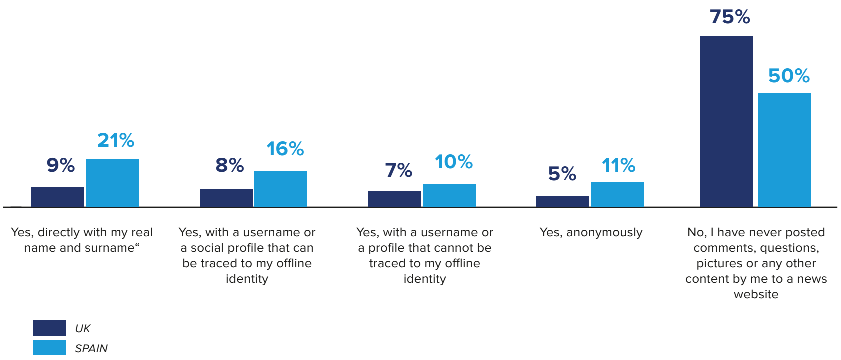
Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage?
Base: All markets 2014 – UK: 2082; Germany: 2063; Spain: 2017; Italy: 2010; France: 1946; Denmark: 2036; Finland: 1520; USA: 2197; Urban Brazil: 1015; Japan: 1973

Although the UK and US have the same language and similar levels of internet access, Americans are twice as likely to participate online – to like, share, recommend, and to post pictures, videos, or comments. There is a similar willingness to talk about news to friends offline so this may be explained by different attitudes to privacy and transparency.

British people seem more reluctant to expose their views and opinions openly and this hypothesis is backed up by a question we asked in the UK and Spain about posting to news websites. British commenters were more reluctant to use real names and more likely to post anonymously when compared with their Spanish counterparts.

For news providers, engagement and participation are becoming central to the news business. For some, like Buzzfeed, notions of virality define success, while for others participation helps drive better editorial content and brand loyalty. As competition intensifies, the focus will inevitably switch from simple measures of reach and frequency to a more nuanced picture where meaningful engagement becomes the key factor.

POSTING TO A NEWS WEBSITE IN THE LAST YEAR: UK VS SPAIN



Online commenting is driven by **young men** – 47% of 21-24 year old males in the UK and and 75% of 25-34 year old males in Spain have posted to a news website in the last year

Q13c. During the last year, have you posted a comment, question, picture or other content to a news website? (Please select all that apply.)

Base: UK=2082, Spain=2017

ESSAYS

Section 5 **Essays**

OBJECTIVITY AND IMPARTIALITY FOR DIGITAL NEWS CONSUMERS

Richard Sambrook
Professor of Journalism and Director of Centre for Journalism Studies at Cardiff University

Are the traditional journalistic disciplines of objectivity and impartiality relevant or wanted in a digital news environment? Many practitioners and commentators argue that they are not – that editorial approaches suited to the middle of the last century, with a scarcity of bandwidth and in an age of media concentration, are now redundant in the digital age of plenty.

Broadcasters in many countries have been regulated to deliver impartial news. Print journalism has never been regulated in the same way, but the professional codes, standards, and norms of journalism, which developed in the early 20th century, delivered similar standards in the news pages for many decades. However, in the 21st century, much has changed.

As the American software entrepreneur, Marc Andreessen,[9] recently argued:

> *The practice of gathering all sides of an issue, and keeping an editorial voice out of it is still relevant for some, but the broad journalism opportunity includes many variations of subjectivity... the objective approach is only one way to tell stories and get at truth. Many stories don't have 'two sides.' Indeed, presenting an event or an issue with a point of view can have even more impact, and reach an audience otherwise left out of the conversation.*

Andreessen is reflecting the popular growth in online opinion, advocacy, or activist news and 'news with attitude' in services like Vice, Buzzfeed, and numerous YouTube channels.

But advocacy, of course, is very different from objective newsgathering. What might have been left out to strengthen a case? What evidence is there to support a subjective view? Can we believe everything we read?

> **'A biased source is just that, and cannot be relied upon to be accurate.'**
>
> **Male Respondent 45–54**
> VERBATIM COMMENTS FROM UK ONLY

Who and what we trust in the digital world, awash with information and opinion, is an important issue. It's not a new problem. The English poet John Milton, arguing against the licensing of pamphlets in the 17th century, believed market forces would drive out falsehoods: 'Who ever knew Truth put to the worse, in a free and open encounter?' he wrote (in *Areopagitica*).

However, some believe in today's environment the truth can be outnumbered in an unfair fight. *Wall Street Journal* columnist, Peggy Noonan, commenting on conspiracy theorists after President Obama announced the death of Osama Bin Laden, wrote: 'Here is the fact of the age: People believe nothing. They think everything is spin and lies. The minute a government says A is true, half the people on Earth know A is a lie. And when people believe nothing, as we know, they will believe anything' (*Wall St Journal*, 11 May 2011).

As journalism reinvents itself in the digital age, the issue of trust – and brand – is crucial. Can a new trusted brand be built from the ground up (as Pierre Omidyar and Glenn Greenwald

9 Marc Andreessen, The Future of the News Business: http://a16z.com/2014/02/25/future-of-news-business.

are trying to do with First Look Media)? Can old trusted brands like Reuters or the *New York Times* successfully reinvent themselves for a new generation and stay true to the values that they were built upon a hundred years ago?

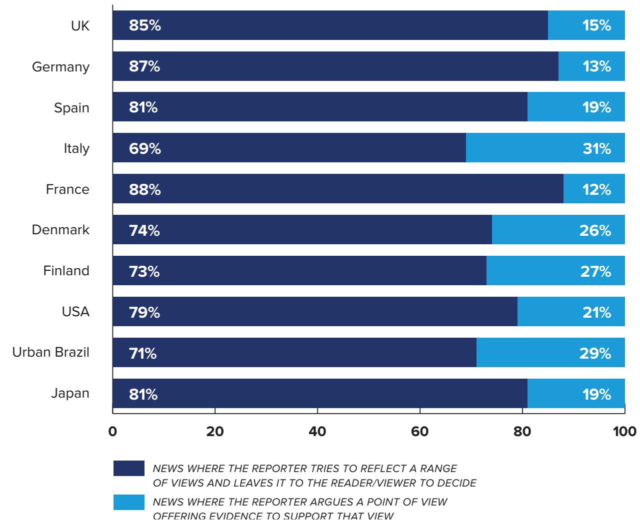
Or, as Clay Shirky, Emily Bell, and C. W. Anderson argued in their Tow Center paper, 'Post Industrial Journalism',[10] is the individual journalist rising above the organisation as the key driver of trust, engagement, and consumer loyalty?

This year's research offers some important insight into these questions.

First, the consumer appears to be more keen on traditional approaches to trusted journalism than many commentators.

Among those surveyed there was strong support for the idea that a reporter should present a range of views and allow the consumer to decide what to think about them. This suggests that diversity of opinion, a key element in the old approach to impartial news, is still valued.

PREFERENCE FOR NEUTRAL OR PARTIAL NEWS – ALL COUNTRIES



Q5c. Thinking about the different kinds of news available to you, do you prefer...?

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, USA=2197, Urban Brazil=1015, Japan=1973

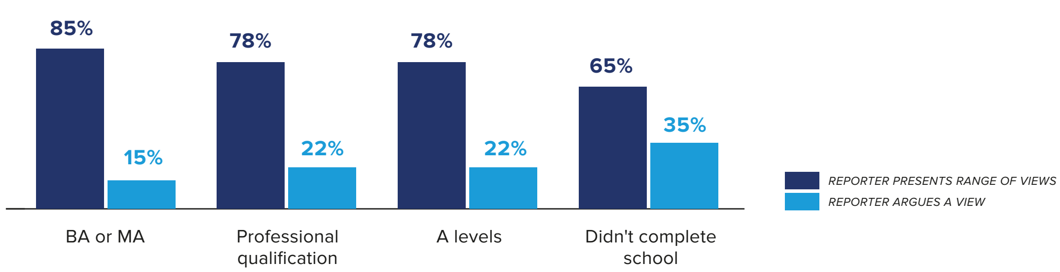
> **'I want the full range of facts to work with, not just the select few that someone else decides I should know.'**
>
> **Male Respondent 45–54**

There are some cultural differences: the UK and Germany seem particularly keen on this approach, Italy and urban Brazil the least keen with close to a third preferring a reporter to argue a particular point of view.

It is clear also that education and economic prosperity play a role as well – with this survey confirming previous studies which show that those with higher education, and higher incomes, prefer to make up their own minds about issues rather than have a single point of view given to them.

Ofcom research in the UK has shown nearly double the interest in news from those categorised as in the higher AB demographic group than C2s or DEs. Pew research in the US shows nearly twice the level of knowledge about news and current events among college graduates compared to other groups (Ofcom, *New News*, *Future News* (2007); Pew, *What Americans Know* 2007).

IMPACT OF EDUCATION – GLOBAL



Q5c. Thinking about the different kinds of news available to you, do you prefer:

Base: All markets = 18858

[10] Tow Center, 'Post Industrial Journalism', Nov. 2012: http://towcenter.org/wp-content/uploads/2012/11/TOWCenter-Post_Industrial_Journalism.pdf.

The same holds true for brands, with most countries preferring sources of news that try to be neutral over those with clear bias.

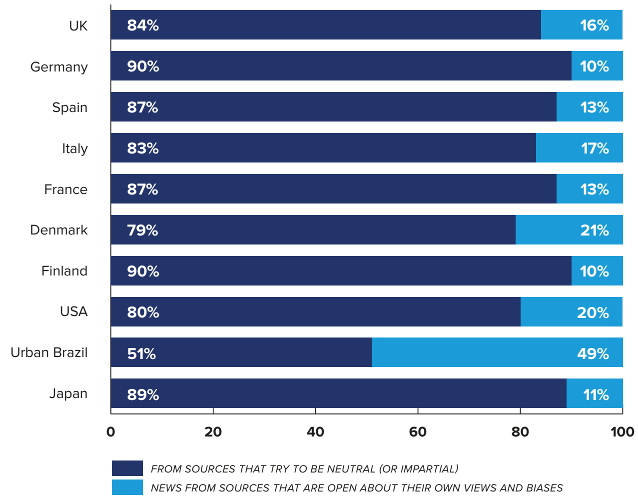
Again urban Brazil is an exception with an even split – and they also have a clear view that brand is important to trusting the news. So even if they are not keen on the traditional editorial drivers of trust – objectivity and impartiality – their choice of brand determines what they trust.

'I object strongly to newspaper proprietors trying to manipulate public opinion for their own political ends by requiring their staff to adopt given lines.'

Male Respondent 55+

The figures also support those who argue for the rise in importance of the individual journalist over the brand. In the US more than half those surveyed said it was the individual reporter they trusted. In an age of social media and declining deference, it seems individuals may offer more credibility than institutions.

TRUST IN SOURCES THAT TRY TO BE NEUTRAL – ALL COUNTRIES



Q5d. Thinking about the different sources of news available to you (such as a newspaper, broadcaster or online news source), which do you trust (or believe) most:

Base: All markets 2014 – UK=2082, Germany=2063, Spain=2017, Italy=2010, France=1946, Denmark=2036, Finland=1520, USA=2197, Urban Brazil=1015, Japan=1973

53%
say the reporter is an important factor in developing trust

US sample

See Figure on p. 16 in Executive Summary for full data on the role of brand and reporters in developing trust

There may be a number of factors at work here. First, homophily – or the echo-chamber effect. Do consumers simply prefer, and therefore trust, news brands which accord with their personal views? In the US, Fox News has regularly come top of the most trusted cable news networks – while this year simultaneously, in the same survey, being the least trusted (with about a third of those surveyed opting for one polarised position or the other).[11] Fox News, of course, has a clear right-wing agenda which viewers seem to either love and trust – or hate and distrust.

But if viewers trust those brands which simply accord with their own views and prejudices, are they necessarily well informed? Perhaps not. Again surveys in the US suggest Fox News viewers to be the least well-informed among cable viewers.[12]

This indicates that there might be real risks to public understanding from the growth of subjective or advocacy news without an underpinning of more objective information.

Secondly, if there is a significant level of distrust (e.g. 50%) of some types of news sources it may be a straightforward barometer of opinion – or it may be that public expectations of quality and trust run ahead of performance and those news sources are effectively being 'marked down' due to public disappointment in them. We have been through a period in the UK where the media's performance and standards have undergone intense criticism – with the Leveson Inquiry into the UK's tabloid press and successive editorial crises in the BBC, the UK's dominant public broadcaster.

'I would trust a source that tries to be neutral or impartial because I believe you get a better more balanced view'

Female Respondent 45–54

Finally, the solid support for objective news may reflect a public who do not yet recognise the arguments about the changing media ecology and offer answers simply reflecting what they have traditionally believed news organisations should represent. Plus there could be an attitude–behaviour gap between what people say they want from a news service, and what they choose to consume.

Questions of who you trust, and why, are complex. Greater qualitative research into the attitudes underlying these figures is needed to fully understand the dynamics of trust in a digital news environment, but cultural, educational, and economic factors clearly influence consumer choices.

[11] http://www.publicpolicypolling.com/main/2014/01/fox-news-once-again-most-and-least-trusted-name-in-news.html.

[12] http://publicmind.fdu.edu/2012/confirmed.

If you are British or German you will have a stated preference for more traditional approaches to news. If you are Italian or Brazilian, you may prefer subjective news.

If you have a university degree and a good income you will prefer to have evidence set out for you to make up your own mind. If you are less well-educated or less well-off you may prefer a journalist to interpret the news for you.

> **'If you know what angle they're taking, you can interpret/understand their news accordingly. If they're trying to please everyone, they're appealing to no-one. Being middle of the road is never inspiring.'**
>
> **Male respondent 35–44**

Some commentators suggest that 'Transparency is the new Objectivity'.[13] In other words, if a news organisation or a journalist is open about their biases or personal views then the consumer can take them into account and trust the source as a consequence. This research suggests there is still an appetite for diversity of views and for evidence on which to base opinion – in other words, transparency alone is not enough.

Although the news landscape is changing rapidly with exponential growth in the sources, styles, and types of news available, audiences appear more attached to the traditional norms of balanced and impartial news than some might suppose. The question going forward is how well that sits among the growing range of digital services seeking to establish themselves by adopting a point of view to maximise impact.

[13] David Weinberger technologist and co-author of the Cluetrain Manifesto: http://www.hyperorg.com/blogger/2009/07/19/transparency-is-the-new-objectivity.

NEW APPROACHES TO PAID DIGITAL CONTENT

Professor Robert G. Picard
Director of Research, Reuters Institute

There is a growing impetus toward paid digital content in print news providers. Many newspapers are now starting to follow early movers into paid services, with the *Sun* and *Telegraph* in UK following the path of the *Financial Times* and *Times*. In Germany, *Bild* became the first large-scale tabloid to require payment, and the majority of large dailies in Canada and Australia now require payments for digital access. News and public affairs magazines are taking a mixed approach, with some pursuing paid strategies and others trying more open ones. News organisations that employ collaborative, networked strategies relying on significant contributions from experts and the public are tending to pursue open or mixed-access approaches.

These differing approaches are representative of distinctive shifts in thinking about digital strategies and a growing sophistication of strategy involving news content.

New strategies for paid content

Four major strategic approaches to the question whether or not consumers should pay have emerged: (1) open sites for which consumers do not pay for access (although many sites have been free for the past two decades, the movement towards paid content is changing this from a default strategy to a deliberate choice designed to serve specific strategic functions), (2) a mixed approach, with some content available without payment and some paid, (3) a soft paywall requiring paid access, but with ability to share stories and limited access for search engines and links, and (4) a hard paywall necessitating paid access but without the ability to share and denial of access for search engines and linkages.

The questions of which approach to use are multifaceted and differential access pricing models are proliferating. Underlying this trend is increasing acceptance of view that the digital platforms provide different value and need to be conceived as different products. Differences in visual and presentational styles, storytelling, and experience are producing varying pay approaches as consumers show a greater willingness to pay for tablet and smartphone news content.

BILDplus, for example, offers three different price packages providing access via web, smartphone, and tablet apps for €4.99 monthly, web, smartphone, tablet apps, and epaper editions for €9.99 monthly, and BILDplus Komplett for €14.99 monthly that includes web, smartphone, tablet apps, epaper editions, and the printed paper.

Elsewhere, digital channels are also being used to offer special content apps and editions. In Spain, *El Mundo* has introduced an evening app edition and a daily gossip app. *O Globo* and *O Estado de S. Paulo* in Brazil have also created special new evening products for tablets and mobiles.

A major emerging strategy is the acquisition of video rights to help drive acceptance of paid tablet and smartphone services. The general press are producing more distinctive video content using their own journalists as well as offering news clips, while tabloids have focused their attention on sports and soap opera highlights.

The *Sun* in the UK reportedly paid £20 million for Premier League football highlights, and recently completed deals for Scottish Premier League highlights and Champions League and Europa League highlights beginning in 2015 for its Sun+ bundle. BILDplus in Germany offers a 'BUNDESLIGA bei BILD' subscription in addition to its basic digital bundles that attracted 150,000 subscribers in 2013. The emphasis on sports rights at the Sun+ has now skewed subscribers' gender so that 60% of digital subscribers are male; it may be necessary to obtain video equally attractive to female users in the future.

It is not unusual for publishers to offer some free digital content, basic paid news access to additional material by single access or subscription payment, and premium paid access to specialised news, tools, and personalised news and analysis services. In Italy, Repubblica.it and Corriere.it remain free on the desktop/laptop version, but charge a fee for access through mobile devices. *La Stampa* is experimenting with premium models and the *Il Sole 24 Ore* business newspaper has introduced a metered paywall.

Membership and community

A related alternative to subscription is the membership model, which is being pursued by news providers whose users have strong psychological links to the organisation. Readers of the *Guardian* in the UK, for example, are less interested in subscriptions for general web access, but more interested in memberships because of their connotations of community and association. Consequently it is exploring revenue streams based on membership and live experiences, and close engagement with readers on all platforms. *Il Fatto Quotidiano* in Italy is also experimenting with a membership model.

An emerging phenomenon is bundling news access with other products, including digital news access with subscriptions to internet service providers and companies providing broadband phone, internet, and pay television services and as a benefit for acquiring premium credit cards.

Push for digital revenues

Perhaps the most significant strategic change involving payment has been rejection of the view that digital media are just more platforms on which to move print content. Today, they are being seen as separate business opportunities, requiring independent business strategies, and separate content strategies.

Companies seeking to focus their strategies are increasingly turning to big data. They are no longer satisfied with basic data on paid users, unique visitors, and what stories are read or shared most, but are seeking better metrics and understanding of individual users' engagement and use patterns across digital platforms. The strategic impetus for this is to improve content provided to users at different times on multiple platforms as well as to drive engagement and loyalty at a time of increased competition.

Driving this interest is the recognition that a significant group of people are now regularly paying for news in all countries – as evidenced by the data in this report.

PAYING FOR NEWS AND FUTURE WILLINGNESS TO PAY – BY COUNTRY

	US	UK	GER	FRA	DEN	FIN	SPA	ITA	BRA	JAP
PAYMENT 2014	11%	7%	8%	12%	10%	14%	8%	13%	22%	8%
LIKELY TO PAY IN THE FUTURE	11%	7%	15%	10%	11%	11%	21%	23%	61%	8%

Q7. Have you paid for ONLINE news content in the last year/ Q7aii. You said you have not paid for online digital content in the last year. How likely would you be to pay IN THE FUTURE for online news from particular sources that you like?

Base: All/all who don't pay – UK=2082/1925, Germany=2063/1855, Spain=2017/1814, Italy=2010/1697, France=1946/1872, Denmark=2036/1796, Finland=1520/1272, USA=2197/1904, Urban Brazil=1015/757, Japan=1973/1774

METHODS OF PAYMENT FOR ONLINE NEWS – BY COUNTRY

	US	UK	GER	FRA	DEN	FIN	SPA	ITA	BRA	JAP
ONE OFF PAYMENT PDF DAY PASS ETC	19%	22%	27%	31%	14%	24%	**41%**	34%	23%	33%
ONE OFF PAYMENT APP/NEWSSTAND	10%	15%	24%	28%	6%	16%	**26%**	30%	20%	29%
DIGITAL SUBSCRIPTION	40%	47%	33%	31%	42%	**26%**	27%	35%	31%	43%
PRINT AND DIGITAL BUNDLE	23%	16%	12%	12%	31%	**29%**	17%	13%	15%	18%

Q7ai. You said you have accessed paid for ONLINE news content in the last year. Which, if any, of the following types of payment have you used to pay for ONLINE news content in the last year? (Please tick all that apply)

Base: All who have paid to access online news in the past year – UK=139, Germany=173, US=238, Japan=153, Urban Brazil=233, Italy=267, Denmark=206, Spain=173, Finland=220

The subscription model is proving highly attractive to consumers because one-time payments make future access simpler. The majority now make ongoing payments in the form of digital subscriptions. There are two exceptions to this: Spain where more people are making one-off payments and Finland where there are more people paying for print and digital bundles. The Spain pattern may be due to the fact that digital newsstands have created the opportunity to download electronic versions of the paper at around 11pm the night before and some paid web-only news organisations have now started to make content available even earlier.

It is becoming clear that several factors provide important reasons for users to subscribe and remain subscribers. The most important for getting initial subscriptions seems to be a combination of being able to get access any time on any platform and the fear of not being able to access content that they like. Keeping subscribers is more about the actual experience of the content, the writers, and the range of content that they receive.

All of this suggests that it is a core group of users who want to use and are willing to pay for a variety of news services on digital platforms. This is good news for news providers, but they will have to spend greater effort understanding and serving their individual needs than they ever had to in print.

The growing range of business models in digital news provision suggests the industry will be much more segmented than in the past. It is likely there will be a mass-market tier of providers based on free and premium content, as well as a more niche group creating high value for smaller groups of well-paying subscribers. Other providers will position themselves between the two, offering multiple bundles of content at various price points to serve different user groups. This process, of course, is providing users with greater choice in the type and range of content they receive and inducing news providers to provide more focused products rather than the ‘something for everyone’ model that was required by print.

GATEWAYS AND JOURNEYS TO THE NEWS: UK CASE STUDY

Alison Preston
Head of Media Literacy Research at Ofcom

This essay examines in detail how online news users in the UK get breaking news, and further analysis on a fast-moving story. We asked a series of questions about which platforms they would go to for these types of news and about how they use social media, search engines, and news websites, in order to better understand the news 'journeys' that people make to get to the news content they are seeking.

This analysis helps us understand how the online news environment is being negotiated by users. To what extent are they driven by brand or simply want the most convenient access to the news event or issue; to what extent are they seeking professional or 'amateur' voices (e.g. friends, eyewitnesses, other non-specialist commentators)? How do people find the relevant news information once on the social media or search engine site, and do they pay attention to the types of site they end up on? And, importantly, what are the demographic differences between age groups in particular, which can give us indications of the likely future direction of travel of such habits?

These questions are of importance to policy-makers and practitioners. The landscape of news provision and consumption is changing rapidly. While traditional brands such as the BBC in particular endure in the UK, it is nonetheless the case that the rapid growth of social media as a means of news consumption has a range of possible ramifications. One is that, while choice proliferates, actual consumption may narrow: people may stay within a limited range of sources, selected via means that involve the tastes of their peers rather than a more societally connected, broader news agenda. Another is that people may pay less attention to the provenance of their news source, as long as it provides what appears to be the latest information on a topic. A third is that the ways of reading news may change, which may impact upon the extent of content encountered by serendipity or chance. While scrolling through a feed is currently the main way of getting content on a social media site, other means, such as finding a hashtag which pulls together the best information, may become increasingly popular.

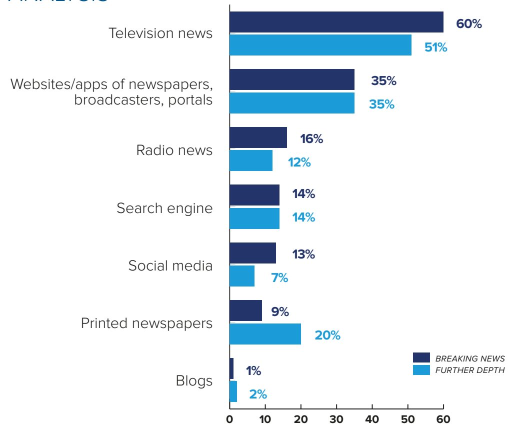
TV continues to be the most popular platform for breaking news – but this masks considerable differences by age group

We asked our online news sample where they would go for the latest information about a breaking news story, and where they would go for analysis or further depth on such a story. We wanted to see the extent of difference in the use of news sources, and the relative importance of different platforms.

For a breaking news story, participants are most likely to use TV (60%), then websites or apps (35%), then radio (16%), then search engines (14%), then social media (13%), with printed newspapers at 9% for obvious reasons.

The picture is broadly similar for analysis or further depth – TV is most-used (51%), then websites or apps (35%). However, newspapers are far more likely to be used for this purpose, with one in five (20%) of online news users saying they use them.

WHERE PEOPLE GO FOR BREAKING NEWS AND IN DEPTH ANALYSIS



Q10a/b. Where do you tend to go for the VERY LATEST information/ANALYSIS or FURTHER DEPTH on a fast-moving news story? (e.g. an earthquake, major riot or political crisis) Please select all that apply

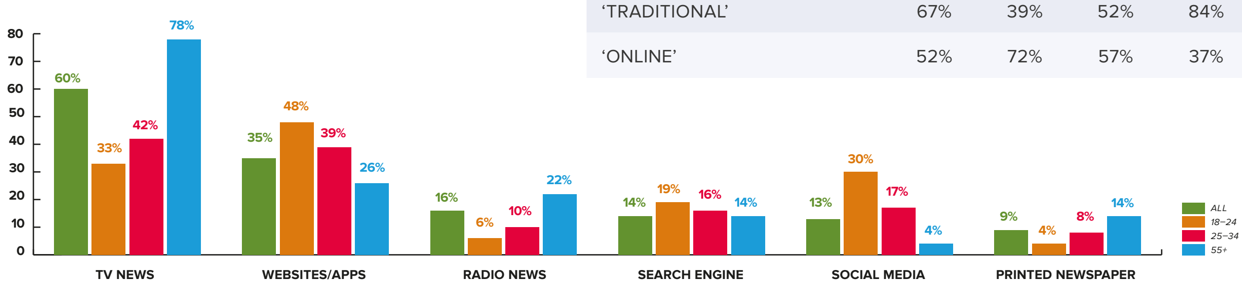
Base: UK 2082

Thus television remains considerably ahead of other platforms for both initial reporting of a news event, and then further information and explanation, when the overall UK sample is considered. However, this pattern belies considerable differences by age group.

When traditional and online forms are aggregated, the distinction between age groups is stark and in mirror image – for both types of news, young people aged 18–24 are twice as likely to use online as traditional sources while for people aged 55+ it is the reverse.

NEWS SOURCES FOR BREAKING NEWS, BY AGE

TYPE OF NEWS SOURCE	ALL	18–24	25–34	55+
'TRADITIONAL'	67%	39%	52%	84%
'ONLINE'	52%	72%	57%	37%

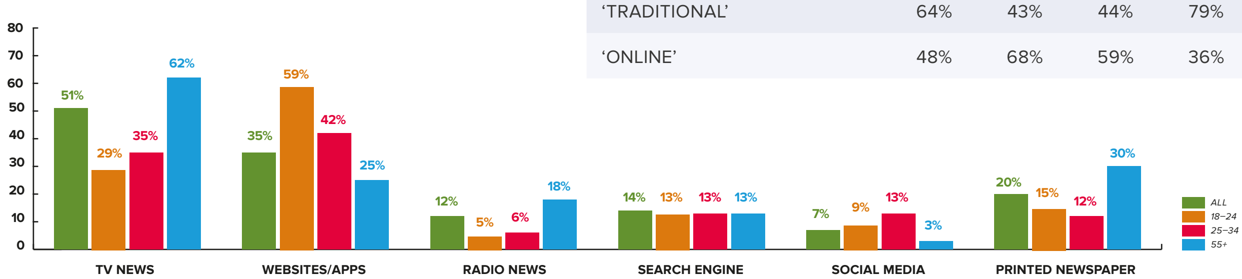


Q10a. Where do you tend to go for the VERY LATEST information on a fast-moving news story? (e.g. an earthquake, major riot or political crisis) (Please select all that apply)

Base: UK 2082

NEWS SOURCES FOR FURTHER DEPTH

TYPE OF NEWS SOURCE	ALL	18–24	25–34	55+
'TRADITIONAL'	64%	43%	44%	79%
'ONLINE'	48%	68%	59%	36%



Q10b. Where do you tend to go for ANALYSIS or FURTHER DEPTH on a fast moving news story? (e.g. an earthquake, major riot or political crisis) (Please select all that apply

Base: UK 2082

The BBC is the most popular online brand for a fast-moving news story by a significant margin

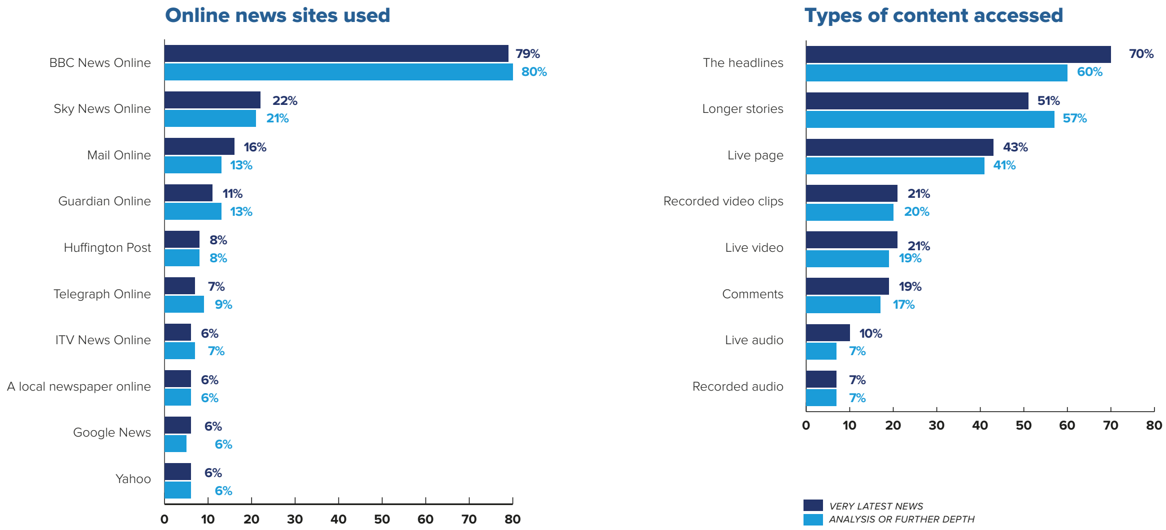
We wanted to understand which online news brands were used for breaking news and for in-depth analysis, and in particular to find out what differences there are between the two types of news.

There is very little stated distinction between the two types of news. The BBC is most popular by a significant margin – 80% of those that use websites for these kinds of news say this is a source. The next most popular source overall is Sky News (21%), although for breaking news, those aged 18–24 are less likely to nominate it as a source (10%), and more likely to nominate the Mail Online (18%). This source is relatively popular both among younger age groups – 18–34 – and older age groups – 55+.

The majority of participants say they use these branded sites for headlines (69%) and also for longer stories (51%) when accessing for breaking news. They are equally likely to use these two categories for depth analysis (60% and 57%). Live pages are likely to be used by four in ten for fast-moving news stories – a considerable difference to their use in a general news situation (8%), as seen in section 4.2.

As seen elsewhere in this report, the preference for text-based information online remains, with little sign of younger people preferring video over text.

WHICH ONLINE NEWS BRANDS ARE USED, AND HOW THEY ARE USED



Q10hI/2. You said that you use a particular NEWS WEBSITE OR APP to get the LATEST information/DEPTH AND ANALYSIS .Which of the following sites do you access?
Q10iI/2. You said that you use a particular NEWS WEBSITE OR APP to get the LATEST information/DEPTH AND ANALYSIS. Which types of content do you access?
Base: All who use a particular news website or app for latest news=761, all who use a particular news website or app for depth and analysis=769

Three-quarters of search engine users choose sites they know and trust

As stated earlier, 14% of online news users nominate search engines as a news source both for breaking and in-depth news. This rises to 19% of 18–24s.

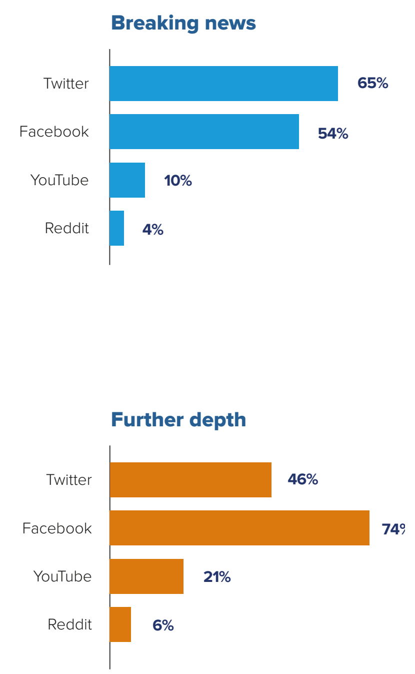
The majority of this group say they use search engines to access information about the news event itself, rather than as a means to get to a particular news site. For breaking news, 57% of search engine users say they enter one or two keywords related to the story, and 49% say they use a search engine like Google news that pulls together news from different sources. In contrast, only one quarter (26%) said they entered the name of a news site. The figures are almost identical for depth analysis of news.

Once people have a list of news sources on their results page, which do they click on? To what extent do they pay heed to the brand that has provided the news? Three-quarters of this sample say they click onto sites that they trust (74% for both breaking news and depth analysis), while one in four say they don't notice the brand, but just use the source that looks the most relevant (21% for breaking news and 25% for depth analysis). Those in ABC1 socio-economic groups are more likely to make an explicit choice to go to sites they trust for breaking news (79% of ABC1s vs 66% of C2DEs).

Social media news consumption involves using professional and 'amateur' sources in broadly equal measure

As noted above, while social media are used by a relatively small number of online news users for breaking news (13%), this rises to 30% of 18–24s saying they use them for this purpose. We examined these social media users in more detail, to understand which sources they used and how they used them.

WHICH SOCIAL MEDIA SITES ARE USED IN A FAST MOVING NEWS SCENARIO



Q10c/i. You said that you use social media to get the VERY LATEST/ ANALYSIS AND FURTHER DEPTH, which, if any, of the following social media sites would you use?
Base: All who use social media for latest news=254, all who use social media for depth and analysis=122

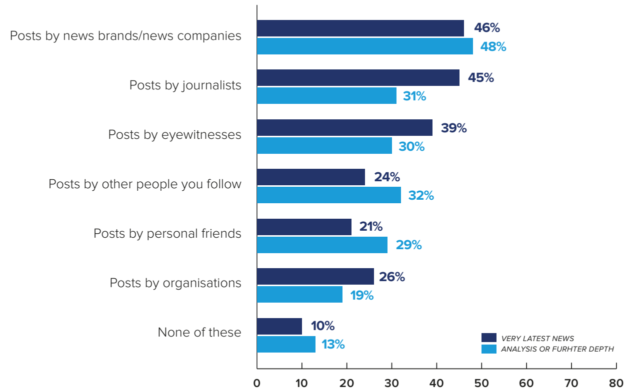
Of those that use social media for breaking news, six in ten (58%) use the relatively passive technique of scrolling through their feed for the relevant information they are seeking. Four in ten (39%) say they search via keywords, and a similar proportion say they find and follow a relevant hashtag (39%). One in four (27%) says they follow someone who is an expert on the story. Habits relating to further analysis show very similar results.

Social media comprise very different levels and types of news content, from traditional news brands to personal friends' discussion. We asked which types of voice on social media they tend to pay most attention to – to what extent are professional or amateur voices sought?

For breaking news, nearly half of respondents (46%) say that they pay attention to posts by news brands/companies, and a similar proportion (45%) that they use posts by journalists – indicating that the individual journalist is as popular as the news brand in this area. Four in ten (39%) use posts by eyewitnesses. One in five (21%) says they use posts by personal friends. At a net level, some three-quarters (77%) use professional sources and 65% 'amateur sources' such as posts by eyewitnesses, friends, and other people.

In terms of more in-depth analysis, people are less likely to turn to posts by eyewitnesses, which is understandable given the need for a different kind of information, but perhaps surprisingly are also less likely to turn to posts by journalists (31% vs 45% for breaking news).

WHICH SOCIAL MEDIA POSTS ARE GIVEN MOST ATTENTION?



Q10e/i. You said that you use social media to get the VERY LATEST/ ANALYSIS AND FURTHER DEPTH, which sources do you pay most attention to? (Choose up to THREE).

Base: All who use social media for latest news=254; all who use social media for depth and analysis=222

Summary

This short essay has set out the ways that people say they are accessing different forms of news, and which types of content and sources they pay attention to.

While TV news remains a dominant source of news at an overall level, this is not the case for younger age groups, where online sources are most used. However, the BBC brand for online news is very popular, across all age groups. One quarter of search engine users say they don't really notice which news brands they are clicking on. It will be interesting to see whether this response grows over time.

Among users of social media for news, browsing is the main means for finding out information, and there is a broadly equal distribution between professional and amateur voices for both types of news. This balance between official and unofficial voices is important to track, to see whether the inherently social or user-generated dimension of this platform becomes less important, and its ability to operate as a convenient aggregator of branded and professional content develops.

HOW NEWS AND STORIES ARE FOLLOWED ON TWITTER

Shaun Austin
Director, Media Research, YouGov

In recent years, Twitter has started to play an increasing role in news – from being a source for journalists to providing the public with a way to comment on and interact with unfolding events.

This essay looks at the often complex relationship between Twitter, news brands, and journalists in the context of breaking news and developing stories. Using YouGov's social media analysis tool (SoMA), we first looked at the types of news accounts followed by the UK Twitter population. We then analysed two recent stories – the Oscars and a speech by Labour leader Ed Miliband outlining his party's position on an EU referendum – to see the different ways they played out on the platform.

64% of Twitter users follow a professional news account

UK sample

Overall, we found that the majority of people on Twitter follow some form of news account – be it a news brand, breaking news account, or journalist. A large number of them follow all three. Of these three types of account, journalists are the most popular, suggesting people appreciate the opportunity to get closer to those to who make and comment on the news.

We also see how some news stories develop on Twitter over a long time period, but how the interventions of key news accounts and professional journalists can help a particular story achieve critical mass.

Which accounts people follow for news

Data from the *Digital News Report* 2014 confirm the importance of Twitter as a network for finding, spreading, and discussing the news. Just under a quarter (24%) of our UK sample use Twitter each week and 12% have it as a news source, making the UK one of the biggest news markets on Twitter behind only Spain (21%). These data also show that UK Twitter users are significantly more likely to check what's new or click and read a news story than users of other social networks like Facebook (see section 4.4).

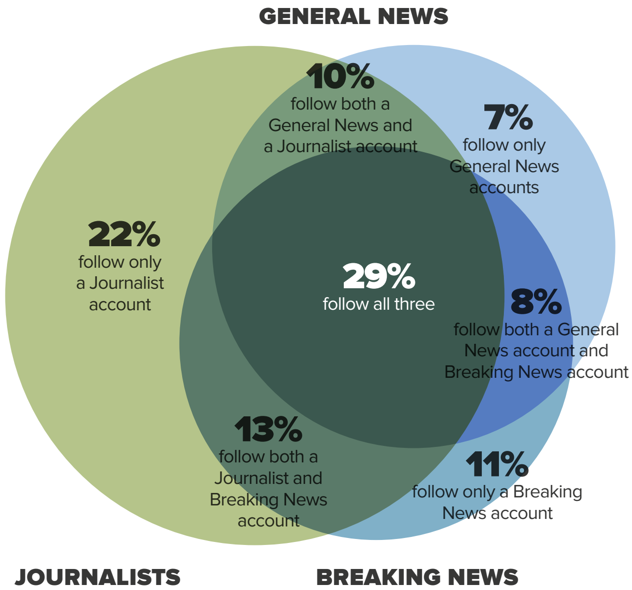
YouGov's additional analysis tracking actual usage across a representative sample of Twitter users suggests that 64% of people on Twitter in the UK (c.5.4 million) get news through one or more type of 'news account'. 2.6 million follow a journalist, 2.2 million follow at least one breaking news account, and 1.9 million follow at least one general newsbrand. Among those who follow news on Twitter we found that:

- 48% follow a journalist
- Two in five (40%) follow a breaking news account
- Just over one in three (35%) follow a general newsbrand

However, it is a complex picture with lots of bleeding between the three groups. The Venn diagram shows how the followers of different type of 'news' accounts overlap. Interestingly, the highest number on the chart is at its centre, with almost three in ten (29%) of those who follow at least one of these types of accounts actually following all three.

It is worth remembering that while all of these different types of accounts ostensibly perform different functions (breaking news feeds for events as they happen, journalists for analysis, and general news brands for promoting deeper reporting and driving engagement), the lines are often blurred. BBC Business Correspondent Robert Peston, for example, frequently uses his account to break stories as well as to promote wider coverage and engage with his followers.

UK TWITTER USERS FOLLOWING NEWS ACCOUNTS



Source: YouGov social media analysis tool (SoMA) following a representative sample of 7000 UK Twitter users

Usage monitored 26 February–11 March 2014

Given the position of journalists as both breakers and analysts of news, it is not surprising that so many people follow them. Twitter has provided a unique way for users to get closer to journalists and 48% of those following at least one type of news account (about 29% of all Twitter users) follow a journalist and one in five (22%) have a journalist as their only type of news content on the site.

It is clear from our analysis that while a lot of people follow both journalists and at least one type of news feed (either general or breaking), the demographic profile of these groups is slightly different. Twitter users overall are evenly split by gender but are skewed towards younger people than the overall UK population. While all of the groups we analysed are older than typical Twitter users, it is particularly noticeable among those who follow journalists. Additionally, journalist followers are more male while following general news brands and breaking news accounts has a much broader appeal.

Behind the averages there are significant differences when we analyse specific accounts. Most (60%) of *Times* columnist Caitlin Moran's following is female and the vast majority (70%) are aged 25–44 years old. By comparison, Jon Snow from Channel 4 News has a more male-skewed audience (58%) with a slightly older audience profile.

MOST POPULAR 'NEWS' ACCOUNTS AMONG UK TWITTER USERS

	JOURNALISTS	BREAKING NEWS	GENERAL NEWSBRANDS
1	CAITLIN MORAN	BBC BREAKING	GUARDIAN
2	JON SNOW	SKY NEWSDESK	BBC NEWS
3	VICTORIA COREN	GUARDIAN NEWS	THE ECONOMIST
4	ROBERT PESTON	CHANNEL 4 NEWS	SKY NEWS
5	NICK ROBINSON	BREAKING NEWS	BBC NEWS (WORLD)

Source: YouGov social media analysis tool (SoMA) following a representative sample of 7000 UK Twitter users

Usage monitored 26 February–11 March 2014

DEMOGRAPHIC BREAKDOWN OF NEWS FOLLOWERS IN TWITTER

		TWITTER USERS WHO FOLLOW JOURNALISTS	TWITTER USERS WHO FOLLOW BREAKING NEWS	TWITTER USERS WHO FOLLOW GENERAL NEWSBRANDS
GENDER	MALE	66%	56%	57%
	FEMALE	34%	44%	43%
AGE	18–24	7%	10%	11%
	25–34	26%	30%	31%
	35–44	27%	24%	24%
	45–54	20%	18%	17%
	55+	20%	17%	18%

Source: YouGov social media analysis tool (SoMA) following a representative sample of 7000 UK Twitter users

Usage monitored 26 February–11 March 2014

There are also important differences in the make-up of journalist and news organisations' Twitter accounts. On average, people who follow journalists follow seven journalists. Those who follow news organisations follow just three current affairs outlets and those who follow breaking news accounts follow two on average. However, there are more accounts run by journalists than by news organisations. As a result, in total we see larger followings for news accounts than journalists; for instance BBC Breaking has 9.45 million followers, the *Guardian* has 2.11 million followers, compared to just 491,000 for the most-followed journalist (Caitlin Moran) in our list. (All figures here are worldwide, not just in the UK.)

Our research also shows that, through searches and retweets from others, Twitter users are exposed to accounts and tweets in their timeline that they wouldn't normally see. Over two-thirds (68%) of people in our data have interacted with a journalist or media organisation that they don't follow, through either a reply, favourite, or retweet. As a result, the influence of journalists and news organisations is more significant than the numbers around followers suggest.

How people follow news stories

While Twitter has changed the way we access and disseminate news, almost as important is the distinct way different types of news stories play out through the medium. Our research looked at a celebrity story (2014 Oscars) and a political announcement (Labour's stance on an EU referendum) to see the way these different types of news have been followed on Twitter.

We started by looking at a representative panel of Twitter users of c.7,000 UK respondents and then also look at the timelines they follow – meaning that we analysed around 2 million tweets each day.

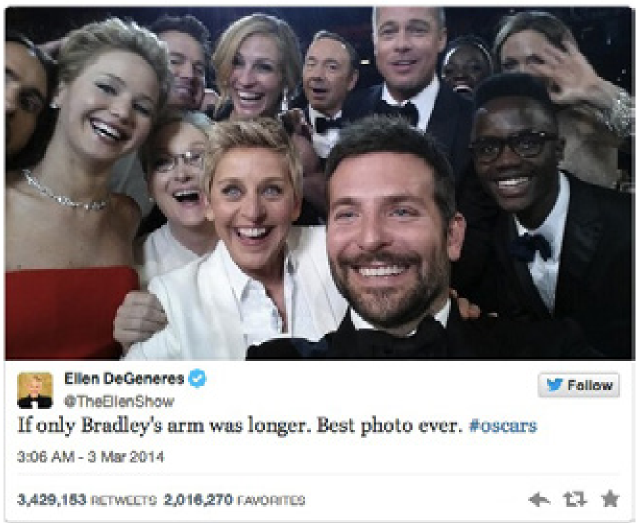
We define reach as the proportion of Twitter that has been exposed to a Tweet or had the opportunity to see a Tweet. In this case study we defined searches based on hashtags and combinations of keywords to determine what proportion of Twitter users had been exposed to each story and when. We are unable to know whether they have actually seen it or not but we know for certain it has appeared in their feed.

The Oscars

Oscar's host Ellen DeGeneres broke a Twitter record for the most retweets of a single picture and message (3.4m). But in terms of driving reach in the UK, this 'selfie' came relatively late in the day.

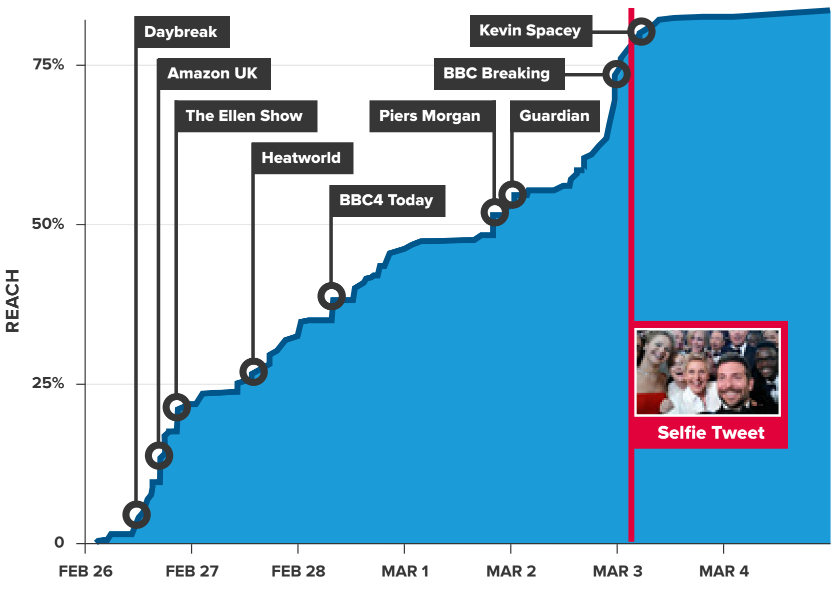
The chart below shows the cumulative reach on Twitter for those being exposed to the Oscars in the lead-up to the awards ceremony – and the accounts that drove the most additional reach to the story.

With the exception of Amazon UK (which notably promoted the films on their service), it is mainly media accounts that deal with celebrity and fashion – such as ITV's Daybreak, People Magazine, and Cosmopolitan UK – which stand out the most in the lead-up to the event.



The sharpest increase in cumulative reach for the Oscars story occurs at around midnight in the UK. DeGeneres's account does not appear at this stage because she had already talked about the awards in the lead-up to the ceremony and further tweets by her didn't increase unique any further. However, when Kevin Spacey tweeted about the picture shortly afterwards there was some further incremental reach.

HOW THE OSCARS STORY SPREAD ON TWITTER



When the actual ceremony started, a news organisation account – BBC Breaking News – posted a tweet encouraging users to follow the news of the Oscars live. Given that up to this point the majority of tweets came from entertainment journalists and celebrities, the increase in cumulative reach was relatively large due to the differing profile of people following this mainstream news organisation. By the time the event itself began at 12:30, 74% of the Twitter population of the UK had been exposed to it – with most first exposures coming from celebrity sites.

Labour and the EU

A couple of weeks after the Oscars we tracked another type of news story – Ed Miliband's speech about the European referendum – as it emerged through Twitter. As we will see, the way the story spread was different to the Academy Awards in a number of ways.

This story built up slowly through largely specialist sources including political parties. The spark came from a report by the Reuters news agency that the Labour party was preparing to change its policy on the European Union by pledging to hold a referendum if elected in 2015.[14] Interestingly the story originated in *The Times* newspaper (quoting an unnamed political source) but the news brand's influence in Twitter is limited by the use of a hard paywall.

Further discussion was generated after commentary by Labour News feed and the *New Statesman*, but for about a week the story remained niche – being talked about by a select number of political and news accounts and reaching only about a fifth of the Twitter population.

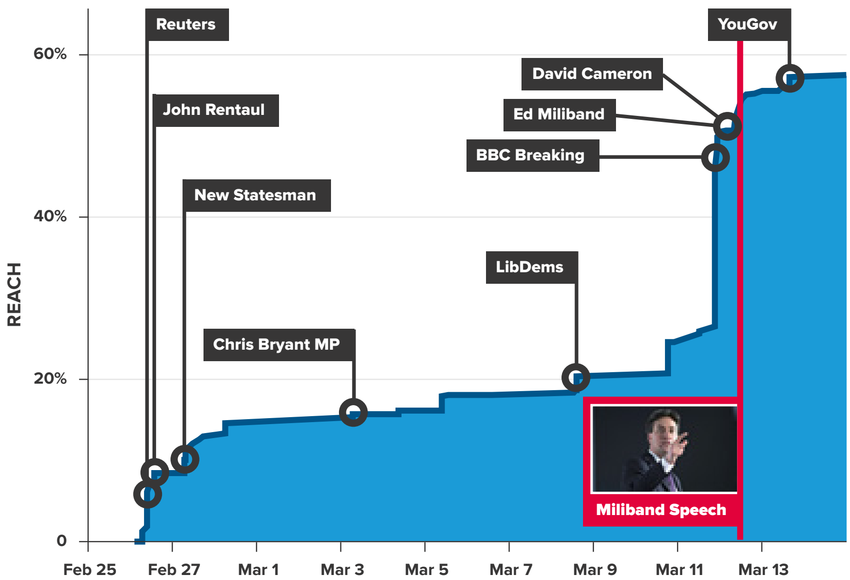
Just a few days before the speech, however, we see the impact of mainstream news brands, first from the *Guardian* and then the BBC (via the influential @BBCBreaking account). The BBC tweet increased cumulative reach by 15%.

The BBC were also the quickest to 'break' the story to new Twitter users – faster than even Ed Miliband's and David Cameron's own accounts. As a result, by the time the politicians tweeted about it they were reaching very few people for the first time, suggesting they were part of the reaction and not the news.

Major news organisations' feeds were, relatively speaking, earlier to the party than the Oscars. While BBC Breaking News was the 3,411th account to tweet about the Academy Awards it was the 381st for the Miliband story. Its exposure impact was greater as it was easier for it to cut through the clutter.

Total reach for the Miliband story was markedly lower than the Oscars. While over 80% of the UK Twitter population was exposed to the Academy Awards, Ed Miliband's EU speech reached under 60%. Both stories were focused around specific events and yet the Oscars reached its highest cumulative reach figure in quicker time and reached more people. Looking at the Twitter figures for both stories it becomes clear why. There were 11,559 accounts tweeting about the Oscars, markedly more than the 1,500 tweeting about the Miliband story.

HOW THE MILIBAND STORY SPREAD ON TWITTER



[14] http://uk.reuters.com/article/2014/02/26/uk-britain-politics-labour-eu-idUKBREA1P0KM20140226.

Conclusions

Online is opening up many more sources of news for consumers and some are making the most of this through sites like Twitter. However, in the cases we analysed it is clear that its reputation as a news source depends on the active participation of news brands, journalists, and breaking news accounts.

Twitter's strength, however, lies also in its ability to combine this with first-hand accounts including celebrities and politicians. This allows a rapid flow of information at all stages of a story, allowing audiences that are interested to get a fuller picture of an event as it develops.

We also find that journalists have a particular affinity with Twitter where they can show personality, share more details about their work, and interact with followers. News organisations are less interactive and tend to operate more in broadcast mode – often linking through to further information and analysis. Social media is not all about interactivity, the importance of trusted information sources remains paramount even in Twitter.

While the two stories we looked at are different in many ways, in one important respect the way they have played out in Twitter is similar. There was so much build-up that, by the time the actual event happened, most people had already been exposed to the story.

It is over 400 years since the first newspaper was published. While in these terms Twitter is young, its importance as a news source has grown at incredible speed. Audiences like the mix of fact and opinion, authenticity and interaction, that it allows and it seems set to remain a pivotal part of the news ecosystem for the foreseeable future.

Hayley Millard and Arthur Blair contributed additional research to this essay.

POSTSCRIPT AND FURTHER READING

The authors welcome feedback on this report and suggestions on how to improve our work via reuters.institute@politics.ox.ac.uk as well as potential partnerships and support for our ongoing work. In the meantime here is a list of further reading.

/// OTHER RELEVANT SURVEYS

William H. Dutton and Grant Blank, with Darja Groselj,
2013 Oxis Survey: Cultures of the Internet (Oxford: Oxford Internet Institute, 2013)

Ofcom,

- *The Communications Market Report* (Aug. 2013): http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr13/
- *Measuring News Consumption in the UK* (Sept 2013): http://stakeholders.ofcom.org.uk/market-data-research/other/tv-research/news-2013/
- *UK Audience Attitudes to the Broadcast Media: Sources Used for News and Attitudes towards Impartiality* (May 2013): http://stakeholders.ofcom.org.uk/market-data-research/other/tv-research/attitudes-broadcast-media/

Pew Research Center's Project for Excellence in Journalism,

- *The State of the News Media* (Mar. 2014): http://stateofthemedia.org.
- *World Internet Report Fifth Edition* (2013) http://www.worldinternetproject.net

/// OTHER RELEVANT PUBLICATIONS FROM THE REUTERS INSTITUTE

(all available: http://reutersinstitute.politics.ox.ac.uk/publications/risj.html)

Nicola Bruno and Rasmus Kleis Nielsen, Survival is Success:
Journalistic Online Start-Ups in Western Europe (2012)

Lara Fielden,
Regulating for Trust in Journalism: Standards Regulation in the Age of Blended Media (2011)

Robin Foster,
News Plurality in a Digital World (2012)

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The Changing Business of Journalism and its Implications for Democracy (2010)

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The BBC and Our Need for it to be Right (2012)

Nic Newman, Mainstream Media and the Distribution of News in the Age of Social Discovery

- *#UKelection2010, Mainstream Media and the Role of the Internet: How Social and Digital Media Affected the Business of Politics and Journalism* (2010)
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- *Are Foreign Correspondents Redundant?* (2010)
- *Delivering Trust: Impartiality and Objectivity in the Digital Age* (2012)
- *Simon Terrington and David A. L. Levy, The Public Appetite for Foreign News on TV and Online* (2013)

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