

Reuters Institute Digital News Report 2018



Reuters Institute Digital News Report 2018

Nic Newman with Richard Fletcher, Antonis Kalogeropoulos,
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Foreword

Dr David A. L. Levy

Director, Reuters Institute for the Study of Journalism (RISJ)

This is our seventh annual report that explores the changing environment around news across countries. The report is based on a survey of more than 74,000 people in 37 markets, along with additional qualitative research, which together make it the most comprehensive ongoing comparative study of news consumption in the world. Europe remains a key focus, where we cover 25 countries including Bulgaria for the first time this year, but we also cover six markets in Asia (Japan, South Korea, Taiwan, Hong Kong, Malaysia, and Singapore) along with four Latin American countries (Brazil, Argentina, Chile, and Mexico) and the United States and Canada from North America.

The report has expanded more than sevenfold since its creation, from five countries in 2012 to 37 in 2018, but it is not yet fully global. Our use of online polling and the need to make meaningful comparisons have meant we have focused on countries with high internet penetration and which are either broadly democratic or generally compare themselves to countries with a democratic tradition.

This year's report comes amid continuing concern about so-called 'fake news' and about the role of tech companies (platforms) in facilitating the spread of misinformation. Investigations have been launched in many countries, whether about misinformation, use of customer data to target political advertising, or the impact of the tech companies on the news industry. Against that background we've tried to understand more about audience concerns about different kinds of information online, to provide evidence about the state of the industry across our 37 countries as well as insights into the relationship between news publishers and their users.

As with previous reports we've done this by triangulating survey data, focus groups and intelligence from expert contributors across all of our countries. We have also introduced some new approaches, through looking at trust at the brand level and the use of focus groups. As politicians and industry grapple for solutions on how to balance freedom of expression and regulation in a digital age we also bring further evidence about how audiences view these issues. We have explored news literacy for the first time, developing a model that allows us to understand more about how this influences trust and the ability to spot misinformation.

This year we've looked in much more detail at the changing shape of social media and the increasing importance of messaging apps for news. We conducted a series of focus groups in four countries (United States, the United Kingdom, Germany, and Brazil) where we talked to users of Facebook and WhatsApp about how they used these networks for news. This has brought out a rich set of insights about why people are often reluctant to share and post openly about contentious subjects and are increasingly choosing safer, more private spaces.

In terms of partnerships we continue to deepen our relationships across the world with a multiplicity of distinguished academic institutions. These have helped in a variety of different ways, from preparing country profiles to in-depth analysis of the results. Many of our partners are also organising events or country reports looking in more detail at national themes – adding wider value to this international project.

Inevitably this printed report can only convey a small part of the data that we've captured. More detail is available on our website (www.digitalnewsreport.org), which contains slidepacks, charts, along with a licence that encourages reuse, subject to attribution to the Reuters Institute. All of the website charts have a feature which allows them to be used by – or be embedded in – any other website or blog. On the website, you can also find a full description of our survey methodology, the full questionnaire, and an interactive charting feature, which allows data to be compared across countries, and over time. Raw data tables are also available on request along with documentation for reuse.

Making all this possible, we are hugely grateful to our sponsors: Google, the BBC, Ofcom, the Broadcasting Authority of Ireland, the Dutch Media Authority (CvdM), the Media Industry Research Foundation of Finland, the Fritt Ord Foundation in Norway, the Korea Press Foundation, and Edelman UK, as well as our academic sponsors at the Hans Bredow Institute, the University of Navarra, the University of Canberra, the Centre d'études sur les médias, Université Laval, Canada, and Roskilde University in Denmark.

We are also grateful to YouGov, our polling company, who did everything possible to accommodate our increasingly complex requirements and helped our research team analyse and contextualise the data.

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 2018.

- The data were weighted to targets based on census/industry accepted data on age, gender, and region to represent 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 lower than 1% in Finland, averaged around 3%, but was as high as 8% in the United States.
- A comprehensive online questionnaire¹ was designed to capture different aspects of news consumption.
- Face-to-face focus groups were held in the US, UK, Germany, and Brazil to explore issues relating to social media and messaging apps. These were conducted by Kantar Media.

Our survey was conducted using established online panels run by our polling company YouGov and their partners. Because this is an online survey 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. The main purpose is 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.

In fourteen countries, respondents this year were only able to take the survey using a desktop or laptop computer. Although all other quotas were met (e.g. age, gender, region), it is possible that the figures for device use in those countries may have been affected, specifically computer/laptop figures may be inflated and in some countries smartphone and tablet numbers may be lower than expected. It is important to keep in mind that many people use multiple devices, and the dataset still contains smartphone and tablet users who also use a computer. The countries affected were Italy, Japan, Netherlands, Brazil, Spain, Canada, Czech Republic, Poland, Portugal, Austria, South Korea, Switzerland, Hungary, and Turkey. We have flagged the problem on country pages where appropriate.

Country	Final sample size	Total population	Internet penetration
Europe			
UK	2117	66m	95%
Austria	2010	8.6m	85%
Belgium	2006	11m	88%
Bulgaria	2021	7m	60%
Croatia	2010	4.2m	74%
Czech Rep.	2020	11m	88%
Denmark	2025	5.7m	97%
Finland	2012	5.5m	93%
France	2006	65m	87%
Germany	2038	81m	90%
Greece	2014	11m	69%
Hungary	2005	9.8m	81%
Italy	2040	60m	87%
Ireland	2007	4.7m	94%
Netherlands	2010	17m	95%
Norway	2027	5.3m	>99%
Poland	2005	39m	73%
Portugal	2008	10m	72%
Romania	2048	19m	63%
Slovakia	2006	5.4m	85%
Spain	2023	46m	87%
Sweden	2016	9.9m	93%
Switzerland	2120	8.5m	89%
Turkey*	2019	80m	70%
Americas			
US	2401	327m	96%
Argentina	2012	44m	79%
Brazil*	2007	211m	66%
Canada	2022	37m	90%
Chile	2008	18m	77%
Mexico*	2007	130m	65%
Asia Pacific			
Australia	2026	25m	88%
Hong Kong	2016	7.4m	87%
Japan	2033	127m	93%
Malaysia	2013	32m	78%
Singapore	2018	5.8m	84%
South Korea	2010	51m	93%
Taiwan	1008	24m	88%

* Please note that in Brazil, Mexico, and Turkey our samples are more representative of urban rather than national populations, which should be taken into consideration when interpreting results.

Source: Internet World Stats (<http://www.internetworldstats.com>)

¹ The full questionnaire can be accessed at www.digitalnewsreport.org

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 is the author of *Europe's Digital Revolution: Broadcasting Regulation, the EU and the Nation State* (Routledge, 1999/2001), and joint author or editor of several RISJ publications.



Nic Newman is Research Associate at the Reuters Institute and is also a consultant on digital media, working actively with news companies on product, audience, and business strategies for digital transition. He writes an annual report for the Institute on future media and technology trends.



Dr Richard Fletcher is a Research Fellow at the Reuters Institute for the Study of Journalism. He is primarily interested in global trends in digital news consumption, the use of social media by journalists and news organisations, and more broadly, the relationship between computer-based technologies and journalism.



Dr Antonis Kalogeropoulos is a Research Fellow at the Reuters Institute for the Study of Journalism. His doctoral work was focused on the effects of exposure to economic news. His research interests include political communication, journalism, and audience research.



Prof. Rasmus Kleis Nielsen is Director of Research at the Reuters Institute for the Study of Journalism, Professor of Political Communication at the University of Oxford, and Editor in Chief of the *International Journal of Press/Politics*. His work focuses on changes in the news media, political communication, and the role of digital technologies in both.

Country-level commentary and additional insight around media developments have been provided by academic partners and by our network of Reuters Journalist Fellows around the world². Authorship is referenced at the bottom of the respective country page in Section 3.

Additional expert analysis and interpretation of the survey data were provided by the team at YouGov, in particular, Charlotte Clifford, Justin Marshall, Sloane Francis Grant, David Eastbury, and Stephanie Frost.

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.



Section 1

Executive Summary and Key Findings

Nic Newman

Research Associate, Reuters Institute
for the Study of Journalism

This year's report contains signs of hope for the news industry following the green shoots that emerged 12 months ago. Change is in the air with many media companies shifting models towards higher quality content and more emphasis on reader payment.

We find that the move to distributed content via social media and aggregators has been halted – or is even starting to reverse, while subscriptions are increasing in a number of countries. Meanwhile notions of trust and quality are being incorporated into the algorithms of some tech platforms as they respond to political and consumer demands to fix the reliability of information in their systems.

And yet these changes are fragile, unevenly distributed, and come on top of many years of digital disruption, which has undermined confidence of both publishers and consumers. Our data show that consumer trust in news remains worryingly low in most countries, often linked to high levels of media polarisation, and the perception of undue political influence. Adding to the mix are high levels of concern about so-called 'fake news', partly stoked by politicians, who in some countries are already using this as an opportunity to clamp down on media freedom. On the business side, pain has intensified for many traditional media companies in the last year with any rise in reader revenue often offset by continuing falls in print and digital advertising. Part of the digital-born news sector is being hit by Facebook's decision to downgrade news and the continuing hold platforms have over online advertising.

With data covering nearly 40 countries and five continents, this research is a reminder that the digital revolution is full of contradictions and exceptions. Countries started in different places, and the speed and extent of digital disruption partly depends on history, geography, politics, and regulation. These differences are captured in individual country pages that can be found towards the end of this report. They contain important industry context written by local experts – alongside key charts and data points from each market. The overall story is captured in this executive summary, followed by Section 2 with chapters containing additional analysis on key themes.

A SUMMARY OF SOME OF THE MOST IMPORTANT FINDINGS FROM OUR 2018 RESEARCH

- The use of social media for news has started to fall in a number of key markets after years of continuous growth. Usage is down six percentage points in the United States, and is also down in the UK and France.³ Almost all of this is due to a specific decline in the discovery, posting, and sharing of news in Facebook.
- At the same time, we continue to see a rise in the use of messaging apps for news as consumers look for more private (and less confrontational) spaces to communicate. WhatsApp is now used for news by around half of our sample of online users in Malaysia (54%) and Brazil (48%) and by around third in Spain (36%) and Turkey (30%).
- Across all countries, the average level of trust in the news in general remains relatively stable at 44%, with just over half (51%) agreeing that they trust the news media *they themselves* use most of the time. By contrast, 34% of respondents say they trust news they find via search and fewer than a quarter (23%) say they trust the news they find in social media.
- Over half (54%) agree or strongly agree that they are concerned about what is real and fake on the internet. This is highest in countries like Brazil (85%), Spain (69%), and the United States (64%) where polarised political situations combine with high social media use. It is lowest in Germany (37%) and the Netherlands (30%) where recent elections were largely untroubled by concerns over fake content.
- Most respondents believe that publishers (75%) and platforms (71%) have the biggest responsibility to fix problems of fake and unreliable news. This is because much of the news they complain about relates to biased or inaccurate news from the mainstream media rather than news that is completely made up or distributed by foreign powers.
- There is some public appetite for government intervention to stop 'fake news', especially in Europe (60%) and Asia (63%). By contrast, only four in ten Americans (41%) thought that government should do more.
- For the first time we have measured news literacy. Those with higher levels of news literacy tend to prefer newspaper brands over TV, and use social media for news very differently from the wider population. They are also more cautious about interventions by governments to deal with misinformation.
- With Facebook looking to incorporate survey-driven brand trust scores into its algorithms, we reveal in this report the most and least trusted brands in 37 countries based on similar methodologies. We find that brands with a broadcasting background and long heritage tend to be trusted most, with popular newspapers and digital-born brands trusted least.
- News apps, email newsletters, and mobile notifications continue to gain in importance. But in some countries users are starting to complain they are being bombarded with too many messages. This appears to be partly because of the growth of alerts from aggregators such as Apple News and Upday.
- The average number of people paying for online news has edged up in many countries, with significant increases coming from Norway (+4 percentage points), Sweden (+6), and Finland (+4). All these countries have a small number of publishers, the majority of whom are relentlessly pursuing a variety of paywall strategies. But in more complex and fragmented markets, there are still many publishers who offer online news for free.
- Last year's significant increase in subscription in the United States (the so-called Trump Bump) has been maintained, while donations and donation-based memberships are emerging as a significant alternative strategy in Spain, and the UK as well as in the United States. These payments are closely linked with political belief and come disproportionately from the young.
- Privacy concerns have reignited the growth in ad-blocking software. More than a quarter now block on any device (27%) but that ranges from 42% in Greece to 13% in South Korea.
- Television remains a critical source of news for many – but declines in annual audience continue to raise new questions about the future role of public broadcasters and their ability to attract the next generation of viewers.

³ Polling was done before the full effect of Facebook's January algorithm changes had come into effect – perhaps with the exception of the United States.

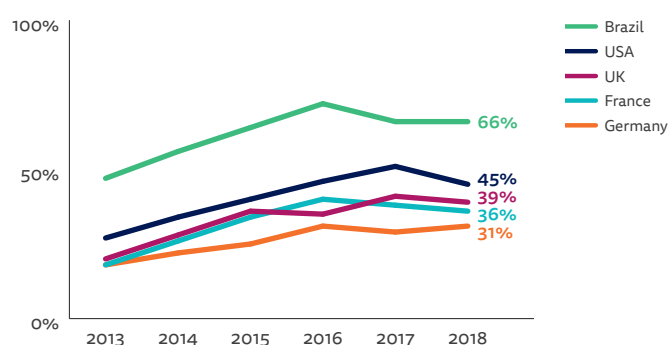
- Consumers remain reluctant to view news video within publisher websites and apps. Over half of consumption happens in third-party environments like Facebook and YouTube. Americans and Europeans would like to see fewer online news videos; Asians tend to want more.
- Podcasts are becoming popular across the world due to better content and easier distribution. They are almost twice as popular in the United States (33%) as they are in the UK (18%). Young people are far more likely to use podcasts than listen to speech radio.
- Voice-activated digital assistants like the Amazon Echo and Google Home continue to grow rapidly, opening new opportunities for news audio. Usage has more than doubled in the United States, Germany, and the UK with around half of those who have such devices using them for news and information.

SOCIAL MEDIA REVERSE

For the last seven years we have tracked the key sources for news across major countries and have reported a picture of relentless growth in the use of social media for news. Now, in many countries, growth has stopped or gone into reverse.

Taking the United States as an example, weekly social media use for news grew steadily from 27% in 2013 to a peak of 51% before falling back significantly this year to 45% (-6). To some extent this represents a readjustment after the social media frenzy around the Trump inauguration last year – but these patterns also exist elsewhere. In the UK usage grew from 20% in 2013 to 41% in 2017 before falling back. The decline in Brazil appears to have started in 2016.

PROPORTION THAT USED SOCIAL MEDIA AS A SOURCE OF NEWS IN THE LAST WEEK (2013-18) – SELECTED MARKETS



Q3. Which, if any, of the following have you used in the last week as a source of news?
Base: Total 2013–2018 sample in each market.

Looking in more detail at these declines, we can see that they are almost entirely due to changes in the use of Facebook, consistently the most widely used social network for news in almost every country. News consumption via Facebook is down 9 percentage points in the United States and 20 points with younger groups. In our urban Brazilian sample the use of Facebook for news has fallen to 52% – a 17 point change from 2016. It is important to note that the decline is not universal. Facebook news usage is up significantly in Malaysia and the Czech Republic. But in most countries the picture is one of decline.

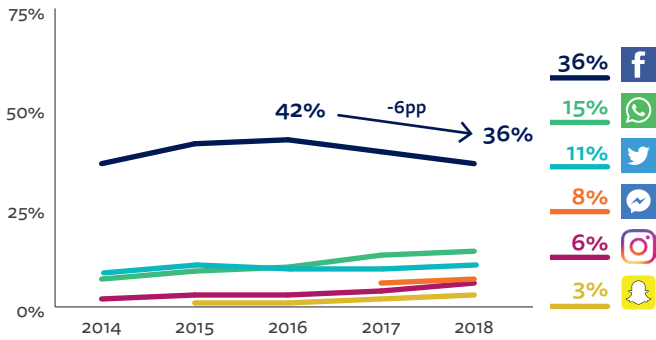
PROPORTION THAT USED FACEBOOK AS A SOURCE OF NEWS IN THE LAST WEEK – SELECTED MARKETS

Country	2018	Change from 2017
US	39%	(-9)
UK	27%	(-2)
Germany	24%	(-1)
Italy	51%	(-)
Spain	48%	(+1)
Ireland	38%	(-3)
Norway	40%	(-1)
Sweden	36%	(-)
Finland	33%	(-2)
Denmark	34%	(-5)
Netherlands	29%	(-3)
Greece	60%	(-2)
Austria	30%	(-4)
Czech Rep.	57%	(+10)
Poland	54%	(+1)
Hungary	60%	(-4)
Turkey	51%	(-3)
Japan	9%	(-)
South Korea	25%	(-3)
Hong Kong	56%	(+2)
Malaysia	64%	(+6)
Canada	38%	(-2)
Brazil	52%	(-5)
Mexico	61%	(-2)
Australia	41%	(+2)
Portugal	53%	(-1)
Argentina	60%	(-5)

Q12b Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Base: Total 2017/2018 sample in each market.
Note: Also showing change from 2017.

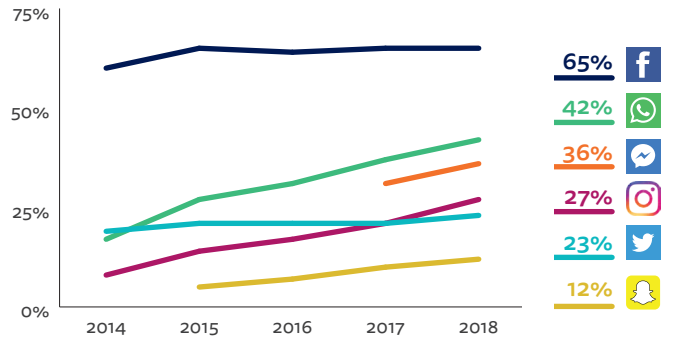
It is worth noting that average Facebook use for *any purpose* has remained broadly static since 2015, while its use for news has declined. This suggests either a fall in general engagement or a reduction in exposure to news by the Facebook algorithm, as the company prioritises interactions with family and friends and tries to limit the impact of 'fake news'. At the same time we have seen a rise in the usage of alternative platforms such as WhatsApp, Instagram, and Snapchat. In the next two charts we have averaged social news usage for around a dozen of the countries we have been tracking since 2014. Average news usage for Facebook has fallen from 42% in 2016 to 36% today while other networks are stable or have been growing rapidly.

PROPORTION THAT USED EACH SOCIAL NETWORK FOR NEWS IN THE LAST WEEK (2014-18) – SELECTED MARKETS



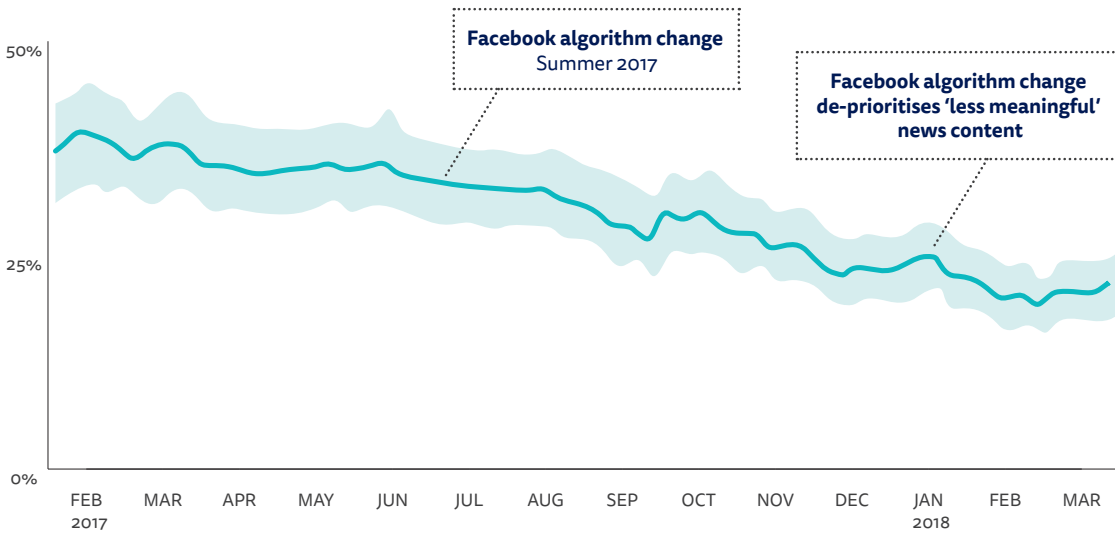
Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Base: Total sample in selected markets: 2014 = 18859, 2015 = 23557, 2016 = 24814, 2017 = 24487, 2018 = 24735. Note: From 2015-18, the 12 markets included are UK, US, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia, Brazil. In 2014, we did not poll in Australia or Ireland.

PROPORTION THAT USED EACH SOCIAL NETWORK FOR ANY PURPOSE IN THE LAST WEEK (2014-18) – SELECTED MARKETS



Q12A. Which, if any, of the following have you used for any purpose in the last week? Base: Total sample across selected markets: 2014 = 18859, 2015 = 23557, 2016 = 24814, 2017 = 24487, 2018 = 24735. Note: From 2015-18, the 12 markets included are UK, US, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia, Brazil. In 2014, we did not poll in Australia or Ireland.

PROPORTION OF REFERRALS TO NEWS WEBSITES FROM FACEBOOK (FEB 2017–MAR 2018)



Source: Parsely. Based on share of referrers attributed to Facebook across 2500 publishers across countries within the Parsely network

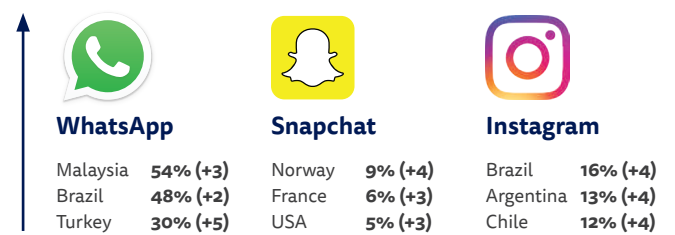
It should be noted that our polling was conducted (mostly) before the implementation of a much-publicised Facebook algorithm change in January 2018 reorientating towards ‘meaningful interactions’, with a consequent reduction in news content. Since then, a number of publishers have reported a further substantial decline in referrals. One publisher, Little Things, went out of business in early 2018, citing Facebook’s algorithm changes as a critical factor.⁴

There have also been substantial increases in the use of other networks in a number of countries. WhatsApp and Instagram have taken off in Latin America and parts of Asia. Snapchat is making progress in parts of Europe and the United States, particularly with younger users.

OTHER NETWORKS ARE TAKING UP THE SLACK

WhatsApp use for news has almost tripled since 2014 and has overtaken Twitter in importance in many countries. But this conceals wide variations from 54% in Malaysia (+3) and 48% in Brazil (+2) to 14% in Germany (+2) and just 4% in the United States (+1).

PROPORTION THAT USED EACH SOCIAL NETWORK FOR NEWS IN THE LAST WEEK – SELECTED MARKETS



Q12b. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Base: Total 2017/2018 sample in each market. Note: Also showing change from 2017.

⁴ <https://www.forbes.com/sites/kathleenchaykowski/2018/03/06/facebooks-latest-algorithm-change-here-are-the-news-sites-that-stand-to-lose-the-most/#2b70d00334ec>

To some extent these increases have also been driven by publishers changing their strategies in a bid to become less dependent on Facebook. For example, more media companies have adopted the 'Instagram story' format, which now attracts around 300m daily active users per day.⁵ The BBC have extended their activities on Instagram into longer features and quizzes reaching 4.8m followers.

Meanwhile, Snapchat became an important source of news during the school shootings in Florida in February 2018, illustrating the subsequent anti-gun protests across the state with a navigable map (see below). The Snapchat Discover (news section) now reaches 17% of 18–24s in the United States, 13% in France, and 32% in Norway.

“What I’ve noticed was Facebook was everything to me but now Snapchat and Instagram through different mediums are coming right up and making things more convenient than Facebook.”

(M, 20–29, US focus group)

SNAP MAP OF STUDENT PROTESTS ON GUN LAWS & BBC REFOCUS ON INSTAGRAM



Source: Snap Inc and BBC/Instagram.

WhatsApp does not currently make it easy to distribute news or engage directly with users, but a number of media organisations in Latin America and Spain have been experimenting with 'broadcast lists', news groups, quizzes, and audio notes.

For more analysis see Section 2.6: *The Rise of Messaging Apps for News*

WHY ARE CONSUMERS RELYING LESS ON FACEBOOK FOR NEWS?

Survey and focus group evidence suggests a combination of push and pull factors at play. Consumers are being put off by toxic debates and unreliable news, but they are also finding that alternative networks offer more convenience, greater privacy, and less opportunity to be misunderstood.

FACEBOOK vs WHATSAPP – HOW CONSUMERS PERCEIVE THESE BRANDS



Multi-faceted, creepy, ego-centric, uncool uncle, mid-life crisis, clean, generic



Best friend, fun, brings people together, straightforward, honest, reliable, discrete

Source: Focus group participants aged 20–45 in US, UK, Brazil, Germany. Conducted Feb 2018.

One common theory is that people's Facebook networks have got so big over time that they no longer feel comfortable sharing content openly. As a result, they are moving discussion to messaging apps where they can be sure that they are talking to 'real friends'. This is sometimes referred to as context collapse,⁶ an idea reflected in these focus group comments.

“I use Facebook less, because I don’t want to have a close contact to many of my ‘friends’ there. These friends on Facebook are not important for me anymore. With my inner circle of friends I communicate via WhatsApp.”

(M, 20–29, Germany)

“It’s a message to you [on WhatsApp] not a message to everyone.”

(F, 30–45, US)

Focus group respondents still talk about finding stories on Facebook (and Twitter) but then they will often post them to a WhatsApp group for discussion, often using a screen grab or a headline without a link. This is partly to avoid uncomfortable political debates over Brexit or Donald Trump:

“I’ve actually pulled back from using Facebook a lot since the whole political landscape changed over the last few years because I just find everyone’s got an opinion.”

(F, 30–45, UK)

“Even though you may disagree with your friend on WhatsApp, friends are able to keep that good level of respect, everybody shares their opinion, and anyone who disagrees can joke about it. It’s a lighter mood to debate news with friends on WhatsApp than on Facebook.”

(M, 20–29, Brazil)

⁵ <https://techcrunch.com/2017/11/01/instagram-whatsapp-vs-snapchat>

⁶ This term was coined by danah boyd: <http://www.zephoria.org/thoughts/archives/2013/12/08/coining-context-collapse.html>

Mark Zuckerberg has pledged to fix Facebook and to recreate a safer and less toxic environment. Twitter CEO Jack Dorsey has also made cleaning his network of trolls and harassment a priority. The next year is likely to be a critical test for both companies in restoring trust and interaction on their platforms. Facebook believe that deprioritising some news content is part of that process, but our qualitative research suggests they need to be careful. Consumers still value news as part of the wider mix – they would just like it to be more reliable and more relevant. With discussion moving to other platforms, they say, Facebook could end up feeling rather empty.

MESSAGING APPS ON THE RISE IN AUTHORITARIAN COUNTRIES

A safe place for free expression has been one factor driving the rapid growth of messaging apps in markets like Turkey, Malaysia, and Hong Kong. In our data we find a strong correlation between use of networks like WhatsApp and self-expressed concern about the safety of posting political messages. The highest levels of concern (65%) are in Turkey where a failed coup two years ago led to opponents of President Erdoğan being jailed and the media muzzled. In a country that the US NGO Freedom House recently labelled ‘not free’ for the first time, encrypted messaging apps like WhatsApp have proved a relatively safe way to express political views. Malaysia which is labelled ‘partly free’ by Freedom House is introducing new laws that could see anyone convicted of peddling ‘fake news’ imprisoned for up to six years.⁷

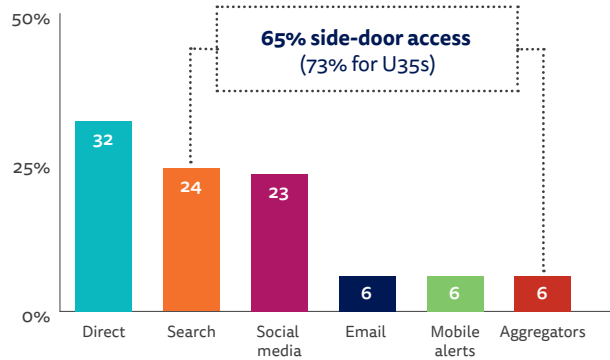
GATEWAYS TO NEWS

The vast majority of our respondents (65%) prefer to get to news through a side door, rather than going directly to a news website or app. Over half (53%) prefer to access news through search engines, social media, or news aggregators, interfaces that use ranking algorithms to select stories, rather than interfaces driven by humans (homepage, email and mobile notifications).

Our survey has tracked the advance of distributed and algorithmic access over the last seven years but our 2018 data suggest a pause at least. The figures are almost identical with a year ago with just mobile alerts, which tend to be produced by human editors, edging up slightly.

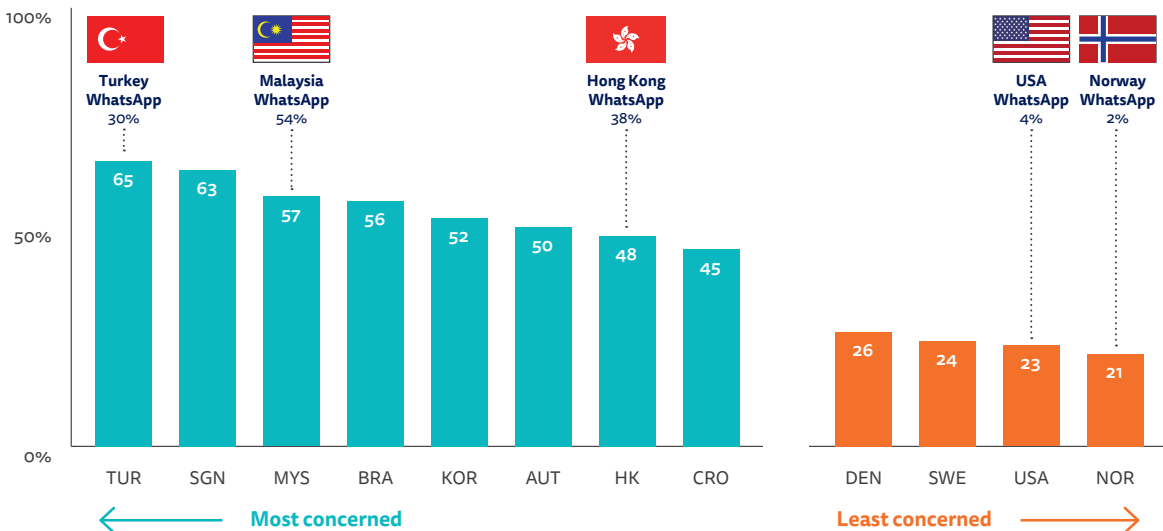
PROPORTION THAT SAY EACH IS THEIR MAIN GATEWAY TO NEWS – ALL MARKETS

01100 Algorithmic selection (search, social media, aggregators) as popular as editorial selection (53%)
10110
11110



Q10a_new2017_rc. Which of these was the MAIN way in which you came across news in the last week? Base: All/under 35s that used a gateway to news in the last week: All markets = 69246/19755.

PROPORTION CONCERNED THAT OPENLY EXPRESSING THEIR POLITICAL VIEWS ONLINE COULD GET THEM INTO TROUBLE WITH THE AUTHORITIES – SELECTED MARKETS



Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Q13a_2018_1. Please indicate your level of agreement with the following statements. I tend to think carefully about expressing my political views openly on the internet because this could get me into trouble with the authorities. Base: Total sample in each market.

⁷ <https://www.nytimes.com/2018/04/02/world/asia/malaysia-fake-news-law.html>

Behind the averages, however, we find very significant country differences. Two-thirds of respondents in Finland (65%) and Norway (62%) prefer to go direct to a website or app. Elsewhere, preferred access is often via social media, with over four in ten preferring this route in Chile (43%), Bulgaria (42%), and Malaysia (40%). In some Asian countries, aggregators or search are the main gateways. In South Korea, where Naver and Daum are dominant platform players, 47% say they prefer to access via search and 30% via a news aggregator. Just 5% prefer to go directly to a news website or app, by far the lowest in our survey. In Japan, where Yahoo! is the main news portal, the figure is just 15%.

These differences in preferred access points are critical. They show that Nordic publishers still have direct relationships with their readers, making it much easier to charge for content online. Korean and Japanese publishers, on the other hand, find themselves much more dependent on third-party platforms to access audiences.

AGE DIFFERENCES

Though the shift to distributed and side door access seems to have slowed down for now, this may just be a temporary pause with new technologies such as Voice on the way. The demographic push from under 35s remains towards greater use of mobile aggregators and social platforms and less direct access. Pulling in the opposite direction is the rebirth of email, which is being used as an effective tactic to bring consumers back to news websites directly, but this channel mainly resonates with over 45s. It is unlikely to attract younger users.

PROPORTION THAT SAY EACH IS THEIR MAIN GATEWAY TO NEWS – SELECTED MARKETS

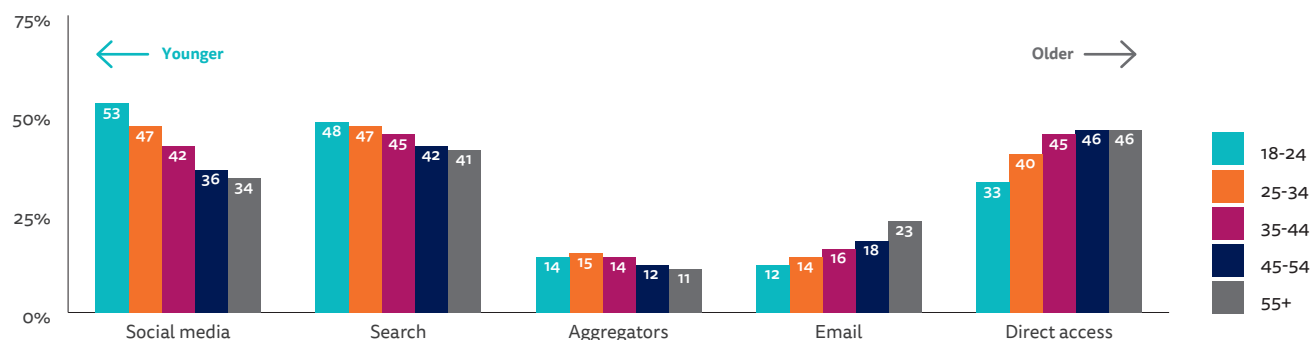
Top Direct		Top Social	
Finland	65%	Chile	43%
Norway	62%	Bulgaria	42%
Sweden	52%	Malaysia	40%
Denmark	52%	Argentina	37%

Top Aggregators		Top Search	
Japan	36%	South Korea	47%
South Korea	30%	Poland	39%
Taiwan	21%	Italy	39%
Hungary	11%	Czech Rep	38%

Top Email		Top Mobile Alerts	
Belgium	24%	Mexico	13%
France	14%	Taiwan	12%
Portugal	14%	Sweden	12%
USA	10%	Singapore	10%

Q10a_new2017_rc. Which of these was the MAIN way in which you came across news in the last week? Base: All that used a gateway to news in the last week in each market. Note: Base size is around 2000 in each market.

PROPORTION THAT USED EACH AS A GATEWAY TO NEWS IN THE LAST WEEK BY AGE – ALL MARKETS

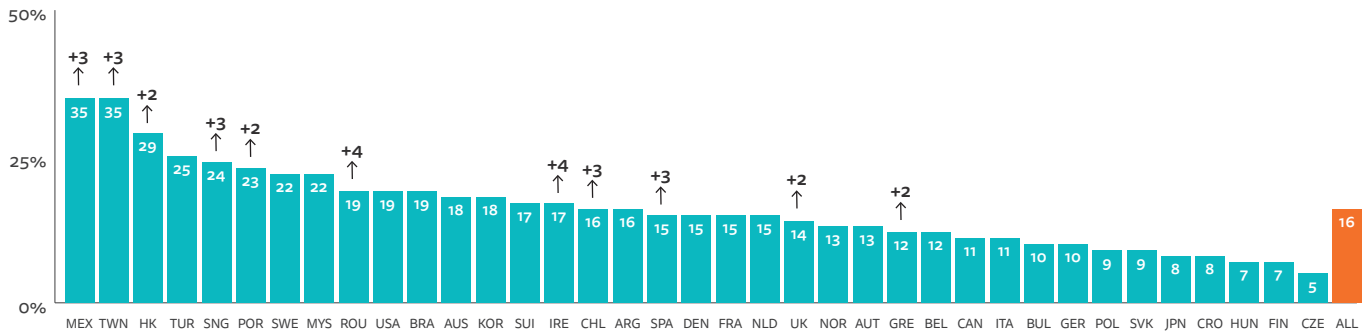


Q10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? Base: 18-24/25-34/35-44/45-54/55+: All markets = 8179/12922/13672/13369/26052.

NOTIFICATIONS AS A GATEWAY

The fastest growing gateway to news over the last three years has been mobile news alerts. These resonate with younger users who frequently start their day with the lock screen. Picking up on this opportunity, publishers have been sending more alerts on a wider range of subjects. They are also starting to use artificial intelligence (AI) to make them more relevant. In the last year we have seen strong growth in Latin America, Spain, and most of Asia. Access has been stable in the US, UK, and much of Europe after two strong years of growth.

PROPORTION THAT RECEIVED A MOBILE NEWS ALERT IN THE LAST WEEK – ALL MARKETS



Q10. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which were the ways in which you came across news stories? Base: Total sample in each market. Note: Also showing change from 2017.

One key question for news companies is whether consumers are receiving too many alerts from too many different providers. Our data show that for those receiving alerts the average number of organisations sending alerts is highest in Hong Kong (5.6) and lowest in the UK (3.1), with an average of 4.2 across all markets.

One reason for these relatively high numbers is that aggregators like Apple News and Upday are now sending alerts automatically in addition to individual news providers. This has increased the number of alerts but also the number of duplicate alerts – and also led to some confusion about where alerts may come from.

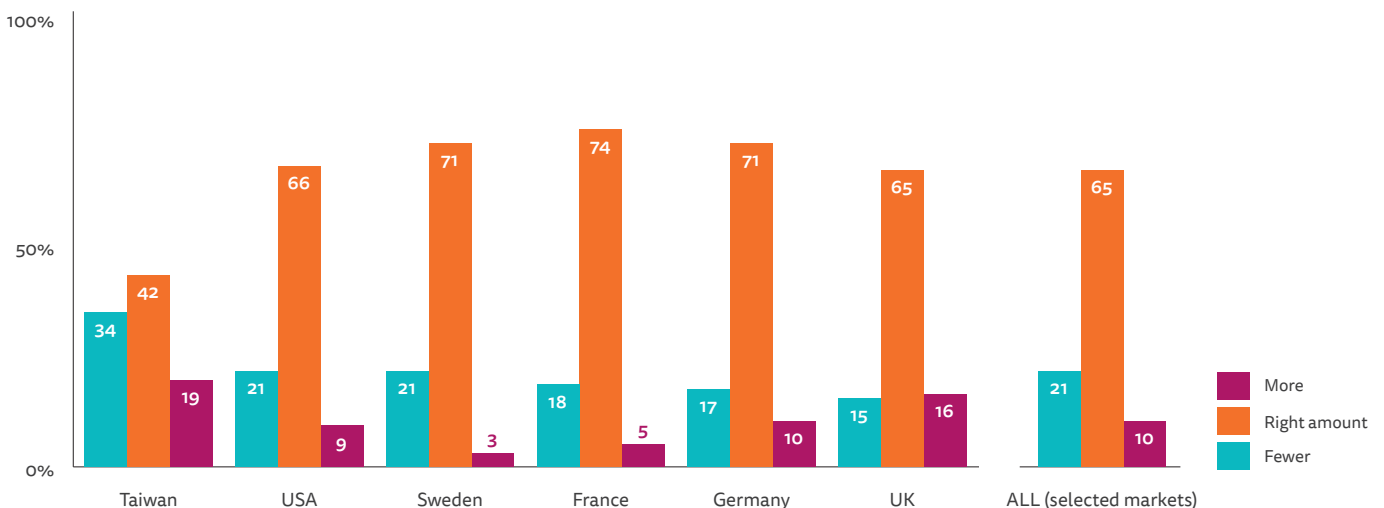
“I don’t know the name of the app. I have an app on my phone, it was already there from the beginning, and breaking news notifications pop up there just like when I get a message.”

(F, 20–29, Germany)

Across all markets twice as many people say they get too many news alerts (21%) as too few (10%), though the majority (65%) still feel they are getting the right amount.

Only in the UK do more people say they would like to get more alerts than fewer. This is likely to be partly because the BBC News app, which sends alerts to around 5m people, is relatively restrained.

PROPORTION WHO WANT TO RECEIVE MORE OR FEWER NEWS ALERTS – SELECTED MARKETS

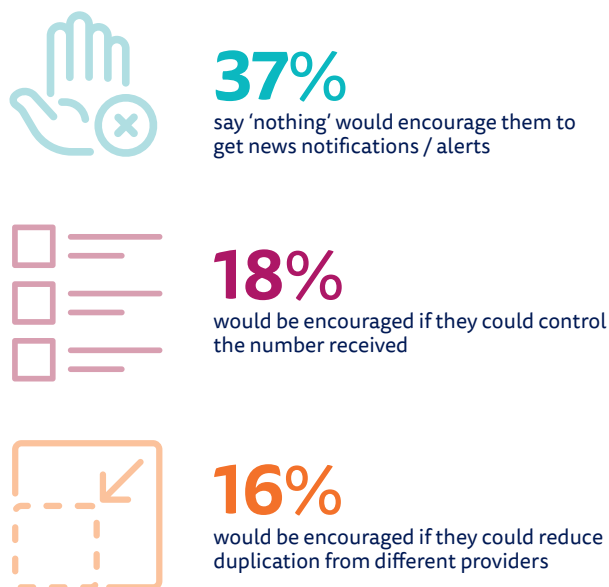


Q10b_2018_2. Thinking about the news notifications you currently receive, which of the following statements do you most agree with? I get too many news notifications/I get the right number of news notifications/I’d be happy getting more news notifications. Base: All who received a news alert in the last week in each/all markets: Taiwan = 350, US = 448, Sweden = 447, France = 299, Germany = 202, UK = 314, Selected markets = 7494. Note: We also asked this question in Italy, Spain, Ireland, Norway, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Turkey, Japan, South Korea, Hong Kong, Singapore, Australia, Canada.

ATTRACTING MORE PEOPLE TO USE ALERTS

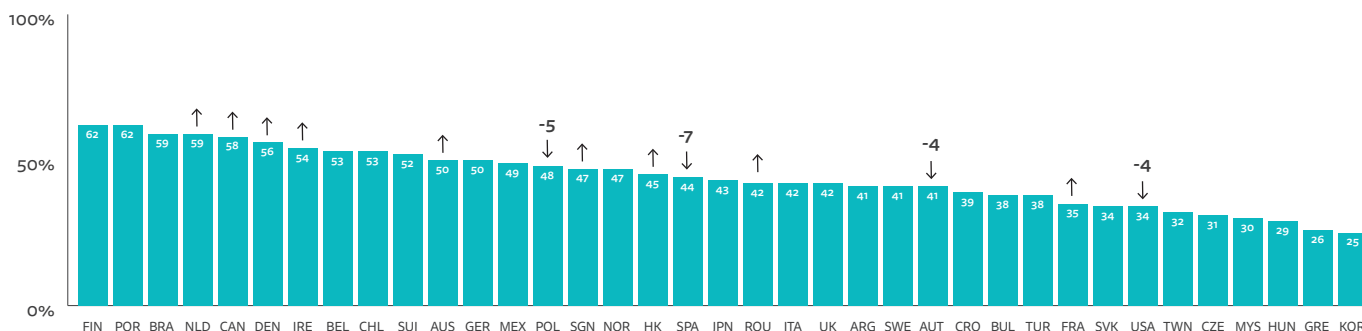
Around four in ten of those not using alerts (37%) say that nothing would persuade them to sign up. But there are opportunities amongst other smartphone users who are interested in news but so far have been reluctant to sign up. The main barriers are the fear of being bombarded with notifications (18%), and concern about receiving the same alert multiple times (16%).

PROPORTION THAT SAY EACH REASON WOULD ENCOURAGE THEM TO USE NEWS ALERTS – SELECTED MARKETS



Q10b_2018_4. You use a mobile device but said you have not received a mobile notification in the last week, which of the following features would encourage you to use or install alerts/notifications for news? Base: All that use a smartphone or tablet but did not receive a news alert in the last week. Selected markets = 44746. Note: This question was not asked in Greece, Brazil, Argentina, Mexico, Chile.

PROPORTION THAT AGREE YOU CAN TRUST MOST NEWS MOST OF THE TIME – ALL MARKETS



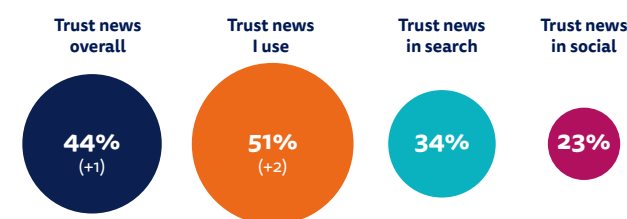
Q6_2016_1. Please indicate your level of agreement with the following statements. I think you can trust most news most of the time. Base: Total sample in each market. Note: Also showing change from 2017.

TRUST IN THE NEWS MEDIA

Winning consumer trust is becoming the central issue of our times as businesses compete for attention in a digital world – and where user allegiance can transfer in the blink of an eye. As the Edelman Trust Barometer⁸ has documented, trust has been declining in many institutions, as well as in the news media, over many years.

But have we now reached the bottom? At an aggregate level, this year, we see a relatively stable picture. Fewer than half of us (44%) say we trust the media most of the time but we are more likely to trust media we use ourselves (51%). This has increased by 2 percentage points in the last year.

PROPORTION THAT SAY THEY TRUST NEWS FROM EACH SOURCE – ALL MARKETS



Q6_2018_1/2/3/4. Please indicate your level of agreement with the following statements. I think you can trust 'most news/'news I consume/'news in social media/'news in search engines' most of the time. Base: Total sample in all markets = 74194.

By contrast, only a third of our aggregated sample says they trust the news they find in search engines (34%) most of the time, while news in social media is seen as even more unreliable (23%). This reflects the previous discussion about the often unsatisfying experience of news in Facebook, but is also a natural consequence of seeing more sources when in aggregated environments (*Digital News Report, 2016, 2017*). If these perspectives are different – which they often are – this can lead to confusion, greater scepticism, and ultimately to a lack of trust.

Looking at more detailed data on general news trust, we see more movement and significant variations across countries. Finland is holding steady at the top (62%) along with Portugal (62%). Greece (26%) and South Korea (25%) remain anchored at the bottom, though their scores have each increased by 2 percentage points. Trust in the news is substantially up in a number of countries, notably Ireland, Canada, the Netherlands, and Slovakia.

⁸ <https://www.edelman.com/trust-barometer>

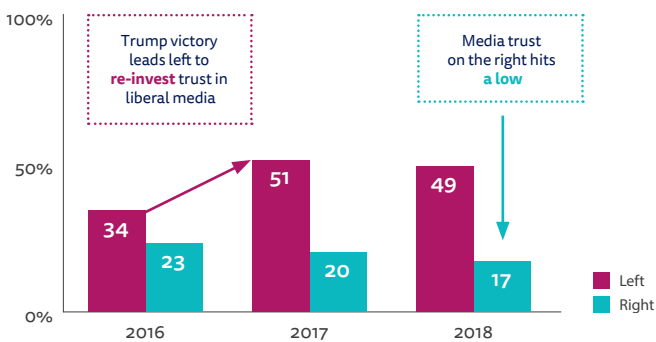
Declining trust often seems to be linked to political tension. Trust is down 7 points in Spain (44%) as the media have become caught up in the wider splits in Spanish society after the Catalan referendum. It is also down in Austria (-4) following a divisive series of elections and in Poland (-5) where the government has been accused of cracking down on private media in the name of combating 'fake news'.⁹

POLARISATION AND TRUST IN THE UNITED STATES

The impact of Donald Trump's first year as US President can be seen in the next chart, which also shows how polarised the news media have become. Trust was already unevenly distributed in 2016, but post-election we find that those who identify on the left (49%) have almost three times as much trust in the news as those on the right (17%). The left gave their support to newspapers like the *Washington Post* and *New York Times* while the right's alienation from mainstream media has become ever more entrenched.

This chart reminds us that trust or lack of trust in the media is closely linked to perceived political bias. In this year's Reuters

PROPORTION THAT AGREE YOU CAN TRUST MOST NEWS MOST OF THE TIME BY POLITICAL LEANING (2016-18) – US



Q1F. Some people talk about 'left', 'right' and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q6_2018_1.** Please indicate your level of agreement with the following statements. I think you can trust most news most of the time. Base: Left/right: 2016 = 476/591, 2017 = 530/533, 2018 = 567/550.

Institute Memorial Lecture, *Washington Post* Editor Marty Baron accepted that in the United States 'tribalism in media consumption is becoming more pronounced',¹⁰ which is why attempts to improve trust levels with better facts or more transparency alone may not be enough. Inclusive reporting that bridges political divides and reflects different perspectives and voices will need to be part of the solution too.

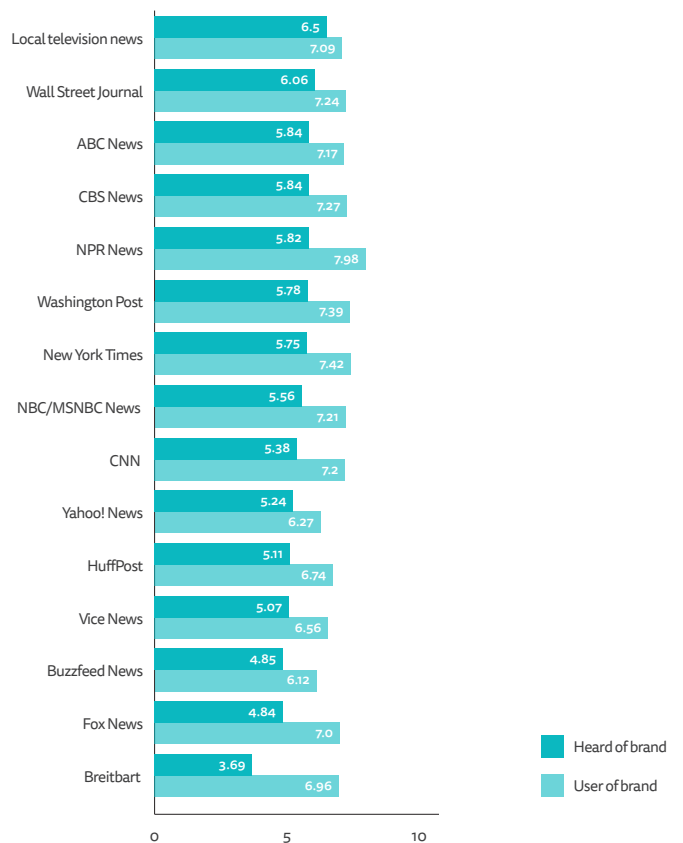
BRAND LEVEL TRUST

We can see this story about polarisation and perceived bias expressed in a new and powerful way with the help of brand level trust scores. For the first time this year, we asked respondents to score top brands in each country (where 0 is not at all trustworthy and 10 is completely trustworthy). Taking the US as an example, we can see scores for all those who have heard of the brand, followed by a second score for those who have actually used it in

the last week. Local television news is most trusted, with a mean score of over six (6.5), and Breitbart least trusted (3.69). However for those who use Breitbart regularly, the trust score jumps to 6.96 reflecting its highly partisan user base.

For more analysis see Section 2.3: Which Brands do we Trust and Why?

AVERAGE LEVEL OF TRUST IN SELECTED NEWS BRANDS – US



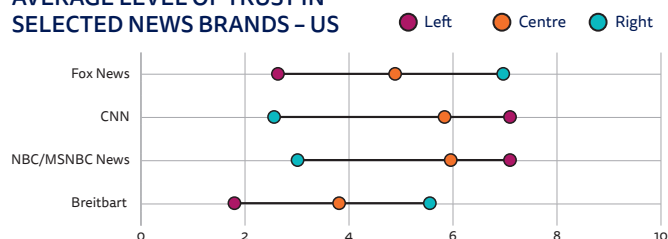
Q6_2018. How trustworthy would you say news from the following brands is? Use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Total sample/all who used each brand in the last week. Note: People who indicated that they have not heard of a brand were excluded. Bases vary for users of each brand, but all were above 50.

⁹ [https://www.washingtonpost.com/news/global-opinions/wp/2017/12/11/the-polish-government-is-cracking-down-on-private-media-in-the-name-of-combating-fake-news \(paywall\).](https://www.washingtonpost.com/news/global-opinions/wp/2017/12/11/the-polish-government-is-cracking-down-on-private-media-in-the-name-of-combating-fake-news (paywall).)
¹⁰ <https://reutersinstitute.politics.ox.ac.uk/our-research/full-text-when-president-wages-war-press-work>

We can also look at the same data through a political lens. In the next chart the trust scores of those who self-identify on the right are represented by blue dots, those from the left by red dots, and those in the centre with orange dots.

Fox News and Breitbart have much higher levels of trust from those on the right (represented by the blue dots) whereas CNN and MSNBC show the reverse. Those on the left give CNN a score of 7.1, with right-leaning respondents rating the network just 2.4. Fox News gets a high rating from the right (6.9) and a very low one from those on the left (2.4). Breitbart News is also well trusted on the right (5.5) but those on the left give it a score of less than two (1.9). Similar charts for other countries (e.g. Germany and UK) show far narrower gaps in partisan trust.

AVERAGE LEVEL OF TRUST IN SELECTED NEWS BRANDS – US



Q1F. Some people talk about ‘left’, ‘right’ and ‘centre’ to describe parties and politicians. With this in mind, where would you place yourself on the following scale? Q6_2018. How trustworthy would you say news from the following brands is? Use the scale below, where 0 is ‘not at all trustworthy’ and 10 is ‘completely trustworthy’. Base: Left/centre/right: US = 567/970/550. Note: People who indicated that they have not heard of a brand were excluded.

TRUST SCORES AND FACEBOOK

These scores are important because Facebook have decided to ask an almost identical question of their community as part of the response to what they call ‘false news’. It’s not entirely clear how they will use the results in their ranking algorithm but it is likely they will downgrade brands with low trust scores and upgrade brands with high scores. This process has already started in the US where they have also said they will uprate brands that are trusted by different types of people.¹¹

Facebook will not reveal their scores, but we are publishing our results for the top news brands in our 37 country pages (see Section 3: Analysis by Country). If Facebook mainly look at all those who have *heard* of the brand, this is likely to benefit

established brands like the *New York Times* in the US or BBC News in the UK. This approach would also tend to down-rate hyper partisan brands like Breitbart because they do not have trust with different types of people. On the other hand, if they take notice of whether an individual uses the brand, people could see *more* content from hyper partisan sites.

Looking at brand trust across countries, we find that TV brands (or digital brands with a TV heritage) score best, followed by upmarket newspaper brands. Digital-born brands and popular newspaper brands do worst. Public broadcasters (PSBs) score best in countries where they are seen to be independent of government. But in countries like Italy and Spain they have lower scores in absolute terms but also in relation to other types. In Spain, flourishing digital-born brands carry more trust than any type of ‘legacy media’.

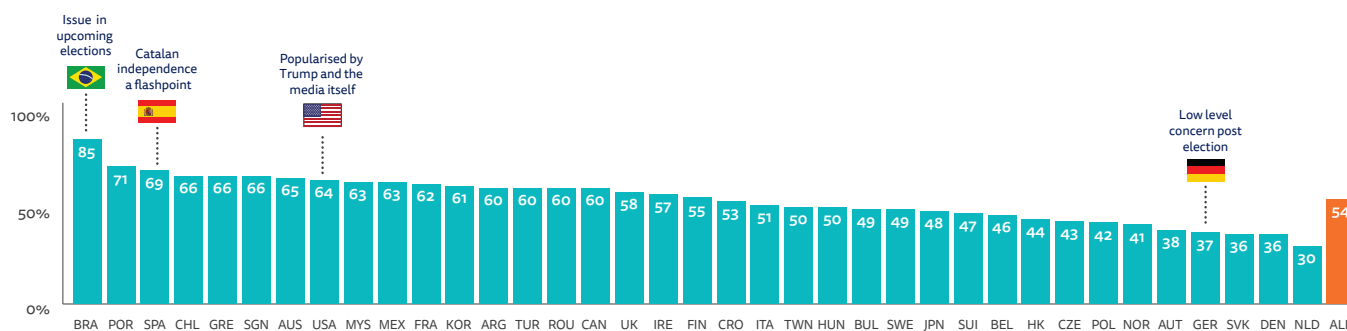
‘FAKE NEWS’ EXPLORED

Related to trust, we have asked a series of further questions this year to understand public concern about ‘fake’ or unreliable news. This is a difficult area to research because the term is both poorly defined and highly politicised. Our approach was, first, to ask about general concern to capture variation across countries and then to break the term down to understand how much people were exposed to different types of unreliable information, identified by audiences in focus groups last year.¹²

More than half of our global sample (54%) expresses concern or strong concern about ‘what is real or fake’, when thinking about online news. There are significant country variations, with Brazil (85%), Spain (69%), France (62%), and the US (64%) at the top end. These are all polarised countries where recent or ongoing election or referendum campaigns have been affected by disinformation and misinformation. By contrast, there is much less concern in Germany (37%)¹³ and the Netherlands (30%)¹⁴ where recent elections passed off largely without alarm. It is also worth noting that politics tends to be less polarised in these countries and social media play a less important role as a source of news.

For more see Section 2.2: Misinformation and Disinformation Unpacked

PROPORTION WHO SAY THEY ARE VERY OR EXTREMELY CONCERNED ABOUT WHAT IS REAL AND WHAT IS FAKE ON THE INTERNET WHEN IT COMES TO NEWS – ALL MARKETS



Q_FAKE_NEWS_1. Please indicate your level of agreement with the following statement. Thinking about online news, I am concerned about what is real and what is fake on the internet. Base: Total sample in each market.

¹¹ <https://www.theverge.com/2018/1/23/16925898/facebook-trust-survey-news-feed-media>
¹² Rasmus Kleis Nielsen, and Lucas Graves, “News You Don’t Believe”: Audience Perspectives on ‘Fake News’, Oxford: RISJ, 2016.
¹³ <https://www.poynter.org/news/fake-news-probably-wont-affect-outcome-germanys-election-heres-why>
¹⁴ <https://www.cnbc.com/2017/03/14/heres-why-the-dutch-election-is-resilient-to-fake-news.html>

DEFINING 'FAKE NEWS' IN MORE DETAIL

In focus groups (UK, US, Brazil, Germany this year) we find that ordinary people spontaneously raise the issue of 'fake news' in a way they didn't a year ago. This is not surprising given extensive use by some politicians to describe media they don't like – and widespread coverage by the media. But we find audience perceptions of these issues are very different from those of politicians and media insiders.

Yes, people worry about fabricated or 'made up' news (58%), but they struggle to find examples of when they've actually seen this (26%). Of all our categories this is the biggest single gap between perception and what people actually see. Even in the United States, examples tend to be historic rather than current:

"I think during the election, the biggest thing I disliked about Facebook was the amount of fake stories that were on there. And I think since then it has gotten so much better."

(M, 30-45, US)

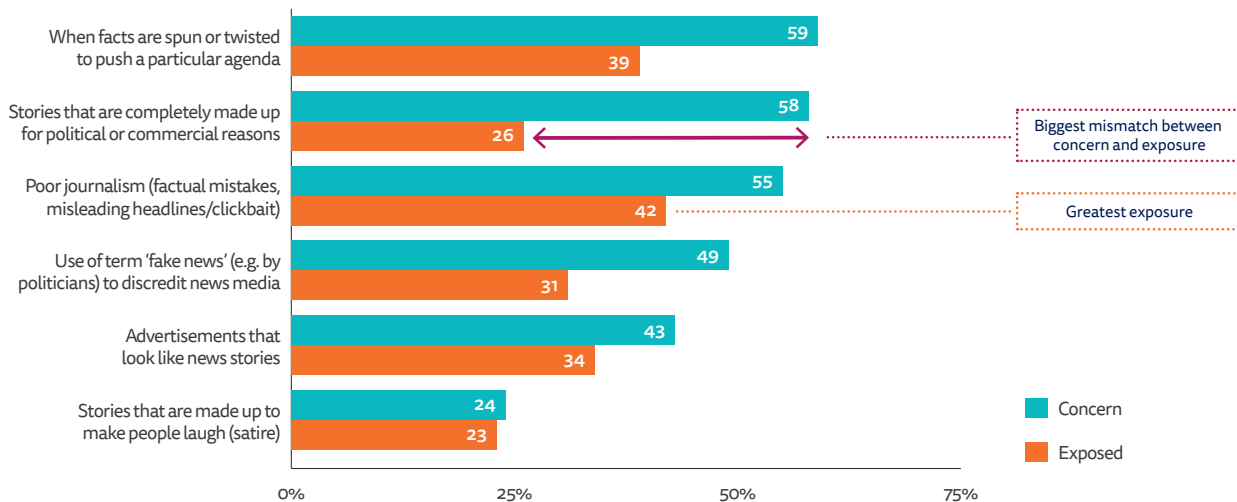
Looking at our survey results, we find that when consumers talk about 'fake news' they are often just as concerned about poor journalism, clickbait, or biased/spun journalism. Indeed, this is the type of misrepresentation that they say they are most often exposed to (42%).

"I see 'fake news' every day. I mean for example, some of the stuff is just mediocre and over exaggerating and it's not always what it seems."

(F, 30-45, US)

While politicians and the media often talk about 'fake news' in terms of Russian propaganda or for-profit fabrication by Macedonian teenagers, it is clear that audience concerns are very different, relating to different kinds of deception largely perpetrated by journalists, politicians, and advertisers.

PROPORTION WHO SAY THEY ARE VERY OR EXTREMELY CONCERNED ABOUT EACH, AND PROPORTION WHO SAY THEY SAW EACH IN THE LAST WEEK – ALL MARKETS



Q_FAKE_NEWS_2. To what extent, if at all, are you concerned about the following. **Q_FAKE_NEWS_3.** In the last week which of the following have you personally come across? Base: Total sample in all markets.

MIXED PICTURE FOR GOVERNMENT REGULATION OF CONTENT

Across countries respondents think that media companies and journalists have the biggest responsibility (75%) to sort this out, not surprising given that most of the content they describe as 'fake news' is generated by them. Consumers also think that tech companies like Google and Facebook should do more to prevent misinformation (71%). But there is a much more mixed picture when it comes to government intervention.

PROPORTION THAT AGREE THE GOVERNMENT SHOULD DO MORE TO COMBAT MISINFORMATION – SELECTED MARKETS

MORE SUPPORT IN EUROPE		
Spain	72%	The Catalonia crisis and alleged use of Russian bots has escalated the issue with politicians demanding action
UK	61%	MPs investigating possible interference in the Brexit vote. The government says it will consider legislation if tech platforms don't clean up their act
France	61%	French President Emmanuel Macron is proposing legislation to ban 'fake news' on websites and in social media during elections
Germany	59%	New law already in place demands tech platforms to remove offensive and illegal content within 24 hours
LESS INTEREST IN US		
US	41%	Congressional investigation into Russian interference in US election using social and digital media

Q_FAKE_NEWS_4_2_3. Please indicate your agreement with the following statement. The Government should do more to make it easier to separate what is real and fake on the internet. Base: Total sample in each market.

While almost two-thirds (61%) agree that governments should do more, it is striking that sentiment is much more in favour of action in Europe (60%) than in the United States (41%), where the issue of 'fake news' seems to have had the most impact.

In the United States, focus group participants were extremely wary of government interference, preferring solutions that encouraged users of the platforms to behave more responsibly.

“Well it’s free speech, right.”

“Yeah it’s what our country is based on, right?”

“You can’t have the government doing that.”

(Fs, 20–29, US)

But in Germany, there was a different picture with respondents often recognising the value of government intervention.

“I noticed that disclaimed content is removed within a few hours.”

(M, 30–45, Germany)

“If the trolls stop posting inadequate comments and debates that would be great.”

(M, 20–29, Germany)

This research is a timely reminder that there is no clear agreement on where the limits of free speech should be set. In the design of their software, US technology companies have long reflected a perspective that is heavily influenced by the First Amendment, but that is now running up against European and Asian traditions that are more mindful of the historic dangers of unregulated free speech. Striking the right balance, particularly at a time of greater polarisation, will be critical for society but also for journalism.

For more on proposed legislation on ‘fake news’ see Section 3: Analysis by Country

THE RISE OF ALTERNATIVE AND PARTISAN NEWS WEBSITES

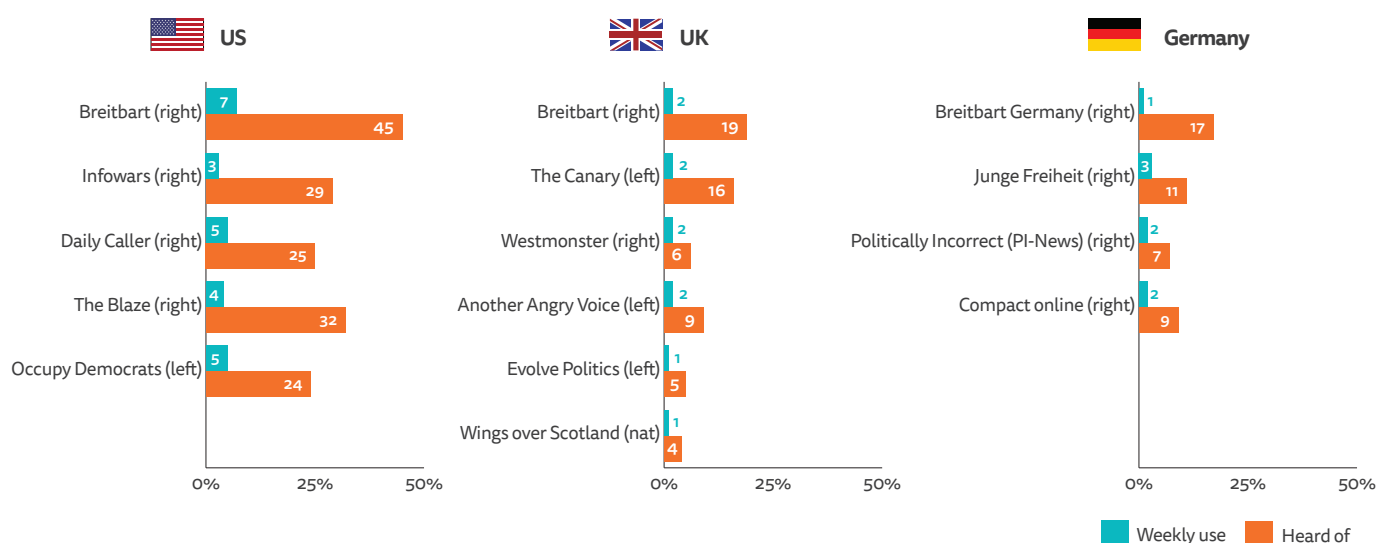
In recent years we’ve seen the emergence of a number of alternative, populist, or partisan websites that have grown rapidly in some countries largely through free social media distribution. In most cases these sites have a political or ideological agenda and their user base tends to passionately share these views.¹⁵ Examples are Breitbart and InfoWars in the United States (right-wing), the Canary and Evolve Politics in the UK (left-wing).

These sites should be distinguished from those that ‘deliberately fabricate the news’, even if they are often accused of exaggerating or tailoring the facts to fit their cause. Partisan sites are said to have played a part in bringing Donald Trump to power in the United States and in mobilising support for Jeremy Corbyn in the UK. Though ideology is a key motivator, some sites are also looking to make money from these activities. The narrowness of their focus also separates them from established news sites like Fox News and Mail Online, which also have a reputation for partisan political coverage, but tend to cover the full range of news (world news, sport, entertainment). Their audiences also tend to be more mixed in terms of left and right.

This year we wanted to understand if these newer, alternative sites and blogs were gaining traction outside the United States. We worked with local European partners in ten countries to identify a number of sites that matched our criteria; namely websites or blogs which have a political or ideological agenda, mainly distributed through social media.

This methodology has a number of drawbacks; these sites are hard to classify and compare. We may have failed to capture important sites in some countries and survey respondents may not always remember smaller sites that they come across in social media.

PROPORTION WHO ARE AWARE OF/USED SELECTED ALTERNATIVE AND PARTISAN BRANDS FOR NEWS IN THE LAST WEEK – SELECTED MARKETS



Q5c_2018_12. Which, if any, of the following have you heard of/used to access news in last week? Base: Total sample in each market.

¹⁵ We can see from our data that the audience is overwhelmingly partisan. For example, over 80% of Breitbart’s audience in the US identifies as right-wing. In the UK around 75% of the Canary’s audience identifies as left-wing, though with a small base.

Firstly, we compare the United States with the United Kingdom and Germany, both of which have significantly lower levels of usage. Breitbart, for example, which operates in all three countries, reaches 7% of the US sample each week, 2% in the UK and just 1% in Germany. In all three countries we also see a large gap between awareness of these sites and actual usage. This suggests either that their impact has been amplified by mainstream media coverage or that people have used them in the past, but that they are less relevant today.

Most partisan sites in the United States come from a right-wing perspective and are popular with users who see the mainstream media as overwhelmingly liberal. Many are run by talk radio hosts (InfoWars, TheBlaze), or outspoken conservative commentators (Daily Caller). Here, one survey respondent offers a clear rationale for using these sites.

“Quite frankly, I get more substantial “real” information from The Blaze and Infowars than I get from today’s ‘fake news’ media and government pundits.”

(M, 76, US)

In the UK there is more of a political mix. Westmonster (2%) is a pro-Brexit site partly funded by right-wing businessman Arron Banks, while the Canary (2%), Another Angry Voice (2%), and Evolve Politics (1%), represent various shades of radical opinion on the left. Wings over Scotland is a popular and influential blog that fights for Scottish independence. Users of these sites say they are looking for alternatives to the mainstream media:

“I’m keen for Brexit to happen. Westmonster and similar news providers report on news the BBC and others avoid because it does not fit with their biased view.”

(M, 66, UK)

“MSM [mainstream media] is biased, always covers the news to show the Tories in a good light, you have to look further if you want the truth.”

(F, 48, UK)

In Germany it might be more accurate to characterise these sites as anti-establishment. Politically Incorrect News (2%) takes a critical stance on Islam¹⁶ along with multiculturalism and immigration and attracts an audience from the extreme left as well as the extreme right. Compact Online (2%) is closely associated with the right-wing populist party AfD¹⁷, while Junge Freiheit (3%) is a nationalist newspaper brand that is reaching new audiences on the web.

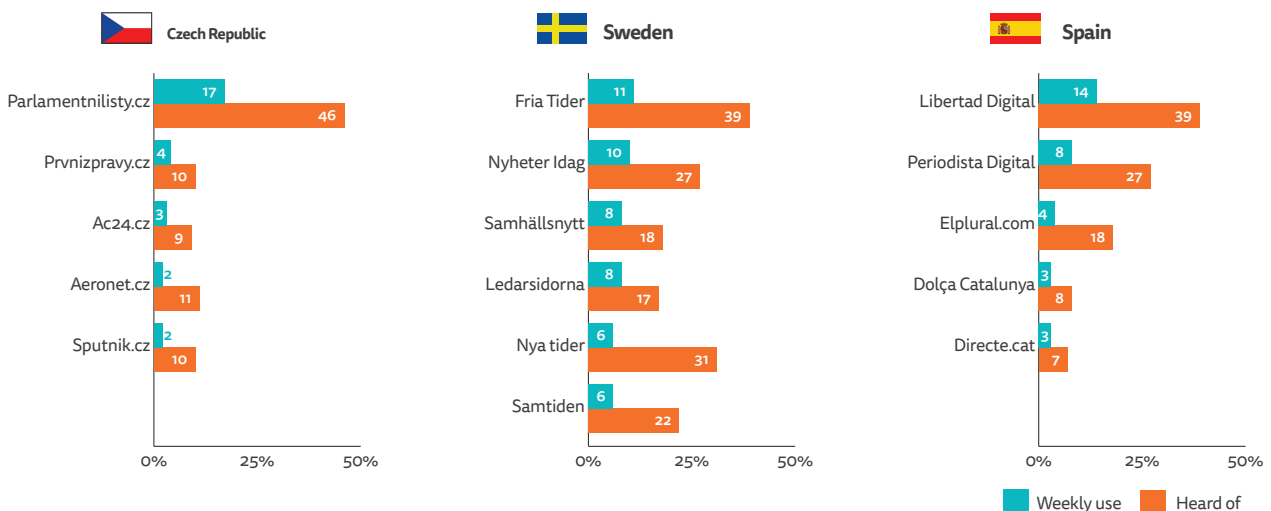
Next we compare three more countries with active alternative and partisan sites. In the Czech Republic a number of sites have been labelled as disinformation websites by NGOs as well as the Centre against Terrorism and Hybrid Threats set up by the Ministry of Interior in 2016. The best known alternative site is Parlamentnilisty.cz which reaches 17% of our sample.¹⁸ Other websites, many of which pursue an anti-EU and pro-Russian agenda, have a more limited reach.

In Sweden, a small number of right-wing websites reach around 10% of our sample each week with an agenda that is largely critical of the country’s liberal immigration policy. Meanwhile in Spain the situation is a little different. The weakness of mainstream media has spawned a large range of alternative political websites and blogs, some of which have existed for many years. Libertad Digital and Periodista Digital follow an anti-Podemos and anti-Catalan independence agenda. Other sites such as Dolça Catalunya (3%) and Directe.cat (3%) focus exclusively on the Catalan issue but from opposing perspectives. OK Diario, which styles itself as the ‘website of the unconformists’, has featured in our list of main Spanish online sites for the last few years with 12% weekly reach.

“They tell the truth I like, not the damned politically correct truth.”

M, 65, Spain

PROPORTION WHO ARE AWARE OF/USED SELECTED ALTERNATIVE AND PARTISAN BRANDS FOR NEWS IN THE LAST WEEK – SELECTED MARKETS



Q5c_2018_1/2. Which, if any, of the following have you heard of/used to access news in last week? Base: Total sample in each market.

¹⁶ PI News says it is engaged in a ‘fight against the Islamisation of Europe’. See: <http://www.pi-news.org/about-us/>

¹⁷ <https://www.zeit.de/2016/25/afd-compact-juergen-elsaesser/komplettansicht>

¹⁸ A round up of alternative sites in the Czech Republic by Forum24: <http://forum24.cz/kdo-nas-dezinformuje-aktualni-prehled-hlavnich-zdroju-a-siritelu-fake-news-v-cesku/>

PARTISAN AND ALTERNATIVE SITES IN EUROPE



German blog, founded 2004
Stance: Anti-immigration, critical of Islam



Czech portal, operating since 2008
Stance: Pro-Russia, anti-immigration



Spanish 'website of the unconformists'
Stance: Anti-Podemos, anti-independence

These sites reflect the wider populist and anti-establishment movements that are sweeping Europe. Many set out to present an alternative to mainstream media, which they see as part of a corporatist or politically correct consensus. For the most part their reach remains limited, but high awareness suggests that their perspectives have been noted by the public and by mainstream media.

These sites have been able to gain currency through social media distribution. But as Facebook takes into account trust scores, becomes more risk averse on content, and refocuses on friends and family, we could see these alternative websites struggle to retain attention.

For more analysis see Section 2.4: *Who Uses Alternative and Partisan News Brands?*

For detailed figures see Section 3: *Analysis by Country*

PAYING FOR ONLINE NEWS

While digital advertising remains a critical source of revenue, most publishers recognise that this will not be enough, on its own, to support high quality journalism. Across the industry we are seeing a renewed push to persuade consumers to pay directly for online news through subscription, membership, donations or per-article payments.

Our data suggest that these efforts are paying off in some countries, but not yet in others – with significant progress being made by Nordic countries in particular. Substantial increases have come from market leaders Norway (+4) and Sweden (+6), as well as Finland (+4).

All these countries have a small number of publishers who are relentlessly pursuing a variety of paywall strategies. They have the added benefit of coming from wealthy societies that value news, have a strong subscription tradition, and where language and the small size of their market protects them from foreign competition.

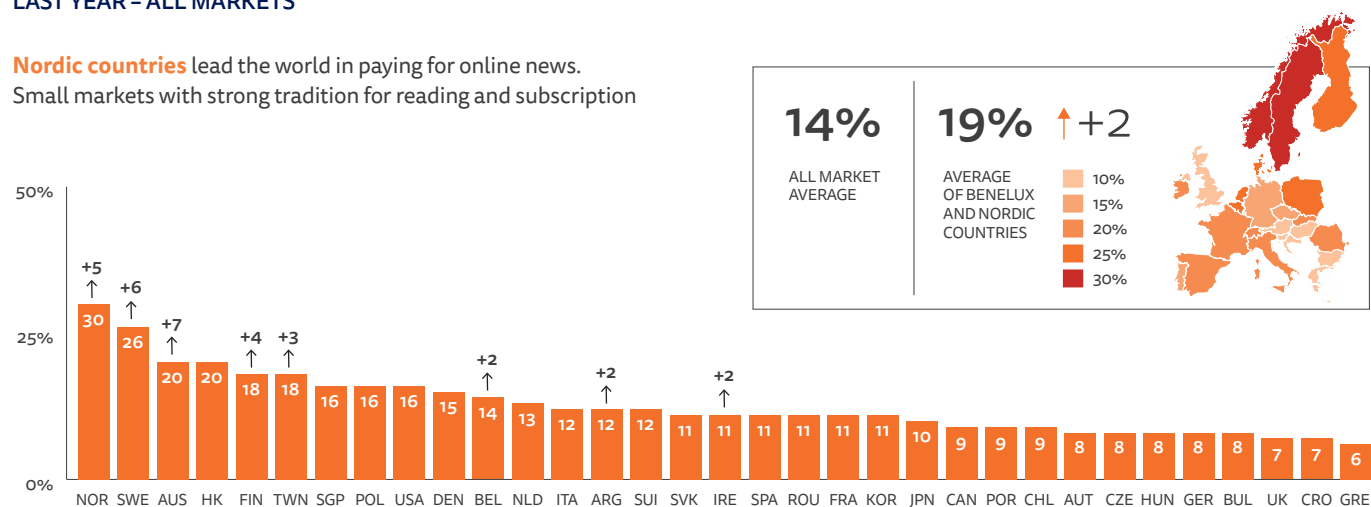
Many Norwegian newspapers use a *hybrid paywall* model (a combination of a monthly page view limit and some premium content) supported by data driven editorial and marketing teams looking to convert users. Using these techniques, *AftenPosten* reached 100,000 digital subscribers in December 2017 after just two years.

Norwegian publishers are even able to charge for local news. The Amedia group, which runs about 60 local newspapers and websites, has 160,000 digital subscribers, up 45% on last year. Adjusting for population size, this would be the equivalent of Trinity Mirror in the UK selling 2m digital subscriptions – or 10m for Gannett in the United States.

In Sweden, leading daily *Dagens Nyheter* (DN) has more than 120,000 digital subscribers, with an average age 20 years younger than the print readership. The company uses predictive data techniques to target likely new subscribers and reduce churn.

PROPORTION THAT HAVE PAID FOR ONLINE NEWS IN THE LAST YEAR – ALL MARKETS

Nordic countries lead the world in paying for online news. Small markets with strong tradition for reading and subscription



Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription or one off payment for an article or app or e-edition). Base: Total sample in each market.



NORWAY
AFTENPOSTEN
 100,000 Digital Subscribers
 Meter + Premium
 Cost / month: €21



SWEDEN
DAGENS NYHETER
 122,000 Digital Subscribers
 Meter + Premium
 Cost / month: €10



FINLAND
HELSINGIN SANOMAT
 70,000 Digital Subscribers
 Meter + Premium
 Cost / month: €17.50

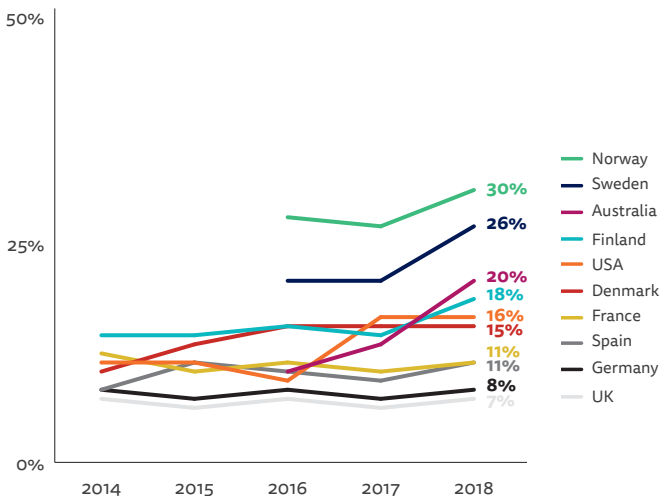
In Finland quality news provider *Helsingin Sanomat* has returned to growth after 25 years of declining circulation thanks to digital. They have 230,000 readers who pay for digital access, of whom 70,000 are digital only (up 40% in the last year) – part of a total subscriber base of almost 400,000.

It is not clear if the conditions for this Nordic success are replicable elsewhere but more publishers across the world are now experimenting with these approaches.

TRUMP BUMP MAINTAINED

In the United States, last year's Trump Bump in subscriptions has been maintained with a headline rate of 16% paying for some kind of online news. Elsewhere, there has been a slight uptick but progress remains painfully slow.

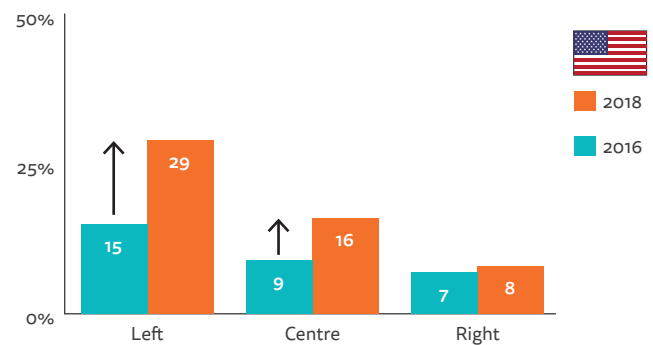
PROPORTION THAT HAVE PAID FOR ONLINE NEWS IN THE LAST YEAR (2014-18) – SELECTED MARKETS



Q7a. Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription or one off payment for an article or app or e-edition). Base: Total 2014-18 sample in each market.

The main beneficiaries of the US surge in subscriptions since 2016 have been liberal newspapers like the *New York Times* and the *Washington Post*. The *Times* has increased digital subscription revenues by almost 50% in the last year as it heads for a target of 10m subscribers globally. The *Washington Post* does not give official numbers but an internal memo revealed digital-only subscribers had reached more than 1 million, doubling in the last year.¹⁹ As the following chart shows, almost all the growth in the last two years has come from those who identify on the left or in the centre – along with under 35s. This is clear statement from those groups about the continuing need for high-quality journalism that can hold the Trump administration to account. These are also frequently respondents with much higher trust in news than most Americans.

PROPORTION THAT HAVE PAID FOR ONLINE NEWS IN THE LAST YEAR BY POLITICAL LEANING (2016 AND 2018) – US



Q1F. Some people talk about 'left', 'right' and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q7a.** Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription or one off payment for an article or app or e-edition). Base: Left/right: 2016 = 476/591, 2018 = 567/550.

Across countries, future likelihood to pay has also increased amongst those who are not already paying. Almost one in five (17%) of those who were not already paying said they are likely to do so in the next twelve months – up 2 percentage points on a year ago.

RISE IN DONATIONS FROM A LOW BASE

The rise of subscription has raised concerns about a two-tier system, where high-quality news is reserved for those who can afford it. This is why some news organisations prefer to keep access free but to ask for voluntary contributions.

In the UK, the *Guardian* adopted the approach in 2016 and since then it has received 600,000 voluntary payments, raising tens of millions of pounds each year. It has also started to crowdfund around specific stories such as the recent US school shootings where it raised \$125,000 to produce solutions-based reporting.

Digital-born organisations in Spain have been partly funded this way for some time, along with National Public Radio (NPR) in the United States and some local news non-profits. Some partisan and right-wing websites also appeal regularly for donations.

¹⁹ <http://money.cnn.com/2017/09/26/media/washington-post-digital-subscriptions/index.html>
²⁰ <https://www.economist.com/news/britain/21735046-two-years-ago-newspaper-was-making-existentially-worrying-losses-next-year-it-hopes-break>



We find that relatively small numbers currently donate to news organisations – just 1% in the UK and Germany, rising to 2% in Spain and 3% in the United States. But the scale of the opportunity could be much bigger. On average a quarter of our online sample (22%) say they might be prepared to donate to a news organisation in the future if they felt it could not cover their costs in other ways.

PROPORTION THAT MADE A DONATION TO A NEWS ORGANISATION IN THE LAST YEAR/WOULD CONSIDER DONATING IN THE FUTURE – SELECTED MARKETS

	TODAY	WOULD CONSIDER DONATING IN THE FUTURE?
US	3%	26%
Spain	2%	28%
UK	1%	18%

Q7ai. You said you have accessed paid for ONLINE news content in the last year. Which, if any, of the following ways have you used to pay for ONLINE news content in the last year?
Q7c_DONATE_2. Please indicate your level of agreement with the following statement. I would consider making a donation to a news outlet I like if they were unable to cover their costs in other ways. Base: Total sample in each market.

In qualitative responses, donations seem to strike a chord with those who are worried about ‘fake news’ and the independence of the media.

For more analysis see section 2.5: Donations and Crowdfunding: an Emerging Opportunity?

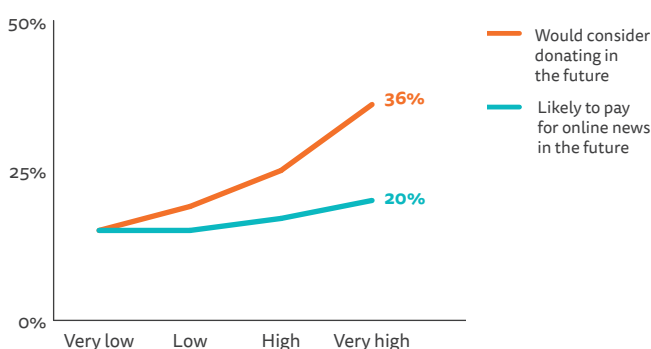
THE LINK BETWEEN NEWS LITERACY AND PAYING FOR ONLINE NEWS

Success in raising donations (or acquiring new subscriptions) is likely to be linked to the extent to which consumer awareness can be raised about the value of journalism and the financial difficulties being faced by many news organisations.

One of our new questions this year reveals that more than two-thirds of respondents (68%) are either unaware of the problems of the news industry or believe that most news organisations are making a profit from digital news. In reality, most digital news sites are operating at a loss, subsidised by investors, alternative revenue streams, or historic profits from broadcast or print.

Those that were aware that digital newspapers are making a loss (10% of our sample) are more likely to pay for a news subscription or give a donation. More widely, this year we have identified different levels of news literacy within our online sample and the next chart shows a clear link between knowledge about how the news industry works and likelihood to pay in the future.

LIKELIHOOD TO PAY FOR THE NEWS IN THE FUTURE BY NEWS LITERACY – SELECTED MARKETS



Q7aiv. 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 next 12 months for online news from particular sources that you like?
 Base: All with very low/low/high/very high news literacy in selected markets = 9926/10037/6619/2869.
Q7c_DONATE_2. Please indicate your level of agreement with the following statement. I would consider making a donation to a news outlet I like if they were unable to cover their costs in other ways. Base: All with very low/low/high/very high news literacy in selected markets = 11149/11898/8069/3790. Note: See Section 2.1: The Impact of Greater News Literacy for a list of markets that were included and for details of how it was calculated.

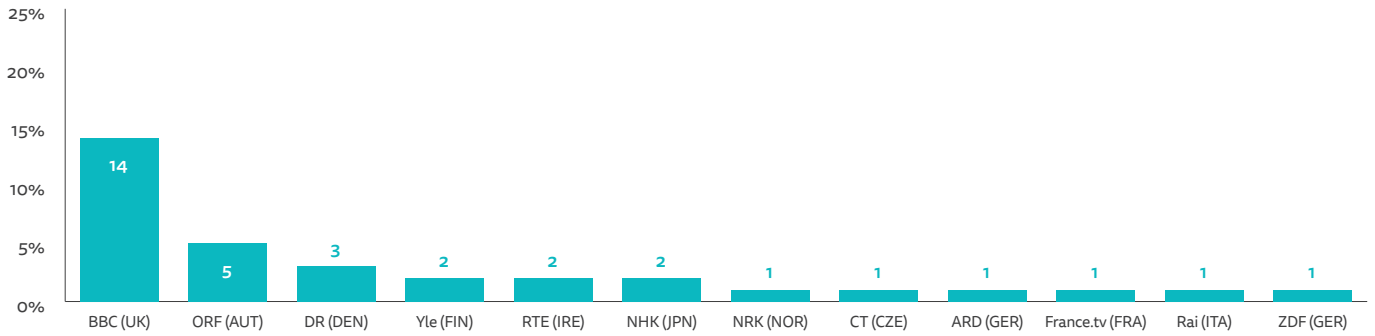
This helps explain why the Guardian’s messaging – which flags ‘how much quality journalism costs to produce’ – has been so successful. Raising awareness about the problems of the industry, consistently applied, will resonate with those people who trust news and find it valuable, and is likely to make all reader payment models much easier to implement in the future.

For more analysis see Section 2.1: The Impact of Greater News Literacy

PUBLIC SERVICE BROADCASTERS UNDER THREAT

Many public service broadcasters across Europe have faced increasing pressures over the last year. Some politicians and sections of the public routinely criticise PSBs for being biased – often from a partisan point of view – while some publishers claim that their existence makes it harder for them to make a profit in an already-challenging environment. This culminated dramatically in Switzerland, where a recent referendum asked citizens to vote on the abolition of the licence fee. The result, however, indicated strong support for public broadcasting, with 72% voting to keep it. Meanwhile, in France, President Macron has reportedly described public broadcasters as a ‘disgrace’ and has pledged to make big changes. In Denmark, a right-wing

PROPORTION WHO EXCLUSIVELY RELY ON PSBs FOR ONLINE NEWS – SELECTED MARKETS



Q5B. Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of internet access)? Base: Total sample in each market.

coalition government has pushed through cuts at the main public broadcaster (DR) of 20% over the next five years, while the BBC needs to find £80m in savings from its news division over a similar time period.

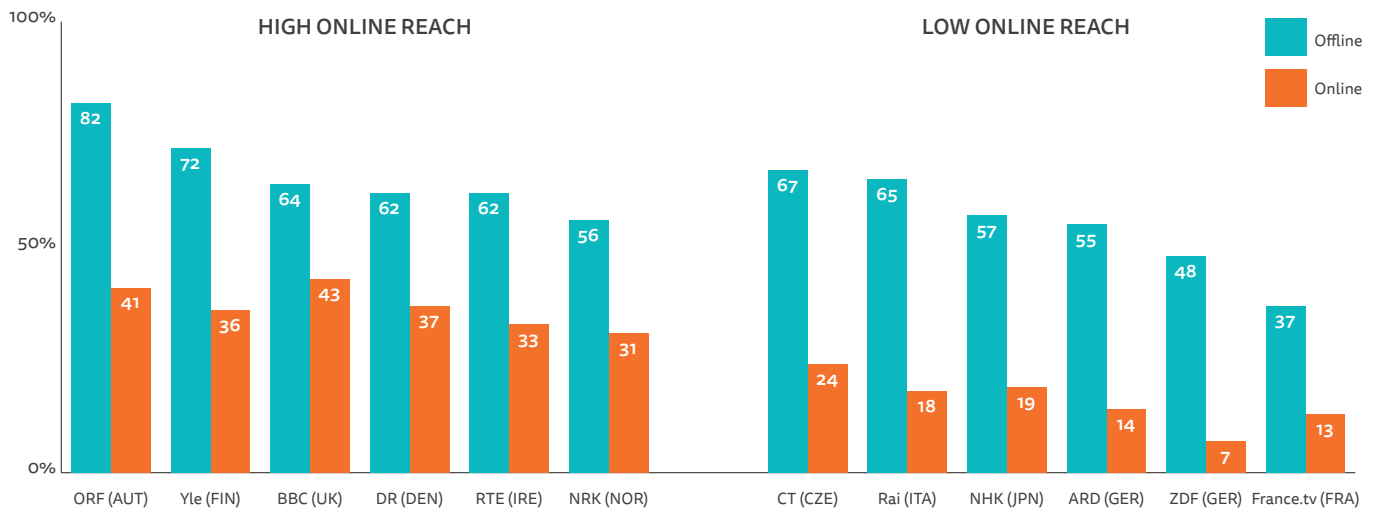
Criticism of public service media comes at a time when media fragmentation and digital disruption, combined with the rise of ‘fake news’, has led some commentators to argue that investment in public media is more necessary than since the end of the Second World War.²¹ Public broadcasters and their websites tend to have the highest trust scores in our survey, at least in countries where their independence is not in doubt. In these cases, overall trust in the news also tends to be higher.

There is also little independent research supporting the idea that public broadcasters have a negative impact upon commercial publishers.²² Our 2016 report highlighted that people who use public service media are no less likely to pay for online news.

More broadly, the proportion of people who exclusively get their online news from public broadcasters is very low. In the UK 14% only use the BBC as an online news source, but the figure for PSBs elsewhere is 5% or lower. Even in countries like Finland, Denmark, and Norway, where investment in public media is considerable, most people who use a public broadcaster supplement this with news from other commercial sources.

It is certainly true that many public broadcasters do attract large online news audiences. But almost all are more widely used offline. The best performing – typically those in Northern and Western European countries – have a weekly online news audience that’s around half the size of its offline audience. In countries where public broadcasting has traditionally received less support, that figure drops to around a one-third or less. This pattern remains largely unchanged from when we made a similar comparison in our 2016 report, and could present a challenge for public broadcasters in the future as offline news use dwindles.

PROPORTION WHO USED SELECTED PSBs ONLINE OR OFFLINE FOR NEWS IN THE LAST WEEK – SELECTED MARKETS



Q5A. Which of the following brands have you used to access news offline in the last week (via TV, radio, print, and other traditional media)? **Q5B.** Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of Internet access)? Base: Total sample in each market.

²¹ <http://www.niemanlab.org/2018/04/emily-bell-thinks-public-service-media-today-has-its-most-important-role-to-play-since-world-war-ii/>

²² Rasmus Kleis Nielsen, Richard Fletcher, Annika Sehl, and David A. L. Levy, *Analysis of the Relation between and Impact of Public Service Media and Private Media*. Oxford: RISJ, 2016.

WEEKLY ONLINE REACH OF GLOBAL NEWS BRANDS – SELECTED MARKETS

Country	HuffPost	BuzzFeed	Vice	CNN	BBC	NYT	Yahoo!
US	18% (-6)	14% (-3)	5% (+1)	16% (-6)	10% (-2)	17% (-1)	18% (-7)
UK	10% (-4)	6% (-2)	2% (-)	2% (-)	43% (-4)	3% (+1)	5% (-1)
Ireland	7% (-3)	8% (+1)	3% (+1)	6% (-1)	17% (+1)	4% (-1)	8% (-4)
Canada	16% (-3)	12% (+1)	6% (+3)	15% (-)	10% (+1)	7% (-)	15% (+1)
Australia	9% (-2)	11% (+4)	5% (+2)	10% (+2)	14% (+3)	7% (+1)	17% (-)
France	10% (-2)	3% (-1)	2% (-)	2% (-)	2% (-1)	2% (-)	10% (+1)
Germany	7% (-)	2% (+1)	1% (-)	3% (-)	3% (-)	2% (-)	6% (-)
Japan	4% (-)	3% (+1)	1% (-)	4% (-)	3% (-1)	1% (-)	51% (-2)
Taiwan	2% (+1)	4% (+1)	2% (+1)	7% (+1)	8% (+3)	3%	54% (+6)
Weighted <small>Average (33 countries)</small>	10%	6%	3%	8%	10%	8%	18%

Q5B. Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of internet access)? Base: Total sample in each market. Note: Weighted average calculated using population data from Internet World Stats and the World Bank: $\text{weighted} = (\text{country population} * \text{percentage adults} * \text{internet penetration} * \text{percentage accessed}) / \text{total population of all countries surveyed}$. Brazil, Mexico, and Turkey are not included due to the absence of reliable data about their urban population. Bulgaria is not included to maintain comparability with last year. Figures for NYT are based on data from 15 countries.

AD-SUPPORTED NEWS MODELS AND THE BATTLE FOR GLOBAL REACH

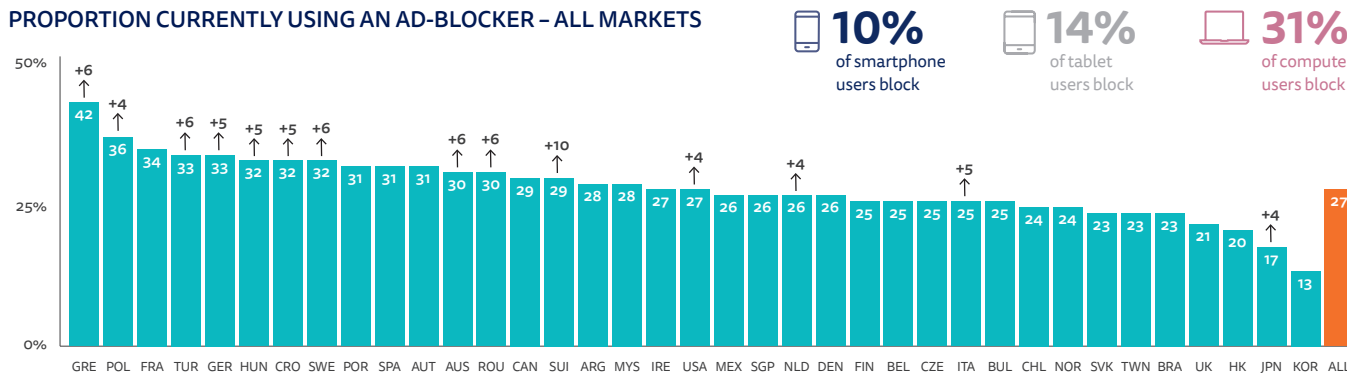
Despite the shift towards reader payment models, it is worth remembering that the majority of online news consumption still happens through free websites, largely supported by advertising (or through public subsidy). This is particularly true for a number of media companies that have set out to create truly global brands. In the last few years many of these brands have been focusing on building up a local reporting presence in a number of countries, sometimes using local partnerships. In the following table, we compare some of the leading companies in terms of weekly reach, by country but also weighted by population.

Yahoo! (18%), one of the internet’s first portals, remains by far the most popular global player even if it does largely aggregate content rather than produce original journalism. It is strong in North America, Latin America, and Asia.

Weekly reach of the rebranded HuffPost is down in most of the countries we measure, perhaps affected by changes to Facebook algorithms, while BuzzFeed News is also down in the US and UK but generally up elsewhere. Traditional news brands, the BBC and CNN, continue to build audiences in multiple languages alongside their broadcast output, which they monetise through advertising and sponsored content.

Ad models continue to be undermined by low rates of return, fraud, and increased consumer concerns about privacy. After a pause in growth last year, the use of ad-blockers is on the rise again, alongside privacy browser extensions that allow specific advertisers to be blocked. More than four in ten (42%) now use blockers in Greece (+6) with significant increases in Germany (+5) and the United States (+4). Concerns about privacy may be driving these changes along with greater awareness.

PROPORTION CURRENTLY USING AN AD-BLOCKER – ALL MARKETS

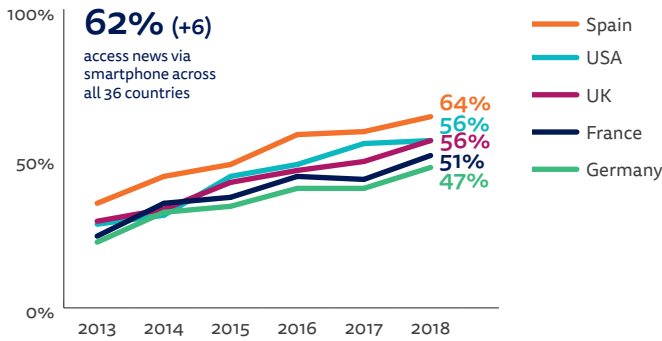


QAD3. And do you currently use software on any of your personal devices (e.g. laptop, smartphone, etc.) that allows you to block adverts on the internet (e.g. Adblock Plus)? Base: Total sample in each market. Note. Also showing change from 2017.

SMARTPHONES AND NEW DEVICES

The importance of smartphones – and our dependence on them – shows no sign of slowing down. On average 62% of our sample say they use the smartphone for news weekly (+6), only just behind the laptop/computer at 64%. In most countries, smartphone reach for news has doubled in six years.

PROPORTION THAT USED A SMARTPHONE FOR NEWS IN THE LAST WEEK (2013-18) – SELECTED MARKETS

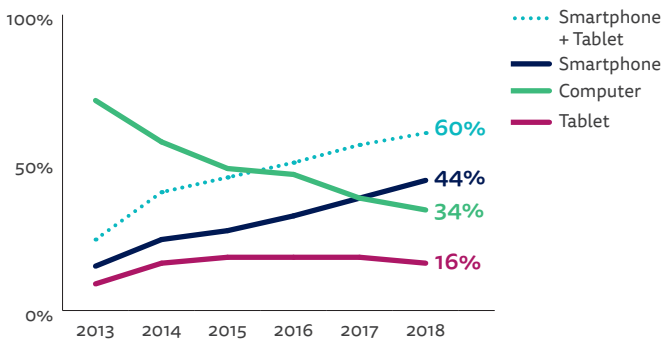


Q8B. Which, if any, of the following devices have you used to access news in the last week? Base: Total 2013-18 sample in each market.

In the UK, as one example, we now see the smartphone overtaking the computer as the MAIN (preferred) device for accessing news. The tablet has started to decline in importance as smartphones have become more powerful and versatile.

These trends are important because shorter audience attention spans and smaller mobile screens are affecting the type of news content produced. Visually rich formats such as Snapchat, Instagram, and Google (AMP) stories are starting to offer new opportunities for mobile storytelling, using native taps and swipes to break up narratives. Pictures and videos need to be reformatted using vertical aspect ratios and often annotated with text to work in a mobile context.

PROPORTION THAT SAY EACH IS THEIR MAIN NEWS DEVICE (2013-18) – UK



UK8b6_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: All in 2013-2018 who used a device for news in the last week: UK = 1638/1598/1795/1691/1733/1816."

VIDEO NEWS CONSUMPTION OVER TIME

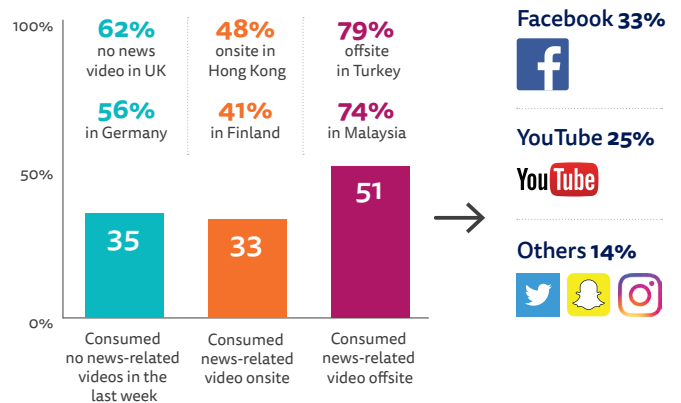
Consumption of online video has grown in recent years, largely through the adoption of native video formats by social media platforms (autoplay, short texted clips, Facebook Live, Periscope, Snapchat video, etc.).

The social video trend may help explain significant country-based differences in consumption, where the highest level of usage tends to be in countries with higher social media use and more offsite traffic (see chart on opposite page).

Splitting this down further, the next chart shows that the majority of news video is now consumed offsite (51%). Facebook alone (33%) accounts for as much video consumption as all news websites put together (33%). But an even larger number (35%) reject news video entirely; that figure rises to more than six in ten in the UK (62%) and over half of our German sample (56%).

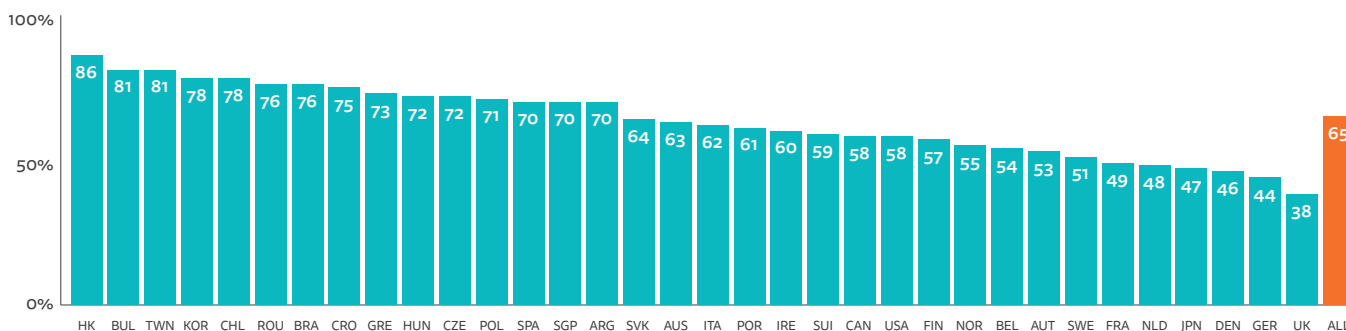
Some markets, such as Hong Kong, have been more successful than others in driving onsite usage (48%) with publishers like Apple Daily pioneering and pushing new video formats. Indeed the appetite for video in Asia (except Japan where there is a very strong reading tradition) appears to be much higher than Northern European countries.

PROPORTION THAT USED ONLINE NEWS VIDEO OFFSITE AND ONSITE – ALL MARKETS



Q11_VIDEO_2018a. Thinking about consuming online news video (of any kind) over the last week, which of the following did you do? Base: Total sample in all markets.

PROPORTION THAT USED ONLINE NEWS VIDEO IN THE LAST WEEK – ALL MARKETS



Q11 VIDEO_2018a. Thinking about consuming online news video (of any kind) over the last week, which of the following did you do? Base: Total sample in each market (excluding urban markets Brazil, Turkey and Mexico).

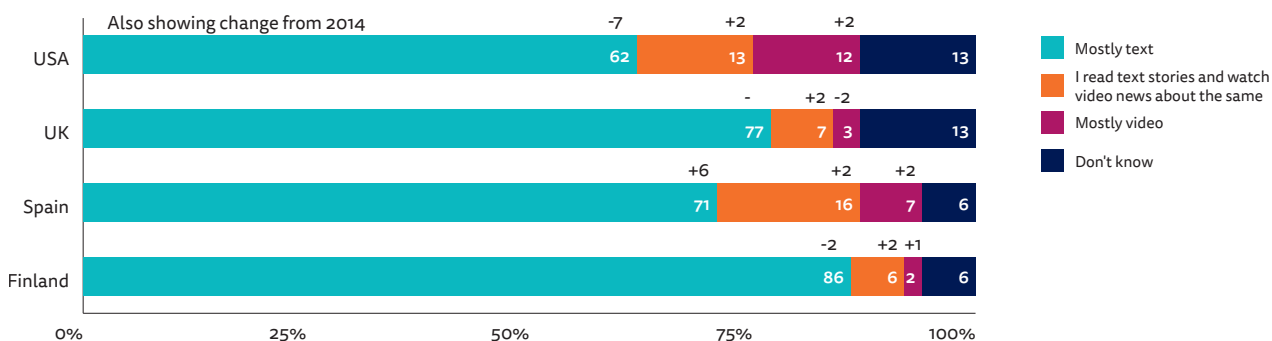
PREFERENCE REMAINS FOR TEXT

In a number of countries we have been tracking content type preferences since 2014 and in all countries we still find an overwhelming preference towards reading rather than watching. The US has pushed furthest towards video (+2), but even here 62% say they mostly consume news in video (+2), but even here 62% say they mostly prefer to consume in text. This figure rises to 86% in Finland. There have been some changes over time (especially in the US and Spain), but these have been modest given the increase in exposure to video through social media.

MORE VIDEOS REQUIRED?

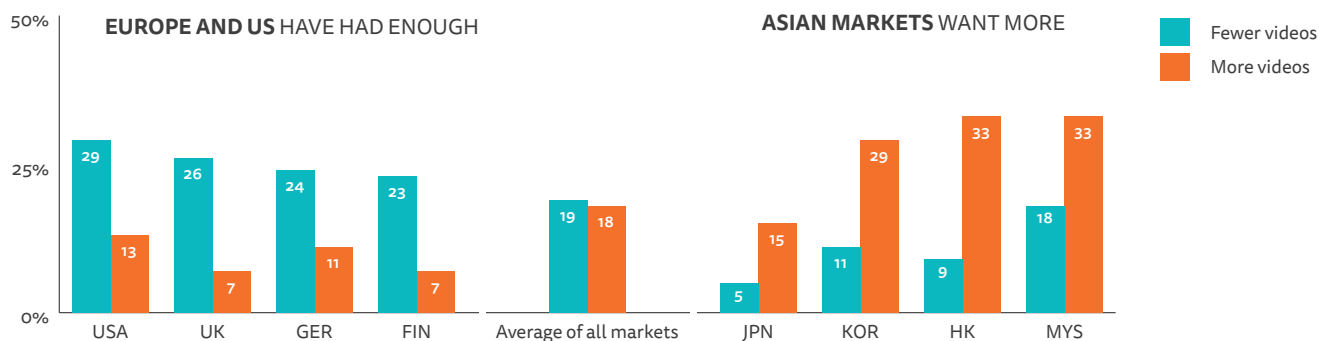
There are commercial pressures to push consumers towards more video, not least because ad premiums are generally higher. But would consumers be happy if text stories were replaced with video? The result of this question is fascinating as it once again reveals a split between different countries and cultures. All Asian countries (including Japan) lean towards wanting more online news video, even if that means sacrificing text. In the US and Northern European countries there is a strong vote for fewer online videos. Age does not seem to be a significant factor.

PROPORTION THAT PREFER NEWS IN TEXT OVER VIDEO – SELECTED MARKETS



OPTQ11D. In thinking about your online news habits, which of the following statements applies best to you? Base: Total sample in each market. Note: Also showing change from 2014.

PROPORTION THAT WANT TO SEE MORE ONLINE NEWS VIDEOS – SELECTED MARKETS



Q11 VIDEO_2018b. News organisations can decide to produce stories in text or video format. With this in mind, in the future would you like to see more videos/the same number/fewer? Base: Total sample in each market.

These differences do not seem to be related to underlying preference, as two-thirds of respondents in Asian countries say they mostly prefer text. The explanation is more likely to be connected to a certain weariness picked up in our European and US focus groups about the amount and type of video being pushed through social media feeds (e.g. Facebook's news feed).

"In some groups, people post videos all the time..."

(M, 30–45, Brazil)

"To me it is about the amount of time. I mean I like visuals when you can put a chart, I like photographs, but I don't want someone to dictate to me how long I have to watch it for."

(M, 30–45, Brazil)

Some of the reluctance to use news video online comes down to a perceived loss of control, while other factors include limited data when on a smartphone and the difficulty of accessing sound on the move. Meanwhile publishers are struggling to monetise short-form formats in particular, with changes in Facebook strategy and algorithms proving an additional frustration. Many are now pivoting away from short-form video and looking for other opportunities.

THE RISE OF AUDIO AND THE ROLE OF PODCASTS









Podcasts have been around for many years but these episodic digital audio files appear to be reaching critical mass as a consequence of better content and easier distribution. The *New York Times* has found success with its Daily Podcast, a 20-minute audio briefing, which has been downloaded more than 100m times. In the UK, the BBC has hundreds of podcasts, most reformatted from radio output. Connectivity is improving in cars, new audio devices are making discovery easier, while advertising and sponsorship opportunities are growing.

Overall, a third of our entire sample (34%) listens to a podcast at least monthly but there are significant country differences. Podcasts are twice as popular in Ireland (38%) as they are in the UK (18%) despite the BBC's extensive, well-promoted, and high-quality podcast output. One theory is that podcasts tend to perform best in countries like the US (33%) and Australia (33%) where people spend a lot of time in their cars. The lower levels of usage in the Netherlands (18%) may relate to shorter commuting distances and more bike travel. But this can't be the full explanation. Loyalty to radio, levels of supply, and the amount of promotion will also be important factors.

Proportionally under 35s listen to twice as many podcasts as over 45s. This is not surprising given that this is a generation that has embraced both smartphones and on-demand services such as Netflix and Spotify. Older groups, by contrast, remain more likely to listen to radio.

For more analysis see Section 2.7: Podcasts and New Audio Strategies

PROPORTION WHO ACCESSED A PODCAST IN THE LAST MONTH – SELECTED MARKETS

Greatest reach			Lowest reach		
	South Korea	58%		Netherlands	18%
	Hong Kong	55%		UK	18%
	Spain	40%		Belgium	20%
	Ireland	38%		Germany	22%



Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Base: Total sample in each market.

VOICE-ACTIVATED SPEAKERS MORE THAN DOUBLE

One further driver of on-demand audio growth has been the emergence of voice-activated speakers. These allow access to existing podcasts as well as new formats such as automated news audio briefings. Media companies like Quartz are also developing apps (or 'skills' as they are known) that allow conversational interaction with the devices.

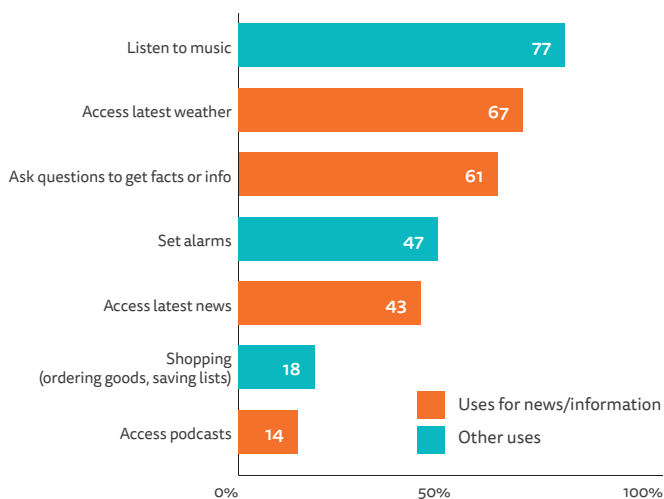
The Amazon Echo range (using the Alexa assistant) is the market leader but is only available in a few markets like the US, UK, Germany, and Australia. South Korea's tech companies Naver and Kakao have their own devices, Apple has launched the HomePod, while the Google Home and Google Assistant will be expanded to over 30 countries this year. Usage for any purpose has more than doubled in early adopter markets. Almost one in ten (9%) now use them in the United States, 7% in the UK, and 5% in Germany.

PROPORTION THAT USE A VOICE-ACTIVATED SPEAKER (2017-18) – SELECTED MARKETS



Q8A. Which, if any, of the following devices do you ever use (for any purpose)? Base: Total 2017-18 sample in each market.

HOW PEOPLE USE VOICE-ACTIVATED SPEAKERS – SELECTED MARKETS



Q8C_2018. You say you have a smart speaker (e.g. Amazon Echo, Google Home, Apple Home Pod) which of the following do you do regularly, by regularly we mean most weeks? Base: All who use a voice-activated speaker. Selected markets = 601. Note: We asked this question in US, UK, Germany, and South Korea.

AND FOR NEWS?

Three-quarters of owners use their speakers for listening to music, but news and information is also an important element. Almost half (43%) access news in some way (flash briefings or similar). Weather is popular (67%), while six in ten (61%) access quick facts. More than one in ten (14%) say they use the device to listen to podcasts.

CONCLUSION

Concerns about the quality of information that emerged in our data last year seem to have solidified now across our 37 countries. Looking back, we can see that disillusion with Facebook set in as early as 2016 while this year's focus groups show heightened worries about privacy, heated conversations and unreliable news. While Mark Zuckerberg has pledged to 'fix' Facebook, politicians in

some countries are looking to seize this opportunity to undermine or control the media. In authoritarian countries, in particular, we see often-draconian laws being introduced with extremely unclear definitions of what 'fake news' means.

This is particularly worrying, because as our report documents, the root causes of this crisis of information do not all lie at the hands of technology companies or malevolent foreign powers. Indeed our research suggests that audiences are more likely to blame media publishers for spinning or twisting facts in a world that often feels more angry and more partisan. Some may be enjoying the discomfort of tech executives as they get hauled in front of powerful politicians, but the implications could be serious if new regulation makes it harder for journalists to hold the rich and powerful to account.

In the light of this, the challenge for media companies is two-fold. Firstly, there are the difficulties involved in navigating an increasingly polarised political climate. From Donald Trump in the United States to Victor Orbán in Hungary, journalists are faced with the choice of sticking to the facts or taking sides. A partisan approach risks inflaming passions and potentially alienating some readers, while a more balanced approach can lead to false equivalence and undermining trust of both sides.

The second challenge is economic and has been building for some time, but may be exacerbated for some by Facebook's decision to focus less on news. As our country pages document, journalist lay-offs continue as media companies look to cut costs and diversify revenue streams. 'Fake news' has galvanised and to some extent woken people up to the importance of quality news, but that narrative only seems to be true for a relatively small subset of the audience; those with more money, those with more education, those who trust the news media, and often those on the political left. Others remain less engaged and less trusting of media than ever.

This year's data show that the move to subscriptions and reader payment is real if unequally distributed. This in turn raises new questions about a two-tier system where those with the least money also have the worst information. In some European countries, PSBs may be part of the answer but many are losing audiences and legitimacy in the move to online with their funding increasingly questioned by hostile politicians. Donations and membership are emerging as alternative routes to squaring the circle of open access and high quality content but it is far too early to know how far this can develop.

Elsewhere, other potential solutions are being tried to help to sustain quality journalism. These include many more examples of co-operation between publishers over journalistic investigations, and sharing of technology or data.

This year has been a reminder that things that once seemed certain – the importance of Facebook and the online advertising model – can shift quickly.

Nothing stands still for long; new technologies like voice-activated interfaces and artificial intelligence are on the way offering new opportunities but also new challenges for audiences, regulators and media companies alike. The future of news remains uncertain but these pages offer some hope at least that quality content may be more rewarded in the future than it has been in the recent past.



Section 2

Further Analysis and International Comparison

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2.1 The Impact of Greater News Literacy

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Discussions over misinformation, disinformation, and 'fake news' have reignited interest in news literacy. A wide range of different actors – from educators to technology companies – believe that raising news literacy would make people better able to separate fact from fiction, potentially limiting the spread of false information and leaving them better equipped to navigate partisan media environments.

Others, however, have struck a note of caution by arguing that we need to think carefully about what news literacy should look like.²³ In the past, news literacy largely meant teaching people to be sceptical, or giving them ways of questioning the stories told by the mass media. How useful are such skills in a world where many believe that trust in institutions, including the news media, is already dangerously low?

In this section we will describe how we measured individual news literacy, before taking a more detailed look at its relationship with different news diets. For us, news literacy refers to knowledge about how the news is made: who makes it, how it is selected, and how it is financed. To do this, we asked respondents in certain countries a series of multiple-choice questions with correct answers. By combining these data with that from other parts of the survey, we can see differences in attitudes and behaviours between those with high and low levels of news literacy. This in turn provides an indication of the possible effect that increasing news literacy might have.

MEASURING NEWS LITERACY

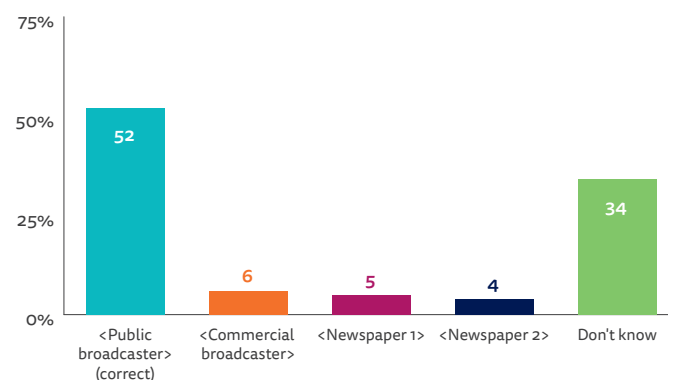
To establish a proxy measure of news literacy, we asked respondents three factual questions. Each probed a different dimension of how the news is made. The questions were multiple choice with a single correct answer. Each respondent's level of news literacy was determined by the number of correct answers they were able to provide. Of course, three questions cannot accurately measure exactly how knowledgeable a person is about an issue as complex and multifaceted as news production. However, they can be used to establish a reliable proxy, and there is a long history of the use of factual questions in survey research to establish knowledge levels among respondents.

THE QUESTIONS

Our first question asked respondents to identify which news outlet from a list of four is not primarily funded by money from advertising.²⁴ This question essentially asks respondents to identify the public broadcaster from a list of television and print outlets that are funded by advertisers. The available options were adjusted to make them country-specific, but always comprised of a commercial broadcaster and two popular newspapers. Here, as with all of the other questions, we included a 'Don't know' option which was treated as incorrect.

Across the 18 countries we have included in the analysis here, just over half (52%) were able to correctly identify the public broadcaster.²⁵ This varies nationally, with higher figures in countries like the UK (73%), where the public broadcaster is by far the most widely used news source. Only 46% of respondents in the US correctly identified PBS. Across all countries, 15% of respondents incorrectly thought that various commercial TV news outlets or newspapers were not primarily funded by advertising. Around one-third (34%) said they did not know.

WHICH OF THE FOLLOWING NEWS OUTLETS DOES NOT PRIMARILY DEPEND ON ADVERTISING FOR FINANCIAL SUPPORT? – SELECTED MARKETS



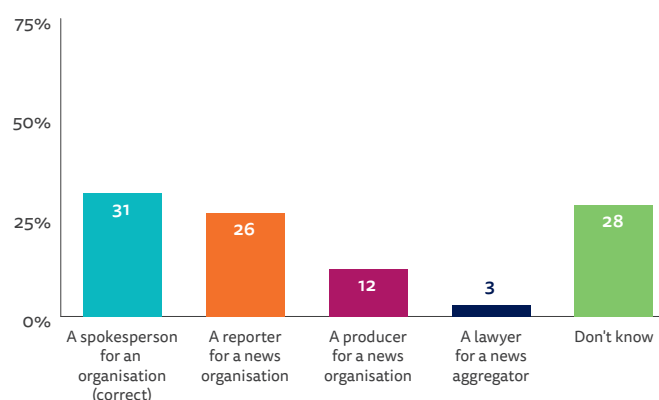
Q14_2018a. Which of the following news outlets does NOT depend primarily on advertising for financial support? Base: Total sample: Selected markets = 36911.

²³ <https://points.datasociety.net/you-think-you-want-media-literacy-do-you-7cad6af18ec2>

²⁴ The first two questions we used were adapted from the questions about media knowledge structures described here: Adam Maksl, Seth Ashley, and Stephanie Craft, 'Measuring News Media Literacy', *Journal of Media Literacy Education* 6(3) (2015): 29–45.

Our second question asked respondents who they thought was typically responsible for writing a press release. Just 31% of respondents across all countries were able to do this. This figure rises to nearly half in Sweden (45%) and Denmark (47%). Around a quarter across all countries incorrectly thought that they are written by journalists working for news organisations.

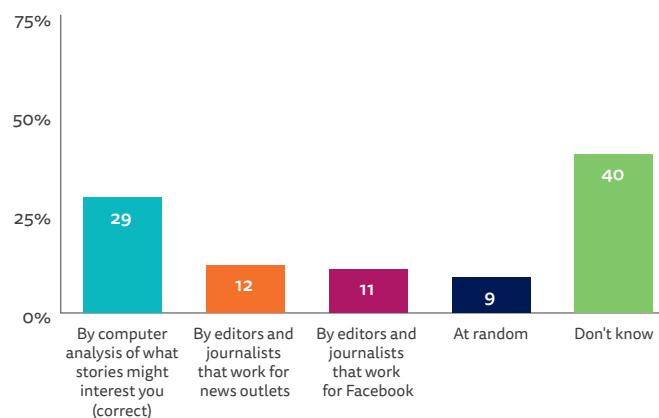
WHICH OF THE FOLLOWING IS TYPICALLY RESPONSIBLE FOR WRITING A PRESS RELEASE? – SELECTED MARKETS



Q14_2018b. Which of the following is typically responsible for writing a press release? Base: Total sample: Selected markets = 36911.

Our third question asked about how news is selected on social media, which as we have documented for several years has emerged as an important source of news for many people. Just under a third (29%) correctly stated that most of the individual decisions about news people see on Facebook are made by computer analysis of what stories might interest them. More than one in ten (12%) said that these decisions were made by journalists working for news organisations, with a similar number (11%) believing that Facebook employs journalists for this task. Just under one in ten (9%) thought the selection process was random.

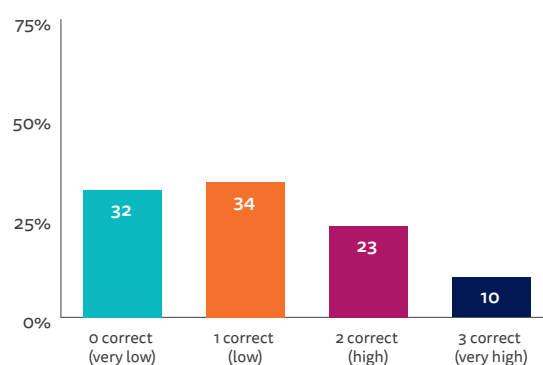
HOW ARE MOST OF THE INDIVIDUAL DECISIONS ABOUT WHAT NEWS STORIES TO SHOW PEOPLE ON FACEBOOK MADE? – SELECTED MARKETS



Q14_2018c. How are most of the individual decisions about what news stories to show people on Facebook made? Base: Total sample: Selected markets = 36911.

We can convert these responses into a news literacy scale. When we do this, we can see that news literacy is much lower than many within the news industry might like or expect. We can see that one-third (32%) did not get any of these questions correct. A similar number got just one correct – normally the first question on public broadcasters. Just 10% answered all three correctly. We've attached labels to each of these groups ranging from 'very low' to 'very high' to indicate how we think this translates into news literacy, and will use them throughout the rest of this section.

NEWS LITERACY SCALE BASED ON NUMBER OF CORRECT ANSWERS – SELECTED MARKETS



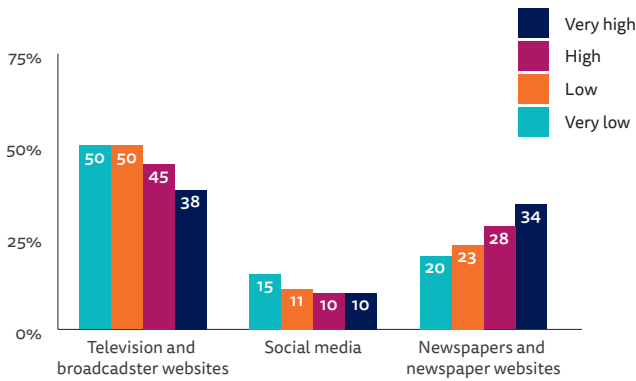
Q14_2018a_combined2. News literacy scale. Base: Total sample: Selected markets = 36911.

PEOPLE WITH HIGHER NEWS LITERACY PREFER NEWSPAPER BRANDS

In the remainder of this section, we will focus on how different levels of news literacy are related to different news diets. We start by looking at people's main source of news. In general, the preference for newspapers and newspaper websites (which we have grouped together here) is more widespread among those with higher levels of news literacy; rising from 20% to 34%. Conversely, the preference for television and television/radio websites is more widespread among those with low levels. The preference for social media as a news source is largely consistent across all groups, but is slightly higher among those with the lowest levels of news literacy (15% compared to 10%).

²⁵ Due to the difficulties associated with asking knowledge questions across different countries, we decided to focus this section on the Northern, Western and (most of the) Southern European markets within our sample, as well as the English-language markets from the rest of the world. The 18 markets included here and throughout the rest of this section were therefore: Sweden, Finland, Denmark, Norway, UK, Germany, USA, Switzerland, Netherlands, Australia, Spain, France, Canada, Austria, Belgium, Italy, Ireland, and Portugal.

MAIN SOURCE OF NEWS BY NEWS LITERACY – SELECTED MARKETS



Q14_2018a_combined2. News literacy scale. 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 with very low/low/high/very high news literacy who used a source of news in the last week: Selected markets = 11032/12383/8453/3882.

NEWS LITERACY AND NEWS BRANDS

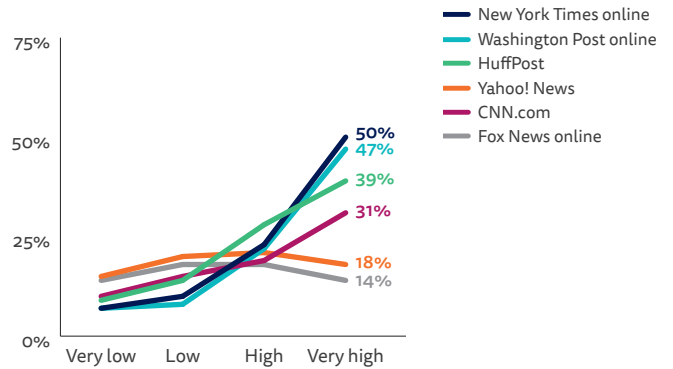
News literacy is also strongly associated with different news diets. Unsurprisingly, people with higher levels of news literacy tend to consume news from a wider range of sources. Thinking about online use only, people with the highest levels of literacy use on average roughly twice as many news brands each week as those with the lowest levels (4.22 compared to 2.39 across all markets).

The specific brands used by different groups also varies a lot in some countries. In US (and also Germany), lists of the most popular brands become inverted as news literacy rises. Yahoo! and Fox are the most popular news brands among those with the lowest levels of news literacy, but among those with the highest levels they are overtaken by brands like the *New York Times* and the *Washington Post*. This is highly likely to be due to differences in content. Importantly, Yahoo! and Fox are used by roughly similar numbers of people within each news literacy group, but the reason they fall behind is because certain other brands become much more popular as literacy rises.

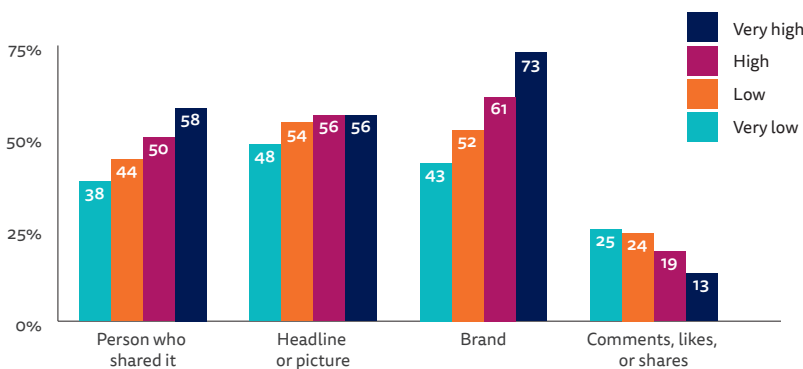
PEOPLE WITH HIGH LITERACY USE SOCIAL MEDIA DIFFERENTLY

Those with higher levels of news literacy may rely less on social media for news, but they appear to be more discerning when they do use it. When deciding whether to click through to a story, they are more likely to pay attention to a range of different credibility cues. Compared to those with lower levels of news literacy, they are more likely to say that the news brand, the headline, and the person who shared the story are important in deciding whether it is worth their time. The exception to this rule is the number of comments, likes, or shares, which is the least important cue across all groups, but is more important among those with the lowest level of news literacy. However, they are also less likely to share or comment on news themselves, so the simple idea that low-quality news is primarily spread by people with low news literacy may only be partly true.

WEEKLY REACH OF TOP ONLINE NEWS BRANDS BY NEWS LITERACY – USA



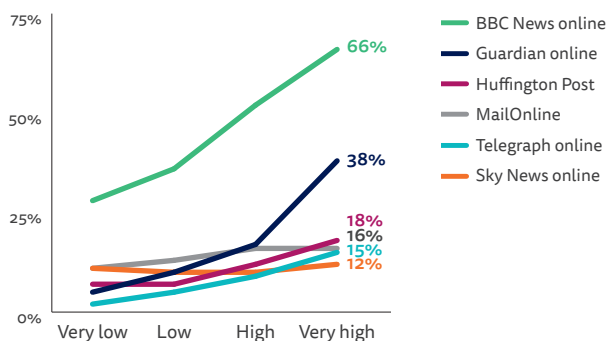
PROPORTION THAT AGREE EACH ATTRIBUTE IS IMPORTANT WHEN DECIDING TO CLICK THROUGH TO A NEWS STORY ON SOCIAL MEDIA BY NEWS LITERACY – SELECTED MARKETS



Q14_2018a_combined2. News literacy scale. Q12C_2018_1-4. Please indicate your level of agreement with the following statements. When looking at stories in social media, the news brand/headline or picture/person who shared the story/number of comments or shares is very important in helping me decide whether information is likely to be worth my time. Base: All with very low/low/high/very high news literacy who used a social network in the last week: Selected markets = 10274/11529/8027/3802.

We also see elements of this pattern in the UK. As in the US, people with higher levels of news literacy are more discerning, and have a (collective) sense of what brands are worth paying more attention to. Use of the *Guardian*, for example, rises sharply as literacy increases. But perhaps the key difference is that the same brand (BBC News online) is the most widely used across all levels of literacy.

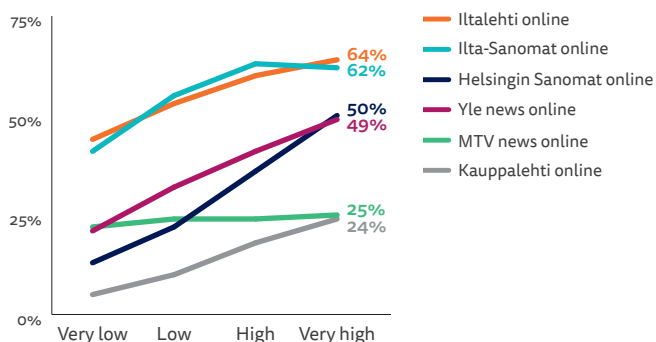
WEEKLY REACH OF TOP ONLINE NEWS BRANDS BY NEWS LITERACY - UK



Q14_2018a_combined2. News literacy scale. **Q5B.** Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of internet access)? Base: All with very low/low/high/very high news literacy: UK = 358/732/679/348.

Differences between brands appear to be less important in the Nordic countries. Here, people’s news diets tend to be similar across different levels of news literacy, with most brands becoming consistently more popular as literacy rises, and the rank order remaining largely the same. This is likely to be due to similarities in terms of tone and coverage across most brands. The exception to this rule is commercial television news, such as MTV in Finland and TV2 in Norway. They do not become more popular as literacy rises.

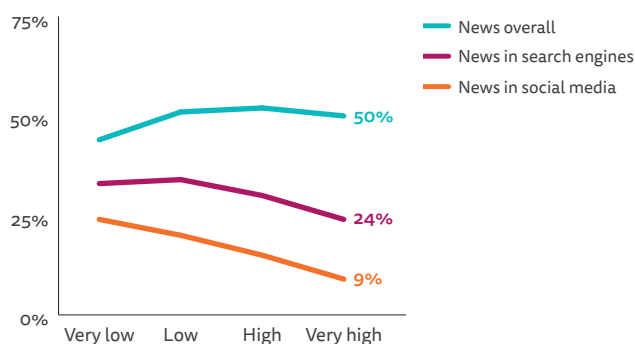
WEEKLY REACH OF TOP ONLINE NEWS BRANDS BY NEWS LITERACY - FINLAND



COMPLEX RELATIONSHIP BETWEEN TRUST AND NEWS LITERACY

Finally, we consider the relationship between trust and news literacy. Many people hope that increasing overall levels of news literacy will reverse the decline in news trust we see in many countries. This sounds like a reasonable assumption, but as we suggested at the beginning of this section, news literacy may also go hand in hand with a high degree of scepticism. Even if we focus on news production, the more people know about how the news is made, the more knowledgeable they will be about its limitations and imperfections. This may be why we see only a very small increase in trust levels as news literacy increases.

PROPORTION THAT TRUST NEWS FROM DIFFERENT SOURCES BY NEWS LITERACY - SELECTED MARKETS



We also see that trust in news from search engines and news from social media becomes less widespread as news literacy increases. One possible reason for this may be that those with high news literacy are better able to use credibility cues to identify untrustworthy news on search and social. But it may also be because much of the discussion about the impact of algorithmically-driven platforms has so far focused on the risks, with terms like ‘echo chamber’ and ‘filter bubble’ starting to enter the vernacular.

These discussions are important, but we should not lose sight of some of the potential benefits highlighted by academic research. The use of social media for news has been associated with more diverse news diets, increases in political participation, and modest depolarisation of political attitudes.²⁶ As search engines and social media become more important to the news ecosystem, any attempt to raise news literacy should also aim to improve the knowledge of both the positive and negative outcomes.

²⁶ Richard Fletcher and Rasmus Kleis Nielsen, ‘Are People Incidentally Exposed to News on Social Media? A Comparative Analysis’, *New Media and Society*, 0(0) (2017): 1–19; Augusto Valeriani and Cristian Vaccari, ‘Accidental Exposure to Politics on Social Media as Online Participation Equalizer in Germany, Italy, and the United Kingdom’, *New Media and Society*, 18(9) (2016): 1857–74; Michael A. Beam, Myiah J. Hutchens, and Jay D. Hmielowski, ‘Facebook News and (De)Polarization: Reinforcing Spirals in the 2016 US Election’, *Information, Communication and Society*, 21(7) (2018): 940–58.

2.2 Misinformation and Disinformation Unpacked

Richard Fletcher

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The global debate over so-called ‘fake news’ has changed a lot in the last year. What began as concern over the narrow problem of completely made-up news stories has since sparked a renewed interest in the much broader issue of online misinformation.

In a sense, the debate has gone full circle, with some of the most active participants now urging people to abandon the term ‘fake news’ to allow the broader issues to be discussed, and to disarm politicians and other powerful people that seek to ‘weaponise’ the term for their own ends.²⁷

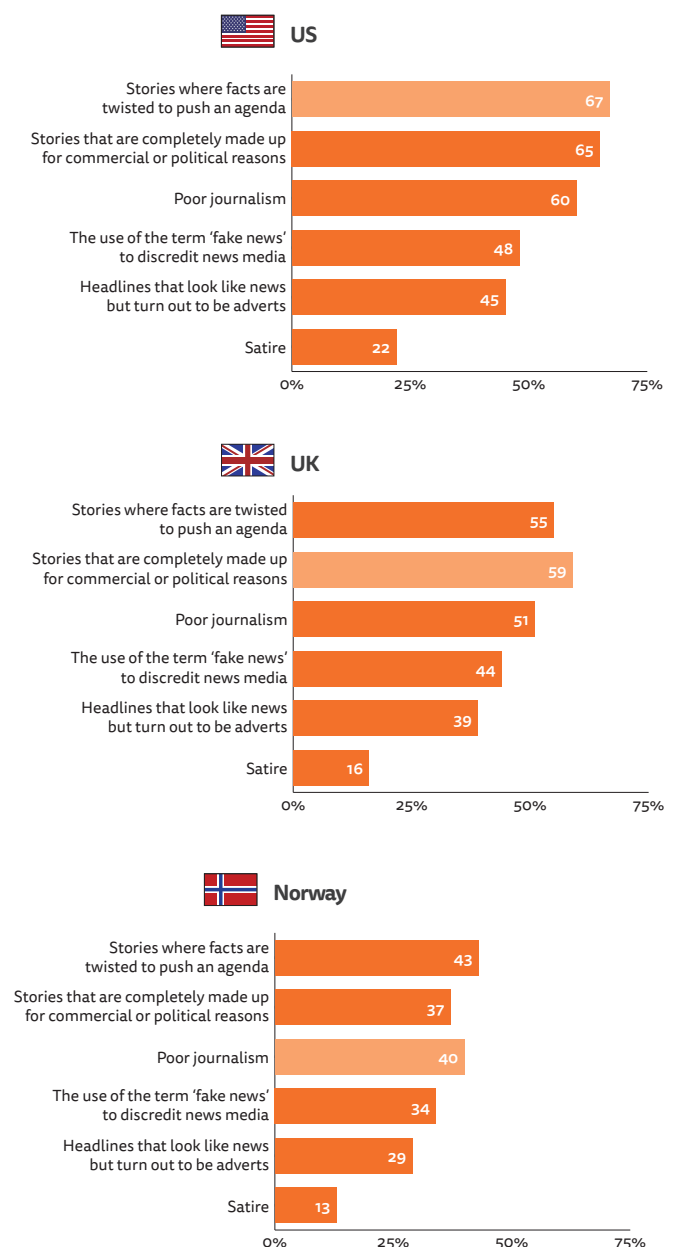
In this section we take a more global look at what is often incorrectly perceived as an American problem. We measure ‘concern over’ and ‘exposure to’ multiple forms of misinformation, and look at how both vary across countries. Based on how audiences perceive the problem, we consider different types of what our previous audience research suggests ordinary media users consider misinformation, including some content produced by the journalistic profession, as well as content produced outside.²⁸ We also consider possible responses to the problem of misinformation, and uncover which of these audiences would most like to see.

SOME NATIONAL VARIATION IN CONCERN OVER DIFFERENT TYPES OF MISINFORMATION

In the Executive Summary we described how, across all markets, concern over completely made-up news is often matched by concern over practices that have been partially legitimised by some in the journalistic profession.

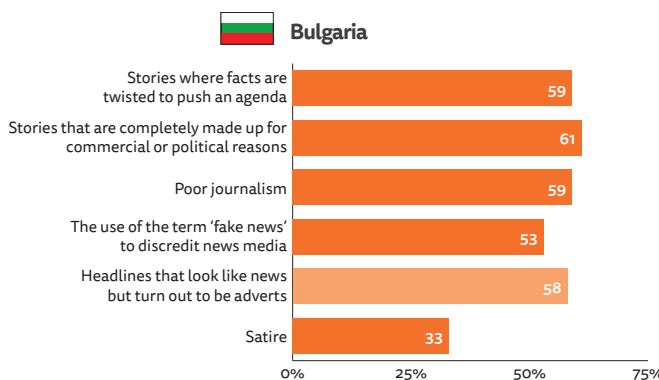
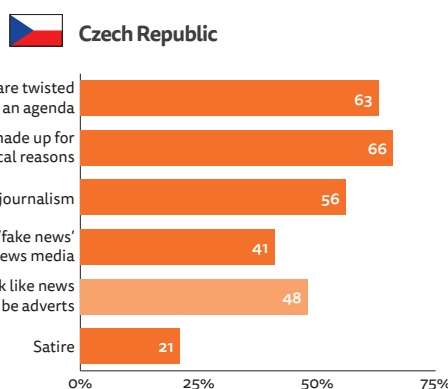
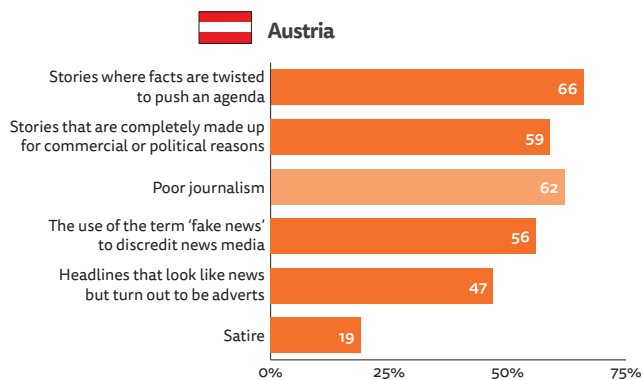
This global picture remains fairly consistent when we drill down into individual countries. In the USA and the UK, the pattern is similar, with the either completely made-up stories or journalistic spin attracting the most widespread concern. But there are also some notable national differences. In some European countries, such as Norway and Austria, poor journalism is more concerning than completely made-up stories (notice also that concern over all types is low in Norway), perhaps due to a stronger tradition of objective reporting. Concern over the misuse of the term ‘fake news’ is also high in countries like the USA and Austria, where politicians have been using it to denigrate the news media in recent years. Concern over headlines that turn out to be adverts is more widespread than average in Bulgaria and the Czech Republic. However, it is unclear whether this concern reflects differences in content.

PROPORTION WHO ARE VERY OR EXTREMELY CONCERNED ABOUT EACH TYPE OF MISINFORMATION



²⁷ <https://firstdraftnews.com:443/fake-news-complicated>

²⁸ Rasmus Kleis Nielsen and Lucas Graves, ‘News You Don’t Believe’: Audience Perspectives on ‘Fake News’. Oxford: RISJ, 2017.



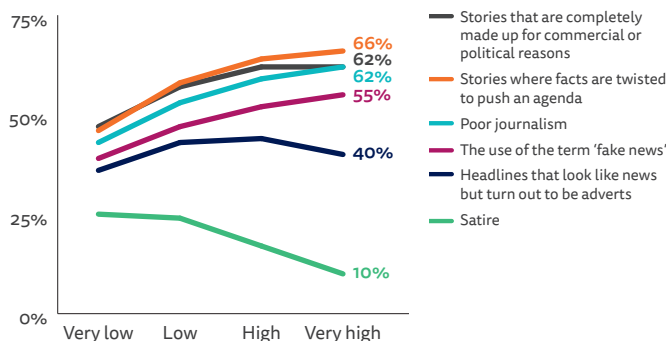
Q_FAKE_NEWS_2_1-6. To what extent, if at all, are you concerned about the following. Base: Total sample in each country.

CONCERN GREATER AMONGST THE WELL-INFORMED

Perhaps unsurprisingly, concern over misinformation is generally greater among those with higher levels of interest in the news and lower levels of trust. Looking at how the data break down by different levels of news literacy is interesting, however, because it shows how concern goes up in line with literacy in some cases (made-up stories, spin, and poor journalism) but down in the case of satire.²⁹

This is likely to be because those with higher levels of news literacy feel they are more likely to be able to spot satirical stories, and also have a clearer sense of what they should be concerned about. However, the data also throw doubt on the possible impact of attempts to increase news literacy, given that they suggest that an increase might lead people to be less trusting of some journalistic work.

PROPORTION WHO ARE VERY OR EXTREMELY CONCERNED ABOUT EACH TYPE OF MISINFORMATION BY NEWS LITERACY – SELECTED MARKETS

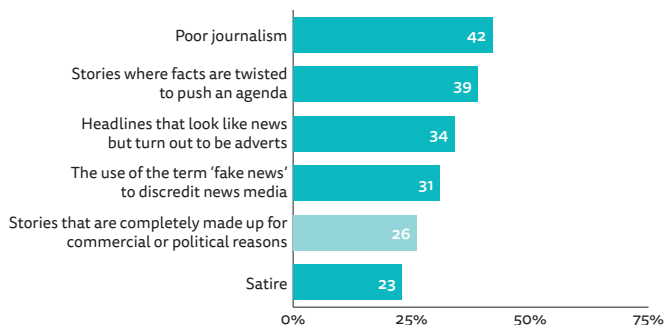


Q14_2018a_combined2. News literacy scale. **Q_FAKE_NEWS_2_1-6.** To what extent, if at all, are you concerned about the following. Base: All with very low/low/high/very high news literacy: Selected markets = 11841/12625/8538/3910.

EXPOSURE TO COMPLETELY MADE-UP NEWS IS LOW

This year we also measured people's self-reported exposure to the different forms of misinformation people express concern over (not all of them are necessarily equally worrying). Clearly, exposure is much harder to measure than concern, because in some cases it relies on people's ability to correctly identify information that has been deliberately designed to be misleading, and because what exactly constitutes misinformation is partly subjective. Even with this in mind, it is striking that, although concern over completely made-up news is high, self-reported exposure across all markets is relatively low (26%); considerably lower than exposure to poor journalism (42%) and spin (39%).

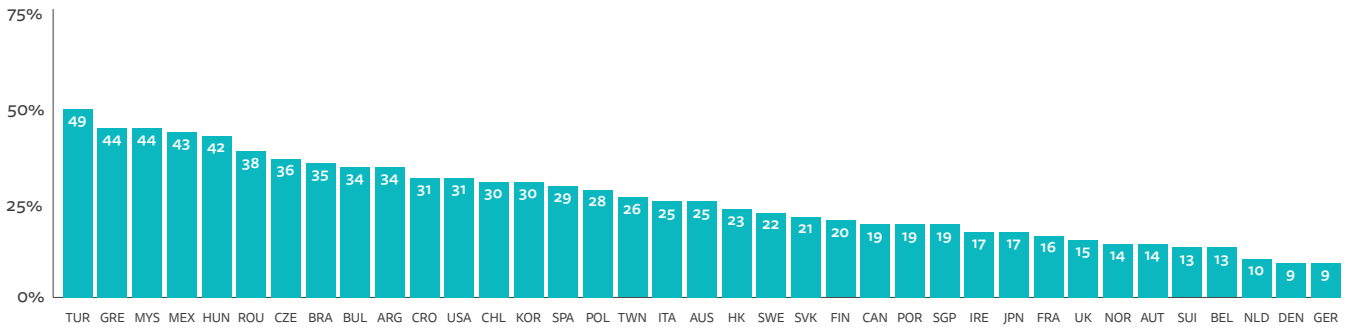
PROPORTION WHO WERE EXPOSED TO EACH TYPE OF MISINFORMATION IN THE LAST WEEK – ALL MARKETS



Q_FAKE_NEWS_3. In the LAST WEEK which of the following have you personally come across? Base: Total sample in all markets.

²⁹ See Section 2.1, The Impact of Greater News Literacy, for an explanation of how we measured news literacy.

PROPORTION WHO SAY THEY WERE EXPOSED TO COMPLETELY MADE-UP NEWS IN THE LAST WEEK – ALL MARKETS



Q_FAKE_NEWS_3. In the LAST WEEK which of the following have you personally come across? Stories that are completely made-up for political or commercial reasons. Base: Total sample in all markets.

EXPOSURE TO MADE-UP NEWS IS HIGHER THAN THE US IN SOME COUNTRIES

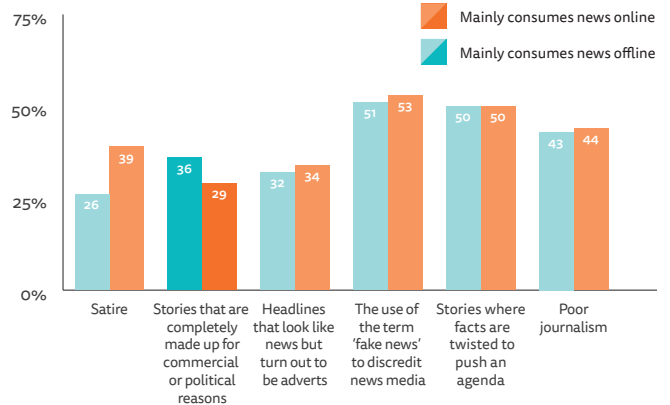
Considering exposure to completely made-up news stories, the figure in the US is high at 31%, but exposure is even more widespread in Eastern European countries like Hungary (42%) and Romania (38%), and Mediterranean countries like Greece (44%) and Turkey (49%). In the UK, the figure is 15%, and lower still in other Northern and Western European countries like Germany (9%), Denmark (9%), and the Netherlands (10%). In these countries, exposure to completely made-up news stories is typically less widespread than all of the other forms of misinformation we asked about.

More striking still is that, in the US, self-reported exposure to completely made-up news stories is actually more widespread among those that mainly consume news offline (36%, compared to 29% for those that mainly consume news online). When we dig deeper into the data we see that this is mainly due to right-wingers that consume a lot of 24-hour TV news. This suggests that people are encountering left-leaning TV news and concluding that many of the stories they see are made up – something potentially exacerbated by the lack of overlap in content between left- and right-wing media.

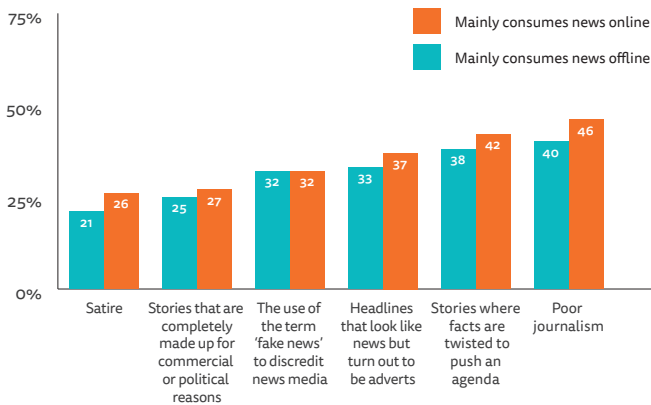
MISINFORMATION IS AN OFFLINE PROBLEM TOO

Many people instinctively think of misinformation as an online problem, but all of our categories can be found offline too. It is striking that there is little difference in self-reported exposure to misinformation between those that mainly consume news offline and those that mainly consume news online (though in most cases exposure online is slightly higher). This runs counter to the frequent tendency in public discussions to associate misinformation with online media.

PROPORTION WHO SAY THEY WERE EXPOSED TO EACH TYPE OF MISINFORMATION BY MAIN SOURCE OF NEWS – US



PROPORTION WHO WERE EXPOSED TO EACH TYPE OF MISINFORMATION IN THE LAST WEEK BY MAIN SOURCE OF NEWS – ALL MARKETS



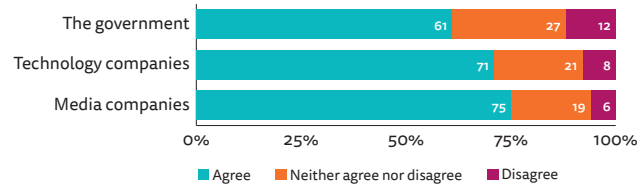
Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news? **Q_FAKE_NEWS_3.** In the LAST WEEK which of the following have you personally come across? Base: All that mainly consume news offline/online: US = 1131/1115.

Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news? **Q_FAKE_NEWS_3.** In the LAST WEEK which of the following have you personally come across? Base: All that mainly consume news offline/online: All markets = 39595/32567.

PEOPLE WANT TO SEE ACTION TO COMBAT MISINFORMATION

Given that concern over misinformation when it comes to news is high, it's not surprising that most people think that media companies, technology companies, and government should all do more to combat it. Across the 23 markets where we asked this question, three-quarters (75%) agreed that media companies should do more to separate what is real and what is fake on the internet.³⁰ The figure was slightly lower (71%) for technology companies like Facebook and Google. Just under two-thirds (61%) said government should do more.

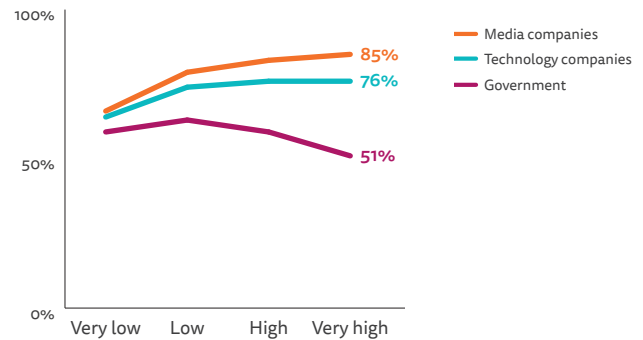
PROPORTION WHO AGREE THAT EACH SHOULD DO MORE TO SEPARATE WHAT IS REAL AND WHAT IS FAKE ON THE INTERNET – SELECTED MARKETS



Q_FAKE_NEWS_4_2_1-3. Please indicate your agreement with the following statements. Technology companies/media companies/the government should do more to make it easier to separate what is real and fake on the internet. Base: Total sample: Selected markets = 46010.

Echoes of this view can be found across all countries when we consider news literacy. Support for action by technology and media companies rises among those with high news literacy, but starts to drop again in the case of government intervention. This may be because people with high news literacy are more sensitive to the risks of over-regulation and the consequences for free speech.

PROPORTION WHO AGREE THAT EACH SHOULD DO MORE TO SEPARATE WHAT IS REAL AND WHAT IS FAKE ON THE INTERNET BY NEWS LITERACY – SELECTED MARKETS

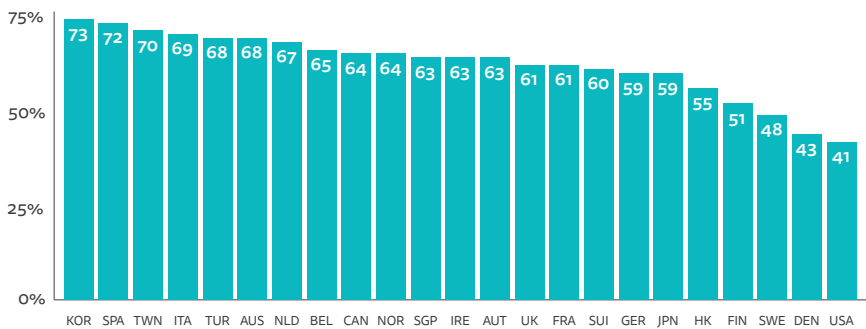


Q14_2018a_combined2. News literacy scale. **Q_FAKE_NEWS_4_2_1-3.** Please indicate your agreement with the following statements. Technology companies/media companies/the government should do more to make it easier to separate what is real and fake on the internet. Base: All with very low/low/high/very high news literacy: Selected markets = 11149/11898/8069/3790.

PEOPLE ARE CAUTIOUS ABOUT GOVERNMENT INTERVENTION

Views about whether media or technology companies should do more are fairly consistent across countries, but as we described in the Executive Summary, we do see variation in terms of views about government intervention. Over 70% in Spain and South Korea think that the government should do more, but the figure drops below half in Sweden (48%) and Denmark (43%). The figure is lowest of all in the US (41%), perhaps because of a strong commitment to the First Amendment and freedom of speech.

PROPORTION WHO AGREE THAT GOVERNMENT SHOULD DO MORE TO SEPARATE WHAT IS REAL AND WHAT IS FAKE ON THE INTERNET – SELECTED MARKETS



Q_FAKE_NEWS_4_2_3. Please indicate your agreement with the following statements. The government should do more to make it easier to separate what is real and fake on the internet. Base: Total sample in each market.

³⁰ These questions were asked in UK, USA, Germany, France, Italy, Spain, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Turkey, Japan, South Korea, Taiwan, Hong Kong, Singapore, Australia, Canada.

2.3 Which Brands Do We Trust and Why?

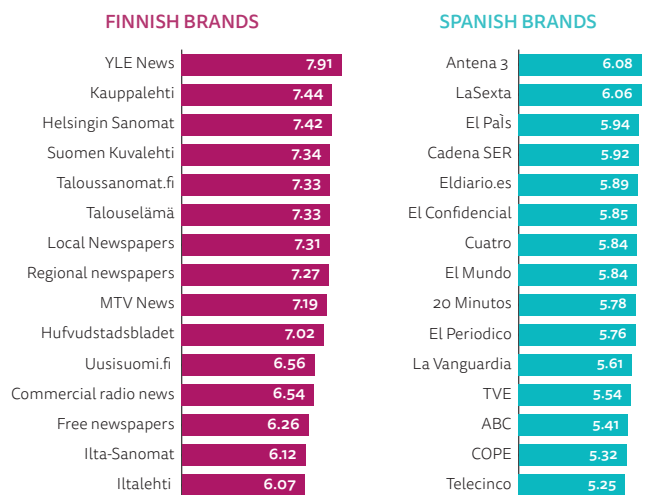
Antonis Kalogeropoulos
 Research Fellow, Reuters Institute
 for the Study of Journalism

This year, as well as general trust in news, we have explored the trust that news users place in specific brands. Brand trust is particularly interesting given that Facebook announced that it will prioritise news 'from publications that the community rates as trustworthy',³¹ using an online survey.

In our report this year we have taken a similar approach to understanding news brand trust. We asked our survey respondents to indicate their trust in selected news brands, on a scale of 0 (completely untrustworthy) to 10 (completely trustworthy). They also had the option of choosing 'I have not heard of this brand'. The trust scores reported below are calculated after excluding those who claimed not to have heard of the brand in question. Our calculations include all respondents, regardless of whether they use Facebook or not. However, the scores produced by Facebook users are very similar to the overall figures.³² First, as seen in the chart on the right, we observe large variations in brand trust from country to country. Even the lowest ranked Finnish news brands included in this study score higher than almost all Spanish news brands.

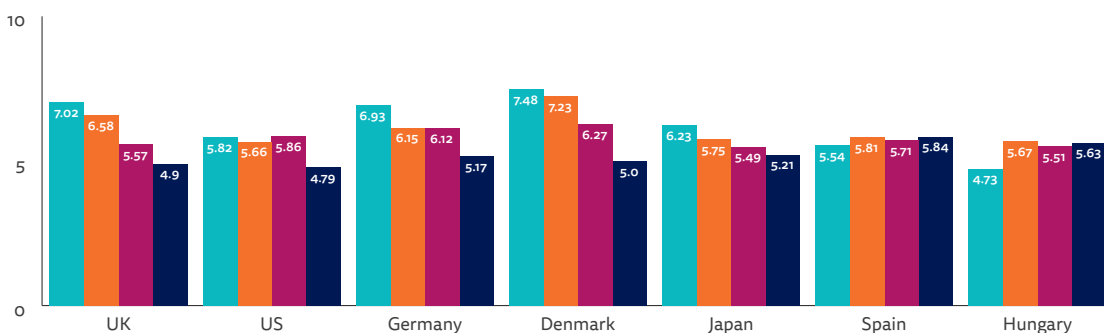
We also find that across a number of countries news brand trust differs by type. In the UK, Germany, Denmark, Italy, and Japan, the public service broadcaster is the most trusted type of brand. This is not the case in Spain, where TVE is one of the least trusted brands of those we asked about (5.54 average trust). Spain is also an outlier when it comes to trust in digital-born brands. While in every other country people tend to trust digital-born outlets less, in Spain they are trusted more on average (led by Eldiario.es with 5.89 average trust). This is partly because of the low trust for traditional brands and partly because many digital brands in Spain were started by well-known journalists with a strong track record.

AVERAGE LEVEL OF TRUST IN SELECTED NEWS BRANDS – FINLAND AND SPAIN



Q6_2018. How trustworthy would you say news from the following brands is? Use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Total sample in each market. Note: People who indicated that they have not heard of a brand were excluded.

AVERAGE LEVEL OF TRUST IN SELECTED NEWS BRANDS WITHIN EACH TYPE – SELECTED MARKETS



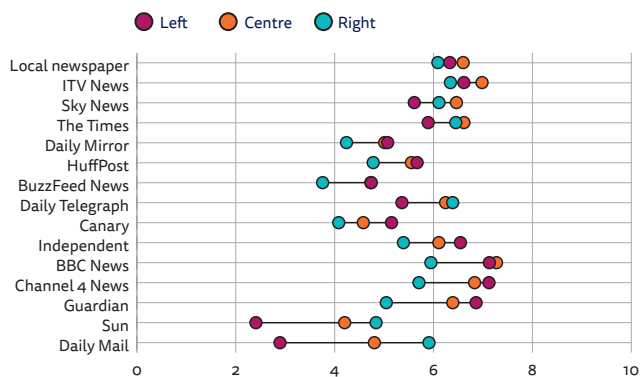
- PSB
- Commercial TV
- Print
- Digital born

Q6_2018. How trustworthy would you say news from the following brands is? Use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Total sample in each market. Note: People who indicated that they have not heard of a brand were excluded.

³¹ As announced on Facebook: <https://newsroom.fb.com/news/2018/01/trusted-sources>. It was later reported that Facebook's survey contains two questions: 'Do you recognize the following websites?' and 'How much do you trust each of these domains?' (answered in a 1–5 scale from 'Entirely' to 'Not at all') https://www.buzzfeed.com/alexkantrowitz/this-is-facebooks-news-survey?utm_term=.kkyo8GjeqZ#.babvn4mM1k

³² In this survey, we asked for a number of news brands in each country. The list of news brands included TV, print, and digital-born outlets.

AVERAGE LEVEL OF TRUST IN SELECTED NEWS BRANDS BY POLITICAL LEANING - UK

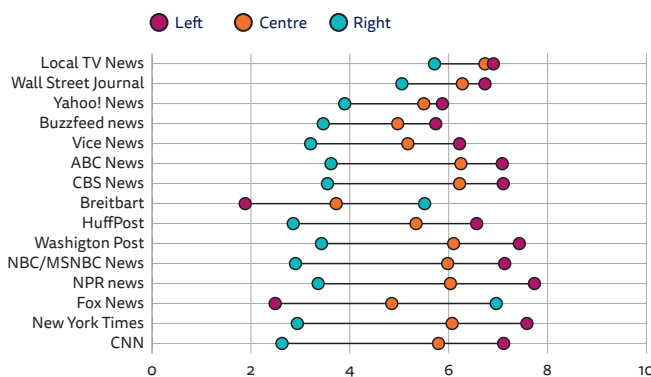


Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q6_2018.** How trustworthy would you say news from the following brands is? Use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Left/Centre/Right: UK = 523/1021/292. Note: People who indicated that they have not heard of a brand were excluded.

In many countries we see differences in brand trust according to different political leanings. This is particularly the case in the United States, which as we have previously shown in our 2017 report has some of the most polarised news audiences in the world. Right-leaning respondents (marked in blue on the chart) strongly distrust many of the news brands we asked about with scores around 3/10 for many legacy American news outlets such as MSNBC, the *New York Times*, and the *Washington Post*. Left-leaning respondents show similarly low levels of distrust in two brands, Fox News and Breitbart.

The least polarising brands in the US are local TV news, the *Wall Street Journal*, and Yahoo! News. Local news tends to be less affected by the bitter national polarised political debates while Yahoo! News follows a relatively neutral fact-based approach and partly relies on news agencies. For almost all other brands, the differences are staggeringly large – the biggest gap is for CNN (7.08/10 for those on the left side of the political spectrum, and 2.4 for those on the right). These differences reflect the current political rhetoric from the right. President Trump has repeatedly accused CNN, the *New York Times*, *Washington Post*, NBC, and other brands of being biased and 'fake news',³³ while repeatedly praising Fox News (particularly morning shows like *Fox and Friends*).³⁴

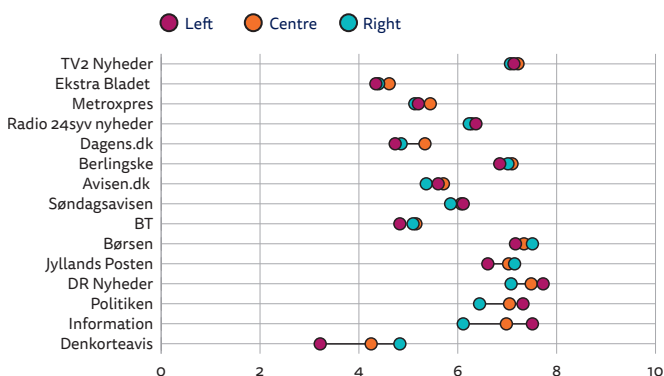
AVERAGE LEVEL OF TRUST IN SELECTED NEWS BRANDS BY POLITICAL LEANING - USA



Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q6_2018.** How trustworthy would you say news from the following brands is? Use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Left/Centre/Right: US = 567/970/550. Note: People who indicated that they have not heard of a brand were excluded.

An example of a less polarised country in terms of news brand trust is Denmark. While there are strong differences for brands like the right-wing digital-born website *Denkorteavis* (trusted more by those on the right) and *Information* (trusted more by those on the left), these gaps are much smaller than polarised outlets in the US. In the UK, polarisation in terms of news brand trust is higher than in Denmark, but still low compared to the US. The most polarised brands in the UK are the two most popular tabloids that are trusted more by those on the right (the *Sun* and the *Mail*), followed by the left-leaning *Guardian* which shows the reverse pattern.

AVERAGE LEVEL OF TRUST IN SELECTED NEWS BRANDS BY POLITICAL LEANING - DENMARK

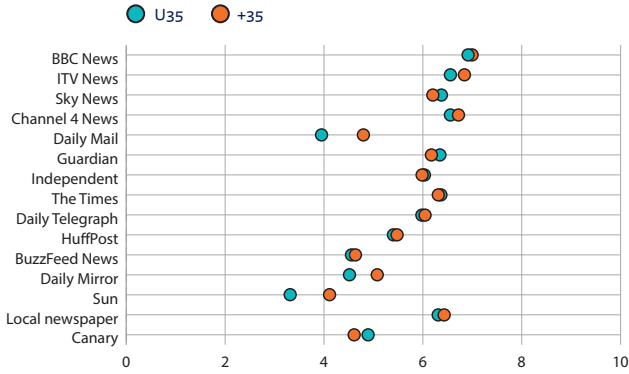


Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q6_2018.** How trustworthy would you say news from the following brands is? Use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Left/Centre/Right: Denmark = 348/1113/353. Note: People who indicated that they have not heard of a brand were excluded.

³³ For instance: <https://www.bloomberg.com/news/articles/2018-01-18/trump-unveils-fake-news-awards-as-senators-decry-press-attacks>
³⁴ <https://www.vox.com/2018/2/9/16997022/strikethrough-trump-fox-friends-feedback-loop-explained-tweet>

When looking at differences in brand trust by age, we can see that in the UK people under and over 35 show similar levels of trust for all brands, with the exception of the three tabloid/mid-market brands – the *Daily Mail*, *Daily Mirror*, and the *Sun* – which are more trusted by those over 35. Old-style tabloids may need to change their tone or style to win the trust of younger audiences. It is interesting to note that news brands that are specifically geared towards younger audiences (e.g. BuzzFeed) are equally trusted by young and old.

AVERAGE LEVEL OF TRUST IN SELECTED NEWS BRANDS BY AGE – UK



Q6_2018. How trustworthy would you say news from the following brands is? Use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Total sample in each market. Note: People who indicated that they have not heard of a brand were excluded.

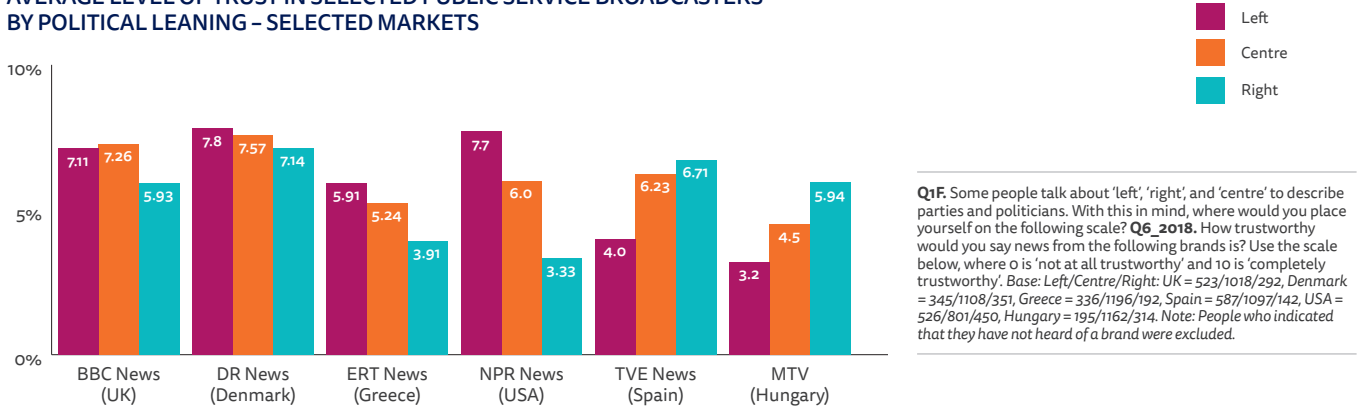
We have also examined differences in trust for public service broadcasters. In countries like Denmark, and to some extent the UK, the differences by political leaning are small (though perhaps not as small as the PSBs would like). In Greece, Hungary, and in Spain, however, trust in public broadcasting is compromised by perceived government interference in editorial decisions or appointments. In these countries PSB trust is lower in general but is very unevenly distributed between left and right.

In the United States, National Public Radio generates most of its funding directly from its predominantly liberal audience and the greater trust scores from the left reflect that reality.

CONCLUSIONS

This analysis shows that some brands are trusted much more than others but also underlines how strongly trust can be influenced by pre-existing views about politics. It also suggests that traditional brands with a long track record may have an advantage over digital-born brands and tabloids, even though these also frequently produce high-quality and accessible journalism, as Facebook starts to implement brand trust scores into its algorithms. These findings underline the difficulties in determining which brands should be promoted or demoted as tech companies look to find sustainable solutions to the problems of unreliable news and misinformation.

AVERAGE LEVEL OF TRUST IN SELECTED PUBLIC SERVICE BROADCASTERS BY POLITICAL LEANING – SELECTED MARKETS



Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q6_2018.** How trustworthy would you say news from the following brands is? Use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. Base: Left/Centre/Right: UK = 523/1018/292, Denmark = 345/1108/351, Greece = 336/1196/192, Spain = 587/1097/142, USA = 526/801/450, Hungary = 195/1162/314. Note: People who indicated that they have not heard of a brand were excluded.

2.4 Who Uses Alternative and Partisan Brands?

Nic Newman and Antonis Kalogeropoulos
Reuters Institute for the Study of Journalism

In this section, we look in more detail at who uses alternative and partisan websites in different countries. We have defined these as websites or blogs with a political or ideological agenda with a user base that tends to share these often partisan views. Most were created relatively recently and are mainly distributed through social media. The motivation may not be purely political as there may also be a strong business opportunity in focusing on these topics. The narrowness of their focus also separates them from some established news sites, which may also have a reputation for partisan political coverage.

We have worked with partners in ten European countries to identify a number of sites that fit these criteria and then to measure usage via our survey. Across these sites, net usage and awareness was higher in Spain, Poland, the Czech Republic, and Sweden, but lower in Austria, Finland, Germany, and the UK.

In this chapter we explore the profile of the users of these sites including demographic breakdown and political orientation. Using open-ended survey responses we also hear more about the motivations people have for using these websites.

HOW PARTISAN ARE THESE WEBSITES?

To examine whether the users of alternative and partisan websites are on the left or the right of the political spectrum, we asked all respondents to self-identify their political views and then we combined these data with the online sources they use to create the audience maps seen below. An outlet appears to the

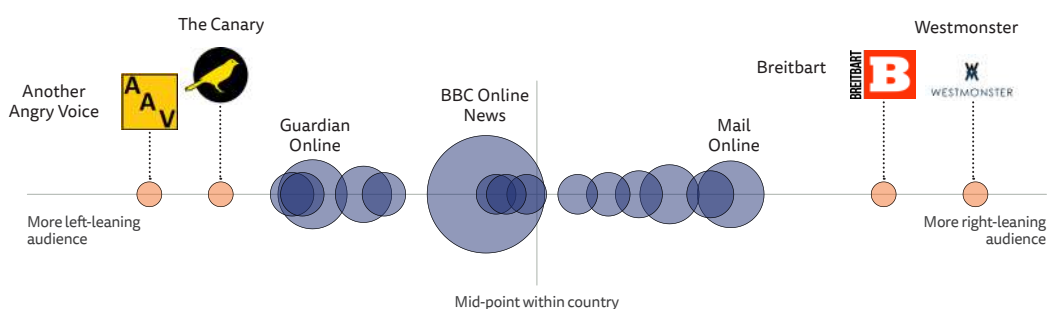
left of the mid-point if it has an audience that contains a higher proportion of left-leaning people than the sample as a whole.

In the UK, the Another Angry Voice blog and the Canary website are placed further to the left of the map, because a high proportion of their users self-identify on the left. By contrast users of Breitbart UK and of the Brexit supporting Westmonster are further to the right of the map, because the majority of the users of these sites self-identify on the right.

In the US, the users of the right-wing websites Breitbart, The Daily Caller, and InfoWars have an audience profile that is much further to the right than other websites (with the exception of Fox News). Occupy Democrats' audience is at the left side of the political spectrum, close to other outlets with predominantly left-wing audiences like NPR and Huffington Post.

In Sweden, the audience of Fria Tider, Nyheter Idag, and Ledarsidorna are further to the right of the audience of the top 15 news brands. Academic research shows that these sites tend to come from a right-wing position and present themselves as alternatives to the legacy media, who they perceive as censoring critical information on issues such as immigration.³⁵ In Austria, we also see that users of the far-right Unzensuriert (Uncensored), founded by a former Freedom Party (FPÖ) official, are furthest to the right of the audience map while Kontrast.at, a news blog run by the parliamentary club of the social-democratic party SPÖ, also pushed through social media channels, is more on the left side of our audience map.³⁶

AUDIENCE MAPS FOR THE TOP 15 ONLINE NEWS SOURCES AND SELECTED ALTERNATIVE OR PARTISAN BRANDS – UK

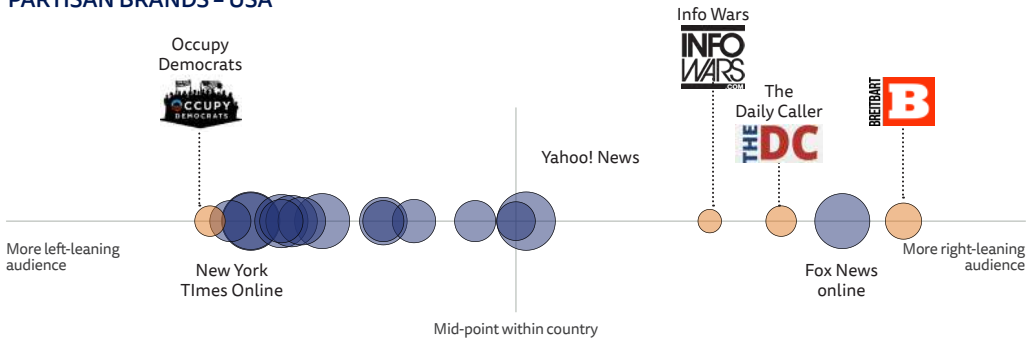


Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale?
Q5b. Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of internet access)?
Q5c_2018_2. Which, if any, of the following have you used to access news in the last week? Base: Total sample in each market. Note: Those who answered don't know to Q1F were excluded.

³⁵ K. Holt, 'Journalistik bortom redaktionerna?' in *SOU 2016:30 Människorna, medierna, marknaden* (pp. 403–428). Stockholm: Wolter Kluwers, 2016. See also Dagens Nyheter investigation into these sites that it says share criticisms of Sweden's immigration policy and contempt for the established media. <https://www.dn.se/nyheter/sverige/brottsdomda-nolltaxerare-och-jagade-av-kronofogden/>

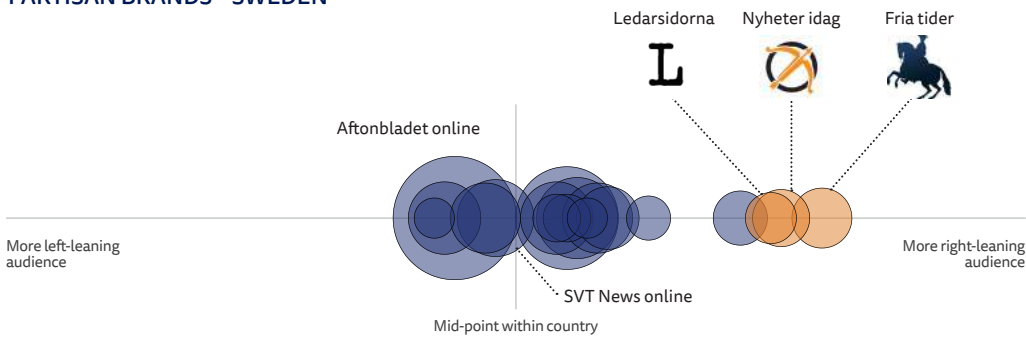
³⁶ ORF News discusses SPO's blogs and Facebook strategy, 7 July 2017, accessed Apr. 2018. <https://oe1.orf.at/artikel/635301>

AUDIENCE MAPS FOR THE TOP 15 ONLINE NEWS SOURCES AND SELECTED ALTERNATIVE OR PARTISAN BRANDS – USA

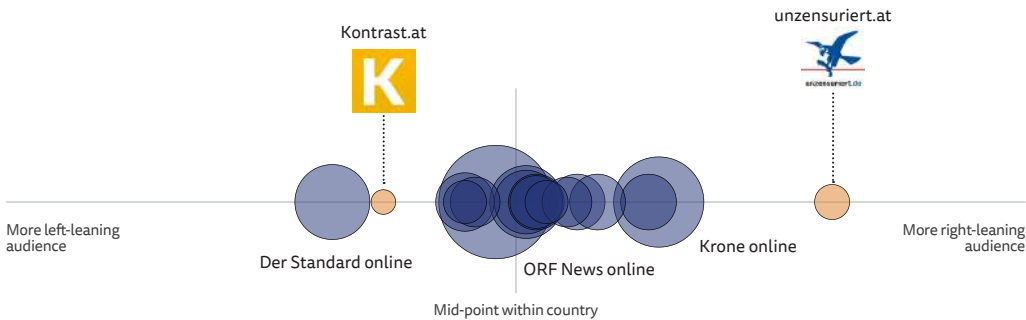


Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale?
 Q5b. Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of internet access)?
 Q5c_2018_2. Which, if any, of the following have you used to access news in the last week? Base: Total sample in each market. Note: Those who answered don't know to Q1F were excluded.

AUDIENCE MAPS FOR THE TOP 15 ONLINE NEWS SOURCES AND SELECTED ALTERNATIVE OR PARTISAN BRANDS – SWEDEN



AUDIENCE MAPS FOR THE TOP 15 ONLINE NEWS SOURCES AND SELECTED ALTERNATIVE OR PARTISAN BRANDS – AUSTRIA



These maps show that these new websites and blogs have given voice to views that previously may have been unrepresented in the media, but they also show the difficulties in classifying partisan sites. We find traditional media sites, like Fox News and some UK newspapers, also talking to partisan audiences even if they cover a much wider range of news beyond politics.

In other countries we find that these sites often speak to different kinds of divisions that are not fully captured by a traditional left-right spectrum. Often we find sites on the both left and the right sharing a common anti-immigration and anti-establishment agenda.

Further complicating the situation, in some Central and Eastern European countries the government itself also engages in populist narratives, which are covered by sympathetic (or more directly controlled) traditional media outlets. Here the divisions between traditional and partisan brands may blur compared with the examples on the maps above. In Poland, for example, the mainstream public broadcaster TVP, which has an editorial line that supports the ruling Law and Justice party,³⁷ appears in a similar position on our map to PolskaNiepodległa.pl (Independent Poland) a right-wing nationalist site created in 2013. Recent headlines from this publication include 'Islam is violence and rape', 'Poland for Poles', and 'German arrogance on the rise'.³⁸ Another

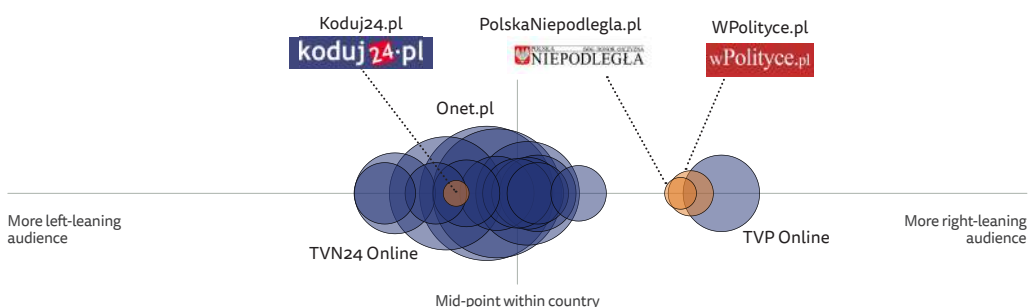
³⁷ Reporters Without Borders World Freedom Index 2017 report says that controversial reforms carried out by Poland's ultra-conservative Law and Justice government since late 2015 include bringing public radio and TV broadcasters under its control, replacing their directors, and turning them into propaganda outlets. <https://rsf.org/en/journalism-weakened-democracys-erosion>

³⁸ <http://www.digitalnewsreport.org/wp-content/uploads/2018/05/Recent-covers-from-Polska-Niepodlegla.pdf>

site with a partisan audience is WPolityce.pl, which is at the centre of a number of sites (and a TV station) that are supportive of the Law and Justice party and its policies. By contrast, Koduj24.pl is a liberal news website launched in 2016 by a former public radio editor as an official news service of Komitet Obrony Demokracji, or the Committee for the Defence of Democracy, one of the major opposition organisations in Poland that recently mobilised thousands of people to demonstrate in defence of the constitutional tribunal and the judiciary.³⁹

What users of most of these websites have in common is low trust in news, compared to the total sample in their countries. Fewer users of Breitbart in the US show trust in news (13%) compared to the country average (34%). And the same is true for users of anti-immigration and right-wing sites Unzensuriert in Austria and Fria Tider and Nyheter Idag in Sweden, when compared to national averages. By contrast some left-leaning partisan sites like Occupy Democrats have much higher trust levels (56%) than the average, in common with other left-wingers in the United States.

AUDIENCE MAPS FOR THE TOP 15 ONLINE NEWS SOURCES AND SELECTED ALTERNATIVE OR PARTISAN BRANDS – POLAND



Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale?
Q5b. Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of internet access)?
Q5c_2018_2. Which, if any, of the following have you used to access news in the last week? Base: Total sample in each market. Note: Those who answered don't know to Q1F were excluded.

MOTIVATIONS FOR USE

When asked about motivations for using these websites on an open-ended form in the survey, most respondents talked about their distrust of – or lack of respect for – mainstream media (MSM). In the US, right-wing respondents used similar language to that adopted by the US president.

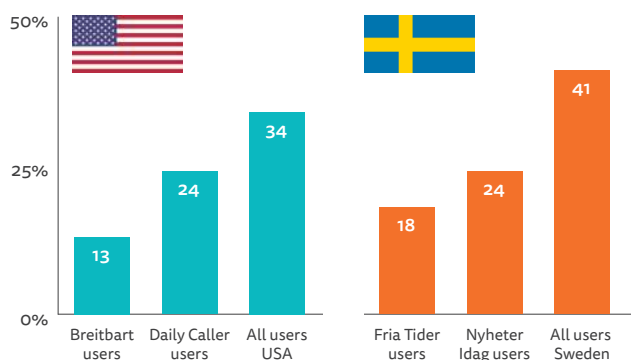
"Conservative news is real news as opposed to totalitarian socialist propaganda from elite media sources."
 (M, 64, Breitbart user, US)

"I generally agree with the views of these sites, and they don't report 'fake news' like CNN and the other Lame Stream Media!"
 (M, 71, Breitbart user, US)

In other countries too, the rejection of mainstream, 'biased', 'political correct' media was a core reason for using these websites:

"Mainstream media is biased, always covers the news to show the Tories in a good light, you have to look further if you want the truth."
 (F, 48, Another Angry Voice user, UK)

PROPORTION OF USERS OF SELECTED ALTERNATIVE OR PARTISAN BRANDS THAT TRUST MOST NEWS MOST OF THE TIME – US AND SWEDEN



"I like to read articles which don't appear in the mass media for reasons of political correctness."
 (M, 47, Politically Incorrect news user, Germany)

In Germany and Austria in particular, a key motivation expressed was about finding alternative and different perspectives on the subject of immigration. Here traditional media, and in particular Public Service Broadcasters (PSBs), are seen by some as deliberately concealing the truth:

"I believe that the public service broadcasters such as ARD and ZDF are controlled by the state. That's why I also inform myself on websites that offer free and uncensored news."
 (M, 67, Politically Incorrect (PI-News), and Junge Freiheit user, Germany)

Q5c_2018_2. Which, if any, of the following have you used to access news in the last week.
Q6_2016_1. Please indicate your level of agreement with the following statement. I think you can trust most news most of the time. Base: All those that used Breitbart/Daily Caller in the US and Fria Tider/Nyheter Idag in Sweden: US = 171/133, Sweden 212/198.

“Because it is interesting and because as opposed to the ORF, it provides uncensored news.”

(M, 61, Unzensuriert user, Austria)

“The Junge Freiheit often reports about things that interest me: when dole sanctions are tightened, when things are concealed in the media, or simply when information are tried to be kept away from us. It is not my first point of contact but when it comes to social injustices etc., it is my reference.”

(F, 35, Junge Freiheit user, Germany)

In Spain the character of these sites is distinctly different. The weakness of mainstream media has led to a range of alternative political websites and blogs that do not always fit a left/right agenda. Partisanship could be related to the territorial integrity of Spain (Catalan independence) or more closely related with a particular political party. But the motivation for using these sites is similar, to gain perspectives that are not represented by the mainstream media.

“To get news from a Catalan point of view because I don’t trust news from Spain.”

(F, 34, Directe.Cat user, Spain)

“To have another perspective of the news and current affairs. Each organisation according to its ideology tells the stories a certain way.”

(M, 40, OK Diario and Libertad Digital user, Spain)

Many respondents expressed the view in open-ended comments that alternative sites provide accurate reporting and valuable perspectives and that it is mainstream media that are biased. However, amongst others, there is a recognition that the coverage they consume is politically partisan, indeed this is part of the attraction:

“[they are] honest about the bias they have.”

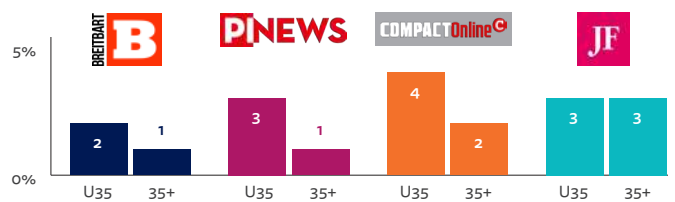
(M, 31, Another Angry Voice and Evolve Politics user, UK)

USE OF ALTERNATIVE WEBSITES AND AGE/GENDER

Looking at the demographic profile of different sites in the US, we see that they are used by both young and old, though Breitbart in the US is more popular among those over 35 (8% reach vs 3% reach among those below 35). It is also predominantly used by men (68% of its audience).

In the UK, there are no significant differences in terms of age in the use of the right-wing Breitbart or the left-wing Canary, which are used only by a small fraction of the UK population. But in Germany, we see a different demographic profile. When looking at whether people use at least one of a number of right-wing websites, (Breitbart, Politically Incorrect (PI-News), Compact Online, Junge Freiheit), we find that they are more popular among those under 35, while they are predominantly used by men (60% of those who use at least one of these websites). We also do not find any clear association with income. These websites in Germany are similarly popular among individuals in low, medium, and high-income households.

PROPORTION THAT USED SELECTED ALTERNATIVE OR PARTISAN BRANDS IN THE LAST WEEK BY AGE – GERMANY



Q5c_2018_2. Which, if any, of the following have you used to access news in the last week. Base: Under 35/35+ and over: Germany = 510/1528.

Overall, we find that the users of alternative or partisan websites in a number of countries show a more diverse profile than expected, although they tend to be predominately male. Most users of these sites have low trust in the news and in mainstream media outlets in particular, which they think fail to tell the truth on issues like Europe and immigration. Some sites have close links to politicians and political parties, others are run by individuals with strong beliefs. But with significant and surprising usage in some countries, these sites reflect and to some extent inflame populist and anti-establishment narratives that are sweeping much of Europe.

This chapter was compiled with the help of research and insight from Grzegorz Piechota, Reuters Institute (Poland), Kristoffer Holt, Linnæus University, Kalmar (Sweden), Samuel Negredo Bruna, University of Navarra, (Spain), Sergio Sparviero and Josef Trappel, Salzburg University (Austria), Sascha Hölig, Hans-Bredow-Institut für Medienforschung (Germany).

2.5 Donations and Crowdfunding: an Emerging Opportunity?

Nic Newman

Research Associate, Reuters Institute
for the Study of Journalism

While some countries see significant progress in persuading consumers to pay for digital subscriptions, this is proving more challenging for less wealthy countries, for poorer groups, and for particular types of content that are democratically important or less commercially valued.

In these cases, donations could be one way of maintaining existing legacy news organisations and funding new enterprises. News organisations like the *Guardian* are building their future business on the back of donation-based membership, while our country pages are full of examples of new crowdfunded start-ups. In this chapter we look at the extent and limits of this approach across countries and explore the reasons why more people are donating to news, with a focus on the US, Spain,⁴⁰ and the UK.

Overall we find that the percentage of people donating to news organisations is small, just 1% in the UK rising to 3% in the US. But the scale of the opportunity looks to be much greater, with on average, a quarter of our sample (22%) saying they might be prepared to donate to a news organisation in the future if they felt it could not cover their costs in other ways.

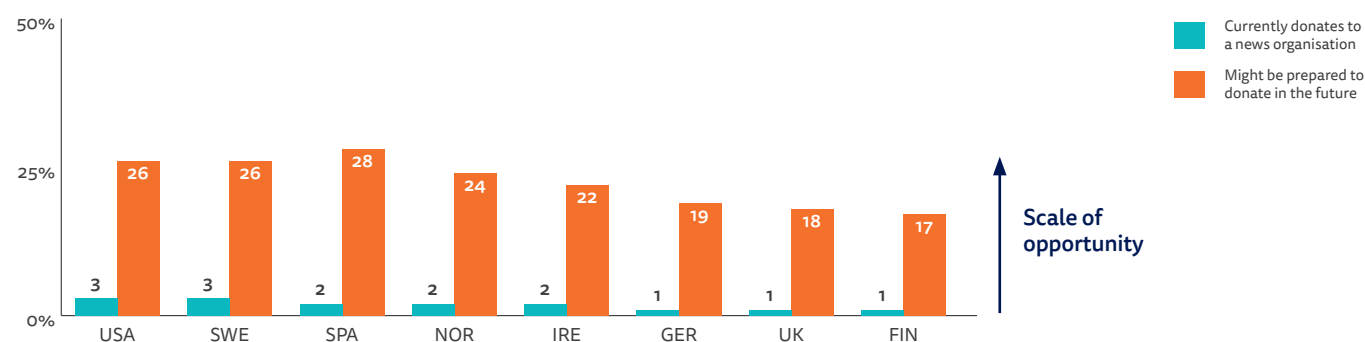
WHO DONATES TO NEWS ORGANISATIONS?

Donations tend to come from the younger half of the population. This millennial group is more confident about paying for online services in general and gives more regularly to online charities.⁴¹ As our own research into paying for news showed last year, many younger people are reluctant to sign up for just one subscription for fear of missing out on being able to pick and choose sources. Any message that suggests contributions might keep journalism open is likely to work well with this group.

GUARDIAN MESSAGING THAT APPEARS ON MOST NEWS STORIES

Unlike many news organisations, we haven't put up a paywall - we want to keep our journalism as open as we can. The Guardian's independent, investigative journalism takes a lot of time, money and hard work to produce. But the revenue we get from advertising is falling, so we increasingly need our readers to fund us. If everyone who reads our reporting, who likes it, helps fund it, our future would be much more secure. **Support the Guardian from as little as £1.**

PROPORTION THAT MADE A DONATION TO A NEWS ORGANISATION IN THE LAST YEAR/WOULD CONSIDER DONATING IN THE FUTURE - SELECTED MARKETS

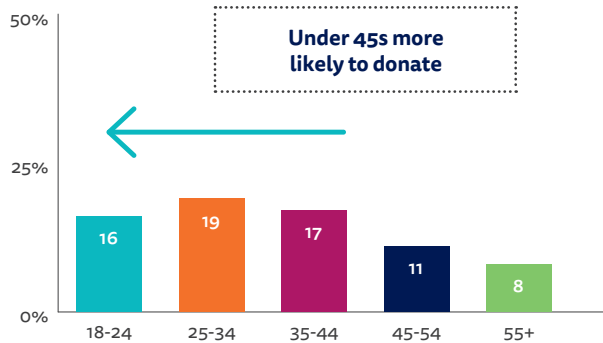


Q7ai. You said you have accessed paid for ONLINE news content in the last year. Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? **Q7c_DONATE_2.** Please indicate your level of agreement with the following statement. I would consider making a donation to a news outlet I like if they were unable to cover their costs in other ways. Base: Total sample in each market.

⁴⁰ For information about donations in Spain we are grateful to Samuel Negredo Bruna and the team at the University of Navarra.

⁴¹ <https://www.thebalance.com/how-millennials-have-changed-charitable-giving-2501900>

PROPORTION OF PEOPLE WHO PAID FOR ONLINE NEWS VIA DONATION BY AGE – ALL MARKETS



Q7a.i. You said you have accessed paid for ONLINE news content in the last year. Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? Base: 18-24/25-34/35-44/45-54/55+ who paid for online news in the last year: All markets = 1197/2280/2060/1578/2962.

Many donations are also politically driven, with the vast majority coming from the centre or the left. In part this is a reflection of historical ideological battles, when many left-wing newspapers were funded by co-operatives or unions as a counter to a capitalist-funded press. But in countries like the United States the media are again increasingly seen as part of a political struggle – between supporters and opponents of Donald Trump. In this context, our open-ended survey responses suggest that donation is often seen as a political act:

“I donate in support of the First Amendment, which I feel is under attack by this administration.”

(M, 34, US)

“I want to make sure those news outlets stay open.”

(F, 64, US)

But donations are not exclusively the preserve of the left, with partisan conservative sites increasingly appealing to their supporter base to donate – especially as many advertisers are now boycotting these sites.

TRADITION OF PHILANTHROPY IN THE UNITED STATES

A wide variety of publications ask for donations in the United States. NPR has been running funding drives for decades and the bulk of its revenue comes this way (for radio and now its popular website). The same is true for local NPR and PBS affiliates. Some thriving local news providers, such as the non-profit *Texas Tribune* and *Mississippi Today* also ask for reader contributions, stressing in their messaging the benefits of a fact-based approach. Launched in 2009, the *Tribune* generates \$6.5 million in annual revenue, with a staff of nearly 60 people.



This messaging is designed to strike a chord with those who are worried about ‘fake news’, partisan news, and poor journalism.

“I now realise that good journalism requires money. If I keep relying only on free news stories, the quality of journalism I get will be dumbed down and made much worse.”

(M, 52, US)

For others, the rise of subscription has raised concerns about a two-tier system, where high-quality news is reserved for those who can afford it. This is why some organisations prefer to keep access free but ask for voluntary contributions. The majority of the *Guardian’s* one-off donations come from the United States.⁴²

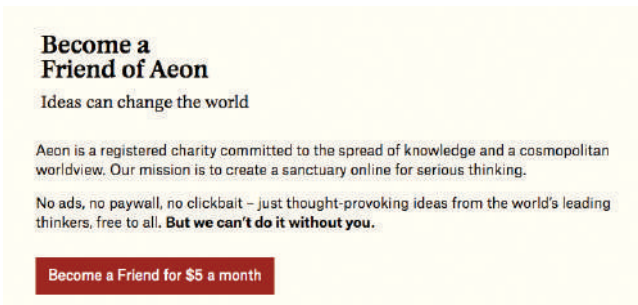
“I paid for The Guardian because I read its work and it doesn’t have a paywall. I didn’t pay as much as I would for a typical year’s subscription, though, because I don’t read it very often.”

(F, 60, US)

In this respect the donation model may be a good fit for the *Guardian* outside the UK, as they are unlikely to be first choice for an expensive subscription but provide a strong value-based proposition for those with a liberal outlook. For similar reasons, there is also a wide range of small blogs and writers that are starting to use donations as a model.

“I feel that independent journalists bring truth to what is going on in the world. Aeon Magazine, Medium, Elephant Journal, Carolyn Baker – these are examples of who I pay to support.”

(F, 60, US)



Respondents in our survey repeatedly talked about wishing to support independent writers, even if they don’t use them every day. Regular donations or one-off tips for well-researched articles are one way of showing appreciation.

⁴² <https://www.theguardian.com/gnm-press-office/2018/jan/26/guardian-us-reaches-milestone-with-over-300000-paying-supporters-in-america>

DONATIONS AND CROWDFUNDING IN SPAIN

Independent media in Spain have been experimenting with a range of donation models for years. This has been important in a country with little tradition of print subscription and where journalism is threatened by declining revenues and a perceived lack of independence.

“It is the only way to maintain free media that is independent of political power.”

(M, 45, Spain)

As far back as October 2015, El Español raised €3.6m (£2.6m; \$4m) through equity crowdfunding. At launch it had 5,624 small shareholders and around 10,000 subscribers. But now its strategy has switched to ongoing donation models, something it has in common with many other digital-native news organisations.

These usually take the form of voluntary subscriptions or memberships, pioneered by Vilaweb in Catalonia and successfully adopted by Eldiario.es, which had more than 30,000 members in April 2018.⁴³ Users donate money on a regular basis and obtain extra benefits in return such as an ad-free website or participating in meetings. The annual membership fee is €60 though you can choose to donate more.

The key messages are about defending journalism and improving society – ideas that strike a chord with many of our respondents.

“Paying a subscription or giving a donation is, for my part, a way to maintain a service to the community.”

(M, 70, Spain)



REASONS FOR DONATIONS – UNITED KINGDOM

In the UK, news has traditionally been supplied by a strong and vibrant commercial newspaper sector, commercial TV, and the publicly funded BBC. Donation is a relatively new concept. Just 1% of our sample gives to a news organisation and from comments it is clear that most are donating to the *Guardian*. This is not

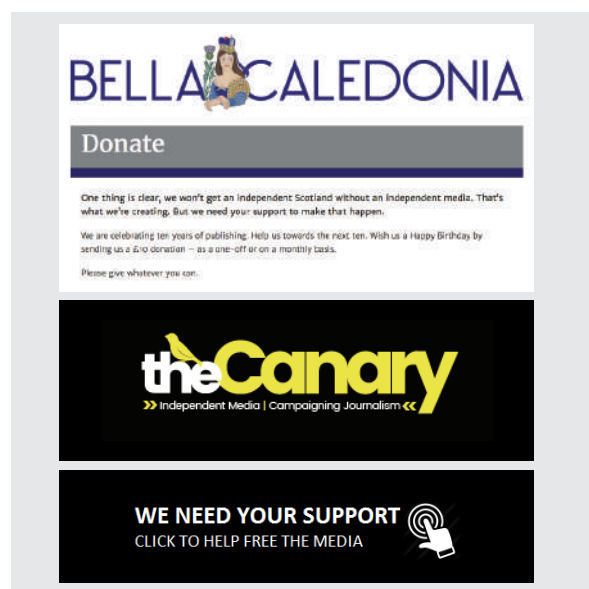
surprising given that very few others are asking for donations. A key motivation is a desire to preserve one of the few mainstream news organisations with a distinctly liberal agenda.

“It is important that the Guardian continues to be available to counter nearly all the other newspapers which are right-wing.”

(F, 63, UK)

For others, donation is more about guilt. Respondents say they used to pay for the printed paper but now access it free on the internet so they feel they should contribute.

A few other small UK publications that now ask for donations were also mentioned by respondents. These include bloggers and political sites like pro-independence Scottish site Bella Caledonia and Scot goes Pop. The Canary is a left-wing partisan site that relies on monthly contributions from around 1,500 supporters.



Across all countries we find that donations are increasingly asked for, and increasingly given. Part of the motivation is to support fact-based journalism in an era of ‘fake news’ and support a greater variety of independent voices. But many of our respondents also talked about giving money because they wanted to identify with a cause, or set of values. This matters because it deepens the relationship between some audience members and some journalists at the same time as potentially increasing the supply of more partisan journalism.

Perhaps the most significant finding is that younger groups are most likely to give money for news. Donations may help bridge the gap between paying nothing and an expensive subscription, but they also work better for a generation that likes to access multiple sources on multiple devices. For both these reasons we can expect pay-as-you-go models like donations and crowdfunding to be an increasingly important part of the picture.

⁴³ <https://l.eldiario.es/30000-socios>

2.6 The Rise of Messaging Apps for News

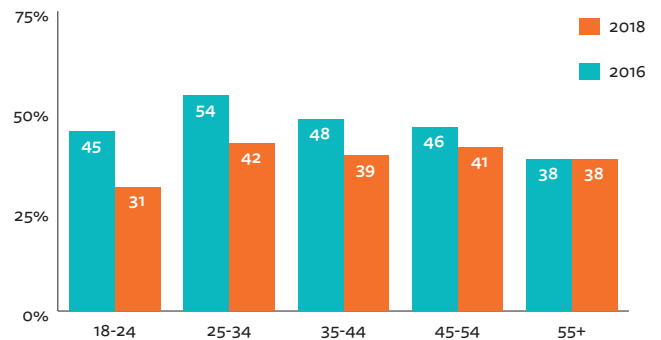
Antonis Kalogeropoulos
 Research Fellow, Reuters Institute
 for the Study of Journalism

In this chapter, we explore the rise of the use of messaging apps for news and how this is related to decline in Facebook use for news. As seen in the Executive Summary of this report, the use of Facebook for news has been falling since 2016 in many countries, especially in some that have been affected by public debate over misinformation. At the same time, more people have been using messaging apps such as WhatsApp for any purpose (44%), while average usage for news has more than doubled to 16% in four years.

In terms of definition, it can be hard to separate social networks from messaging applications, though we have attempted to do so on the basis of whether they are principally used for messaging or not. Twitter and Instagram, of course, have messaging built into their service but it is not their primary purpose. Snapchat started as an app for ephemeral messaging but has now developed a richer feature set.

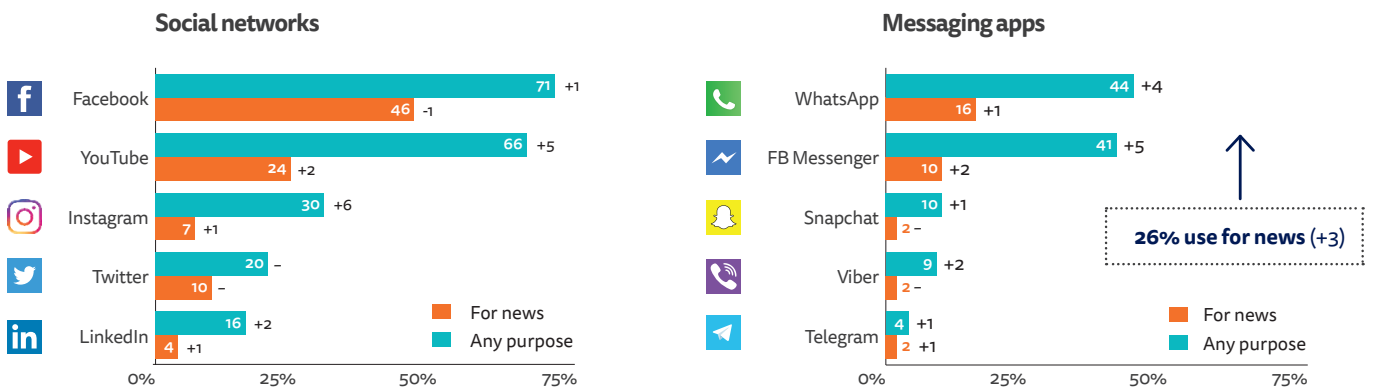
In the US, which is one of the countries with the steepest decrease in Facebook use for news, we can see that this is much greater among young users (14 percentage points difference between 2016 and 2018) whereas among the oldest age group there are no differences reported. At the same time, use of messenger apps for news (WhatsApp, Facebook Messenger, Viber, Telegram, etc.) has grown with all groups but under 35s are the heaviest users.

PROPORTION THAT USED FACEBOOK FOR NEWS IN THE LAST WEEK BY AGE (2016-18) - US



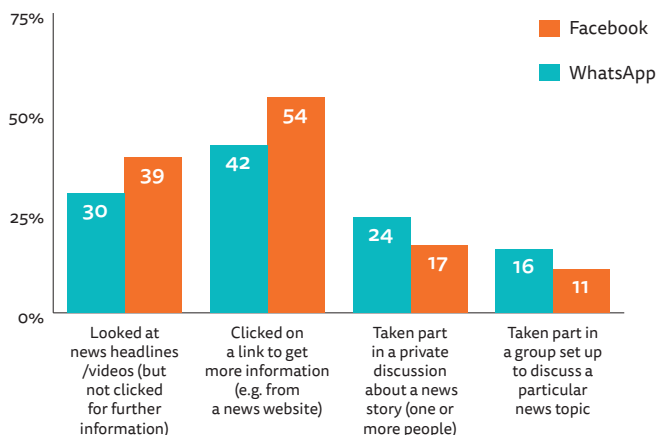
Q12B. Which, if any, of the following have you used in the last week for news? Base: 18-24/25-34/35-44/45-54/55+; 2016 = 175/329/377/300/1016, 2018 = 232/386/441/355/987.

PROPORTION THAT USED SELECTED SOCIAL NETWORKS AND MESSAGING APPS IN THE LAST WEEK - ALL MARKETS



Q12A/B. Which, if any, of the following have you used for any purpose/news in the last week? Base: Total sample in all markets. Note: Also showing change from 2017.

PROPORTION THAT USE WHATSAPP AND FACEBOOK FOR EACH – ALL MARKETS



Q12_2018_FB/WA. Thinking about the news you get via Facebook/WhatsApp, which of the following have you done in the last week? Base: All that used Facebook/WhatsApp for news in the last week. All markets = 34014/11660.

When looking at different news-related activities on Facebook and WhatsApp, we find that Facebook is most likely to be used for reading or discovering news, either by glancing at headlines or clicking to read a full story. On WhatsApp, users are more likely to take part in a private discussion about news (24%) or to take part in a group set up specifically to discuss a news topic (16%).

Focus groups, held in the US, UK, Brazil and Germany, give us more insight this year about why messaging apps might be better at facilitating interaction and discussion. Users said that they have groups set up for friends, family or work and that they can chat and post articles about all sorts of topics including news more freely:

“The whole thing about social media is like wearing a mask. So when I am in my messaging groups with my friends the mask comes off and I feel like I can truly be myself”

(F, 30-45, UK)

But the use of social networks and messaging apps for news is not mutually exclusive. Respondents often talked about coming across news via Facebook or Twitter, but then posting it on WhatsApp when they wanted a discussion or debate:

“Somehow WhatsApp seems a lot more private. Like it’s kind of a hybrid between texting and social media. Whereas in Facebook, for some reason it just feels like it’s public. Even if you’re in Messenger.”

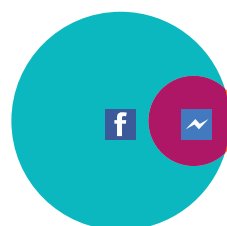
(F, 20-29, US)

“The source is still Facebook because when we’re going to share something on WhatsApp, usually the article we’ve found is on Facebook. So Facebook is still king in that sense.”

(M, 20-29, US)

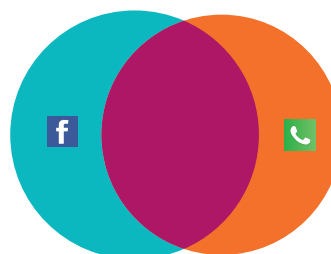
The majority of those who use messaging apps for news also use Facebook for news. This is particularly the case in the United States where Facebook Messenger dominates and WhatsApp is rarely used. But in Brazil and Germany, where WhatsApp is widespread, there is slightly less overlap with Facebook. In these markets more reading and sharing seems to have moved to WhatsApp as well as discussion – at least for some people.

OVERLAP IN USE OF FACEBOOK AND WHATSAPP FOR NEWS – SELECTED MARKETS



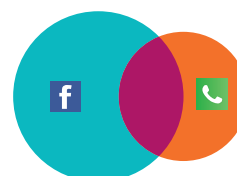
US

Use Facebook for news: 39%.
Use Messenger for news: 7%.
Use Facebook and Messenger for news: 6%



Brazil

Use Facebook for news: 52%.
Use WhatsApp for news: 48%.
Use Facebook and WhatsApp for news: 28%.

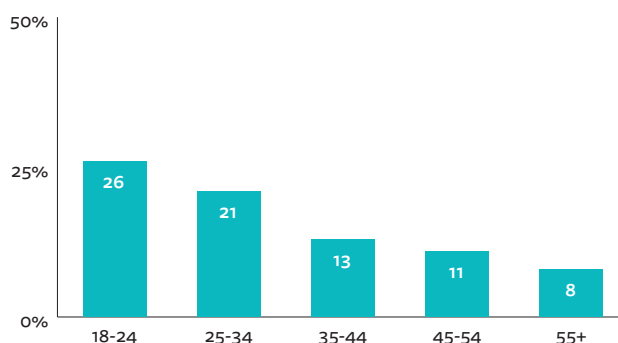


Germany

Use Facebook for news: 24%.
Use WhatsApp for news: 14%.
Use Facebook and WhatsApp for news: 6%.



Q12B. Which, if any, of the following have you used in the last week for news? Base: Total sample in each market.

PROPORTION THAT USED MESSAGING APPS FOR NEWS IN THE LAST WEEK BY AGE – US



Q12B. Which, if any, of the following have you used in the last week for news? Base: 18-24/25-34/35-44/45-54/55+. 232/386/441/355/987. Note: Showing net usage for WhatsApp, Line, Viber, Snapchat, WeChat, Kik, Slack, and Facebook Messenger.

PROPORTION THAT USE FACEBOOK MESSENGER AND WHATSAPP FOR NEWS – SELECTED MARKETS

Messaging Apps	Greece	Norway	US	Australia	Finland	Argentina	Hong Kong	Malaysia
FB Messenger for news	22%	11%	7%	11%	5%	9%	8%	12%
WhatsApp for news	4%	2%	4%	10%	10%	37%	38%	54%

Q12B. Which, if any, of the following have you used in the last week for news? Base: Total sample in each market.

Across a wider set of countries, we find that the use of Facebook Messenger for news is high in a few countries like Greece or Norway where it is the dominant messaging app for news or for all purposes. However, in most countries, WhatsApp is the dominant messaging app, particularly in Latin American, Southeast Asian, and Southern European countries.

Elsewhere we see a range of other messaging apps that are not owned or operated by Facebook. Viber is the most popular messaging app in a number of Balkan countries where it is used for news by 14% in Bulgaria and Greece and 12% in Croatia. Line is widely used in Taiwan (73% for any purpose, 53% for news), while it is also the most popular messaging application in Japan (27% for any purpose, 9% for news).

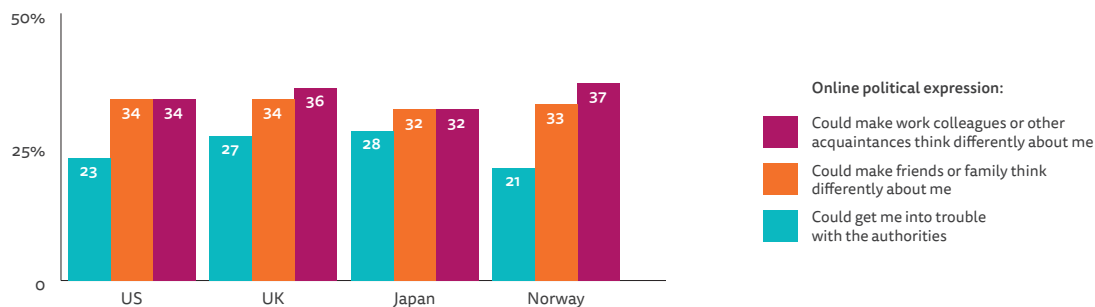
WeChat is widely used in Hong Kong (52% for all purposes and 15% for news) and Malaysia (28% for all purposes and 10% for news). Kakao Talk is the dominant messaging app in South Korea used by the large majority of online news users (39% also use it for news). Telegram use is increasing but still at low levels. It has doubled since 2016 in the 26 countries of the 2016 sample, reaching 3% in 2018. However Telegram, whose main feature is strong encryption, is particularly popular in more authoritarian countries such as Malaysia (21% use it for all purposes and 9% for news) and Singapore (19% for all purposes and 6% use it for news).

Privacy is an important issue for users, and this partly explains the growth in use of messaging apps, as opposed to more open social networks. As noted in the Executive Summary, users in some ‘less free’ countries are more likely to think carefully before expressing their political views online. However, we can see that people also turn to messaging apps in non-authoritarian countries.

One reason is that they do not always feel comfortable in expressing their political views in front of friends, family, and acquaintances. In countries like Japan, Norway, the US, or the UK (see chart below), more people are concerned that their immediate or outer social circle will think differently about them⁴⁴, and that can be a reason why more people are using messaging apps for news.

Overall, these findings highlight the move of audiences, particularly younger groups, to more private apps for reading and particularly discussing news. However, as the findings suggest, large and less private social networks (mainly Facebook) are still largely used for finding and reading news stories. If these trends towards messaging apps are strengthened, it could create new dilemmas for publishers around being able to engage with ordinary citizens. The shift to messaging apps is partly driven by a desire for greater privacy, so pushing news into these spaces needs to be more organic and more conversational if it is to be accepted. In any case, setting up broadcast lists in WhatsApp is a complex and labour-intensive process (publishers have to provide a phone number⁴⁵ which users then subscribe to). However, journalists have effectively used WhatsApp groups to distribute news when covering political development in places with censorship.⁴⁶ Facebook Messenger makes it easier for publishers to create branded spaces and conversational interfaces but users have so far proved reluctant to sign up. Finally, if more immediate and intelligent discussion moves to messaging apps, this could make Facebook and Twitter comments even less representative of general users than they already are.

PROPORTION CONCERNED ABOUT DIFFERENT CONSEQUENCES OF OPENLY EXPRESSING THEIR POLITICAL VIEWS ONLINE – SELECTED MARKETS



Q13a_2018_1-3. Please indicate your level of agreement with the following statements. I tend to think carefully about expressing my political views openly on the internet because this could get me into trouble with the authorities/because this could make friends or family think differently about me/because this could make work colleagues or other acquaintances think differently about me. Base: Total sample in each country.

⁴⁴ A phenomenon called ‘context collapse’ by danah boyd, ‘Faceted Id/entity: Managing Representation in a Digital World’, MA thesis, Massachusetts Institute of Technology, Cambridge, MA, 2002.
⁴⁵ E.g. <http://www.bbc.co.uk/news/world-30821245>
⁴⁶ https://www.cjr.org/tow_center_reports/foreign_correspondents_chat_apps_unrest.php

2.7 Podcasts and New Audio Strategies

Nic Newman

Research Associate, Reuters Institute
for the Study of Journalism

Audio is attracting new renewed interest from publishers as mobile listening grows and on-demand technology in the car disrupts linear radio listening. At home, voice-activated speakers like the Amazon Echo and Google Home are creating new opportunities to distribute linear podcasts as well as create new audio products.

In this chapter we explore the popularity of news-related podcasts in 22 countries⁴⁷ and also look at which demographics are most likely to access these episodic digital audio files, which can be downloaded, subscribed to, or listened to. For the first time this year, we have also asked about the type of podcasts accessed, and in a number of countries open-ended responses give us more detail about the most popular programming.

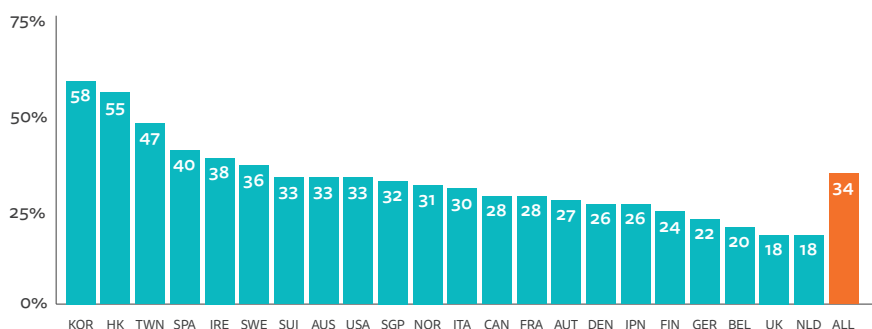
Overall, a third of our sample (34%) listens to a news-related podcast at least monthly but there are significant country differences. In Asian countries like South Korea (58%) and Taiwan (55%), strong smartphone penetration together with high levels of social sharing have helped podcasts grow rapidly. In the United States, which has produced much of the innovation in terms of formats (Serial, S-Town) and business models (sponsorship and targeted advertising), a third (33%) say they have accessed a news podcast in the last month.

Surprisingly, podcasts seem to be least accessed in North European countries with a strong audio tradition such as Finland (24%), Germany (22%), the UK (18%), and the Netherlands (18%). This may be because popular public broadcasters have little incentive to undermine their linear radio listening by producing or promoting podcasts. On the other hand, there may also be problems of definition with the term podcast not equally understood across countries. In the UK, for example, much listening comes via the popular BBC iPlayer radio app but on-demand streams and downloads accessed this way are not labelled specifically as podcasts and may not be understood as such in surveys such as ours.

PODCASTS ARE A SIGNIFICANT OPPORTUNITY TO REACH YOUNGER AUDIENCES

The most striking demographic trend is the extent to which young people have embraced podcasts. The chart overleaf compares the proportion of each age group that uses podcasts at least monthly with those that listen to radio news at least weekly. This is a slightly unfair comparison given that monthly radio listening will be somewhat higher than the chart suggests. Even so, just under half of under 35s are using news-related podcasts, which is almost certainly far more of this group than listen to traditional radio news.

PROPORTION WHO ACCESSED A PODCAST IN THE LAST MONTH – SELECTED MARKETS

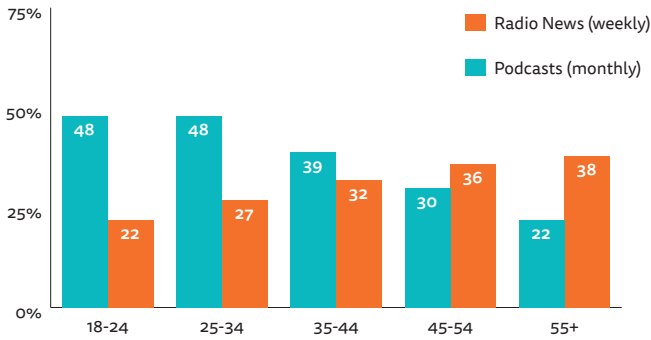


Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Base: Total sample in each market.

⁴⁷ US, UK, Germany, France, Italy, Spain, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Japan, South Korea, Taiwan, Hong Kong, Singapore, Australia, Canada.

Following the release of iTunes analytics in December 2017, early data suggest that most podcasts are listened to for at least 90% of their duration, giving the lie to the view that young people have minimal attention spans. With advertising spend on podcasts in the United States rising to \$220m they could offer a significant commercial opportunity for publishers as well as a route to attracting hard-to-reach millennials.⁴⁸

PROPORTION THAT LISTEN TO PODCASTS AND RADIO NEWS BY AGE – SELECTED MARKETS

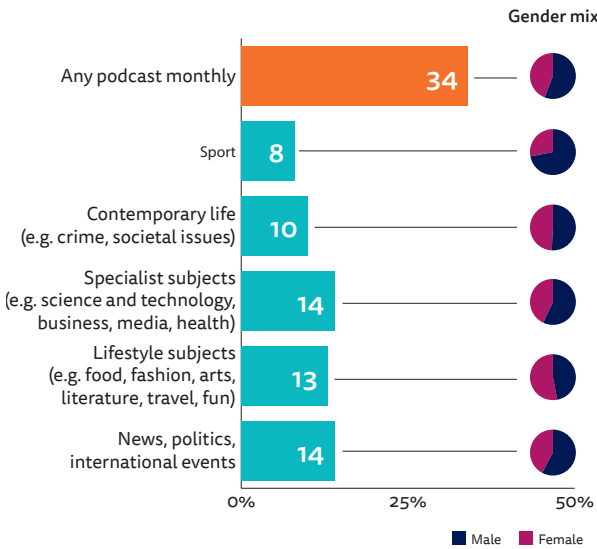


Q3. Which, if any, of the following have you used in the last week as a source of news? Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Base: 18-24/25-34/35-44/45-54/55+. Selected markets = 4787/7575/8084/8566/16998.

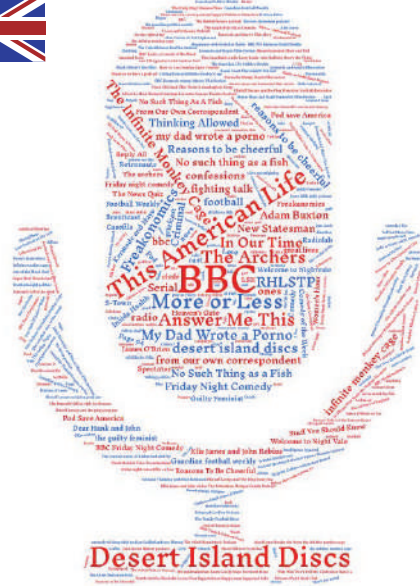
TYPES OF PODCASTS CONSUMED

When looking at the types of popular podcasts accessed, we find that news and politics is only one part of the mix. Podcast genres seem to follow a similar mix to a speech radio schedule with lifestyle, food, health, technology, business, and sport playing a significant part. In our open-end responses, comedy programmes were also mentioned but were not captured in our survey question. Podcast listening tends to skew male along with wider news use, with only lifestyle subjects attracting more women.

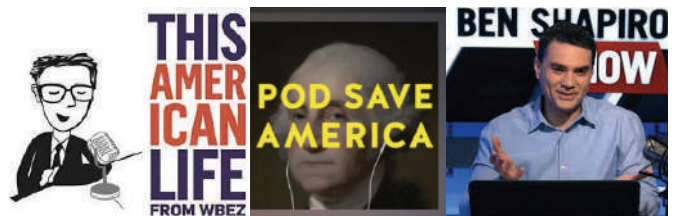
PROPORTION THAT LISTEN TO EACH TYPE OF PODCAST – SELECTED MARKETS



Q11F_2018. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Base: Total sample in selected markets.



The US podcast scene is vibrant and varied. Over 500 different podcasts were mentioned, ranging from political talk shows like Ben Shapiro and Rush Limbaugh, adapted public radio shows like *This American Life* and *Freakonomics*, and digital-born shows like *Pod Save America*, a progressive podcast run by four former aides to Barack Obama, *Every Little Thing* from Gimlet media, and *Guys We F**ked*, a podcast about sex from comics Krystyna Hutchinson and Corinne Fisher.




⁴⁸ <https://www.wired.com/story/apple-podcast-analytics-first-month>

In the UK, respondents referenced almost 100 different BBC programmes. Successful US podcasts were also widely consumed while UK newspaper publishers like the *Guardian*, *The Times* and the *Telegraph* feature in the list, with podcasts ranging from politics to sport, and health. New political podcasts consumed include one from Brexiteer and Conservative MP Jacob Rees-Mogg – known as the Moggcast.



In addition to the 22 countries shown above, we also asked about podcasts in Turkey, where we poll using an urban sample. Here we find more than two-thirds of this group using podcasts monthly, partly as a result of improving connectivity and ubiquitous smartphone use amongst the urban population. A number of the most popular podcasts are in English with the BBC's Global News topping the iTunes chart.

Improving English-language fluency is a key motivation for using podcasts in Turkey, but the platform also provides an alternative platform for free journalism. Many of the top Turkish-language podcasts are critical of the government, with three outlets in particular, Acik Radyo, Ünsal Ünlü, and Medyascope, providing news and debate in this context. One of them is a radio channel, and other two broadcast through Twitter's Periscope platform. The output is also then reversioned for podcast. Ünsal Ünlü runs one of the most popular podcasts in Turkey, regularly reaching around 45,000 people with broadcasts across all digital platforms. His podcast subscribers alone have more than doubled in the last year.⁴⁹



Ünsal Ünlü

Broadcasts:
5 times a week at regular time

Channels:
YouTube, Twitter, Scope (Periscope), Soundcloud and iTunes (Podcast)

CONCLUSION

Podcasts are both a threat and an opportunity for existing broadcasters. They enable new audiences to be reached beyond national boundaries – and on new devices – but the low barriers to entry have also opened up competition to a vast array of new entrants, including both newspapers and digital-born brands. In many (European) countries they are also challenging the relatively neutral tone of radio broadcasting by injecting both stronger opinions and a greater variety of views. In less free societies they are offering a relatively open platform for democratic debate that is, in theory at least, a bit harder to shut down. Critically, the demographics of podcasting are explosive. The younger generation is embracing content at a time and in a format that works for them – a trend that looks unlikely to be reversed any time soon.

⁴⁹ Personal conversation with Ünsal Ünlü by Servet Yanatma, Visiting Research Fellow Reuters Institute, Mar. 2018, who also contributed to this section on Turkey.



Section 3

Analysis by Country

In this section we publish a *country-based* view of the findings, which includes an overview of media characteristics and the most important data points in terms of digital news.

These include headline figures on 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. Information is drawn from the 2018 *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* (2017). Where appropriate, our country-based authors have also referenced industry-based statistics that supplement our survey-based approach.

Whilst most of our countries see internet penetration of 80% or more, Brazil, Mexico, and Turkey 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 and Turkish samples are urban-based samples (and skew 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.

In 14 countries the figures on device usage may have been affected by an issue that meant the survey could only be taken on desktop devices (see Methodology for further information about which countries were involved).

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

We have ordered the countries by geography (Europe, Americas, and Asia-Pacific) and within each region countries are then ordered alphabetically – with the exception of UK at the start of the Europe section and the United States at the start of the Americas.

Europe		
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3.15	Netherlands	90
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Section 3

Analysis by Country

Europe

Europe		
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3.23	Switzerland	106
3.24	Turkey	108

UNITED KINGDOM

STATISTICS

Population	66m
Internet penetration	95%

The UK media have played a leading part in exposing the shortcomings of tech companies over internet safety, privacy, and 'fake news'. Meanwhile, politicians are looking into misinformation and the role of platforms in undermining journalism.

The *Observer*/*Guardian* and Channel 4 News revealed that Cambridge Analytica used information from more than 50 million Facebook profiles to build a system that could target US voters. Earlier, investigations by *The Times* embarrassed Google, showing that ads for reputable brands had appeared alongside YouTube videos advocating extremism, as well as those featuring children and sexualised content.

Meanwhile a committee of British MPs has been investigating 'fake news' and demanded information from Facebook and Twitter about any Russian activity during the EU referendum. Pressure for some kind of regulation is growing, even as our data show social media usage for news starting to go into reverse (-2).

The power of platforms and changing consumer habits were among the factors leading the government to set up a review into the sustainability of high-quality journalism. UK newspaper print circulations have halved since 2001, with the average revenue from digital users less than 10% of a print reader. The review is due to be published by early 2019.

But many publishers aren't waiting for government solutions. Quality newspapers are increasingly trying to charge online readers directly. The *Telegraph* has put most of its premium content behind a paywall, and is looking to increase revenue from personal finance and technology. The *Guardian* relaunched as a tabloid in January and refocused its online strategy on donations and membership. It says it has 800,000 paying supporters; reader revenue now outstrips advertising; losses



have halved in the last financial year, and it is hoping to break even by 2019. The *Financial Times* topped 900,000 subscribers in 2017, three-quarters of them digital. And *The Times* and *Sunday Times* have more than 450,000 print and digital customers, plus 2m registered users who have exchanged email addresses for a limited number of free articles. Despite these moves, our data show that fewer than one in ten (7%) pay for online news, one of the lowest figures in our report.

Mass-market and local publishers find it harder to charge for online news and are pursuing alternative strategies including cost-cutting and consolidation. In one of the most significant newspaper mergers for years, the owner of the left-leaning Mirror group bought right-wing tabloids the *Daily Express* and the *Daily Star* for £200m. The papers will maintain their editorial independence, but pooling reporters in areas like sport may save £20m each year. Local news providers like Johnston Press are looking to save money by sharing content via regional hubs. This year also sees the deployment of 150 new local democracy reporters. They will be employed by local newspapers but funded by the BBC at a cost of £8m – part of a range of initiatives in which local media gets access to BBC local video and data journalism.⁵⁰

It has been another difficult year for the BBC with its Director of News leaving to start a 'slow news' website. It was also criticised over its Brexit coverage and was at the centre of a row over equal pay.

A prominent BBC journalist resigned from her post when it emerged she was being paid considerably less than men in similar roles. Carrie Gracie accused the BBC of a 'secretive and illegal pay culture'. Coincidentally, new legislation forced all major companies to reveal gender pay gaps. Women at the Telegraph Media Group were paid 35% less on average than men.⁵¹ The BBC figure was 9.3%, against a UK average of 18%. Fixing these imbalances will be difficult when the BBC has savings targets of £80m.

Despite this, the BBC remains Europe's most successful public broadcaster with impressive weekly reach online (43%) and via TV and radio (64%). Britain's vocal and partisan national newspapers have often led the debate over Brexit, particularly in the absence of a strong government. The *Guardian's* (15%) online weekly reach overtook the *Daily Mail* (14%), while the *Sun* (7%) has been fastest-growing after abandoning its paywall.

Awareness of alternative or partisan websites such as Breitbart (19%) and the Canary (16%) is relatively high, but weekly usage is very low (just 2% for each), not least because the UK's opinion-filled newspaper websites fill the gap.

Nic Newman

Research Associate, Reuters Institute for the Study of Journalism

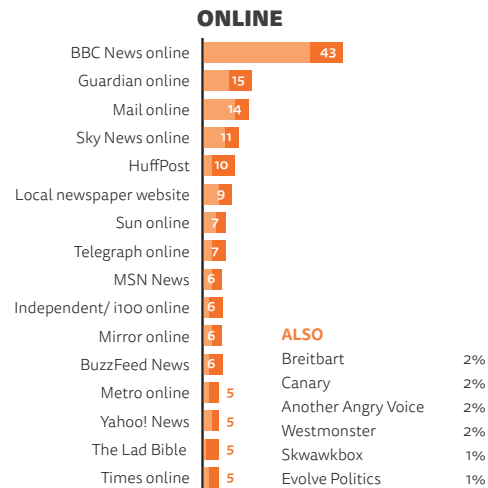
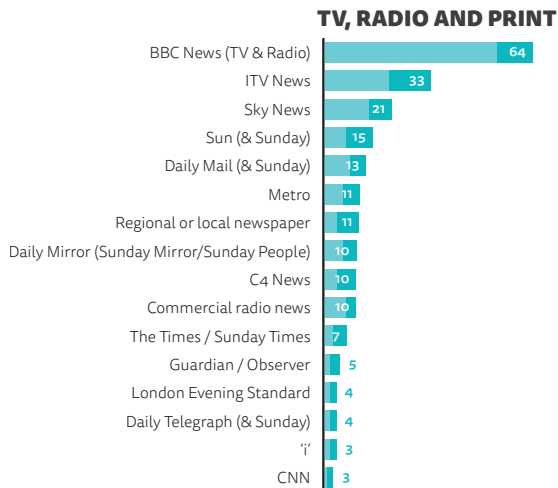
⁵⁰ <http://www.pressgazette.co.uk/most-of-150-new-bbc-funded-local-democracy-reporters-go-to-trinity-mirror-newsquest-and-johnston-press>

⁵¹ <https://www.theguardian.com/media/2018/mar/26/telegraph-media-group-gender-pay-gap>

TOP BRANDS

% Weekly usage

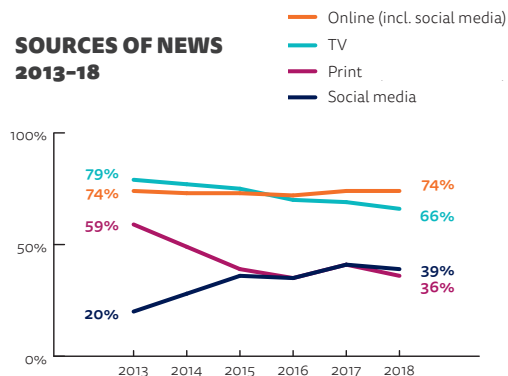
- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands



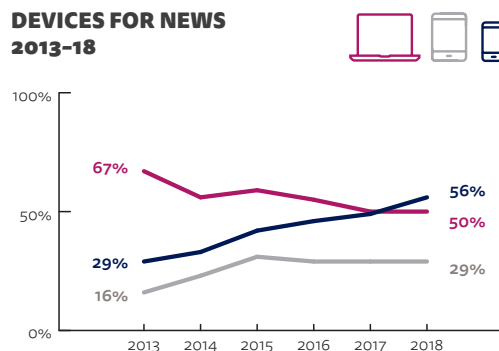
CHANGING MEDIA

The continuing decline of TV and print news has been evident for the last six years with social media growth finally levelling off. The smartphone has become the most used device for news, overtaking the computer/laptop.

SOURCES OF NEWS 2013-18



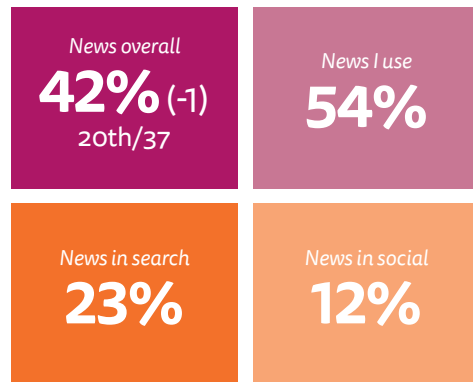
DEVICES FOR NEWS 2013-18



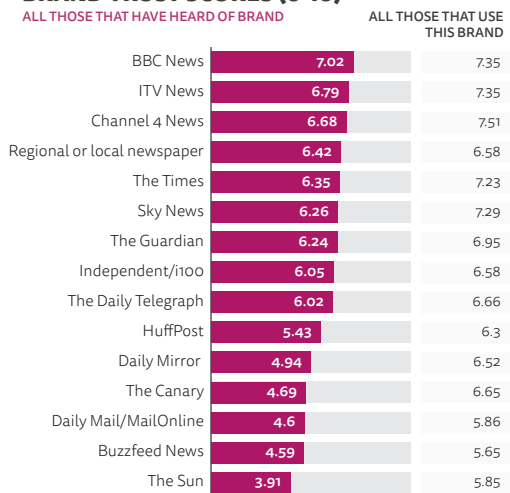
TRUST

Trust is particularly low in social media (12%), not surprising given widespread media coverage of 'fake news' and misinformation. The BBC is the most trusted news organisation in the UK with tabloid papers amongst the least trusted.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



7% (+1)
(35th/37) pay for **ONLINE NEWS**

21% (-1)
(34th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	27% (-2)	66%
2	Twitter	14% (+2)	29%
3	YouTube	8% (+1)	49%
4	WhatsApp	5% (-)	44%
5	Facebook Messenger	3% (-2)	44%
6	Snapchat	2% (+1)	12%

22%
SHARE NEWS
via social or email

14%
COMMENT ON NEWS
via social or website

AUSTRIA

STATISTICS

Population	8.6m
Internet penetration	85%

Austrian media have benefited from increased interest in news, following heated parliamentary elections, which saw the far right join a coalition government in December 2017. Meanwhile, digital and social media have contributed to an increasingly polarised climate in which overall trust in the media has suffered.



After winning a substantial victory in parliamentary elections, Sebastian Kurz, at 31 years of age, became the youngest chancellor in Austrian history by forming a coalition with the right-wing Freedom Party of Austria (FPÖ). This victory came after almost a year of government crisis and a controversial re-run of the presidential election. The agreement between Kurz's centre right Austrian People's Party (ÖVP) and the FPÖ, led by Heinz-Christian Strache, allowed the latter to gain control of key government positions, including the ministries of Defence and Interior, in exchange for a relaxation of their anti-EU positions.

But these controversial political events were only the second-most covered topic in national newspapers after stories about immigration and asylum seekers, according to the Austrian Press Agency (APA), with Donald Trump's presidency the third most followed topic. The elections also boosted television ratings, as more than 40 candidates' debates were televised, with the final one being, reportedly, the most followed ever.

The role of social media in spreading so-called 'fake news' became a central issue in the election campaign. A political consultant hired by the Social Democratic Party of Austria was alleged to be responsible for two Facebook sites that provided false information about Sebastian Kurz. The resulting outcry eventually led to the resignation of the SPÖ general secretary, who also served as campaign manager.

Before, during and after the campaign, the role of Austria's public broadcaster (ORF) and some of its journalists came under intense scrutiny from centre and right-

wing politicians. The former ÖVP leader attacked the popular news anchor Armin Wolf, following a joke on national television, which undermined his position. Another ÖVP politician accused Wolf of partisan journalism and Freedom Party leader Strache subsequently took to Facebook to accuse the ORF and Wolf of lying. Meanwhile another prominent ORF anchor-man was accused of favouring the SPÖ.

With ORF's critics now in power it could face serious consequences. Politicians have talked about reforming the ORF, including the elimination of the mandatory licence fee, its main source of funding – despite the fact that our data show ORF still as Austria's most trusted news brand (6.60), just ahead of *Die Presse* (6.59) and *Der Standard* (6.47). While the heated tones of the electoral campaign may have calmed down, the issue has not been forgotten and detailed plans are likely to emerge within the next year.

In the media business world, the Austrian private commercial TV operator ATV was sold to its main competitor, the ProSiebenSat1Puls4 group, raising plurality concerns. The Federal Competition Authority will be insisting that ATV maintains its editorial independence as the merger goes through.

2017 experienced the shutdown of NZZ.at, the first online news publication in Austria financed by digital subscriptions, and the launch of a new digital platform, Addendum, managed by a non-profit company financed by Red Bull's owner Dietrich Mateschitz.

Although Austria essentially remains a traditional news environment, printed copies of newspapers are in decline.

Compared to the previous year, *Der Standard* reduced its print circulation by 12%, *Die Presse* by 7%, and *Kurier* by 6%.⁵²

Reach for the main brands remains relatively stable with small percentage gains for all the top brands, and the percentage of people extremely or very interested in news has increased to 69% of respondents.

Trust in the news in general has fallen by 4 percentage points in the last year, while there is a 2% increase in respondents agreeing they trust the media they themselves use. This suggests an increase in polarisation as readers become more entrenched in media that reflect their views.

Indeed, Austria is home to a number of partisan websites that have gained popularity through social media. The best known of these is *Unzensuriert* (Uncensored), a site that the Austrian federal office for the protection of the constitution has described as xenophobic with anti-Semitic tendencies.⁵³ Founded by a former Freedom Party politician, almost one in five (19%) of our sample has heard of this site, with 4% having accessed it in the previous week. *Info Direct* (2%), *Alles Roger*⁵⁴ (1%), and *Contra Magazin* (1%) are three other far-right, anti-EU websites/magazines. There are a number of other small sites that represent centrist and left-wing positions.

Sergio Sparviero and Josef Trappel, with the collaboration of **Stefan Gadringer, Roland Holzinger, and Isabella Nening,** University of Salzburg

⁵² Source: <http://www.oeak.at>

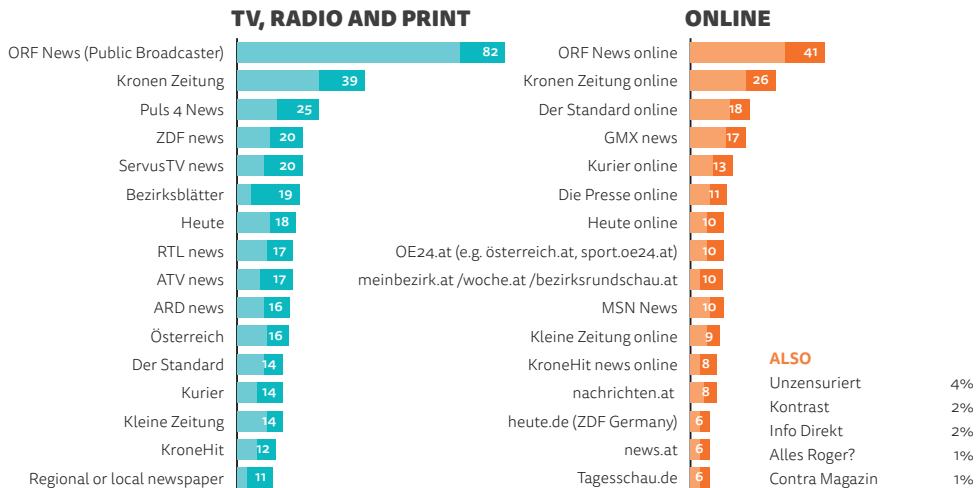
⁵³ <https://www.land-oberoesterreich.gv.at/Mediendateien/LK/beilage-kongress.pdf>

⁵⁴ <https://derstandard.at/2000044079645/Zur-Info-Das-Facebook-Universum-des-HC-Strache>

TOP BRANDS

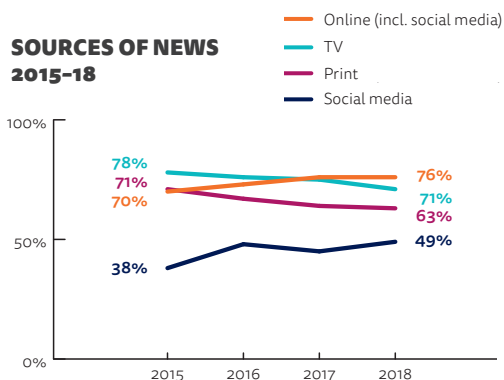
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

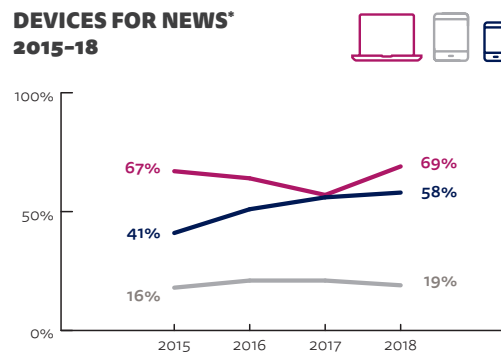


CHANGING MEDIA

Online news is now the most popular news source (76%) with our Austrian respondents while TV news continues to decline (-4). Social media use for news continues to grow (+4) amid political upheavals, which have seen the far right take posts in a coalition government.



DEVICES FOR NEWS* 2015-18

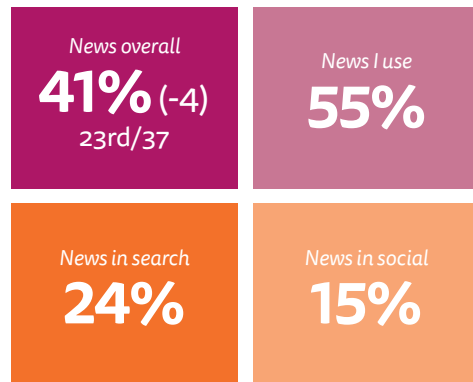


* 2018 computer data may be overstated - see methodology for more information

TRUST

Overall trust in the news is down 4 points and a closer analysis reveals that this fall comes largely from those on the left and in the centre. Trust amongst right-wingers has increased, perhaps reflecting wider satisfaction with the changing political situation.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
ORF news	6.6	6.98
Die Presse	6.59	7.37
ZDF news	6.47	7.13
Der Standard	6.47	7.3
ServusTV news	6.2	7.14
Kurier	5.95	6.75
Puls 4	5.85	6.59
Bezirksblätter	5.8	6.47
Kleine Zeitung	5.78	6.83
NEWS	5.42	6.43
RTL news	5.27	6.42
Kronen Zeitung	4.94	6.07
oe24 TV	4.87	5.68
GMX	4.74	5.59
Heute	4.36	5.29

8% (+1)
(30th/37) pay for **ONLINE NEWS**

31% (+8)
(9th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	30% (-4)	63%
2	YouTube	19% (+3)	66%
3	WhatsApp	19% (+3)	67%
4	Facebook Messenger	6% (+1)	30%
5	Twitter	4% (-)	12%
6	Instagram	4% (+1)	20%

29%

SHARE NEWS
via social or email



18%

COMMENT ON NEWS
via social or website



BELGIUM

Belgium is a small media market. It effectively has two distinct publishing sectors for the French and Flemish speaking populations, both with strong public service broadcasters that have been outstripped by commercial brands online. Recent mergers and acquisitions have raised concerns about media concentration and pluralism in the news.

In the past year, Belgium's largest publishers, De Persgroep, Mediahuis, and Roularta, continued to consolidate their market position by scaling-up their activities through mergers and acquisitions, strongly reshuffling the Belgian media landscape. This reorganisation of ownership seems to be inspired by the desire to consolidate and expand core activities rather than to branch out into new ones.

Mediahuis is exiting the audio-visual sector, selling its stake in De Vijver Media, which runs the television channels Vier, Vijf, and Zes and audio-visual production company Woestijnvis. After having acquired the Dutch publishers NRC Media in 2015 and Telegraaf Media Group in 2017, the company is clearly betting its future on news publishing. Meanwhile telecom company Telenet has bought De Vijver Media. Linear broadcasters fear that Telenet might choose to limit local content access to its premium offerings.

Earlier, De Persgroep and Roularta traded assets. De Persgroep acquired Roularta's stake in Mediaaan, the largest commercial broadcaster in Flanders. In turn, Roularta took over De Persgroep's share in Mediafin, a joint venture with Groupe Rossel, which publishes financial newspapers *De Tijd/L'Echo*.⁵⁵ Roularta now owns a profitable, digitally savvy news brand and further strengthened its magazine portfolio. De Persgroep, in turn, can now focus more prominently on monetising cross-media audiences in Flanders (and the Netherlands), owning the most popular news brands in commercial television (VTM), print and



online news (*Het Laatste Nieuws/HLN.be*), and magazines (*Dag Allemaal*).

In the French-speaking community, there was heated debate about the possible acquisition of Les Editions de L'Avenir by the Groupe Rossel. Fears of media concentration led politicians to ask the Walloon government to temporarily put Les Editions de L'Avenir in public hands. Meanwhile, Rossel and news agency Belga struck a deal which will see Belga become the sole provider of news articles for the free daily *Metro* and its website *metrotime.be*.

All this took place against the backdrop of readership levels for publishers' news brands that have remained stable over the last three years, when taking into account total print and digital readership.⁵⁶ But as our *Digital News Report* data show, print is still losing ground year after year, with television also now seeing a slight decline.

The public broadcasters VRT and RTBF remain firmly rooted in their respective regions when it comes to offline news, while still lagging behind when it comes to online news. In Flanders, the revamping of the online news offering and renaming it VRT News has not yet improved usage. The revamp coincided with the new management agreement between the VRT and the Flemish government, which confined the VRT's online remit to mainly audio-visual news in order not to disrupt the online news market. By 2021 both public broadcasters are planning to build new offices on their shared current location, embedded into a bigger media-

STATISTICS

Population	11m
Internet penetration	88%

centred urban development project called Mediapark.Brussels. The first sketches of the building show VRT's ambition to become a meeting space for citizens and media professionals.

Belgium's media market seems trapped in a paradoxical situation where Belgian companies concentrate locally to better compete globally (for advertising) with the likes of Google, Facebook, and Netflix. This has raised concerns by journalism organisations and policy-makers regarding diversity in the news. After acquiring Mediaaan, De Persgroep announced it would regroup and relocate journalists, layout, and production for all outlets in a central newsroom called News City. For newspaper *De Morgen* and magazine *Humo*, this also means working under a single editor-in-chief. While journalism organisations fear lay-offs, De Persgroep argues this will guarantee the future of its news brands.

Finally, in relation to the growing calls for holding platforms accountable, the Court of Brussels has found Facebook's use of personal tracking data to be non-compliant with Belgian privacy law. Facebook has appealed the decision.

Ike Picone

Vrije Universiteit, Brussels

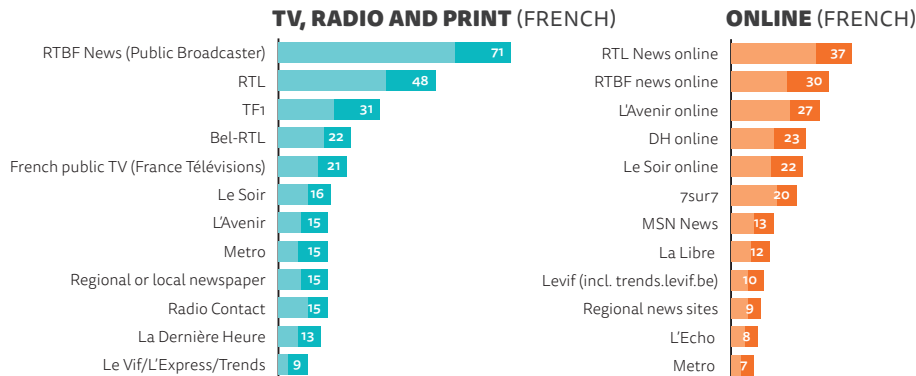
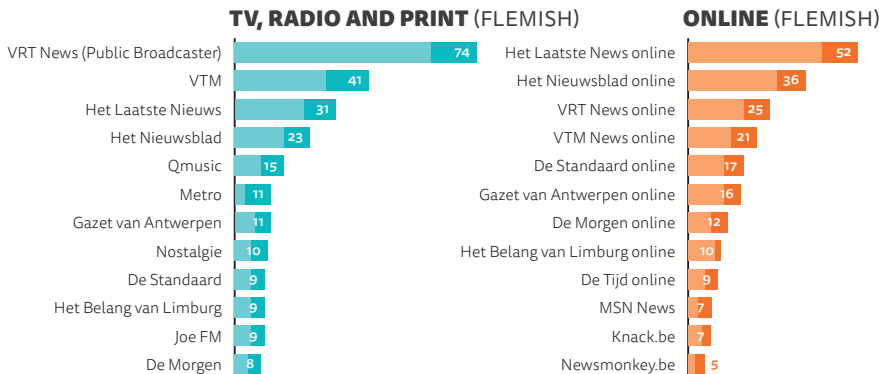
⁵⁵ <https://www.persgroep.be/en/news/de-persgroep-expands-its-participation-medialaan-and-sells-its-50-interest-mediafin-roularta>

⁵⁶ The methodology for the official press metrics of the Centre for Information on the Media has been updated, with the print and digital circulation numbers merged. It is not possible any more to distinguish digital from print readership

TOP BRANDS

% Weekly usage

- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



PAY

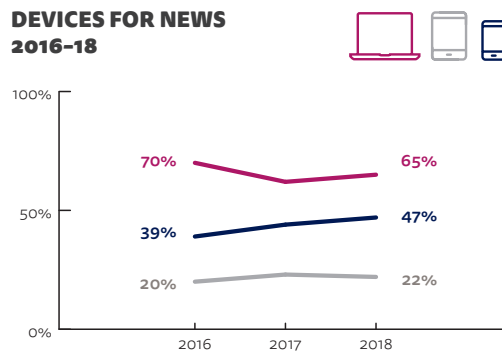
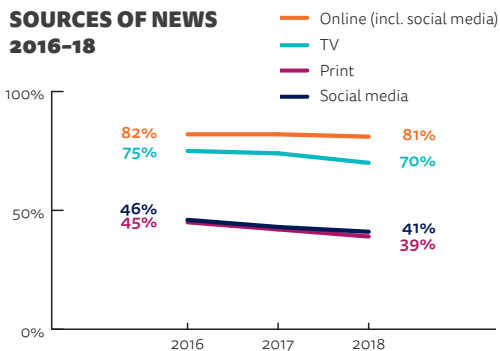
14% (+2)
(15th/37) pay for **ONLINE NEWS**

Flemish 13%
French 14%

AD-BLOCKER

25% (+2)
(24th/37) use an **AD-BLOCKER**

Flemish 20%
French 32%



DIFFERENT TYPES OF TRUST

News overall	News I use	News in search	News in social
53% (+5) 8th/37	59%	34%	21%
Flemish 62% French 44%	Flemish 66% French 51%	Flemish 37% French 29%	Flemish 23% French 19%

27% **SHARE NEWS**
via social or email

16% **COMMENT ON NEWS**
via social or website

BRAND TRUST SCORES (0-10) (FLEMISH)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
VRT News	7.65	7.76
Radio 1	7.33	7.94
De Tijd	7.33	7.96
De Standaard	7.24	7.81
Radio 2	7.21	7.97
VTM News	7.15	7.62
Het Nieuwsblad	6.98	7.37
Knack.be	6.93	7.5
De Morgen	6.89	7.38
Gazet van Antwerpen	6.79	7.25
Het Laatste Nieuws	6.73	7.01
Qmusic	6.46	7.14
Metro	6.39	6.76
Joe FM	6.33	7.08
Apache.be*	5.41	n/a

BRAND TRUST SCORES (0-10) (FRENCH)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
RTBF Info	7.11	7.36
Le Soir	6.93	7.26
La Première	6.85	7.3
La Libre	6.61	6.98
TF1	6.57	7.28
Vivacité	6.57	7.24
RTL News	6.45	6.89
L'Avenir	6.4	7.12
Bel-RTL	6.34	7.05
DH	6.22	6.6
Radio Contact	6.12	7.35
7sur7	6.04	6.75
Metro	5.96	6.77
MSN Actualités	5.42	6.36

* Note: No figure for users of Apache.be (did not meet 50 minimum threshold)

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	39% (-1)	65%
2	YouTube	16% (+1)	54%
3	WhatsApp	8% (+3)	34%
4	Facebook Messenger	8% (+1)	42%
5	Twitter	4% (-)	11%
6	Google Plus	4% (-)	9%

BULGARIA

Nearly 30 years after the fall of communism Bulgaria remains the poorest member of the European Union, deeply divided over old allegiances to Russia and new alliances with the West. The news media tend to take an increasingly partisan view of these issues, further polarising society while reducing overall trust in the news.

Now in his third term, Prime Minister Boyko Borisov is the longest serving leader since the communist dictator Todor Zhivkov. His administration has been tainted by a series of scandals involving party members and coalition partners, resulting in declining personal popularity for Borisov. In this process the mainstream media prefer to remain witness to events rather than hold those in power to account – except when it is in the interest of their powerful owners to do so. Not surprising, then, overall trust in the news is just 38%, one of the lower scores in our survey. Bulgaria has fallen in terms of press freedom (Index of Reporters Without Borders) to 109th place, from 68th in 2009.

Newspapers in Bulgaria have come under considerable financial pressure in recent years, despite pioneering successful 'hybrid tabloid' newspapers such as *24 Chasa* and *Trud* in the 1990s. These publications mixed serious reporting and analysis with gossip and scandals, attracting the interest of German group WAZ. But low incomes and competition from the internet led to a four-fold decline in circulation between 2003 and 2007. WAZ eventually sold their stake and other foreign investors such as Bonnier and Handelsblatt also pulled out in the wake of the global financial crisis. Four daily newspapers have had to shut down over the past three years and the publisher of the fifth one (*Standart*) recently walked out, dramatically handing his shares over to journalists. Only one publisher, EconoMedia, has actively invested in digital. Owning one of the most trusted weekly magazines, *Capital*, it also provides (so far) the only platform for paid content



with a subscription to premium digital and magazine content costing around 29 lev each month (€15).

Elsewhere, with advertising revenues continuing to fall, many news organisations have become increasingly reliant on funding from oligarchs or foreign foundations. This in turn has reduced independence and trust, with the media increasingly becoming something of a battlefield between Russia and the West.

A number of media companies get Western grants, for example, from the America for Bulgaria Foundation. Others receive money from Russia. The pro-Western media (*Capital*, *Mediapool*) tend to criticise Russia over its intervention in the Middle East, while ignoring evidence that Western weapons often find their way into the hands of Islamic States. Outlets openly siding with Russia have no hesitation in undermining pro-Western politicians by speculating about their sexuality or making insinuations about corruption.

Television remains an important source of news in Bulgaria, with the online sites of leading broadcasters most heavily used. The Nova Broadcasting Group runs a series of channels and websites including Nova TV (55% online reach) and *abv.bg* (48%), a popular news portal built on the back of Bulgaria's biggest email service. For many years, Nova was owned by Sweden's Modern Times Group, which invested heavily in both radio and online, including acquiring *vbox7.com*, the Bulgarian equivalent of YouTube. The group is in the process of being sold to the Czech billionaire Petr Kellner.

STATISTICS

Population	7m
Internet penetration	60%

BTV, the second most popular news broadcaster in our survey, also runs a series of TV channels, radio stations, and websites. It too is foreign-owned, having originally been established as a partnership between the Bulgarian mogul Krasimir Gergov and Rupert Murdoch's News Corp. A common feature among the leading TV channels is a reluctance to criticise the top political leaders, allowing statements by both the prime minister and the opposition leaders to go unchallenged.

Public broadcaster Bulgarian National Television (BNT) is less popular in terms of reach than commercial rivals, but remains the most trusted for news in our survey. However, the TV service has recently been accused of underplaying the size of anti-government protests, and continuing to employ a host who made a rude gesture towards an activist on an evening talk show. The broadcasting regulator, the Council for Electronic Media (CEM), is politically dominated by supporters of the ruling party.

Bulgarians are heavy users of social media and messaging applications. Viber enables free calls to family members that have emigrated and is popular due to the belief that encrypted conversations cannot be hacked.

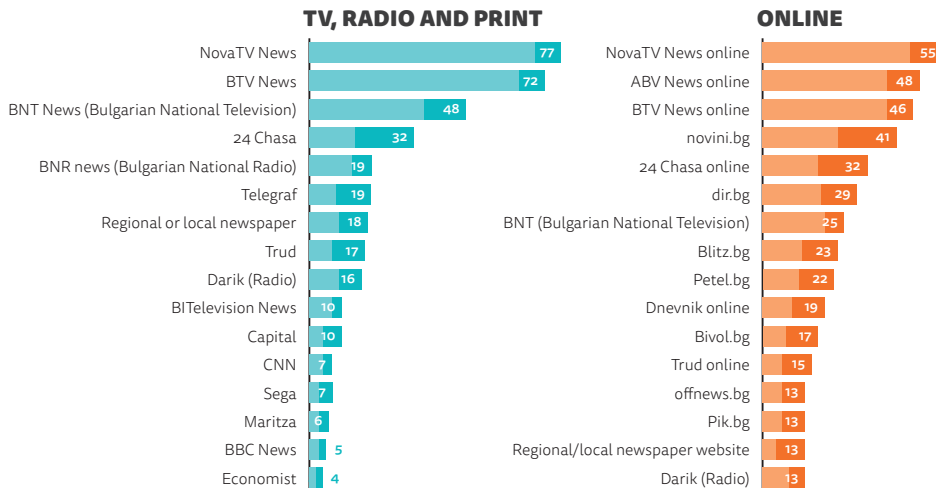
Stefan Antonov

Business journalist, (the Bulgarian) Economist, and former Reuters Journalist Fellow.

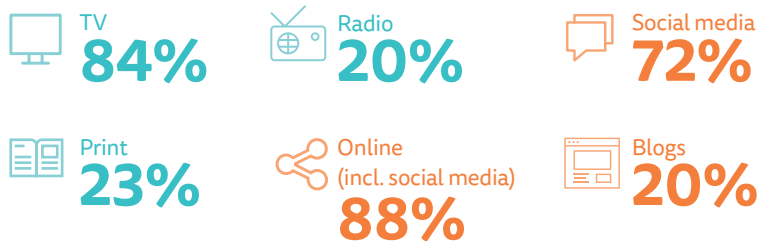
TOP BRANDS

% Weekly usage

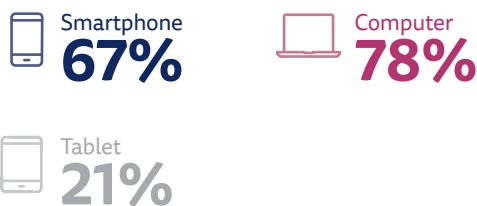
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



SOURCES OF NEWS



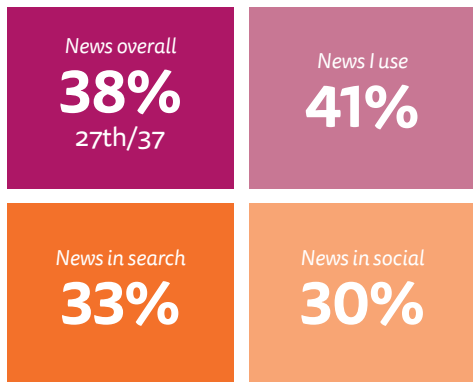
DEVICES FOR NEWS



TRUST

A third say they trust the news they find in search (33%) and social media (30%) – higher than many other countries – likely to be in part a reflection of low trust in the mainstream media outlets that people use themselves (41%).

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
Bulgarian National Radio	7.29	8.01
Bulgarian National Television	7.25	7.67
Nova TV News	7.22	7.6
BTV News	7.03	7.42
Chasa	6.33	7.01
Trud	6.13	7.06
Dnevnik	6.1	6.89
Sega	5.75	6.88
Offnews.bg	5.55	6.49
Bivol.bg	5.52	7.11
Blitz.bg	5.18	5.71
Pik.bg	4.5	5.33

8%
(30th/37) pay for **ONLINE NEWS**

25%
(24th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	73%	84%
2	YouTube	32%	70%
3	Facebook Messenger	18%	59%
4	Viber	14%	55%
5	Twitter	6%	14%
6	Instagram	5%	22%

52%
SHARE NEWS
via social or email



40%
COMMENT ON NEWS
via social or website



CROATIA

The Croatian media market is characterised by strong commercial television providers, a declining print sector, and a vibrant mix of traditional and alternative online websites.

In recent years the editorial independence of public service HRT has been negatively influenced by the editorial changes implemented by conservative Croatian Democratic Union (HDZ) government. Hopes that more moderate leadership might alleviate some of the damage to public service and non-profit media have so far not been realised. A small group of independent journalists remain at the public broadcaster HRT, but often find themselves struggling to maintain professional standards in the light of an increasingly conservative editorial policy. News audiences for both the television news service (HTV) and the radio section (HR) are up a few points from last year, but our data show that public trust in HTV news is lower than for commercial competitors.

Meanwhile there is continued concern about the non-profit media – mainly online news portals and magazines, whose funding has been reduced by the government in the previous period. Several successful crowdfunding campaigns, including that of the portal *Lupiga.com*, continue to show citizen support for alternative progressive media.

Television remains a critical source of news in Croatia with our data showing Nova TV (61%) as the top source of news, followed by the television branch of the Croatian RTL in second place (59%). The most significant ownership change in the media sector involved Nova, which was sold to the Slovenia Broadband company, part of the American KKR investment fund which also owns the N1 (cable) television and multimedia platform that



STATISTICS

Population	4.2m
Internet penetration	74%

operates in Croatia, Serbia, and Bosnia and Herzegovina. N1 Croatia has a growing audience (12%) and was recognised with the Miko Tripalo Democracy Prize for their contribution to democracy in Croatia in 2017, by the Centre for Democracy and Law Miko Tripalo, a progressive thinktank.

In the newspaper market, the most popular title is the tabloid *24sata* (36%) owned by the Austrian company Styria, followed by the left of centre *Jutarnji list* (30%), which is owned by Hanza Media, Croatia's largest print media company, along with the right-leaning *Slobodna Dalmacija* (10%).

Advertising spending has continued to decline for print (-8% 2015–16) and radio (-2%), but the overall advertising market increased in 2016 by 2% to reach 1.493 billion Kuna (€199 million). Advertising on the internet rose 27% in relation to the previous year, and television and outdoors rose by 2%.⁵⁷

Most online media rely on digital advertising with little evidence of digital subscription. Digital-born *Index.hr* remains the leading news website followed by the website of the daily tabloid extension *24sata.hr*. In the third place is again the online portal of the most popular non-tabloid daily *Jutarnji list*. While the legacy media in Croatia continue to attract the largest audience, a number of right-wing portals are also proving popular.

Dnevno.hr is a radical website which reached a fifth (21%) of our sample despite having the lowest trust of all the brands we surveyed. *Direktno.hr*, another right-wing portal, increased its reach to 14% (+3). These websites illustrate the growth in recent years of radical social and political conservative voices organised by NGOs, and linked to the more conservative parts of the ruling HDZ party and the Catholic Church. There are no comparable media on the left side of the spectrum, and the left-leaning online media in general have a much smaller following according to this study.

The issue of so-called 'fake news' has received increased attention in the past year, with Croatian fact-checking portal *Faktograf.hr* becoming a member of the International Fact Checking Network (IFCN). A brief flurry was caused in professional and academic circles by the government announcement that they will be working on a new law to prevent 'fake news' and hate speech on the internet. Nothing further was heard about this idea which was seen as a possible step towards censorship given that Croatia already has laws in place that cover hate speech against different ethnic and social minority groups.

Zrinjka Peruško

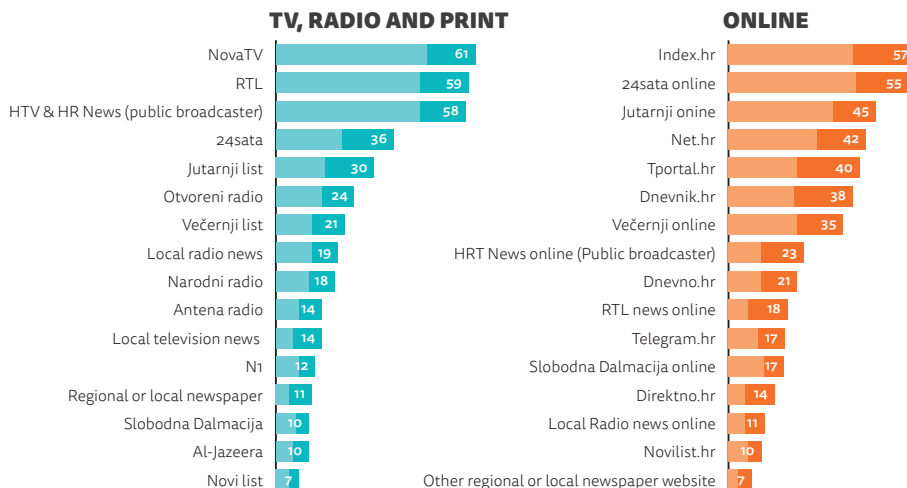
Centre for Media and Communication Research, University of Zagreb

⁵⁷ <https://www.bizit.hr/medijsko-oglasavanje-u-hrvatskoj/>; <http://hura.hr/istrazivanja/medijska-potrosnja-u-hr>

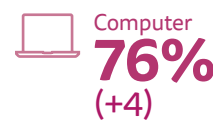
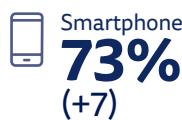
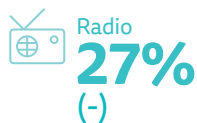
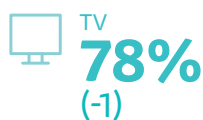
TOP BRANDS

% Weekly usage

- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



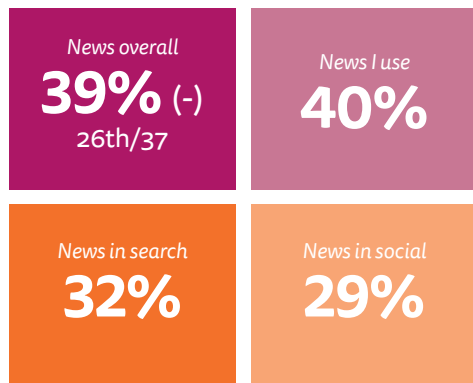
SOURCES OF NEWS



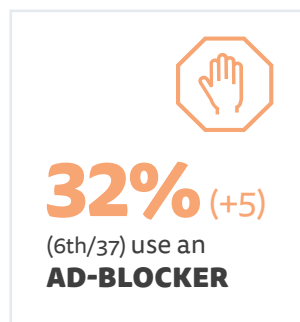
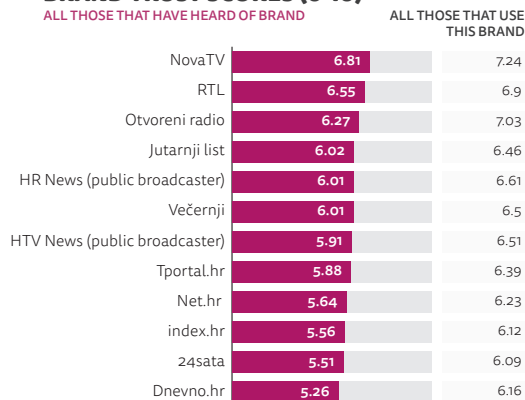
TRUST

Trust in news (39%) remains low, reflecting other survey research, which shows that interpersonal trust in Croatia is below the EU average. The most trusted news sources tend to be radio and television outlets rather than digital sources.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	57% (-)	75%
2	YouTube	28% (+2)	74%
3	Viber	12% (-2)	54%
4	WhatsApp	11% (+2)	46%
5	Facebook Messenger	11% (+2)	48%
6	Telegram	6% (+1)	11%



CZECH REPUBLIC

STATISTICS

Population	11m
Internet penetration	88%

The issue of online disinformation and ‘fake news’ dominated the debates about the Czech news media last year. There has been also growing concern over the independence of public service media, which have become a target of increasing attacks from various populist political actors.



The steady growth of GDP (+4.5%, the second-highest in the EU) has been the main driver of increasing advertising expenditures, which are up 10% on last year. Television again took the biggest share (46%), with online ad spending recording the biggest annual growth.⁵⁹

The circulation of Czech daily newspapers continued to decline, on average by -5.5%.⁶⁰ This trend, while slowing down in the last several years, has been observed for over ten years now and in consequence most national dailies are today selling 45–65% fewer copies than in the mid-2000s.⁶¹ Last year, only one paper – the financial daily *Hospodářské noviny* – managed to slightly increase its circulation. On the other hand, some new print titles have been launched, either as spin-offs from already existing online news projects (such as the monthly *Revue Forum* or quarterly *Info Lab*) or within more upmarket segments (the financial bi-monthly *E15 Premium*, or a quarterly magazine *Forbes Next*). In light of the ongoing economic struggles, publishers have welcomed the change in the VAT rate for newspapers and magazines from 15% to 10%, agreed by Parliament despite the President’s opposition.

The television market saw the departure of the Swedish-based multinational company Modern Times Group (MTG) which has sold its 50% stake in the second-biggest commercial broadcaster TV Prima, in a move that signals the further withdrawal of foreign ownership from the Czech news media market and its replacement by domestic proprietors with main interests in other business sectors. There has been intense speculation that the number one

player on the market, TV Nova, might soon follow a similar fate, after it emerged that its majority owner, Time Warner, is seeking to sell its acquisitions in Central Eastern Europe.

The leading web portal Seznam.cz, while continuing to lose market share to Google in search traffic, has been expanding its media business. Having launched the news site Seznam Zpravy in October 2016, it obtained a terrestrial TV licence for its own news channel Televize Seznam at the end of 2017. Other online competitors have attempted to increase their supply of original content as well, such as the internet TV Playtvak.cz which launched its own comedy series *Single Lady*.

The ranking of the top Czech news brands has not experienced much of a change in recent years; among the exceptions has been TV Barrandov, that has seen a notable rise in the amount of regular users (from 12% in 2015 to 19% this year). This has been arguably facilitated by TV Barrandov’s ever more partisan style of broadcasting, pandering to voters of populist and extreme right-wing parties and politicians. At the same time, the public service media have been subject to growing verbal attacks, including from President Miloš Zeman as well as the media mogul Andrej Babiš, who has been prime minister since November 2017. Following last year’s parliamentary elections, which strengthened the position of populist parties, there have been increasing concerns over the attempts to interfere with the political independence of public service broadcasting. Despite these challenges, the public service television

and radio continue to be among the most used and trusted news brands, and keep expanding their news services, particularly Czech Radio which in April 2017 launched a specialised online news portal iRozhlas.cz.

Partisan and alternative sites have continued to maintain their active presence in the Czech online news ecosystem – partly as a result of exposure via social media. Many of these sites have been labelled as disinformation websites by various NGOs as well as by the Centre against Terrorism and Hybrid Threats, set up by the Ministry of Interior in 2016. While *Parlamentnilisty.cz* (17%) attracts as many weekly online users as some mainstream news sites, the reach of the other web projects (pursuing anti-EU, pro-Russian, and a generally anti-liberal agenda), including Russian-funded *Sputnik.cz* (2%), remains limited.

The election campaigns in late 2017 saw heightened activity of disinformation and partisan websites, as well as hoaxes circulating on social media. In a pioneering attempt to target the financial incentives driving ‘fake news’, Seznam.cz announced in August 2017 that it was going to exclude known disinformation websites from its online ad service Sklik. Following a backlash, the company withdrew the plan; however it has now introduced new rules that ads will no longer appear on dubious sites on a blacklist maintained by an independent database *Konšpirátori.sk*.

Václav Štětka
Loughborough University

⁵⁹ <http://www.spir.cz/internetova-reklama-hlasi-rekordni-investice-za-lonsky-rok-vice-nez-23-miliard-korun>

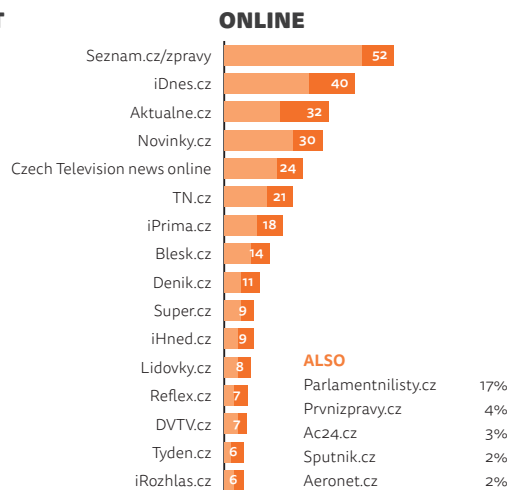
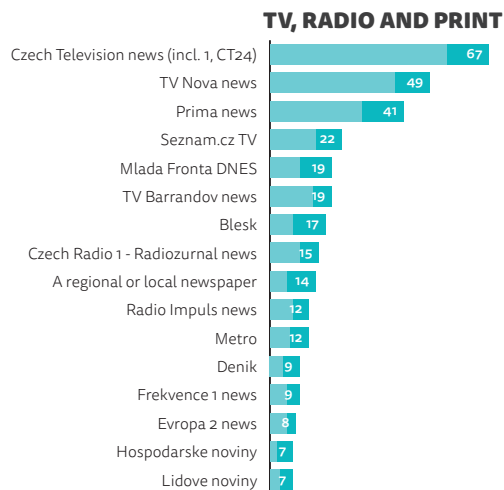
⁶⁰ <https://www.mediaguru.cz/clanky/2018/02/ucet-deniku-za-rok-2017-prodeje-klesly-o-5-5>

⁶¹ <http://www.nfnz.cz/aktuality/vyvoj-padu-prodeju-ceskych-zahranicnich-deniku-za-poslednich-12-let>

TOP BRANDS

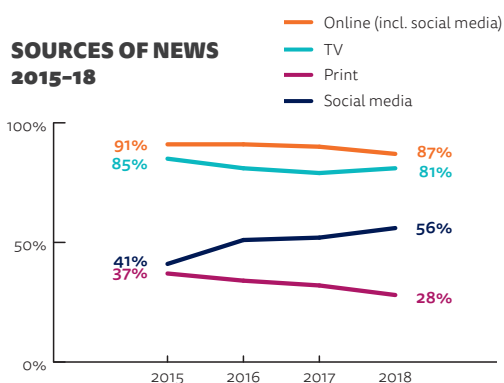
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

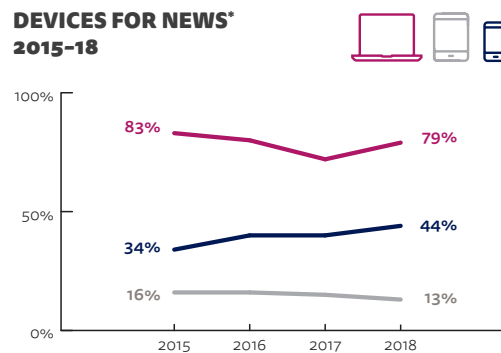


CHANGING MEDIA

Online media have continued to dominate as sources of news, while social media have gained further ground, widening the distance from print.



DEVICES FOR NEWS* 2015-18

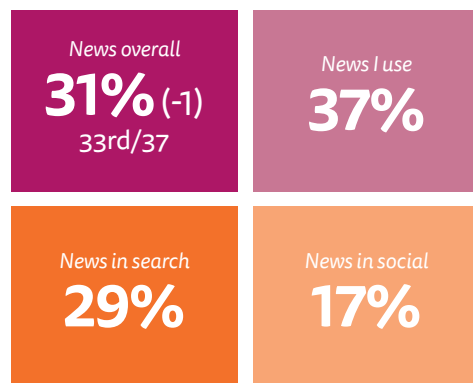


* 2018 computer data may be overstated - see methodology for more information

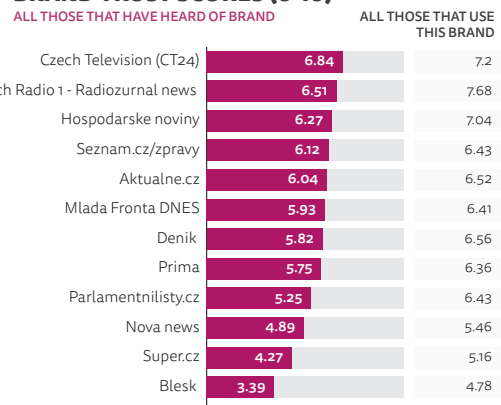
TRUST

Low media trust is linked to increasing polarisation and the impact of online disinformation related to partisan websites with links to Russian-based sources or funders. Ownership of most mainstream news outlets by politically connected oligarchs is another factor.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



PAY

8% (-)

(30th/37) pay for **ONLINE NEWS**

AD-BLOCKER

25% (+2)

(24th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	57% (+10)	77%
2	YouTube	26% (+5)	65%
3	Facebook Messenger	16% (+6)	47%
4	WhatsApp	7% (+2)	24%
5	Twitter	5% (+1)	11%
6	Instagram	4% (+1)	16%

42%

SHARE NEWS
via social or email



26%

COMMENT ON NEWS
via social or website



DENMARK

The media environment in Denmark is characterised by two public broadcasters (DR and TV2) and a national and local press partly dependent on state subsidies, but now a right-wing government is trying to redefine the balance between commercial and public media.

After a heated and often ideological debate, the right-wing coalition government decided in March 2018 to reduce the annual budget of the main public service institution (DR) by 20%, a cut to be gradually phased over the next five years. This move was accompanied by a decision, more widely approved across the political spectrum, to abolish the licence fee, deemed to be unfair towards the young and other low-income groups, and instead finance DR directly out of state taxation. TV2's revenues are drawn from advertising and subscription fees.

These cuts come at a time of increasing concern about the challenges to the Danish culture and language in an increasingly globalised media landscape. One important catalyst for this debate was the report *The Impact of International Actors on the Danish Media Market*, by the Danish Agency for Culture and Palaces, published in September 2017, which analysed the forces which are eroding the Danish media system. The report highlighted ways in which global tech giants are affecting advertising revenues of private media, but by implication also cultural production, distribution, and consumption, including news, demonstrating how these global giants are using the collection of data to drive massive and irreversible change. The report recommended robust and collaborative strategies to ensure the continued sustainability of cultural and journalistic production, and a complete rethink of media regulation and subsidy.

After the takeover of Denmark's oldest newspaper group Berlingske by the Belgian De Persgroep in 2016, and Berlingske's acquisition of the free newspaper *MetroXpress*, the company's new CEO, Anders Krab-Johansen, carried



STATISTICS

Population	5.7m
Internet penetration	97%

out a dramatic cost-cutting operation and digital turnaround, in which the page production of all the group's newspapers was outsourced. The tabloid *BT* and free daily *MetroXpress* were partly merged, and *Metro's* online news site and the fledgling online Kids News were closed.

Payment for online news has stagnated at 15% since 2017, placing Denmark at 14th out of 37 countries. All major newspapers use freemium models online and are struggling to increase payment levels for online news. Major newspapers have increased minimum online subscriptions to around €35 per month, and have simplified a number of online subscription packages to include the complete e-paper.

Only two newspaper groups, JP/Politikens Hus and Børsen, could boast a profit without counting the state subsidy that still supports commercial news media. *Berlingske*, *Information*, and regional group Sjællandske Medier, would have been in the red without the subsidy, and many others announced losses despite it.

The state subsidy is given to private news media in proportion to the number of journalists they employ, other criteria being a socially diverse readership and the creation of democratically important political and cultural content. Typical annual subsidy levels are: niche nationals like *Kristeligt Dagblad* and *Information* €3.3m; broad and tabloid national dailies €2.3m; regional daily €1.7m; local daily €400,000; born-online €500,000.

Zetland is one digital-born site that has attracted international interest in the last year for both its innovative approach and commercial success. It publishes three to

four news articles daily, focusing on long-form stories and in-depth articles. It has increased its subscriptions to 10,000, partly as a result of making all stories available in audio, read by the author.

Responding to the difficulties of reaching young groups, a small handful of news sites are seeking – with the help of innovation subsidies – to appeal to children, teenagers, and young adults through specially targeted content: *Format* (20–30 year olds, JP/Politiken); *Koncentrat* (teenagers, aiming for school subscriptions); *Ultra Nyt* (7–12 year olds, DR channel 3, online and TV); *TV2* (20–30 year olds, videos through social media platforms).

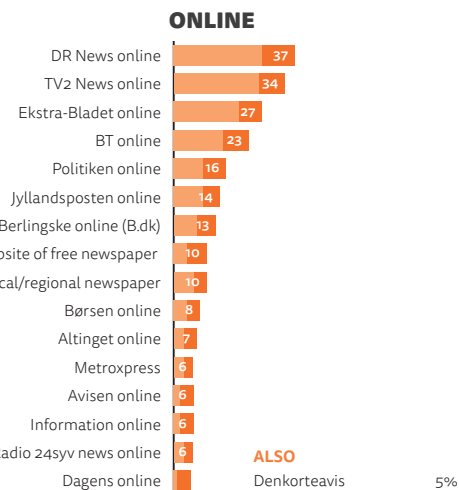
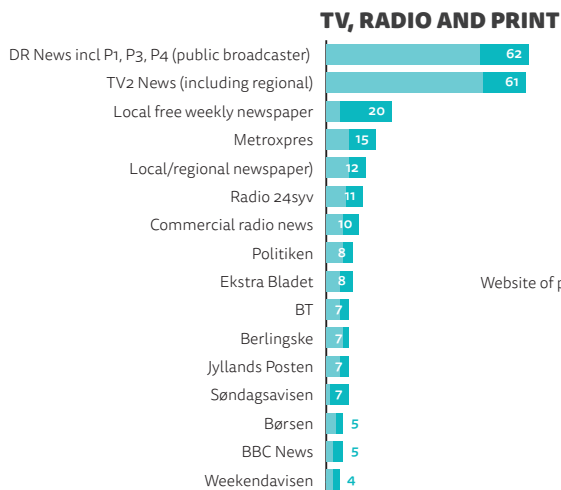
Newspaper readership continued to drop by approximately 10% on weekdays and approximately 15% on Sundays (industry figures). Our reach figures are near-stationary, with both offline and online reach displaying the same rankings as 2017, with *Radio 275sv* continuing its upward movement; most fluctuations are at plus/minus 1–3 points. Smartphones continue to grow in importance as a news platform (+7). Television, printed newspapers, and online sources of news are plateauing or have dropped slightly since 2017, while social media continue to decline as a source of news (-7 with Facebook declining 5 points), presumably as a consequence of a changed algorithm and increasing concerns about 'fake news'.

Kim Christian Schrøder and Mark Ørsten
Roskilde University

TOP BRANDS

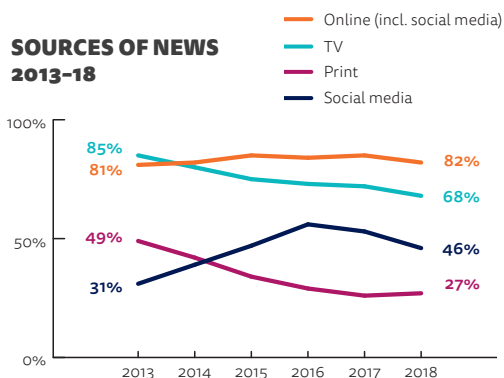
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

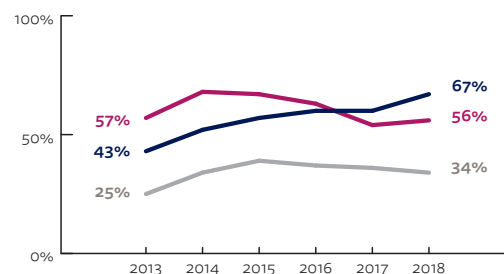


CHANGING MEDIA

The number accessing news via smartphone has now outstripped those using computers. Social media news use has started to decline (-8 points) following years of growth while print newspapers sell fewer copies than in other Nordic countries.



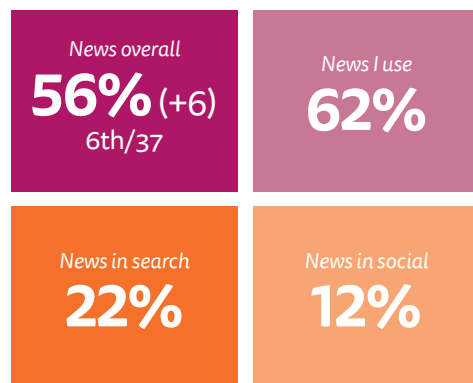
DEVICES FOR NEWS 2013-18



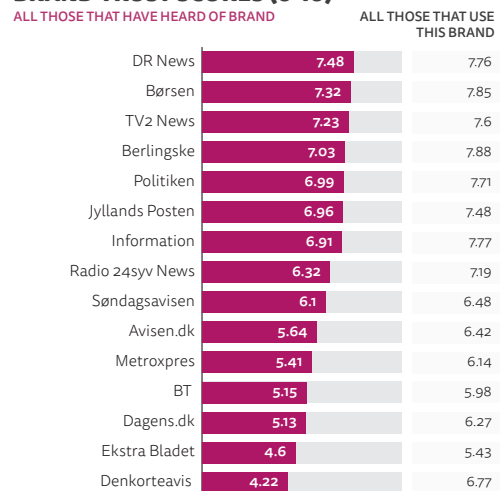
TRUST

It is striking that quality news brands across the public service/private media divide (e.g. DR, TV2, Børsen, Berlingske, Politiken) have similarly high trust scores. Tabloids tend to be less trusted along with far right-wing news outlet Denkorteavis.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



15% (-)
(14th/37) pay for **ONLINE NEWS**

26% (+2)
(20th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	34% (-5)	73%
2	Facebook Messenger	7% (-)	52%
3	LinkedIn	6% (+1)	28%
4	YouTube	6% (-1)	51%
5	Twitter	5% (+1)	11%
6	Instagram	4% (+1)	32%

20%

SHARE NEWS
via social or email



13%

COMMENT ON NEWS
via social or website



FINLAND

The news environment is characterised by a strong regional press, strong public broadcaster (YLE), one important national daily (*Helsingin Sanomat*), and two popular evening tabloids, both reaching over half of the adult population.

The established Finnish media companies have sustained their strong and trusted audience position over the last year with almost no threat from foreign news media. The Finnish language and small market seem to shield national news brands somewhat from international competition. One sign of a potential change was, though, the rise of MSN News from 6% in 2017 to 9% weekly reach this year. It offers its content in Finnish as well as English. The most popular digital-born player, *uusisuomi.fi*, a national news and blog site, retained its 9% weekly reach.⁶² Other reasons for the popularity of traditional Finnish media companies online are the amount of free content still available (especially from the evening tabloids and YLE) combined with bundled subscriptions and a strong reading tradition.

At the same time, newspapers' print circulations have continued their decline – a serious problem for their owners because most revenue still comes from print. This has encouraged Finnish media companies to find business in new areas, making use of their user data and marketing skills. Online marketplaces (cars, homes, recruiting) have increased their importance in Finnish media companies' portfolios.

Overall, 2017 was a relatively good year for the major Finnish media companies in terms of profitability. The operating income for Sanoma Media Finland was 12% (up 33%), Alma Media 14% (up 45%), and Keski-suomalainen 8% (up 28%).⁶³ In 2018, Alma Media sold its newspaper and distribution business in Lapland to Kaleva, thus limiting its focus in local and regional media in Tampere and Pori regions. In



STATISTICS

Population	5.5m
Internet penetration	93%

2017, Kaleva had already strengthened its position in Northern Finland by buying three local papers near Oulu from Alma Media.

Some positive signals also came from digital subscriptions, with the share of paying customers growing to 18% after staying around 15% in 2014–17. Future willingness to pay among non-subscribers also rose 5 percentage points to 11%. This may be due to the tightening of paywalls and younger readers becoming accustomed to paying for digital services. *Helsingin Sanomat* said it increased its subscribers (including digital) for the first time in 25 years.

The percentage paying for online news is higher than in most countries, which may be partly because Finnish newspapers eased their print readers into digital by bundling subscriptions at a similar price – or just a little higher – than print-only subscriptions.

The media in Finland is waiting for the government to decide to cut the 24% VAT for digital media to the same level as print subscriptions (10%). This has been delayed because the government, for its part, is waiting for the EU's decision to let member states determine their own VAT level.

In 2017 YLE streamlined and refocused its organisation, cutting 6% of its permanent staff. The discussion about its position and impact on private news media continued, especially about its online services which competitors say lead to unfair competition

since they need no ads or subscriptions. Industry body Finnmedia has asked the EU Commission to investigate if public funding for YLE's text-based content counts as forbidden 'state aid'. However, a parliamentary committee has suggested that index-linking of YLE's funding should be restored from 2019. Following suggestions of a working group, the Ministry of Transport and Communications granted a €3m allowance to private MTV for securing plurality in television news.

The most popular partisan site in Finland is MV-Lehti, which offers content with an anti-immigration and anti-legacy-media slant, often using offensive irony⁶⁴. Almost half (48%) of our sample said they were aware of the site but only 5% had used it in the previous week. The site rebranded as MV-media at the beginning of 2018, and changed its leadership, following a police investigation into alleged incitement against an ethnic group and other allegations.

Despite such attempts to erode trust in established players, the legacy media have sustained their reputation for being trustworthy. This is probably due to the low level of polarisation in Finnish society and media. A relatively strong professional culture among journalists which values objectivity and independence may have had an impact too.

Esa Reunanen

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⁶² Although *uusisuomi.fi* has adopted its name from a former newspaper it is a new enterprise and is classified here as a pure player.

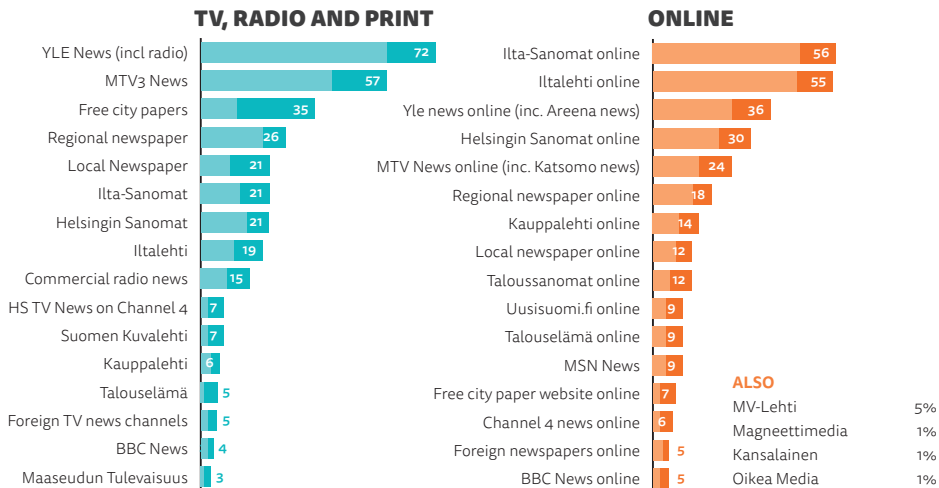
⁶³ Source: Suomen Lehdistö, Mar. 2018.

⁶⁴ YLE article on the track record of MV-Lehti <https://yle.fi/aihe/artikkeli/2015/03/23/valheenpaljastaja- uutista-helppo-matkia>

TOP BRANDS

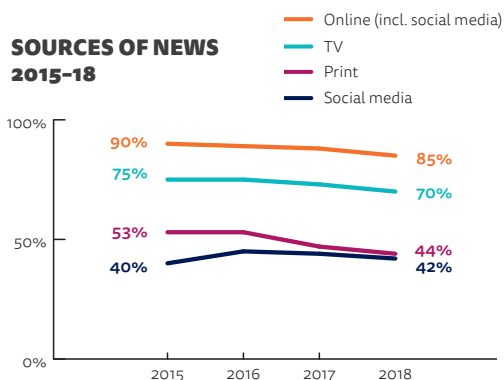
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

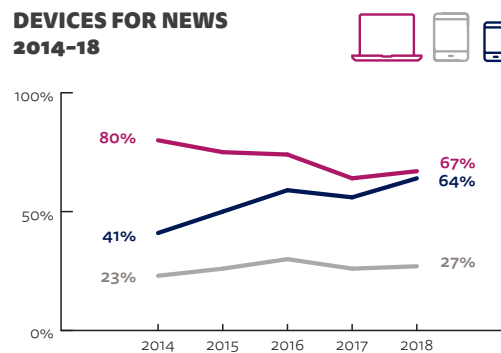


CHANGING MEDIA

There have been no major shifts in consumption over the last year, with the exception of continued decline in the use of print newspapers and magazines. This has fallen by 9 percentage points in the last three years. News consumption on smartphones continues to rise sharply to 64%.



DEVICES FOR NEWS 2014-18



TRUST

The high level of trust is probably due to the low level of political polarisation in Finnish society and media. For all the biggest newspaper and television brands (apart from the evening tabloids), the share of those that do not trust their news (score less than 5) is less than 10%.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



18% (+4)
(7th/37) pay for **ONLINE NEWS**

25% (+1)
(24th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	33% (-2)	71%
2	YouTube	15% (+4)	66%
3	WhatsApp	10% (+2)	59%
4	Twitter	7% (+2)	16%
5	Suomi24	5% (-)	19%
6	Instagram	4% (+2)	31%

30%

SHARE NEWS
via social or email



17%

COMMENT ON NEWS
via social or website



FRANCE

A youthful wind blows in France under the presidency of 40-year-old Emmanuel Macron. He and his government have big media targets: they intend to introduce an anti-‘fake news’ law and also reform the state-owned broadcaster.

During the 2017 presidential election, online and TV were equally popular. But in 2018, TV regained a slight lead as the most important source of news. Even TF1, the most watched channel in France, is suffering from new competition and more on-demand viewing. It has been demanding several million euros in satellite distribution fees from telecoms giant Orange (which provides connected TV to 11m French households), Canal+ (6m), and Free (5.5m). The three companies said they were shocked since TF1 is free to watch. Canal+, part of Vivendi, responded by cutting the signal for almost a week. TF1’s audience figures fell immediately and the channel was overtaken for a while by its main competitor France 2, part of the state-owned France Télévisions.

But France Télévisions is caught in another storm. Together with Radio France and the international facing France Médias Monde (which in turn includes France 24 TV and RFI radio), it forms the largest part of the fragmented French public service broadcasting landscape and has been strongly criticised by President Macron. He has made no secret of his desire to see reforms to management, reductions in costs, improved programmes, and increased multimedia integration. The BBC seems to be his model, with its international reach and multi-platform capabilities. In truth, France Télévisions, Radio France, and France Médias Monde are not well integrated, with the exception of franceinfo. Created in 1987 as a breaking news radio service, it expanded last year to become an integrated news outlet across radio, a new TV news channel, and incorporating the mobile news service formerly called France TV Info, and is doing well online (now third in our rankings).



STATISTICS

Population	65m
Internet penetration	87%

On top of all that, Mathieu Gallet, CEO of Radio France, had to leave his role after being convicted of corruption, with his successor, Sibyle Veil, an internal candidate, appointed in April. Meanwhile there are suggestions that a reformed public service structure might include an overall CEO sitting above the existing chief executives of each entity.

CNews, a live TV channel owned by Canal+, saw its influence wane after a long-running strike led to the departure of the editorial team. Rival networks LCI, part of the TF1 group, and market leader BFM TV shared the spoils.

One of the most talked about media initiatives of the year was the launch of Le Media, a partisan digital operation. Set up by people behind leftist politician Jean-Luc Mélenchon, it made a significant impact, riding on a wave of distrust against legacy media. But several key people left and aired their criticisms via the traditional media they had previously denounced.

Newspapers continue to struggle with declining circulation and advertising revenues but some attempts to charge for online content are beginning to pay off. *Le Monde* returned its first operating profit for many years with a 44% increase in digital subscriptions, which have overtaken print subscriptions for the first time.⁶⁵

A number of printed magazines were launched in the last year: *Vraiment* (general news), *Dr Good* (health), *Miaou* (cat news), *Perma Gaia* (environmentalism). One ad-free current affairs weekly, *Ebdo*, closed just two months after launch. It had

published allegations of sexual crimes against a government minister, which led to an investor backing out.

Meanwhile, Emmanuel Macron has pledged to introduce a new law to fight the spread of ‘fake news’, which he says threatens liberal democracies. The law could ban false stories from social media platforms, particularly during French elections and include more transparency about sponsored content. Macron himself had been the target of a number of ‘fake news’ allegations distributed online during the presidential election campaign.

Mediapart, a subscription-based investigative and online web publication with 140,000 subscribers, marked its tenth anniversary in April 2018 on the day that former President Nicolas Sarkozy was taken into custody over allegations that former Libyan dictator Muammar Gaddafi had funded his 2007 election campaign. Those allegations had first been published by Mediapart six years earlier, in 2012.

Many podcasts have been launched, most addressing a niche: *La Poudre* (for girls), *Transferts* (testimonies), *Les Plants* (gardening), *Entre* (about a girl starting high school), and many others – a new way of exploring audio journalism on mobile.

Alice Antheaume

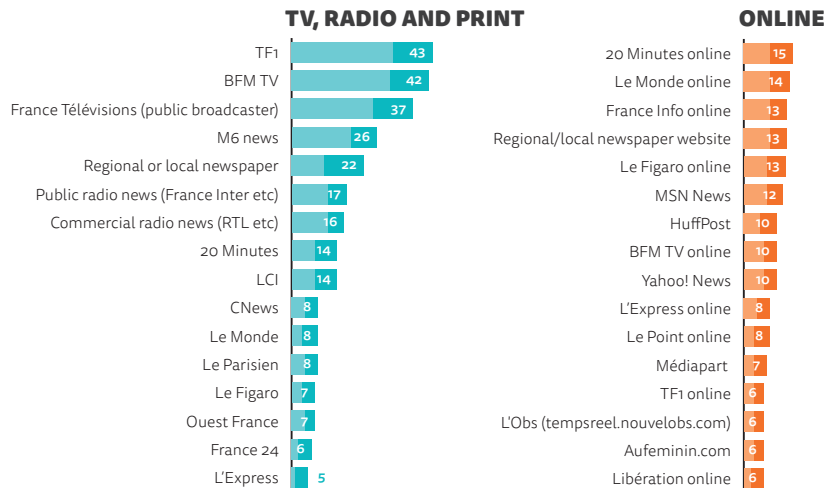
Executive Dean, Sciences Po Journalism School, Paris

⁶⁵ https://www.lemonde.fr/actualite-medias/article/2018/04/12/2017-une-annee-de-croissance-pour-le-groupe-le-monde_5284379_3236.html

TOP BRANDS

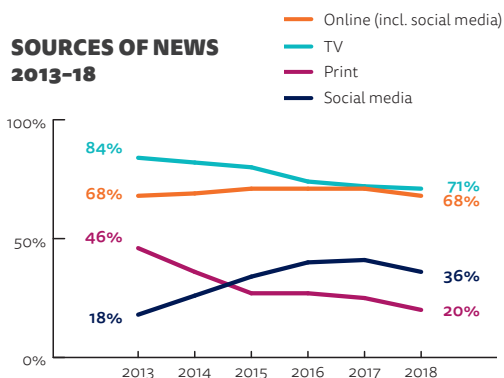
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

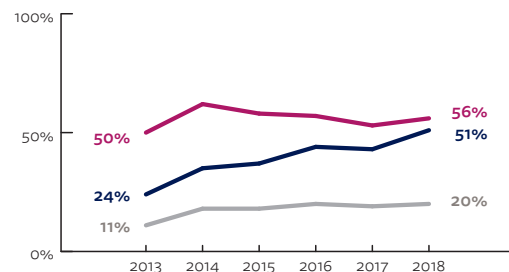


CHANGING MEDIA

The printed newspaper and news magazine sector remains in crisis with readership halving in the last six years (46% to 20%), but many former newspapers (Le Monde, Le Figaro) are leading the charge online. TV news remains important but viewership continues to fall year by year.



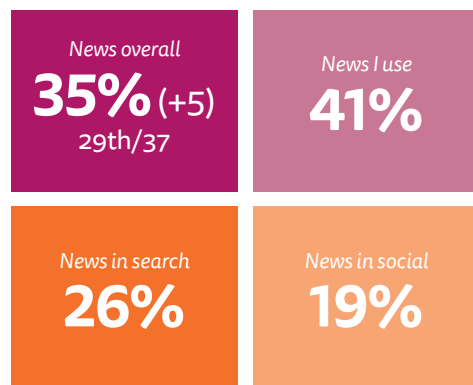
DEVICES FOR NEWS



TRUST

Trust in news in France is low (35%) compared with other European countries. Last year saw a major debate about the role of the platforms, especially Facebook, in disseminating 'fake news'. This helps to explain why trust in social media is lower still (19%).

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
Le Monde	6.47	7.54
France Télévisions news	6.1	6.43
L'Express	6.04	6.89
Le Point	5.99	6.89
Le Figaro	5.98	6.11
L'Obs	5.96	6.91
Le Parisien	5.95	7.1
BFM TV	5.9	6.75
Médiapart	5.89	7.46
Libération	5.87	6.74
M6 News	5.86	6.49
TF1 News	5.84	6.64
20 minutes	5.79	6.59
Le HuffPost	5.69	6.7
Brut	5.28	7.18

11% (+1)
(20th/37) pay for **ONLINE NEWS**

34% (+3)
(3rd/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	41% (-2)	63%
2	YouTube	22% (+3)	51%
3	Facebook Messenger	10% (+3)	31%
4	Twitter	9% (-)	16%
5	Snapchat	6% (+3)	15%
6	WhatsApp	6% (+1)	19%

31%
SHARE NEWS
via social or email

20%
COMMENT ON NEWS
via social or website

GERMANY

Germany is one of the first countries in the world to implement controversial laws to combat online misinformation while public broadcasters have been facing growing criticism over their response to a resurgent right-wing.

The Network Enforcement Act, commonly known as NetzDG, took full effect at the beginning of 2018 and requires online platforms like Facebook, Twitter, and YouTube to remove illegal content – or face fines of up to €50m. But the law has been controversial in Germany with some saying it could lead to inadvertent censorship or curtail free speech. In an early test, a far-right member of parliament had her Twitter account suspended and Facebook content removed shortly after posting an anti-Muslim message.

Facebook alone has hired over 1,000 German-language moderators to review content that has been flagged by users in 'deletion centres' in Berlin and Essen.⁶⁶ But while there is general agreement that platforms should do more, concern focuses on whether legal content could also be removed, if Facebook, Google, and Twitter act conservatively to avoid fines. Germany's biggest newspaper, *Bild*, has called for the NetzDG to be scrapped.

The emergence of the far-right Alternative für Deutschland (AfD), as the third strongest party in parliament following federal elections has led to intense debates on how the media should cover their often extreme political views. While some argue that high media exposure builds unwarranted attention, others say that growing public support for right-wing parties cannot be ignored. This issue has been a particular dilemma for public service broadcasters, which have been criticised for suppressing debates over immigration and distorting the views of right-wing parties.



STATISTICS

Population	81m
Internet penetration	90%

Despite this, our data show that public service providers like ARD and ZDF remain the most trusted news brands in Germany along with regional newspapers. Tabloid newspapers and digital-born portals tend to have less trust. More generally half of German internet users (50%) say they trust the news most of the time, with four in ten (61%) trusting the media they use. By contrast, fewer than a fifth (18%) say they have confidence in the content they find in social media. Anti-establishment websites like *Junge Freiheit*, *Politically Incorrect* (PI) news, and *Breitbart Germany* attract attention in the media and especially in social media but are used by a small proportion of Germans.

Meanwhile public broadcasters are facing renewed attempts from commercial publishers to restrict their activities online. Newspaper groups say that free public service content makes it impossible to charge for online news despite limited evidence.⁶⁷ A court ruling at the end of 2017 supported publisher complaints that ARD's popular *Tagesschau* app is too 'press like' because it contains too much text. Public broadcasters are now reshaping their apps to contain more video, even though Reuters Institute research (see p.29) consistently shows that most consumers prefer text when consuming online news.

In the print market, mergers of newspapers and pooling of editorial departments continues, cutting costs but sometimes at the expense of consumer choice.⁶⁸ Although digital advertising remains the

most important business model, more newspapers are shifting their strategies to online subscriptions. In May 2018, *Der Spiegel* launched *Spiegel+*, with a monthly subscription (€19.99) allowing access to exclusive online content and articles from the print edition. At the beginning of 2017 the Funke Group launched a freemium model for five of their regional online newspapers. According to PV Digest, paid content revenues in the media sector rose 16% in 2017 to €320m. The largest share of this belongs to Axel Springer's *Bild* (9%) with the Zeit-Group increasing their sales by 3%, due to last year's successful launch of the paid content model Z+. Even so, overall progress remains slow overall with fewer than one in ten of our sample (8%) paying for online news.

The use of ad-blockers increased by 5 percentage points in the last year to 33%, as the dispute over the legitimacy of the software rumbles on. Media companies have been challenging the practice of filtering out certain advertisements (blacklisting) or redisplaying them after paying a fee (whitelisting) in the courts. Rulings on the issue have so far been contradictory, and the Supreme Court will now be asked to make a decision.

Sascha Hölzig and Uwe Hasebrink

Hans Bredow Institute for Media Research, Hamburg

⁶⁶ <https://www.theguardian.com/world/2018/jan/05/tough-new-german-law-puts-tech-firms-and-free-speech-in-spotlight>

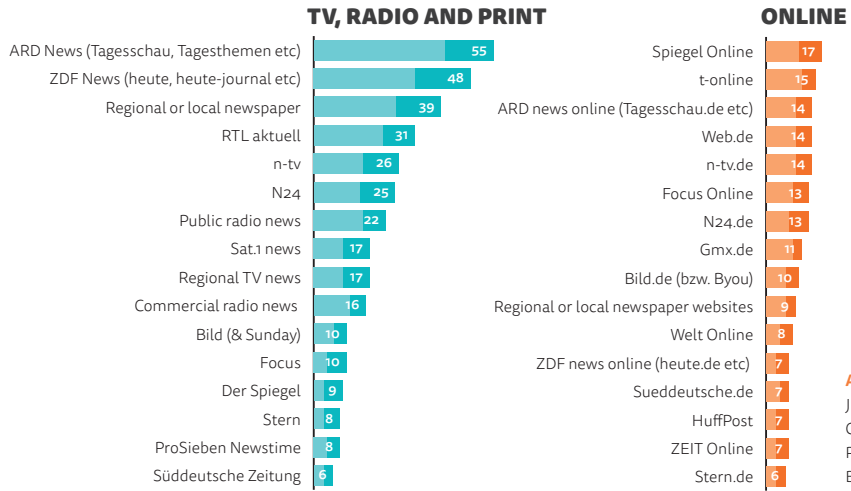
⁶⁷ Richard Fletcher and Rasmus Kleis Nielsen, 'Paying for Online News', *Digital Journalism*, 5(9) (2017): 1173–91.

⁶⁸ Landesanstalt für Medien in NRW, 'Medienkonzentrationsbericht 2016/2017' (Düsseldorf: Landesanstalt für Medien in NRW, Formatt Institut, 2017), <http://www.lfm-nrw.de/service/berichte/medienkonzentrationsbericht.html>

TOP BRANDS

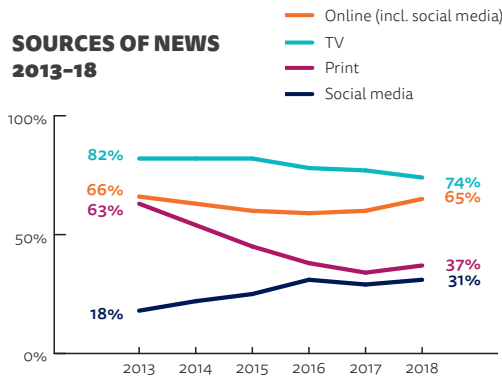
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

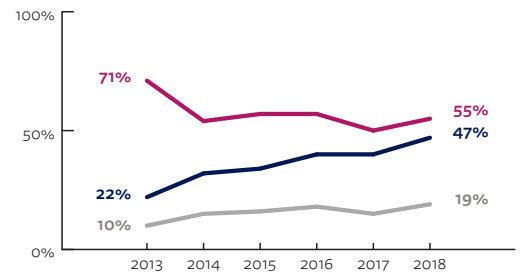


CHANGING MEDIA

Television remains the most widely used source of news, though numbers watching continue to decline (-3) while use of the internet for news has grown significantly in the last year (+5). About a third of our sample (31%) uses social media for news, fewer than in other countries.



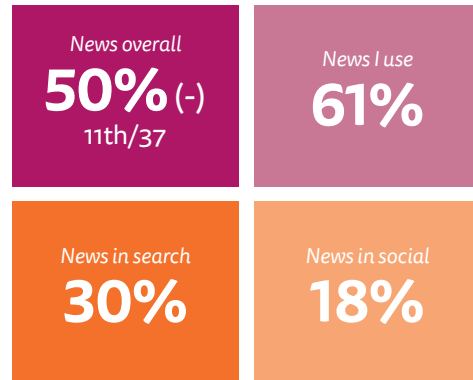
DEVICES FOR NEWS 2013-18



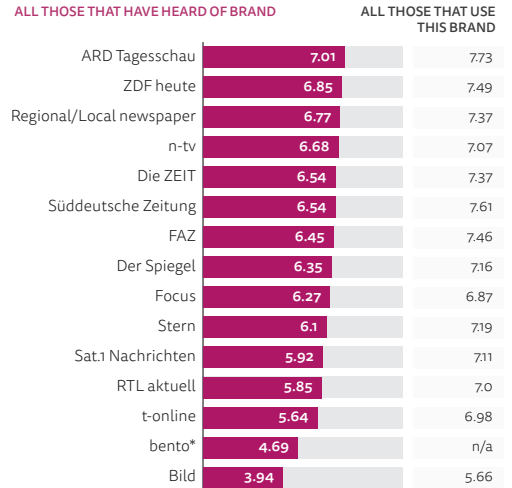
TRUST

Germans have relatively high trust in the news (50%) but 2018 data show that the proportion of those who do not trust the news media has increased slightly. Other studies have also found indications of growing polarisation in terms of media trust.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



* Note: No figure for users of bento (did not meet 50 minimum threshold)

8% (+1)
(30th/37) pay for **ONLINE NEWS**

33% (+5)
(4th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	24% (+1)	52%
2	YouTube	15% (+1)	52%
3	WhatsApp	14% (+2)	60%
4	Twitter	5% (+1)	13%
5	Facebook Messenger	4% (+1)	25%
6	Instagram	3% (+1)	16%

21%
SHARE NEWS
via social or email

14%
COMMENT ON NEWS
via social or website

GREECE

The media market in Greece is characterised by a TV market in turmoil, a weak print sector and some of the highest use of social media and digital born outlets in our study. Trust in the news is extremely low.

The saga of TV relicensing rumbles on, creating uncertainty for operators and viewers alike. Reducing the number of national licences to four was the first controversial media intervention by the government in 2016, though after the Council of State ruled that the independent regulator should oversee the process, seven licences opened up, with six media groups having applied so far. One broadcaster caught in the crossfire is MEGA, the oldest and for many years largest commercial channel in Greece. It has been reduced to broadcasting reruns of hit TV series in an attempt to pay off part of its debt. Ivan Savvidis, a Greek-Russian businessman, ex-Duma member with ties to Kremlin, bought Epsilon, a national broadcaster, that has applied for a nationwide licence.

The deep crisis in the print market in Greece continues. The circulation of all Sunday newspapers during a typical week in 2018 is down by 75% compared to a typical week ten years ago.⁷⁰ But despite this, there have been three national newspaper launches this year: *Nea Selida*, the relaunch of the legacy newspaper *Ethnos*, and *Fileleutheros* – a print version of the digital-born *liberal.gr*. So far, the success of these new entrants has been limited. Greece also has eight national daily sports newspapers and two news-related radio stations were launched in the past year in the Athens market: a radio version of the newspaper *Proto Thema*, and 24/7radio, from the 24MEDIA group. Meanwhile, the radio station *To Vima* was shut down during the takeover of the DOL conglomerate by the company of Evangelos Marinakis.



The Greek online news market is congested and highly disrupted. Most of the online news brands in Greece are digital-born including *Newsbomb* (34%), *In.gr* (26%), and *News247* (26%). When making the transition from offline to digital news, Greeks tend to prefer non-traditional brands, unlike users in most other European countries, partly as a result of the low trust in the legacy news media and the increase in political polarisation during the financial crisis. Among the top digital-born news websites in Greece, but also in the long-tail list of the most visited news websites, we see a number of websites that engage in sensationalism. Many are preaching to the choir of left or right-wing partisans, reaching sometimes extreme levels of conspiracy and hoax reporting while others are focused on click-bait and social media distribution. Unfortunately, these phenomena are not limited to small websites.

The government, in an attempt to regulate this chaotic market, has launched a register for online media for which approved outlets will be eligible for state advertising and to access a service for tracking plagiarism which is a problem in the Greek news media landscape. The Minister of Digital Policy said that the government is discussing the possibility of a law against the spread of false information, while accusing traditional outlets of publishing 'fake news' against the government.⁷¹

STATISTICS

Population	11m
Internet penetration	69%

Greece is one of just three countries (out of 37) where social media news use is higher than TV use for news among the population with an internet connection. While Facebook still dominates, we see a slow shift towards private messaging apps for reading, posting, and commenting on news, as in many other countries. In Greece, the most used messaging apps for news are Facebook Messenger (22%) and Viber (14%).

Very few people pay for online news in Greece. The economic situation, the lack of trust in news, the lack of culture for online payments as well as the low number of paywalls in Greece are some of the reasons for minimal levels of online subscription (6%). At the same time, Greece is a world leader in ad-blocking use (42%), with even higher numbers for those aged below 35 (57%). Two ad-free experiments in the Greek landscape have been the donation-based *ThePressProject* and the subscription-based website *insidestory.gr*. But overall, the prevalence of ad-blocking software, combined with the very high use of social media platforms for news, portray a challenging landscape for online news publishers in Greece.

Antonis Kalogeropoulos

Research Fellow, Reuters Institute for the Study of Journalism

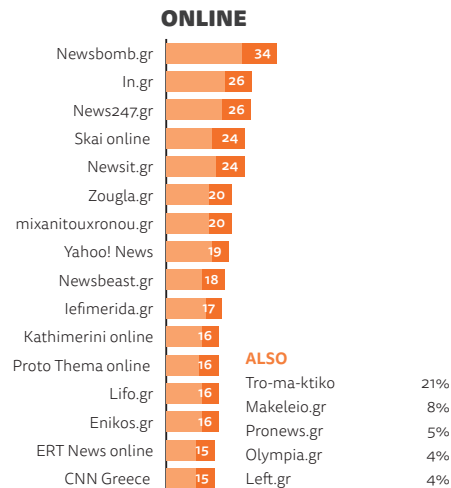
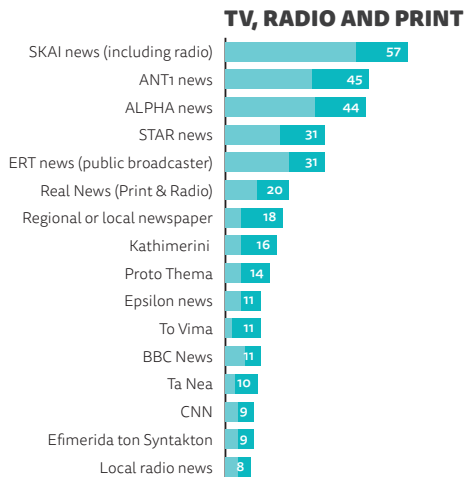
⁷⁰ Data from <http://www.argoscom.gr> and www.eihea.com.gr

⁷¹ <http://www.avgi.gr/article/10842/8739328/n-pappas-pleon-schediazoume-to-aurio-apo-semera>

TOP BRANDS

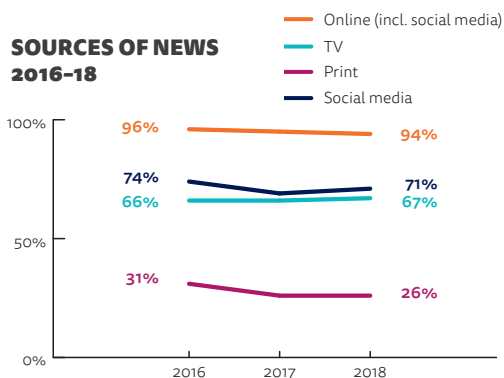
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
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online brands

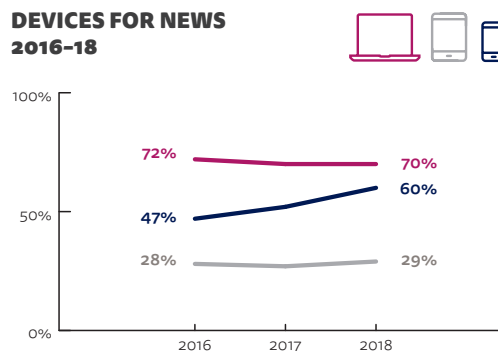


CHANGING MEDIA

Websites and social media remain the most frequently accessed source of news in Greece, though television remains popular with older groups. Smartphones have become a more popular way to access news over the last three years (up 8 percentage points) approaching reach from computers and laptops.



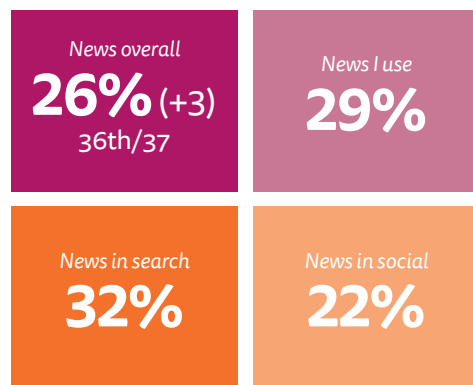
DEVICES FOR NEWS 2016-18



TRUST


Trust in news in Greece is consistently one of the lowest in our study at just 26%. Brand trust scores show little difference between those with the highest (Kathimerini) and lowest scores - which include the public broadcaster ERT.

DIFFERENT TYPES OF TRUST




BRAND TRUST SCORES (0-10)





6% (-)
(37th/37) pay for **ONLINE NEWS**



42%
(1st/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	60% (-2)	78%
2	YouTube	36% (+4)	79%
3	Facebook Messenger	22% (+5)	58%
4	Viber	14% (+4)	49%
5	Twitter	13% (-)	24%
6	Instagram	10% (+4)	33%

49%

SHARE NEWS
via social or email



32%

COMMENT ON NEWS
via social or website



HUNGARY

The Hungarian government reached a new level of control over the media last year through a series of acquisitions by supportive oligarchs, and by using the power of state advertising to starve critical outlets of funding. With trust in mainstream media low, many rely on digital and social media as a source of independent news.

In April 2018, Hungarian PM Viktor Orbán was re-elected to a third consecutive term in power with a two-thirds majority in parliament. In the immediate aftermath, the owner of the legacy daily *Magyar Nemzet*, Lajos Simicska (Orbán's former closest ally, turned enemy), announced the closure of the newspaper due to financial problems. This development means the further shrinking of pluralism in Hungarian media and the loss of yet another newspaper with a long history.⁷²

Leading up to the elections, the media became a political battleground in 2017 in three ways. First, leading oligarchs acquired numerous media outlets, to the extent that over 500 titles are now published by companies owned by businessmen close to the government, with the entire rural population served by regional papers in the hands of government allies.⁷³ Secondly, Prime Minister Orbán launched a campaign against the media, identifying critical journalists as the main enemy along with 'Brussels' and the 'Soros mafia'.⁷⁴ In addition to cutting off state advertising, this also involved smear campaigns against critical media, and the boycott of these publications by government and Fidesz officials. Thirdly, government-sponsored campaigns, including aggressive anti-migration and anti-Soros campaigns, which flooded the public sphere (streets were covered with billboards), dominated the Hungarian media in 2017. Media outlets, including the leading broadcasters, sections of the press, and some popular online news outlets, have also been accused of



spreading misinformation and excluding critical voices from reporting. We observe a struggle for agenda setting, with the government and the media outlets under its control pushing migration as the main issue in the electoral campaign, and critical media outlets trying to put government corruption on the public agenda.

With the majority of mainstream broadcast and print media outlets influenced by government agendas, digital media have become important as a space where freedom of expression is practised and critical information can be found. On the other hand, reliance on digital news, especially accessed through social media, intensifies the already high level of polarisation.

In terms of weekly reach in TV and print, by far the most frequently accessed source of news is RTL Klub (60%), with TV2 (37%) in second place. The most significant change from the previous year is the decline of the public service broadcaster, MTV: it fell from third to fifth place, with 23% of online Hungarian news consumers saying they accessed news on MTV in the last week compared with 35% last year. In terms of online news, Index.hu (40%) remains ahead of Origo.hu (38%), followed by 24.hu (34%). Both Hirado.hu (-8) (the online portal of the public service broadcaster) and ATV.hu (-4) have experienced a significant drop in percentage of Hungarians using the sites for news.

In polarised environments such as Hungary, we see that trust in overall news

STATISTICS

Population	9.8m
Internet penetration	81%

(29%) is low (35th out of 37 countries). In public discourse, politicians and public figures frequently accuse media outlets of spreading 'fake news' and having a political agenda, which arguably adds to the sense of general lack of trust. Hungary also suffers from low trust in institutions in general while there tends to be a strong reliance on personal, informal networks. This helps to explain the high usage of social media in Hungary, though it is worth noting, if slightly surprising, that only 27% trust the news accessed this way.

In government-dominated small media markets such as Hungary, funding independent journalism becomes a crucial and difficult issue. Some of the most significant investigative journalism is produced by small NGOs, journalism centres, and digital-only outlets (Atlatzso, Direkt36). In addition to limited distribution, they struggle financially which is not surprising when we see that a very small portion of Hungarian news consumers pay for online news (8%) and a third (32%) use an ad-blocker (6th highest out of 37 countries).

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Central European University

⁷² <https://www.ft.com/content/8f78f132-3cc6-11e8-b9f9-de94fa33a81e>

⁷³ <https://adatujsgiras.atlatzso.hu/2018/01/11/fedezze-fel-a-kormanykozeli-mediabirodalmat/>

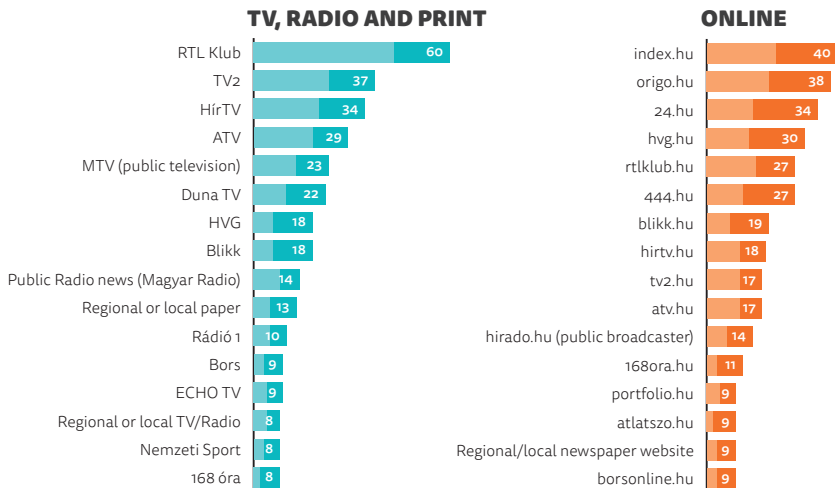
⁷⁴ <https://atlatzso.hu/2017/11/22/kilenc-grafikon-a-kormanymedia-tulsulyarol-igy-ervenyesul-a-sokszinu-tajekoztatasi-elve-magyarorszagon/>
<http://nepszava.hu/cikk/1136338-a-fidesz-oligarchaihoz-kerult-a-teljes-videki-sajto>

⁷⁴ <https://24.hu/kozelet/2017/07/25/a-fidesz-most-olyan-ellenfelet-valasztott-amelyik-valaszolni-is-tud>

TOP BRANDS

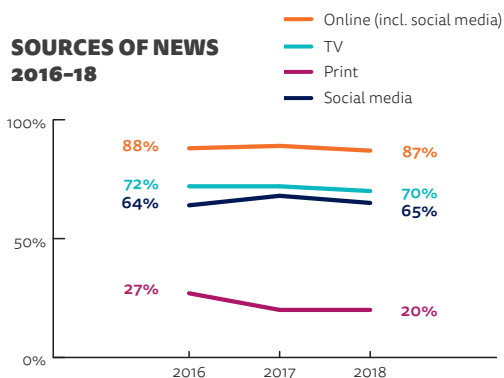
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

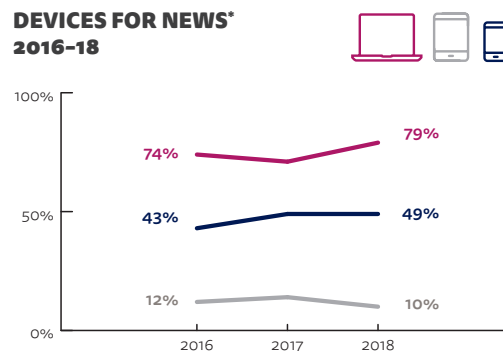


CHANGING MEDIA

Online news is the most common source for Hungarians (87%), though the online nature of the poll will tend to underplay the importance of television (70%) and print (20%), especially amongst those in rural areas. Social media use for news (65%) is one of the highest in our survey.



DEVICES FOR NEWS* 2016-18



*2018 computer data may be overstated - see methodology for more information

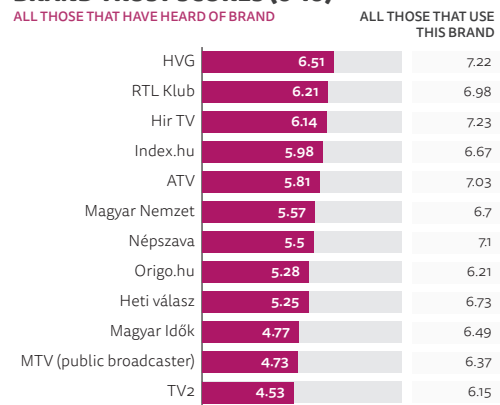
TRUST

Overall trust in the news (29%) is amongst the lowest in our survey while greater trust in brands people use themselves (52%) suggests high levels of media polarisation. Media outlets deemed least trustworthy include pro-government outlets MTV and TV2, as well as Origo.hu.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



8%
(30th/37) pay for **ONLINE NEWS**

32%
(6th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	60% (-4)	81%
2	YouTube	29% (+4)	75%
3	Facebook Messenger	11% (+2)	58%
4	Google Plus	6% (+1)	13%
5	Twitter	5% (-)	13%
6	Instagram	4% (+1)	20%

43%

SHARE NEWS
via social or email



24%

COMMENT ON NEWS
via social or website



IRELAND

Brexit and its fallout have dominated news coverage with the Irish media expressing strong opposition to Brexit. Concern about the influence of 'fake news' has continued, and moves to clarify internet users' rights over their data are expected.

Irish media were largely in a state of consolidation in 2017. In recent years, the Irish broadcasting market has undergone a number of changes, and some of these issues are still being worked through. Losses continued at the public sector broadcaster RTE, where director general Dee Forbes has said the broadcaster again expects to make a loss in the current year and described the organisation's successive deficits as 'unsustainable'. As elsewhere, a lack of gender equality in the media industry generated significant comment and controversy, with calls for more proactive measures to increase gender balance in broadcasting. RTE TV news maintains its dominant position as the most consumed offline news brand in Ireland, while digital-born site thejournal.ie continues to stay just ahead of RTE Online.

TV3, the second-biggest Irish TV network, which was bought by Virgin Media for €80m in July 2015, had been in the final stages of preparing a rebrand of its three channels to reflect the name of its parent company. This was put on hold in early 2018 with the company saying it had other priorities. The channel is claiming a 23% increase in viewership,⁷⁵ buoyed by sports rights and entertainment formats.

There were no closures in the newspaper sector and indeed the UK-based *The Times (Ireland)* launched a daily print edition. The *Irish Times* agreed a deal to acquire all the publishing and media interests of Landmark Media Group, the Cork-based company that owns the *Irish Examiner*, the daily *Evening Echo*, and seven regional titles.

A deal for Independent News and Media (INM), which publishes several national



and local titles, to buy regional group Celtic Media fell through in June 2017. It had been opposed by the journalist union (NUJ) on the grounds that it would weaken media diversity. Ireland fell from 9th to 14th place in the annual Press Freedom Index compiled by Reporters Without Borders; the non-profit cited concentration of media ownership as a major threat to press freedom in Ireland.

There were also substantial changes to the boardroom at INM with the departure of both the chairman and chief executive. The former Telegraph Media Group executive, Murdoch MacLennan, became chairman in March 2018. In addition, the Office for the Director of Corporate Enforcement is seeking to appoint a High Court inspector following whistleblowing at the company from the former chief executive. The Data Protection Commissioner is also considering an investigation into allegations that a data breach at the company had allowed outside companies to have access to confidential information about some journalists.

All print titles suffered declines in circulation. The *Irish Times* combined print and digital sales were down 2% year-on-year, though the audited digital edition was up 29%, as more people switched from print to digital. The *Irish Independent* had a combined print and digital edition circulation of 92,903, down 6% year-on-year. The *Irish Examiner* had a print circulation of 27,589 in the second half of 2017, down 8%. *The Times*, which launched an Ireland edition in print form in June, recorded an average monthly circulation of

STATISTICS

Population	4.7m
Internet penetration	94%

10,111 from July to December. The *Irish Daily Mail* suffered the largest decline among the larger papers – over 11%.

More broadly, the central debates about digital media in Ireland concern the circulation of 'fake news', particularly in relation to the UK's Brexit referendum, the US presidential election, and some concerns about the impact on the May 2018 referendum on abortion.

The Irish Data Protection Commissioner is to issue guidance to users in terms of how they can trace why they are receiving particular advertisements and stories on social media, how they can mute or turn off receiving ads from those sources, and how they can amend their preferences to control the types of ads they are served. Meanwhile the High Court in Ireland has decided to make a reference for a preliminary ruling to the Court of Justice of the European Union in proceedings between the Data Protection Commissioner, Facebook Ireland Limited, and data privacy activist Maximilian Schrems, concerning the validity of allowing Facebook to transfer personal data from the EU to the US.

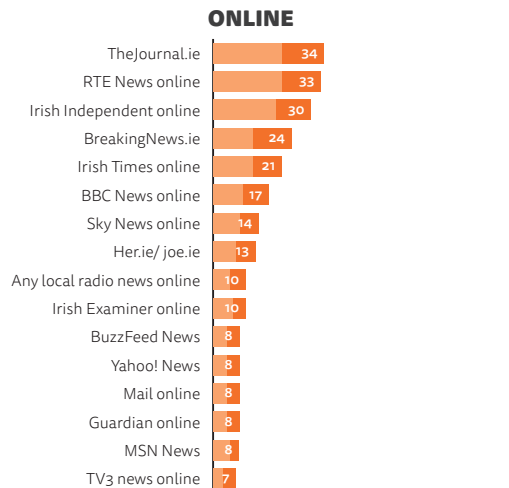
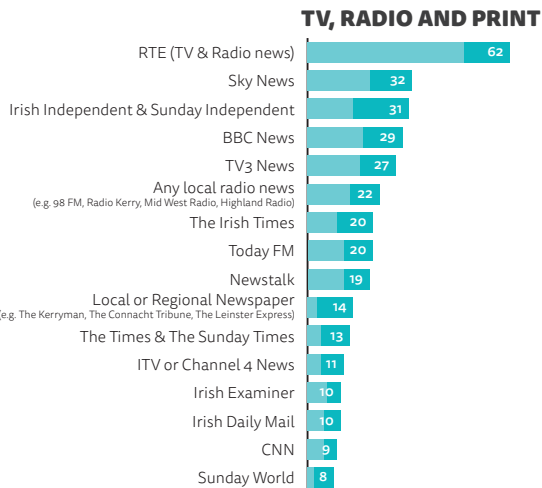
Jane Suiter
Dublin City University

⁷⁵ <https://www.irishtimes.com/business/media-and-marketing/tv3-halts-move-to-rebrand-channels-1.3420305>

TOP BRANDS

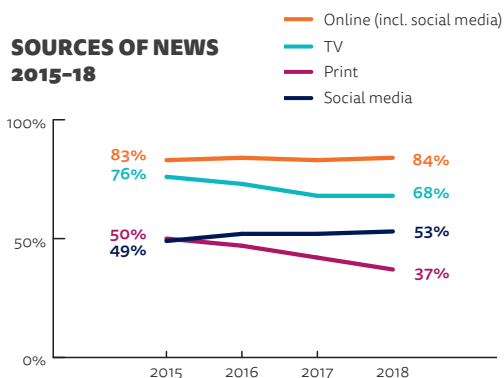
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

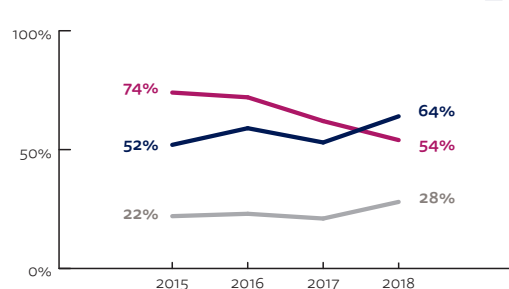


CHANGING MEDIA

The smartphone has overtaken the computer/laptop in terms of news access for the first time. Reach for both television news and print has fallen steadily in the last few years, with the percentage reading newspapers and news magazines in the past week now at just 37%.



DEVICES FOR NEWS 2015-18



TRUST

Trust in media in general has now returned to 'normal' levels following a dip last year possibly related to a 'fake news' debate that featured heavily during and after the US presidential election. Trust in search and social media is close to the European average.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
BBC News	7.39	7.72
RTE News	7.39	7.77
Irish Times	7.35	7.76
Irish Independent	7.03	7.44
TV3 News	6.94	7.71
Irish Examiner	6.94	7.76
Sky News	6.91	7.39
Today FM	6.84	7.35
Newstalk	6.84	7.44
Breakingnews.ie	6.4	7.05
Journal.ie	6.36	6.88
Irish Daily Mail	5.58	6.46
HuffPost	5.57	6.51
her.ie/joe.ie	5.47	5.6
Yahoo! News	5.45	6.6

11% (+2)
(20th/37) pay for **ONLINE NEWS**

27% (-2)
(18th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	38% (-3)	67%
2	YouTube	18% (-)	60%
3	WhatsApp	13% (+2)	52%
4	Twitter	11% (-)	25%
5	Facebook Messenger	9% (+2)	44%
6	Snapchat	6% (+2)	19%

35%
SHARE NEWS
via social or email

20%
COMMENT ON NEWS
via social or website

ITALY

This year has been marked by a bitter national election campaign, discussions about 'fake news', and continuing disruption in the media landscape.

Few expected the March 2018 Italian elections to lead to a decisive political outcome and the campaign was marked by fears about the rise of populism and potential political conflict. Immigration became a major topic for discussion moving up the agenda in February with the shooting of six people of African origin in the city of Macerata by a far-right extremist. Other episodes of political violence contributed to the harsh climate in which the campaign took place.

Pre-existing anti-establishment and anti-immigration sentiments have also been fuelled by the spread of misinformation. False information was used, for example, to misrepresent immigrants' involvement in major and minor crimes and to accuse Italian politicians of nepotism. A journalistic investigation by BuzzFeed on a network of Italian websites and social media pages that spread nationalistic rhetoric, anti-migrant content, and misinformation resulted in Facebook shutting down several of these pages.⁷⁶ In 2017, the President of the Italian Parliament organised official initiatives to fight misinformation, while the Government launched an online service to allow citizens to report 'fake news' to the Italian postal police. The latter initiative has triggered discussions on who should decide what information is true or false.⁷⁷

While revenues in the broadcasting sector started to rise again after some years of decline, in September 2017 newspaper sales showed a 11% reduction year-on-year.⁷⁸ After a series of further consolidation moves, two publishing groups share the leadership of the newspaper market: GEDI, which publishes *La Repubblica* and *La Stampa*, in addition to several local



newspapers and radio stations; and RCS Mediagroup, which publishes *Il Corriere della Sera*, *La Gazzetta dello Sport*, and other local newspapers in Italy, in addition to *El Mundo* and *Marca* in Spain. After years of competition in the pay-TV market, in March 2018 Berlusconi's Mediaset and Murdoch's Sky Italia reached an agreement that includes the joint distribution of entertainment content on their pay-per-view platforms and free-to-air TV channels.

The online news market is still dominated by legacy players, but this year some digital-born outlets have started to make more impact. The top news brands in terms of online reach are those of the main newspapers (*La Repubblica*, *Il Corriere della Sera*, and *Il Fatto Quotidiano*) and the main TV broadcasters (the Mediaset's TgCom24.it, SkyTg24, and the public broadcaster's RaiNews.it). The website of the main Italian news agency, ANSA, has grown and reached the third position in the Italian ranking. This is an unusual example of news agency developing a direct consumer offer and attracting substantial online reach.

RAI's online news service has also improved its position, but is still far from matching the high levels of reach it achieves on television. Internal disagreements on the plan to reform the public broadcaster's news services have led to the resignations of RAI's top managers and are still slowing down the expected launch of a new news website.

STATISTICS

Population	60m
Internet penetration	87%

Impressive results have also been accomplished by newspapers focusing on local news, such as *Il Messaggero* (7%) and *Quotidiano.net* (7%). The most relevant change in the Italian online ranking is the growth of the digital-born outlet *Fanpage* (11%). In addition to its effective use of social media for distributing both hard and soft news content, *Fanpage* gained attention in February for its investigative reporting on the waste-dumping business, which led Italian authorities to investigate several local politicians and businessmen.⁷⁹

This year, the trend towards pay models for online news from Italian newspapers has advanced further. In early 2016, *Il Corriere della Sera* was the first, among the main Italian general-interest newspapers, to launch a metered paywall. In late 2017, *La Repubblica* adopted a freemium model. Now many relevant Italian newspapers, including *Il Fatto Quotidiano*, *La Stampa*, and *Il Messaggero*, are adopting some form of pay models for their online news. Despite the moves by publishers, our data show the proportion of people paying for online news remains static at 12%.

Alessio Cornia

Research Fellow, Reuters Institute for the Study of Journalism

⁷⁶ https://www.buzzfeed.com/albertonardelli/one-of-the-biggest-alternative-media-networks-in-italy-is?utm_term=.vak4X6JGgo#suwwBzy9Zk; <https://www.nytimes.com/2017/11/24/world/europe/italy-election-fake-news.html>

⁷⁷ <http://www.primaonline.it/2017/06/27/258736/al-via-lindagine-conoscitiva-della-commissione-internet-sulle-fake-news>; <http://www.lastampa.it/2017/04/20/tecnologia/news/venerd-alla-camera-il-tavolo-di-lavoro-sulle-fake-news-voluto-dalla-boldrini-7bntcWmsDGguB8LLV1vTK/pagina.html>; <https://www.theguardian.com/world/2018/jan/19/italians-asked-report-fake-news-police-run-up-election>

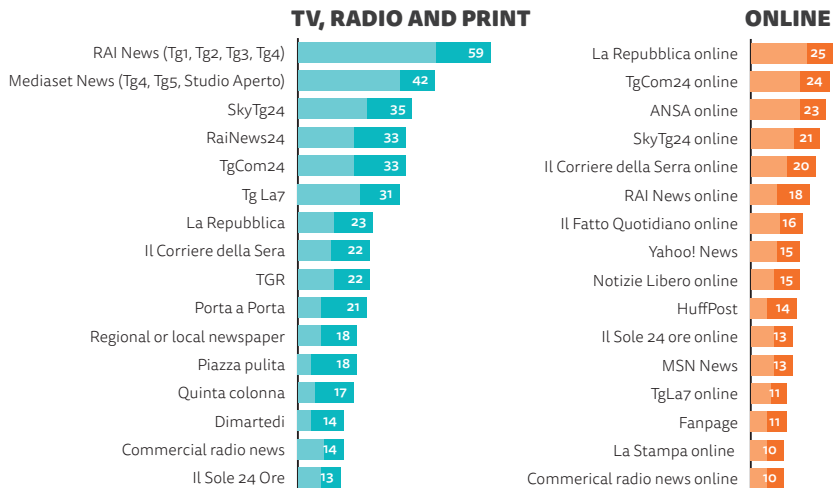
⁷⁸ <https://www.agcom.it/osservatorio-sulle-comunicazioni>

⁷⁹ <https://www.fanpage.it/bloody-money-how-fanpage-infiltrated-a-former-mafia-boss-into-waste-traffic-with-a-camera>; http://www.ansa.it/english/news/politics/2018/02/16/campania-governor-de-lucas-son-probed-4_e7998b64-1a69-4534-9234-d9f7d8c4603e.html

TOP BRANDS

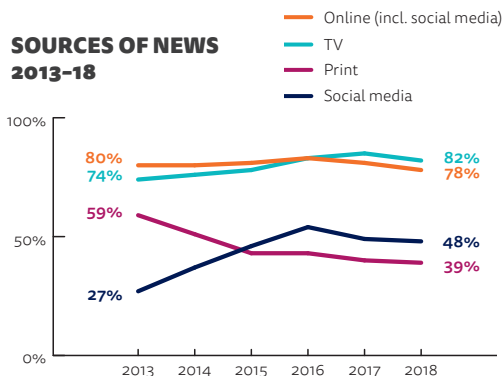
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

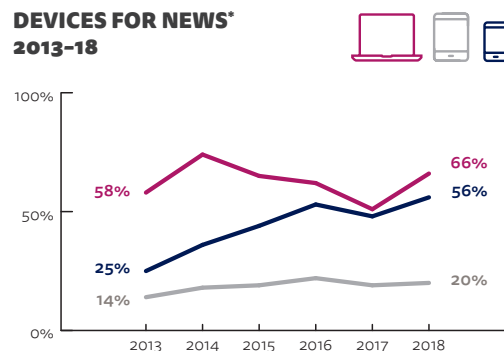


CHANGING MEDIA

Newspaper readership continues to fall steadily while television news viewership has been more stable than in many other countries. Smartphones continue to be more important with over half of our sample (56%) using them for news each week.



DEVICES FOR NEWS* 2013-18

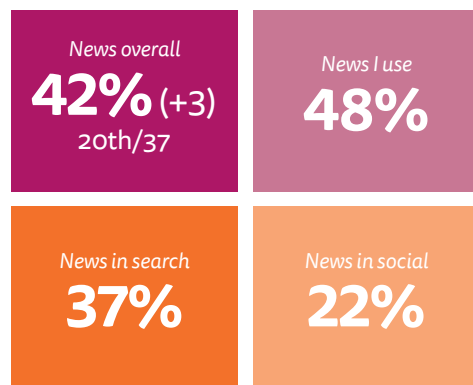


* 2018 computer data may be overstated - see methodology for more information

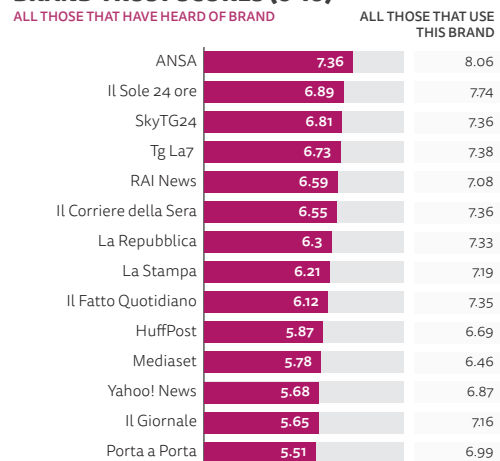
TRUST

Concerns over 'fake news' may help explain relatively low trust - a long-standing trend partly attributable to the partisan nature of many Italian news outlets. Brands that are most trusted are generally those that are known for lower levels of politicisation.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



12% (-)
(17th/37) pay for **ONLINE NEWS**

25% (+5)
(24th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	51% (-)	75%
2	WhatsApp	25% (+1)	73%
3	YouTube	25% (+3)	69%
4	Twitter	10% (-)	24%
5	Facebook Messenger	8% (+2)	36%
6	Instagram	7% (+1)	32%

41%

SHARE NEWS
via social or email



27%

COMMENT ON NEWS
via social or website



NETHERLANDS

STATISTICS

Population	17m
Internet penetration	95%

The Netherlands are characterised by relatively high levels of trust in news and little concern about 'fake news'. High trust figures might be due to a media landscape in which strong public service media set the quality standard for commercial news brands.

In terms of news industry developments, Flemish newspaper publishing and broadcast media company Mediahuis won a takeover battle with John de Mol (Talpa) over TMG (Telegraaf Media Groep), one of the country's largest media companies that includes the most popular Dutch newspaper *De Telegraaf*. De Mol in turn bought the Netherlands' largest news agency ANP. Former weekly, now monthly magazine *Vrij Nederland* launched a new online subscription model under the motto 'Read less, read better', delivering one story (in article, video, or podcast form) per day via WhatsApp or email (€6.99 per month). In terms of paying for news, print circulation (-5%) continued to decline in 2017, but digital circulation increased by almost 20%.⁸⁰

The most remarkable change in our data this year is the large increase in trust in news media of 8 percentage points, compared to an average of +1% across all countries. The Netherlands (59%) now rank third in terms of trust in media, behind only Finland (62%) and Portugal (62%). Public news organisation NOS Nieuws, whose 8pm bulletin continues to attract around 2m viewers every night, is the most trusted news brand. Perhaps surprisingly, its commercial counterpart RTL Nieuws ranks second for trust. This aligns with our (2017) observation that television is a key driver of trust, due in part to news consumers' idea that 'seeing is believing'.⁸¹ Following closely are commercial digital-born player Nu.nl and the major Dutch quality newspapers. The relatively high trust in commercial news organisations might be explained by Stephen Cushion's (2012)⁸² argument that if public news media set the quality



standard, commercial news organisations have to follow if they want their news to be consumed. Quality newspapers, TV news, and radio news in the Netherlands score high on trust, in particular among their users. After NOS Nieuws, newspapers *NRC* and *Het Financieele Dagblad* are most trusted by their own users. Another interesting difference between Nu.nl and the other commercial news organisations mentioned is that actual use (rather than awareness or brand reputation) of the latter results in a larger increase in trust.

Membership-based online news platform *De Correspondent*, which now has 60,000 paying members, hopes to launch an international counterpart (*The Correspondent*) in 2018. The platform is also building a 'rolodex' to be able to tap into its members' expertise more systematically. The position of Conversation Editor was created to help mediate between members and correspondents, and to make their comment section more diverse by inviting under-represented groups (e.g. refugees) to share their experiences. Pay-per-article platform *Blendle* saw several news organisations pull out (*NRC*) or limit their services (*De Telegraaf*, *De Persgroep*). *De Persgroep* launched a similar initiative, *Topics*, reaching 475,000 people in its first month.⁸³ *Blendle* continues to be loss-making and dependent on capital injections to stay afloat, but its founder and CEO expects little difficulty securing additional investors.⁸⁴

In line with the high trust figures, the Netherlands score lowest in concern

about online 'fake news': 30% compared to an average of 54%. Discussions about 'fake news' seem to centre less around news produced by professional news organisations, instead focusing on social media, foreign actors (e.g. Russia), and politicians. For instance, new US Ambassador to the Netherlands, Pete Hoekstra, caused controversy over his claims (caught on tape) regarding the existence of 'no-go zones' and politicians being burned in the Netherlands. Before eventually apologising, he initially dismissed reports of his claims as 'fake news'. Although Dutch news organisations themselves face little concern about 'fake news', they do take the phenomenon seriously. On 5 March 2018, public news organisation NOS broadcast the 86-minute live event 'News or Nonsense'.⁸⁵

In an effort to tackle 'fake news', Facebook started a collaboration with Nu.nl and *Nieuwscheckers*, a fact-checking initiative from Leiden University. In November 2017, they were recognised as fact-checking organisations by the International Fact Checking Network (IFCN). In February 2018, several Dutch news organisations and an individual journalist filed summary proceedings against the European Commission regarding accusations of 'fake news' by EU 'fake news' watchdog EU vs. Disinfo. The lawsuit was dropped after the latter withdrew its accusations.

Irene Costera Meijer and Tim Groot Kormelink
Vrije Universiteit Amsterdam

⁸⁰ <https://www.svdj.nl/de-stand-van-de-nieuwsmedia/papier/oplage-telegraaf-ad-klappen/>; <https://www.svdj.nl/de-stand-van-de-nieuwsmedia/digitale-oplage-kranten-stijgen>

⁸¹ Nic Newman and Richard Fletcher, *Bias, Bullshit and Lies: Audience Perspectives on Low Trust in the Media*. Oxford: RISJ, 2017.

⁸² Stephen Cushion, *The Democratic Value of News: Why Public Service Media Matter*. New York: Palgrave Macmillan, 2012.

⁸³ <http://www.gfk.com/nl/insights/press-release/gfk-dam-mei-2017-stormachtige-start-topics>

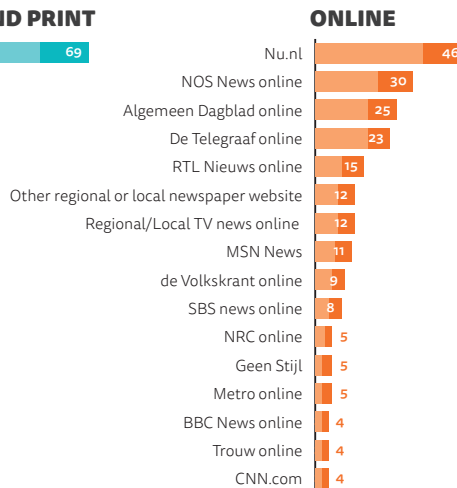
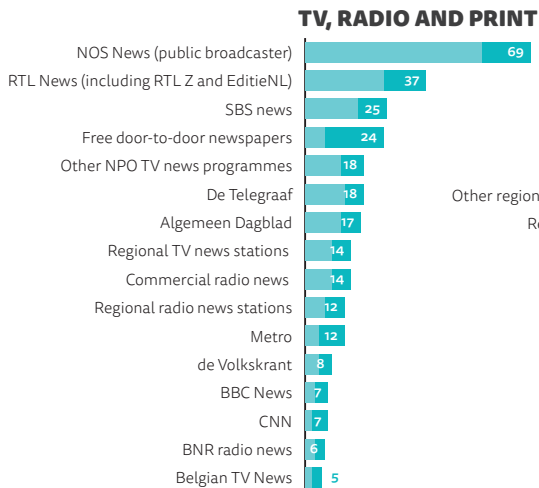
⁸⁴ <http://www.quotenet.nl/Nieuws/Verlies-Blendle-toegenomen-voortbestaan-onzeker-zonder-nieuwe-investering-in-2018-208712>

⁸⁵ https://www.npo.nl/nieuws-of-nonsense/05-03-2018/POW_03787753?

TOP BRANDS

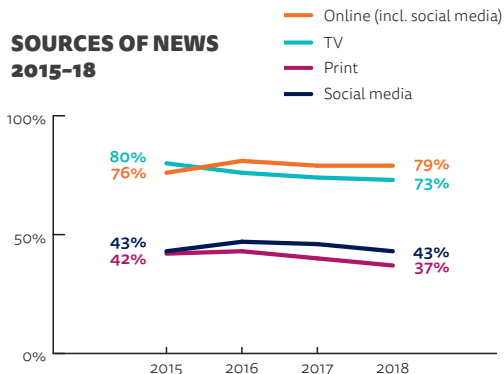
% Weekly usage

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TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

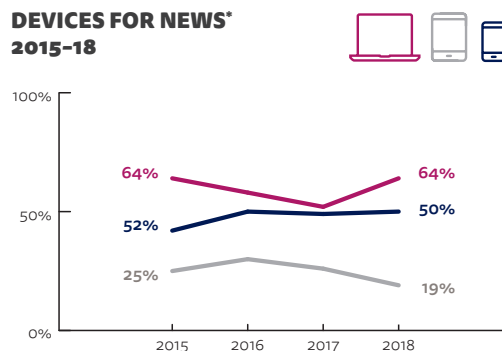


CHANGING MEDIA

Online and television remain the two most important news sources in the Netherlands, though TV news has fallen 7 percentage points in four years. Social media news use has been in gentle decline since 2016.



DEVICES FOR NEWS* 2015-18

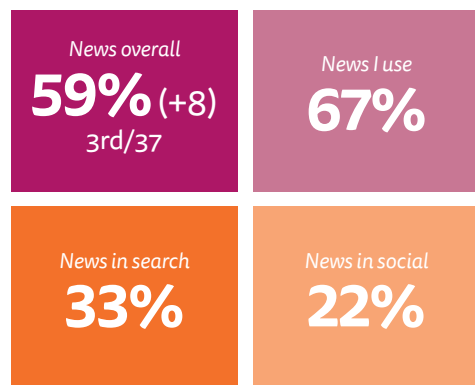


* 2018 computer data may be overstated - see methodology for more information

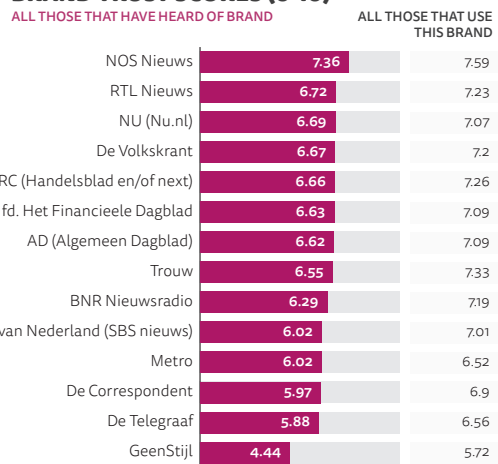
TRUST

Trust in news shows a remarkable increase of 8 percentage points. Although 'fake news' is a hot topic, discussions centre more around social media, foreign actors, and politicians than around news produced by professional news organisations.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



PAY

13% (-1)
(16th/37) pay for **ONLINE NEWS**

AD-BLOCKER

26% (+4)
(20th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	29% (-3)	65%
2	WhatsApp	17% (+2)	69%
3	YouTube	14% (-)	54%
4	Twitter	7% (-1)	17%
5	Instagram	5% (+1)	24%
6	LinkedIn	5% (+2)	22%

22%
SHARE NEWS
via social or email

12%
COMMENT ON NEWS
via social or website

NORWAY

The Norwegian media landscape mixes strong national publishers and public service media, with a reputation for innovation in content and business models. Norwegians' main news sources include public broadcaster NRK, commercial channel TV2, leading quality newspaper *Aftenposten*, and tabloids *VG* and *Dagbladet*. However, local and regional newspapers remain important for many Norwegians – in print and online.

Traditional news sources like print and television are in decline, while online news use remains unchanged from last year. Almost nine in ten (87%) Norwegians use online news weekly, one of the highest figures in our survey, with user patterns shifting rapidly from computers to smartphones. Smartphone is now the number one device for news in Norway. This gradual shift away from the computer has happened over the last two years, and while the use of computer now seems to have peaked, smartphone is still on the rise.

Norway remains the country with the highest number of consumers willing to pay for online news, up 4 percentage points since last year. The strong tradition for print newspaper reading, coupled with the absence of freesheets, has facilitated a transition to digital subscriptions through hybrid solutions (typically bundles offering access to both paper and digital content).

Despite broadcast TV's decline, it remains a source for the majority in Norway. This year, commercial channel TV2 overtook licence fee-funded NRK as the most used. TV2 was established in 1992 with a public service remit, but is an ad-funded, private alternative to the NRK. 2018 will see negotiations for a renewed contract to prolong its public service



remit. Simultaneously, the government is preparing discussions to consolidate all media support schemes (including press support and licence fee money) in one shared pool for redistribution across media and platforms. This coincides with scrutiny of NRK's online presence, and might signal changes in the regulation of the public broadcaster.

Social media are used as a source of news by many. While the use of most of the platforms remains almost unchanged this year, Snapchat sees a significant increase (4 points). This can be seen in the context of Snapchat's 2017 launch of one of the first non-English-speaking Discover news channels in Norway (VG). Meanwhile, Buzzit, the viral news site launched by local newspaper company Nordlys in 2014, closed in autumn 2017, leaving no major viral sites left in Norway. By 2018, some media companies, including local newspaper owner Amedia (owned by a foundation since 2016) reported considerable profits due to increased ad sales and more digital subscribers, coupled with cost-cutting.

Faktisk.no, a non-commercial initiative checking the accuracy of news online, was launched as a tool to combat so-called 'fake news'. The launch happened in the period leading up to Norway's general election in the fall of 2017, amidst worries over 'fake news' similar to that seen in the US election. The election was expected to be greatly influenced by social media,

STATISTICS

Population	5.5m
Internet penetration	99%

thus a big proportion of the political campaign budget was spent on social media advertising. Politics and social media have become increasingly interlinked in Norway. In March 2018, a controversial status update from the Minister of Justice on Facebook caused her resignation and almost a change of government. By spring 2018, Facebook was also heavily debated in Norway for its facilitation of polarised debate and for privacy issues similar to those in the US.

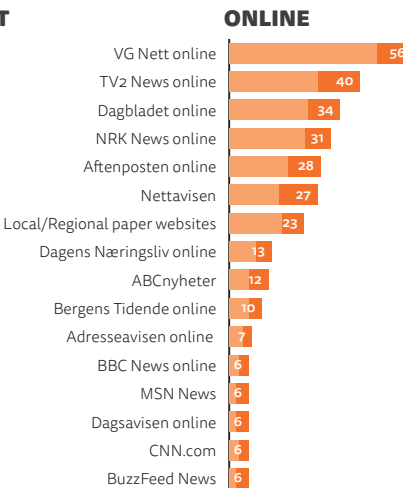
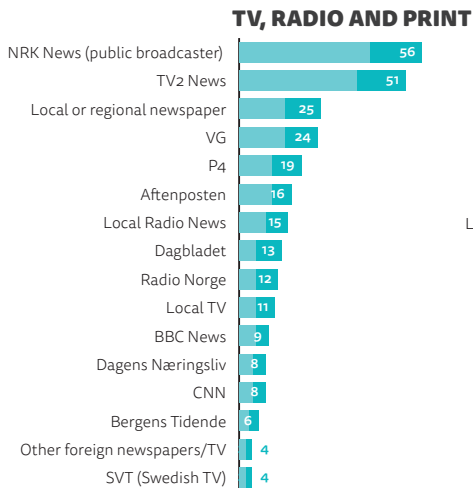
Like many other countries, Norway has also seen the rise of 'partisan' news sites in the last few years. *Resett.no*, *document.no*, and *rights.no*, are among the most used, all with a tough stance on the issue of immigration and Islam, and all causing public debates that extend beyond their audiences and into the general headlines. While these sites reach a significant number of people, they are less trusted than mainstream media, with the public broadcaster NRK topping the list in our survey.

Hallvard Moe and Hilde Sakariassen
University of Bergen

TOP BRANDS

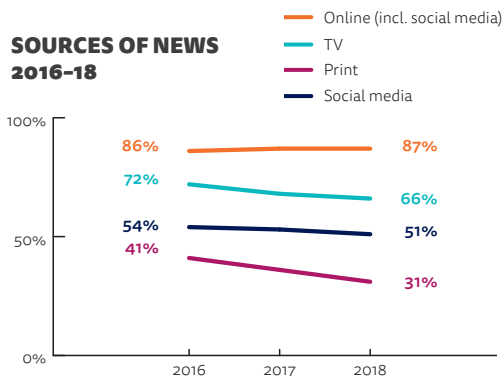
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

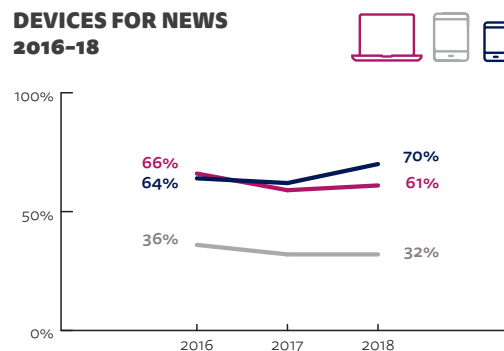


CHANGING MEDIA

Traditional media such as print and television news have shown significant decline over the last few years as digital habits become more entrenched. Smartphones have overtaken computers in terms of news usage reaching almost three-quarters (70%) of our sample each week.



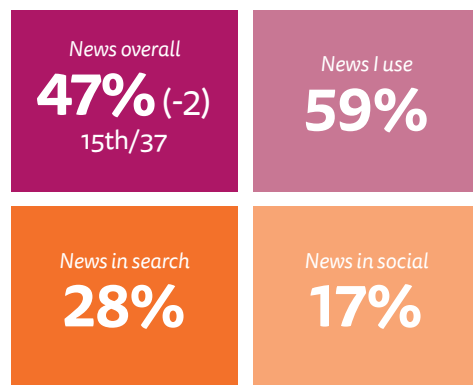
DEVICES FOR NEWS 2016-18



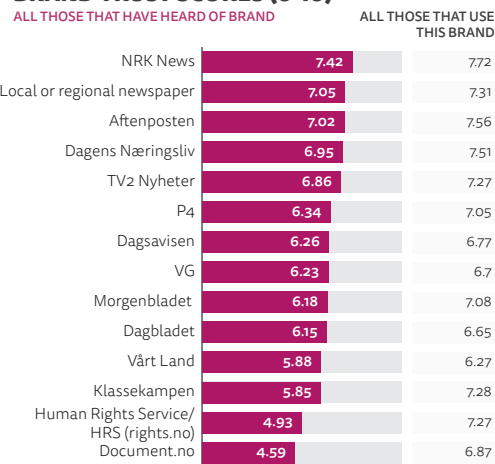
TRUST

Trust in news is relatively low despite little social and political polarisation in media use patterns, and financial support. Research shows that trust is linked to politics, with far-right voters and those with strong views on immigration expressing most mistrust.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



30% (+4)
(1st/37) pay for **ONLINE NEWS**

24% (+1)
(29th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	40% (-1)	78%
2	YouTube	12% (+2)	59%
3	Facebook Messenger	11% (+1)	59%
4	Snapchat	9% (+4)	47%
5	Twitter	6% (-)	18%
6	Instagram	6% (+2)	42%

27%

SHARE NEWS
via social or email



17%

COMMENT ON NEWS
via social or website



POLAND

Poland's media environment is characterised by highly competitive and often partisan broadcasters, large web portals, and a divided press. Meanwhile the ruling Law and Justice party has strengthened its control of public broadcasting and is now targeting private media.

When the media regulator slapped a \$415,000 fine on private broadcaster TVN in December 2017 for coverage of anti-government rallies, or 'propagating illegal behaviour' in the official language, many thought this heralded the end of media freedom in Poland.

But then the nationalist-populist government paused – partly as a result of US government intervention on behalf of TVN's new owners, Scripps Networks, and later Discovery. For the sake of relations with the US, and an ongoing multi-billion dollar weapon deal, the Polish government quietly cancelled the fine and froze work on a proposed media bill that threatened TVN's investors with limits on the share of foreign capital.

The government was frequently at loggerheads with journalists and publications critical of their record. When a reporter for the left-leaning *Gazeta Wyborcza* newspaper heard a new conspiracy theory about a 2010 president's plane crash, he exploded at a press briefing. Instead of asking questions, he shouted at a ruling party's leader: 'You are a liar and a criminal! And you'll stand up one day in the courts of free Poland!' Pro-government commentators argued that the journalist had crossed the line, mistaking a press conference for an opposition rally. The journalist himself explained that he couldn't bear any more lies. But the incident reveals the extent of partisanship in the Polish media along with the often-bitter and emotional tone of public debate. None of this is helping overall trust in the news among Polish consumers, which fell 5 percentage points to 48%.

All the three biggest TV networks have lost viewers, partly due to changing



consumption habits. According to the industry standard Nielsen ratings, the state broadcaster's main channel, TVP1, lost 15% in a year while the average viewership of its flagship news show *Wiadomosci*, widely criticised for spreading government propaganda, decreased 20%.⁸⁶ In response, the state broadcaster developed an alternative measurement system that placed TVP1 and *Wiadomosci* at the top. Meanwhile, lower ratings translated into lower ad revenues for TVP. The government injected an extra \$233m into the broadcaster, allowing a shopping spree on sports rights and new shows, including a soap opera on 14th-century Polish kings.

Alternative and partisan news outlets have grown in significance, as noted by our survey for the first time. Mariusz 'Max' Kolonko is a Polish journalist living in the US who has built an opinion-based online video channel that has similar levels of reach to more mainstream outlets such as *Niezalezna.pl* or *Natemat.pl*. The Karnowski brothers-owned *wPolityce.pl* became a launchpad for a conglomerate of pro-government outlets such as a news weekly *Sieci Prawdy* and an online and cable TV channel *wPolsce*, attracting millions of dollars of advertising from state-controlled companies.

Digital and political disruption of advertising led private media owners to search for new sources of revenue. *Agora*, which publishes *Gazeta Wyborcza*, admitted that its fastest growing business was tickets and snacks at its cinemas, and heralded a shift to restaurants. *Gazeta Wyborcza* reported 133,000 paid digital-only subscriptions at the end of 2017; more than the 119,000 copies it sold in print. *Wirtualna Polska* (WP), an internet portal that is

STATISTICS

Population	38m
Internet penetration	73%

second in our list of online news sources, revealed that it made half of its revenue on e-commerce, selling clothes, holidays, home decorations, and loans.

Legacy media have been losing their monopoly on quality journalism, as internet-only portals such as top-ranked Onet beefed up newsrooms in order to differentiate and claim premium ad prices. Onet published major scoops, one of which destroyed the reputation of a leader of the biggest opposition movement, and another revealed a spat between Poland and the US over a bill penalising claims of the Poles' assistance in the German Nazi-led killings of Jews during the Second World War.

Journalism start-ups popped up online and offline: *Pismo* and *Przekroj* are new ambitious literary magazines, *Outriders* and *VSquare* are focused on foreign and investigative news, respectively. Other notable launches included digital *NewsMavens*, a feminist take on European politics and society, and *Vogue* magazine, a new Polish fashionista bible in print.

Vogue's first cover, featuring two skinny models and a Stalinist sky-scraper in Warsaw, went viral, sparking a debate about everything from aesthetics to diets. In parallel to the #MeToo movement, some female journalists accused prominent names of the liberal media of bullying and sexual harassment, and a political editor of a national newspaper lost his job.

Grzegorz Piechota

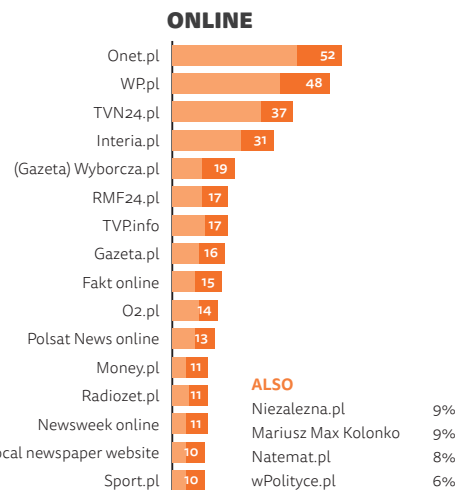
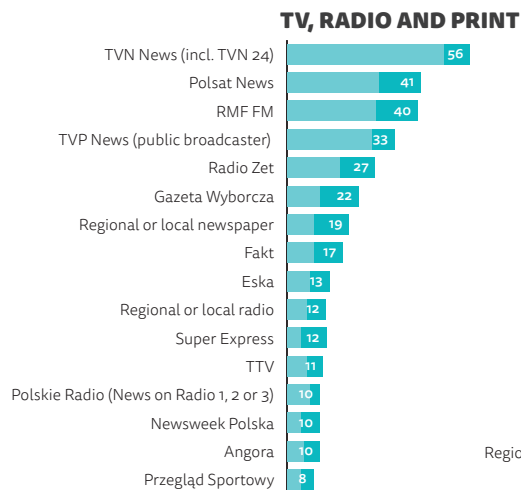
Google Digital News Visiting Senior Research Fellow, Reuters Institute for the Study of Journalism

⁸⁶ Average among viewers aged 4 and older. Data of National Broadcasting Council based on Nielsen Audience Measurement. Source: 'Information on the basic problems of radio and TV broadcasting in 2017'.

TOP BRANDS

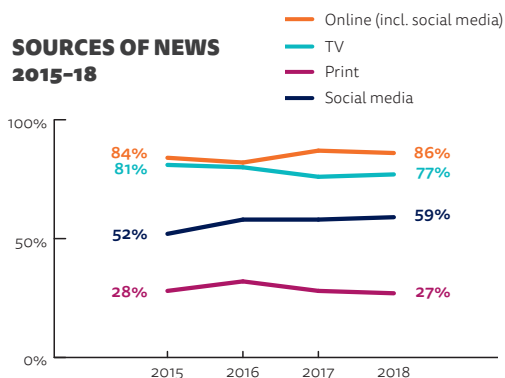
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

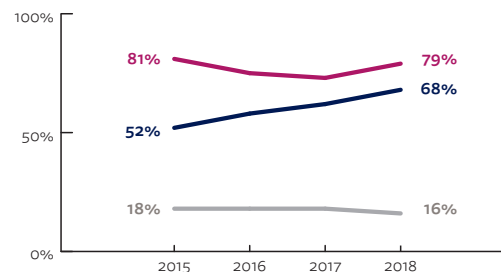


CHANGING MEDIA

Online news has opened up a gap of almost 10% over television news since 2015 amongst those who are connected to the internet with the smartphone, an increasingly important access point. Weekly print readership has declined less than in many other European countries.



DEVICES FOR NEWS* 2015-18

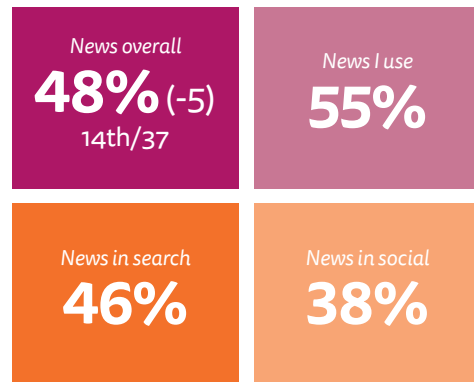


* 2018 computer data may be overstated - see methodology for more information

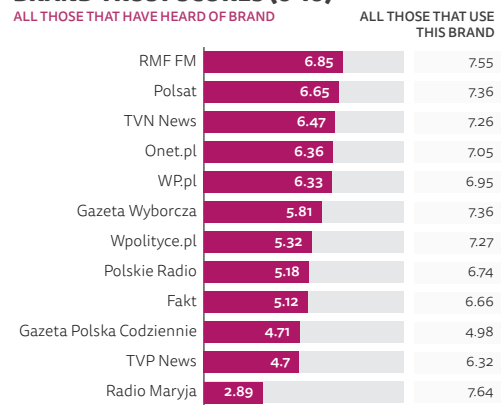
TRUST

Increasing polarisation may help explain falling overall trust. At a brand level, the State TV broadcaster (TVP) rates lower than tabloid newspaper Fakt. By contrast, RMF FM and Polsat, whose owners try to stay away from political conflict, have higher trust scores.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



PAY

16% (-)
(11th/37) pay for **ONLINE NEWS**

36% (+4)
(2nd/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	54% (+1)	73%
2	YouTube	37% (+5)	71%
3	Facebook Messenger	13% (+3)	44%
4	Twitter	8% (-1)	17%
5	Google+	6% (-1)	13%
6	WhatsApp	6% (+3)	19%

38%

SHARE NEWS
via social or email

27%

COMMENT ON NEWS
via social or website

PORTUGAL

Portugal is ranked (jointly) highest for trust in the news across our 37-country survey, but low confidence in social media and suspicions about the legitimacy of online news content raise concerns about how long this will last.

Online news in Portugal is almost as popular as television in terms of weekly reach, even if monetising that traffic remains a struggle. In that regard, one of the most significant digital initiatives of the past year has been the emergence of a new platform called Nónio, supported by six of the biggest media brands in Portugal.⁸⁷ The platform allows users to access hundreds of news websites, TV streams and radio on-demand services, with a single login. For publishers, this opens up the possibility of sharing data across multiple websites while offering consumers more convenience in terms of access. Publishers would like to win a greater share of the Portuguese digital advertising market, which is currently dominated by Facebook and YouTube (display) and Google (search). The Nónio platform was funded by a €900,000 grant from the Google Digital News Initiative, as part of its efforts to help publisher monetisation.

This year the Portuguese media landscape has been changed by the emergence of a new media group, called Trust in News, which now runs a portfolio of 12 magazines previously managed by the Impresa media group, that owns the SIC TV channels and respected weekly newspaper *Expresso*. One of the two main distribution companies, Distrinews, filed for bankruptcy, leaving the majority of the newspapers and magazines in the hand of a single distributor, VASP. This also contributed to the closing of Motorpress, a media group that owned specialist titles such as car magazine *Auto Hoje* and parenting publication *Pais & Filhos*. There were 65 job losses as a result, 22 of them journalists.



Meanwhile, telecom multinational Altice (the successor to Portugal Telecom) is in a complicated process, that raises competition issues, to buy Media Capital Group, the owner of the most watched TV channel TVI and Media Capital Radios. The Media Capital group is currently owned by the Spanish media Group PRISA.

Trust in news in Portugal has been consistently high. But this year's report puts the country in equal first place with 62% of the sample claiming they trust news in general. While this is consistent with previous studies, this year's data point to a more nuanced situation – 48% claim they trust news found through search engines but only 29% say they trust news on social media. Portuguese news consumers show high levels of concern about issues such as manipulation, 'fake news', and poor journalism. Almost half say they have seen examples of bad journalism in the previous week, and 38% say they have seen content which has been manipulated to suit a specific agenda.

Analysis of the data combining opinions on manipulation of news, 'fake news', poor coverage, bad journalism, and trust in media brands seems to show that the Portuguese distrust the news environment but tend to trust specific media brands. What could be thought as a rather ambiguous relationship between journalism and consumers can be explained by the traditional mismatch between opinion and practice of citizens: they express concern about the quality of journalism but stay faithful to their preferred journalist and brands in terms of trust.

STATISTICS

Population	10m
Internet penetration	72%

Looking at the most used sources for news, TV brands comprise the top five offline brands used for news – SIC Notícias, SIC, TVI24, TVI, and public service broadcaster RTP. In terms of online media outlets, the two brands listed at the top are digital-born SAPO, a portal which aggregates news from multiple outlets, and Notícias ao Minuto, followed by legacy newspapers that are also on the internet, *Jornal de Notícias*, *Público*, and *Correio da Manhã*.

Regarding payment for news, the survey casts a grim shadow over the print sector. The percentage of users who paid for a print newspaper in the previous week is 31% (down 6 points). Less than one in ten (9%) have paid for any kind of digital news in the past year, one of the lowest figures in our survey. Combined with increasing ad-blocker usage (up 3 percentage points from last year) the current trends are putting a huge strain on legacy print brands' revenue.

Ana Pinto Martinho, Gustavo Cardoso and Miguel Paisana

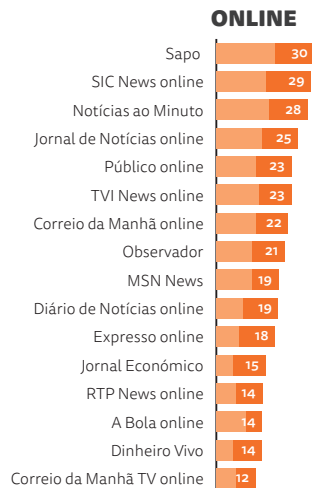
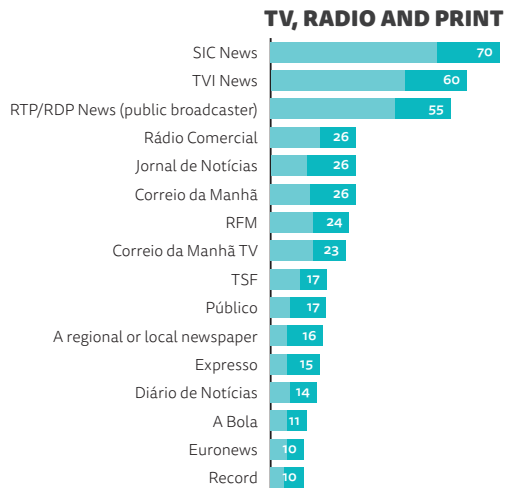
ISCTE University Institute of Lisbon

⁸⁷ <https://jpn.up.pt/2017/03/10/nonio-media-portugueses-vaio-passar-pedir-login>

TOP BRANDS

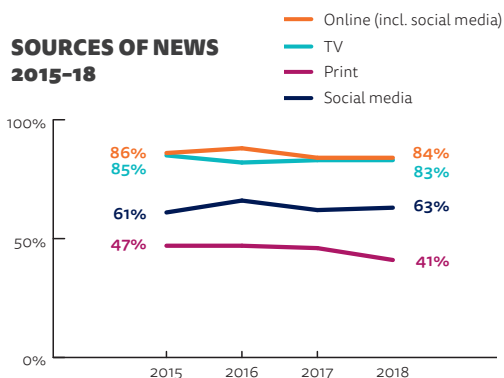
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

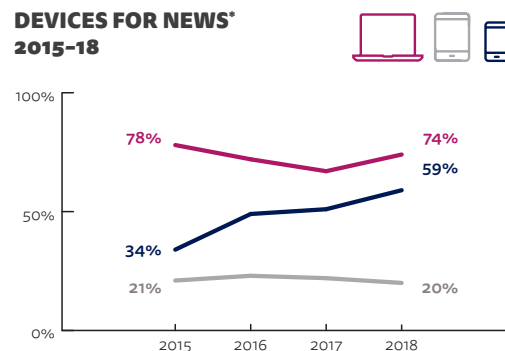


CHANGING MEDIA

There have been few underlying changes in the media landscape in Portugal, with TV and online news the most popular way of accessing news. Printed media continued to decline in terms of weekly reach.



DEVICES FOR NEWS* 2015-18

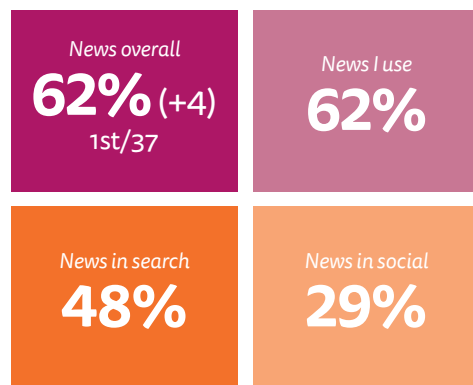


* 2018 computer data may be overstated - see methodology for more information

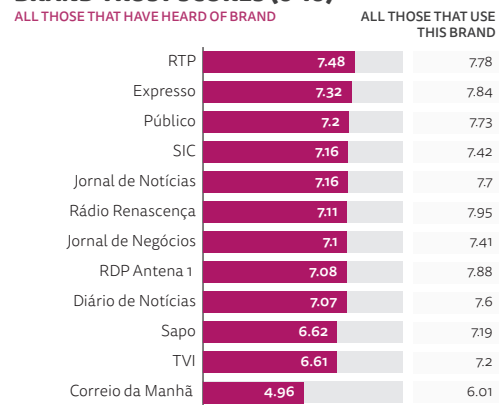
TRUST

High trust figures (62%) have been a subject of some surprise given the pressures on the publishers and concern about undue political and economic influence. Lower trust in search (48%) and social (29%) indicate concern over the reliability of news in third-party environments.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



9% (-)
(27th/37) pay for **ONLINE NEWS**

31% (+3)
(9th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	53% (-1)	75%
2	YouTube	22% (+2)	69%
3	Facebook Messenger	19% (+3)	62%
4	WhatsApp	11% (+5)	40%
5	LinkedIn	7% (+2)	25%
6	Instagram	6% (+2)	34%

49%

SHARE NEWS
via social or email



30%

COMMENT ON NEWS
via social or website



ROMANIA

A troubled political environment has generated high levels of debate online and sustained public interest in the news. But strong polarisation in newsrooms has led to continued scepticism, frustration, and low trust in the media from audiences.

While 2016 had been characterised by little or no coverage of an almost non-existent electoral debate,⁸⁸ 2017 saw a radical shift in politics and a 180-degree turn in media coverage. The first PSD-ALDE⁸⁹ coalition government, which proposed some decriminalisation of corruption in public offices, an apparent attempt to save political leaders from criminal charges, caught the attention of the media.⁹⁰ The public response was huge, with national street demonstrations in support of democracy and the rule of law.

After this, newsrooms managed to stimulate and sustain widespread public discussion about the proposed laws, and also about the judiciary, the economy, poverty, and public investment. The coalition government changed prime minister three times between January 2017 and January 2018, which further encouraged the appetite for public debate. Polarisation of newsrooms increased further, as did the public's demands, via social media, for accountability. The focus was not only on what journalists covered, but also how they did it.

Affordable mobile internet is increasingly used in Romanian households, and two-thirds (66%) are now consuming news on smartphones, a 10 percentage point increase on last year. According to Media Initiative,⁹¹ mobile telecommunications services are now the biggest spending advertisers, next to medical brands. Internet access reached the status of a quasi-public utility, and is now more accessible than running water and sewerage.



The leader in the news market, on TV and online, is still ProTV, part of Central European Media Enterprises, a public company which is listed on the NASDAQ and the Prague Stock Exchange. Another public company, Digi Communications, is consolidating its position, with its TV news channel, Digi 24, its news radio, Digi FM (a new entry on the offline brands list), as well as its online presence. Antena 1 and Antena 3, part of a family media business, Intact Group, are following closely behind, while targeting a different sector of the audience.

Most TV channels have seen a decline in usage (between 2 and 5%), and CNN is no longer a brand in the top 20, indicating a change in consumption habits for TV news and talk shows. This is not however the case for entertainment or sports (this was the year that Simona Halep became the world's number one women's tennis player). Kanal D, the third largest Romanian TV station, in rating and market share,⁹² only ranks 11th in offline news.

Public television (TVR) is maintaining a historical low in terms of market share though it retains some historic trust. Its improved financial situation, which came thanks to an infusion of public money, after discussions of possible insolvency, did not help it improve its weekly reach (33%), which remains amongst the lowest for European public broadcasters.

STATISTICS

Population	19m
Internet penetration	63%

Most mainstream online news brands' figures rose slightly and so did news portals like Yahoo! News (28%) and Ziare.com (28%) a local aggregator that also produces its own content. This shows the appetite among the Romanian public for multiple sources of news, as well as the lack of loyalty to specific brands. The average consumer in our survey says they use almost six of the top ten sources each week, including TV, radio, local newspapers, and news sites.

Online and social media distribution has opened up new opportunities for small independent news organisations doing investigative or narrative journalism, but the same applies to partisan sites and even hate speech.

Independent journalistic initiatives like the Rise Project, investigative journalists working as part of the Panama and Paradise Papers, Recorder.ro, Decât o revistă, Teleleu, and reference mainstream newsrooms like ProTV, Digi24, and Hotnews.ro covered themes such as hidden corruption money, poverty, and administrative incompetence.

Social consumption of news is still dominated by Facebook and YouTube, though there is an increasing trend, as elsewhere, to use WhatsApp and Messenger for finding and sharing news.

Raluca Radu

University of Bucharest

⁸⁸ <https://ro.ejo-online.eu/economia-mass-media/campania-electoral-a-fost-caracterizata-de-neputinta-si-strategie>

⁸⁹ PSD = the Social Democrat Party; ALDE = the Alliance of Liberals and Democrats Party.

⁹⁰ <https://en.ejo.ch/media-politics/another-question-journalisms-role-in-romanian-protests>

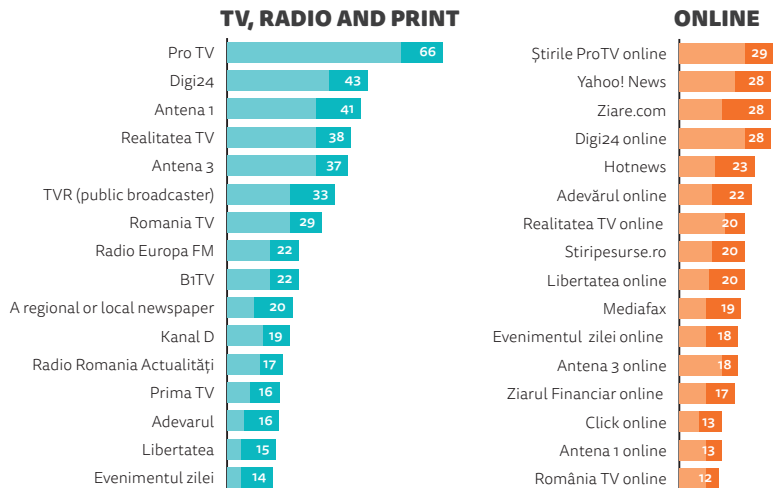
⁹¹ Initiative, *Media Factbook*, 2017: www.mediafactbook.ro (accessed Mar. 2018).

⁹² The Romanian Association for Audience Measurement, Feb. 2018: <http://arma.org.ro/en/audiences> (accessed Mar. 2018).

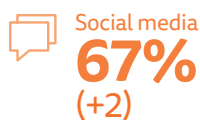
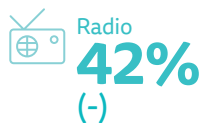
TOP BRANDS

% Weekly usage

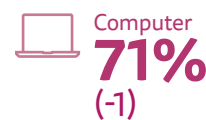
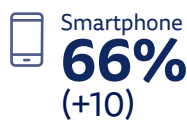
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



SOURCES OF NEWS



DEVICES FOR NEWS



TRUST

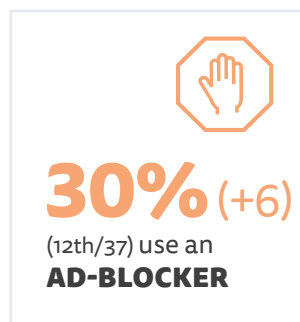
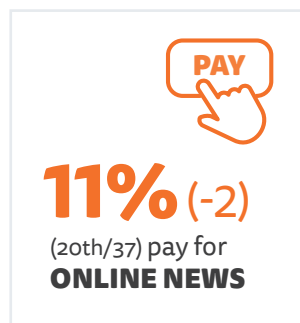
Intense discussions about politics, combined with polarisation of newsrooms has led to increased levels of scepticism. A financial daily, which has one of the only corrections and retractions page in Romania, enjoys one of the highest level of trust.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
Pro TV	7.23	7.62
Ziarul Financiar	7.11	8.02
TVR	6.97	7.71
Digi 24	6.94	7.85
Mediafax	6.94	7.63
Yahoo! Știri	6.66	7.46
Adevărul	6.37	7.4
Hotnews	6.32	7.34
Ziare.com	6.2	7.07
Realitatea TV	6.09	7.11
stiripesurse.ro	6.02	6.92
Antena 1	5.89	7.22
B1 TV	5.72	6.95
România TV	5.39	6.88
Antena 3	5.36	7.29



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	69% (-)	83%
2	YouTube	31% (+1)	75%
3	WhatsApp	18% (+4)	52%
4	Facebook Messenger	18% (+3)	52%
5	Google Plus	9% (-)	17%
6	Twitter	7% (-2)	17%



SLOVAKIA

Slovak journalism – already tested by questions about institutional independence and the growing popularity of websites publishing ‘fake news’ – was drawn into a political crisis following the murder of an investigative journalist. Meanwhile a Facebook experiment fuelled debates about the power of dominant social media platforms to influence news consumption in unpredictable ways.

In March 2018 Slovakia was shaken by the murder of journalist Ján Kuciak and his fiancée, an event that triggered a series of mass demonstrations and forced the resignation of the Prime Minister and Interior Minister – symbols of the institutionalised corruption that Kuciak was investigating. Kuciak worked for the news portal *aktuality.sk*, which had only recently taken the risky decision to support investigative journalism. The climate of hostility between sections of the media and the government, mentioned in last year’s report, worsened during 2017, and is seen as a factor contributing to a situation in which journalists, especially investigative ones, feel vulnerable.⁹³ It remains to be seen if the recent wave of support for journalists after Kuciak’s death will have a lasting effect on public trust in the profession.

Media advertising spend grew overall by 4.6% in 2017 according to Unimedia, but fell by 6% in print, which now accounts for less than 10% of the total advertising market, dominated by TV and online. With stagnating print sales, Slovakia’s established daily and weekly news titles need to boost their online sales income, so even the slight decline in consumer willingness to pay for online content indicated by this year’s survey is a worrying sign.

The last year saw two significant ownership changes. In November 2017 Ringier Axel Springer announced the



sale of Slovakia’s market-leading daily, *Nový Čas*, together with several magazine titles, in a reorientation towards digital publishing. Ringier owns *aktuality.sk* and recently bought its smaller rival *aktualne.sk*. The buyer of *Nový Čas* is businessman Anton Siekel, head of the Slovak Olympic Committee, with no track record in the news industry. In March 2018 Slovakia’s number three national daily, *Pravda*, also changed hands, acquired by the Czech group Our Media, which runs several regional TV stations and the news portals *parlamentnilisty.cz* and *parlamentnelisty.sk*, which have a dubious reputation on transparency and objectivity.

Facebook tested its Explore feed in Slovakia (and five other countries) from October 2017 to March 2018, removing posts from pages (including news organisations) from people’s newsfeeds. Interaction on the posts of top news sites halved overnight. However, even in a country where Facebook is significantly more important as a news access channel than in most other markets, the change had surprisingly little effect on traffic to news portals themselves, suggesting that organic sharing among friends may be the key mechanism driving traffic to news sites from social media.⁹⁴

2017 was marked by the contentious election in Parliament of a new DG of Slovak public TV and radio (RTVS), followed by resignations at the head of the news and current affairs department amid fears over threats to journalistic autonomy. Jaroslav Rezník, former head of the state-owned news agency TASR, is perceived to have close ties to the Slovak National Party:

STATISTICS

Population	5.4m
Internet penetration	85%

60 TV and radio staff expressed their discontent with the new leadership in an open letter of protest in April 2018. Despite this, our data on brand trust show that the public service broadcaster is the most trusted brand by those who use it and the second most trusted among those who have heard of it. Figures from Median show RTVS is still perceived as the most objective TV news source, just ahead of the leading commercial station Markíza.⁹⁵

Propaganda, distortion, and conspiracy theories are seen by many commentators as major threats to Slovak democracy. In the recent political crisis, the then Prime Minister Róbert Fico had been accused of resorting to conspiracy theories to discredit opponents, prompting some media to warn they would no longer publish government statements automatically. Recent efforts to counter these threats include SME’s weekly review of ‘fake news’ stories and *konspiratori.sk*, an initiative set up by the advertising industry which maintains a blacklist of websites publishing untrustworthy material. It is striking that one self-styled conservative, and much criticised, online news site, *Hlavné správy*⁹⁶ (with an audience reach of about 6%) is more trusted by those who have heard of it than any other of the country’s newspaper or digital-born news websites.

Simon Smith

Charles University, Czech Republic

⁹³ Nonetheless Slovakia was still rated by Reporters Sans Frontières as having the strongest press freedom in the East Central Europe: <https://rsf.org/en/slovakia>

⁹⁴ https://medium.com/@filip_struharik/what-facebook-taught-us-when-it-destroyed-our-organic-reach-cadac9c3216

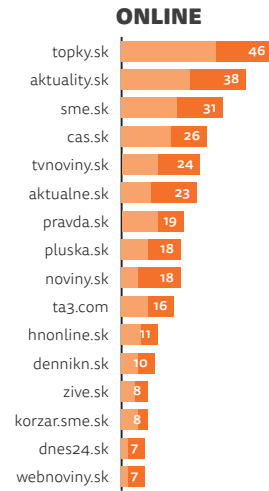
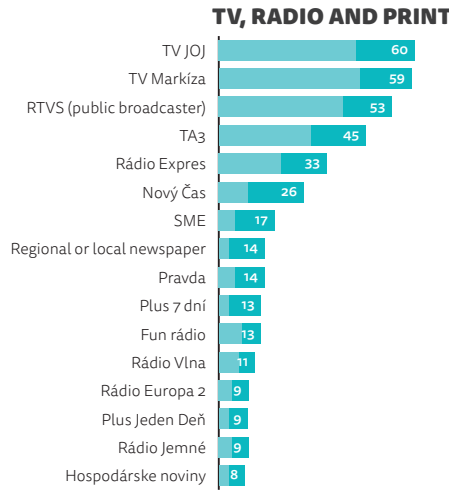
⁹⁵ http://www.median.sk/pdf/MML2017/MMLOmnibus_2017_IV_Najobjektivnejšie_TV_spravodajstvo.pdf

⁹⁶ <http://www.mediawatch.dog/hlavnespravy-sk-opat-siria-fake-news-opat-ucelovo-klamu-svojich-citateľov>; <https://dennikn.sk/521950/kto-riadi-prorusky-web-hlavne-spravy-muz-ktory-neodmieta-ani-eurofondy-2>

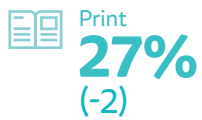
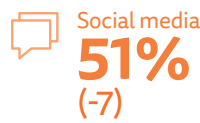
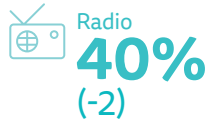
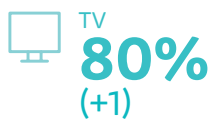
TOP BRANDS

% Weekly usage

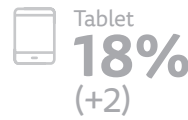
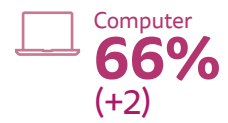
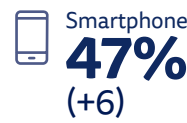
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



SOURCES OF NEWS



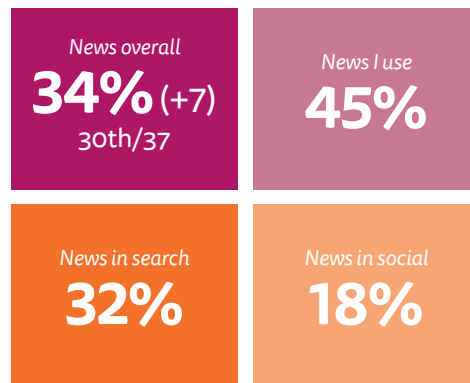
DEVICES FOR NEWS



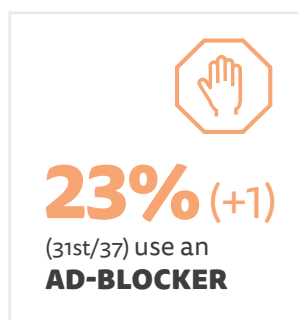
TRUST

Though still below average, trust in the news increased in 2017. Given concerns about partisan news sites, we might have expected a rise in the discrepancy between overall trust and trust in 'news I use', but the difference held steady.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	51% (-)	73%
2	YouTube	23% (+1)	64%
3	Facebook Messenger	14% (+4)	45%
4	Google Plus	7% (+1)	14%
5	Pokec.sk	6% (-1)	14%
6	Instagram	5% (+2)	18%



SPAIN

The media landscape in Spain is characterised by popular broadcasters, a newspaper sector which declines in print but leads online, with *El País* and *El Mundo* in first and second place, and some of the most diverse and competitive digital-born news brands in Europe. Meanwhile the sovereignty crisis in Catalonia has put journalism to the test.

Extensive coverage of the referendum in Catalonia and the response from the State – including police deployment, direct instructions to the Catalan government, judicial action, and a snap regional election – went on for months. Around this very divisive issue, the four Madrid-based newspapers and the two main titles in Catalonia joined the main Spanish political parties in defending the legal status quo. The leading and most moderate paper in Catalonia, *La Vanguardia* (50% total offline/online reach in this territory) called for dialogue in face of a ‘devastating’ situation. A broader spectrum of views was reflected by commercial TV and radio, where political talk shows dominated airtime, and by digital-native sites in Madrid and Barcelona.

Spanish public broadcaster RTVE is regularly criticised for pro-governmental bias in its news coverage and a lack of balance in its use of sources and commentators; a law in September established open and public competition and the need for a two-thirds (rather than simple) majority in Parliament for appointing its governing board and presidency, but the subsequent process has been severely delayed. The Catalan Broadcasting Corporation CCMA is also questioned for focusing so much on the pro-independence process, despite the high audience ratings of TV3 and Catalunya Ràdio, fully in Catalan language.

The Spanish government has recently set up a working group of the national parliament to deal with the issue of ‘fake news’. Politicians, publishers, and representatives from online search and social media platforms have been invited to contribute, but as elsewhere there are concerns that government action could threaten press freedom.⁹⁷



In the last ten years, the audience for print newspapers in Spain has almost halved, with magazines losing a third of their reach, according to the Estudio General de Medios (EGM) survey. There was a slight decline in TV, but 85% of over 14s still watch it daily, and six in ten users listened to radio of any kind. A record 75% went online every day in 2017, up from 26% a decade before.⁹⁸ The circulation crisis affecting print dailies in Spain has led to the closure of 26 newspaper presses in twelve years. *El País* has now outsourced its own printing with editor-in-chief Antonio Caño saying: ‘It is necessary to allocate efforts and resources to where readers and the future really are – in the new technological platforms.’⁹⁹

The increase in digital advertising has not compensated for the decline in traditional ads for the main media houses in Spain, according to InfoAdex.¹⁰⁰ Broadcast television groups Atresmedia and Mediaset account for 85% of the advertising expenditure, even if they only attract half the audience. The main telecom operators promote bundled offers with a landline, mobile, broadband, and interactive television with VOD such as Netflix and HBO. In response, legacy broadcasters, including the three largest free-to-air channel groups – Mediaset, Atresmedia, and RTVE – and the regional PSBs, are working on a common on-demand video distribution platform over digital terrestrial television.¹⁰¹

Spain has one of the most diverse home-grown, digital-born sectors in Europe, with the two most successful *El Confidencial* (19%) and *Eldiario.es* (18%) now third and fourth respectively in weekly reach. Both are independent and journalistically motivated organisations; the latter reached 30,000

STATISTICS

Population	46m
Internet penetration	87%

voluntary paid members in April 2018, whereas the former specialises in premium ad format innovation. Alternative and sometimes partisan sites such as OKDiario (12%), established in September 2015 by a high-profile investigative journalist and aimed at ‘non-conformists’ seeking exclusives, eye-catching headlines, and hard-line editorials, are more successful than elsewhere.

Encarna Samitier became the only current female editor-in-chief of a national general-interest newspaper, as new owners Henneo appointed her to lead *20 minutos*, a print freesheet in some cities and a digital-only brand elsewhere; it is the second-largest source of online news for adults under 45, reaching 23% weekly, with *El País* at 28% in this age band. Henneo also bought digital-born *Lainformacion.com* and refocused it on business news, and Axel Springer launched *Business Insider Spain*. *BuzzFeed Spain* (8% weekly reach among under 35s) continues not to cover general news; it focuses on popular culture, evergreen viral posts, and content with a feminist perspective on its vertical *BuzzFeed LOLA*.

The two main remaining newsweeklies in Spain, *Interviú* and *Tiempo*, known for their investigative journalism among other features, closed down in January 2018. They belonged to Grupo Zeta, publisher of Barcelona-based *El Periódico*, which itself is restructuring severely.

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⁹⁷ http://www.abc.es/espana/abci-congreso-crea-grupo-trabajo-para-luchar-contra-fake-news-201803182108_noticia.html

⁹⁸ <http://www.aimc.es/aimc-cont3nt/uploads/2017/05/resumegm317.pdf>

⁹⁹ https://politica.elpais.com/politica/2017/12/16/actualidad/1513457282_998706.html

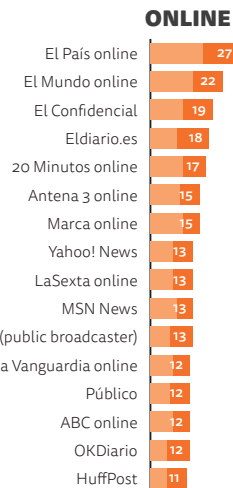
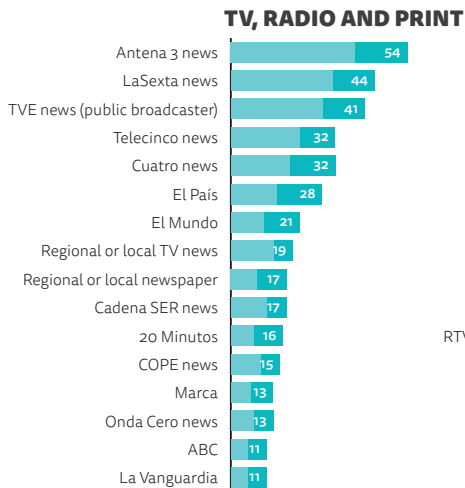
¹⁰⁰ <https://www.estrelladigital.es/articulo/economia/publicidad-television-generalista-retrocede/20180311175528343196.html>

¹⁰¹ <http://www.elmundo.es/television/2018/03/21/5ab27c77e2704e12448b47e5.html>

TOP BRANDS

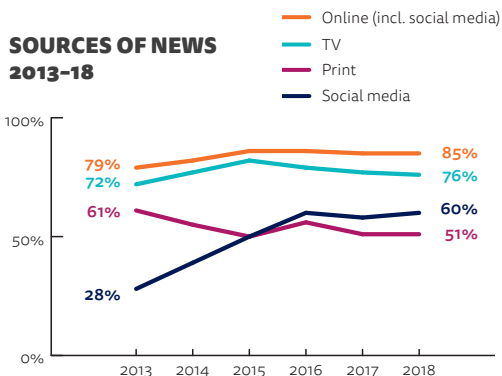
% Weekly usage

- Weekly use TV, radio & print
- At least 3 days per week TV, radio & print
- Weekly use online brands
- At least 3 days per week online brands

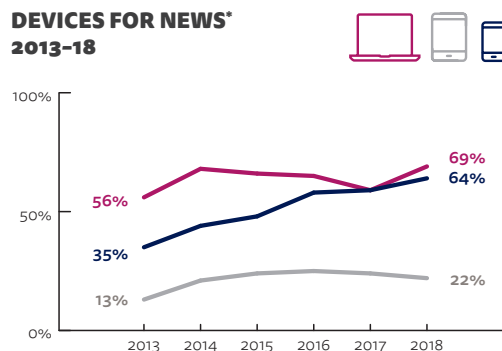


CHANGING MEDIA

Social media use for news has levelled off after several years of continuous growth. Meanwhile two thirds now access the news on smartphone (64%) up 5 percentage points on 2017, with Android the majority platform. Almost a quarter (23%) now also use smart/connected TVs to access news – level with the declining tablet.



DEVICES FOR NEWS* 2013-18

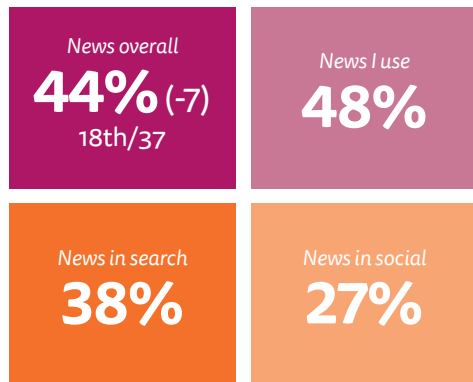


*2018 computer data may be overstated – see methodology for more information

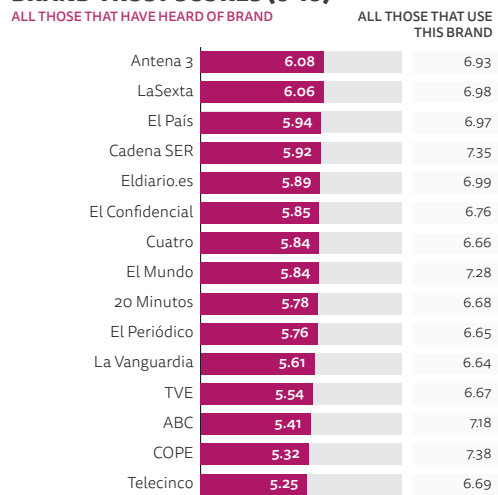
TRUST

Commercial broadcast brands that prioritise news are the most trusted in Spain. The two most successful digital-native sites (Eldiario.es and El Confidencial) also do well. Public service broadcaster TVE is among the lowest-scoring.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



11% (+2)
(20th/37) pay for **ONLINE NEWS**

31% (+3)
(9th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	48% (+1)	75%
2	WhatsApp	36% (+4)	82%
3	YouTube	26% (+2)	74%
4	Twitter	22% (+4)	39%
5	Instagram	8% (+2)	35%
6	Google Plus	5% (-)	13%

53%

SHARE NEWS
via social or email



32%

COMMENT ON NEWS
via social or website



SWEDEN

Swedish audiences are served by a vibrant mix of strong commercial and public service media. Local and national newspapers are amongst the most successful in the world at driving digital subscriptions.

Traditional news business models are under pressure in Sweden, as elsewhere. Most news publishers continue to generate significant revenues, but only after cutting staff and implementing efficiency programmes. The total number of newspaper titles remains relatively consistent, but the cost of distributing each single copy continually increases, compounded by declining print subscribers. These problems are especially critical in less-populated areas, and several news publishers (such as MittMedia) are on the verge of shifting to postal distribution. Prompted by the report of the Media Inquiry in late 2016, the government came up with plans for an increase in subsidies for print newspaper distribution, support for local journalism in 'news deserts', as well as support for innovation and development.¹⁰² The EU Commission, however, must accept the plans before they can be implemented.

Industry data from IRM Media show that the overall advertising revenues in Sweden increased to 37.7 billion SEK (US \$4.5bn), further fuelled by growth in online advertising, especially from social media and online video. Print advertising is in decline. A Nordic-focused report on ad wars shows how digital intermediaries such as Google and Facebook have developed into extremely successful competitors, taking most of the advertising pie from news publishers.¹⁰³ Importantly, with the declines in print advertising and the rise in use of ad-blockers (32%), many Swedish news publishers nowadays make most of their revenue from direct payments from users. Sweden scores second highest in our survey when it comes to paying for news, with one in



four (26%) paying for some form of digital news access in the last year. By the end of 2017 the largest news publisher in Sweden, *Aftonbladet*, had a quarter of a million paying online news subscribers. Their profit for the full year was 255 million SEK (US \$30m), an increase on the previous year. *Svenska Dagbladet* and the many newspapers run by GOTA Media and MittMedia, have also increased their online subscription base.

Most Swedish news media run their own websites and apps in addition to selecting news for third-party platforms like Facebook, YouTube, and Twitter. This enables commercial and public service media to reach broader audiences, but at the risk of helping digital intermediaries to build their own businesses by capitalising on the resulting data. Some news publishers get a significant proportion of their digital traffic via intermediaries (e.g. *Expressen*), whereas other news publishers have deliberately sought to restrict traffic and reduce dependence on third-party platforms (e.g. MittMedia).

Our 2018 survey findings show that mobile news consumption has continued to rise, and is now used by three out of four Swedes. Mobile news remained slightly higher than news access via computers, and much higher than tablets. TV remains the second most used news source, whereas print scores significantly lower. In comparing the reach of these sources and devices for news one should take into account that the time spent accessing the news varies significantly,

STATISTICS

Population	10m
Internet penetration	93%

but also that many Swedes use different news media in a complementary way.

The survey data also provide unique findings into the extent in which Swedes turn to 'partisan' and anti-establishment news sites, with four different sites each reaching around one tenth of the Swedish online population on a weekly basis. By comparison, the online news sites of national quality newspapers and public service broadcasters range from 15% to 46%. Kristoffer Holt's research shows these partisan sites to be mostly positioned on the right wing, presenting themselves as alternatives to the legacy media, who are perceived to censor critical information on issues such as immigration.¹⁰⁴

Oscar Westlund

University of Gothenburg

¹⁰² Prop. 2017/18:154 – Journalistik i hela landet.

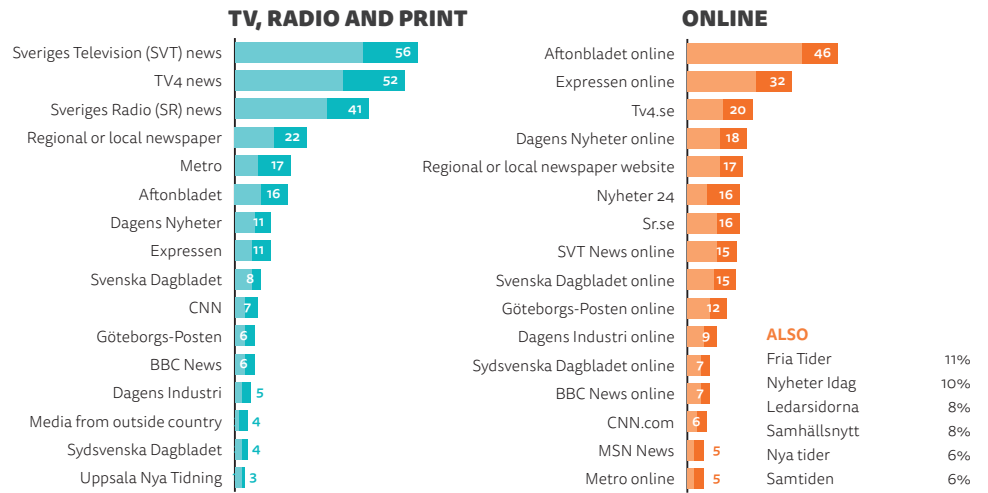
¹⁰³ J. Ohlsson and U. Facht, *Ad Wars*. Gothenburg: Nordicom, 2017.

¹⁰⁴ See e.g. K. Holt, 'Journalistik bortom redaktionerna?' in SOU 2016:30 Människorna, medierna, marknaden (pp. 403–28). Stockholm: Wolter Kluwers, 2016.

TOP BRANDS

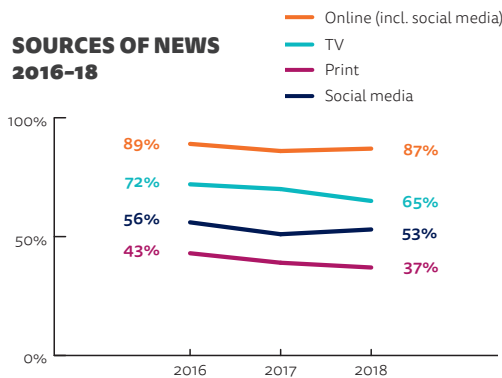
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

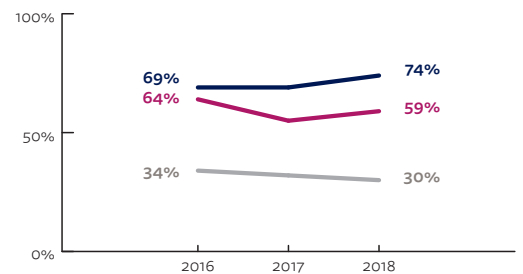


CHANGING MEDIA

Online and mobile media are the main routes to news in this highly connected country. TV news shows signs of decline, falling 5 percentage points in the last three years while fewer than four in ten (37%) now read a print newspaper at least once a week.



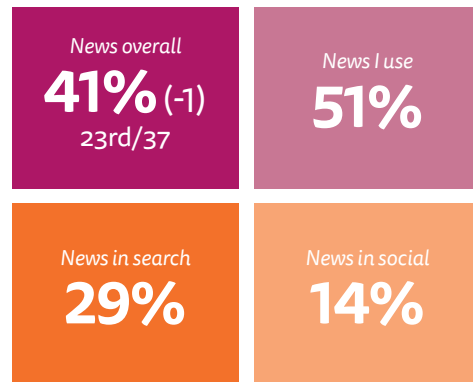
DEVICES FOR NEWS 2016-18



TRUST

Four out of ten Swedes (41%) express trust in the news in general, with higher scores for the sources they use themselves. The gap is largest for partisan sites like Fria Tider and Nya Tider where users are almost twice as likely to trust the brand compared to those who have just heard of it.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
Sveriges Radio (SR) News	6.73	7.38
Sveriges Television (SVT) News	6.68	7.19
Local or regional newspaper	6.56	7.06
Svenska Dagbladet	6.47	7.0
Dagens Nyheter	6.28	7.13
TV4 News	5.99	6.5
Ledarsidorna	5.51	7.47
Metro	5.31	5.92
Nyheter 24	5.01	5.63
Nyheter Idag	5.01	6.94
Expressen	4.99	5.58
Aftonbladet	4.89	5.61
Samhällsnytt	4.82	6.92
Fria Tider	3.83	6.77
Nya tider	3.77	6.76

PAY

26% (+6)
(2nd/37) pay for **ONLINE NEWS**

32% (+6)
(6th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	36% (-)	73%
2	YouTube	13% (+1)	64%
3	Facebook Messenger	9% (+1)	54%
4	Twitter	8% (-)	17%
5	Instagram	7% (+1)	48%
6	WhatsApp	3% (-1)	22%

30%
SHARE NEWS
via social or email

20%
COMMENT ON NEWS
via social or website

SWITZERLAND

In turbulent times for Swiss media, a referendum to abolish licence fees was rejected at the polls, but intense pressure on the public service media remains. Meanwhile, and much less publicly noticed, concentration in the private media sector has intensified.

In March 2018 voters in Switzerland decisively rejected (72%) a proposal to abolish the broadcasting licence fee, which funds multi-lingual public service operator SRG SSR (SRF/RTS programmes) and partly finances 34 regional private radio and TV stations ('No Billag' initiative). Public debate and earlier polls had made many expect a closer outcome, and the discussion before the vote was highly emotional and polarised. According to our regular 'Vote Monitor' analyses, no campaign in recent years started as early and triggered as much media attention as the 'No Billag' initiative.¹⁰⁵ Most media coverage was critical of the initiative, reflecting the stance of the vast majority of political parties and organisations. However, news coverage was also highly critical of the current performance of SRG SSR.

Legal actions are still outstanding against SRG SSR over its participation in Admeira, an advertising platform it founded with the state-owned telecom and cable company Swisscom and the private media company Ringier, which specialises in tabloid journalism, event marketing, and ticketing. Under pressure from political parties from the right and from private media, the public broadcaster promised reforms and announced hours after the referendum that it will start cutting costs also since it expects to generate 100m Swiss francs less in future. While cutting costs in administration etc., the SRG SSR claims it will use more resources for the production of news.

The public broadcaster is braced for further challenges with Switzerland's largest party, the right-wing populist SVP, considering a new vote to halve the licence fee. The Swiss government will present a new law on media policy in the summer of 2018,



which might direct revenue from the public broadcaster to private online media companies.

Various players in the Swiss media landscape have diverging interests, different economic difficulties, and their relationships range from competition to cooperation. This can be seen in the turbulent changes in Switzerland's only remaining news agency SDA, which is owned by both private media and the SRG SSR and receives a small part of its budget from the national administration. In early 2018, the owners partially sold SDA to the Austrian news agency APA, and announcements to cut almost a quarter of all journalism jobs led to a widely covered strike by SDA's staff.

As in previous years, media organisations have intensified both cost-cutting and cooperation,¹⁰⁶ developments that markedly increase media concentration. First, starting in 2018, Tamedia, Switzerland's largest private media company, is further homogenising its news outlets, affecting the main (regional) newspaper in each of Switzerland's five largest cities. Except for its tabloid *Le Matin* and for its top free-sheet brand *20 Minuten* (20 minutes), all national and international core news and sports are to be produced centrally. Only local content and comment sections will continue to be unique. Secondly, Tamedia has bought Goldbach Media, Switzerland's largest advertising sales company, becoming the main competitor of Admeira in the ad market. Thirdly, NZZ Mediengruppe and AZ Medien announced in late 2017 that they will create a joint venture including their regional press and online news outlets.

STATISTICS

Population	8.5m
Internet penetration	89%

Against this overall trend of media concentration and downsizing of journalism, new online pure players have entered the scene. *Watson.ch*, active since 2014, has established itself among the top online brands (14%). More recent arrivals include *Republik*, focused on quality reporting, that launched after a widely covered crowdfunding drive in April 2017 had generated more than 3m Swiss francs in subscriptions and donations. Similarly, in French-speaking Switzerland, *Bon pour la tête* was launched, intended to partially fill the gap after the highly respected news magazine *L'Hebdo* had been shut down by Ringier in 2017 for cost reasons. With a different concept, *nau.ch* started in late 2017, focusing on (domestic) breaking news, mainly spread on social media channels and on screens in regional public buses and at petrol stations. However, none of these players is reaching more than 3% of online users, thus not yet making it to the list of top brands, which remains relatively stable.

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¹⁰⁵ <http://www.foeg.uzh.ch/de/analyse/dossier.html>

¹⁰⁶ See the latest edition of the 'Yearbook 2017: The Quality of the Media' at <http://www.foeg.uzh.ch/en/jahrbuch.html>

TOP BRANDS

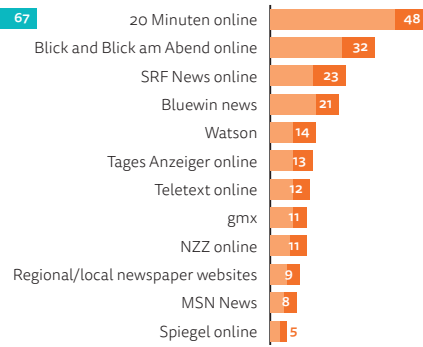
% Weekly usage

- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands

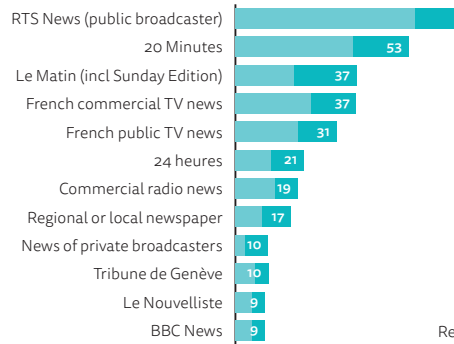
TV, RADIO AND PRINT (GERMAN)



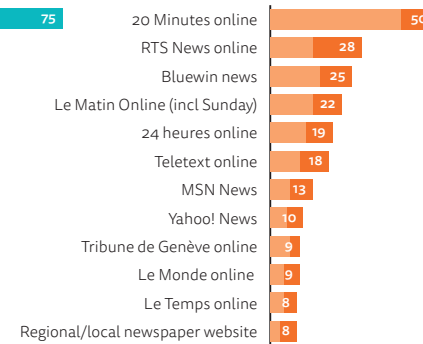
ONLINE (GERMAN)



TV, RADIO AND PRINT (FRENCH)



ONLINE (FRENCH)



12% (+1)

(17th/37) pay for **ONLINE NEWS**

German 11%
French 15%

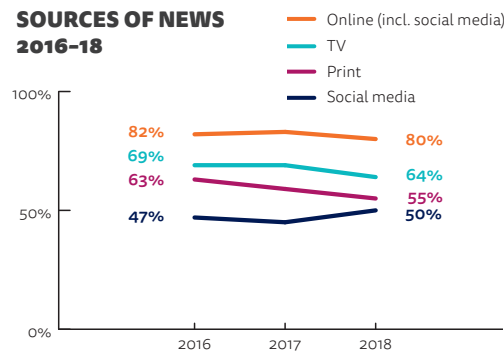


29% (+10)

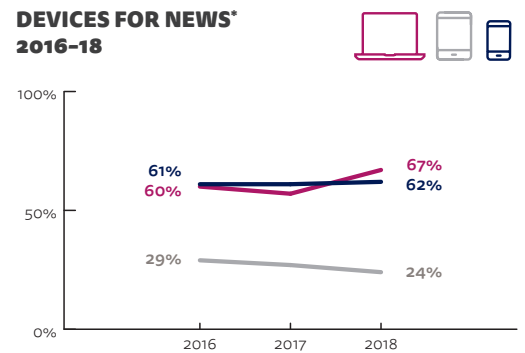
(14th/37) use an **AD-BLOCKER**

German 28%
French 31%

SOURCES OF NEWS 2016-18

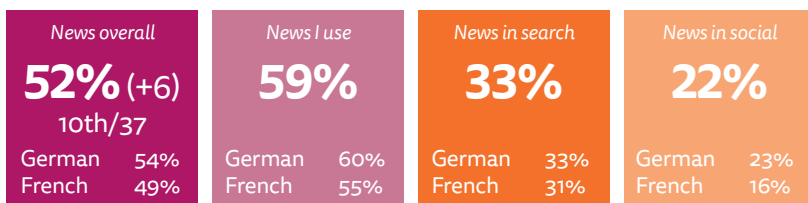


DEVICES FOR NEWS* 2016-18



* 2018 computer data may be overstated - see methodology for more information

DIFFERENT TYPES OF TRUST



33%

SHARE NEWS
via social or email

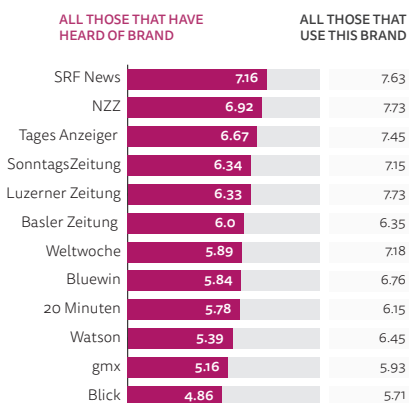


18%

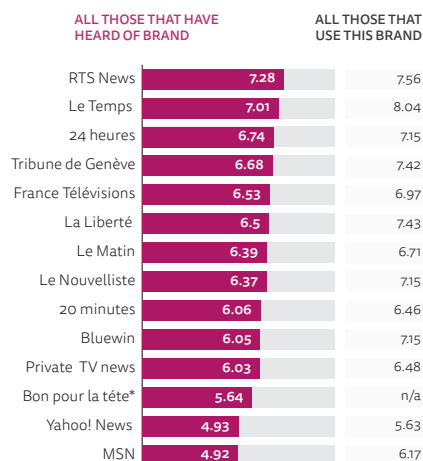
COMMENT ON NEWS
via social or website



BRAND TRUST SCORES (0-10) (GERMAN)



BRAND TRUST SCORES (0-10) (FRENCH)



* Note: No figure for users of Bon pour la tête (did not meet 50 minimum threshold)

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	33% (-2)	62%
2	YouTube	24% (+1)	61%
3	WhatsApp	22% (+1)	67%
4	Instagram	7% (+2)	26%
5	LinkedIn	7% (+2)	21%
6	Facebook Messenger	7% (+1)	31%

TURKEY

STATISTICS

Population	80m*
Internet penetration	70%

Media Freedom in Turkey has deteriorated over the last year with further intimidation of journalists, new laws to restrict internet broadcasts, and the sale of a leading media group to a pro-government businessman.

Turkey has been under a state of emergency since a failed coup attempt of July 2016, which has enabled the ruling AK party to gradually strengthen its control over the media. Independent watchdog Freedom House has classified Turkey as 'not free' for the first time this year.

First, at the suggestion of the ruling party, a law on internet broadcasting was introduced, requiring online video streaming services to apply for a licence from the regulator, RTUK. Access can be blocked if the permits are not secured. RTUK checks the content, and has the power to issue fines. Opponents say the government is tightening controls ahead of planned elections, with powers to block and remove content from news sites and social media already being used. As five of the nine members on RTUK's governing council are appointed by the ruling party, critics argue that the licensing mechanism itself is likely to be abused by the government.

While the content of the law is open to discussion, a leading expert, Yaman Akdeniz, says: 'Every Turkish media service provider with internet media services operating from outside Turkey will be subject to licensing.'¹⁰⁸ In theory any journalist or individual who posts a video on the internet will also need a licence.

This is likely to affect alternative news providers, since most of the news outlets which can criticise the government are online, and the internet is the main news source for people who oppose the government.¹⁰⁹ Live streaming through Periscope and YouTube have increasingly become popular for free media like Medyascope TV and Özgürüz. DW Turkish also increased its content on YouTube by hiring several experienced Turkish



journalists. Some independent journalists such as Ünsal Ünlü stream regular live news shows as well. Perhaps as a result, news usage of YouTube (+9) and Twitter (+10) has risen significantly in the past year.

Another related development is the sale by Turkish media mogul Aydın Döğan of all his media outlets to Demirören Holding, a pro-government conglomerate with interests primarily in energy and construction. Döğan Media owned the top-selling *Hürriyet* daily, CNN Turk, a nationwide news agency, TV channels, radio stations, and the Yay-Sat distribution network. In a phone conversation with then Prime Minister Tayyip Erdoğan in 2014, a recording of which was leaked, the owner of Demirören Group was apparently reduced to tears and apologised for a critical article in his newspaper.¹¹⁰

Opposition figures have said the sale creates a 'big monopoly' in Turkish media, and it is widely seen as being likely to further limit the free press. Veteran journalist Kadri Gürsel tweeted: 'By this huge takeover including *Hürriyet*, Turkish mass media industry comes under the direct political control of President Erdoğan.' It is significant to note that the Döğan Group was larger than Demirören when the ruling party came into power in 2002.

For the first time this year, our data now show trust scores for individual news brands. It is striking that pro-government outlets like Sabah and Ahaber, and public broadcaster TRT have the lowest trust among people who are simply aware of

them, whereas media that take a more critical line such as FOX, *Cumhuriyet*, and *Sözcü* are at the top.

Traditional media brands using content repackaged from print, television, or from news agencies, and digital-born web portals which aggregate stories from the same sources continue to represent the biggest online media. Apart from them, there is only one digital-born brand (Onedio) in the top online media list.

Beyond mainstream media, there are a number of smaller digital-born brands that continue to operate freely, providing alternative perspectives. These include OdaTV, T24, Diken, Duvar, Bianet, Medyascope TV, Ahal News, which is funded by Al Arab Publishing, Journo, and ArtıTV. However, they have not yet established sustainable models, and cannot afford to employ full-time experienced reporters for investigative journalism. They are mostly accessed by the educated people in the big cities, and they try to reach other audiences through social media, particularly Facebook which is the most popular platform in the country.

Servet Yanatma

Visiting Research Fellow, Reuters Institute for the Study of Journalism

¹⁰⁸ <https://www.osce.org/representative-on-freedom-of-media/373846?download=true>

¹⁰⁹ Servet Yanatma, *Reuters Institute Digital News Report 2017: Turkey Supplementary Report (2017)*: <http://reutersinstitute.politics.ox.ac.uk/sites/default/files/2017-11/Turkey%20Digital%20News%20Report.pdf>

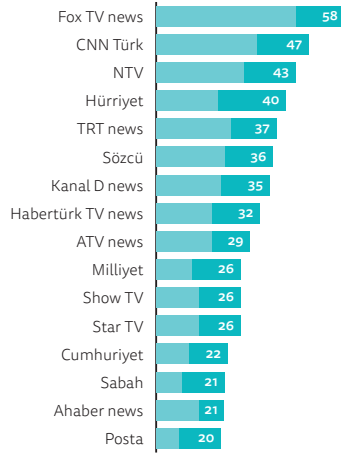
¹¹⁰ <https://www.nytimes.com/2018/03/21/world/europe/turkey-media-erdogan-dogan.html>

TOP BRANDS

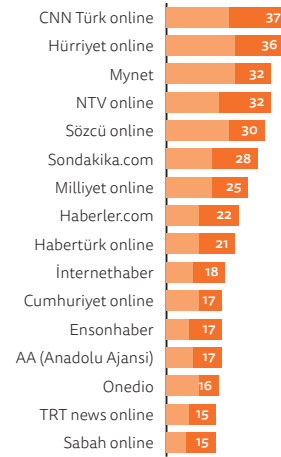
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

TV, RADIO AND PRINT



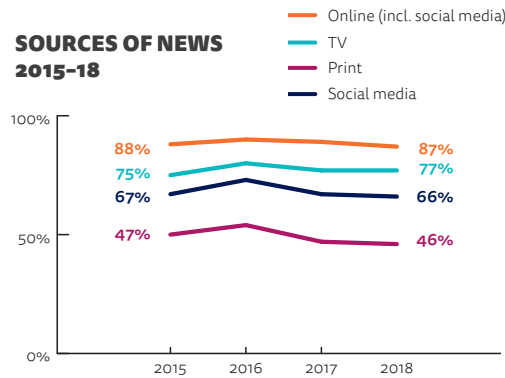
ONLINE



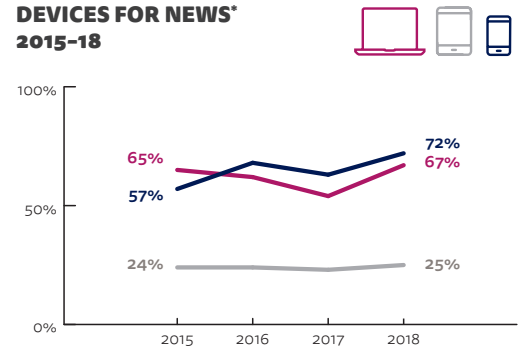
CHANGING MEDIA

Two-thirds of our urban sample (66%) use social media for news, though this has declined from a peak of 73% in 2016. In Turkey many people are switching to closed messaging apps like WhatsApp (30%) to discuss the news. Meanwhile the smartphone (72%) remains the most frequently used device to access news.

SOURCES OF NEWS 2015-18



DEVICES FOR NEWS* 2015-18

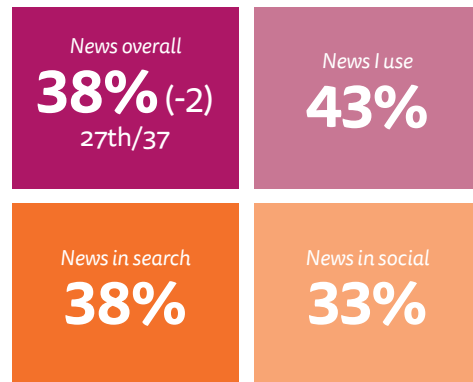


*2018 computer data may be overstated - see methodology for more information

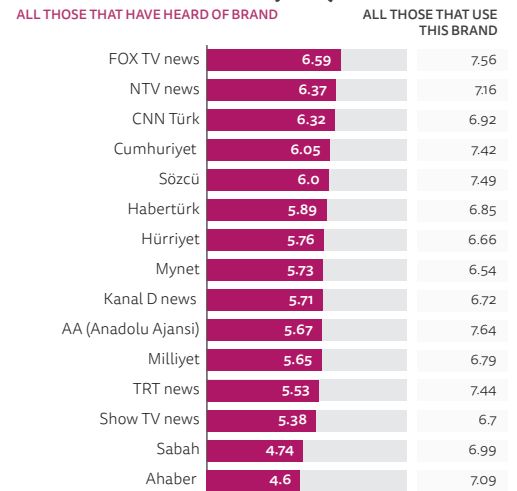
TRUST

Trust in news overall has declined (-7 over the last three years) as government control over the media has increased. Distrust (40%) in news is higher than trust (38%) for the first time with very few sitting on the fence, showing the extent of media polarisation.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



26%
(2nd/37) pay for **ONLINE NEWS**

33% (+6)
(4th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	51% (-3)	76%
2	YouTube	41% (+9)	75%
3	Twitter	35% (+10)	51%
4	WhatsApp	30% (+5)	74%
5	Instagram	24% (+7)	59%
6	Facebook Messenger	9% (-)	35%

56%

SHARE NEWS
via social or email



44%

COMMENT ON NEWS
via social or website





Section 3

Analysis by Country

Americas

Americas		
3.25	United States	112
3.26	Argentina	114
3.27	Brazil	116
3.28	Canada	118
3.29	Chile	120
3.30	Mexico	122

USA

Some leading US news outlets have benefited from a year in which the relevance of the press has never been more apparent. Across the industry, however, traditional and digital-born media alike continue to struggle for audience attention and advertiser dollars.

The 2016 election of Donald Trump continues to send shockwaves through the US media. For journalists, the theme of the Trump era has been the relentless and frenetic pace of the news cycle, from neo-Nazi rallies, nuclear brinksmanship, and the #MeToo revelations, to multiple lawsuits alleging affairs and sexual harassment by Trump and the ongoing Special Counsel investigation. Meanwhile, the president's sharp attacks on the news media continue.

Against that backdrop, the so-called 'Trump Bump' for news publishers has not faded as quickly as predicted. The share of Americans willing to pay for online news held steady this year at its new high of 16%, after almost doubling in last year's survey. Quality national newspapers especially appear to benefit from the combination of high-profile investigative reports and a 'digital first' strategy. The *New York Times* saw digital subscription revenues rise by a fifth over 2016, itself a record year, while the *Washington Post* broke 1 million digital subscribers for the first time in 2017.

National magazines and websites focused on political coverage, such as *Slate*, *Vox*, and *Mother Jones*, have likewise benefited from elevated interest even as the dramatic post-election surge in support tapered off. Investigative non-profit ProPublica is boosting its 2018 budget 50% over last year's on the strength of contributions from small donors. In contrast, this year's survey shows that partisan sites such as Breitbart, the Daily Caller, and Occupy Democrats, despite high profiles during the election, have a fairly limited weekly reach.

But audience fatigue may be setting in. Mirroring reports of declining US news traffic from audience-trackers such as comScore, our survey shows a sizeable drop in the



STATISTICS

Population	327m
Internet penetration	90%

share of Americans who report using various news outlets on a weekly basis. Notably, the same pattern appears online and off: local newspapers, local TV news, and the major broadcast networks are all down several percentage points from last year, as are major online news aggregators like Yahoo! News and HuffPost. Other digital-born media were also not immune, with BuzzFeed and Vice seeing revenue losses.

The future of local news remains a crucial question, with consolidation and downsizing affecting outlets across the country. Alternative newsweeklies took a particularly hard hit last year – the *Village Voice* and *L.A. Weekly* saw large newsroom cuts, while *The Baltimore City Paper* closed outright. Additionally, local TV news – a source of high media usage and trust – became the subject of a controversy in April when CNN revealed that Sinclair Broadcast Group, which owns nearly 200 stations nationwide, told its anchors to read a script about 'the troubling trend of irresponsible, one-sided news stories plaguing our country'.

Some new initiatives are responding to the local-news deficit. ProPublica's Local Reporting Network supports a full-time investigative reporter in seven newsrooms in cities with populations below 1 million, while Report for America is a Teach for America-style programme connecting emerging journalists with local newsrooms. Facebook announced that, despite an overall decrease in news on users' feeds, it planned to prioritise news from local publishers, starting in the US and expanding in 2018.

Collaboration remains an important trend in US newsrooms, supported by a growing variety of conferences, funding sources, and

collaborative reporting tools. US outlets such as the *New York Times*, the Center for Investigative Reporting, Univision, and the Columbia Journalism School contributed to the Paradise Papers report, and ProPublica launched the 'Documenting Hate' project with hyperlocal, regional, and national print and broadcast partners, among many others.

The magazine industry also saw a major shift, with Iowa-based media company Meredith Corp. completing its purchase of storied publisher Time Inc. for \$1.8 billion in January 2018. Meredith, known for lifestyle magazines, announced in March that it planned to sell several of Time's flagship titles, including *Time*, *Fortune*, *Money*, and *Sports Illustrated*.

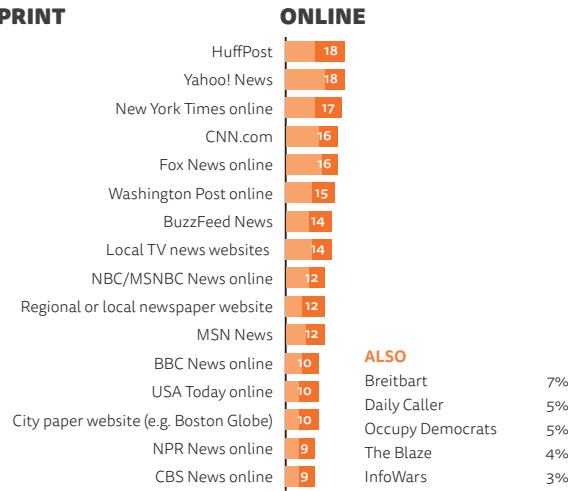
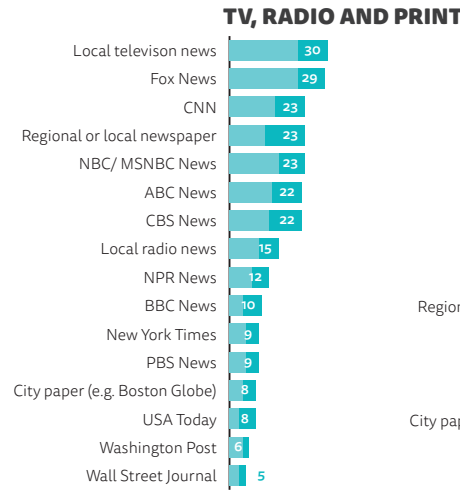
Finally, platforms have continued to stoke controversy. In March 2017, hundreds of companies pulled ads from YouTube after they were placed next to extremist content; the site came under fire again months later for videos depicting children in disturbing situations. Reports also surfaced that the UK firm Cambridge Analytica harvested the personal data of up to 87m Facebook users and may have used it on behalf of the Trump and Brexit campaigns, compounding the social network's troubles in the 'fake news' era.

Lucas Graves and Joy Jenkins
Reuters Institute for the Study of Journalism

TOP BRANDS

% Weekly usage

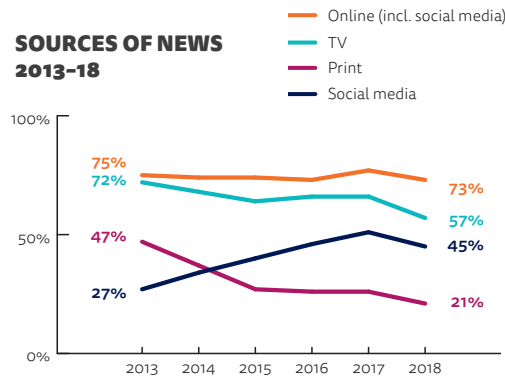
- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands



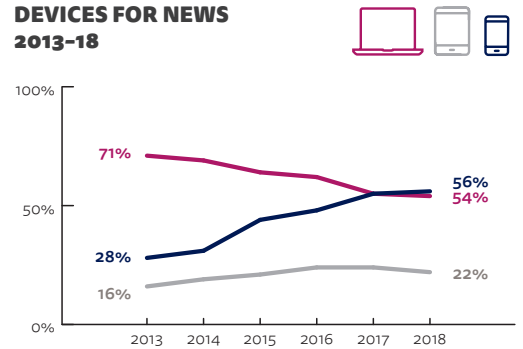
CHANGING MEDIA

Consumption of news has fallen significantly across TV, online, print, and social media from a high point last year, which coincided with the Trump inauguration. TV news has been worst affected but social media are also down 9 points. More people access news via smartphone than by a computer or laptop for the first time.

SOURCES OF NEWS 2013-18



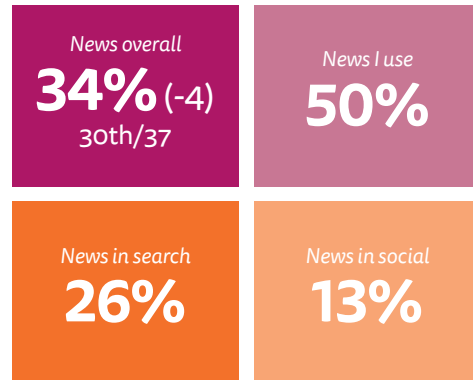
DEVICES FOR NEWS 2013-18



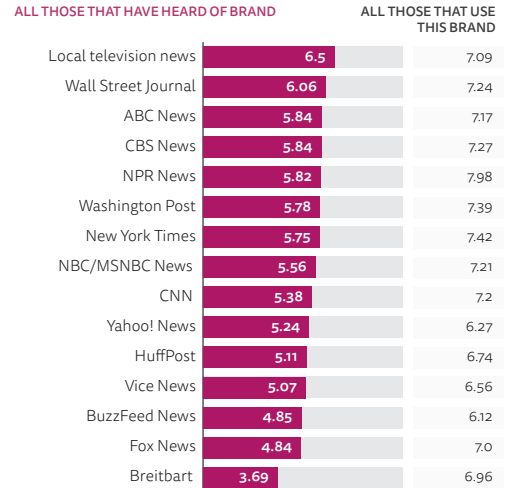
TRUST

Attacks on the 'fake news' media by Donald Trump may have contributed to a slight decrease in overall trust (-4). Revelations about the use of Facebook data in the 2016 elections help explain low trust in social media (13%).

DIFFERENT TYPES OF TRUST




BRAND TRUST SCORES (0-10)





16% (-)
(11th/37) pay for **ONLINE NEWS**



27% (+4)
(18th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	39% (-9)	68%
2	YouTube	20% (-)	62%
3	Twitter	14% (-1)	26%
4	Facebook Messenger	7% (-2)	39%
5	Instagram	6% (+1)	27%
6	Snapchat	5% (+3)	17%

35%
SHARE NEWS
via social or email



24%
COMMENT ON NEWS
via social or website



ARGENTINA

STATISTICS

Population	44m
Internet penetration	79%

Argentina is characterised by a strong and concentrated private media system, comparatively weaker public media organisations, and high online connectivity compared to other Latin American countries.

In spite of relatively high levels of news consumption, citizens tend to distrust both the media and politicians in Argentina. Media and their regulation are often politicised, and the law to regulate convergence between broadcasting and internet services has yet to be considered by Congress.

Online and smartphone access to news has achieved a dominant position among the population surveyed for this study. Almost nine out of ten online users get their information from the internet each week – more than any other source, including television (76%) and print media (42%). Social media are a popular source of news, used by 72%, including 60% who get information on Facebook, 37% on WhatsApp, and 27% on YouTube. Seven out of ten mention the smartphone as a device to access information, compared to 63% that access news on their computers, and 17% that use a tablet.

Argentina's main newspapers have responded to declining print circulations and advertising revenues by launching paywalls. *Clarín*, the country's top-selling daily, began charging users in April 2017. *La Nación*, the second largest newspaper, followed with a similar announcement in August, and Infobae, a highly popular digital-born portal, and the most-accessed news site according to this survey, announced in November that it would also start charging for content. *Clarín* reached 50,000 subscribers in November.¹¹¹ However, it still gets three-quarters of its revenue from the print edition. Only 12% of respondents have paid for online news in the previous year, and Facebook, Google, and Netflix captured 80% of all internet traffic during the second half of 2017.¹¹² Therefore, the feasibility of online revenues replacing print revenues as the main source of income for newspapers remains to be seen.



The crisis in the news industry was also evident in the closure of newspapers, some of which had been in operation for more than a hundred years, such as 141-year-old *Buenos Aires Herald*, the country's only English-language newspaper, and 112-year-old *La Razón*. A news agency, *Diarios y Noticias*, also folded after 35 years of operation. In contrast, *Tiempo Argentino*, a newspaper that had been heavily associated with the administrations of former presidents Nestor Kirchner and Cristina Fernandez continued weekly publication as a worker-controlled co-operative.

Grupo Clarín, the most important media organisation in Argentina – which already controlled its namesake newspaper *Diario Clarín*, one broadcast television station, the largest cable company in Argentina, several cable stations, including a 24-hour news channel, an AM radio station, several FM radio stations, and an internet service provider – further consolidated its dominant position by merging with Telecom, a telecommunications company. The merger amounts to more than half of the market for broadband internet connections, and created the first company allowed to offer 'quadruple play' (landline telephony, mobile telephony, cable, and online services). Other companies will have to wait until January 2019 to offer quadruple play, according to the administration's proposed regulation, which has yet to be discussed by Congress.

Grupo Clarín's dominant stance is also evident in the positions its news outlets occupy in the top brands ranking. It owns four out of the top ten in our offline ranking,

including the first two, and four out of ten in the online ranking, including the second and third. However, for the first time, the top online outlet was Infobae, which is not a Grupo Clarín subsidiary. While there is one state-owned broadcast television station, several public cable and radio stations, and one state news agency, they have significantly lower audience levels than commercial outlets, and only one (TV Pública) appears among the top brands on the online list, and none of them are named on the radio, TV, and print ranking.

The politicisation of broadcasting, telecommunications, and communication regulation may be related to trust in the news media, which has been at comparatively low levels for some time. There have been instances of false information disseminated through the media, as documented by the country's most prominent fact-checking organisation, Chequeado, which launched a new section called 'Falso en las redes' (Fake on social media) to debunk misinformation. However, Argentines have traditionally been quite sceptical about news stories and outlets.

Eugenia Mitchelstein and Pablo Boczowski

Co-Directors, Center for the Study of Media and Society, Argentina

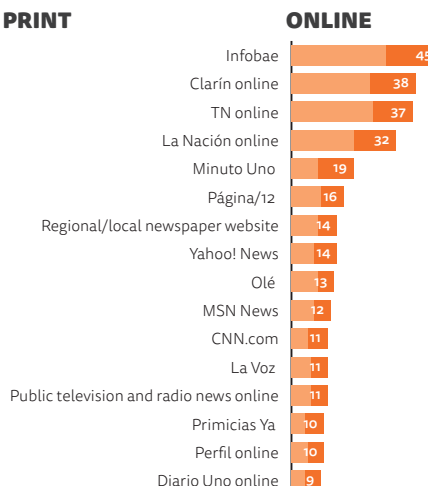
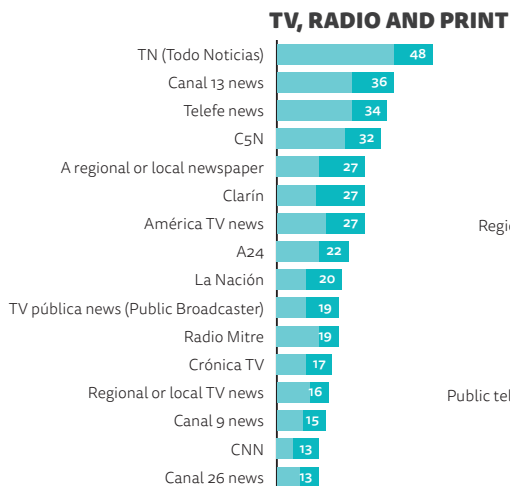
¹¹¹ Knight Center, 2017, 'Paywall en América Latina: Reporte especial del Centro Knight sobre suscripción digital en diarios de la región': <https://knightcenter.utexas.edu/es/blog/00-19005-paywall-en-america-latina-reporte-especial-del-centro-knight-sobre-suscripcion-digital>

¹¹² CABASE (Cámara Argentina de Internet), 2017 *Estado de Internet en Argentina y la Región*: <http://www.cabase.org.ar/wp-content/uploads/2017/09/CABASE-Internet-Index-II-Semestre-2017.pdf>

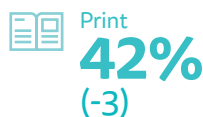
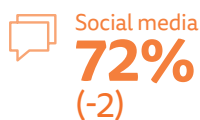
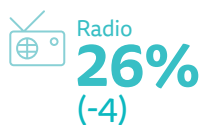
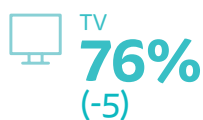
TOP BRANDS

% Weekly usage

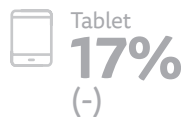
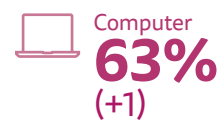
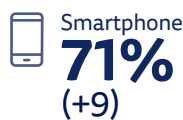
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



SOURCES OF NEWS



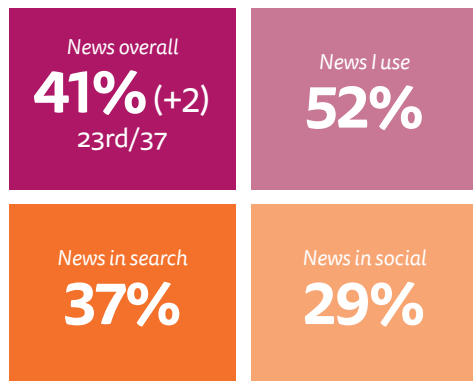
DEVICES FOR NEWS



TRUST

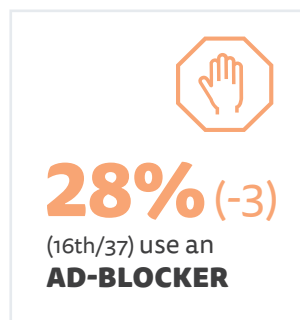
Four out of ten respondents trust the news media, a lower proportion than in 22 of the other countries included in the report. However, just over half trust the news they use, and trust in news in search and social media are lower.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
Telefé noticias	6.18	7.17
La Nación	5.91	6.87
Infobae	5.89	6.54
TN	5.86	6.97
Radio Mitre	5.73	7.66
A24	5.57	6.76
Clarín	5.46	6.45
TV pública	5.43	6.46
Perfil	5.09	6.39
Radio Diez	5.03	6.68
Página/12	4.98	6.66
C5N	4.86	6.41



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	60% (-5)	80%
2	WhatsApp	37% (-4)	80%
3	YouTube	27% (-1)	74%
4	Twitter	18% (-1)	29%
5	Instagram	13% (+4)	42%
6	Facebook Messenger	9% (-1)	36%



BRAZIL

The Brazilian media market is characterised by strong commercial broadcasters, popular online portals, and a legacy newspaper sector struggling to find new business models. At the same time, Brazilians are some of the most enthusiastic users of social networks and messaging apps in the world.

Though the numbers are slowly changing, TV continues to be the most powerful media outlet in the country. In 2017, Brazilians watched an average of six hours and 23 minutes of TV each day – six minutes more than the previous year, according to Kantar Ibope Media. Moreover, free-to-air TV stations attracted 53.6% of the gross advertising investment in the country, a marginal decrease over 2016.

Newspapers' advertising share was almost stable in annual terms. However, the total circulation of the top 11 paid-for dailies continued to shrink. In the past three years, the number of print copies sold fell by 41.4% whilst digital circulation rose 5.8% (IVC Brasil). The declining tendency might explain why the major Brazilian dailies tightened their online paywalls in 2017.

At least three regional newspapers reduced the frequency with which they publish in the last year. Founded in 1919, *Gazeta do Povo* – one of the most influential dailies in the southern state of Paraná – became a weekly publication, focusing resources on its digital version. In the north-east region, two papers published in the state of Piauí (*Meio Norte* and *O Dia*) shifted from seven to six days-a-week delivery, putting out weekend editions. Furthermore, the fashion magazine *Estilo*, a Brazilian version of the US title *InStyle*, was closed at the end of 2017.

Facebook's decision to modify the algorithm that runs the news feed, prioritising 'meaningful interactions' over 'relevant content', caused the best-selling Brazilian daily, *Folha de S. Paulo*, to stop



STATISTICS

Population	211m*
Internet penetration	66%

publishing its content on the social media platform in February 2018. At that time, the paper had 5.9m followers on Facebook. According to data compiled by *Folha de S. Paulo*, the number of interactions (shares, comments, and likes) generated by Brazil's ten largest newspapers on Facebook fell 32% in January, when compared to the same month last year. An article published on the paper's website said that algorithm changes would facilitate 'the spread of 'fake news'.

Amidst the growing debate about 'fake news' in the country, Brazil's top electoral court started to discuss with the press and the leading social media companies ways to combat the problem in preparation for the 2018's presidential elections. The Brazilian federal police has said it will identify and punish authors of 'fake news' in the absence of new legislation. Brazil has 145m voters and 130m Facebook users (Statista).

Brazilians' passion for social networks shows no sign of waning but there's clearly a change in preferences going on. Two-thirds (66%) of respondents to our survey use social media as a source of news. That's almost the same figure as the previous year. Nonetheless, the use of Facebook for news continued to decline, falling from 69% to 52% in two years.

At the same time, WhatsApp and Instagram use grew, not only for news consumption but for other purposes too. Brazil has the second largest user base on Instagram, with 50m monthly active users.¹¹³ And WhatsApp had 120m users in the country by May 2017.¹¹⁴

The country's economic recovery in 2017, after two years of recession, contributed to a 15% growth in computer sales – after half a decade of declining results (IDC Brasil). This surge in the market for PCs seems to have influenced the choice of devices used by Brazilians to consume journalistic content. Smartphone use also continues to grow.

The four biggest TV broadcasters in the country were, once again, ranked as the top offline brands in terms of weekly usage. The overall percentage of Brazilians that pay for online news stood at 22%, the fourth highest among a sample of 37 countries – in line with the rather modest growth of digital newspaper subscriptions during the last three years. The use of ad-blockers increased by almost a third over the last year as Brazilians seem to be more concerned about security and privacy issues.

Rodrigo Carro

Financial journalist and former Reuters Institute Journalist Fellow

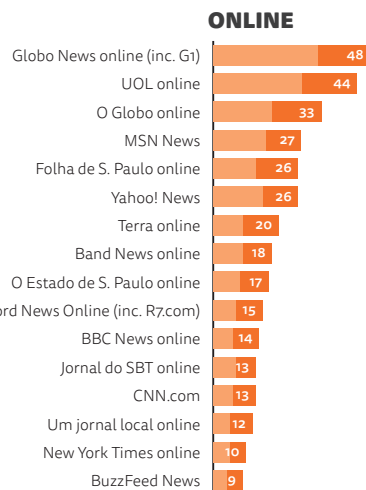
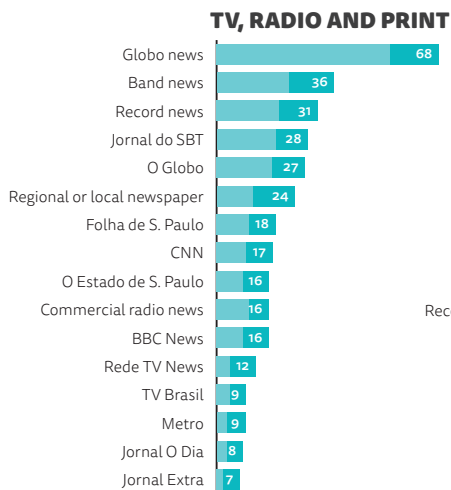
¹¹³ <http://www1.folha.uol.com.br/mercado/2017/10/1931057-com-50-milhoes-de-usuarios-brasil-e-segundo-no-ranking-do-instagram.shtml>

¹¹⁴ <http://link.estadao.com.br/noticias/empresas,whatsapp-chega-a-120-milhoes-de-usuarios-no-brasil,70001817647>

TOP BRANDS

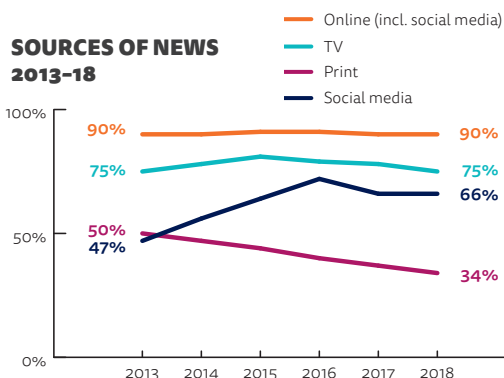
% Weekly usage

- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands

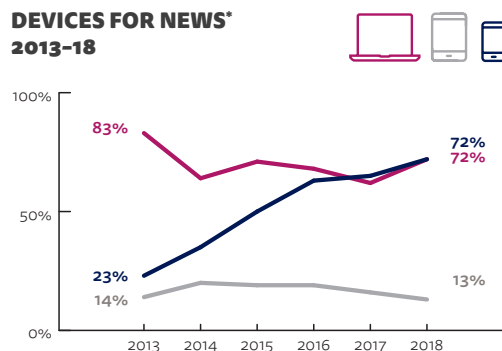


CHANGING MEDIA

Brazilians are some of the most enthusiastic users of social media in the world, but use for news has declined markedly since 2016. Most of this relates to lower interest in Facebook as newer networks such as Instagram and WhatsApp have been embraced. This goes hand-in-hand with strong growth in smartphones use for news over the last five years.



DEVICES FOR NEWS* 2013-18



*2018 computer data may be overstated - see methodology for more information

TRUST

Trust in news overall stood at a high level of 59%, well above that of the news found in social media (32%). The influence of social media on this year's presidential elections remains a key factor influencing opinion.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
Band Notícias	7.18	7.83
O Estado de S. Paulo	7.04	7.84
Folha de S. Paulo	6.96	7.49
Jornal do SBT	6.93	7.85
UOL	6.82	7.47
Record Notícias	6.79	7.8
Globo Notícias	6.78	7.33
O Globo	6.74	7.46
Terra online	6.57	7.49
Rede TV Notícias	6.43	7.59
iG. Online	6.31	7.21
HuffPost	5.87	7.41

22% (-)
(4th/37) pay for **ONLINE NEWS**

23% (+6)
(31st/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	52% (-5)	75%
2	WhatsApp	48% (+2)	83%
3	YouTube	34% (-2)	78%
4	Instagram	16% (+4)	48%
5	Twitter	14% (+2)	26%
6	Facebook Messenger	10% (-1)	39%

61%
SHARE NEWS
via social or email



38%
COMMENT ON NEWS
via social or website



CANADA

In this highly concentrated bilingual media environment, publishers are under increasing financial pressure with the closure of dozens of newspapers and associated job cuts. Government initiatives to support local journalism and digital innovation may offer some relief but the media's struggle to reinvent itself goes on.

In 2015, the *Toronto Star*, Canada's biggest selling newspaper, launched a tablet-only app that was hailed as a revolution in news. This year the app, known as Star Touch, was axed with the loss of 30 jobs after a reported outlay of as much as US \$30m. Neither readers nor advertisers had apparently shared the vision and it was replaced with a much simpler mobile and tablet app.

The *Star's* parent company, Torstar, and the Postmedia chain, which owns the *National Post* – both groups own many regional and local papers – arranged to swap 41 titles. Soon after, 36 of them closed with the loss of almost 300 jobs. In March 2018, the Competition Bureau searched the Toronto offices of both companies, because of suspicion of possible anti-competitive conduct. The Chair of Torstar's Board of Directors, John Honderich, said quality journalism was in crisis and that the company was 'very, very close to the end'.

Private TV networks are also affected. Global TV, the second-most watched private TV station, cut 80 jobs, but is creating 50 new roles, mostly for local journalists in Ontario.

The *Globe and Mail*, the second biggest paper, launched a print redesign and an online metrics strategy to guide news selection for its print edition, but stopped delivery in four provinces on the Atlantic coast. Vice Canada and Rogers Media ended their local TV co-production; Viceland Canada went off the air.

Several new media initiatives were launched. These included the Conversation Canada, a branch of an Australian-based non-profit that sources content from the



academic and research community, the *West End Phoenix*, a subscription-only print-only local publication in Toronto, and the Athletic/Athlétique Canada, offering in-depth sports coverage.

In French-speaking Quebec, home to 20% of the population, only two newspapers, *Journal de Montréal* and *Journal de Québec*, continue to issue print editions seven days a week. These are tabloids owned by the family-run company Quebecor. *La Presse* stopped its last remaining print (Saturday) edition and became 100% digital. *Le Soleil* ended its Sunday print edition in March. Community newspaper publisher Transcontinental sold dozens of its local weeklies, and is also looking to sell the Montreal edition of *Métro International*.

The daily *Moose Jaw Times-Herald* closed after more than 125 years. Another Saskatchewan newspaper, the *Prince Albert Daily Herald*, was acquired by its staff.

The Rebel Media, a hard-hitting far-right-wing website, fired one of its contributors for her coverage of a 'Unite the Right' rally in Charlottesville. Several other contributors left the site in the wake of the controversy.

The public broadcaster CBC hired four anchors for its flagship news show, *The National*, to replace veteran Peter Mansbridge; Radio-Canada, the French-language public broadcaster, sold its landmark tower and will move to a new building in 2020.

Traditional broadcasters, especially privately owned networks, are the most used media brands among Canadians. MSN News and CNN are the most popular

STATISTICS

Population	37m
Internet penetration	90%

foreign brands, although French-language respondents are less likely to use the latter.

Canada's new cultural policy for the digital age was outlined in September, including a review of the mandate of both the public broadcaster and broadcast and telecom regulator. The Liberal government named a new chair of the Canadian Radio-Television and Telecommunications Commission, Ian Scott, a telecom executive and lobbyist; and a new president and CEO for the CBC, Catherine Tait, a television, film, and digital content executive.

The 2018 federal budget provided modest support (US \$39m over five years) for local news in underserved communities, and an additional US \$7.8m for minority-language community media. Publishers had requested US \$275m a year. After years of resistance to a 'Netflix tax', the Canadian government's position seemed to waver. Quebec has promised to apply sales tax to digital products and services. It has also earmarked US \$52m over five years to support innovation in print media through an employment tax credit.

As Canada prepares to go to the polls in 2019, the Facebook Election Integrity Initiative was announced. The social media company will contribute to develop digital news literacy, offer online emergency support, and training sessions for political parties.

Colette Brin

Centre d'études sur les medias, Université Laval

TOP BRANDS

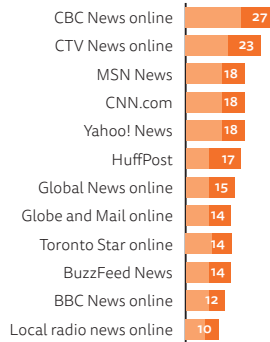
% Weekly usage

- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands

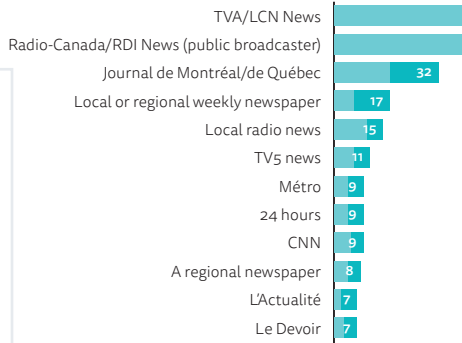
TV, RADIO AND PRINT (ENGLISH)



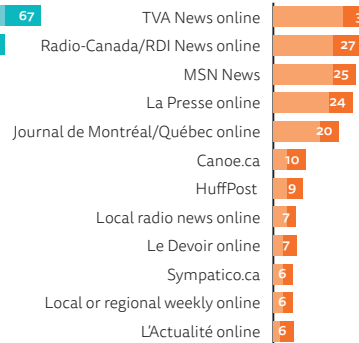
ONLINE (ENGLISH)



TV, RADIO AND PRINT (FRENCH)



ONLINE (FRENCH)

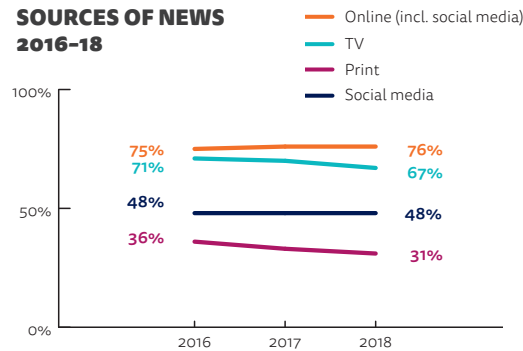


PAY

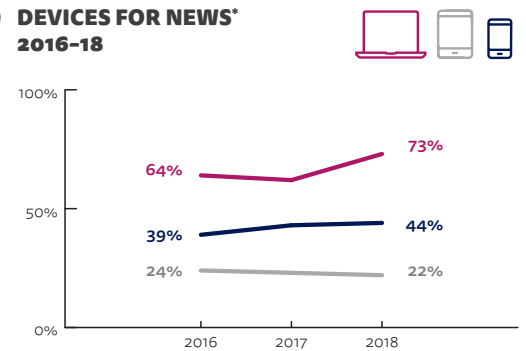
9% (+1)
(27th/37) pay for **ONLINE NEWS**

29% (+3)
(14th/37) use an **AD-BLOCKER**

SOURCES OF NEWS 2016-18

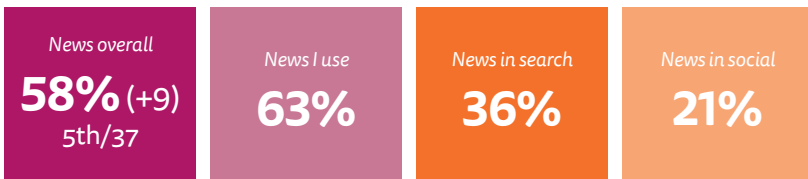


DEVICES FOR NEWS* 2016-18



* 2018 computer data may be overstated - see methodology for more information

DIFFERENT TYPES OF TRUST



34%
SHARE NEWS
via social or email

20%
COMMENT ON NEWS
via social or website

BRAND TRUST SCORES (0-10) (ENGLISH)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
CTV/CTVNewsnet	7.21	7.8
CBC/NewsWorld	7.17	7.79
Global News	7.1	7.6
Globe and Mail	7.0	7.51
CityTV News	6.92	7.59
National Post	6.85	7.57
Maclean's	6.76	7.89
Toronto Star	6.65	7.28
Vancouver Sun	6.54	7.34
Metro	6.27	7.19
24 Hours	6.26	7.47
HuffPost	6.21	6.96

BRAND TRUST SCORES (0-10) (FRENCH)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
ICI Radio-Canada Info/ICI RDI	7.87	8.2
La Presse	7.59	8.3
La Presse Canadienne	7.48	8.04
TVA Nouvelles/LCN	7.42	7.88
Le Devoir	7.42	7.88
L'Actualité	7.22	7.86
TV5 Nouvelles	7.13	8.01
CBC/NewsWorld*	7.07	n/a
CTV News*	7.04	n/a
Journal de Montréal ou Québec	6.97	7.53
24 Heures	6.77	7.43
Canoe.ca	6.64	7.8

* Note: No figure for users of CBC/NewsWorld & CTV News in the French sample (did not meet 50 minimum threshold)

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	38% (-2)	67%
2	YouTube	22% (+4)	63%
3	Twitter	12% (+1)	25%
4	Facebook Messenger	10% (+2)	44%
5	Instagram	6% (+1)	27%
6	WhatsApp	5% (+2)	16%

CHILE

News access on social media is growing in Chile, but the most important source of news is still free-to-air television. Responding to shrinking audiences and declining advertising revenues, television brands have started to expand to other platforms for content delivery.

It has been a hectic year in the Chilean media industry. Universidad Católica de Chile sold its share of Canal 13 to Andrónico Luksic, one of the richest businessmen in the country, who had already acquired a big part of the television station in 2010. This marks the end of 'university television', a model that was established almost 60 years ago when the government gave television activity to four universities. This development further increases the commercialisation of TV news, bringing Chile closer in line with other Latin American countries.

For its part, the public station, Televisión Nacional (TVN), got a capital injection of US \$47m for the digitalisation of its signal throughout the country, and another US \$18m for the creation of a cultural channel on terrestrial digital television. This injection of public money to support digitisation has reopened the debate about the role and funding of public media in Chile. TVN is the only public television service in Latin America that is financed solely through advertising (and other TV services offered to private companies), which means that it needs to compete with commercial channels for revenue and for an increasingly elusive audience.

Mega, the first private station in the country, remains the leader in terms of weekly reach (51%), and is home to many of the most popular programmes and the most watched news broadcast, *AhoraNoticias*. However, according to our survey, it is not the most trusted news brand, finding itself in sixth place. Bío Bío Chile emerged with the highest level of



trust by those who had heard of the brand. This radio station, originally founded as a local media in Concepción, became a national media player in 1991 before expanding online. Its trust comes from a journalistic track record characterised by its slogan, 'Independientes de verdad' (Truly independent).

Although many TV brands continue to perform well, advertising revenues across the industry have declined, leading several publishers to pursue greater media diversification. Examples of this include Mega's acquisition of three radio stations, the consolidation of T13 Radio (the news station of Canal 13), and creation of an FM radio station in Santiago by newspaper *El Mercurio*.

The switchover to digital terrestrial television continues according to the schedule set by the government to reach the entire nation by the end of the decade. Meanwhile, pay television (cable and satellite) added just over 3m subscribers with a growth of 4.6% in the last year. More than half of this figure corresponds to satellite television. In parallel, subscriptions to video-on-demand service Netflix grew 32.5% in the Chilean market between 2016 and 2017.

There is a clear growing trend towards majority consumption of online news on portable devices, among which the smartphone is the preferred choice, used by 82% of the online population according to our survey. Search and social media are also popular with Chileans, reflected in both the very high usage figures and the relatively high trust people have in news

STATISTICS

Population	18m
Internet penetration	77%

from these platforms.

Presidential elections were held in November 2017, in which the right-wing candidate Sebastián Piñera was elected in the second round. The campaign featured a relatively small number of false news stories that were promoted through social media. A study made by *El Mercurio* detected only around 80 'fake news' stories generated by less than 20 websites read or shared by 3.5m people on social media (Facebook, Twitter, and WhatsApp) between January and November.¹⁵ 'Fake news' is a relatively recent phenomenon in Chile and, unlike in other countries, there has not been significant public discussion about the issue.

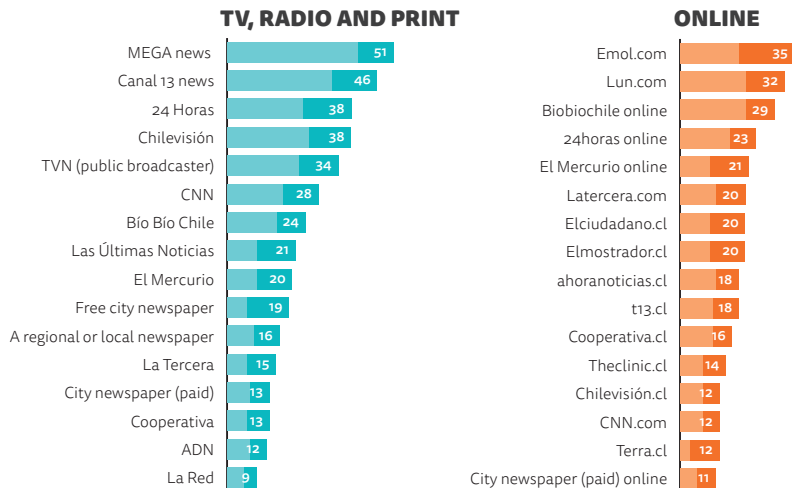
Francisco Javier Fernández Medina
Pontifical Catholic University of Chile,
Santiago

¹⁵ *El Mercurio* (2017), 'Noticias falsas sobre Chile fueron vistas o compartidas 3,5 millones de veces en redes sociales este año': <http://www.economiaynegocios.cl/noticias/noticias.asp?id=420624>

TOP BRANDS

% Weekly usage

- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



SOURCES OF NEWS

TV
75%
(-5)

Radio
36%
(-3)

Social media
71%
(-5)

Smartphone
81%
(+7)

Computer
47%
(-4)

Print
40%
(-6)

Online
(incl. social media)
89%
(-4)

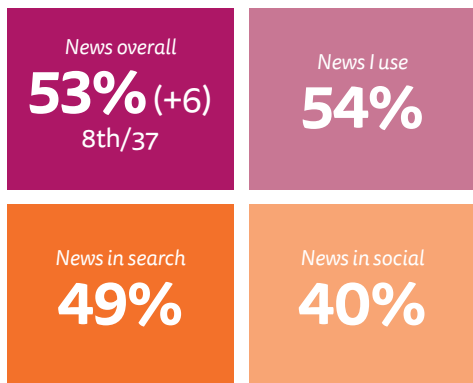
Blogs
6%
(-3)

Tablet
14%
(-4)

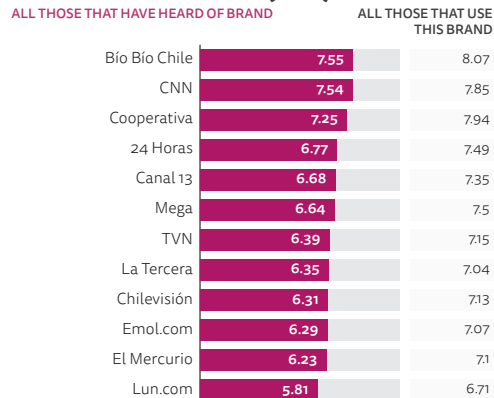
TRUST

Trust in the news in general (53%) has risen over the last year by 6 percentage points, while trust in social media (40%) and search (49%) is also relatively high by international standards.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



PAY
9% (-)
(27th/37) pay for **ONLINE NEWS**

AD-BLOCKER
24% (-)
(29th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	68% (-2)	82%
2	WhatsApp	36% (-3)	78%
3	YouTube	27% (+2)	74%
4	Twitter	18% (-5)	27%
5	Facebook Messenger	13% (-1)	46%
6	Instagram	12% (+4)	40%

60%
SHARE NEWS
via social or email



38%
COMMENT ON NEWS
via social or website



MEXICO

Commercial television brands continue to be the most popular and influential sources of news in Mexico. However, domestic digital-born sources are gaining prominence, with international social networks and other platforms helping them reach more and more people.

Traditional media companies continue to be the top choices for news and information among the Mexican population. TV Azteca and Televisa are generally considered to be the brands with the highest level of political, economic, and social influence in the country. Companies such as Grupo Imagen, Grupo Milenio, and Radio Fórmula have built brands with a loyal audience and remain popular with advertisers. Though public broadcasting did not develop in the same way as in much of Europe, Channel 22, a university television station operated by the National Polytechnic Institute (Instituto Politécnico Nacional) is also one of the most used offline news brands. The Mexican press, represented by *El Universal*, Grupo Reforma, Excelsior, and *El Financiero*, also continues to be consumed in print. However, *Proceso* is the only news magazine to retain a paper product. All of these brands are followed by the public through their digital platforms.

Mexican audiences have embraced the arrival of digital-born news sources, with a handful of them among the most popular sources of online news according to our survey. Aristegui Noticias, named after former CNN journalist Carmen Aristegui, is among the top online brands in our survey for the second year in a row. However, the list of the most popular online brands also includes legacy players like *El Universal*, which has been contributing to Mexican journalism for over one hundred years. UnoTV, another popular source of online news, belongs to the telecommunications company América Móvil, the domestic market leader in mobile telephony. The firm is increasingly immersed in journalism and entertainment through its



digital platforms. International brands like CNN and Yahoo! also have a relatively strong position in Mexico.

Internet penetration is relatively low in Mexico, which can distort some of our figures. However, it is clear that smartphones are an important device for many Mexicans, with nearly three-quarters saying they used one to access news in the last week. In common with other countries from this region, social media – particularly Facebook and WhatsApp – are widely used for news.

Mexico continues to be one of the most dangerous countries in the world to be a journalist. At the end of 2017, the Committee to Protect Journalists reported that Mexico was the deadliest country for journalists outside of conflict zones, with killings reaching a historic high against the backdrop of a global decrease.¹¹⁶

In 2018 the media will play a special role in the political life of the country as elections for President of the Republic, 128 senators, and 500 deputies will be held on 1 July. The main political parties in the contest are MORENA, PAN, PRI, Todos por México, and Juntos Haremos Historia.

Mexico has also been affected by the so-called 'fake news' phenomenon. False claims have circulated concerning Donald Trump and his position on the North American Free Trade Agreement (NAFTA), and the construction of a border wall between Mexico and the United States. There has also been a proliferation of false claims linked to the earthquake which

STATISTICS

Population	130m*
Internet penetration	65%

struck Mexico in September 2017. Media companies have also faced brand identity theft, leading to confusion amongst the public.¹¹⁷ For these and other reasons, nearly two-thirds (63%) of the online population say they are either 'very' or 'extremely' concerned about what is real and what is fake on the internet when it comes to news.

These facts, combined with the upcoming election, have motivated organisations, institutions, and the media to jointly create a verification platform, Verificado2018.¹¹⁸ This project aims to identify 'fake news' and to counter it with verified information, and will be in operation throughout the electoral process. It has received financial support from Facebook, Google News Lab, Mexicans Against Corruption and Impunity, Open Society Foundation, Oxfam, and Twitter.

María Elena Gutiérrez Rentería
Universidad Panamericana

¹¹⁶ <https://cpj.org/reports/2017/12/journalists-killed-iraq-crossfire-murder-mexico.php>

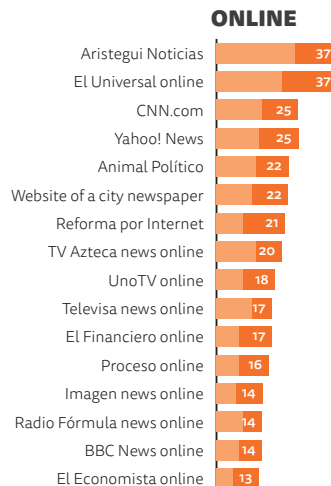
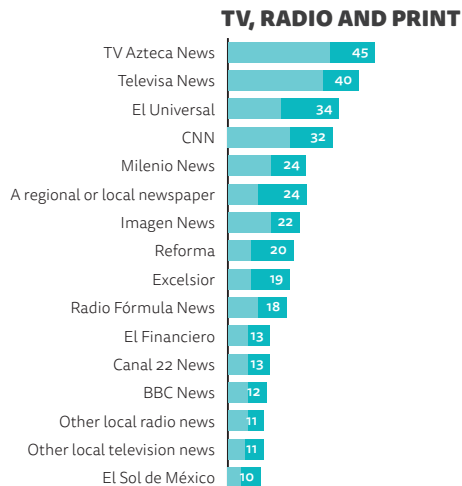
¹¹⁷ <https://aristeguinoticias.com/1202/mexico/por-denunciar-cuenta-de-fakenews-mensajes-amenazantes-contra-aristegui-noticias-video/>

¹¹⁸ <https://verificado.mx>

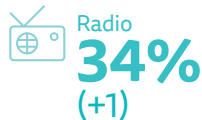
TOP BRANDS

% Weekly usage

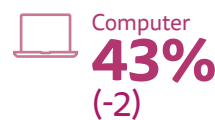
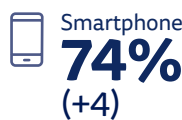
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



SOURCES OF NEWS

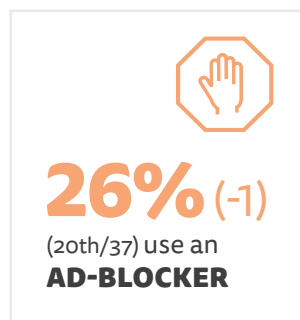
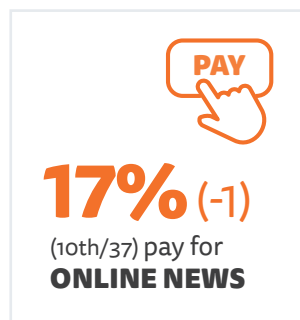


DEVICES FOR NEWS

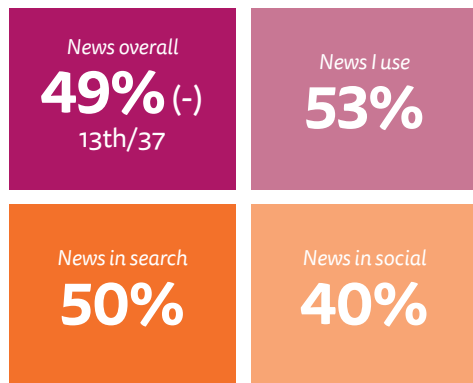


TRUST

Our survey shows that trust in the news is relatively high in Mexico. Television is the most popular medium with both advertisers and the public. However, the print brands tend to score better on trust, along with the digital-born Aristegui Noticias.



DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
Aristegui Noticias	7.65	8.67
El Universal	7.1	7.57
El Financiero	7.07	7.7
El Economista	7.01	7.96
Reforma	6.94	7.63
Canal 22	6.91	7.82
Radio Fórmula Noticias	6.83	7.5
Imagen Noticias	6.73	7.49
UnoTV	6.47	7.24
SinEmbargo	6.17	7.58
TV Azteca Noticias	5.9	7.02
Televisa Noticias	5.11	6.5

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	61% (-2)	78%
2	YouTube	37% (-2)	80%
3	WhatsApp	35% (+1)	77%
4	Twitter	23% (-)	40%
5	Facebook Messenger	15% (-1)	54%
6	Instagram	8% (-)	34%





Section 3

Analysis by Country

Asia Pacific

Asia Pacific		
3.31	Australia	126
3.32	Hong Kong	128
3.33	Japan	130
3.34	Malaysia	132
3.35	Singapore	134
3.36	South Korea	136
3.37	Taiwan	138

AUSTRALIA

Australia's media landscape has undergone a period of significant transformation over the past year. Outdated media regulations have been scrapped, US media giant CBS has entered the local TV market, and inquiries are being held into the impact of digital platforms on media competition and the future of public interest journalism.

After more than a decade of debate, outdated media ownership laws have been overhauled to reflect the digital environment. The changes involved scrapping the '75% reach rule' which prevented one organisation from broadcasting to more than three-quarters of the Australian population, and removing the '2 out of 3 rule' which prohibited ownership of television, radio, and newspapers by a single proprietor in one region. The reforms were welcomed by the media industry, but critics warn concentration of ownership could increase further.

Concern about the health of the news media in Australia has been the subject of two separate inquiries. The Australian Consumer and Competition Commission is looking into the impact of Google and Facebook (plus other search engines and platforms) on the supply of news and journalistic content and the implications for media content creators, advertisers, and consumers.

A Senate Committee Inquiry into the Future of Public Interest Journalism also considered ways the government could maintain a strong media sector. The inquiry recommended the government examine tax deductibility of news subscriptions, and extending deductible gift recipient status to not-for-profit news media organisations. The inquiry also called for an audit of national security and defamation laws which limit free reporting, improving media literacy in schools, and maintaining adequate funding for the two public broadcasters – Australian Broadcasting Corporation (ABC) and the Special Broadcasting Service (SBS).



The ABC has also been under organisational and political pressure. A major restructure has removed the traditional demarcation between television and radio, with content creation now organised around general themes of news, entertainment, and regional/rural. The changes have led to additional regional reporters and a boost to podcasting, but have also meant cuts to late-night news programming. The national broadcaster has also been in the spotlight for perceived anti-government and liberal bias which has led to concerns about the government exerting political pressure and undermining editorial independence.

Contrary to concerns about increased concentration of media ownership, US media giant CBS bought the failed commercial Ten Network, which had gone into administration. The arrival of CBS is expected to boost Ten's subscription video-on-demand (SVOD) presence, and there are hopes the company will also invest in news and current affairs which have been savagely cut at the network.

Print publications have had another difficult year. Newspaper print circulations continue to fall, with a 10% drop across the board in the 12 months to November 2017. However, combined readership figures across online and print present a more stable picture, suggesting readers are shifting from print to online editions. After a failed crowdfunding campaign, the independent children's newspaper *Crinkling News* shut down. Bauer Media ceased production of three of its smaller magazine titles, and *Rolling Stone Australia* also closed.

STATISTICS

Population	25m
Internet penetration	88%

Online, an increase in the number of publications has led to mixed results. After three years, HuffPost ended its joint venture with Fairfax media, resulting in the redundancy of 30 staff, who have moved to other news organisations and start-ups. In contrast, *Guardian Australia* has experienced a period of strong growth. In response to a membership drive, the organisation expanded its paying supporter base to 33,000. This success might partly explain an increase in the number of Australians paying for online news from 13% in 2017 to 20% this year.

Advertising continues to shift away from print to online, which now makes up 50% of ad spend, the majority of which is going to the major platforms Google and Facebook. Deloitte's media survey tells us there has also been a large increase in mobile advertising with ads on social media now rivaling TV in impact on buyer decisions.

The majority (82%) are now using online sources for news, and 52% accessing social media sources. Even so, just 24% of news consumers trust social media. In contrast trust in news overall has risen to 50%.

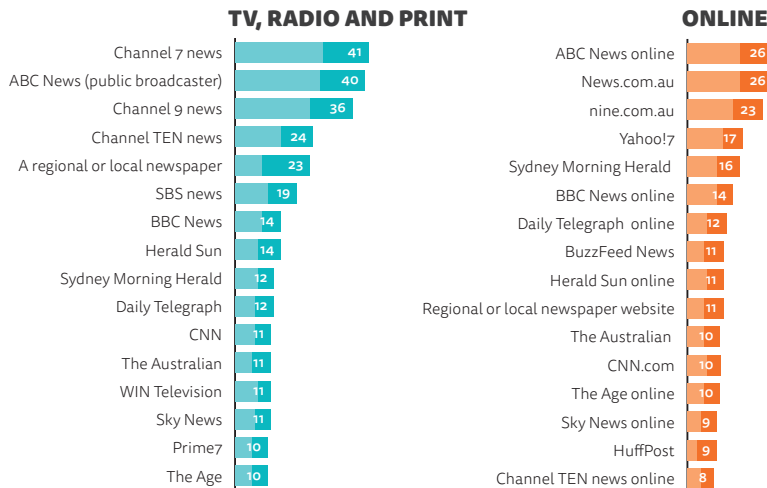
Caroline Fisher

News and Media Research Centre, University of Canberra

TOP BRANDS

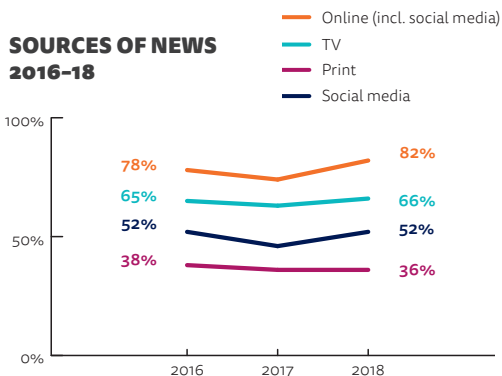
% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

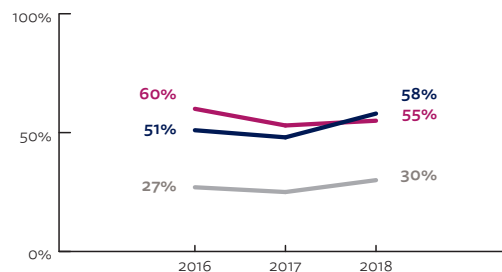


CHANGING MEDIA

The shift to online and mobile is being mirrored in news consumption. 58% of news consumers are using their smartphones to access news, overtaking computer and tablets for the first time. Two thirds (66%) continue to watch TV news.



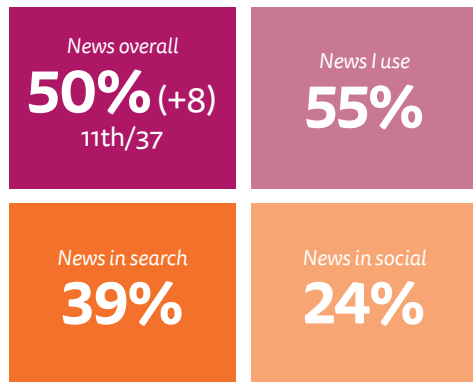
DEVICES FOR NEWS 2016-18



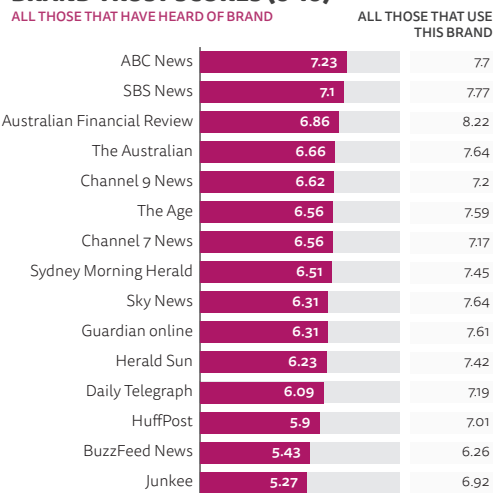
TRUST

There has been a significant increase in general trust in news from 42% in 2017 to 50%, but trust in social media for news is low at 24%. This possibly reflects a growing awareness of a distinction between quality journalism and 'fake news'.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



20% (+7)
(5th/37) pay for **ONLINE NEWS**

30% (+6)
(12th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	41% (+2)	68%
2	YouTube	20% (+5)	57%
3	Facebook Messenger	11% (+3)	47%
4	Twitter	10% (+2)	18%
5	WhatsApp	10% (+3)	22%
6	Instagram	9% (+5)	28%

39%
SHARE NEWS
via social or email



25%
COMMENT ON NEWS
via social or website



HONG KONG

Chinese money continues to exert influence in Hong Kong's news landscape as two prominent television broadcasters are the latest to come under the ownership of individuals and businesses that have substantive connections with Mainland China.

Shifts in advertising revenue continue to have large repercussions on the Hong Kong media landscape. Between 2013 and 2016, advertising revenue for TV and paid newspapers fell 13% and 32% respectively while online media increased 49%.¹¹⁹ Some brands have adjusted to the trend better than others. TVB continues to maintain its virtual monopoly on free TV news and has effectively expanded its presence online. Similarly, Apple Daily has an innovative multimedia motion news format that makes it the only established brand where usage of the online edition (39%) is higher than the print edition (26%).

However, even TVB and Apple Daily are suffering from declining revenues and profits. It is no surprise then that other legacy media institutions are facing even bigger challenges. For example, paid TV provider i-CABLE barely managed to stave off bankruptcy in 2017 as a group of investors injected new funds to maintain its operations, which helped save 2,000 jobs in the process. The presence of two minority investors from Mainland China in the group also raised some concerns on the increasing amount of Chinese money in Hong Kong's media industries and its potential impact on editorial independence and the broadcasting of news and opinion that is negative or critical towards China. The same concerns were raised again when it was later reported that TVB was owned by a Mainland Chinese tycoon through a complex web of cross holdings among different companies.

Recognising the challenges faced by the broadcasting sector, the government in February 2018 released a consultation



STATISTICS

Population	7.4m
Internet penetration	87%

paper to gather public views on its proposal to liberalise broadcasting laws and loosen restrictions on cross-media ownership, which were put in place originally in 1964 to prevent a single entity controlling different sectors of the media industry. If enacted, newspapers, advertising agencies, and other media companies could acquire TV licences and have their own stations, which the government hopes would lead to more innovation and investment in the sector.

With the exception of Yahoo! News (39%), almost all the popular online brands are digital versions of established media outlets. Online alternative news brands including *Bastille Post* and *Stand News* maintain their popularity by targeting niche audience tastes, such as soft news and politics, respectively.

Established in 2016, HK01.com operates an online news site and a weekly print newspaper. It is currently by far the largest online news brand in terms of number of journalists hired, reportedly in the 400–700 range, and has quickly established its reputation, appearing in the latest *DNR* for the first time (17%) and surpassing other more established brands.

Online alternative news brands finally gained some formal recognition as the government decided to allow journalists from online-only news outlets to obtain press credentials to attend government press conferences and media events. Nevertheless, financial viability is a perennial challenge due to the lack of revenue. In April 2017, Initium Media reportedly had to lay off a large number

of staff due to cash flow problems, while the English-language *Hong Kong Free Press* conducts a funding drive every year through crowdsourcing. Sources of funding for other brands are less transparent, however, and there is some speculation that Chinese money is also making its way into some of the online-only brands.

Radio Television Hong Kong (RTHK) ceased its digital radio transmissions in September 2017, which marked the end of the short-lived and unprofitable digital radio era in Hong Kong that at one point had four stations offering 18 digital channels. Whilst the decision was expected, most news and commentary focused on the public broadcaster's decision to end its 24-hour relay of the BBC World Service that had been broadcast since 1978 on its analogue channel, to make room for the state-run Mandarin China National Radio that was previously relayed through the digital channel. Earlier in the year, RTHK also replaced the broadcast of the Chinese government's English-language channel (CCTV-9) in favour of its flagship Chinese-language channel (CCTV-1). This means that none of the three RTHK TV channels currently have dedicated English programming despite the government's 'bilateral and trilingual' language policy that emphasises proficiency in English, Cantonese, and Mandarin.

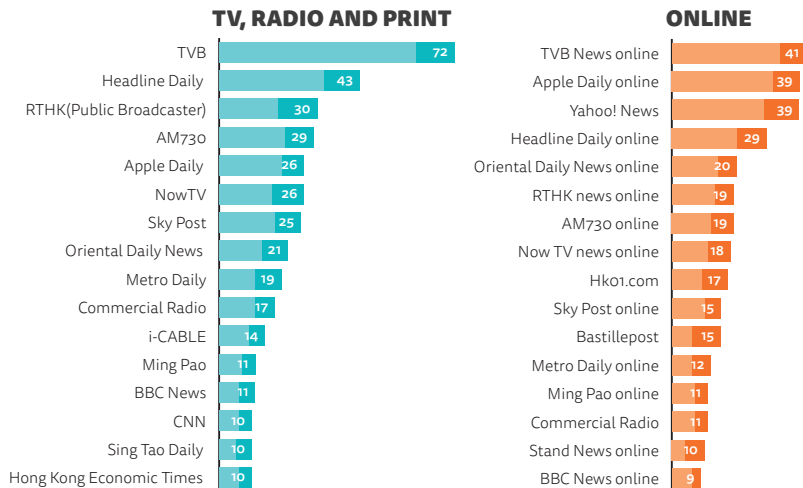
Michael Chan, Hsuan-Ting Chen,
and **Francis Lee**
Chinese University of Hong Kong

¹¹⁹ Commerce and Economic Development Bureau, HKSAR Government, 'Review of Television and Sound Broadcasting Regulatory Regimes' – Consultation Paper.

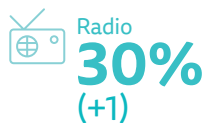
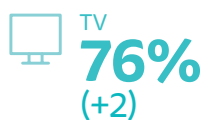
TOP BRANDS

% Weekly usage

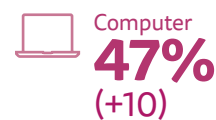
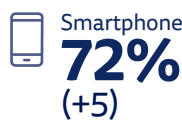
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



SOURCES OF NEWS



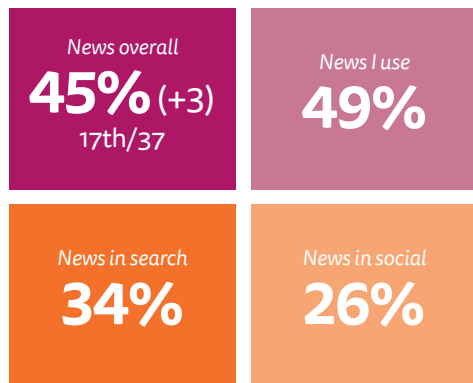
DEVICES FOR NEWS



TRUST

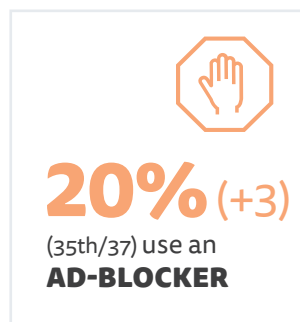
Trust in individual media outlets is neither surprisingly high nor low. The most popular online-only outlets such as HK01.com and Bastille Post enjoy low levels of trust when compared to other long-established media brands.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
RTHK	6.78	7.47
Now TV	6.7	7.27
Cable TV	6.63	7.33
Commercial Radio	6.51	7.2
Ming Pao	6.47	6.93
AM730	6.33	6.81
Yahoo! News	6.27	6.74
Headline Daily	6.19	6.71
TVB	6.15	6.42
Sing Tao Daily	6.14	6.96
Oriental Daily News	5.86	6.64
Stand News	5.63	6.56
Bastillepost	5.63	6.01
Apple Daily	5.6	6.33
HK01	5.6	6.18



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	56% (+2)	81%
2	WhatsApp	38% (-2)	83%
3	WeChat	15% (+1)	52%
4	Instagram	9% (+2)	37%
5	Facebook Messenger	8% (+2)	34%
6	Line	6% (+2)	23%



JAPAN

The Japanese media market is characterised by strong, high-circulation newspapers and by five national television networks, including licence fee-funded public broadcaster NHK. Online news is dominated by Yahoo!, which mainly aggregates other news sources but has started to produce more original content.

Japanese newspapers still sell over 40m copies each day, among the highest rates in the world, with around 0.75 copies per household. The largest print circulation remains the conservative *Yomiuri Shimbun*'s 8.56m, followed by 6.26m for the liberal *Asahi Shimbun*, but total circulation continues to fall by around 1m a year.¹²⁰

Japanese newspapers' digital shift is led by the economic daily *Nikkei* (*Nihon Keizai Shimbun*, or Japan Economic Daily), which purchased the *Financial Times* in 2015. For its growing 558,900 digital subscribers, the *Nikkei* recently changed its policy to publish exclusive stories online first. 'Evening Scoops' are now regularly sent to digital devices at 6pm every day, instead of in the small hours. This is a clear shift in strategy towards prioritising the interests of online readers.

Asahi Shimbun operates a metered payroll and has also been investing in new brands: Withnews is a youth-orientated website that aims to provide a different range of stories, a more visual style, and greater interaction with reporters. WebRonza provides expert articles by academics, analysts, business executives, and *Asahi*'s veteran journalists. Huffpost Japan is also affiliated with *Asahi*.

Another big national daily, *Mainichi Shimbun*, has launched an 'integrated digital reporting centre' focusing on digital-first publishing. *Yomiuri* keeps its print edition bundled with online subscription packages, one factor that may have helped the paper keep its headline 8m circulation.



STATISTICS

Population	127m
Internet penetration	93%

It is striking that while NHK and *Nikkei* are the two news brands with the highest trust levels in our survey, *Asahi* was the lowest of five major dailies including the very conservative *Sankei Shimbun*. In recent years, the liberal broadsheet has been criticised by politicians from both the ruling conservative Liberal Democratic Party and right-leaning media. Prime Minister Shinzo Abe wrote on Facebook about *Asahi*'s reaction to an alleged error: 'It's pitiful. A miserable excuse just like *Asahi*. It's all expected.' On a different occasion, another conservative Diet member, Yasushi Adachi, tweeted: '*Asahi*, you shall die', while right-leaning magazines publish headlines like 'We have to shut down *Asahi*'. Further analysis shows that *Asahi*'s weaker trust is partly a result of high levels of distrust from these vocal and partisan critics on the right. After this year's survey was conducted, *Asahi* published a series of exposés which rocked the government and slashed Prime Minister Abe's approval rating. The impact is not reflected in this year's survey.

Fact-checking arrived in Japan in 2017. A coalition of digital start-ups and media analysts, FactCheck Initiative Japan (FCJ), launched a project to verify assertions in the general election campaign in October. It is unusual in that it uses experts and citizens to check both politicians' remarks and media stories. The coalition has both liberal and conservative outlets on board. FCJ, funded by public donation, is run by journalists and academics.

Japan's top online news source, Yahoo! Japan, is increasing its original news content, alongside its news aggregation platform. Masayuki Takada, an investigative reporter-turned-academic, joined as advisory editor. It has been publishing stories about autism, has covered schools for ethnic minorities, and reported on bullying against a government employee with a developmental disorder. Meanwhile, online financial news service NewsPicks announced that it has 60,000 paying subscribers. A free aggregation app, SmartNews, has been downloaded 25m times, while the messaging service Line, which is dominant in Japan with 73m monthly active users, provides news stories through mobile phones.

Uniquely across all the countries in this report, Facebook (22%) in Japan is only the fourth most popular social network, behind YouTube (51%), Twitter (27%), and Line (27%). In terms of news, Japanese also prefer Twitter (12%) to Facebook (9%), partly because they often feel uncomfortable with using real names online. Local video-sharing site Niconico is also gaining popularity (+3) partly because it allows user comments to be overlaid directly on videos, creating a sense of a shared experience.

Yasuomi Sawa

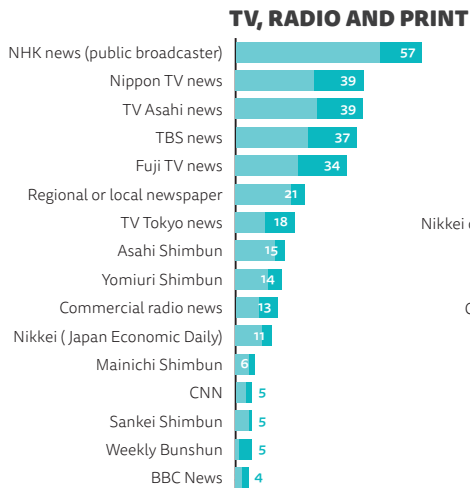
Journalist, Kyodo News and former Reuters Institute Journalist Fellow

¹²⁰ <http://www.pressnet.or.jp/english/data/circulation/circulation01.php>

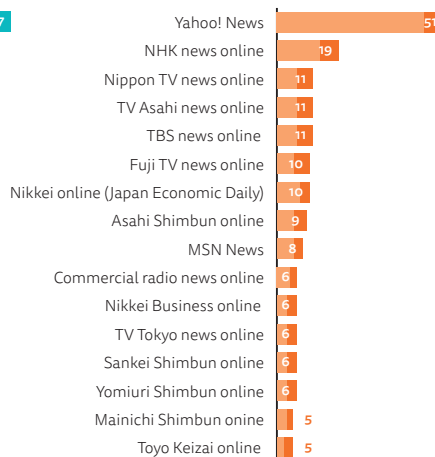
TOP BRANDS

% Weekly usage

- **Weekly use**
TV, radio & print
- **At least 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **At least 3 days per week**
online brands

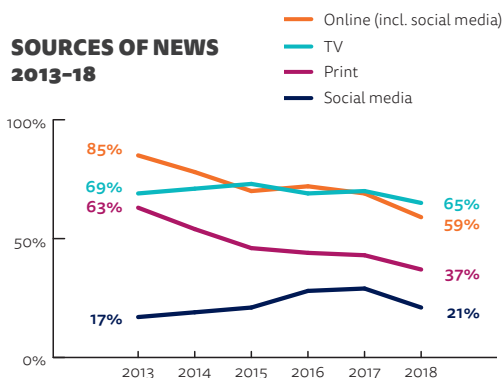


ONLINE

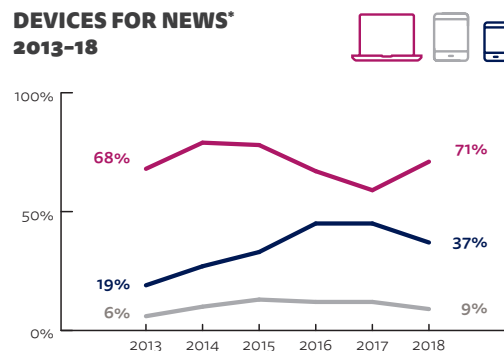


CHANGING MEDIA

News consumption is down across the board this year, with TV worst affected. Weekly reach for TV news has fallen by 4 points since 2013 while readers of print newspapers have dropped 26 points to 37%.



DEVICES FOR NEWS* 2013-18

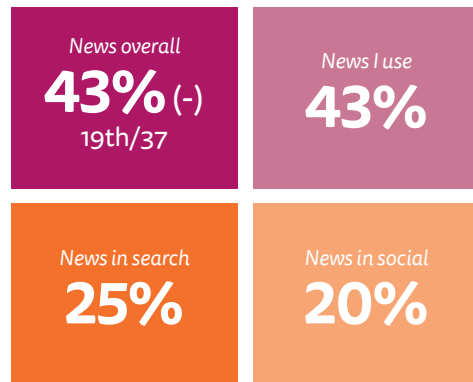


* 2018 computer data may be overstated - see methodology for more information

TRUST

Japanese have traditionally had high trust in authority, but a series of high-profile mistakes by news media have affected general trust (43%). Television brands and local newspapers tend to be most trusted while tabloid-style weekly magazines are least trusted.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
NHK news	6.23	6.73
Nikkei (Japan Economic Daily)	6.08	6.83
A Local Newspaper	5.87	6.45
Nippon TV (NTV) news	5.86	6.37
TBS news	5.78	6.31
Yomiuri Shimbun	5.76	6.45
TV Asahi news	5.7	6.26
Sankei Shimbun	5.68	6.51
Fuji TV news	5.64	6.24
Mainichi Shimbun	5.63	6.26
Asahi Shimbun	5.35	6.27
HuffPost Japan Edition	5.26	5.95
BuzzFeed Japan	5.15	5.76
Weekly Shincho	4.88	5.85
Weekly Bunshun	4.63	5.92

10% (-1)
(26th/37) pay for **ONLINE NEWS**

17% (+4)
(36th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	YouTube	19% (+2)	51%
2	Twitter	12% (-)	27%
3	Line	9% (-4)	27%
4	Facebook	9% (-)	22%
5	Niconico	4% (+3)	15%
6	Instagram	2% (-)	12%

13%

SHARE NEWS
via social or email



8%

COMMENT ON NEWS
via social or website



MALAYSIA

After decades of authoritarian rule by one coalition, the unexpected General Election outcome of 9 May has thrown up numerous possibilities – many positive – for the media environment in Malaysia.

Even before the latest political upheavals, the past year has seen major media organisations, mainly print and broadcasting, suffering substantial losses. Media Prima, Malaysia's biggest media conglomerate, reported a loss in 2017 – MYR669 million (approximately US \$172m).¹²¹

Media Prima owns all four of the free-to-air commercial television stations in Malaysia and two national dailies, the English-language *New Straits Times* and the Malay language *Berita Harian*. Circulations of these once-popular newspapers have continued to fall, for two main reasons.

The first is politics. They were openly aligned and strongly supportive of the former Prime Minister, Najib Razak, at a time when he was embroiled in one major financial scandal after another. This made Media Prima's media properties increasingly unpopular among Malaysians. Just a little over a week after the BN regime lost the elections, Media Prima's group chairman resigned, following in the footsteps of directors from other media companies.

The second cause of newspaper woe is digital. The rising popularity and increasing availability of digital online news portals and social media have seen the migration of traditional audiences to the web. The number of people using online news sources increased by 3 points, and those using social media for news increased by 5. In contrast those relying on print fell by 4.

Smartphones are now the most popular way for people to access digital news. Indeed, while it has not been clearly established yet, it appears that social media played a key role in putting across the messages of the then PH opposition during the short election campaign period.



STATISTICS

Population	32m
Internet penetration	78%

There still appears a reluctance on the part of consumers to pay for online news, a problem facing organisations like the news portal Malaysiakini and The Malaysian Insight, a site which suddenly suspended operations but plans to start a subscription service.

Trust remains an important issue. The recently defeated Barisan Nasional government was affected by the scandals and alleged cover-ups and the media's ability to report these issues fairly is also in question. Less than a third (30%) of those polled have trust in news overall.

There appears to be greater trust in what are perceived as *international* media as opposed to local, with Yahoo! News being the most trusted brand. This has much to do with the structures and patterns of media ownership and control. There are some brands that buck this trend. Malaysiakini (44% reach) has maintained its reputation for providing independent news and continues to retain the trust of many Malaysians, especially those tired of propaganda.

'Fake news' as an issue for the media shifted very quickly, over just a couple of months, from being the subject of a comment by Najib to becoming an Act of Parliament. On 2 April the anti-'fake news' Law (AFNL) was passed just in time for the general election. The law was hastily drawn up with no feedback from opposition parties, media professionals, academics, or civil society. It was rushed through parliament with only five opposition MPs being allowed to voice their opinions. It consists of a vague, general definition of what constitutes 'fake news' and yet allows for tough penalties – a

maximum jail term of six years and a fine of MYR500,000 (approximately US \$128,000).

No one was under any illusions – not even the then government – that the reason for the law wasn't essentially political. As media academic Gayathry Venkiteswaran has put it:

*'For most observers, the obvious reason behind this rushed law is to keep the scandalous 1Malaysia Development Berhad (1MDB) wealth fund and other financial misappropriations out of the electorate's focus. This is a punitive law that fails to provide any clarity on the meaning or parameters of 'fake news', but criminalises a wide array of speech online and offline.'*¹²²

But all this seems to have changed since 9 May. The new Pakatan Harapan (PH) government has promised to review, if not remove, the AFNL, together with other coercive laws. It has already established high-level committees headed by respected individuals to spearhead much-needed reforms. It may be early days yet, but the actions of the new administration do point towards a more open environment and a more vocal media.

Zaharom Nain

Centre for the Study of Communications and Culture, University of Nottingham Malaysia Campus

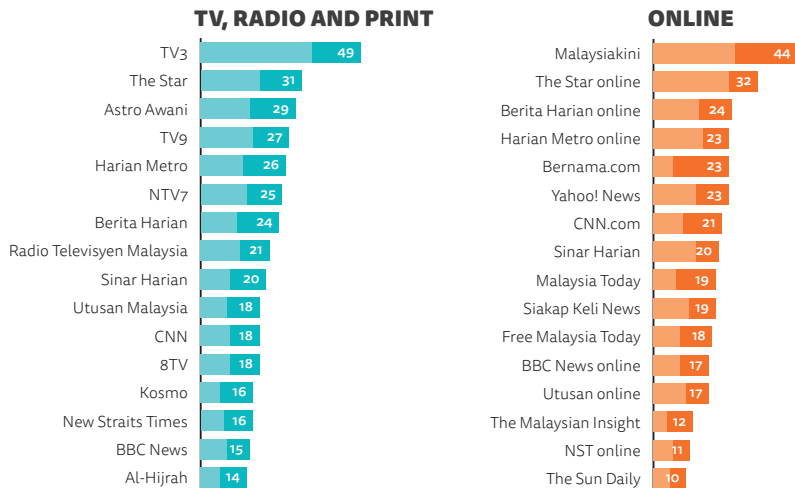
¹²¹ <https://www.thestar.com.my/business/business-news/2018/02/23/media-prima-posts-quarterly-net-loss-of-rm3782mil>

¹²² Gayathry Venkiteswaran, 'All the news that's fit to fake', New Mandala, 2018: <http://www.newmandala.org/news-thats-fit-fake>

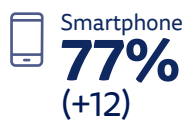
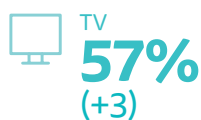
TOP BRANDS

% Weekly usage

- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



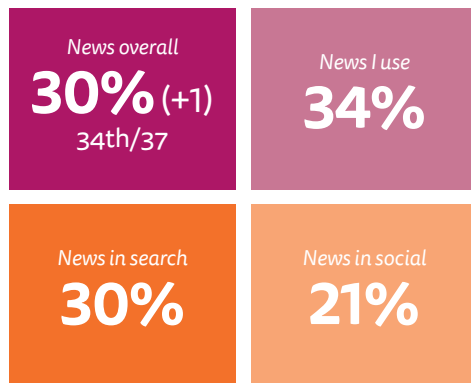
SOURCES OF NEWS



TRUST

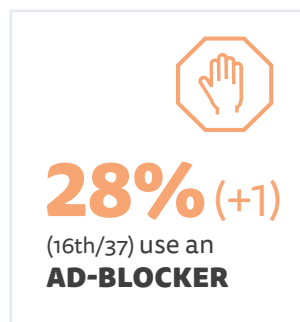
Less than a third of our Malaysian sample agree that they trust the news (30%) most of the time. This relates to perceptions that independence is often compromised by powerful business or political interests.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
Yahoo! News	6.12	6.61
Astro Awani	6.05	7.03
The Star	6.03	6.29
Malaysiakini	6.02	6.57
NTV7	5.79	6.56
Malaysia Today	5.77	6.34
Borneo Post	5.75	6.59
Televisyen Malaysia	5.48	6.5
Harian Metro	5.4	6.37
Siakap Keli News	5.17	6.14
TV3 News	4.93	5.71
Utusan Malaysia	4.84	6.09



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	64% (+6)	82%
2	WhatsApp	54% (+3)	82%
3	YouTube	33% (+7)	72%
4	Instagram	17% (+4)	45%
5	Twitter	13% (+3)	25%
6	Facebook Messenger	12% (+1)	36%



SINGAPORE

Digital news sites and social media serve as Singapore's primary sources of news, with three-quarters of the population accessing news through smartphones. Trust in the news slightly increased compared with last year, as media and government initiatives to combat 'fake news' dominated the headlines.

Almost half of our online sample (47%) say they trust the news in Singapore – up 5 percentage points on last year. Higher trust may partly be related to the recent announcement by the Singapore government that it was going to tackle the problem of 'fake news'. In January 2018, the government formed a select committee to address 'deliberate falsehoods online', citing the rise in 'fake news' across many countries and Singapore's vulnerability given its high internet penetration rates and its population's cultural and racial diversity. The committee invited the public to submit written representations and also spoke with experts during televised hearings in March 2018.

The government already has an extensive system of media regulation. The Newspaper and Printing Presses Act governs the licensing of newspaper companies while the Broadcasting Act regulates the licensing of broadcasting services as well as internet content providers, including online news sites. Starting in 2013, the government introduced a new framework that required individual licensing for online news sites that publish regular articles on Singapore news and current affairs, and have large numbers of monthly visitors. Licensed sites are required to remove content that is in breach of content standards, such as pornographic, extremist, or racially insensitive content, within 24 hours and post a performance bond of SGD 50,000 (US \$38,000), similar to the bond requirement for television broadcasters.¹²³

News media organisations in Singapore have also started their own initiatives to address 'fake news', inviting experts to write



commentaries, actively participating in conferences, and publishing opinion pieces on the issue. *The Straits Times*, the country's paper of record, experienced 'fake news' first-hand, after a photoshopped version of its Facebook post about the King of Thailand went viral in December 2016.¹²⁴

The Straits Times is published by the Singapore Press Holdings (SPH), one of the two main legacy media organisations in Singapore. SPH also publishes most of Singapore's local newspapers, including Chinese-language *Lianhe Zaobao*, Malay-language *Berita Harian*, and Tamil-language *Tamil Murasu*. *The Straits Times'* average daily combined print and digital circulation decreased from 393,300 in 2016 to 383,600 in 2017 mainly due to the decrease in print circulation.¹²⁵ Digital circulation actually increased from 116,200 in 2016 to 120,400 in 2017. However, SPH laid off 130 employees in October 2017. Our data show weekly print readership decreasing from 53% in 2017 to 43% in 2018 as readership shifts further online.

While Singaporeans also get their news from international news organisations, SPH and the news brands owned by MediaCorp remain the two key local players. Among traditional brands, *The Straits Times* is the most frequently used (51%), followed by Channel News Asia (CNA, 41%), MediaCorp's round-the-clock news TV channel. The company also publishes *Today*, which started as a free paper in November 2000 but became fully digital in October 2017. During its peak, *Today* reached a readership of 730,000 in 2012.

STATISTICS

Population	5.8m
Internet penetration	84%

Aside from *Today* ceasing its print publication, the local news media scene also saw the closure of The Middle Ground (TMG) in November 2017. Founded in 2015, this alternative news site provided news reports and political commentary. It heavily relied on donations and closed due to financial difficulties.

Online, CNA's website is the most frequently used (46%) followed by *The Straits Times'* website (45%). News aggregator Yahoo! News comes third (36%). *Today* is ranked fourth (26%) followed by the alternative site Mothership (23%). BBC News online is ranked sixth (20%) followed by STOMP (19%), a user-generated content site run by *The Straits Times*.

Among social media platforms, WhatsApp gained more ground, with 42% saying they use it for news, up from 38% last year. Facebook is still a dominant player, but it decreased from 55% last year to 52% this year. The use of WhatsApp, a closed social media and messaging app, is particularly noteworthy amid the discussions on 'fake news', as 'fake news' being exchanged among friends is harder to track than that being posted on more public apps such as Facebook.

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¹²³ <https://www.gov.sg/factually/content/what-is-the-licensing-framework-for-online-news-sites-all-about>

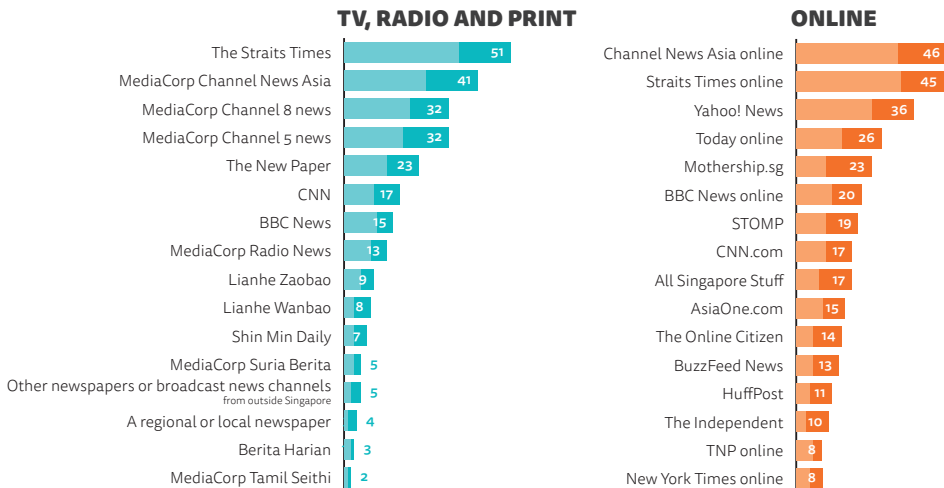
¹²⁴ <http://www.theindependent.sg/st-investigating-facebook-post-of-president-tan-inviting-new-thai-king-to-eat-kfc>

¹²⁵ <http://sph.listedcompany.com/misc/SPH-AR2017.pdf>

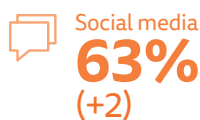
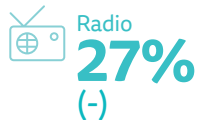
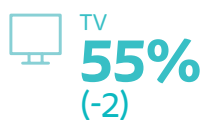
TOP BRANDS

% Weekly usage

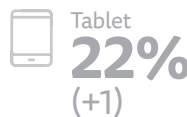
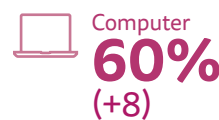
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



SOURCES OF NEWS



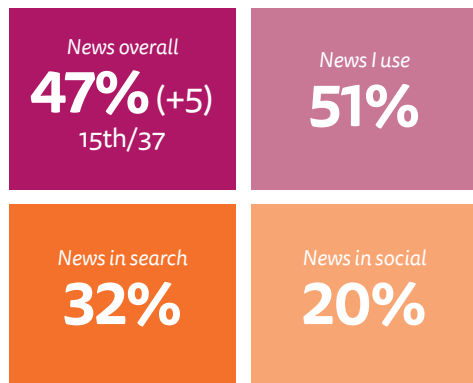
DEVICES FOR NEWS



TRUST

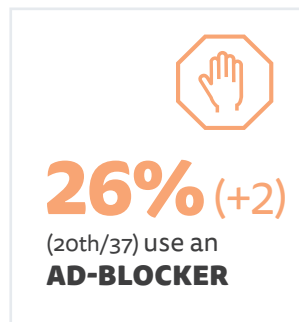
Almost half of our online sample (47%) say they trust the news in Singapore. By contrast, only a fifth (20%) say they trust the news in social media, even as its use as a news source has grown by 2 percentage points (63%).

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)

Brand	ALL THOSE THAT HAVE HEARD OF BRAND	ALL THOSE THAT USE THIS BRAND
BBC News	7.18	7.61
MediaCorp Channel News Asia	7.18	7.59
MediaCorp Channel 5 news	7.03	7.49
The Straits times	7.01	7.27
CNN	6.97	7.41
MediaCorp Channel 8 news	6.95	7.43
MediaCorp Radio News	6.82	7.55
Lianhe Zaobao	6.49	7.26
Yahoo! News	6.26	6.75
The New Paper	6.22	6.9
Shin Min Daily	5.97	6.76
HuffPost	5.93	6.54
Mothership.sg	5.24	5.76
The Online Citizen	5.16	5.96
All Singapore Stuff	5.1	5.66



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	52% (-3)	77%
2	WhatsApp	42% (+4)	86%
3	YouTube	25% (+1)	74%
4	Instagram	11% (+2)	48%
5	Facebook Messenger	9% (+1)	38%
6	LinkedIn	6% (+2)	24%



SOUTH KOREA

Digital technology has significantly disrupted the media landscape in South Korea, as home-grown portals have become the leading destination for news, eroding the business models of traditional media companies.

South Korea is one of the countries where online news consumption (84%) surpasses TV news (74%) with online news access largely controlled by giant domestic platforms such as Naver (65%) and Daum (38%), which function both as onsite news aggregators and search engines as well as providing email and shopping services. Daum also operates the leading social network and chat apps in South Korea (Kakao Story and Kakao Talk) while Naver owns Band and created the popular messaging app Line.

But these powerful platforms are coming under increasing pressure to do more to help the news industry. Both Naver and Daum operate differently to Facebook in that they pay publishers tens of millions of dollars each year for access to content¹²⁶ while restricting platform access to 'approved' publishers. Eligibility is decided by the Committee for the Evaluation of News Partnership, which is made up of representatives from industry and media associations.

In 2017, Naver announced that, in addition to these content fees, they would start paying a share of advertising revenues that appear around news content. They also said that they would create a readers' fund called PLUS (Press Linked User Support) so that Naver users could help fund individual journalists or news organisations of their choice. Naver has also set up a series of joint ventures with news organisations such as mobile websites and apps around services such as job search, travel, movie, finance, education, and marriage. Meanwhile, Kakao (linked to Daum) launched a 'Storyfunding' service by which users can donate money to citizen journalists, civic organisations, and investigative reporters.



STATISTICS

Population	51m
Internet penetration	93%

The way in which these platforms recommend news on their portals (using human editors) has been questioned over possible bias and occasional manipulation. In an international conference hosted by Korea Press Foundation, Naver said their recommendation systems would soon completely rely on computerised algorithms. Naver also went on to promise to open up their news algorithms to public scrutiny. Meanwhile, the Korea Press Foundation continues to develop an 'independent' public news recommendation algorithm.

Among the social platforms, YouTube (+7 percentage points) is becoming more popular, while the growth of Facebook is stagnant. Three-quarters (78%) reported that they watched online news videos in the last week, while more than half (58%) said that they listened to podcasts at least once a month. Blurring the boundaries between professional and amateur journalism, podcasts are gaining an increasing audience in South Korea. Kakao Talk, the most popular messaging app, also serves as a channel through which news and political information are shared and spread among its users (39%).

The rise of social platforms has prompted concerns about disinformation and 'fake news'. Trust in news overall (25%) was lowest among 37 countries, and trust in news on social media (19%) was even lower. South Korean audiences are equally concerned about poor journalism (60%) and fabricated stories (61%). They also feel that media companies (79%), platforms (77%), and government (73%) should do more to separate what is real and what is fake on the internet.

The Korea Communications Commission (KCC) announced its willingness to take regulatory action against 'fake news', but has done little so far because of concerns that this could curtail freedom of speech and expression. Enhanced transparency of information sources, fact-check journalism, and digital information literacy are considered more realistic and desirable approaches.

When it comes to individual brands, top broadcast channels tend to be more trusted than top newspaper brands. Among broadcast channels, cable channels such as JTBC and YTN tend to be more trusted than public broadcasting services (KBS and MBC).

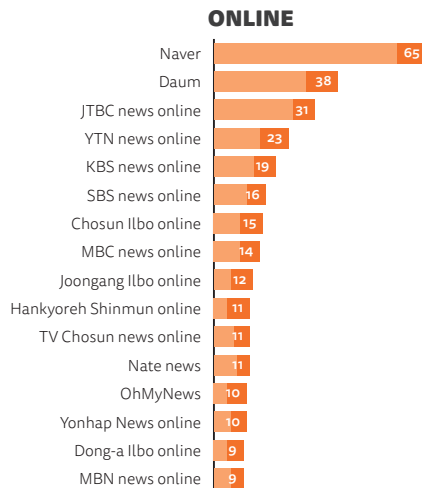
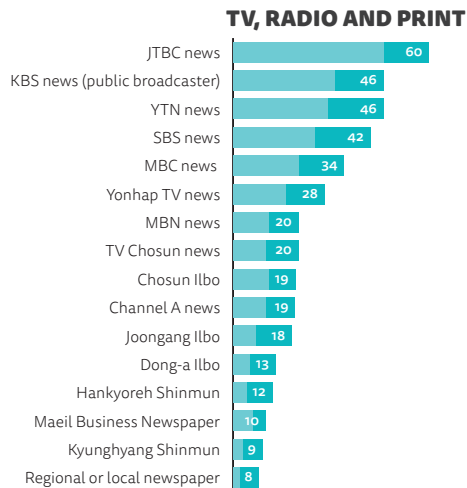
The policies and measures to strengthen independence and impartiality of public broadcasting services have been actively discussed since 2017. Public broadcasting services are encountering digital challenges, because fewer younger people watch TV news. Newspapers are still struggling to adapt to the digital environment. Amid plummeting newspaper subscriptions and ad revenues, they have yet to find a way toward a sustainable future. Digital subscription strategy is difficult to implement in South Korea due to widely available free news on portal sites and social platforms, which also take the majority of digital ad revenues. Only around one in ten (11%) say they have paid for any online news in the last year. Although it may be impossible without institutional endorsement and readers' participation, interest in not-for-profit journalism as an alternative model is on the rise.

¹²⁶ <https://www.theatlantic.com/technology/archive/2017/12/naver-news-ad-revenue/547412>

TOP BRANDS

% Weekly usage

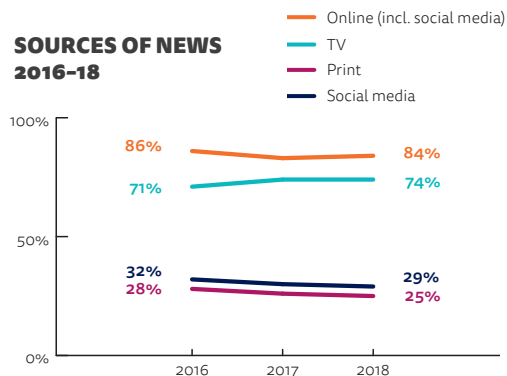
- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



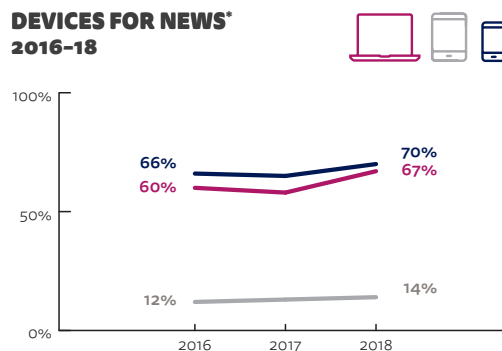
CHANGING MEDIA

Koreans have been some of the fastest to adopt new mobile technologies in our survey, with 70% saying they use smartphones for news. This is not surprising given that Samsung is one of the country's biggest and most successful companies.

SOURCES OF NEWS 2016-18



DEVICES FOR NEWS* 2016-18



* 2018 computer data may be overstated - see methodology for more information

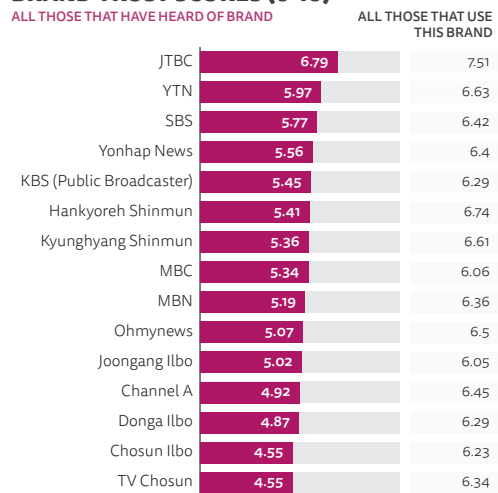
TRUST

Trust in news is amongst the lowest in our survey at 25%, but almost half (46%) said that they neither trust nor distrust news. These results imply that a majority of Korean audiences are uncertain about the quality of news overall.

DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



11% (-1)
(20th/37) pay for **ONLINE NEWS**

13% (+1)
(37th/37) use an **AD-BLOCKER**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Kakao Talk*	39% (-)	80%
2	YouTube	31% (+3)	64%
3	Facebook	25% (-3)	50%
4	Kakao Story*	12% (-5)	36%
5	Twitter	8% (-1)	21%
6	Band	7% (-2)	27%

29%
SHARE NEWS
via social or email



19%
COMMENT ON NEWS
via social or website



* These figures were based on a resurvey of 1006 people in April 2018

TAIWAN

Disinformation (or 'fake news') has spread across the Taiwan Strait from China over the last year. And Taiwan's own competitive news media, heavily influenced by social media, have helped it spread.

In the past year, Taiwanese media have extensively covered stories about the People's Liberation Army (PLA) of China sending aircraft and ships to patrol Taiwan. These stories were sparked by social media accounts run by the Chinese military, which released pictures and videos about the PLA operation that were widely shared within Taiwan. Before long, seven 24-hour news channels were delivering breaking news about the Chinese operations every hour, using the photos and videos made by the PLA – but without having verified whether or not they were true. According to a later strategic analysis, the PLA has been trying to manipulate Taiwan public opinion by using official and unofficial channels to spread 'fake news', even though it is unlikely to wage a real war against Taiwan.¹²⁷

As shown in our survey, about three-quarters of Taiwanese use social media for any purpose (primarily Facebook and Line) and more than half (56%) use them for news. However, here as elsewhere, social media platforms shoulder few, if any, social responsibilities.

Since deregulation in the 1990s, Taiwanese media has been very competitive, with the aforementioned seven 24-hour news cable channels, plus five terrestrial television stations, four newspaper groups, as well as emerging digital-born news operations. To survive in the digital market, many have relied increasingly on sensationalist content, and have adopted stories from social media with little regard for facts or trust.

Popular news websites dramatised the PLA's military operations. For example, Apple Daily presented the operations as a hyper-real film, creating animations and composite photos in which the leaders of



Taiwan and China confronted each other. This approach helped Apple Daily online attract a large number of page views but, despite this, its parent group has been struggling to drive revenue and had to cut staff in July 2017. As elsewhere, most digital advertising revenue in Taiwan goes to Facebook and Google and few sites charge readers for news.

The public broadcaster, PTS, is the most trusted news brand according to our survey, though is used by relatively few people (15% via TV and 10% online). Since it is subsidised by the state, it is under less commercial pressure and largely abides by professional values, including verifying photographs published by the PLA. Commercial operators, by contrast, like TVBS (50% offline, 26% online) and Apple Daily (38%/31%) are more popular but less trusted. Some commercial print media are polarised, with the *China Times*, for example, adopting a pro-China editorial policy as the influence of powerful Taiwanese tycoons with business interests in China grows.

To tackle Taiwan's media problems, low trust in commercial news companies, and the weakness of public media, several actions have been taken. The first has been to establish fact-checking mechanisms. Some politicians considered 'fake news' to be a danger to national security and proposed legislation, though this was abandoned because of widespread concern over curbing press freedom. Instead, the government set up a 'rumour rebuttal' service which runs on its agencies' websites. Non-governmental organisations have also set up fact-checking

STATISTICS

Population	23m
Internet penetration	88%

projects, and an independent third-party verification mechanism was set up in April 2018.

The second action is to strengthen public media, something campaigners have long called for. The culture minister has promised greater support for public media, and for its part, PTS is running an 'omnipresence' project to distribute its content in more places. It has even been suggested that as a tactic to counter the negative effects of social media on journalism – loss of ad revenues, imposition of censorship, selling of users' data to advertisers and political parties – PTS should develop into a 'public information platform' of its own, as an alternative to existing unaccountable social media.

Independent media are an important part of the media scene in Taiwan with digital-born sites like Storm Media (19%) and New Talk (10%), founded by well regarded journalists, attracting dedicated audiences online. The Reporter (3%) is a non-profit news organisation, dedicated to investigative journalism.

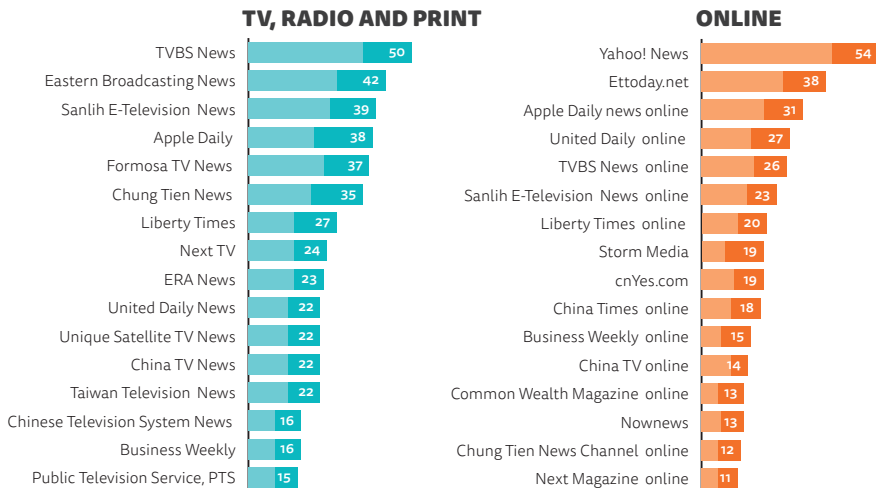
Lihyun Lin
National Taiwan University

¹²⁷ For the discussions of PLA's warfare against Taiwan, see Ying Yu Lin, 'China's Hybrid Warfare and Taiwan', *The Diplomat: Know the Asia-Pacific*, 13 Jan. 2018: <https://thediplomat.com/2018/01/chinas-hybrid-warfare-and-taiwan/>; J. J. Kung, 'Invisible Black Hands: Pan Blue Groups are Attacked by Contents from China', *Business Today*, 27 Mar. 2018.

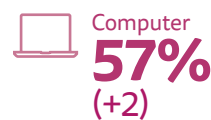
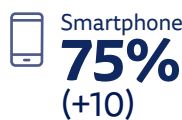
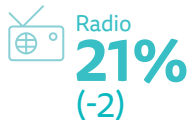
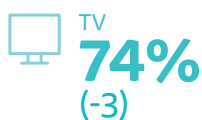
TOP BRANDS

% Weekly usage

- **Weekly use**
TV, radio & print
- **More than 3 days per week**
TV, radio & print
- **Weekly use**
online brands
- **More than 3 days per week**
online brands



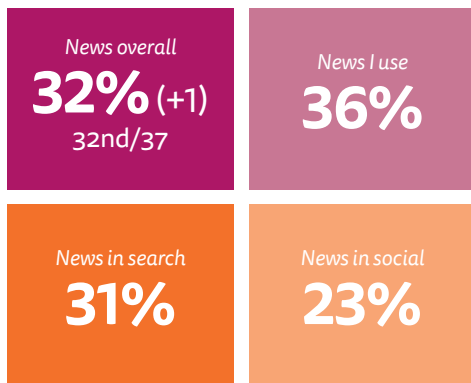
SOURCES OF NEWS



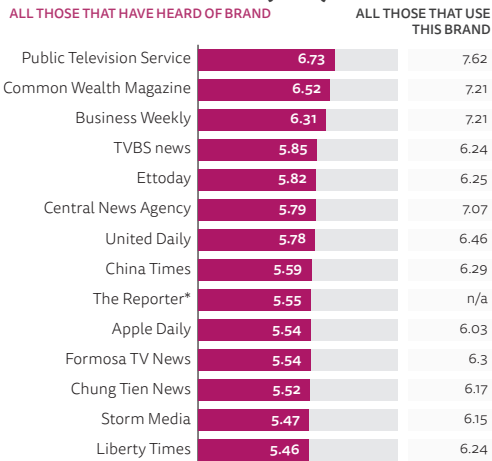
TRUST

Flooded with misinformation in social media and via mainstream media, Taiwanese people have low trust in the news they use. Yet more and more Taiwanese are willing to pay for the news they read.

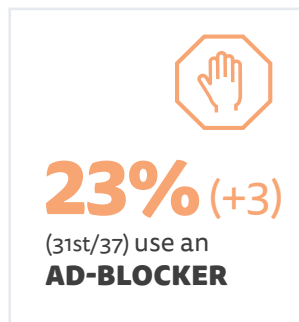
DIFFERENT TYPES OF TRUST



BRAND TRUST SCORES (0-10)



* Note: No figure for users of The Reporter (did not meet minimum 50 threshold)



TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For news	All
1	Facebook	56% (+1)	74%
2	Line	53% (+8)	73%
3	YouTube	38% (+2)	73%
4	PTT (bulletin board)	17% (+6)	29%
5	Facebook Messenger	8% (+2)	35%
6	Instagram	7% (+4)	27%





Section 4

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.



OTHER RELEVANT SURVEYS, ESSAYS AND REPORTS

Marty Baron, Executive Editor, Washington Post 'When a President Wages War on a Press at Work', Reuters Memorial lecture, Feb. 2018

<https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2018-02/Marty%20Baron%20Reuters%20Memorial%20Lecture%2016th%20Feb%202018.pdf>

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<https://www.ofcom.org.uk/research-and-data/multi-sector-research/cmr/cmr-2017>

Ofcom, *International Communications Market Report* (Dec. 2017):

https://www.ofcom.org.uk/__data/assets/pdf_file/0032/108896/icmr-2017.pdf

Pew Research Center's Project for Excellence in Journalism, *The State of the News Media* (2018):

<http://stateofthedia.org>

OTHER RELEVANT DIGITAL NEWS PROJECT PUBLICATIONS

Joy Jenkins, and Rasmus Nielsen, *The Digital Transition of Local News* (April 2018)

Annika Sehl, Alessio Cornia, *Public Service News and Social Media* (Mar. 2018)

Lucy Küng, *Going Digital: A Roadmap for Organisational Disruption* (Nov. 2017)

Kevin Anderson, *Beyond the Article: Frontiers of Editorial and Commercial Innovation* (Feb. 2017)

Lucas Graves, *The Rise of Fact-Checking Sites in Europe* (Nov. 2016)

Antonis Kalogeropoulos, Federica Cherubini, and Nic Newman, *The Future of Online Video* (June 2016)

Nic Newman, *Media Journalism and Technology Predictions* (Jan. 2018)

Tom Nicholls, *Digital-Born News Media in Europe* (Dec. 2017)

Annika Sehl, *Developing Digital News in Public Service Media* (Mar. 2017)

Jason Vir, Andrew Dodds (Kantar Media), *Brand and Trust in a Fragmented News Environment* (Oct. 2016)

Zillah Watson, *VR for News: The New Reality?* (Apr. 2017)



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