UNIVERSITY OF OXFORD

REUTERS INSTITUTE for the STUDY of JOURNALISM

REUTERS INSTITUTE DIGITAL NEWS REPORT

2013

Reuters Institute Digital News Report 2013

Tracking the Future of News

Edited by Nic Newman and David A. L. Levy

Supported by

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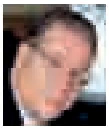
Introduction



David A. L. Levy, Director, Reuters Institute

This is the second in what we hope will be an annual series of reports that tracks the transition of the news industry towards an increasingly digital and multi-platform future. This year's report provides compelling evidence about the growing number of ways of consuming news and, in particular, the speeding up of the mobile and tablet revolution. It also documents the ways in which people are paying for news, the growing number of locations where they access the news, and brings new data about the trust and credibility of different news sources as well as attitudes to partial or impartial news.

But there are many other fascinating insights that have emerged from our unique survey of the news habits within nine countries. We have expanded our focus to include Japan, Brazil,[1] Italy, and Spain – in addition to the five countries (US, UK, France, Germany, and Denmark) that provided the basis of last year's survey and we've asked more questions in all countries on the key issues.

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

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

To that end we have also taken more effort to open up all of the data this year. A new website (www.digitalnewsreport.org) contains slidepacks, charts, and raw data tables, along with a license that encourages reuse. The website – which is optimised for mobile and tablet devices – will also carry links to non-English-language versions of the report. Over time, if we can secure the necessary long term funding, we believe this will build into an invaluable resource for academics and news organisations to explain the past as well as the future. A description of the methodology is available along with the complete questionnaire.

Making all this possible, we are hugely grateful to our sponsors this year, Google, BBC Global News, Ofcom, France Télévisions, and Newsworks, as well as the Hans Bredow Institute and Roskilde University.

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

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

Methodology

This study has been commissioned by the Reuters Institute to understand how news is being consumed in a range of countries. This research was conducted by YouGov using an online questionnaire at the end of January/beginning of February 2013.

- The data was weighted to targets set on age and gender, region, newspaper readership, and social grade to reflect the total population of each country. The sample is reflective of the population that has access to the internet.
- As this survey deals with news consumption, we filtered out anyone who said that they had not consumed any news in the past month in order to ensure that irrelevant responses didn't adversely affect date quality. This category was between 2% and 4% in most countries but as high as 9% in the UK.
- A comprehensive online questionnaire was designed to capture all aspects of news consumption.
- Core questions were asked in France, Germany, Denmark, Spain, Italy, Japan, Brazil, and the US, as well as the UK, to a nationally representative audience to provide an international comparison.

Country	Starting sample	Non-news users	Final sample	Total population**	Internet penetration
UK	2308	9%	2078	63,047,162	84%
Germany	1099	3%	1062	81,305,856	83%
Spain	1016	4%	979	47,042,984	67%
Italy	1003	4%	965	61,261,254	58%
France	1016	4%	973	65,630,692	80%
Denmark	1024	2%	1007	5,543,453	90%
US	2170	7%	2028	313,847,465	78%
Brazil*	1003	2%	985	193,946,886	46%
Japan	1004	2%	978	127,368,088	80%

*Please note that Brazil is representative of an urban population rather than a national population; as such the internet penetration is likely to be higher than stated above, which must be taken into consideration when interpreting results.
**Source: Internet World Stats www.internetworldstats.com population estimate 2012.

This is an online survey – and as such the results will under-represent the consumption habits of people who are not online (typically older, less affluent, and with limited formal education). Where relevant, we have tried to make this clear within the text. Going forward, these issues will become less of a factor as online penetration grows. In any case, the core purpose of this survey is not to deliver absolute numbers, but rather to track the activities and changes within the digital space – as well as gaining understanding about how offline media and online media are used together.

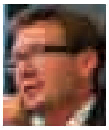
Authorship and Research Acknowledgements

Dr David A. L. Levy is Director of the Reuters Institute for the Study of Journalism, a Fellow of Green Templeton College, and an expert in media policy and regulation. He previously worked at the BBC both as a news and current affairs producer, reporter, and editor, and later as Controller Public Policy. He is the author of *Europe's Digital Revolution: Broadcasting Regulation, the EU and the Nation State* (Routledge 1999/2001), and joint editor with Tim Gardam of *The Price of Plurality* (RISJ/Ofcom 2008), with Rasmus Kleis Nielsen of *The Changing Business of Journalism and its Implications for Democracy* (RISJ, 2010) and with Robert G. Picard of *Is there a Better Structure for News Providers? The Potential in Charitable and Trust Ownership* (RISJ, 2011). He recently co-authored *The Public Appetite for Foreign News on TV and Online* (RISJ, 2013).

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

Additional expert analysis and interpretation of the survey data was provided by the team at YouGov, in particular, Shaun Austin, Angharad Houlden, Ilana Tyler-Rubinstein and Bernadeta Wilk.

Executive Summary and Key Findings



Nic Newman

News is becoming more mobile, more social, and more real-time. This year's survey reveals continuing shifts in how, when, and where people access the news, with digital patterns becoming more entrenched – particularly amongst the younger half of the population. Audiences increasingly want news on any device, in any format, and at any time of day.

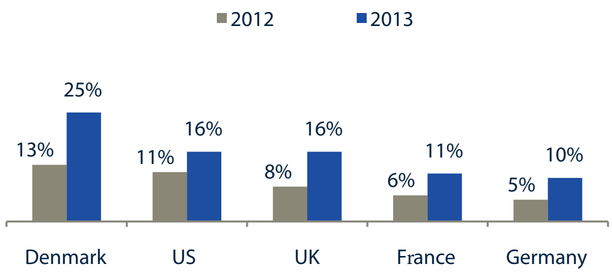
But our survey reveals that the multi-platform and digital revolution is not proceeding at an even pace in all countries. What happens in the US does not necessary follow automatically in Europe or elsewhere. Geography, culture, and government policy also play their part, with Germany and France still showing strong allegiance to traditional forms of media. We also see marked differences in 'participatory cultures', with very different rates of take up in social media, commenting, and voting across our surveyed countries.

For traditional brands – and especially newspapers – these changes bring ever-greater competition and more disruption to business models. But this year's survey offers some signs of hope for those investing in original news content. More people say they've paid for digital news in the past 10 months and we have data for the first time about the types and frequency of digital payment. Traditional brands continue to attract the largest online audiences and we find that trust in news brands remains uniquely valued by young and old. We lay out our data on subsequent pages and in full on our website, but first here is a summary of our key findings.

Rapid Growth in Both Mobile and Tablet Use for News

Tablet usage has doubled in the 10 months since the last survey in those countries covered in both 2012 and 2013. Weekly news use has risen from 8% to 16% of our UK sample and from 13% to 25% in Denmark.[2]

Percent accessing news via tablet by country



Q8a/Q8b: Which, if any, of the following devices have you used to access news in the last week?
Base: UK (n=2078) US (n=2028) Germany (n=1062) France (n=973) Denmark (n=1007)

Mobile usage is also up substantially. In many countries smartphone users are now in the majority[3] and most of them use these devices to access news every week. Denmark leads the way with 43% weekly news usage from a smartphone. Germany lags with 22%.

Trend to Multi-Platform Consumption

While the computer remains the primary device for accessing digital news, the key underlying trend is about growth in access from multiple devices. One-third of our entire global sample now gets news on at least two devices and 9% use more than three.

[2]These figures are not exactly comparable because we routed the questions slightly differently last year. They are however consistent with other data showing a sharp increase in news traffic from tablets.
[3]Ofcom Technology tracker Oct.–Dec. 2012 shows 55% smartphone ownership in the UK. A Pew Internet Project survey from Aug.–Sept. 2012 found 45% of US adults owned a smartphone (66% among 18–29 year olds).

This is important because, along with other researchers,[4] we find that as people acquire more devices they consume more news in aggregate (time spent) – but also access news more often throughout the day.[5]

Frequency of access grows with devices (all countries)

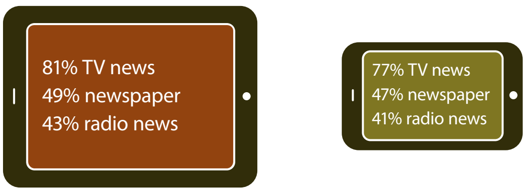
Device	Several times a day
ALL News users	62%
Computer	68%
Smartphone	73%
Tablet	75%
Tablet and smartphone	86%
All three	88%

Q1b: Typically, how often do you access news (in any way)?
Base: All markets (n=11004)

Some devices are used more heavily for news than others. 85% of computer users say they access news on that device each week, compared with 63% of smartphone users, 60% of tablet users, 54% of smart TV users, and only 17% for the e-reader.

But multi-platform is not just about digital news. Across all of our countries, an average of 49% of those who access news on a tablet say they also read a printed newspaper at least once each week; 81% also watch TV news and we see similar patterns with smartphone users.

Percent of tablet and smartphone users using other media sources weekly (all countries)



Q3: Which, if any, of the following have you used in the last week as a source of news?
Base: All markets (n=11004) Tablet users (n=2726) Smartphone users (n=5042)

Digital may be impacting traditional platforms but it is not yet replacing them. For most people digital news is extending the range of options available.

See section 3.1. Multi-platform news and the Impact of tablets and smartphones, p. 47

Uneven Pace of Change – Differences between and within Countries

Despite the general growth of online and multi-platform news, we find that a sizeable minority is sticking with traditional platforms such as TV, radio, and print, particularly in Germany and France. Despite this being an online survey, one in three of our French and German samples said they had *only* used traditional news platforms in the previous week. In Germany, we find that 58% of our sample are using *only* traditional or *mainly* traditional news platforms[6] – compared with 35% in the US and 29% in Japan.

See essay: Uwe Hasebrink and Sascha Hölig on the reasons for Germany's different path. p. 81

Amongst online news users, we also see marked differences between countries over the extent to which traditional news brands are being disrupted. In countries like the UK and Denmark, traditional news brands continue to attract 80% or more of the online audience, whilst in Japan and the US 'pure players' and aggregators have attracted a much bigger market share. In the UK, the strength of broadcast brands is largely accounted for by the BBC, while in both the US and Japan it is a newer player, Yahoo that attracts most users with 32% and 63% respectively. Social media and blogs are used more as a source of news in Spain, Italy, urban Brazil, and the US, than in our other countries.

How traditional news brands perform online by country

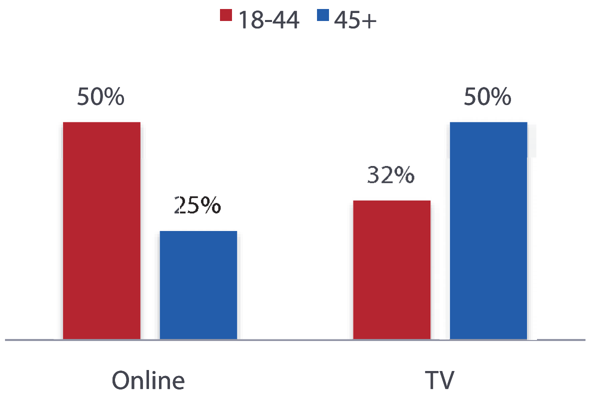
	UK	Germany	Spain	Italy	France	Denmark	US	Brazil	Japan
Broadcast news brands	45%	20%	36%	31%	18%	35%	35%	42%	38%
Newspaper brands	35%	25%	42%	37%	26%	54%	31%	37%	66%
Newer brands (HuffPost, Yahoo)	24%	28%	25%	38%	26%	18%	41%	43%	66%
Social media, blogs	23%	21%	35%	35%	20%	33%	32%	51%	25%

Q3: Which, if any, of the following have you used in the last week as a source of news?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

[4] This is confirmed by other research – see Pew Research Center's Project for Excellence in Journalism, Mobile Devices and News Consumption, http://stateofthemedia.org/2012/mobile-devices-and-news-consumption-some-good-signs-for-journalism.
[5] This aggregate information is also borne out at country level (see p. 51).
[6] We have segmented our samples using both platform- and interest-based approaches, which are explained on pp. 22–24.

Thirdly we see marked differences in behaviour within countries – with a clear divide between younger and older groups. Younger people are more likely to use social media and aggregator brands and in all countries they show a strong preference for online. For 'under 45s' – almost half the population – the internet is now the MAIN source of news as well as their most frequently accessed source. For 'over 45s' the main source remains TV, with other traditional platforms also important.

MAIN source of news by age (all countries)



Q4: You say you've used these sources of news in the last week, which would you say is your MAIN source of news?
Base: All who have used news sources in the last week (n=10843)

This is a split defined more by age than any other demographic factor and reflects the habits of those who have grown up with the internet or have adapted to it as part of their working lives.

It should be noted that our numbers understate the importance of traditional platforms because of our (online) sample. However this also means that the platform differences noted above are likely to be even more marked amongst the older groups.

Newspaper Readership and Purchase

This is the first year we have collected data of newspaper (printed) purchase, so the most interesting findings are around the differences between our nine surveyed countries rather than changes over time.

Claimed newspaper purchase (at least once a week) remains high in most countries. It is strongest in Japan (68%), Italy (59%), and Germany (56%) and lowest in France (39%) and the US (42%).

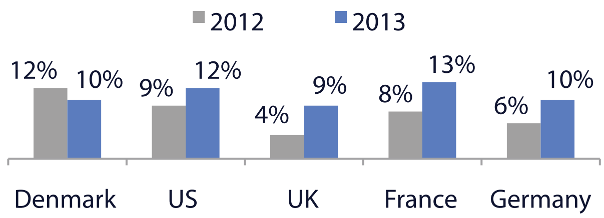
There are sharp differences in the balance of ad hoc purchase (newsstand/shop) vs ongoing commitment (mainly home delivery). Japan has 84% home delivery whereas in Italy 86% of purchases are at the newsstand or shops. Germany has a healthy balance, with a strong leaning to home delivery.

Paying for Digital News

Whilst 50% of our global sample (average) said they had bought a printed newspaper in the last week, only 5% said they had paid for digital news in the same time period. This is partly because the majority of online newspapers still do not charge for news – although that is changing rapidly with the erection of paywalls, combined subscriptions, and app-based purchases.

Since our last survey, we've seen a significant rise in the number of respondents paying for online news – albeit from a low base. In the UK 9% (+5) of our sample said they had paid for digital news in the last year. France is at 13% (+5) and USA 12% (+3).

Percent paying for digital news in past year by country



Q7: Have you paid for DIGITAL news content, or accessed a paid for digital news service?
Base: All markets UK (n=2078) US (n=2028) Germany (n=1062) France (n=973) Denmark (n=1007) Percentages that said yes in the last week, month, year or longer than a year

In the United States, we find that smartphone and tablet users are significantly more likely to pay than other online news users. Even after controlling for the following variables: interest in news, age, gender, education and income, they are on average almost twice as likely to pay as those who don't use these devices. We do not see the same device impact in the UK where the eco-system around paid news is less developed and there are a large number of high quality free news apps in the market. .[7]

All four of the countries surveyed for the first time in 2013 show higher percentages of people who have paid for digital news in the last year – with Brazil (24%) and Italy (21%) leading the way. Italy and Spain's figures are largely driven by one-off payments for apps and articles while the US and Denmark statistics are more fuelled by ongoing digital subscription.

Of those who are not currently paying, more than one in ten (14% on average) said they were very likely or somewhat likely to pay for digital news in the future ('for sources that you like'). In Brazil the figure was a striking 58%.

See section 2: Paying for News, p. 41
See Essay: Robert G. Picard, 'The Bottom Line' p. 89

[7] The methodology behind our controlled regression test around the impact of devices on payment can be found on our website digitalnewsreport.org

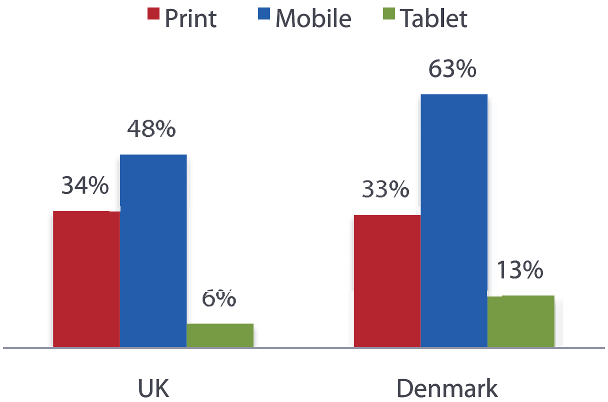
Where and When we Access the News

There are new data in this year's survey from the UK and Denmark about the devices and locations used for accessing news. These show tablets are still mainly used in the home – and specifically in the living room. Everywhere else, given the choice, the smartphone is preferred over the tablet as a way of accessing news. Portability trumps screen size.

In the workplace 71% of news access comes via the computer, while in the car, radio still dominates (84%). On public transport in Denmark, people are twice as likely to use a mobile phone for news (63%) as to read a printed newspaper (33%). In the UK, the data show 48% use mobile phones, 34% use print, and 6% access news via a tablet.

See section 1.4: Where and When do we Access the News? p. 27

Media used to access news on public transport (UK and Denmark)



UK3B: Please mention the key news media you used in these locations.
Base: Those who access news while travelling via public transport UK (n=270) Den (n=92)

Pathways to News – the Rise of the New Gatekeepers

Last year, we were only able to ask the question about how people discover news in the UK. Now we are able to see results from all nine countries, with significant differences emerging. Previous US research,[8] along with our survey last year, suggested that brand was still the most important pathway to news, followed by search, and then aggregators and social media. This does not appear to be a universal pattern.

In France and Germany, search engines are the most important gateway – used about twice as often as in the UK. In Brazil, social media are the top-ranked gateway for our urban-based online sample (60% said it was one of the five most important ways of finding news). The same is true in Spain (45% social media compared with 40% for search). Japanese consumers, by contrast, are more likely to get news from aggregators and portals, followed by search.

Most important gateways to news

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Brands	34%	32%	38%	35%	16%	55%	20%	47%	28%
Search	24%	40%	40%	49%	45%	30%	33%	44%	39%
Social	17%	50%	45%	38%	14%	22%	30%	60%	12%
Aggregators	17%	16%	17%	16%	12%	7%	26%	37%	43%

Q10: Thinking about how you FIND news online, which are the main ways that you come across news stories? Chose up to five.
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

[8] Pew State of the Media report 2012.

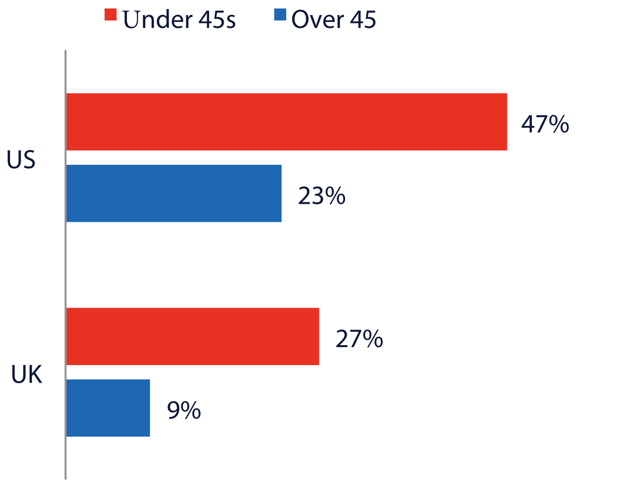
Beneath the headline numbers, however, again we see significant generational differences, with social media now rated more important than search amongst the 'under 45s'. By contrast, amongst the 'over 45s' in the UK, only 9% think social media are an important way of finding news.

This evidence from nine countries paints a picture where brands are being increasingly dis-intermediated by a growing range of pathways to their content. This is especially the case for light and occasional users and for younger users.

See section 3.5: Gateways: How Audiences Discover News Online, p. 61

Facebook, Google, Apple, and Amazon now have a significant and growing stake in the news industry. Their prominence as gateways enables them to take a share of advertising revenue and/or a cut of subscription revenues if, for example, people access via a branded app. Apple is a particularly dominant force in the news business in some countries – the UK, Denmark, and the US – but less so elsewhere.

Those using social media to FIND news (selected countries)



Q10: Thinking about how you FIND news online, which are the main ways that you come across news stories? (select up to FIVE).
Base: All markets UK (n=2078) US (n=2028) Germany (n=1062) Urban Brazil (n=985)

Market share of Apple devices by country

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Apple iPhones	39%	26%	25%	33%	34%	47%	43%	28%	56%
Apple iPads	63%	48%	42%	45%	51%	80%	58%	39%	70%

Q8a: Which, if any, of the following devices do you ever use for any purpose? (Multiple answers allowed).
Base: All smartphone users UK (n=1037) Germany (n=462) Spain (n=538) Japan (n=255) Italy (n=404) France (n=398) Denmark (n=617) Urban Brazil (n=418), US (n=913)
All Tablet users UK (n=585) Germany (n=188) Spain (n=220) Japan (n=123) Italy (n=222) France (n=189) Denmark (n=360) Urban Brazil (n=295), US (n=545)

In Denmark, Japan, the US (and the UK) there is a relatively equal split between Apple iPhones and other devices (mostly Android). Elsewhere, other operating systems such as Android and Blackberry tend to dominate. Apple has only a quarter of the market in Germany (26%) and Spain (25%).

See essay: Rasmus Kleis Nielsen explores the impact of the new gatekeepeers, p. 75

Trust and brand recognition by (selected) country

	UK	France	US	Urban Brazil	Japan
I prefer to get news from sites I know and trust.	77%	76%	82%	90%	71%
I don't notice which sites I am looking at...	16%	37%	24%	34%	44%

Q9 : Thinking about the different kind of news available to you online, to what extent do you agree or disagree with the following statements.
Base: All UK (n=2078) US (n=2028) Japan (n=985) France (n=973) Urban Brazil (n=985) % agree

The Enduring Role of Brands and the Role of Trust

Our survey cast further light on the importance of trusted news brands. In all countries we asked if people agreed that they preferred to get news from sites they know and trust. The figures were universally high, with 90% supporting the proposition in Brazil, 82% in the US, and 77% in the UK. People who consume heavily and are most absorbed by news are far more likely to agree with the statement (90% of UK multiple device users).

Asking the question in a different way ('I don't notice which sites I'm looking at…') showed a slightly different picture. The UK, which has strong traditional news brands, showed the lowest levels of agreement (16%). Brazil (34%), France (37%), and Japan (44%) – which all demonstrate greater usage of aggregators or newer 'pure player' brands – had the highest levels. One key factor in reducing brand recognition appears to be social media. Heavy social media users in the UK are more likely to agree that 'they don't notice which sites' they are using (23%).

Trust in traditional brands was also high when compared with blogs or social media. Broadcaster websites in the UK were trusted by 79%, with newspapers showing over 60%. In comparison, Facebook (8%) and Twitter (9%) were widely mistrusted – although heavy social media users were significantly more likely to trust what they found. Trust in news brands increases significantly with the amount of usage, so it is not surprising that smartphone and tablet news users also show more trust in traditional brands. We also find, in terms of their behaviour, that users of these devices are much more likely to go directly to a brand (50%) using a desktop icon, on a smartphone, compared to the overall sample (34%). The more devices – and the heavier the use – the better they tend to do.

See section 3.4: The Importance of Brand and the Role of Trust, p. 59

Selected traditional news brands market share by platform

Brand	Computer	Mobile	Tablet
Bild (Germany)	21%	21%	16%
Daily Mail (UK)	18%	14%	16%
La Republica (Italy)	34%	37%	38%
Le Monde (France)	16%	18%	15%
El Mundo (Spain)	24%	17%	22%
New York Times (US)	11%	9%	12%

Q8c: When using a computer, mobile or tablet to access news, which of the following sources did you use in the last week? *Base various*

As tablets and smartphones become more mainstream, people seem to be accessing the brands they feel comfortable with elsewhere. Although niche players can do well, scale and the ability of brands to cut through across platform are likely to become increasingly important.

See section 3.3: Online News Sources – winners and losers, p. 53

The Impact of Tablets and Smartphones on Brand Performance

This year we also asked respondents in all countries about specific news brands they accessed on different devices (computers, tablets, and smartphones) to see if there was an impact on market share.

We find that brands that have a reputation for breaking news, like Sky News in the UK, TF1 in France, and CNN in the US, tend to do better on mobile devices. Sky News has 15% share on the web and 25% on mobile in the UK, driven by a strong app offer and promotion from TV. In contrast, old-style web aggregators like Yahoo and MSN – where news services are linked to default browser settings – seem to be losing out in an app-based world – at least in the UK and US.

Breaking news brands vs aggregators market share by platform

Brand	Computer	Mobile	Gain/Loss	Tablet
Sky News	15%	25%	+10%	21%
CNN	16%	19%	+3%	16%
TF1	10%	16%	+6%	14%
Yahoo (US)	37%	25%	-12%	27%
Yahoo (UK)	20%	8%	-12%	9%
MSN (US)	14%	10%	-4%	10%

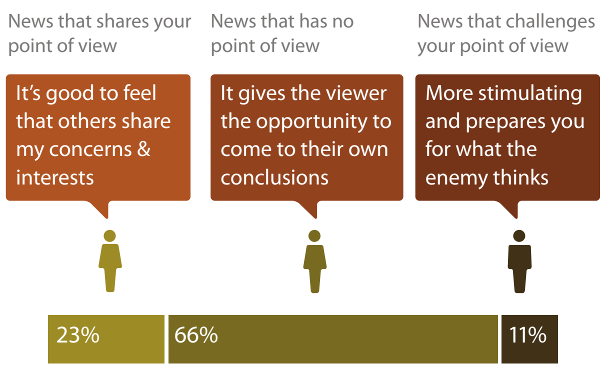
Q8c : You say you access news via a computer,/mobile, tablet. When using that device which of the following news sources have you used in the last week ? *Base various*

These differences, however, are very much the exception. Most brands do about the same in terms of market share on mobile and tablet as the general web, with the same problems of discovery.

Partiality in News

There is a growing debate in parts of Europe about the continuing relevance of impartial news provision – particularly on television. Many parts of the world (the US, Italy, and Brazil) already have a more partial, less regulated media system. Our survey found a strong preference in all countries for news that has 'no point of view' – led by Japan (81%), France (78%), Germany (76%), and the UK (70%). Brazil was the big outlier with only 28%.

Attitudes to partial or impartial news (all country view)



Q5c: Thinking about the different kinds of news available to you, do you prefer? (three options)
Base: All markets (n=11004) % agree Respondent quotes from UK

In general about a quarter of our samples preferred news that shared their viewpoint – lowest in Denmark (13%) and Japan (15%). The Brazilians (29%) and Danes (27%) love to be challenged by their news provider, whereas the Germans (1%) and Japanese (4%) do not.

See essay: Paolo Mancini on 'Partiality and Polarisation of News', p. 105

Sharing and Participation around News

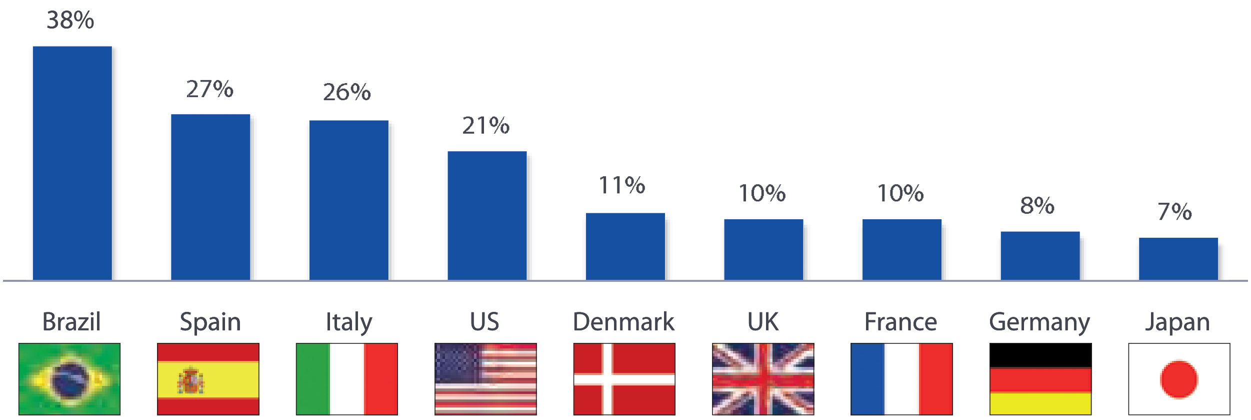
As last year, we find that there are marked international differences in the level and types of online participation with news. Taking one example – commenting on a news story via a social network – we can see that the Spanish (27%) Italians (26%), and Americans (21%) are more than twice as likely to comment on a news story via a social network as the British (10%). Brazilians are around five times more likely to comment than Germans or Japanese.

More generally, Brazil (92%), Italy (85%), and Spain (84%) have the highest levels of participation and engagement when we aggregate 12 separate types of online and offline engagement. This compares with Japan (64%), which has the lowest level of participation, along with Northern European countries such as Denmark, the UK, and Germany. This suggests that cultural factors (rather than access to technical tools) play the biggest part in the extent of online engagement with news.

The sharing of news through online networks continues to grow. In Brazil, 44% of our sample of online users said they share a news story on a weekly basis via a social network. 32% did so by email.

In the UK 18% had shared a news story in the last week by email or social network but amongst those actively interested in news the figures are much higher. 29% of those with a high interest in news share a news link at least once a week.

International differences around commenting on news (in social networks)



Q13: During an average week in which, if any, of the following ways do you share or participate in news coverage?
Base: UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

There is conflicting evidence about whether adoption of new devices is encouraging these trends. In United States, Apple smartphone users are 41% more likely to share news than other digital users – when controlling for the following factors: interest in news, age, gender, education and income. Tablets, on the other hand, do not seem to significantly encourage sharing in the same way when taking into account these variables.

Facebook, email, and Twitter dominate the sharing of news content in the UK, where no other network gets more than 3% weekly usage. We do not have data on social network usage from elsewhere but other research shows the mix of networks can differ significantly.

In the UK we have developed a model of participation that shows that the majority of our sample now participates in some way with news each week. We have identified a group of intense participators (10%) who engage proactively and share stories widely, often many times a day, and a group of easy participators (30%) who like and rate stories and post occasional comments. A further group participates only offline (23%) by talking about news to friends and colleagues and the remaining 37% are passive each week.

See section 3.6: Participation and Engagement Online, p. 66

Types of News

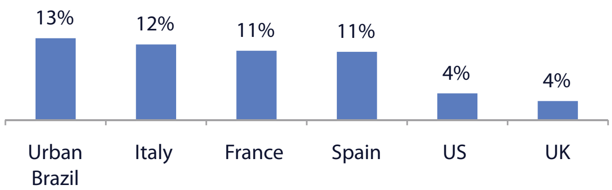
We find that digital news is gradually moving away from the article and picture format that has dominated for almost 20 years. Short video clips and the streaming of live news TV or radio coverage are becoming more popular. Americans consume the largest amount of short form video (27%), almost twice as much as those in the UK (14%), but when put together with podcasts and TV and radio streams almost half (47%) of our UK sample now uses news audio or video each week. Another recent innovation has been the development of live blogs as a way of covering breaking news and sports stories. 35% of our Japanese sample used these live pages at least once a week, with the French (19%), Italians and Spanish (16%) also enthusiastic. Only 8% of our Danish sample consumes live blogs – but they prefer to read longer articles (40%).

See essay: Neil Thurman on 'How Live Blogs are Reconfiguring Breaking News', p. 85

Smart TVs and Connected News

Finally, our survey focused on the fast-growing market in internet-connected TVs, including some specific additional questions in two countries: France and the UK.

Market share of of Smart TVs by country



Q8a/Q8b Which, if any, of the following devices do you ever use for any purpose/ have you used to access news in the last week?
Base: Selected countries UK (n=2078) US (n=2028) Spain (n=979) Italy (n=965) France (n=973) Urban Brazil (n=985)

Overall, the Brazilians (13%), Italians (12%), French (11%), and Spanish (11%) use connected TVs most for news – running at about three times the levels seen in the UK or the US.

Our respondents strongly agreed with the proposition that they would like to have more control over the scheduling of news content (like on a PC), 46% agreed in the UK and 64% in France. Also our sample was keen to have on-demand content fronted by a presenter they were familiar with in France (57%) and also the UK (52%).

When the whole sample was asked about potential interest in different types of on-demand news services on a television, there was a preference expressed for video content over text and a particular interest in breaking news alerts for TV (64% interest in France and 56% interest in the UK). Otherwise the most popular on-demand content on a TV was weather (53% France and 48% UK).

See essay: Dan Brilot on smart TV and the prospects for news, with additional exclusive data from YouGov, p. 93

Conclusion

This year's data offer contradictory evidence about the nature and rate of change in the news industry. The overwhelming message is that audiences increasingly expect news that they can access anytime, anywhere. But that doesn't mean they only want online news. Audiences may be embracing news on tablets and smartphones but they still want to catch up with broadcast news and they enjoy taking time with the printed page. It's a multi-platform world and becoming more so.

At the same time – and pulling in a different direction – we see the strong influence of habit, culture, and tradition. We see countries like Germany and France that are slow to change and we see significant groups – mainly older – within all countries who are refusing to join in the digital and multi-platform news revolution altogether. These divisions between and within countries are making it increasingly difficult to address audience needs with the simplicity that was possible in the past. Embracing digital is clearly the future, but news brands can't afford to leave behind groups who still carry huge influence and drive most of the revenue.

Clearly news brands still matter but a strong name and long heritage is no longer enough. Our data show that there still is a yearning – in an ocean of content – for trusted news across a range of subject areas, but newer brands like Yahoo and the Huffington Post are also proving they can fill that role alongside a raft of specialist providers, blogs, and social media too.

Against this background, it is not surprising to see more and more anguished debates around editorial and distribution strategies. Most news organisations are reconfiguring their workflows for the multi-platform age – trying to drive more output to more platforms with the same number (or fewer) journalists. Finding new audiences and revenues is proving more challenging. Some news organisations are looking to exploit niches, others are pushing for scale and paywalls are going up around the world. As ever, success will depend on a combination of clear strategies and a strong understanding of changing audience behaviours. In that respect, we hope this annual survey provides useful and insightful data to help inform the challenges to come.

Reuters Institute Digital News Report 2013

Introduction

We here publish the key data tables from our 2013 survey. For each section, we have provided a short piece of context at the start and have selected the most interesting charts and tables – illustrated where relevant with comments to explain the significance of a particular element.

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

Background

In order to understand the results it is important to set out the demographics and internet use in each country, which will contribute to some of the international differences that we find. We also offer a brief pen portrait of the media landscape in our nine surveyed countries, to help contextualise the results.

Figure 0.1: Internet penetration, gender and age breakdown by country

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Internet Population	52,731,209	67,483,860	31,606,233	35,800,000	52,228,905	4,989,108	245,203,319	88,494,756	101,228,736
Male	48%	48%	49%	48%	49%	50%	48%	49%	49%
Female	52%	52%	51%	52%	51%	51%	51%	51%	51%
18 to 24	12%	10%	11%	9%	12%	13%	9%	21%	9%
25 to 34	17%	14%	21%	18%	17%	16%	18%	24%	15%
35 to 44	17%	18%	19%	19%	18%	19%	19%	21%	17%
45 to 54	19%	18%	15%	16%	18%	21%	15%	16%	15%
55+	36%	39%	33%	38%	35%	31%	37%	18%	44%

Whilst most of our countries see internet penetration of 80% or more, Italy and Brazil in particular have far lower levels of access. In those countries we are looking at the habits of around (or less than) half the adult population. It should also be noted that the Brazilian sample is (uniquely) an urban-based sample (and skews far younger, with roughly half the proportion of over 55s, compared to the other countries surveyed). The 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.

United Kingdom

The media environment is characterised by a vigorous and highly competitive national press – including a strong tabloid sector accounting for the majority of newspapers sold daily – and the best-known public broadcaster in the world. The BBC reaches around 80% of all consumers with news on all platforms each week.

Germany

The country’s federal structure has shaped its media environment with a number of regional and national public broadcasters competing for audiences with powerful commercial operators. Each of the 16 regions regulates its own private and public broadcasting. Germany is home to some of the world's largest media conglomerates, including Bertelsmann and the publisher Axel Springer. There are several national newspapers, but the press market is strongest at a regional level, with more than 300 titles. Newspapers and magazines have also taken a lead online, with public service broadcasters facing restrictions on the extent of their digital activities.

Spain

The media in Spain have witnessed a significant expansion in recent years with the emergence of new commercial operators and the launch of digital services. Radio Television Espanola (RTVE) is the public broadcaster. There are 13 regional TV stations backed by regional governments and many local stations. Ownership of daily newspapers is concentrated within large media groups with popular news brands such as *El Pais* and *El Mundo* leading the charge online.

Italy

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

France

France has more than 100 daily newspapers. Most of them are in private hands and are not linked to political parties and the most successful papers are often regional rather than national. Online, many of the best known national titles such as *Le Monde* and *Le Figaro* face competition from new players such as Mediapart, Rue89, and now the Huffington Post. Television news remains popular, with viewership split between France Télévisions, privately owned TF1, and a range of cable and satellite providers. France's long-established commercial radio, particularly RTL and Europe 1, still commands large audiences, along with a range of publicly funded stations such as France Inter.

Denmark

Denmark's main public broadcaster, Danmarks Radio (DR), operates six TV networks alongside national and regional radio stations. It is funded by a licence fee and is also a strong presence online. TV2, a government-owned commercial broadcaster, operates a round the clock TV news channel along with a number of niche channels. Popular newspapers include *Jyllands-Posten*, *Ekstra-Bladet*, *Berlingske Tidende*, *BT*, and *Politiken*, all of which have a healthy market share online and have performed particularly well compared with the websites of news broadcasters.

United States

There are more than 1,500 daily newspapers in the US, most of them with a local or regional readership. Print circulations are in long-term decline as readers turn to the internet. More than 300 US newspapers, including the *New York Times* and the *Los Angeles Times*, have now introduced paywalls – twice as many as at this time last year.[9] In TV news, the big networks ABC, CBS, and NBC dominated for decades until the take-up of cable and satellite and the arrival of Fox which is now the best rated cable news network. There are around 10,000 commercial radio stations, including many dedicated to news, sports, and talk. The US is the home of the internet and so it is appropriate that one of the early pioneers, Yahoo, is the single biggest news provider online. Traditional news companies face new threats from pure players like the Huffington Post, now owned by AOL.

Brazil

South America's biggest media market is home to thousands of radio stations and hundreds of TV channels. Media ownership is highly concentrated. Domestic conglomerates such as Globo, Brazil's most-successful broadcaster, dominate the market and run TV and radio networks, newspapers, and successful online operations. Brazilians are among the world's top users of blogs and social networks and use of online is growing fast. Google's Orkut and Facebook are the two biggest social networks.

Japan

There are five national terrestrial TV companies, including publicly funded NHK, which also runs national radio networks. Newspaper readership is particularly high, with around 80% of Japanese reading a paper every day. National dailies sell in millions, circulations boosted by afternoon and evening editions. An increasing number of newspapers charge for access to their websites. Japan was amongst the first to offer internet access via mobile phones, using walled-garden services like iMode. These feature phones are gradually being replaced by smartphones.

[9] http://mashable.com/2012/11/04/paywalls-infographic.

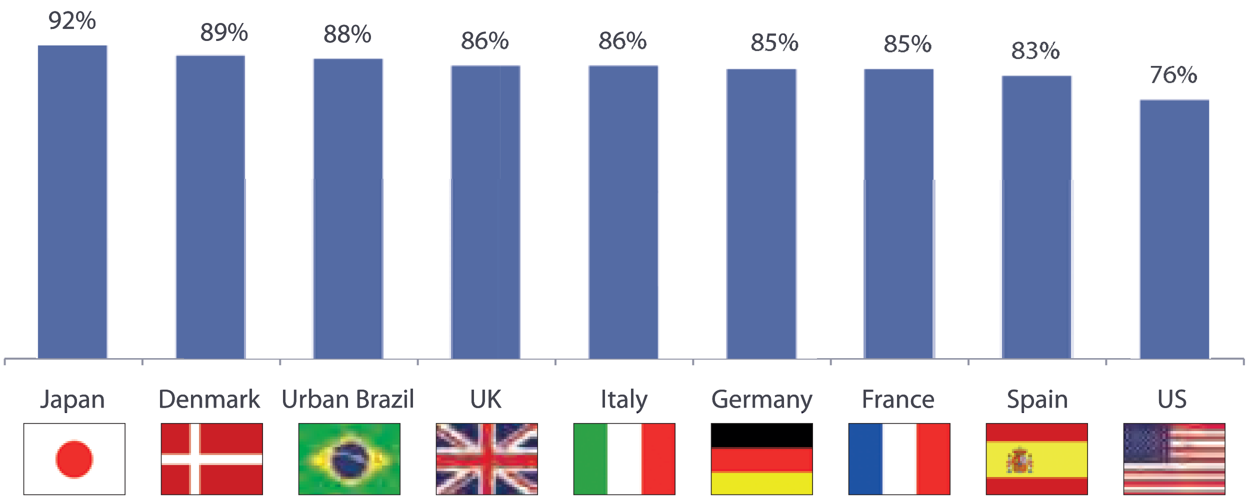
Section 1. News Consumption And Access

In this section we lay out the overall shape of news consumption, the time spent on different devices, and also explain in more detail the segmentation we have used to drive our insights. We also explore interest in different types of news, such as political and entertainment news, along with attitudes to partiality and polarisation of news.

1.1 Frequency of Access and Interest in News

Our survey of online users shows some differences in how frequently news is accessed by consumers in different countries across all platforms – TV, radio, and online. The Japanese access news most frequently, with 9 in 10 accessing news at least once a day compared with around three in four Americans in our sample. Across the five countries surveyed in 2012 (UK, US, France, Germany, and Denmark) the individual country figures are broadly comparable to last year but we have seen a general uplift of more than 5%, which could relate to the increased use of smartphones and tablets. We have seen more pronounced changes in the UK and France, with increases of +11% and + 7% respectively.

Figure 1.1a: Daily news consumption by country



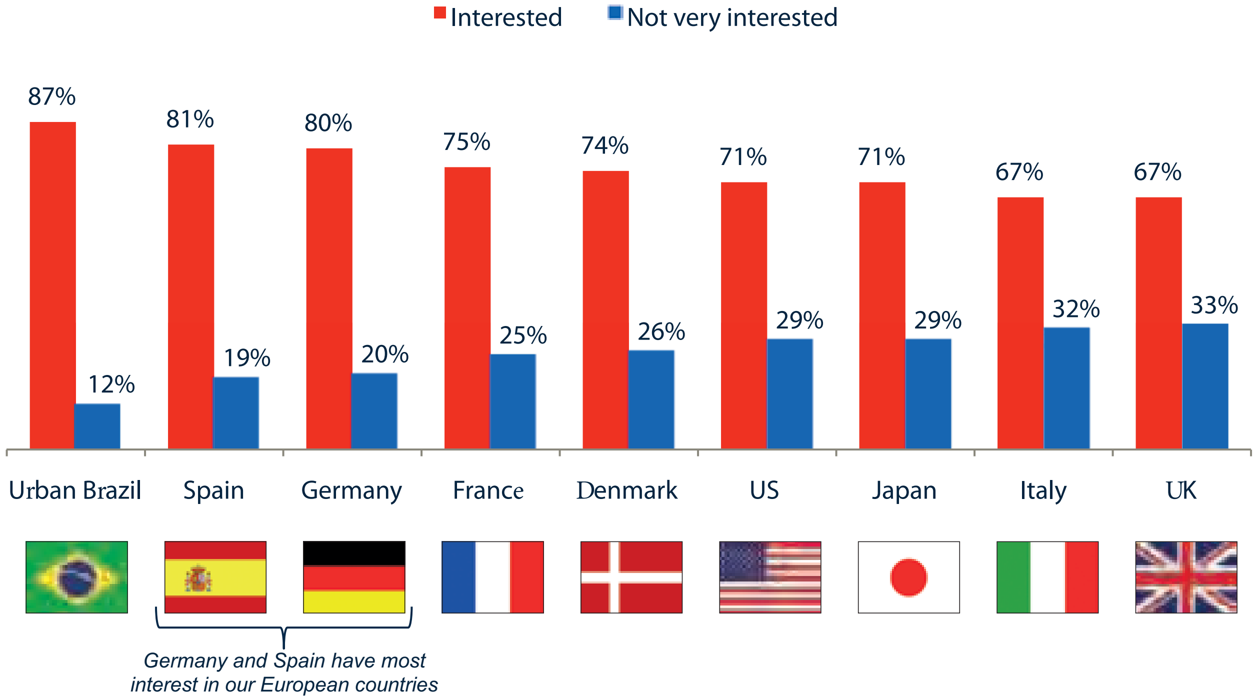
Q1b: Typically, how often do you access news (in any way)? By news we mean international, national, regional/local news and other topical events accessed via radio, TV, newspaper or online.
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

In general, daily news consumption is significantly higher amongst males in all of our surveyed countries. It is also significantly higher amongst those aged 35+ and those using smartphones.

Interest in News

As well as frequency of access, we also asked about levels of interest in the news. Here, our sample from urban Brazil claimed the highest interest in news – while Italy and the UK showed the greatest number of people who were only somewhat, not very, or not at all interested in news.

Figure 1.1b: Interest in news by country



Q1c: How interested, if at all, would you say you are in news.
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

Across all our countries (see Figure 1.2a), interest in news increases with age, with the 55+ group registering 20 percentage points higher than the 18–24s. Again, men say they are more interested in news than women.

Figure 1.1c: Interest in news increases with age (ALL countries)

	Male	Female	18-24	25-34	35-44	45-54	55+
Interested in news	78%	70%	60%	68%	72%	77%	80%

Q1c: How interested, if at all, would you say you are in news?
Base: All markets (n=11004)

1.2 Segmentation Approaches

News interest segmentation
We have combined these metrics of frequency and interest to give us a first non-overlapping categorisation of the news universe that we can apply across all of our countries.

- News Lovers: These are people who access the news several times a day and say they are extremely interested in the news.
- Daily Briefers: These are people who also access the news several times a day but they say they are a bit less interested (very or somewhat) in the news.
- Casual Users: These are people who consume less frequently – anything between once a day to once a month – and they also tend to be less interested in the news with a majority only somewhat interested in news.
- Non Users: The people who excluded themselves from the survey who say they access news less often than once a month (depending on the country, this was between 2% in Japan, Denmark, and Brazil, 7% in the United States, and 9% in the UK).

We'll refer back to these groupings throughout this study. News Lovers consume more, share more, are wealthier, and are more likely to pay for news, but Daily Briefers are important in reaching mass audiences, which remains important for advertisers. The majority of consumers across countries can be considered 'Daily Briefers'. The US has the highest proportion of Casual Users, but also a high proportion of News Lovers. Denmark has both the highest proportion of News Lovers and the lowest share of Casual Users, along with Brazil.

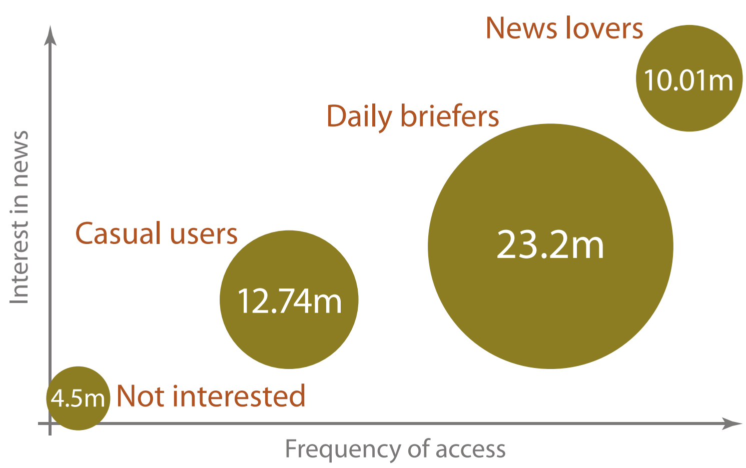
Figure 1.2a: News interest segmentation by country

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
News Lovers	22%	22%	17%	24%	17%	27%	26%	25%	21%
Daily Briefers	51%	55%	56%	51%	58%	55%	41%	58%	63%
Casual Users	28%	24%	26%	26%	26%	18%	33%	18%	16%

UK example

Within a country like the United Kingdom, we can roughly map these groups to get a sense of the total size of each group. Assuming 50m UK adults over 18, internet penetration of 84%, and 9% non-news users, this would produce the addressable groups shown in Figure 1.2b.

Figure 1.2b: UK online users segmented by level interest and frequency of access



Indicative base of 50m UK adults, 84% internet access and 9% of them not accessing news (not interested) in the last month

- News Lovers: Are much more likely to own a smartphone and tablet; they are twice as likely to use Twitter for news as the average. They tend to be male (57%) and have higher incomes and social grade (heavy skew to AB). They are particularly interested in politics and international news but only show an average interest in entertainment and celebrity news. They are heavy online users but are twice as likely to use quality 'broadsheet' printed newspapers along with the BBC and Sky News for television news. They are twice as likely to have paid for a digital news service in the last week as Daily Briefers.
- Casual Users: Tend to be female (60%) and more traditional in their media habits. They seem to be particularly attached to print, especially mid-market and popular newspapers and magazines. A significant minority of this group use only traditional media sources (31%). They are particularly uninterested by international and political news. They tend to have lower incomes and be from lower social grades (C2DE). Many own smartphones and tablets but are less likely to use them for news than the other groups.

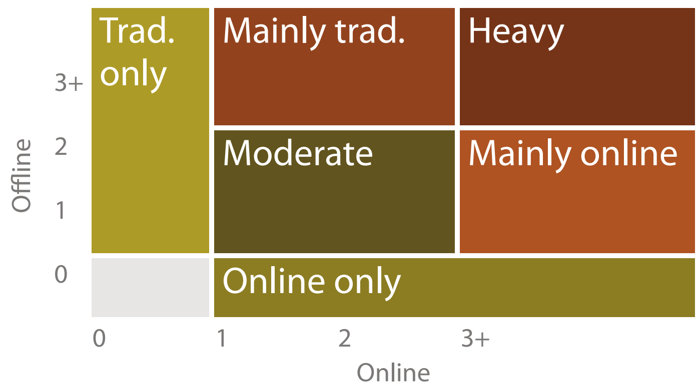
Platform segmentation

In a second categorisation, we have split our samples by platform use. This non-overlapping segmentation is achieved by looking at the number and type of devices used to access news (see Figure 1.2c).

These segments were cross-checked with claimed time spent (where data was available in the UK to ensure this approach was robust).

When applying this to all our countries we can see that many European countries tend to have a stronger attachment to traditional methods of access than say the United States, Brazil, and Japan.

Figure 1.2c: Audience segments by platform used to access news (Representation of approach)



These segments were cross-checked with claimed time spent (where data was available in the UK) to ensure this approach was robust.

Figure 1.2d: Segments based on platform preference (by country)

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Internet penetration	84%	83%	67%	58%	80%	90%	78%	46%	80%
Online only*	8%	6%	9%	11%	6%	6%	11%	11%	13%
Mainly online	7%	5%	10%	11%	6%	9%	14%	18%	10%
Half half**	39%	31%	38%	40%	33%	39%	40%	48%	48%
Mainly traditional	20%	25%	22%	20%	24%	28%	12%	15%	16%
Traditional only***	25%	33%	20%	19%	32%	18%	23%	9%	13%

* Online only: This is a smaller segment and a slightly schizophrenic one. They include some heavy news users but also a large number who are not particularly interested in news at all. This segment has a relatively high proportion of 18-24s.

** The half and half segment contains the secondary group of heavy multi-channel users. This sub-group makes up around 10% of the total sample and its members combine multiple traditional and online sources each week They have much in common with news lovers, they are more likely to pay for news, and are heavily into social media. We will refer to this sub-group from time to time.

*** Traditional only: These users tend to be older with a female bias across all countries.

Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

Despite this being an online sample, one in three of both the French and Germans – and one in four in the UK – say they have *only* used traditional ways of accessing news in the last week (see Figure 1.2d). In both countries over 55% of our sample is using traditional only or mainly traditional news consumption (compared with 35% in the US and 29% in Japan). The Japanese and our sample from urban Brazil are leading the charge for mainly online and exclusively online news habits.

1.3 Sources and Access to News

We asked respondents to tell us about the sources they used for news. Our questions broke this down into different types of television, radio, print, and online news, so we could understand the full granularity and complexity. In an online context, for example, it is useful to be able to distinguish between the websites of traditional media outlets, aggregators, social media, and blogs. We can then aggregate these sources back together to get a picture of the overall platform balance between TV, radio, print, and online for the respondents to this online survey across all of our countries. France and Germany have the lowest levels of online news access, with both countries showing strong allegiance to traditional news platforms.

Online and television news remain the two most frequently accessed platforms for news among our online survey respondents in all our countries. Online is furthest ahead in Japan and with our urban sample in Brazil. When taking into account those who are offline (56% in Brazil and 42% in Italy, for example), television news is likely to be ahead pretty much everywhere.

Figure 1.3a: Platforms used to access news on a weekly basis (Frequency)

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
TV	79%	82%	72%	74%	84%	85%	72%	75%	69%
Radio	37%	51%	39%	34%	44%	53%	28%	19%	24%
Print	59%	63%	61%	59%	46%	49%	47%	50%	63%
Online	74%	66%	79%	80%	68%	81%	75%	90%	85%

Q3: Which, if any, of the following have you used in the last week as a source of news?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

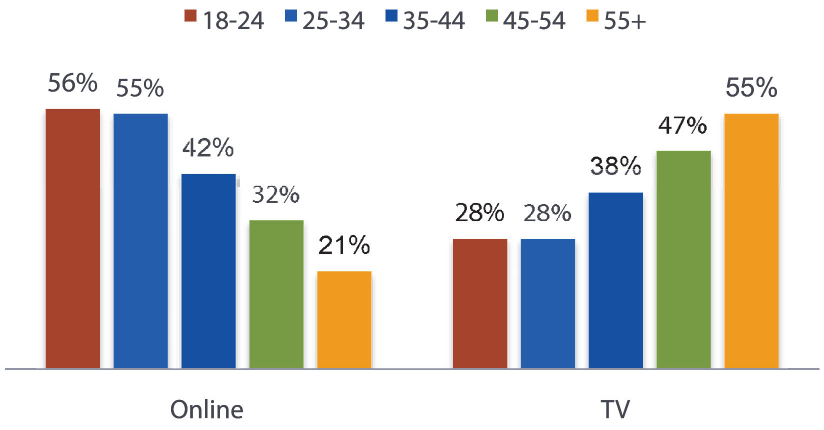
We also asked respondents about their MAIN or most important source of news. Here we see a similar story. Television and online are the two platforms that our respondents value or rely on most. Once again Germany and France show themselves with a strong preference for TV over online, with Brazil and Japan narrowly preferring online (see Figure 1.3b).

Figure 1.3b: MAIN news platform by country

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
TV	41%	43%	33%	39%	57%	44%	43%	38%	35%
Radio	7%	13%	9%	5%	12%	8%	5%	2%	4%
Print	15%	18%	15%	13%	6%	11%	9%	6%	20%
Online	35%	25%	41%	42%	23%	35%	39%	53%	39%

Q4: You say you've used these sources of news in the last week, which would you say is MOST IMPORTANT or which would you say is your main news?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

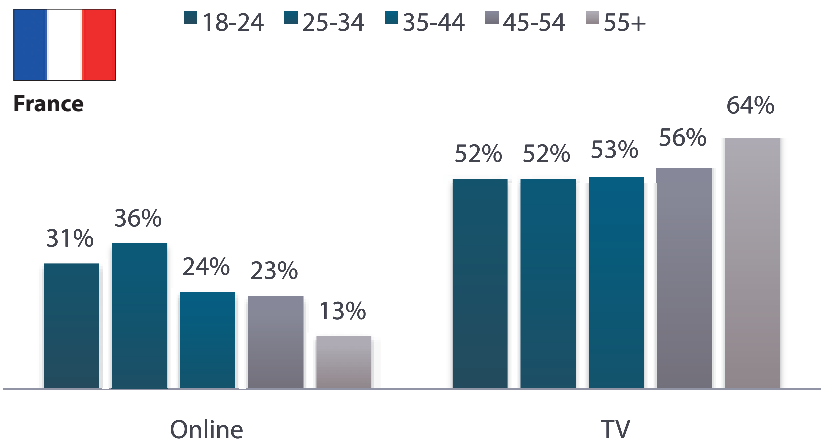
Figure 1.3c: Main news platform by age (Online vs Television) - ALL countries

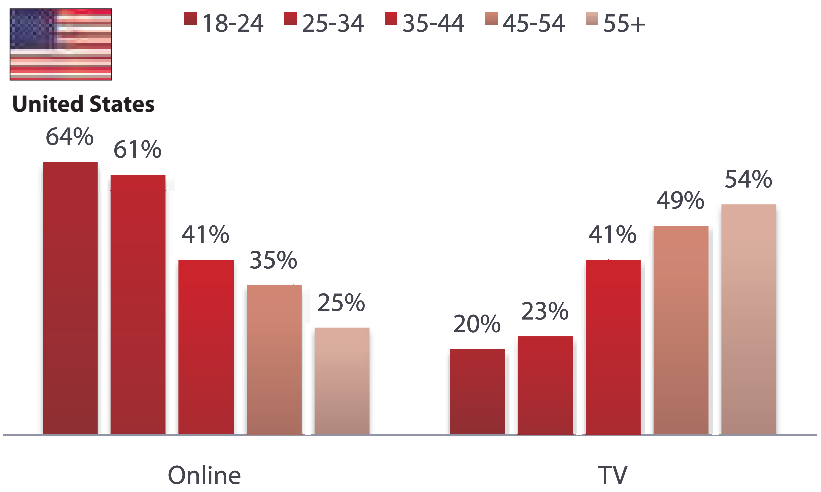


Q4: You say you've used these sources of news in the last week, which would you say is your MAIN source of news?
Base: All who have used news sources in the last week (n=10843)

The picture changes when we look at the importance assigned by different age groups. Looking at ALL our countries together, we can see that there is a significant divide developing between the under 35s who prefer online and those aged over 45 who strongly prefer television.

Figure 1.3d: Main news platform by age (Online vs Television) - ALL countries



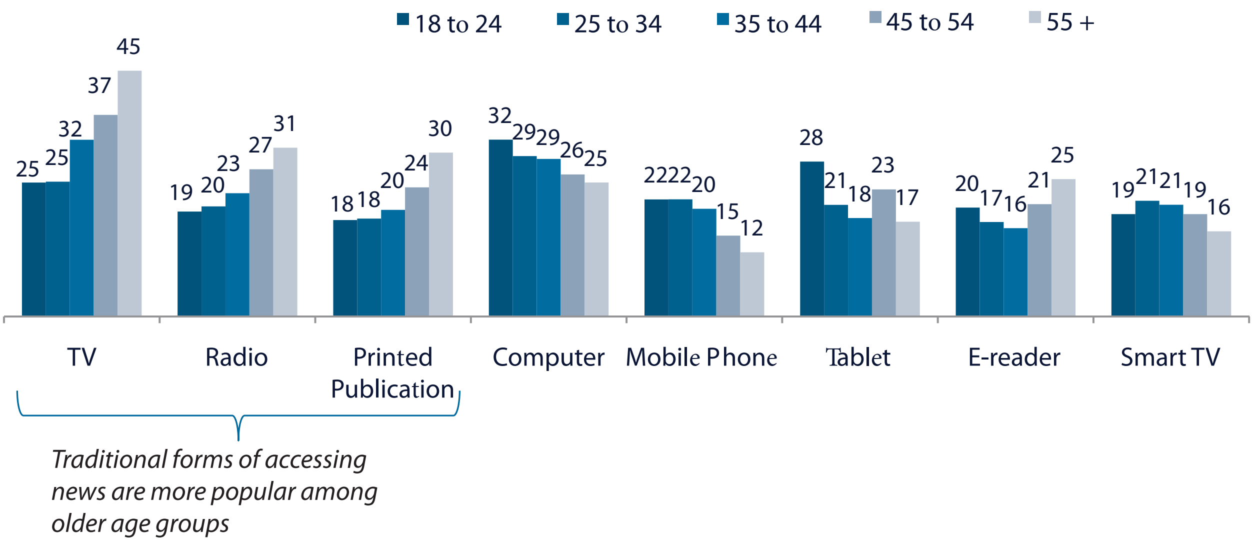


All countries follow this pattern with the exception of France, where young people still show a strong loyalty to television news and have not embraced internet news in a significant way.

Q4: You say you've used these sources of news in the last week, which would you say is your MAIN source of news?
Base: All who have used news sources in the last week France (n=963), US (n=1916)

We can also see the impact of age when we look at UK data showing the time people spend on different devices. Not only do the young value online news more than TV, they also spend more time with computers – along with considerable amounts of additional time on smartphones and tablets. Older groups spend far more time with traditional media, such as TV news, radio news, and print.

Figure 1.3e: Mean time spent accessing news by device per day UK (minutes)

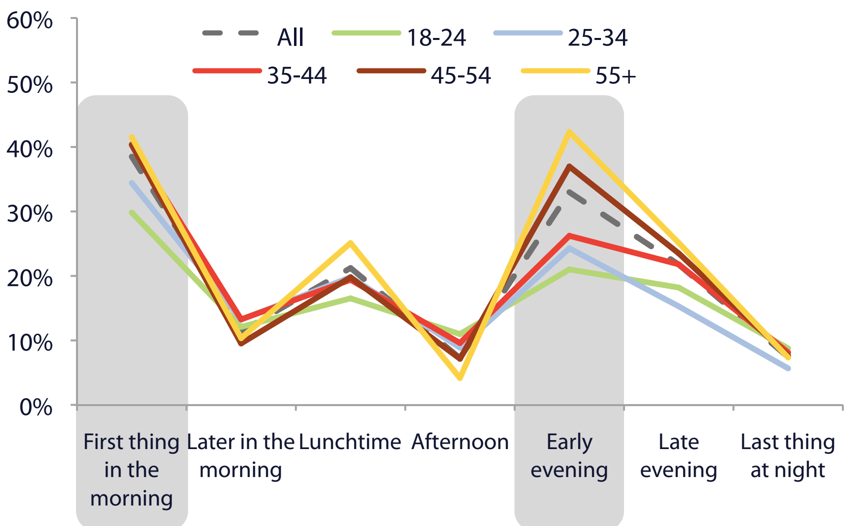


QS1: On a typical day, how much time do you spend accessing news on EACH of the following?
Base All UK=2078
Chart shows mean time spent per day in minutes

1.4 Where and When do we Access the News?

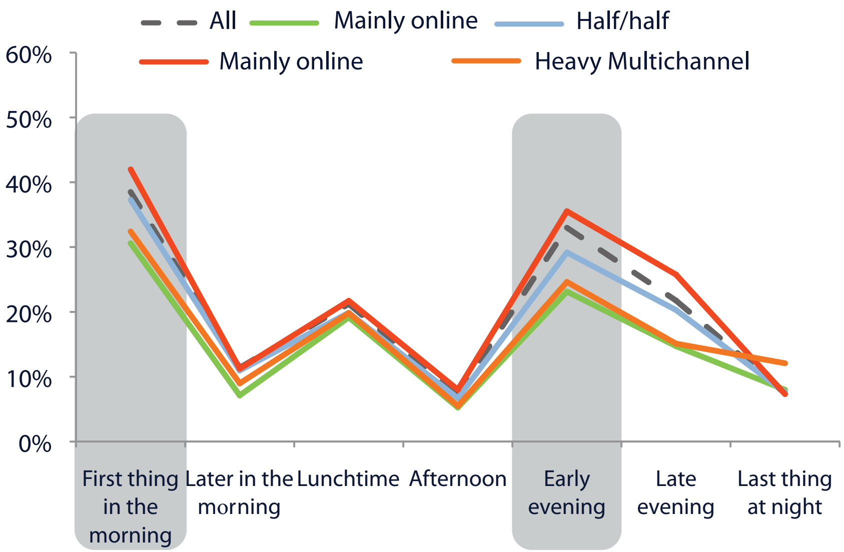
Typically consumers in the United Kingdom access news first thing in the morning or early evening. Younger people tend to access in a more even way throughout the day. Older people such as the over 55s are more likely to follow the breakfast, lunch, and early evening peaks, compared with all the groupings under 45. Even the 35–44s seem to be losing the commitment for appointment-to-view news bulletins in the early and late evening.

Figure 1.4a: News access across the day by age (UK)



QS2: When do you typically access the news?
Base: UK=2078 18 to 24 (n=269) 25 to 34: (n=286) 35 to 44: (n=321) 45 to 54 (n=383) 55+ (n=819)

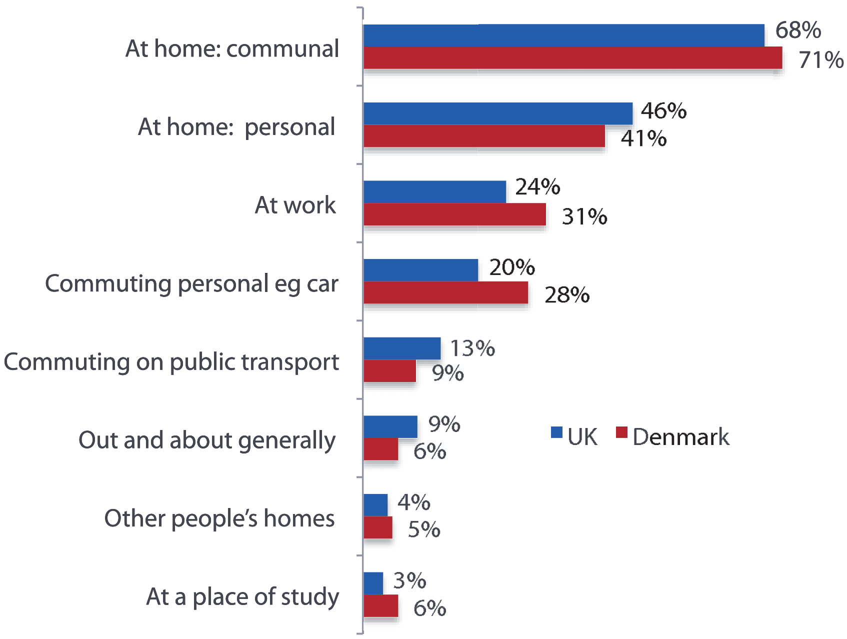
Figure 1.4b: News access across the day by platform segment (UK)



QS2: When do you typically access the news?
Base: UK=2078 Mainly Online (n=162) Half/ half (n=791) Mainly traditional (n=400) Half/ half moderate (n=597) Heavy multichannel (n=194)

Looking at our segments, we can see that traditional users are more likely to have fixed times of day for consuming the news, whereas the mainly online and heavy multi-channel groups tend to access throughout the day (50% and 61% respectively) reflecting the greater ease of access to online news outside the home. Heavy multi-channel users also extend their news consumption right through to bedtime.

Figure 1.4c: Where news is accessed (UK vs Denmark)



QS3A: Where were you when you looked at/listened to the news over the last few days?
Base: UK=2078, Denmark =994

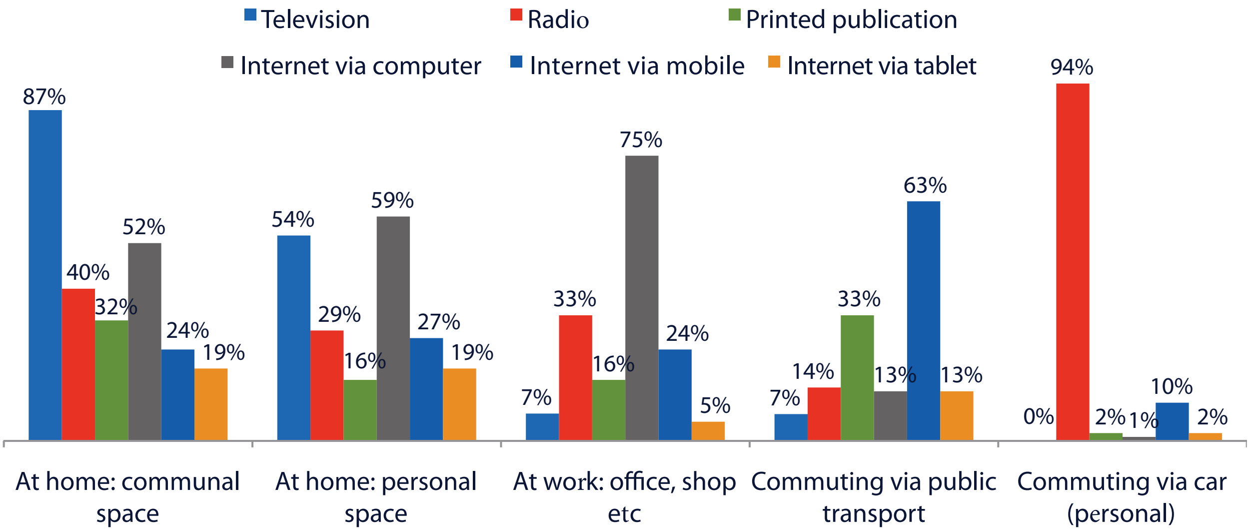
Locations for news

For the first time, this year we have been able to look in detail at locations and devices used for news across the day in two of our countries, Denmark and the UK. The overall patterns in both countries are almost identical, with most news use in the home – followed by commuting and work.

When we look at the specific platforms used in each location, we can see how the internet plays a bigger role at work and on the move. In general traditional media are not being replaced, although print is clearly being substituted in some areas.

Television is the main source of news in the living room but the computer takes over in personal spaces at home and at work. Radio dominates in the car. One element to note is the amount of media that are consumed in the communal space, with computers, smartphones, and tablets now competing with newspapers, magazines, and radio.

Figure 1.4d: News sources uses by location (Denmark)



QS3B: Please mention the key news media you used in these locations

Base: At home : communal (n=1421) At home: personal (n=957) At work (n=482) At place of study (n=70) While travelling via public transport (n=270) While travelling via private transport (n=400)

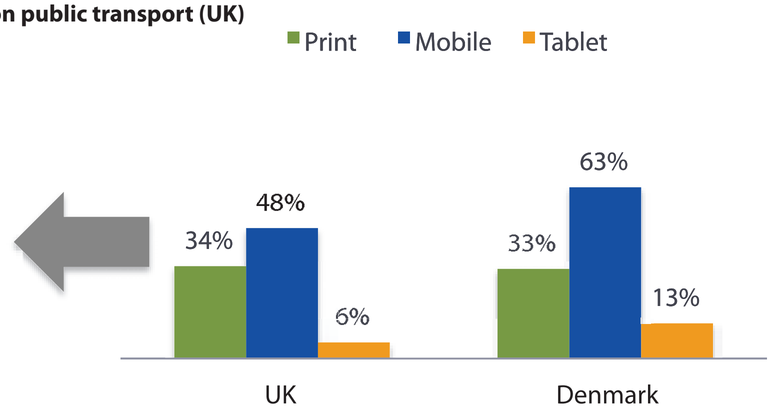
We see the greatest effects of substitution on the daily commute via public transport, traditionally a heartland for newspaper reading. In the UK and Denmark, the mobile phone has overtaken print as the main way of consuming news on the way to work. In Denmark, people are twice as likely to use a mobile phone for news (63%) than read a printed newspaper (33%).

On UK public transport 48% use mobile phones, 34% use print, and 6% access news via a tablet – though print is still ahead in London (56%), probably because of availability of strong free newspapers and limited internet access on the Underground.

The tablet remains largely confined to the home – certainly in the UK – although the arrival of smaller more mobile 7" tablets may change the mix in years to come. Once again, the shift towards digital is being led by younger age groups, with the over 45s largely sticking with print.

Figure 1.4e: Changing face of media use on public transport (UK)

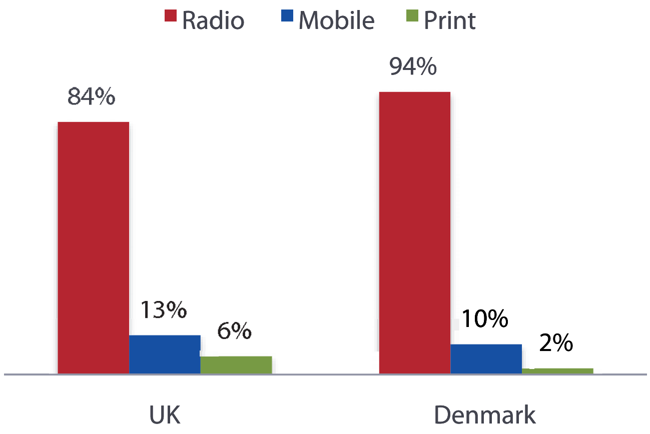
	London	South East	North
Mobile	46%	56%	48%
Print	56%	25%	28%



QS3B: Please mention the key news media you used in these locations

Base: While travelling via public transport UK (n=270) Den (n=92) ,
Those who have looked at news on public transport in last days London (n=66), South East (n=61, North (n=71)

Figure 1.4f: Changing shape of media use (private transport)



UK3B: Please mention the key news media you used in these locations.
Base: While travelling via private transport UK (n=400) Denmark (n=283)

The mobile phone is also by far the most important source of news when 'out and about generally'. Of those who looked for news in this way, 76% used a mobile phone in the UK, compared with 18% using printed newspapers. In Denmark the numbers are 85% by phone and 13% reading newspapers in print.

Despite platform substitution there is no evidence that brands are being substituted. Some of the most successful brands on the move in both countries are free newspapers such as *Metro* in the UK, which has been pursuing an aggressive digital strategy and is widely used on tablet and mobile, as well as in print.

In terms of personal transport – largely cars but also bikes – mobile phones are also making inroads as a source of news, not least because they can access audio-based news podcasts or other on-demand news content which can plug into headphones or a car sound system.

1.5 Interest in Different Types of News

We asked all our respondents to select their five most important types of news (see Figure 1.5a). As with last year, domestic news is the most popular type of news, closely followed by international, local, and regional news. Mirroring political and media structures, we see that regional news is most important in Germany. Local news matters more in a vast country like the United States where city newspapers and local TV stations have become a core part of the media diet. Our sample from urban Brazil tends to place more importance on business and financial news, health and education news, and science and technology news.

Figure 1.5a: Interest in types of news by country

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
News about the country	71%	70%	64%	62%	66%	70%	57%	73%	62%
International news	53%	67%	44%	42%	54%	66%	56%	42%	48%
Local news about my town or city	49%	47%	42%	49%	31%	48%	59%	52%	30%
News about my region	44%	53%	43%	38%	41%	27%	31%	16%	37%
Business and financial news	20%	18%	14%	16%	18%	24%	22%	30%	27%
News about the economy	44%	31%	41%	40%	35%	36%	52%	29%	48%
Entertainment and celebrity news	20%	18%	13%	15%	13%	14%	14%	24%	18%
Health and educational news	28%	27%	38%	35%	36%	29%	29%	55%	18%
Arts and culture news	11%	8%	21%	19%	17%	16%	9%	23%	20%
Sports news	31%	28%	36%	33%	27%	31%	23%	35%	32%
News about the country's politics	37%	50%	43%	52%	45%	51%	54%	34%	60%
Science and technology news	22%	29%	30%	31%	31%	30%	26%	40%	26%

Q2 Which of the following types of news is most important to you? Please choose up to five.
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

Looking at an aggregated view of our entire sample of 11,000 people we can see significant differences by age and gender (see Figure 1.5b). Men are much more interested in sports news, political news, and business and economic news. Women place more importance on health and education news, local news, and especially entertainment and celebrity news. In terms of age, interest in political and economic news grows as people get older. In contrast, entertainment and science and technology news are of greater interest for younger groups.

Figure 1.5b: Interest in news by age and gender (all countries)

	Male	Female	18 to 24	25 to 34	35 to 44	45 to 54	55+
News about the country	63%	68%	60%	62%	67%	69%	68%
International news	54%	52%	48%	47%	49%	54%	59%
Local news about my town or city	42%	52%	36%	41%	49%	51%	51%
News about my region	32%	42%	25%	31%	36%	40%	43%
Business and financial news	27%	15%	17%	20%	21%	20%	22%
News about the economy	46%	36%	30%	34%	37%	44%	49%
Entertainment and celebrity news	9%	24%	25%	25%	20%	14%	9%
Health and educational news	21%	43%	35%	35%	31%	31%	30%
Arts and culture news	11%	19%	19%	16%	14%	12%	15%
Sports news	44%	16%	28%	29%	33%	32%	28%
News about the country's politics	52%	42%	36%	35%	42%	48%	58%
Science and technology news	35%	22%	40%	32%	27%	27%	25%

Q2: Which of the following types of news is most important to you? Please choose up to five.
Base: All markets (n=11004) 18-24 (n=1244), 25-34 (n=1927) 35-44 (n=2043) 45-54 (n=1889), 55+ (n=3901)

Figure 1.5c: Interest in news by platform segment (see Figure 1.2d for explanation of segmentation)

	Heavy multichannel	Mainly online	Half/half moderate	Mainly traditional	Traditional only
News about the country	69%	67%	67%	72%	63%
International news	63%	58%	50%	61%	48%
Local news about my town or city	46%	44%	48%	49%	52%
News about my region	32%	30%	37%	41%	44%
Business and financial news	28%	26%	20%	24%	16%
News about the economy	47%	44%	41%	46%	39%
Entertainment and celebrity news	19%	21%	18%	15%	12%
Health and educational news	33%	33%	32%	34%	27%
Arts and culture news	20%	20%	14%	17%	10%
Sports news	35%	33%	31%	34%	27%
News about the country's politics	56%	53%	45%	55%	43%
Science and technology news	36%	41%	29%	27%	19%

Q2: Which of the following types of news is most important to you? Please choose up to five
Base: All countries (n=11004), Heavy multichannel (n=1200), Mainly online (n=1090), Half/half mod (n=3055), Mainly traditional (n=2105), Traditional only (n=2365)

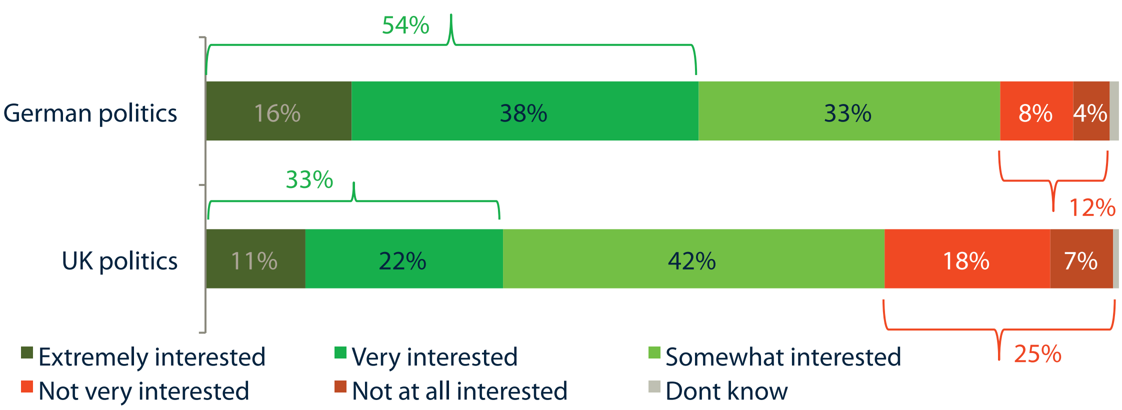
We can also look at the impact of platform usage on different types of news through our multi-country segmentation. Traditional users tend to be comfortable with the broad subject areas dealt with in television and radio news bulletins, such as regional news and country news. Those who use multiple online sources (mainly online and heavy multi-channel) are more likely to value niche areas such as entertainment as well as science and technology news – subjects that the internet is able to cover in far greater depth.

In our other segment, News Lovers are more interested in politics and business and financial news. In contrast, Daily Briefers and Casual Users are relatively more interested in local news, regional news, and health and education news.

Political news and political engagement

This year we have been able to ask detailed questions about political news in Germany and the United Kingdom and this offers the opportunity to compare the ways in which political news is found and consumed – as well as exploring levels of political participation online. Researchers are particularly interested in understanding these issues because a strong democracy is felt to depend on a high quality of information – where a range of views can be easily obtained and debated. So how do our two countries match up?

Figure 1.5d: Interest in politics – Germany vs UK



QS4a: How interested would you say you are in politics?
Base: UK (n=2078); Germany (n=1062)

Overall, interest in politics is significantly higher in Germany than in the United Kingdom. In Germany 54% of our sample say they are either extremely interested or very interested in politics, compared with just 33% in the UK. In addition, twice as many of our UK respondents (25%) said they were not very interested or not at all interested in politics compared with those in Germany (12%). The two countries have similar levels of internet penetration and age profiles and there were no significant elections during our survey.

Interest in political news

The degree of interest in political news varies considerably by age and gender. In general, men take a more active interest than women, and older people more than the young. This is particularly the case in Germany, but less so in the UK where younger people show interest in politics close to the average. There is no obvious enthusiasm for politics amongst older groups in the UK either.

In the UK, there is also some evidence from our survey of a low level of political interest among working-class voters – something that has been a long-standing concern of left of centre political parties. Among council tenants, only 26% had a high level of interest in politics, compared with 39% for those who owned their own homes.

Figure 1.5e: Interest in politics by age and gender

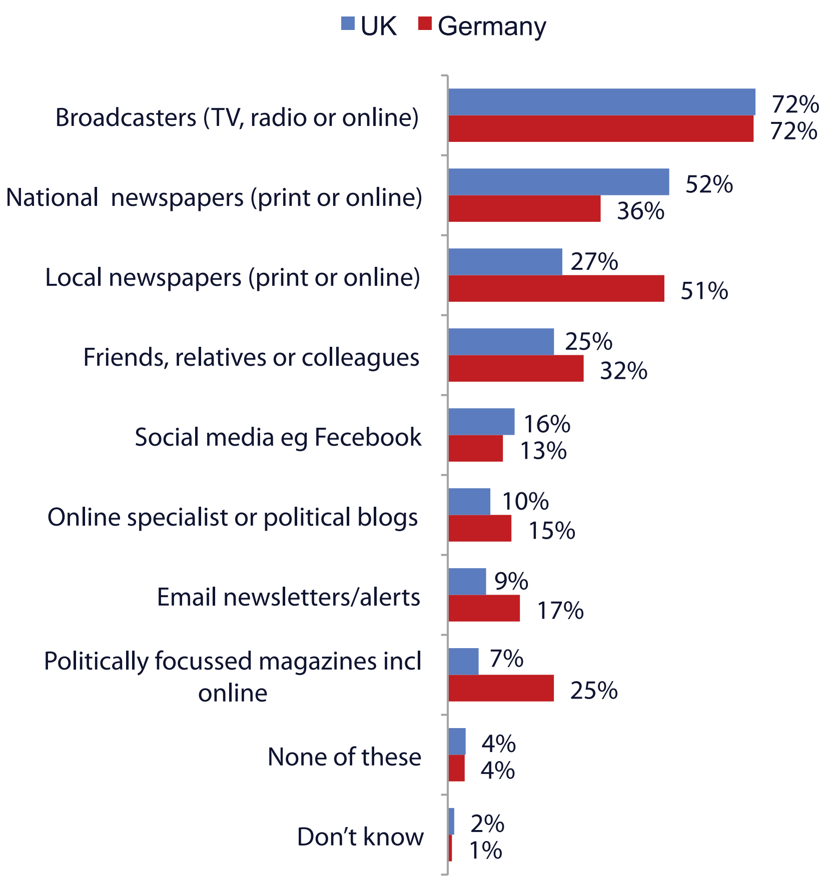
	All	Male	Female	18-24	25-34	35-44	45-54	55+
Germany	54%	65%	44%	37%	42%	50%	58%	63%
UK	33%	42%	24%	33%	28%	29%	32%	37%

QS4a: How interested would you say you are in politics?
Base: UK (n=2078); Germany (n=1062)

Sources of political news

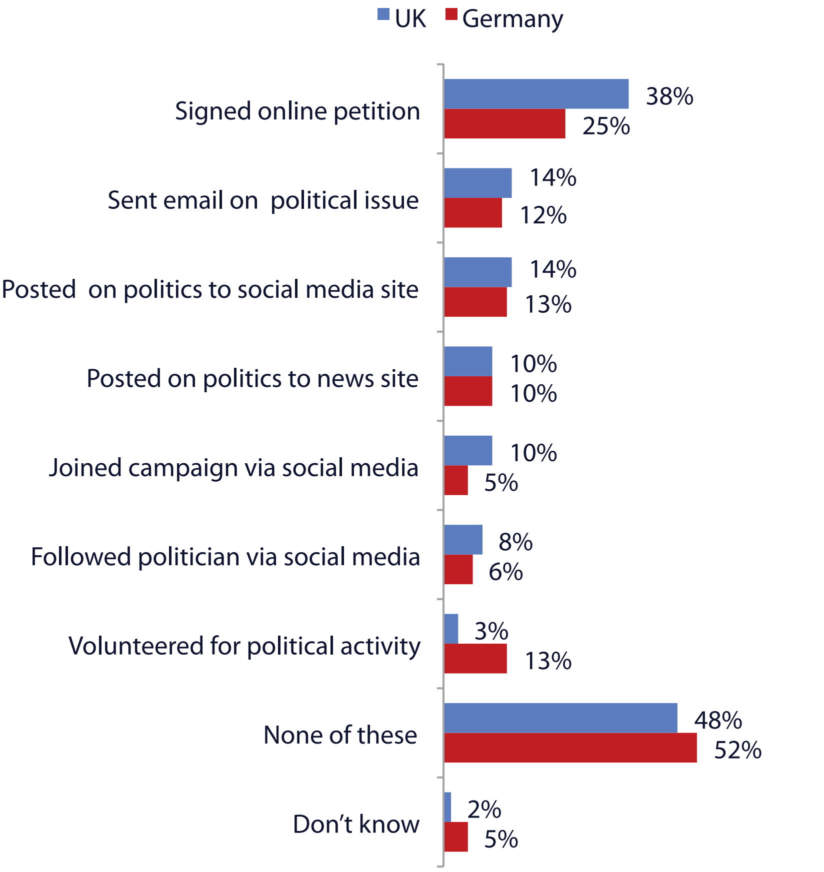
In both the UK and Germany, broadcasters (via TV, radio, and internet) are top sources of news. Reflecting the German federal model, local/regional newspapers are more important than in the UK where political power is much more centralised. Political magazines (e.g. *Focus*) are much more widely read in Germany than in the UK, where publications like the *New Statesman* and *The Spectator* tend to be reserved for narrow political elites and national newspapers tend to see their role as helping to set the political agenda.

Figure 1.5f: Sources of political news UK vs Germany



QS4b: Which, if any, of the following sources of information do you use to keep up with political and government issues?
Base: Interested in political news: UK (n=1924) Germany (n= 968)

Figure 1.5g: Online engagement and activism UK vs Germany



QS4c: In which, if any, of the following ways have you used the internet in the last year to get more involved in politics or express a political opinion? Please select all that apply
Base: Those interested in political news: UK (n=1924) Germany (n= 968)

Political engagement

Internet news users in the United Kingdom show slightly more willingness to engage online with political activities than their German counterparts despite a lower level of overall interest.

Figure 1.5h: Forms of online political engagement

Signing an online petition

	Germany	UK
All	25%	38%
18-24s	28%	46%
55+	24%	41%
Social Media users	35%	52%
Heavy Multichannel	47%	59%

Following a politician via social media

	Germany	UK
All	6%	8%
18-24s	17%	19%
55+	4%	3%
Social Media users	16%	26%
Heavy Multichannel	13%	27%

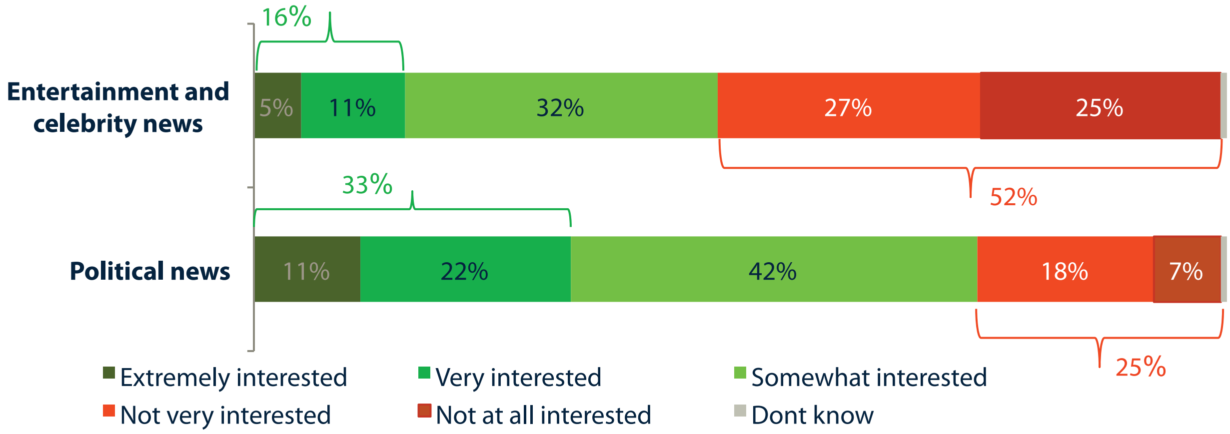
QS4c: In which, if any, of the following ways have you used the internet in the last year to get more involved in politics or express a political opinion? Please select all that apply
Base: Interested in political news: UK (n=1924) Germany (n= 968)

Although general levels of online engagement with politics are still relatively low, particular groups of users are adopting these new techniques more enthusiastically. Of those who are interested in political news (75% of the sample in the UK and 88% in Germany) at least a quarter had signed an online petition on politics in the past year. A small percentage were following a politician via social networks, but this rises to one in four social media users and heavy multi-channel users (see Figure 1.2c for explanation of this group). 18–24s are four times more likely to follow a politician via social media than the over 55s in Germany and six times as likely in the UK.

Entertainment news

One of the most striking findings from last year's survey was that the United Kingdom had the lowest level of interest in political news but the highest level of interest in entertainment and celebrity news. The UK stands out again in this respect in the 2013 survey (see Figure 1.5a) against all our countries apart from urban Brazil. This year we have drilled down in more detail to see what is driving these trends in the UK.

Figure 1.5i: Interest in entertainment vs political news in the UK



QS4a/QS5a: How interested would you say you are in politics news/entertainment and celebrity news?
Base: UK=2078

Political news is much more valued overall, but it is clear that entertainment news is much more polarised. People either love it or hate it. Interest is driven by women far more than by men and by the under 45s.

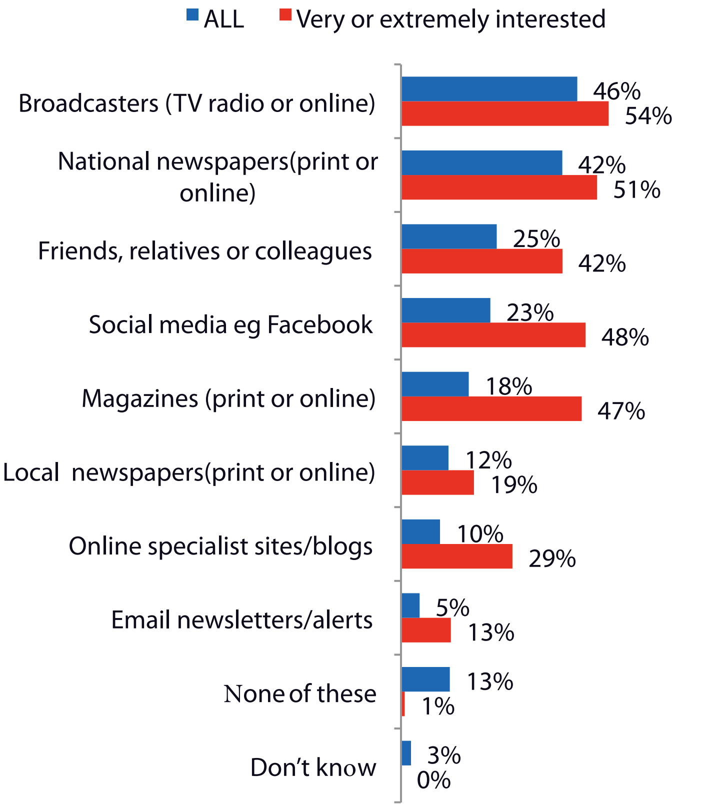
Figure 1.5j: Interest in entertainment news by age and gender

	Male	Female	18-24	25-34	35-44	45-54	55+
Very/extremely interested	10%	21%	21%	33%	22%	11%	5%

QS5a: How interested would you say you are in entertainment and celebrity news?
Base: UK=2078 , Extremely or very interested (n=323)

In terms of sources of entertainment news, national newspapers and their websites play a significant role and broadcasters a less significant role compared with other genres. For those with the strongest interest in the subject social media and celebrity-focused magazines are as important as national newspapers and broadcasters. There is also a significant role for online blogs and specialist sites like TMZ and Digital Spy. Together with the strong entertainment focus of sites like Mail Online, there is evidence that online is fuelling interest in this form of news, providing more entertainment news at a greater level of frequency than in a mainly analogue world.

Figure 1.5k: Sources for entertainment and celebrity news (UK)



TOP BRANDS
… for those interested in entertainment news

Offline
- Sun
- Star
- Metro

Online
- Mail Online
- Sun Online
- MSN

Specialist

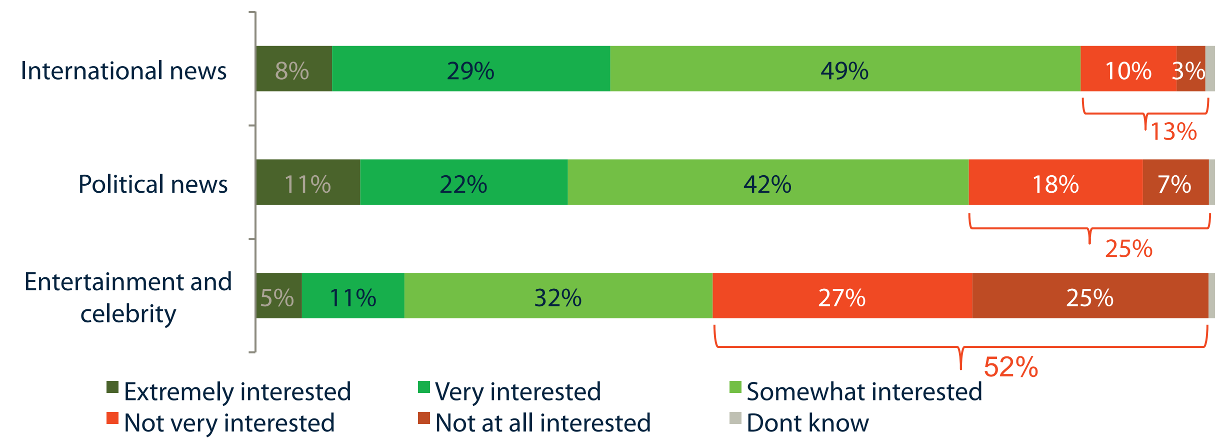
Digital Spy
Facebook

QS5b: Which, if any, of the following sources of information do you use to keep up with entertainment and celebrity news?
Base: ALL Interested in entertainment news:1528 Net very and extremely interested (n=323)

Interest in international news in the UK

International news has the smallest number of people who say they are not interested, compared with the other two categories. This may be because this category covers such a wide range of stories or because it is less socially acceptable to say you are not interested in events outside your own country.

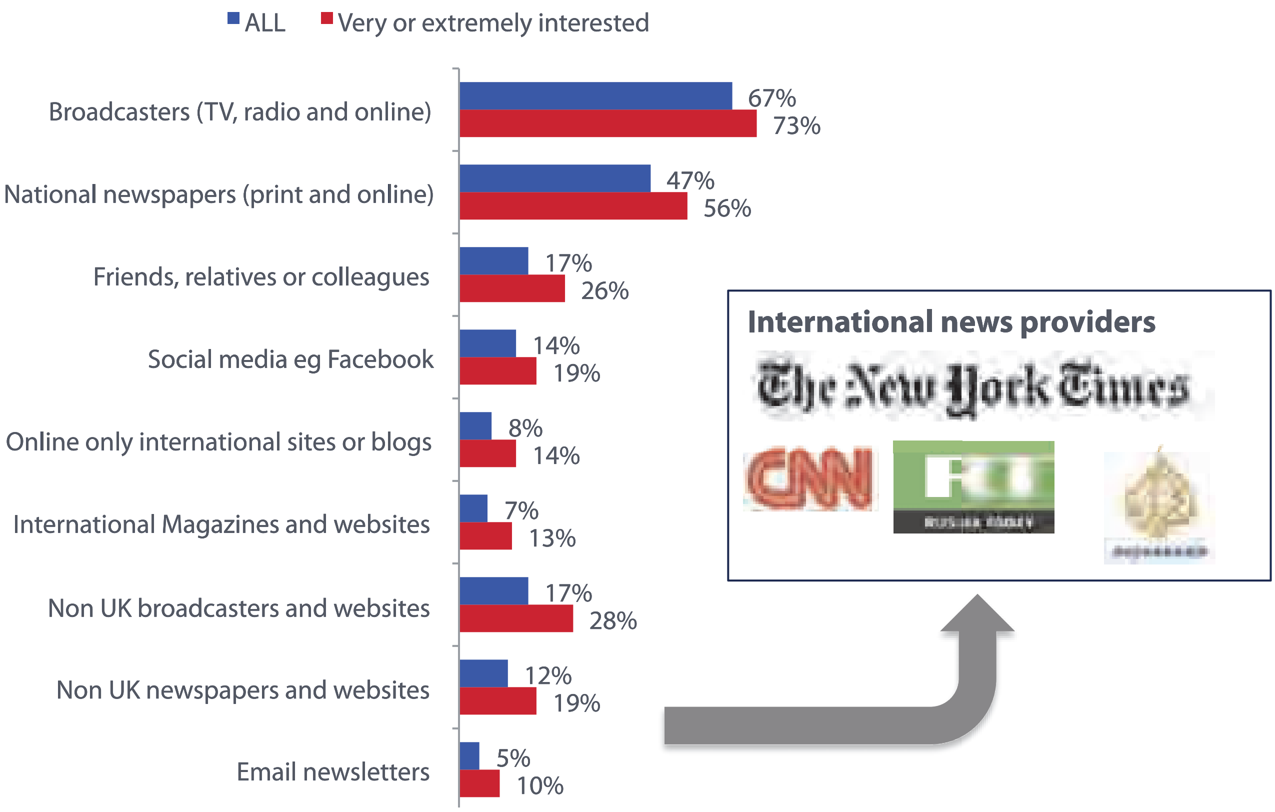
Figure: 1.5l: Interest in international vs political vs entertainment news



QS4a/5a/6a: How interested would you say you are in politics news/entertainment and celebrity news/international news?
Base: UK(n=2078)

In terms of sources for international news, one striking finding is how foreign broadcasters and newspapers have become an important part of the media mix in the UK, with a combination of multi-channel TV and the choice provided by the internet. This is particularly the case for those who are most interested in the subject.

Figure 1.5m: Sources for international news (UK)

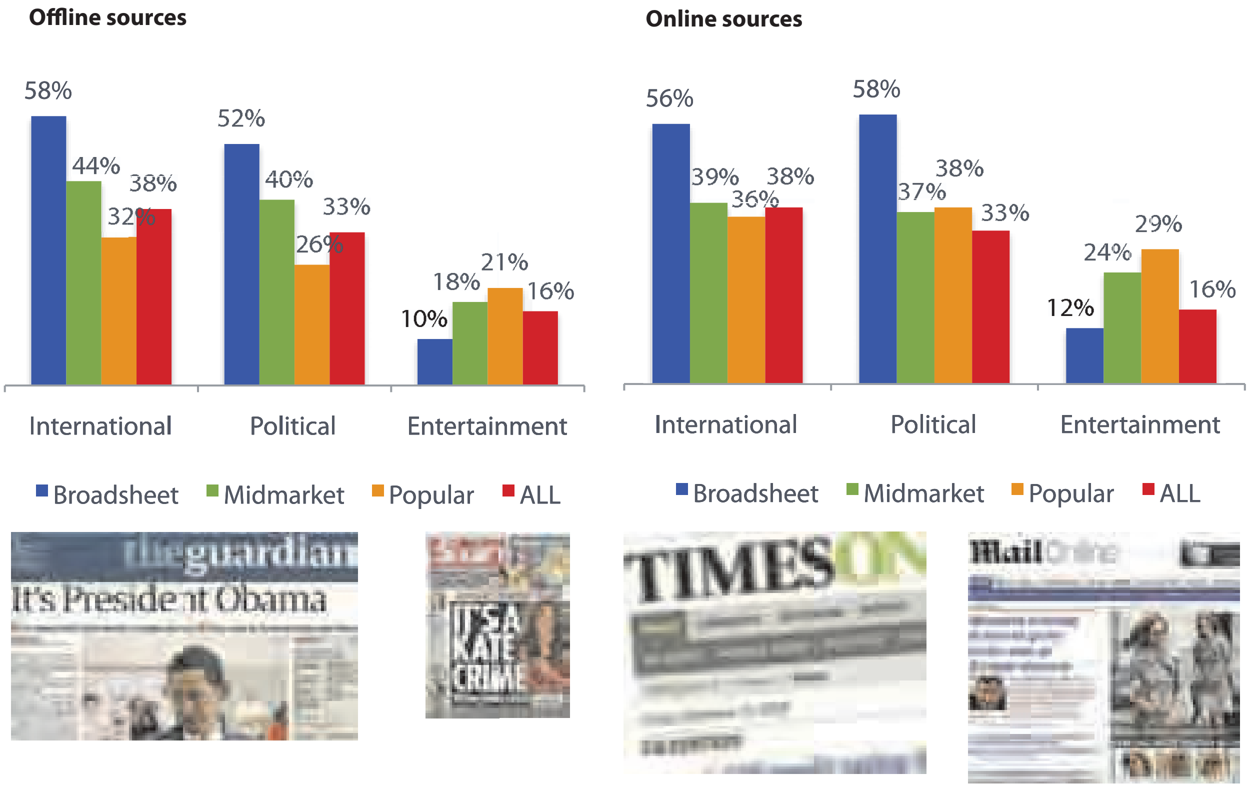


QS5b: Which, if any, of the following sources of information do you use to keep up with international news?
Base: Those Interested in international news (n=1998), Extremely and very interested (n=678)

Comparing the influence of UK newspapers on different types of news

There has been much written about the importance of UK newspapers in providing information and defining the agenda around subjects like politics and international news, together with a diet of scoops about the royal family and television celebrities. By looking at those most interested in these different types of news (see Figure 1.5n overleaf) we can see that newspapers in the UK have not lost influence in the move to online. Broadsheet newspapers, like *The Times*, the *Daily Telegraph*, and the *Guardian*, play if anything a more important role online where users tend to be more promiscuous and interested news users will often gravitate towards the most distinctive content. We see the same effect with entertainment news. In this case, though, the distinctive and exclusive content is produced by mid-market and popular newspapers and interested audiences are more likely to find this content than is the case offline.

Figure 1.5n: Interest in three categories of news by readers of different types of newspapers (UK)



QS4a/5a/6a: How interested would you say you are in politics news/entertainment and celebrity news/international news?
Base: UK (n=2078) ALL = all those net interested - very, extremely -, International (n=789) Politics (n=685), Entertainment (n=332), Broadsheet (n=570, 324), Midmarket (n=756, 349), Popular (n=623, 161)

1.6 Partiality and Polarisation of News

In most democratic countries, broadcast media have historically been required to adhere to strong standards of impartiality in news. This is because of the perceived power of television and the limitations in broadcast spectrum, which inevitably restricted competition. In contrast, newspapers have largely been allowed to follow a more partial news agenda, especially in opinion pieces and political reporting. But in the past decade, in the United States, a new breed of partial news channels such as Fox News have gained popularity and a number of senior media figures have suggested that rules on impartiality on television are now outdated.[10]

Our data indicate that there is still strong support for impartial news, particularly in countries with strong public service traditions (Japan, Germany, France, UK) but there are very different attitudes in Brazil, which has largely followed an American commercial model. The Germans (1%), French (4%), and Japanese (4%) in particular don't like news media – of any kind – to challenge their viewpoints, compared with people in Denmark, Brazil, and the UK.

Figure 1.6a: Preference for impartial news, compared with news that shares or challenges your point of view

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Share your point of view	19%	23%	31%	25%	18%	13%	24%	43%	15%
Have no particular point of view	70%	76%	58%	65%	78%	60%	68%	28%	81%
Challenge your view	10%	1%	11%	11%	4%	27%	8%	29%	4%

Q5c: Thinking about the different kinds of news available to you, do you prefer? (choice of statements)
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)
% agree

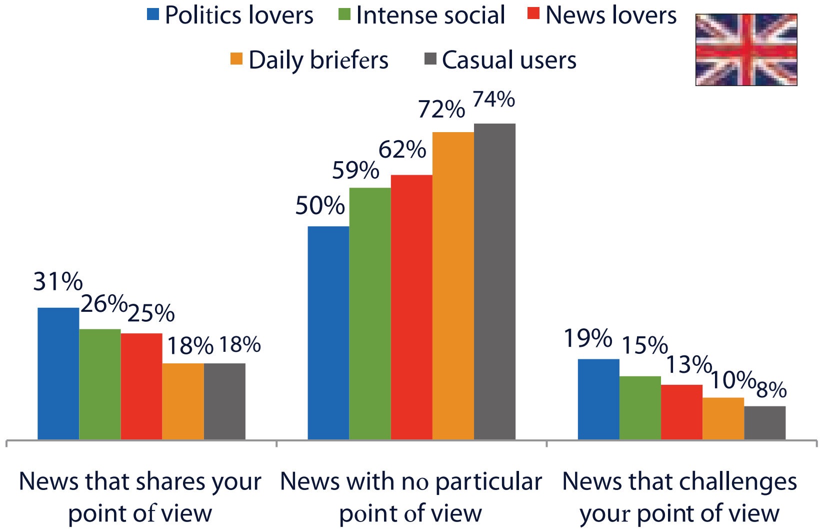
When analysing UK data, where we also have written comments where respondents explain their choices, it became clear that people who are very interested in the news find it hard to answer this question because they like impartial news AND a wider range of perspectives. Casual users are happier to default to one or two sources, which in the UK tends to be an impartial broadcast news source like the BBC.

People who are 'intense participators' (heavy and proactive users of social media channels) are no more likely to consume news that shares their point of view than people who are generally interested in news. If anything they are also slightly more likely to look for news that challenges their point of view. This tends to contradict the 'virtual echo chamber' theory[11] (at least in the UK), which suggests that digital and social media might lead people to take more entrenched views and miss out on a more balanced perspective.

See Essay: Paolo Mancini on whether digital news is contributing to a more polarised media system, p. 105

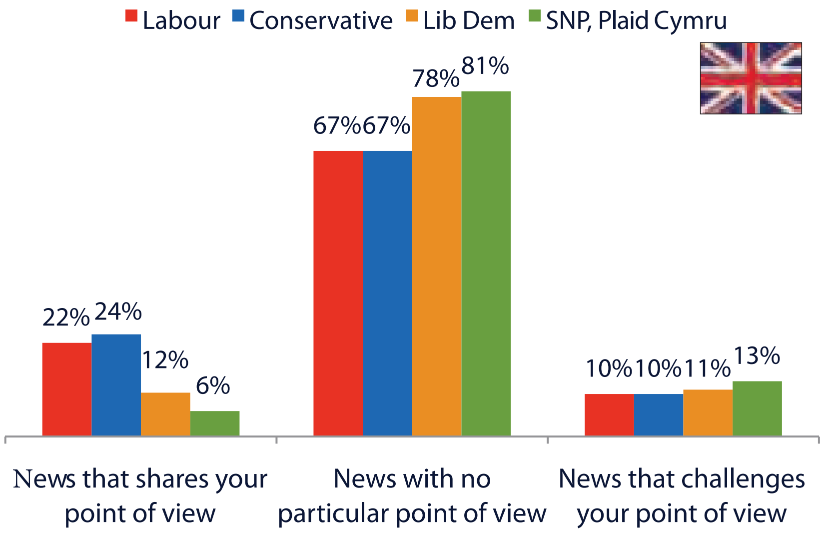
In the United Kingdom, the press tends to support one of the two main parties, Labour or the Conservatives. It is striking, but not surprising, that our data show that supporters of these parties are more likely to consume news that shares their point of view compared with supporters of smaller parties like the Liberal Democrats and nationalist parties in Wales and Scotland.

Figure 1.6b: Preference for impartial or partial news by segment (UK)



Q5c: Thinking about the different kinds of news available to you, do you prefer? (choice of statements)
Base: UK (n=2078), News Lovers (n=448) Daily Briefers (n= 1059), Casual Users (n=572) Intense participators (n=201), Extremely interested in politics (n=227)

Figure 1.6c: Preference for impartial or partial news by political party allegiance



Q5c: Thinking about the different kinds of news available to you, do you prefer? (choice of statements)
Base: (UK=2078)
% agree

[10] www.guardian.co.uk/media/2010/dec/17/mark-thompson-bbc-fox-news. See R. Sambrook, *Delivering Trust: Impartiality and Objectivity in the Digital Age* (RISJ, 2012) for a discussion of the issue.
[11] First proposed by Professor Cass Sunstein in 2001.

Section 2. Paying For News

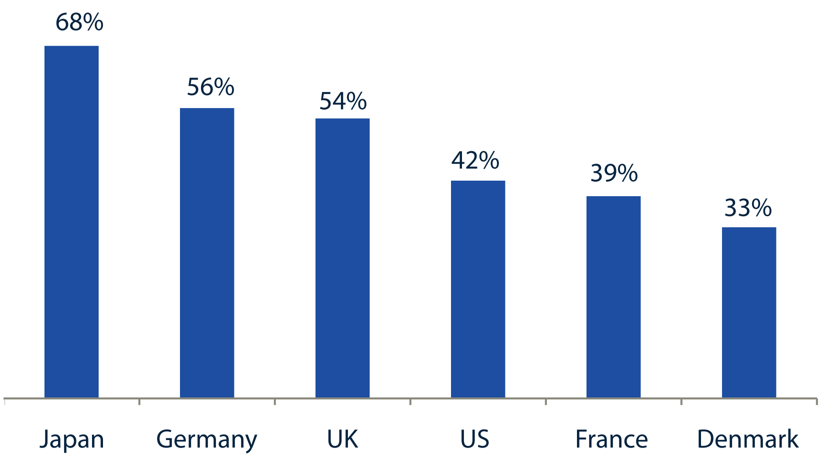
2.1 Newspaper Purchase across Countries

This is the first year we have collected data on newspaper purchase so the most interesting findings are around the differences between our surveyed countries. We have removed Italy, Spain, and Brazil because the relatively low levels of internet penetration are likely to lead to misleading results when measuring an offline activity. The remaining results are broadly in line with officially published readership figures in these countries, which also see Japan topping the league for newspaper purchase.

Denmark and France are least likely to have paid for a printed newspaper. In the case of Denmark this is partly due to substitution with free newspapers and online. Paid newspaper circulation has halved in the past 15 years in Denmark.[12] In France, paid newspaper circulation has been historically lower without the mass market 'tabloid' papers found in countries like Germany and the United Kingdom. On the other hand, France does have a number of successful free newspapers like *20 Minutes*, *DirectMatin-Plus,* and *Metro*.

When looking at where people buy newspapers (see Figure 2.1b overleaf), Italy, Spain, UK, and urban Brazil are more likely to use a news stand or shop. In Germany, Denmark, US, and Japan home delivery is more prevalent – suggesting that newspapers may be able to build further on a continuing relationship with customers in digital or print. It is no coincidence that Germany and Japan, which have seen the most resilience in newspaper sales, are the countries with the highest level of home delivery (a proxy for a subscription relationship).

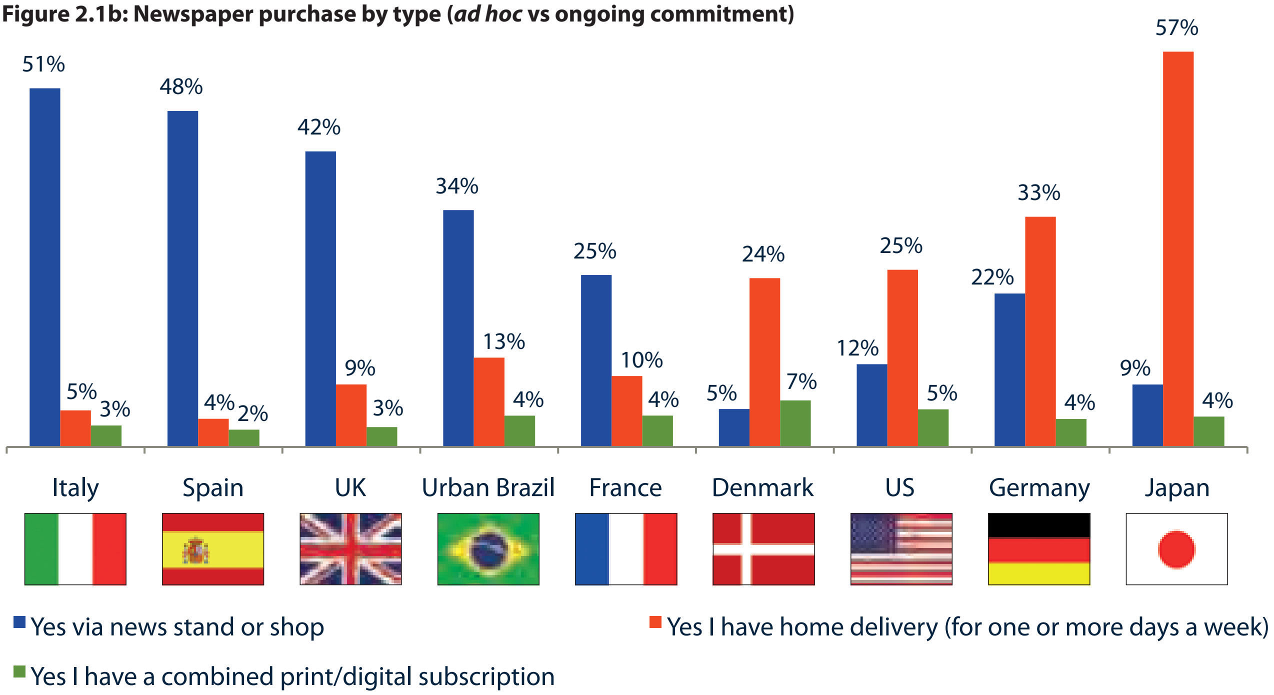
Figure 2.1a: Weekly newspaper purchase by country



Q6: Have you bought (paid for) a printed newspaper in the last week?
Base: All markets UK (n=2078) US (n=2028)) Japan (n=978) Germany (n=1062) France (n=973) Denmark (n=1007)

[12] www.newspaperinnovation.com/index.php/category/circulation.

Figure 2.1b: Newspaper purchase by type (*ad hoc* vs ongoing commitment)



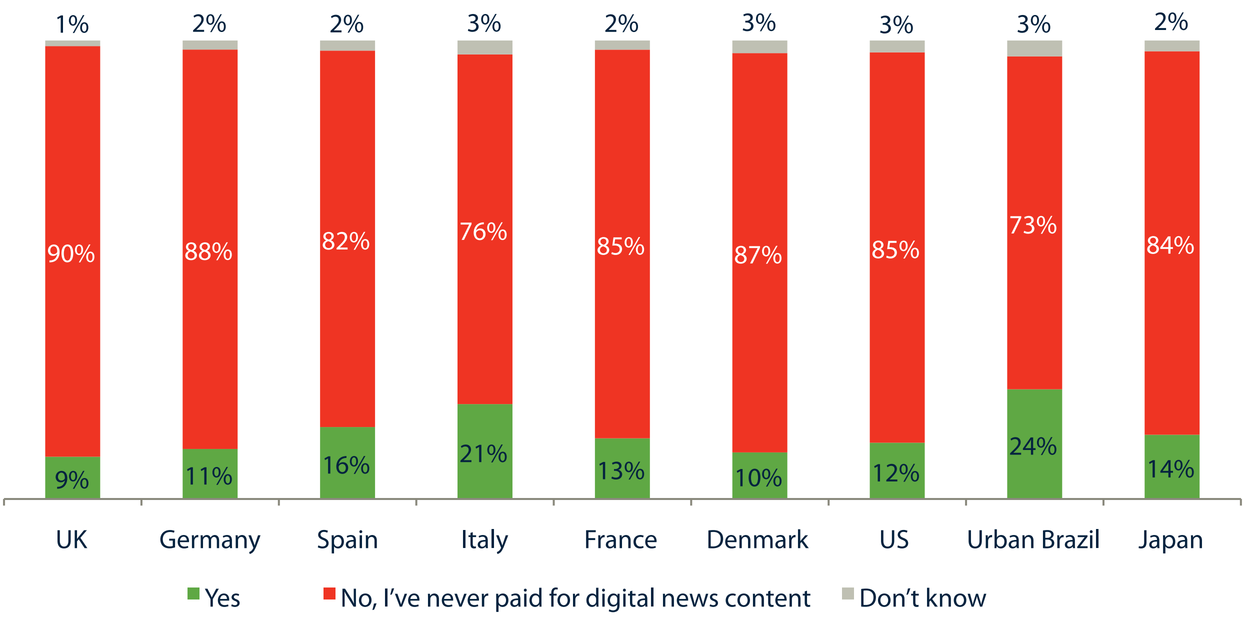
Q6 : Have you bought (paid for) a printed newspaper in the last week? (Multiple answers allowed.)
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

2.2 Paying for Digital News

Whilst 50% of our global sample said they had bought a printed newspaper in the last week, only 5% said they had paid for digital news in the same time period. This is partly because the majority of online newspapers still do not charge for news – although that is changing rapidly with the erection of paywalls, combined subscriptions, and app-based purchases. In the UK, we have seen a significant jump in the percentage paying for news since our last survey – from 4% to 9% paying for some kind of digital news in the last year.

There are marked differences with countries where populations were late adopters of online services or in which the legacy of free online news provision is less pronounced. The highest rates of paying for digital news are thus seen in Brazil, Italy, Spain, Japan, and France.

Figure 2.2a: Number paying for digital news in last year



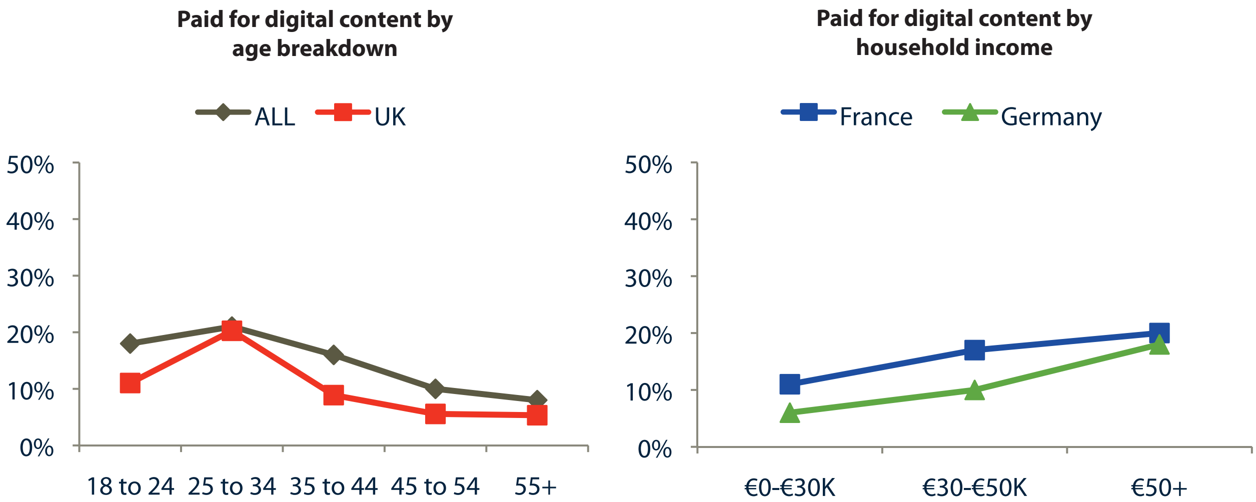
Q7: Have you paid for DIGITAL news content, or accessed a paid for digital news service?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

In terms of who is prepared to pay for digital news, older groups are most reluctant to pay for digital news, with 25–34 year olds the most willing to do so across all of our countries (see Figure 2.2b below).

We also see an income effect (illustrated in France and Germany), with those households earning over €50K p.a. around twice as likely to pay as those earning less than €30K a year.

In the UK, among those with a personal income of £25K to £50K, a quarter are 25 to 34, suggesting that this age group is more affluent and therefore willing to pay for digital content.

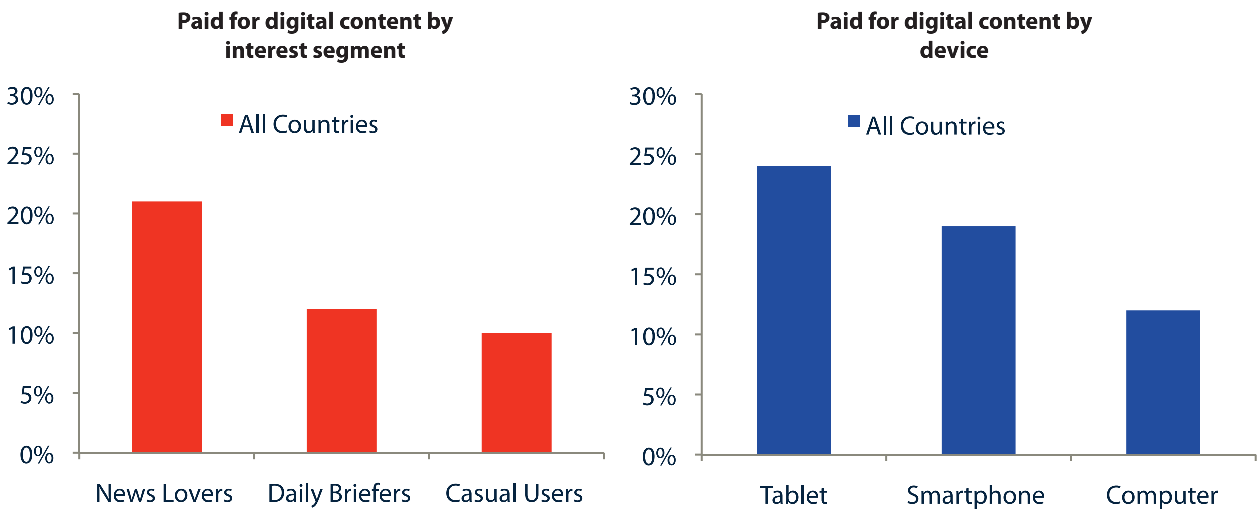
Figure2.2b: Who is paying for digital news?



Q7: Have you paid for DIGITAL news content, or accessed a paid for digital news service?
Base: UK 18 to 24 (n=269) 25 to 34: (n=286) 35 to 44: (n=321) 45 to 54 (n=383) 55+ (n=819)
0 to €30k France, Germany(n=487,364) €25 to €50k (n=287,230) €50k+(n=100,226)
Chart shows % yes

Two other important factors relate to interest in news and device ownership. Our News Lover segment is twice as likely to pay as either Daily Briefers or Casual Users. Tablet owners are twice as likely to pay as computer users, but much of this difference is likely to relate to higher personal and household income of this group and their greater interest in news.

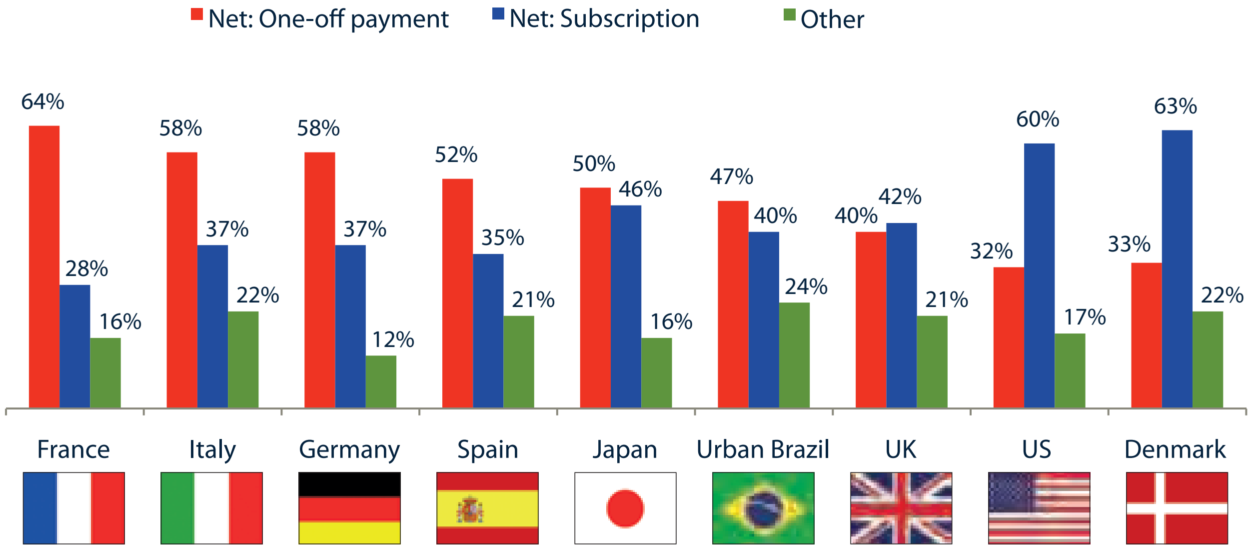
Figure 2.2c: Impact of interest in news and device to access news



Q7: Have you paid for DIGITAL news content, or accessed a paid for digital news service?
Base: All Countries (n=11004) News Lovers (n=2565) Daily Briefers: (n=5968) Casual Users: (n=2471) Tablet users (n=1639) Smartphone users (n=3156) Computer users (n=7444)
Chart shows % yes in last year

Types of digital payment
Notable differences in patterns of payment are evident across nations, with distinct differences appearing between nations where one-day or single-article, or single-app purchase is predominant (Spain, Italy, France) and those where subscriptions to digital news are more common (US, Denmark).

Figure 2.2d: Types of digital payment by country

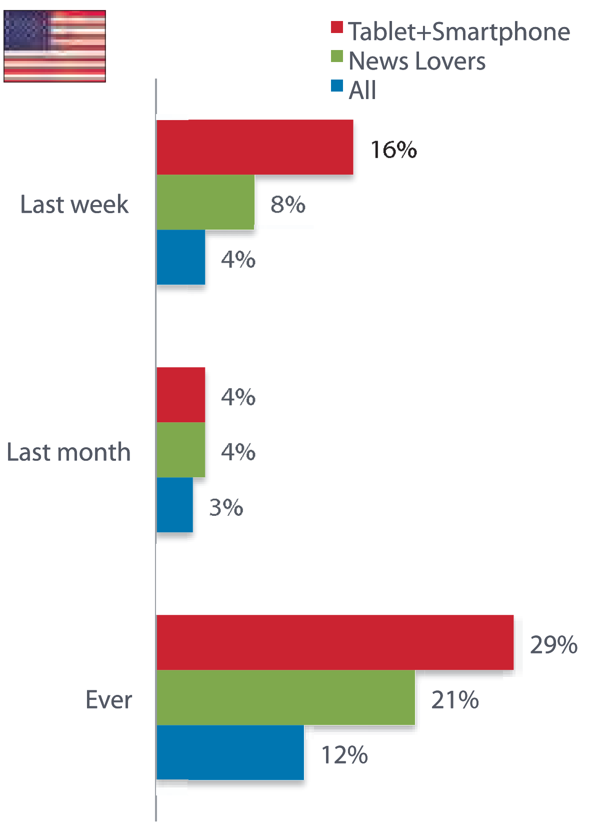


Q7a: You said you have accessed paid for digital news content in the last year, which, if any, of the following types of payment have you used?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

The most popular type of one-off payment in all countries is for downloading and using an app or making an in-app purchase. In France, Spain, and Italy, around one-third of those who said they paid for news made an app purchase in the last year. The figures were slightly lower in the US, UK, and Denmark, perhaps because a number of news publishers have moved to making apps an ongoing subscription payment or part of a print/subscription bundle.

Looking specifically at those who use both tablets and smartphones in the United States, we can see this group is four times more likely to pay than the average American in our sample. They are also twice as likely to pay as News Lovers (Figure 2.2e).

Figure 2.2e: Paying for news by device and by interest – the US



Q7: Have you paid for DIGITAL news content, or accessed a paid for digital news service?
Base: (US=2028) Tablet and Smartphone users US (n=187) News Lovers US (n=557), iPhone (n=277) Other smartphone (n=337), iPad (n=206), Other tablet (n=149)

Testing for the impact of platform on payment

These differences could be explained by device functionality and the eco-system of paid news that has grown up around these devices or they could relate the fact that smartphone and tablet owners tend to come from higher incomes and have a higher interest in news. To explore this further, we identified a number of demographic characteristics such as gender, age, education and income that may play a role in influencing a person's likelihood to pay for news. By taking these variables into account, along with the interest in the news, we can include them in a regression model and 'control' for their relationship with device usage and paying for news. Figure 2.2f summarises the results which show that in the United States, these devices are significantly encouraging payment for news when controlling for these factors. It also suggests that users of Apple devices are more likely to pay than those who use other smartphones and tablets. Users of iPads are 147% more likely to pay for news and iPhone users are 77% more likely to pay.

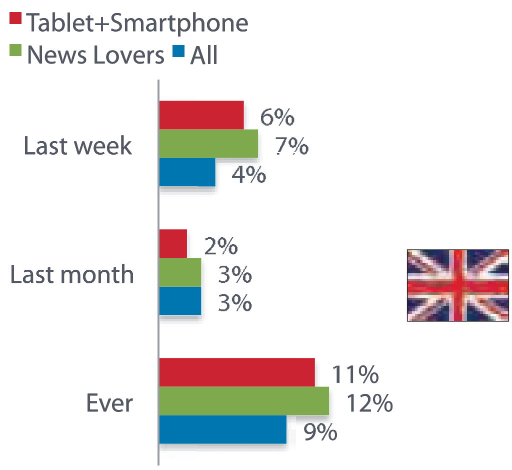
Figure 2.2f: Impact of device after controlling for demographic and usage factors US

	Apple iPad	Other tablet	iPhone	Other smartphone
Paid for digital news in last year	+147%	+75%	+77%	+54%

Q7: Have you paid for DIGITAL news content, or accessed a paid for digital news service?
Base: (US=2028)
% difference compared with general digital users after controlling for gender, age, education level, income and interest in news

In the United Kingdom, we do not see quite such a pronounced effect. Smartphone and tablet users are only a little more likely to pay for news than online news users. And when running our model, controlling for demographic variables, we do not find any statistically significant positive correlation with device. This may relate to the lower levels of payment in the UK generally and to the fact that some of the most popular news apps (BBC, Sky and Metro) are provided free.

Figure 2.2g: Paying for news by device and by interest – the UK

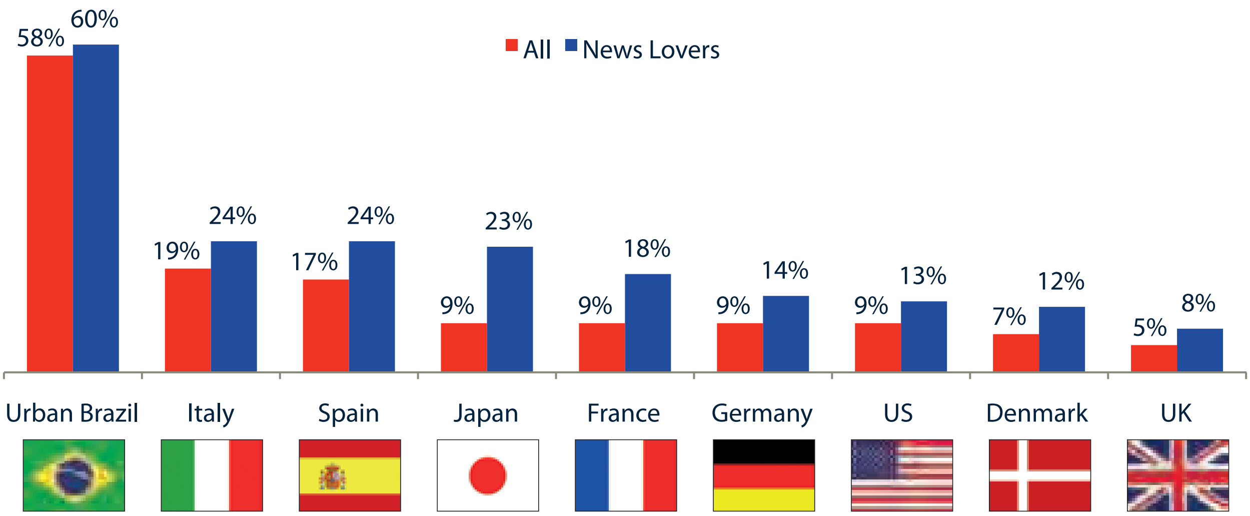


Q7: Have you paid for DIGITAL news content, or accessed a paid for digital news service?
Base: (UK=2078) Tablet and Smartphone users (n=143) News Lovers (n=448)

For those who aren't currently paying for digital news, a significant percentage expects to pay at some point in the future. Urban Brazil has the highest willingness to pay in the future but consumers in Italy and Spain show more willingness than Northern European countries. News Lovers (around 20% of the sample in most countries) are much more likely to pay. Men say they are much more likely pay than women.

See Essay: Robert G. Picard asks whether consumers will eventually pay for digital news, p. 89

Figure 2.2h: Likelihood to pay for digital news in the future by country



Q7b: You said you have not paid for digital content in the last year, how likely or unlikely would you be to pay IN THE FUTURE for online news from particular sources that you like?

Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

Chart shows net very likely or somewhat likely

Section 3. Online News In Detail

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

3.1 The Growth of Multi-Platform News

Devices for accessing the news and the impact of tablets and smartphones

Overall we find that more people are accessing news through a greater number of devices than ever before. The computer remains the most important device for online news, but for many this is now supplemented by heavy usage of smartphones and tablets. Across all our countries 46% of our sample use a smartphone and 31% say they used the device for news at least once in the past week. One in four (25%) use a tablet, with 16% on average using it for news. In countries like the UK, tablet usage for news has doubled in 10 months.

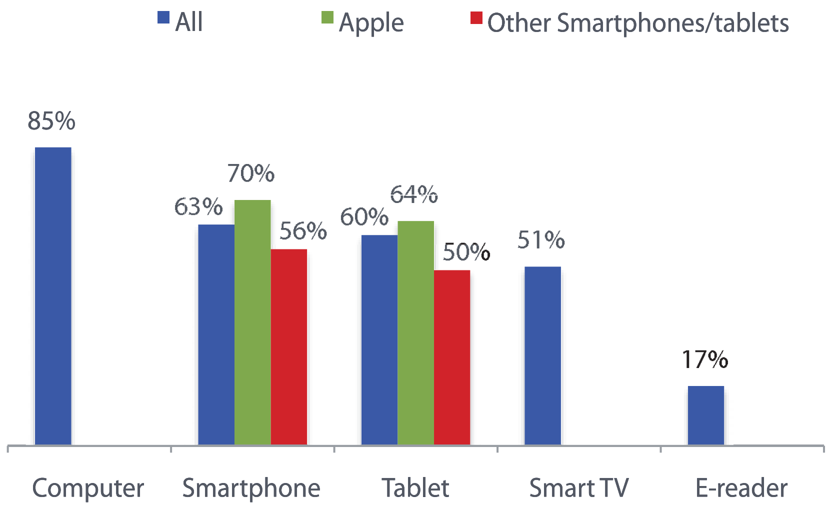
Denmark has the highest weekly news usage of smartphones at 43%, with Japan showing the lowest level at 19% – though this is largely because it also provides mobile access to the internet via platforms such as iMode which are still dominated by feature phones. In terms of European countries, we see France and Germany showing the lowest level of online news access via tablets and smartphones.

Figure 3.1a: Online news access by device by country

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Computer	67%	71%	56%	58%	50%	58%	71%	81%	68%
Smartphone	29%	22%	35%	25%	24%	43%	28%	23%	19%
Tablet	16%	10%	13%	14%	11%	25%	16%	14%	6%
E-book reader	2%	1%	2%	1%	1%	1%	2%	4%	1%
Smart TV	3%	5%	10%	10%	9%	7%	4%	12%	4%

Q8b: Which, if any, of the following devices have you used to access news in the last week?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)
NOTE: Data has been rebased to account for the total sample size but is not an accurate indication of ownership levels and will not be wholly comparable with last year.

Figure 3.1b: Most important devices for news – weekly percentage use

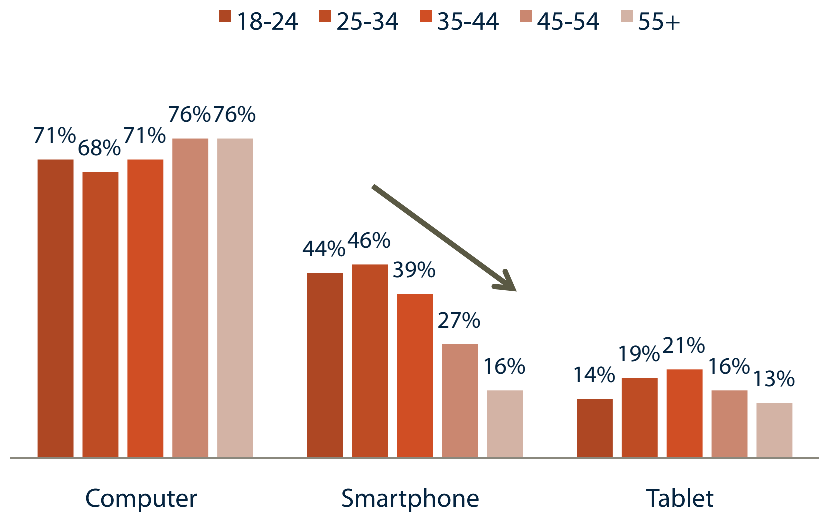


Q8a/Q8b: Which, if any, of the following devices have you ever used/have you used to access news in the last week?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

The laptop or desktop remains the most important single device for accessing news but smartphones and tablets are not far behind in terms of the proportion of users accessing news each week. E-readers are used far less for news content, even though a number of publishers have created digital editions for them. Connected televisions, which have access to text and video on-demand services in a number of countries, are becoming increasingly popular, although the definition and use for news is hard to explain with a survey.

Apple devices in particular are more heavily used for news than those running other operating systems. This will be related to the slightly more upmarket demographics for these devices but also because of the wide availability and promotion of news apps and mobile websites for this platform. In general, however, Apple devices are now a minority in most countries, particularly in Spain and Brazil where Android and Blackberry are far more popular. In Northern Europe and the United States the iPad remains the dominant tablet for news, particularly in Denmark where it outperforms other manufacturers by a ratio of more than four to one.

Figure 3.1c: Accessing news per device by age (all countries)



Q8a /Q8b: Which, if any, of the following devices do you ever use?/ have you used to access news in the last week?
Base: Those who use a digital device for any purpose (n=10182)

Demographic effects of different devices

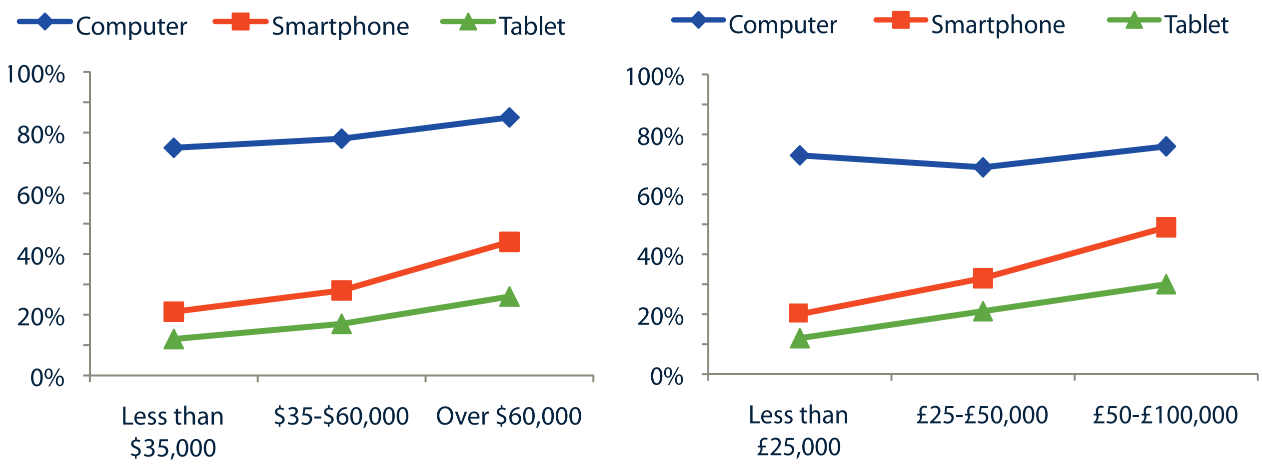
Smartphone news usage across all our countries is heavily focused on the under 45s. Older groups are largely sticking with computers. In terms of age, tablets show a more even spread, with a significant bulge with the 25–44 age group.

[13] In fact slightly over one-third, at 39%

Tablet and smartphone news users are generally to be found in higher education and income brackets, which may explain the greater interest in news. In the United States, the richest one-third of our sample[13] – earning over $60,000 – account for 60% of smartphone news usage, 53% of tablet news usage, and 40% of computer news usage. In the UK we also see smartphones showing a bigger income effect than tablets, whereas computer news use is spread relatively equally across income.

Figure 3.1d: Accessing news per device by household income

United States **United Kingdom**



Q8b: Which, if any, of the following devices have you used to access news in the last week?
Base: US Computer (n=1515) Smartphone (n=594), Tablet (n=337) Household income 0-$35K (n=579), $35-$60K (n=426), $60K+ (n=598)
UK Computer (n=1394), Smartphone (n=612), Tablet (n=340) Household income 0-25K (n=585), £25-£50K (n=560), £50-£100K (n=245)

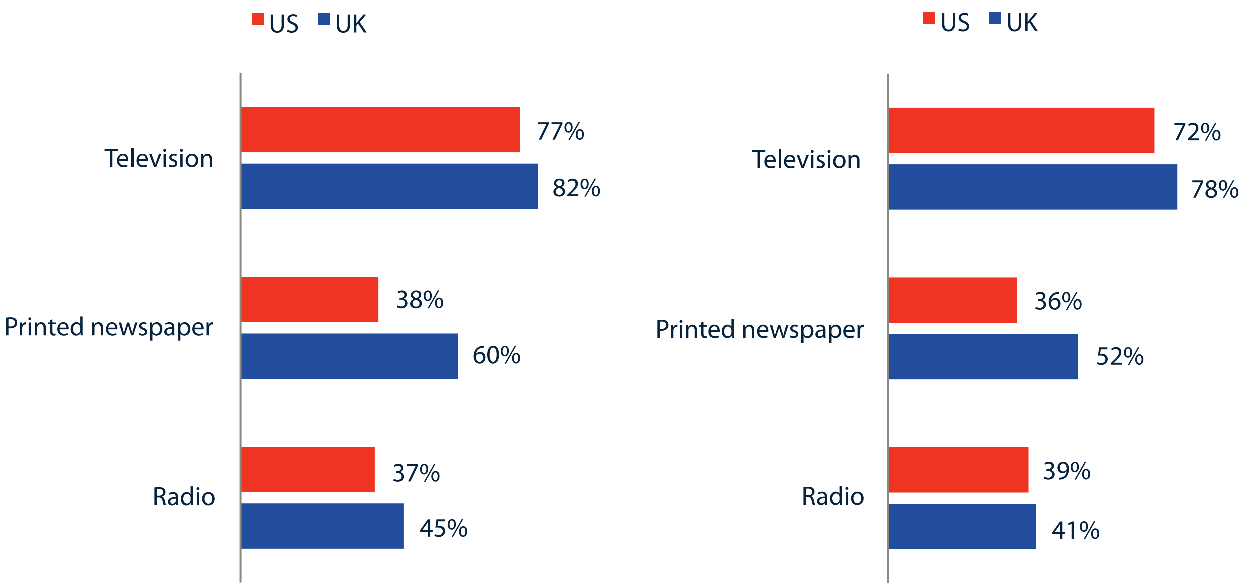
Multi-platform usage extends options

The growth of smartphones and tablets has not generally come at the expense of other media, but is instead increasing the range of options. Looking at tablet owners in the United States and the UK, for example, around four out of five continue to access news on television, with a healthy number still reading printed newspapers each week.

There is some evidence of substitution of print in the United States where the average use by tablet users (37%) and smartphone users (36%) is considerably less than the sample average (49%). In the United Kingdom, however, tablet users are just as likely to read a printed newspaper as the average (57%).

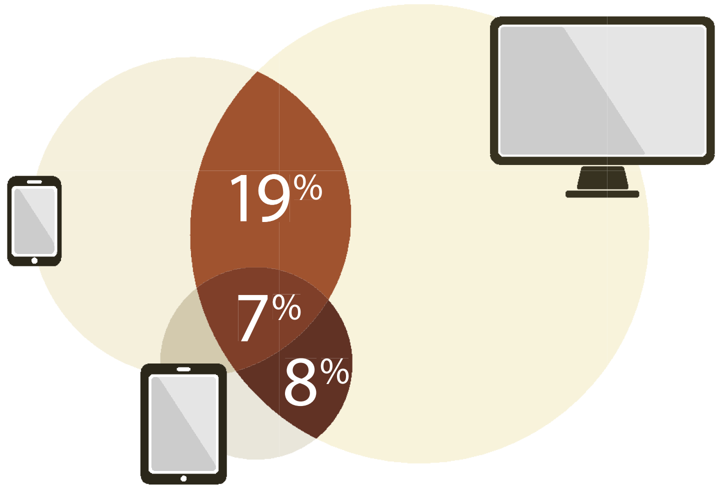
Figure 3.1e: Other news sources accessed by tablet and smartphone users

Tablet users also get news from... **Smartphone users also get news from...**



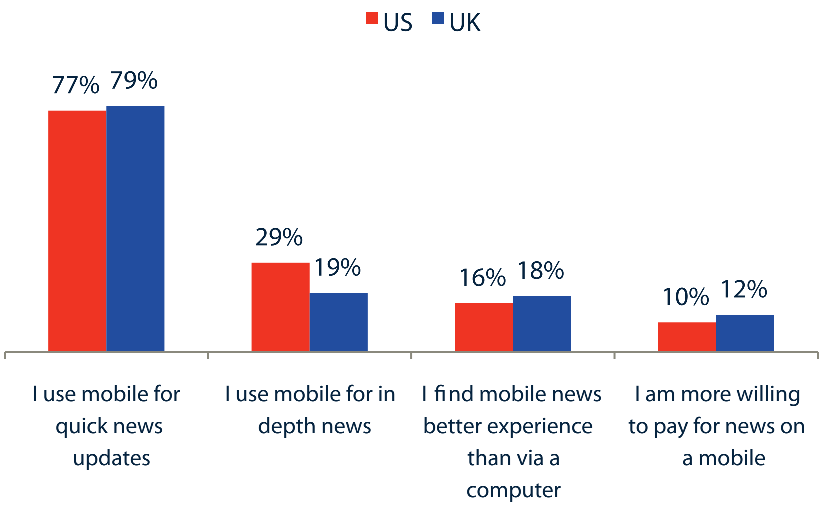
Q3: Which, if any, of the following have you used in the last week as a source of news?
Base: UK (n=2078) US (n=2028) Tablet users UK (n=340) US (n=337) Smartphone users UK (n=612) US (n=594)

Figure 3.1f: Device overlaps (all countries)



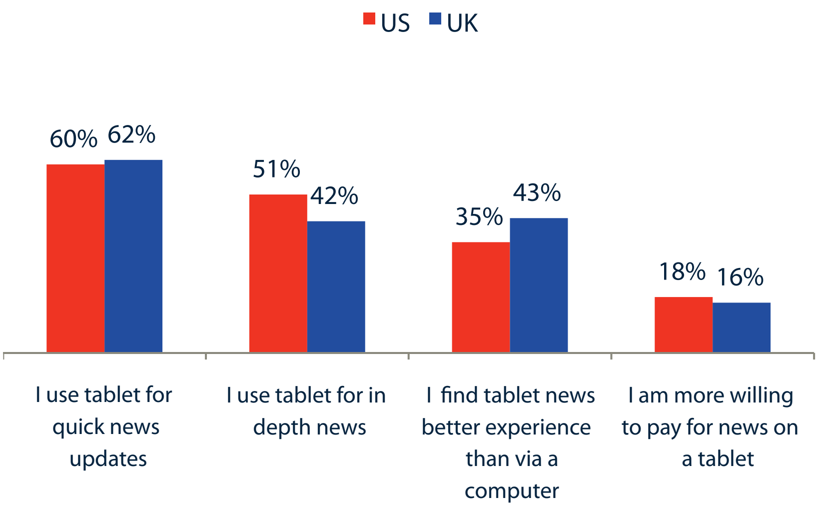
Base: All those who have used computers, tablets or smartphones for news in the past week

Figure 3.1g: Mobile phone preferences (US and UK)



QS7a/b: You've told us that you read news on a MOBILE/TABLET, with that in mind, please could you tell us how much you agree or disagree with the following statements.
Base US : Read news on a mobile (n=583); Read news on a tablet (n=329) Base UK Base: Read news on a mobile (n=585); Read news on a tablet (n=331)

Figure 3.1h: Tablet preferences (US and UK)



QS7a/b: You've told us that you read news on a MOBILE/TABLET, with that in mind, please could you tell us how much you agree or disagree with the following statements.
Base US : Read news on a mobile (n=583); Read news on a tablet (n=329) Base UK Base: Read news on a mobile (n=585); Read news on a tablet (n=331)

Looking specifically at those who use online news across all our sampled countries we can see that a quarter of our sample (26%) accesses news on a computer and a smartphone each week. There are also strong overlaps between the computer and the tablet (15%), while a growing number of people (7%) say they access news on all three devices on a weekly basis.

Smartphone usage increases frequency but not depth

Our data show that mobile phones are used more frequently for accessing quick news updates during the day (79% net agree in the UK and 77% in the US), with only a small proportion agreeing that the mobile is frequently accessed for in-depth news. Tablets on the other hand (see Figure 3.1h) are valued for quick updates and in-depth news. Fewer than one in five mobile phone users agree that the experience is better than a PC – not surprising given the small screen size and often poorly formatted content. The advantages are more around convenience than experience (see Figure 3.1g).

On a tablet, a significant proportion (43% in the UK) agree that the experience – which often includes optimised touch and swipe interfaces – is better than a computer. Tablet users are also more likely to pay for news than smartphone users.

These preference statements are supported by quantitative data that show both smartphone and tablet users access news more frequently than those using computers. The more devices people access, the more frequently they access news. On the other hand these devices are used for many other things, such as email and social networking – so the scope for distraction is inevitably greater than that with traditional platforms like a printed newspaper. Average time spent on news with a tablet is lower than for a computer and considerably lower for a smartphone.

Figure 3.1i: Frequency of access grows with devices

United States

Device	Several times a day
ALL News users	56%
Computer	65%
Smartphone	76%
Tablet	77%
Tablet and smartphone	90%

Denmark

Device	Several times a day
ALL News users	76%
Computer	79%
Smartphone	83%
Tablet	84%
Tablet and smartphone	93%

Q1b: Typically, how often do you access news (in any way).
Base: US (n=2028) Denmark (n=1007)

3.2 Type of News Accessed Online

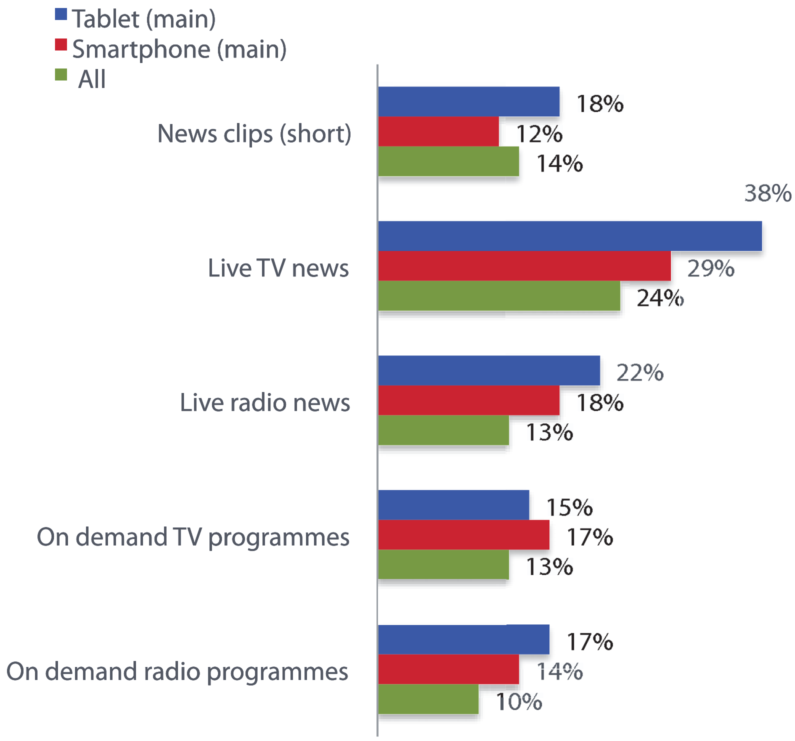
In terms of online content in general we can see articles and story lists (e.g. a news front page) remain the most accessed on a weekly basis. Some countries seem to have taken faster to video and audio news content, in particular the United States, Spain, and Brazil. Pictures and graphics are also popular in Japan, Germany, Italy, and Spain.

Figure 3.2a: Types of online news content accessed by country

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Lists, articles and blogs	52%	58%	63%	71%	46%	58%	64%	66%	67%
Video and audio	47%	43%	52%	48%	48%	39%	55%	64%	35%
Live pages	11%	8%	16%	16%	19%	8%	11%	15%	35%
Pictures and graphics	15%	24%	21%	23%	15%	16%	23%	32%	27%
Apps	19%	13%	24%	17%	17%	25%	19%	20%	13%
Other	1%	0%	2%	1%	2%	1%	2%	3%	0%
None of these	15%	17%	7%	6%	14%	13%	4%	4%	8%

Q11: Thinking of the way you looked at news online in the last week, which of the following ways of consuming news did you use?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

Figure 3.2b: Type of video and audio content consumed in last week (UK

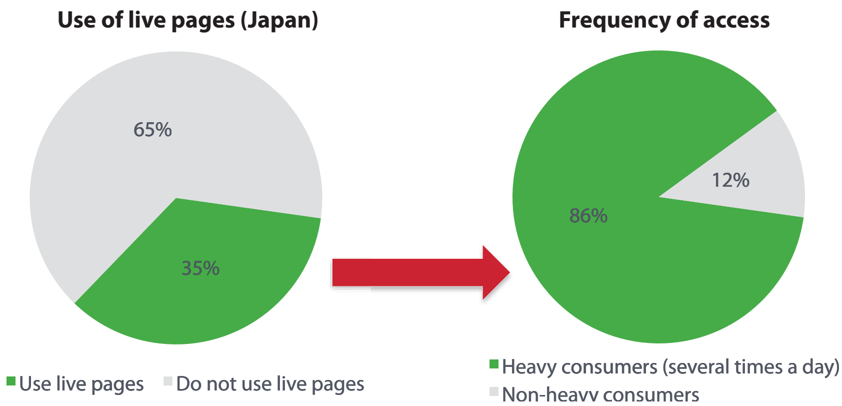


Q11: Thinking of the way you looked at news online in the last week, which of the following ways of consuming news did you use?
Aggregated lists from a longer set
Base: UK (n=2078) Main smartphone (n=152), Main tablet (n=89)

Video usage of short news clips on news websites is still relatively low at just 14% in the UK, but watching live news video seems to be on the increase, at 24% compared with 18% last year. The tablet, which is often marketed for its multimedia capabilities seems to be encouraging more video consumption in particular, with 38% watching a live TV news channel or live video news feed in the past week.

Over the past year, video has increasingly been a component of live pages, for example, in the coverage of the Leveson Inquiry in the UK and the 2012 Olympics in a number of countries. Video is often combined with live updates in chronological order and comments and pictures from social media sites. These 'Live Pages' have become a feature of many news sites and this 'web native' format has become an attractive alternative to an article when covering a breaking news story. Live pages are particularly popular in Japan, where the biggest news site, Yahoo, regularly covers breaking news in this way, and also in France.

Figure 3.2c: Use of live pages (Japan)



Q11: Thinking of the way you looked at news online in the last week, which of the following ways of consuming news did you use?
Base: Japan (n=979) ; Use live pages (n= 341) Access several times day (n=784)

Live pages are accessed most heavily on a computer at work and by those who are most interested in news.

See Essay: Neil Thurman, 'How Live Blogs Are Reconfiguring Breaking News', p. 85

3.3 Online News Sources

Whilst TV, radio, and print remain largely the preserve of traditional news organisations, the online sphere has opened up huge new competition. Lower barriers to entry and the ability to operate across national boundaries has encouraged the growth of new players like Yahoo, Google News, and the Huffington Post (which now operates in five European countries).

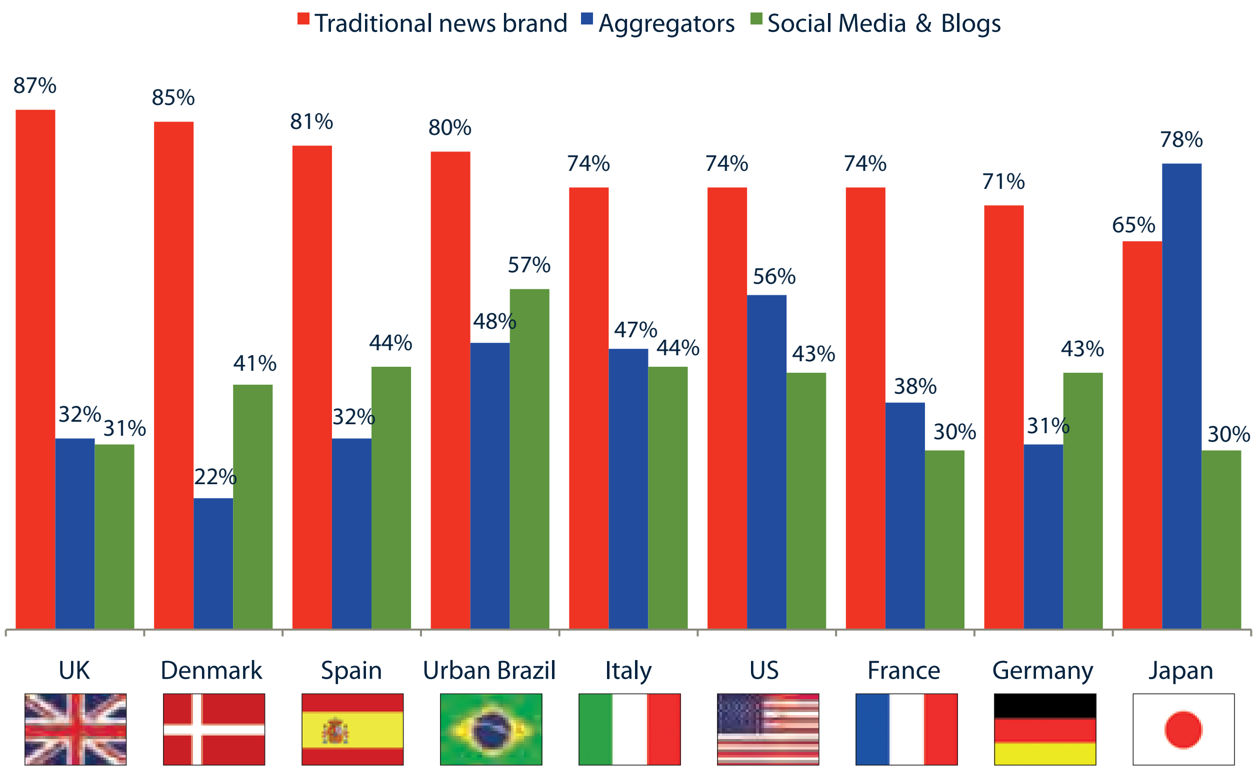
We've also seen the emergence of local pure players like Mediapart and Rue 89 in France and Politico and Buzzfeed in the United States. And blogs and social media are increasingly being seen as a regular source of news.

The extent to which these new players have taken market share and advertising revenue has depended on many factors, including the strength of existing media, their willingness to innovate, as well as the structure of the media market in general.

Either way the overall picture remains uneven, with traditional media most dominant in countries like the UK and Denmark.

Aggregators and new players have had the biggest impact in Japan and the United States, while social media have the strongest foothold in Brazil, Spain, and Italy.

Figure 3.3a: Strength of traditional news brands online compared by country



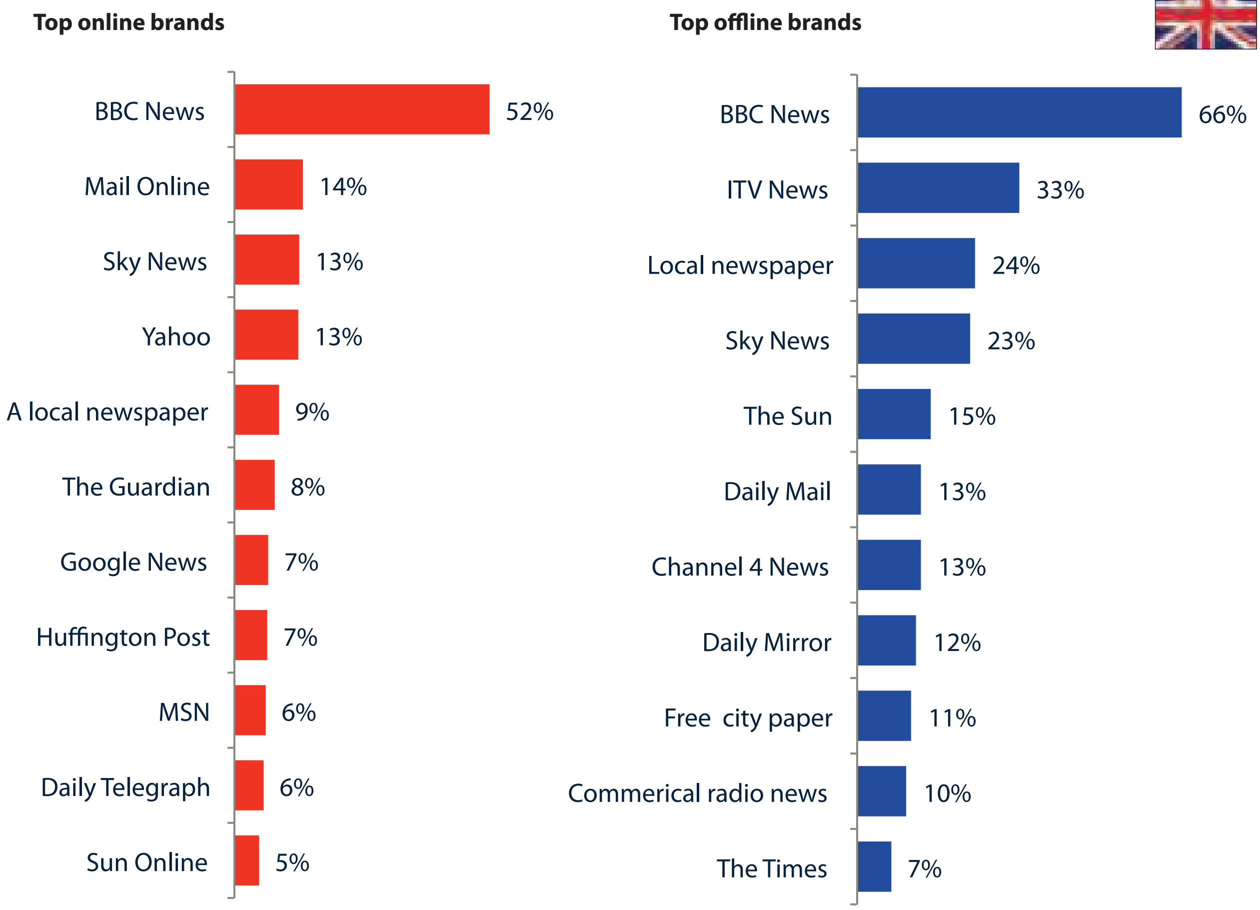
Q3: Which, if any, of the following have you used to access news in the last week?
Base: Online users in each market (UK=1534 ; US=1470; Germany=698 ; France=658 Denmark=816 ; Urban Brazil=892; Italy = 775; Spain=776; Japan = 831)

As we saw in the Executive Summary, in the UK and Japan broadcaster brands make up the majority of this traditional news brand usage. In Denmark and Spain and a number of other countries, it is former newspapers that have picked up majority market share. Driving further into the detail we can see very different media stories that lie behind this top-level view.

UK: Bastion of strong media brands

The BBC and a few other traditional brands dominate the UK online news market. More than half of our internet-based sample said they accessed BBC News via its website or mobile and tablet applications. BBC News has an even higher market share offline (66% of our sample). Even so it has successfully transitioned most of its natural audiences to the newer media, unlike long-term rival ITV News.

Figure 3.3b: Top UK online and offline brands compared

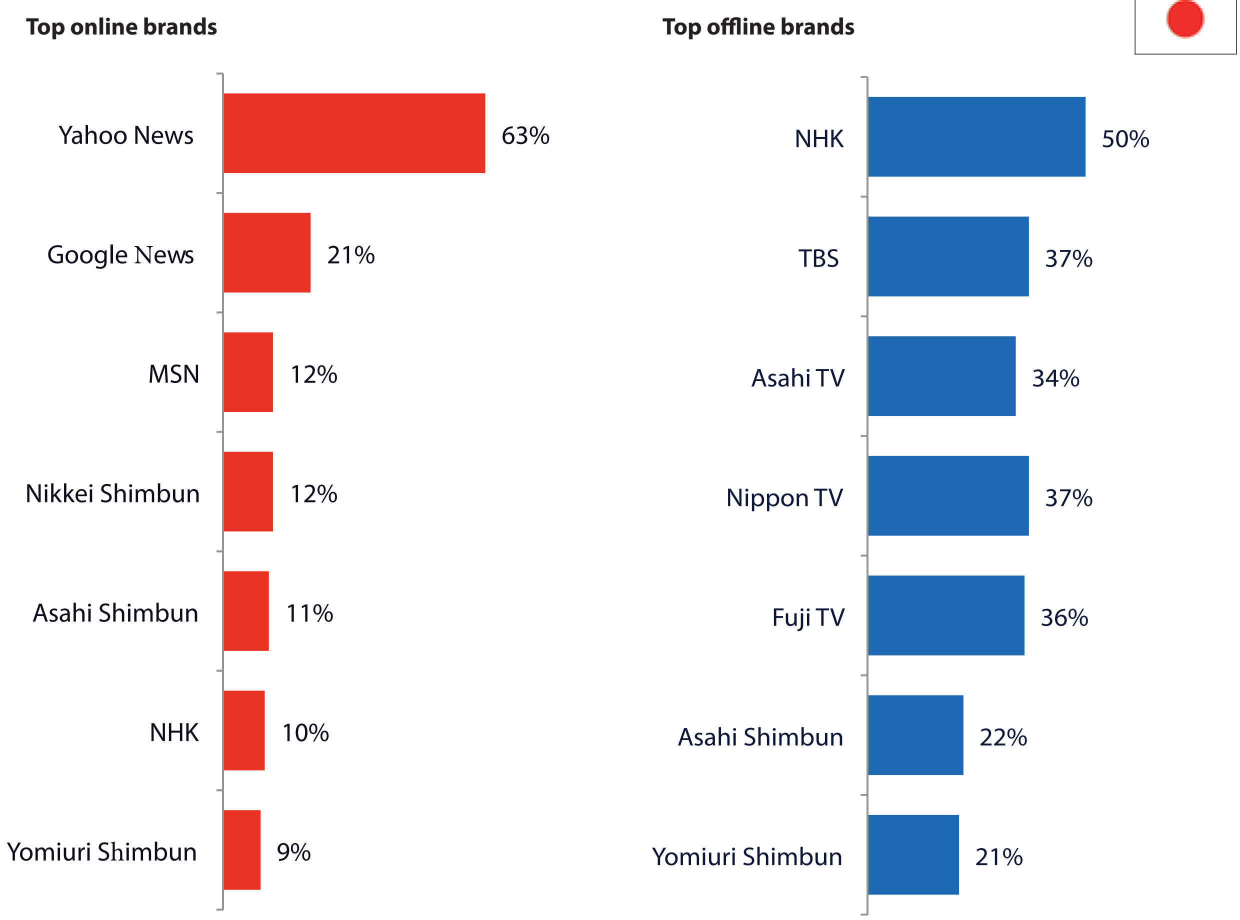


Q5: Which, if any, of the following have you used to access news in the last week?
Base: All who have used news sources in the last week UK (n= 2078)

Brand performance has remained largely stable since our survey 10 months ago. One new entrant is the Huffington Post which, with 7% of respondents citing it, has in less than two years built an online audience as large as the *Sun*, one of Britain's most successful newspaper brands.

Japan: The power of aggregation
In sharp contrast to the UK, the top Japanese online media sites are pure players and aggregators. Unlike the BBC, public broadcaster NHK has been unable to turn its TV and radio success into online audiences. Instead it was the US pioneer Yahoo – together with Japanese partner SoftBank – that invested early and hard and has reaped the rewards.

Figure 3.3c: Top Japanese online and offline brands compared



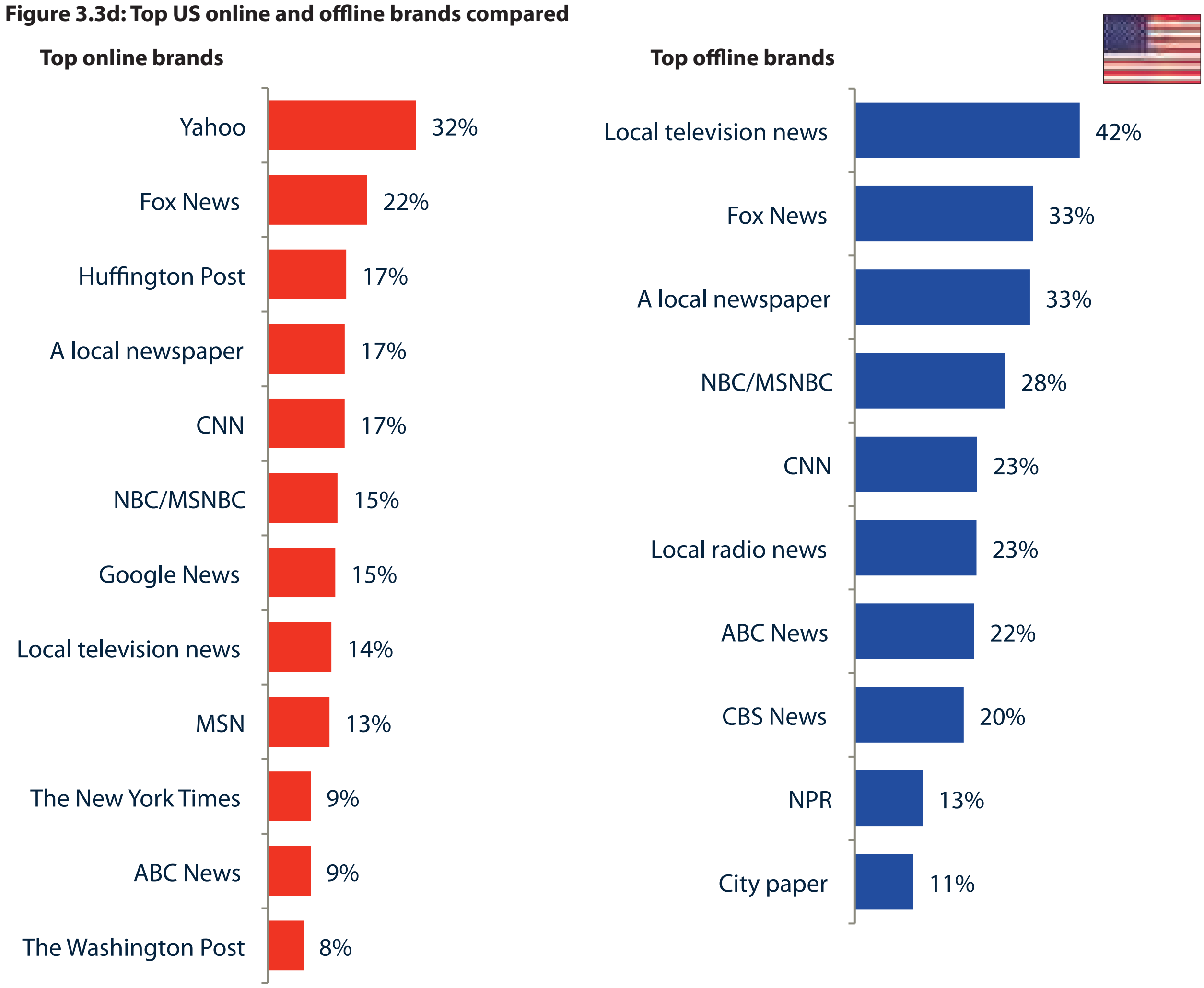
Q5. Which, if any, of the following have you used to access news in the last week?
Base: All who have used news sources in the last week Japan (n= 955)

United States: A mixed picture of pure players and traditional brands

Yahoo is also the most used online news brand in the United States (32%) but television news brands like Fox, CNN, and NBC also have a strong online presence.

We can also see how the internet has created a larger and more vibrant national media. The costs of offline distribution across vast distances had tended to create a more locally based media culture, particularly in print. Now any publisher can gain access to a vast market at marginal cost. One of the biggest beneficiaries has been the Huffington Post – now owned by AOL - which in just a few short years has gained a bigger national reach than the *New York Times* and the *Washington Post* and is now investing heavily in online video and television news output.[14]

Figure 3.3d: Top US online and offline brands compared



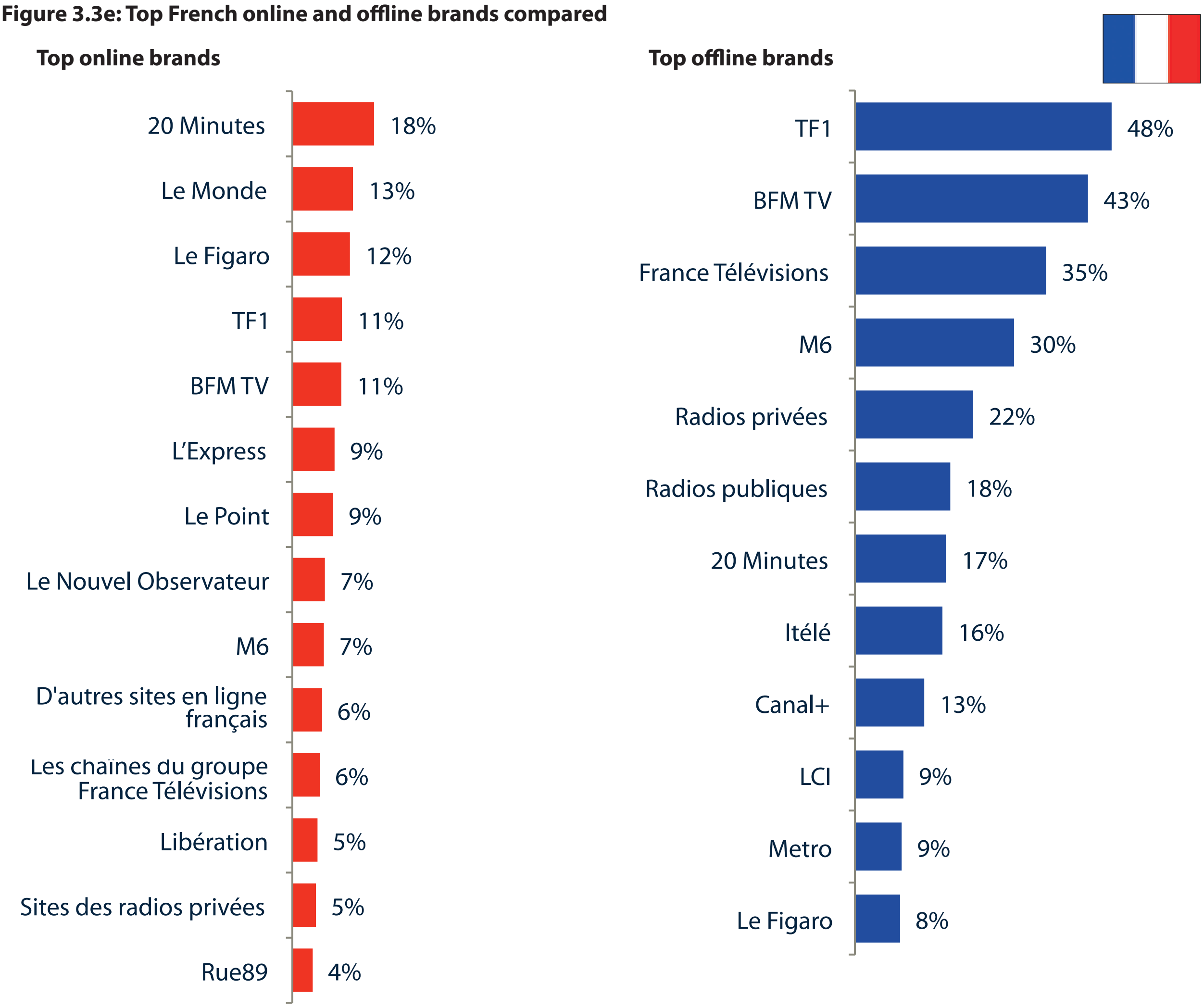
Q5.: Which, if any, of the following have you used to access news in the last week?
Base: All who have used news sources in the last week US (n=1973)

[14]www.themediabriefing.com/article/2013-03-18/Huffington-post-live-cable-tv-deal.

France: Fragmented online brands

As we've noted elsewhere in this report, France remains an unusual case in its reliance on traditional media and especially television news. Online news usage is lower than in other countries but is also highly fragmented. Newspapers lead the way but no single brand has been able to drive significant national audiences. At the same time there is very little interest in imported US brands like Yahoo or the French version of the Huffington Post. In sharp contrast to the US and UK, television brands have failed to make much of an impact online. The most successful online news site is a free newspaper (*20minutes*) but other innovators include online-only providers like Rue89 and investigative journal Mediapart.

Figure 3.3e: Top French online and offline brands compared

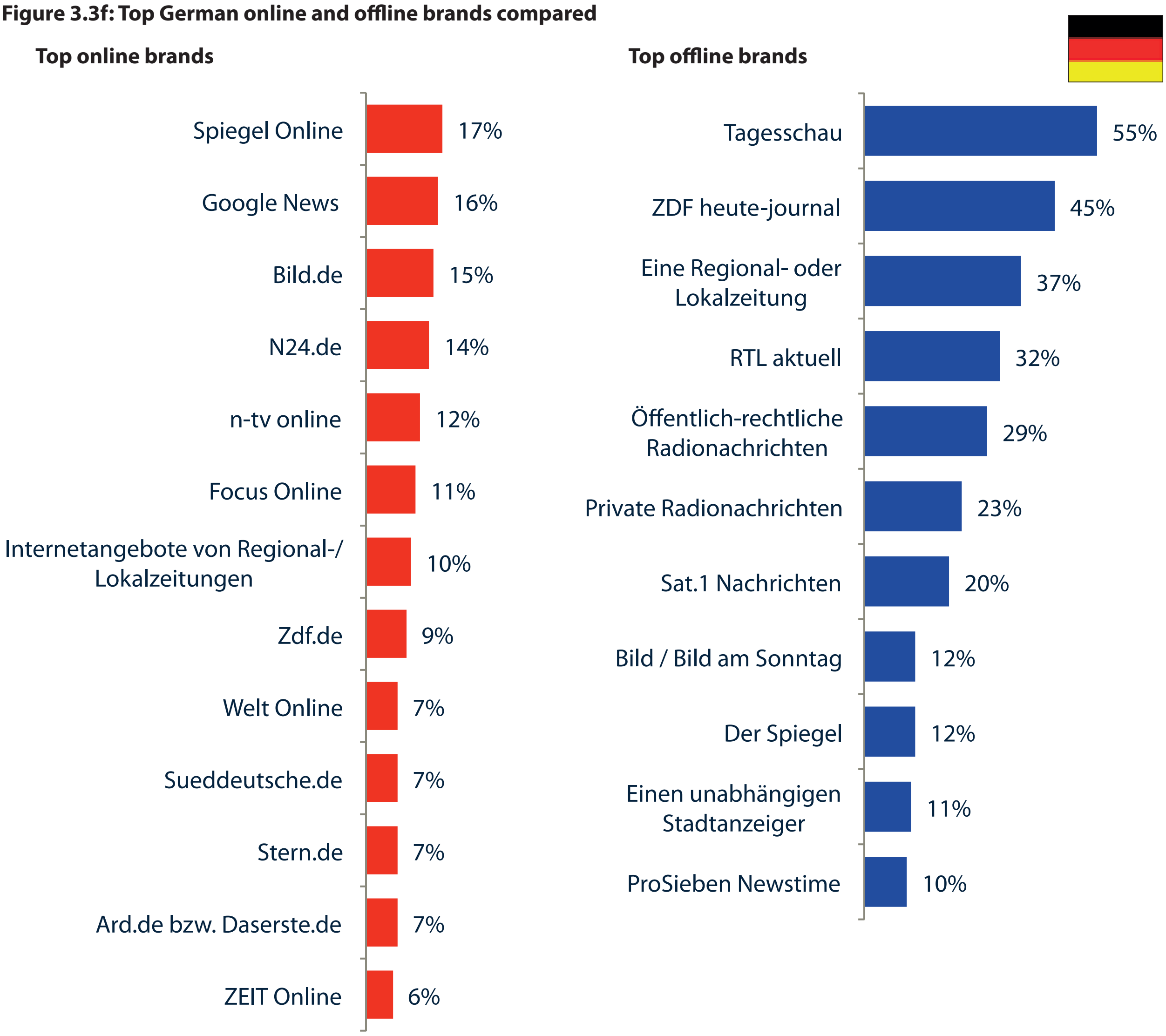


Q5: Which, if any, of the following have you used to access news in the last week?
Base: All who have used news sources in the last week France (n= 965)

Germany: Traditional media

In Germany, we see a similar picture with strong traditional brands achieving significant market share offline but a much more fragmented picture online. This is partly because public broadcasters have been restricted in the level of investment they have been able to make in online services; meanwhile print publications such as *Spiegel* and *Bild* are doing quite well online, alongside the new entrant Google News. In general, the strong regional structure of the German media may have contributed to the lack of national players of scale able to push online innovation and consumption.

Figure 3.3f: Top German online and offline brands compared



Q5: Which, if any, of the following have you used to access news in the last week?
Base: All who have used news sources in the last week Germany (n= 1048)

See Essay: Uwe Hasebrink And Sascha Hölig on the hold traditional television programmes such as Tagesshau and ZDF Heute-Journal still have in Germany, p. 81

It is possible to discern some overall patterns in these very different stories. In general, traditional brands cannot expect to achieve the same level of reach online as they deliver offline. They are no longer protected by high barriers to entry and face much wider competition. This has been especially true for broadcast brands as they move to the web (see Figure 3.3g).

On the other hand, a very few brands have been able to deliver very significant market share (the BBC in the UK and Yahoo in Japan and the US). Here, early mover advantage has set down patterns that may persist for years to come. And a small number of stronger newspaper brands has also gained market share by consistent investment in online news.

In general, broadcasters have tended to lose most market share especially those who had privileged access to limited spectrum. Whilst most newspapers have also lost market share, some with strong brands have been able to find new audiences at home and abroad.

Figure 3.3g: Brand winners and losers

Newspaper winners

Brand	Offline	Online	Gain
Guardian	4%	10%	**+6%**
Der Spiegel	12%	17%	**+5%**
NY Times	6%	9%	**+3%**
Le Monde	6%	13%	**+7%**

Broadcasting losers

Brand	Offline	Online	Gain
ZDF (Germany)	45%	9%	**-36%**
TF1 (France)	48%	11%	**-37%**
NHK (Japan)	50%	10%	**-40%**
ITV News (UK)	33%	3%	**-30%**

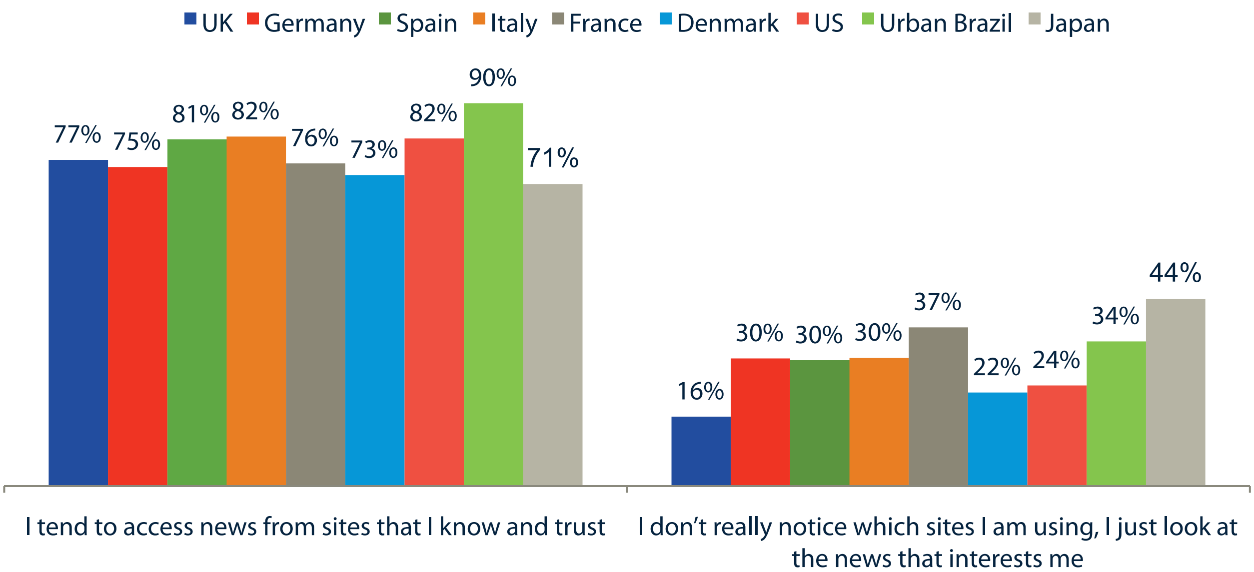
Q5: Which, if any, of the following have you used to access news in the last week?
Base: All who have used news sources in the last week (various)

3.4 The Importance of Brand and the Role of Trust

Despite almost unlimited news options online, most people still tend to use a small number of sources. Our findings suggest that news brands continue to play an important role in all our countries, particularly in Brazil, Spain, Italy, and the United States, where over 80% said they accessed news from sites they know and trust.

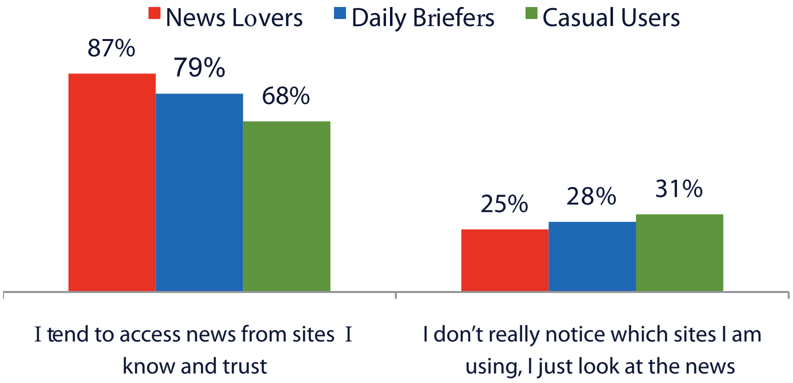
We also asked if online news users noticed which sites they were using when they clicked on news links. In some countries, significant numbers say they just look at the news that interests them, but brand matters more in some countries than others. In the UK only 16% said they didn't notice what sites they were using.

Figure 3.4a: Preference for accessing news via trusted sites (all countries)



Q9 : Thinking about the different kind of news available to you online, to what extent do you agree or disagree with the following statements:
Base: UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)
% agree

Figure 3.4b: Preference for accessing news via trusted sites by segment (all countries)



Q9 : Thinking about the different kind of news available to you online, to what extent do you agree or disagree with the following statements:
Base: All markets (n=11004)
% agree

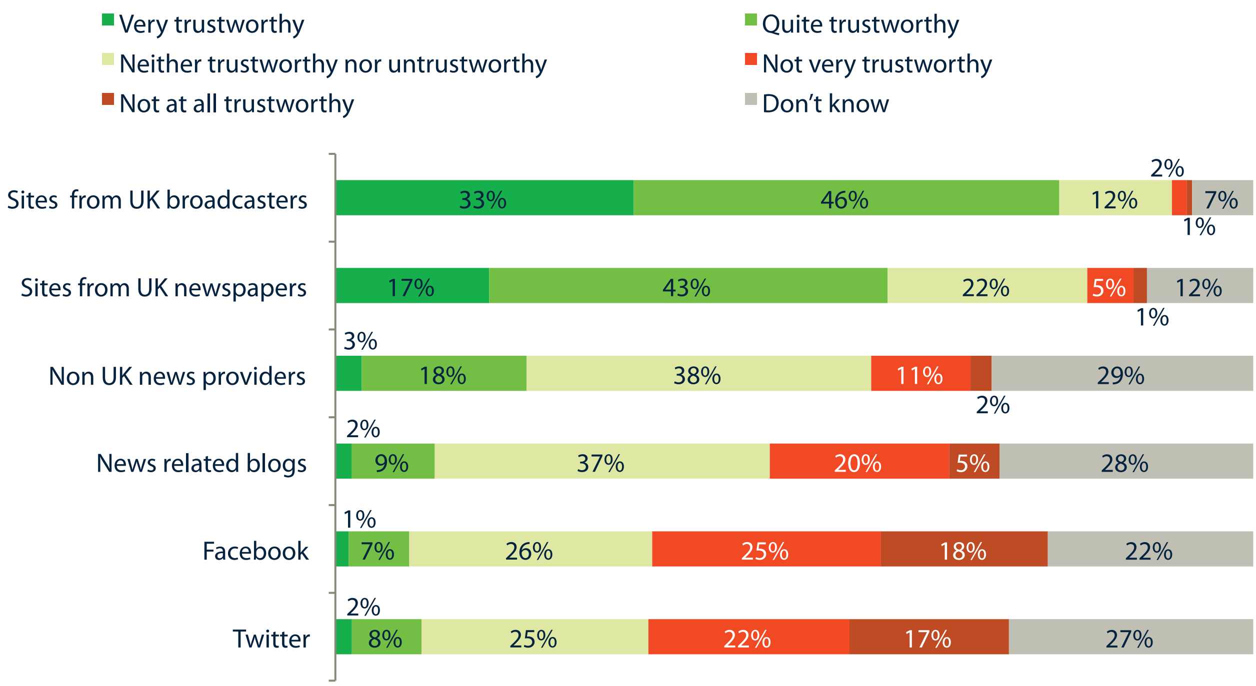
Looking at our segments across all countries, people who are most interested in news say that they value trusted brands most strongly. In contrast, casual users are less likely to notice which site they are viewing.

Trust in online news sources

In the UK – where there has been much discussion about the ethics of the press and broadcasting in recent years – we asked people to rate trust in different types of online news, including traditional media, foreign media, as well as social media and blogs.

Overall, online news from national broadcasters is most trusted (79% quite or very), followed by national newspapers (60%). In contrast, Facebook (8%) and Twitter (10%) are least trusted, with foreign broadcasters somewhere in the middle (21% trustworthy).

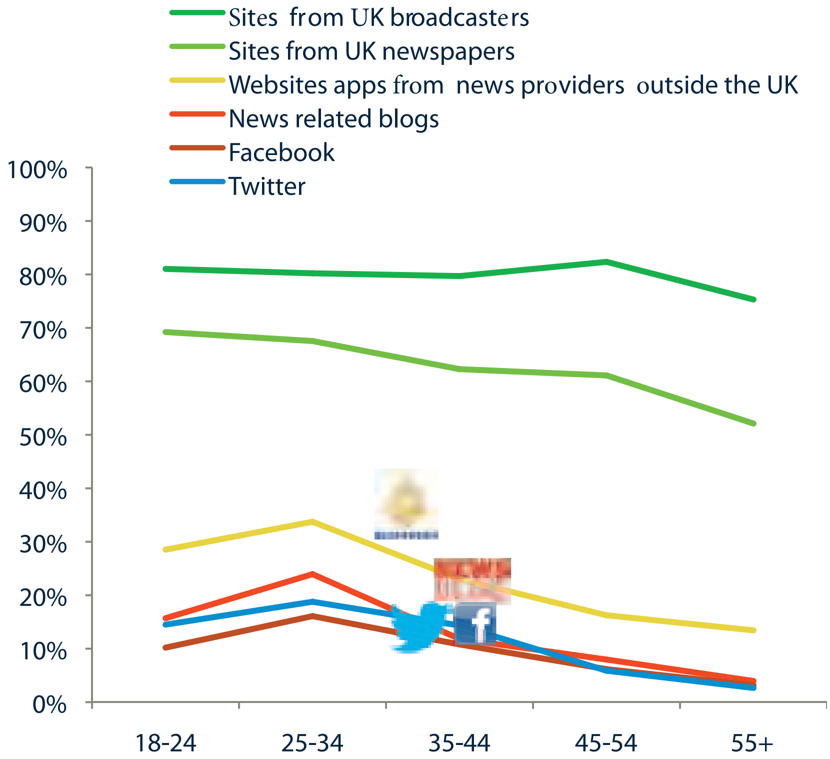
Figure 3.4c: Trust in different types of online news providers (UK)



Q9a: Thinking about the types of sites, mobile sites or apps where you get news online, in broad terms how trustworthy do you find the news content of the following?
Base: UK=2078

Levels of trust tend to decline amongst the oldest groups for all media types. The 25–34 year olds show greater trust than other groups in social media and foreign broadcasters. This suggests that this group of digital natives is more open-minded when it comes to trying alternative sources of online news.

Figure 3.4d: Trust in different types of online news providers by age (UK)



Q9a: Thinking about the types of sites, mobile sites or apps where you get news online, in broad terms how trustworthy do you find the news content of the following?
Base: UK=2078 18 to 24 (n=269) 25 to 34: (n=286) 35 to 44: (n=321) 45 to 54 (n=383) 55+ (n=819)
Chart shows net: very/quite trustworthy

3.5 Gateways: How Audiences Discover News Online

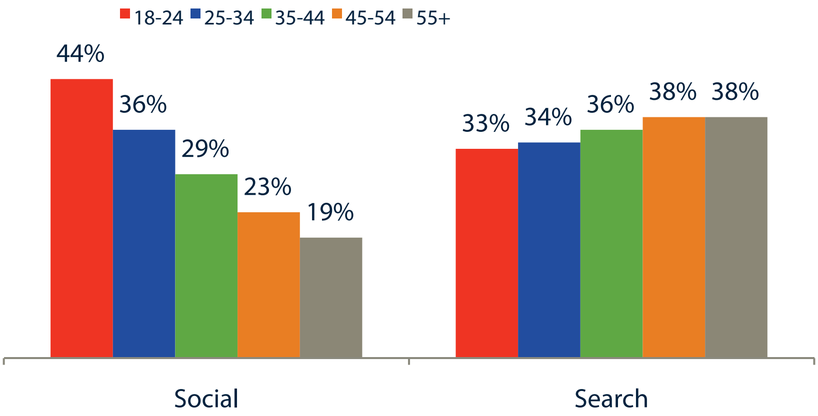
Although in many countries audiences place the highest trust on online news from familiar providers, they are using an increasingly varied set of ways to find that content. Google, Facebook, and Apple have become – to a greater or lesser extent – intermediaries for a large proportion of news journeys online. As a result, they have been able to take a significant share of the available advertising revenue around news, making the funding of trusted content arguably more uncertain. Our data show brand, search, and social media the most important discovery mechanisms, with search particularly important in European countries like France and Germany.

Figure 3.5a: Top ways of finding news

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Directly via a branded site	34%	32%	38%	35%	16%	55%	20%	47%	28%
General search engine like Google	24%	40%	40%	49%	45%	30%	33%	44%	39%
Specialist news search engine	10%	16%	23%	40%	22%	1%	14%	34%	29%
Sites that aggregate news links	17%	16%	17%	16%	12%	7%	26%	37%	43%
Newsreader 'app' e.g. Flipboard	3%	3%	11%	4%	3%	4%	6%	7%	3%
Social network - e.g. Facebook	17%	15%	45%	38%	14%	22%	30%	60%	12%
Blog or personal site	2%	3%	9%	8%	3%	2%	9%	13%	8%
Email newsletter	7%	22%	19%	20%	24%	22%	22%	25%	17%
News alert	8%	12%	11%	9%	19%	16%	18%	19%	8%
Alerted by friends, colleagues	18%	20%	23%	21%	12%	15%	26%	33%	13%

Q10 : Thinking about how you FIND news online, which are the main ways that you come across news stories?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

Figure 3.5b: Top gateways – social media vs search by age (all countries)

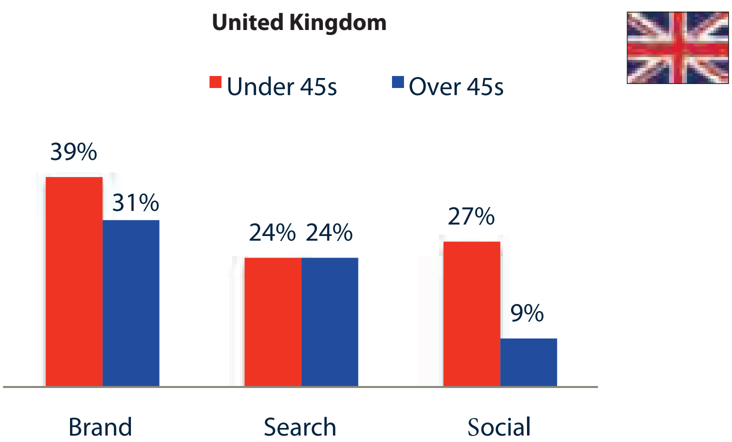


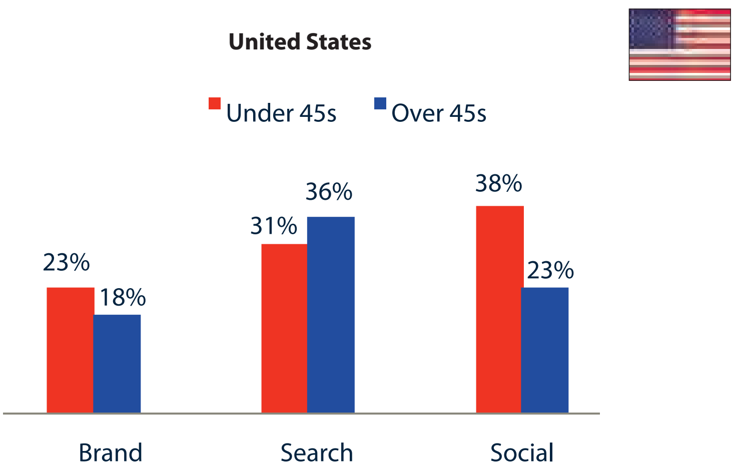
Q10 : Thinking about how you FIND news online, which are the main ways that you come across news stories?
Base: All markets (n=11004)

But perhaps the biggest trend in this data is the growing importance of social discovery. For the under 35s – looking at the aggregated data across all of our countries – this is now the most important way in which people find news stories.

For older groups, other ways of navigating to news, such as search, remain more important than social media.

Figure 3.5c: Top gateways to news (UK and US compared)

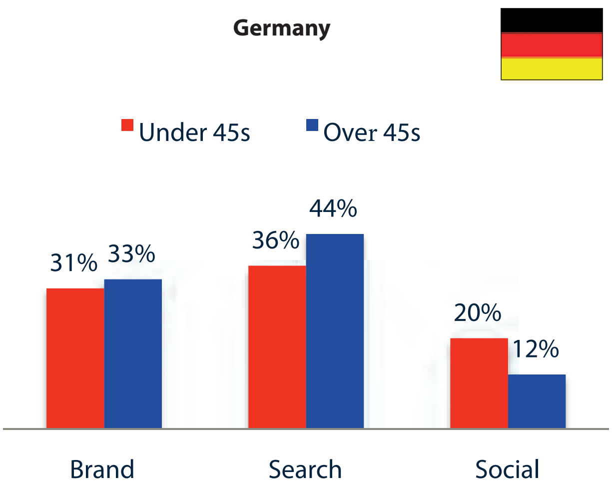




Q10 : Thinking about how you FIND news online, which are the main ways that you come across news stories?
Base: UK (n=2078) US (n=2028)

Within this average, though, we see significant differences in behaviour by country. In the UK strong brands remain the main way of finding news for all age groups, but in the United States search and social media are more important. In all countries, younger groups are far more likely to use social media for news discovery.

Figure 3.5d: Top gateways to news



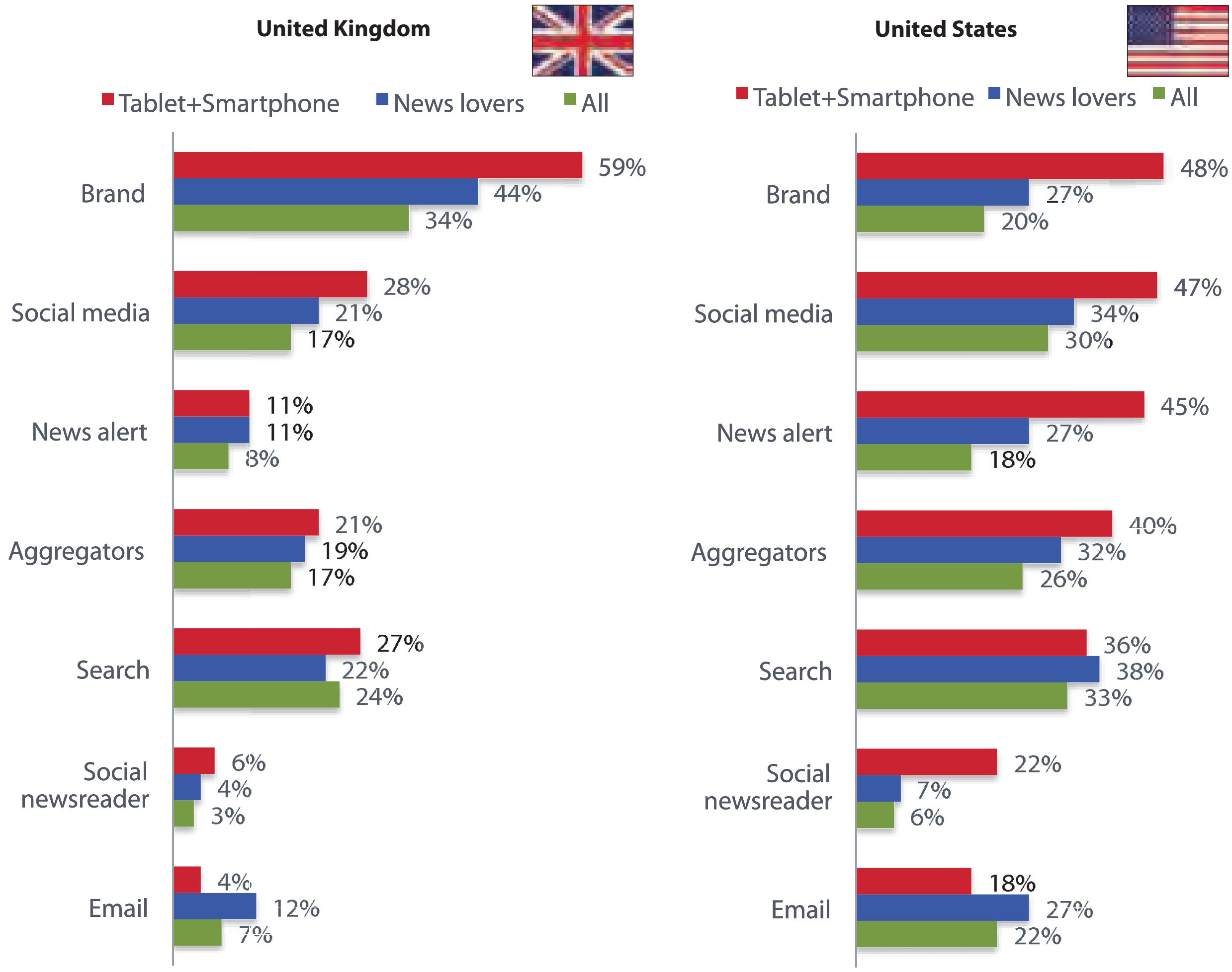
Q10 : Thinking about how you FIND news online, which are the main ways that you come across news stories?
Base: Brazil (n=986;) U45 (n=649), O45 (n=336) Germany (n=1064) U45 (n=445) O45 (n=619)

Germany relies on a mixture of search and brand, with 18–44s twice as likely to use social media as the over 55s (Figure 3.5d). The Brazilians use more gateways in total – reflecting their higher interest in news – but uniquely all age groups say social media is their most important way of finding news online.

Smartphones and tablets strengthen brands

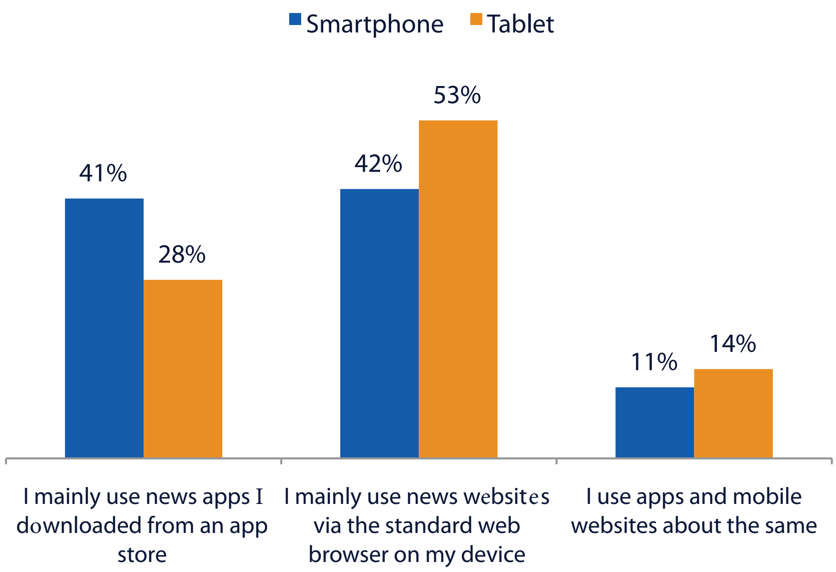
Our data also suggest that those who use smartphones and tablets are more likely to go straight to a news brand. To some extent this is a function of their greater interest in news. But the data also indicate that certain mechanisms – like social newsreading apps and 'push' news alerts – are disproportionately used on these devices to discover news content.

Figure 3.5e: Impact of device on the discovery of news (US and UK compared)



Q10 : Thinking about how you FIND news online, which are the main ways that you come across news stories?
Base: All UK=2078; US=2028 Tablet and Smartphone users UK (n=143) US (n=187) News Lovers UK (n=448) US (n=557)

Figure 3.5f: Percent using news apps and web browsers by device (UK)

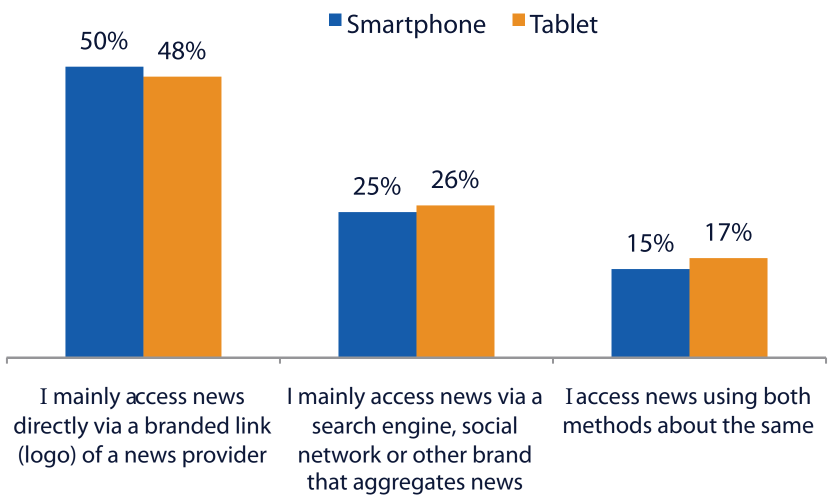


QS11a/b Thinking specifically about when you look for news on a MOBILE/TABLET, which of the following statements most applies to you?
Base UK : All who have accessed news via a smartphone in the last week (n=612) All who have accessed news via a tablet in the last week (n=340)

Apps or mobile websites

The growth of news apps on tablets and smartphones has raised questions about the new gatekeeping role of Apple and Google in particular. Our UK data suggest that news apps are more important for smartphones than for tablets. This may be because apps make better use of the smaller screen size available on a smartphone, although it will be interesting to see how this changes with the roll out of more 'web apps' and responsively designed websites.[15] Apple users in the UK are significantly more likely to download a news app from a store (52% vs 31% for non iPhone users).

Figure 3.5g: Accessing news via a branded link (UK)



QS12a/b Thinking specifically about when you look for news on a MOBILE/TABLET, which of the following statements most applies to you?
Base UK : All who have accessed news via a smartphone in the last week (n=612) All who have accessed news via a tablet in the last week (n=340)

We also asked our UK smartphone and tablet users whether they accessed news via branded link or an aggregator like a search engine or social network. On both devices, respondents said the desktop icon was the most important route to news, suggesting that strong news brands may be benefiting from the historic shift to mobile.

[15]Many news sites (e.g. *Guardian*, BBC, *Boston Globe*) have developed a single output that formats itself automatically to fit a range of mobile and tablet screen sizes. The *Financial Times* has developed an html5 web app that is not dependent on Apple and can store content on the go.

To explore this further, we asked people specifically which brands they used on which device across a range of countries. There are three broad conclusions:

- Brands that grew up with the web browser, helped in many cases by default browser settings – Yahoo and MSN – are losing out on tablet and smartphone in the UK and United States at least.
- Brands that have built a reputation for breaking news – Sky News, CNN, and *Der Spiegel* – have gained market share on mobile, but not necessarily on the tablet.
- Other strong brands – *New York Times*, Fox News, *Daily Mail*, the *Guardian* – tend to pick a similar market share across platforms. People tend to use the brands they are comfortable with elsewhere rather than change preference based on platform.

One other explanation for some of these differences is that the aggregator brands in the US and UK (Yahoo, MSN, etc.) appeal more to lower income households that have not acquired these new devices. It will be interesting to see if these differences in market share even out as tablet and smartphone use becomes more mainstream.

Figure 3.5h: Brand winners and losers: impact of device on market share

United Kingdom

Brand	Computer	Mobile	Tablet
BBC	68%	69%	63%
Sky	15%	25% (+10%)	21% (+7%)
Daily Mail	18%	14%	16%
Guardian	12%	11%	11%
Yahoo	20%	8% (-12%)	9% (-11%)
MSN	10%	4% (-6%)	4% (-6%)

United States

Brand	Computer	Mobile	Tablet
Yahoo	37%	25% (-12%)	27% (-10%)
Fox	22%	21%	23%
CNN	16%	19% (+3%)	16%
New York Times	11%	9%	12%
USA Today	5%	8%	13%
MSN	14%	10% (-4%)	10% (-4%)

Germany

Brand	Computer	Mobile	Tablet
Bild	21%	21%	16%
Spiegel	22%	27% (+5%)	22%
NTV	11%	15% (+4%)	15% (+4%)
Yahoo	7%	6%	5%
MSN	7%	4%	4%

Japan

Brand	Computer	Mobile	Tablet
Yahoo	74%	70%	N/A
Nikkei.com	15%	13%	N/A
NHK	9%	6%	N/A
Yomiuri.co.jp	9%	7%	N/A
MSN	13%	10%	N/A

Q8b :You say you access news via a computer, smartphone, tablet, when using that device which of the following news sources have you used in the last week?
Base: US Computer (n=1311), Smartphone (n=556), Tablet (n=312) UK Computer (n= 1394), Smartphone (n=612), Tablet (n=340) Japan Computer (n=605), Smartphone (n=170), Tablet (n=51), Germany; Computer (n=612), Smartphone (n=212), Tablet (n=105)

3.6 Participation and Engagement Online

There are significant differences in the level of participation in the news across countries. At a headline level, Brazil, the US, Spain, and Italy are most likely to post comments, share links, and talk about news. The Japanese and Germans are least likely to do so. Americans, for example, are twice as likely to comment on a news story online or 'like' a news story, compared with the Germans or the British.

Figure 3.6a: Types of online (and offline) participation around news

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Share a news story via social network	11%	8%	30%	33%	14%	13%	22%	44%	8%
Share a news story via email	10%	10%	24%	19%	18%	10%	23%	32%	4%
Rate (or Like) a news story	6%	9%	26%	29%	11%	12%	14%	41%	10%
Comment on a news story in a social network (like Facebook or Twitter)	10%	8%	27%	26%	10%	11%	21%	38%	7%
Comment on a news story on a news website	7%	8%	8%	16%	8%	5%	16%	22%	4%
Write a blog on a news or political issue	1%	2%	3%	5%	2%	2%	4%	5%	4%
Post or send a news-related picture or video to a social network site	4%	5%	10%	10%	6%	5%	12%	21%	3%
Post or send a picture or video to a news website/news organisation	2%	2%	5%	6%	4%	1%	3%	6%	3%
Vote in an online poll via a news site or social network	11%	16%	21%	24%	11%	14%	30%	31%	7%
Take part in a campaign or group based around a news subject	4%	4%	5%	7%	5%	3%	8%	7%	2%
Talk with friends and colleagues about a news story online	16%	11%	30%	30%	16%	10%	31%	39%	9%
Talk with friends and colleagues about a news story	44%	39%	55%	50%	34%	49%	51%	43%	17%
TOTAL*	**63%**	**60%**	**84%**	**85%**	**62%**	**66%**	**74%**	**93%**	**40%**

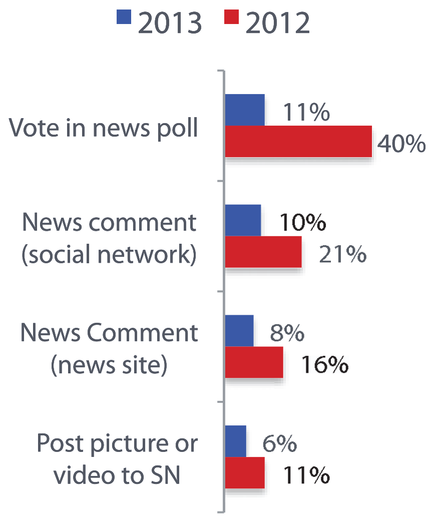
* Total of all those who participated with news (online or offline) using one of the 12 listed techniques

Q13: During an average week in which, if any, of the following ways do you share or participate in news coverage?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

At a fundamental level, we see very different 'participatory cultures' around news. 60% of our Japanese sample says they did not participate in any of the 12 ways suggested to them in our survey in the past week, compared with only 8% in Brazil and 15% in Italy.

One interesting change since last year is a decline in online participation in France. The number taking part in online polls about news for example has fallen from 40% to 11%. Last year's survey coincided with the run-up to the French presidential elections and these data suggest that a political campaign can significantly increase the amount of online participation. It should be noted that Italy was also in a pre-election period during our 2013 survey, which may explain the higher than average figures in a number of categories.

Figure 3.6b: The impact of elections on online participation (France 2012 v 2013)

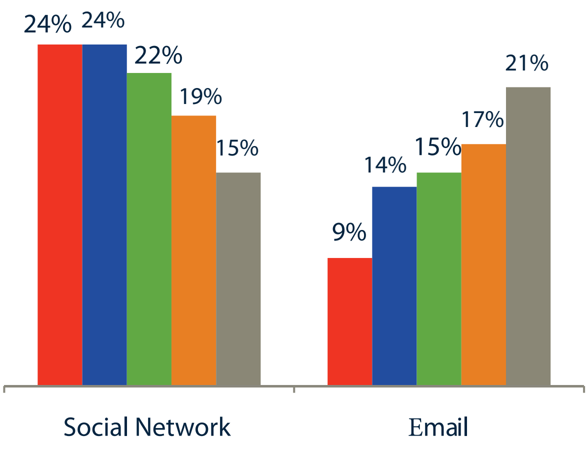


Q13: During an average week in which, if any, of the following ways do you share or participate in news coverage?
Base: France (n=972)

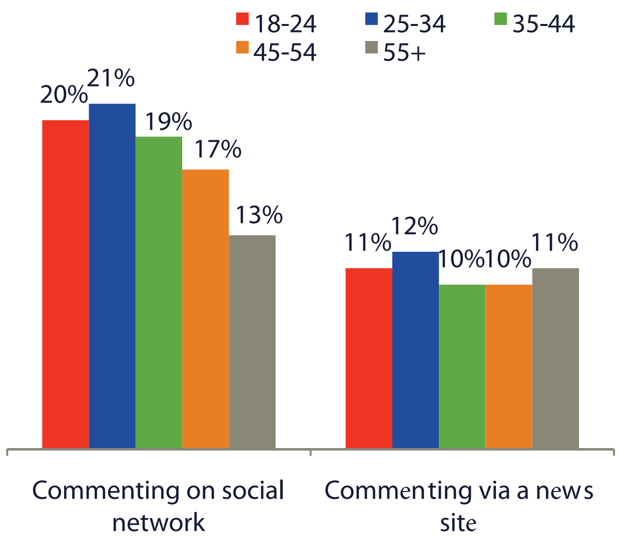
A number of types of online participation are strongly correlated with age. In general, we see higher online participation with younger age groups and amongst men. Specifically, young people are more likely to share a news link, comment on news, or post a picture in a social network, whereas older groups are more likely to use traditional methods like email or commenting via a trusted news site. In general, we see higher online participation with younger age groups and amongst men.

Figure 3.6c: Young prefer sharing and commenting via social networks

% sharing by social network vs email



% commenting via social network vs news site

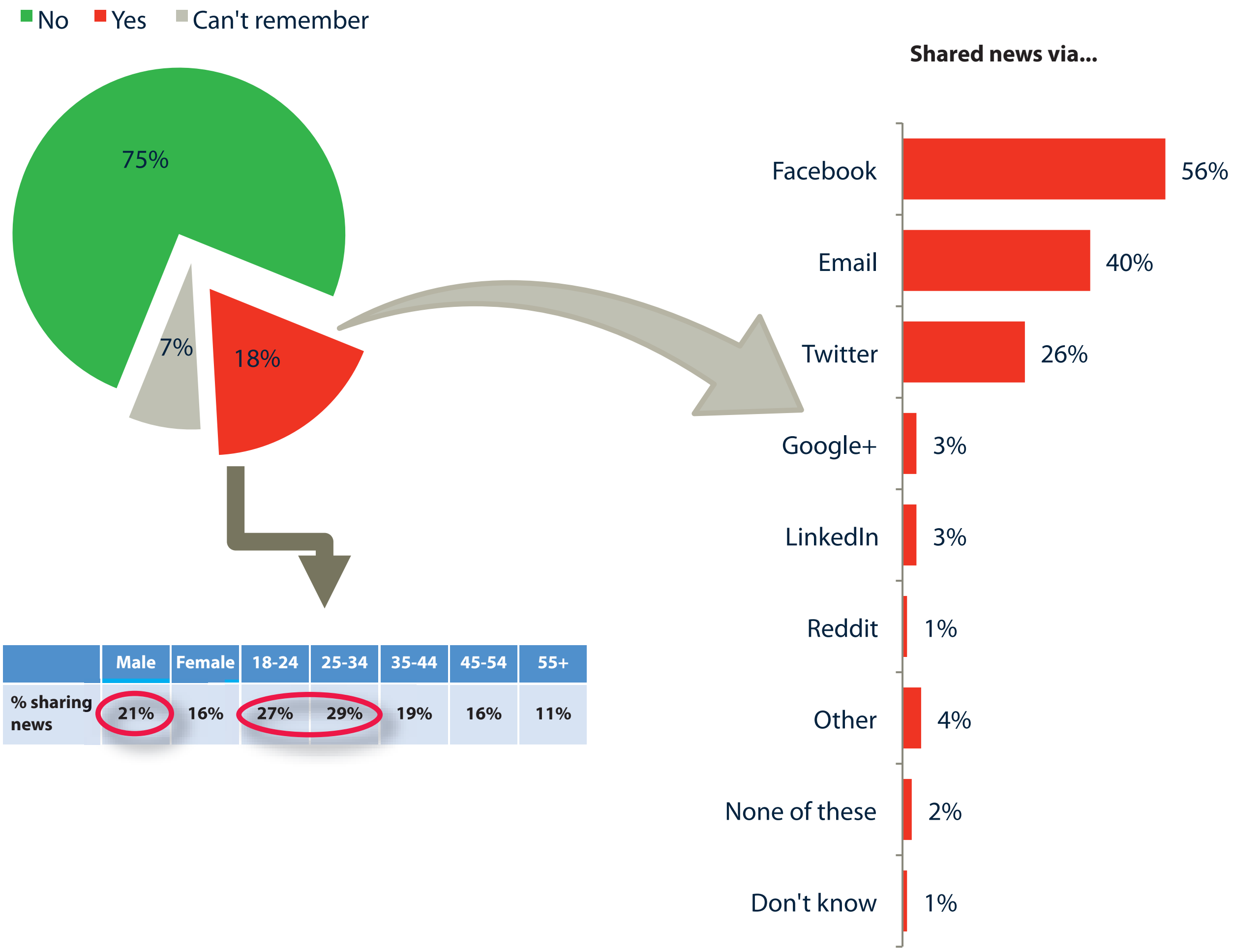


Q13: During an average week in which, if any, of the following ways do you share or participate in news coverage?
Base:: All markets (n=11004)

Across our countries, around one in five share a news story via email (17%) or a social network (20%) each week. Amongst those who share news, our UK data allow us to drill down into which networks are most important. Facebook, email, and Twitter account for the vast majority of activity, though other networks are popular elsewhere, e.g. Reddit in the US, Orkut in Brazil, and a range of other networks in Japan.

Figure 3.6d: Most important social networks for sharing news (UK)

Percent sharing news

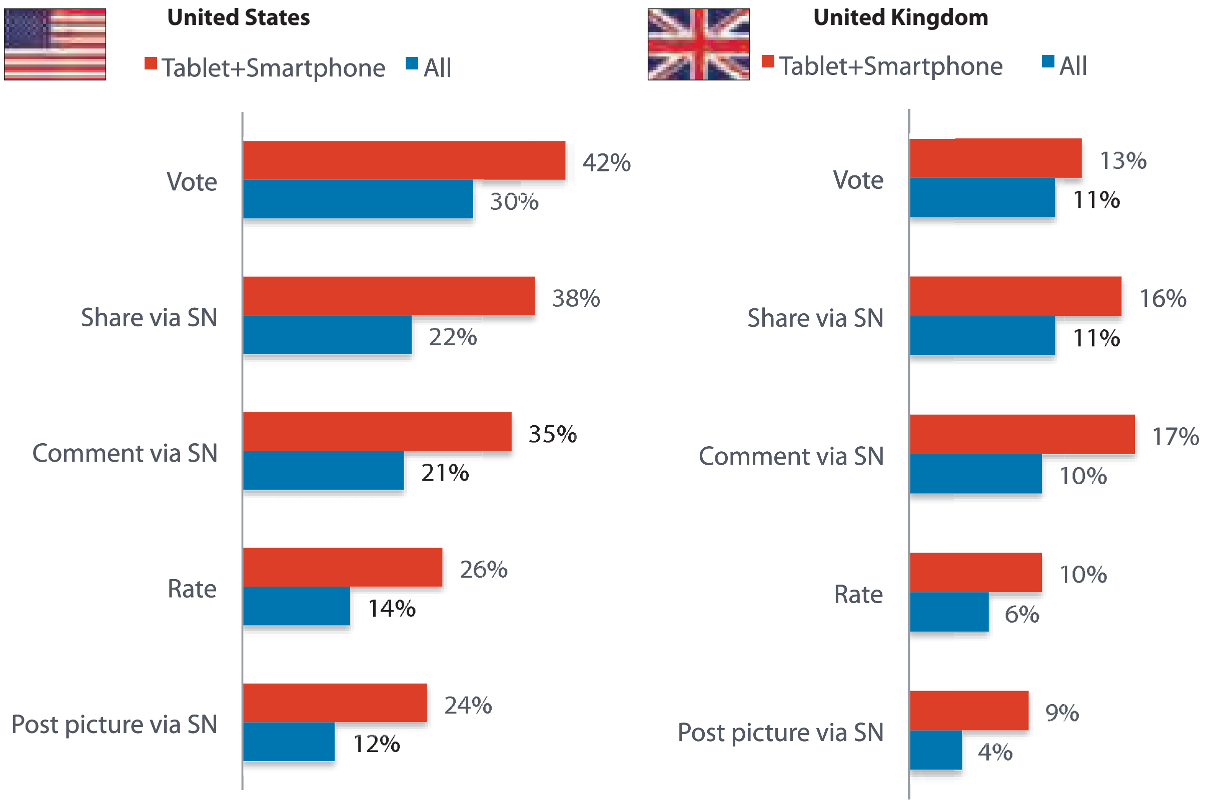


	Male	Female	18-24	25-34	35-44	45-54	55+
% sharing news	21%	16%	27%	29%	19%	16%	11%

QS8b/8c Thinking about how you share news, in the last week have you passed on a link to an online news story, video etc. via email, social networking or other means?/Through which of the following means?
Base: UK=2078; Share news (n=377)

Looking again at devices, those using smartphones and tablets are participating more heavily in news than the general sample. They do more of everything.

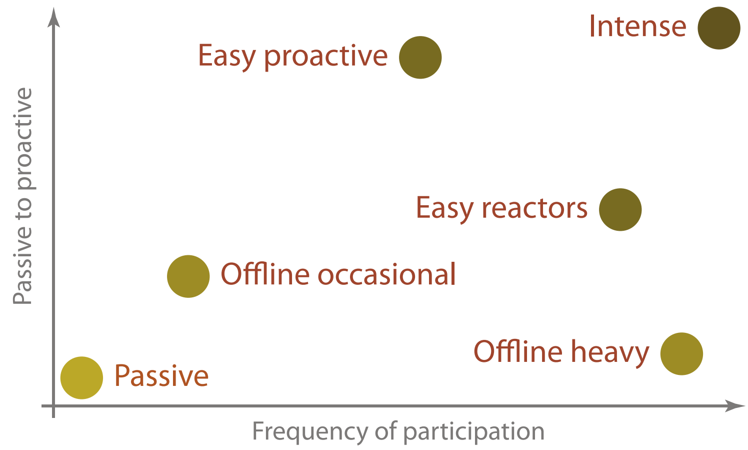
Figure 3.6e: Participating in news (tablet and smartphone users)



Q13: During an average week in which, if any, of the following ways do you share or participate in news coverage?
Base: (UK=2078; US=2028) Tablet and Smartphone users UK (n=143) US (n=187)

In explaining these differences, we again ran our regression model to see if we could separate the impact of device from other factors like age, gender, education, income and interest in news. In the United States we found a significant relationship with Apple smartphones, where users were 41% more likely to share news than other digital news users. Tablet usage does not seem to have an impact on sharing news when controlling for these other variables and in the UK neither tablets nor smartphones showed a significant relationship.

Figure 3.6f: Model of participation – Segmented by ways participated in news and frequency of participation



UK participation model – Indicative only

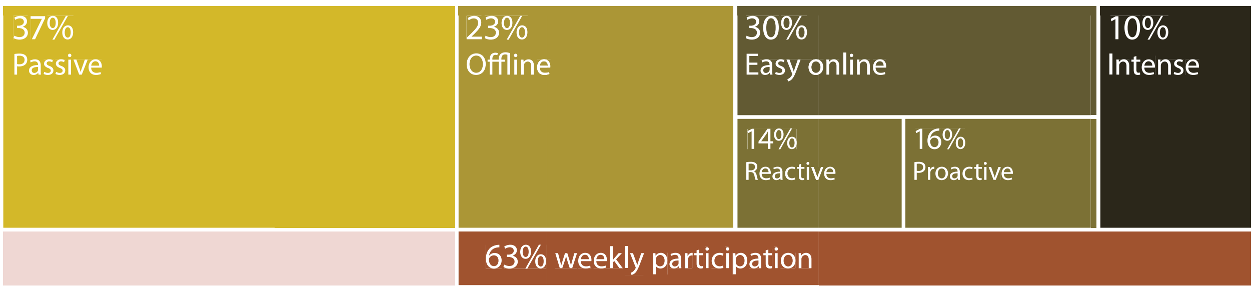
New model of participation

In the UK we have attempted this year a new classification of how people participate with online news. This was created by coding responses to questions about contributing to the news according to levels of *proactivity* (e.g. posting a comment, writing a blog) and *reactivity* (liking a news story, voting, etc.). We then combined this with the *frequency* with which each activity takes place. Offline activities relate to the question we asked about discussing news with friends or colleagues.

This model draws on research published by the BBC in 2012, which demonstrated that a significant majority of the population is now actively participating online[16] – even if most of the proactive discussion is still confined to a minority. When we applied these techniques to our online news sample, we also found that the majority (63%) is participating in some way each week, with 40% doing so online.

Easy participation – such as liking, sharing and voting – turns out to be the most popular set of activities driven by the increasing availability of these tools on websites and social networks. But we have also identified a group of 'intense participators' who drive much of the *proactive* online engagement, especially around politics and entertainment/celebrity news.

Figure 3.6g: New model of online participation – UK



[16] Holly Goodier, 'The Participation Choice', BBC Online, http://www.bbc.co.uk/blogs/bbcinternet/2012/05/bbc_online_briefing_spring2012_participation.pdf.

If we drill further into the data, we can see that the 25–34 group is particularly proactive (35% of all intense participators). The intense group is also heavily male.

In contrast, the majority of those who are passive or contribute occasionally offline come from older groups, particularly the over 55s. People who like to talk about news offline tend to be female.

Figure 3.6h: Types of user segmented by age (UK)

	Intense	Easy Proactive	Easy Reactors	Offline Heavy	Offline Occasional	Passive
18 to 24	17%	17%	13%	10%	9%	9%
25 to 34	35%	20%	19%	20%	11%	13%
35 to 44	18%	18%	15%	20%	15%	17%
45 to 54	17%	19%	18%	26%	20%	17%
55+	13%	26%	35%	25%	45%	42%
Male	61%	53%	48%	41%	37%	49%
Female	39%	47%	52%	59%	63%	51%

Q13: During an average week in which, if any, of the following ways do you share or participate in news coverage?
Base: UK (n=2078) Intense (n=182) Easy Proactive (n=284) Easy Reactors (n=327) Offline(n=494) Passive (n=791) Offline Heavy (n=125) Offline Occasional (n=369)

In years to come, we can expect more of the offline participators to come online. It will also be interesting to see if the wide differences between countries persist in terms of adoption of new social and participatory techniques.

Essays

The Uneven Digital Revolution

By Rasmus Kleis Nielsen, Roskilde University and the Reuters Institute for the Study of Journalism, University of Oxford

This year's *Digital News Report* documents that the digital revolution continues to make uneven progress. First, progress continues to be uneven *between* countries. Most obvious in our nine-country survey are the digital divides between on the one hand middle-income Brazil with less than 50% of the population online and on the other hand the eight high-income countries, all of which have more than half the population actively using the internet (and many of whom have 80% or more online).

Second, progress remains uneven *within* countries. Even in affluent, developed democracies like France, Germany, and the United States, about a fifth of the population are not regular internet users, let alone smartphone or tablet owners.

Third, progress takes *different forms* from country to country, and the 2013 Digital News survey gives us detailed, comparative data to start mapping the different ways in which people in different countries use digital technologies to access, share, and interact with news. The results reported here make immediately clear that even countries with similarly high levels of internet use and mobile web access in some cases have developed quite different patterns of use, perhaps reflecting different 'participatory cultures' – at least when it comes to news.

In this essay, I will highlight some of the most important and interesting similarities and differences in terms of the different forms the digital revolution has taken, focusing in particular on three aspects. First, the global rise of a small number of US-based digital intermediaries in the form of Google, Facebook, and – to a lesser extent – Apple. Second, differences in terms of the importance of brand names, search engines, and social networking sites as gateways to news in different countries. Third, the more pronounced differences in terms of how actively people in different countries – even different countries with similarly high levels of internet use and the like – share news, comment on news, or otherwise engage online with current affairs.

The rise of global digital intermediaries

Google and Facebook, a fifteen-year-old search engine company and a social networking service that has only just turned nine, have become key parts of the news media ecology in every country covered in this report. In the growing markets for smartphones and tablets and accompanying application distribution platforms (like the App Store and Google Play), Apple plays a dominant role in several countries, though competing device manufacturers like Samsung and competing operating systems like Google's Android means that the mobile market is significantly less concentrated than search or social networking services.

Given the central importance of search and social networking services as gateways to news, and the growing importance of mobile platforms, these dominant digital intermediaries occupy increasingly important positions as new gatekeepers online.[17] (Much talk of disintermediation aside, much of the success of these companies is based precisely on their role as some of the most significant intermediaries between media users and the content and services they access.)

Reliable data on the market share of Google, Facebook, and Apple in various countries is not easily available, but estimates produced by market intelligence companies tracking the search, social networking, and mobile markets gives an indication of their position, and our survey adds new details. The search engine optimisation company webcertain, for example, estimates that Google's search engine market share is between 87% (Italy) and 97% (Denmark) in the six Western European countries covered here.[18] In Brazil, the company is equally dominant. On its home turf in the United States, Google accounts for about two-thirds of

[17]Robin Foster, News Plurality in a Digital World (RISJ, 2012).
[18]http://globalcentral.net/assets/cb757434/Search-Social-2012-Done.pdf.

search and faces competition from both Microsoft's Bing (16%) and Yahoo (13%). Only Japan is an outlier in this respect, as Yahoo Japan continues to be the largest search engine there with a market share of approximately 50% – well ahead of Google's 40% share. (Since 2010, however, Yahoo Japan has actually used Google's search engine to power its search results.) Google has thus come to dominate market for search across the world, and as a consequence attracts a very large share of global online advertising – more than 40% according to a recent estimate.[19]

Though overall growth in the number of active users seems to have tapered off in many developed democracies, Facebook seems to be approaching a similarly dominant position in the market for social networking services. With the exception of Germany, where Facebook penetration is only about 36% of the online population, the social media monitoring and marketing company Socialbakers estimates that the California-based social networking site in early 2013 served between 49% (France) and 66% (Italy) of the online population of the six Western European countries covered here.[20] Reach is similarly high in Brazil, where an estimated 72% of the online population are active Facebook users and in the US, where about 62% of the online population are active users. Again, Japan is an outlier, with the local network Mixi as the market leader with about 25% of the online population as active users and Facebook number two with about 15%. With this one exception, Facebook is by far the most important social networking site in the countries we cover.

The markets for smartphones and tablets are so far less concentrated than the markets for search and for social networking services. Figure 4.1 provides data on the percentage of the population in each of the nine countries covered here who are internet users, who are smartphone users, and who are tablet users. In italics, the table includes the share of smartphone and tablet users who report they use Apple devices.

(Interestingly, the smartphone + tablet market is the only sector mapped here where one of the globally dominant US-based companies has as strong a position in Japan as elsewhere.) Apple continues to be a hugely important player in mobile markets and its tight control over its App Store and iTunes platforms continues to represent content providers, including news organisations, with a range of strategic challenges. But the company's early near-total dominance of both the smartphone and the tablet markets has been broken by competition in terms of hardware from companies like Samsung and in terms of operating systems and application distribution platforms by Google's aggressive move into mobile.

Figure 4.1: Internet, smartphone, and tablet use (with Apple market shares)

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Internet users	*84%*	*83%*	*67%*	*58%*	*80%*	*90%*	*78%*	*46%*	*80%*
Smartphone users	*42%*	*36%*	*37%*	*24%*	*33%*	*55%*	*36%*	*20%*	*21%*
Tablet users	*24%*	*15%*	*15%*	*13%*	*16%*	*32%*	*22%*	*14%*	*10%*
Apple s/phone market share	40%	26%	25%	33%	34%	48%	43%	29%	58%
Apple tablet market share	64%	50%	41%	43%	53%	81%	57%	40%	69%

Data on internet use from YouGov. Percentages of smartphone use and tablet use are calculated as parts of the total population. Data on percentage of smartphone users, tablet users, and Apple's market share from the 2013 Digital News Survey (Q8a) 'Which, if any, of the following devices do you ever use for any purpose?' (Multiple answers allowed).

[19]http://zenithoptimedia.blogspot.dk/2011/12/quadrennial-events-to-help-ad-market.html.
[20]http://www.socialbakers.com/facebook-statistics.

How many people are on the internet, how many people have mobile web access, and what people do online varies in important and sometimes pronounced ways from country to country. But a limited number of US-based digital intermediaries have, through a combination of powerful algorithms, shrewd harnessing of economies of scale and network effects, and good design, come to occupy key positions online across the globe.

Varying gateways to news

The rise of new global digital intermediaries like Google, Facebook, and Apple influence the flow of traffic online and increase the competition for digital advertising, often putting pressure on industry incumbents like newspapers and broadcasters historically accustomed to exercising considerable market power as key intermediaries between advertisers and audiences. In particular in the European Union, where these US-based companies are frequently more dominant than they are at home, their rise has worried publishers' associations, advocacy groups, and various regulators concerned primarily with competition, data protection, and privacy issues.

But how important are these new digital intermediaries actually, compared to established players, when it comes to how people find news online? This year's *Digital News Report* provides useful comparative data on this question, summarised in Figure 4.2 below.

Figure 4.2: Brands, search, and social as gateways to news online

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Branded sites	34%	32%	38%	35%	16%	55%	20%	47%	28%
Search engines	24%	40%	40%	49%	45%	30%	33%	44%	39%
Social networks	17%	15%	45%	38%	14%	22%	30%	60%	12%

Q10: Thinking about how you find news online, which are the main ways that you come across news stories? (multiple answers allowed, only some responses included here)
Base: Various

The survey results reveal a number of similarities but also interesting and important differences in terms of how people find news online. In general, there is no question that search and social media are becoming increasingly important gateways to news, supplementing users going directly to branded sites – but they are not equally important in all countries.

First of all, *branded websites* (of news organisations like broadcasters, newspapers, or online-only providers) remain an important gateway to news. In most of Western Europe, about a third of the respondents report that going directly to sites like the BBC or the Daily Mail Online in the UK or *El Mundo* or *El Pais* in Spain is amongst the main ways they come across news online. In France, branded sites are particularly weak, whereas in Denmark branded sites, most notably those of the public service broadcaster DR and the country's leading tabloid *Ekstrabladet*, draw large numbers of online news users. In Brazil, our urban survey respondents rate branded sites one of their main gateways to news, whereas branded sites appear weaker in both the US and Japan.

Second, there are some clear differences in terms of how many online news users name *search engines* as amongst their main gateway to news, and these differences do not correlate in any simple way with either the market share of a given search engine (like Google) or the overall ICT development index of the country in question. Search engines (by virtue of its market share almost invariably Google) represent the most widely named gateway to news online across much of Central and Southern Europe, with between 40% (Germany) and 49% (Italy) of online news users naming search as the main way in which they come across news stories. (It is noteworthy that publishers from these countries are also amongst those who have been most vocally concerned about Google's dominant position.) Amongst urban online Brazilians and Japanese internet users, search engines are equally important, whereas they are slightly less so in Denmark, the UK, and the US.

Third, the differences between the nine countries are even more pronounced when it comes to *social networking sites* as gateways to news. Social networks (predominantly Facebook) represent the most widely used way of finding news online for urban Brazilian internet users, and a widely used gateway in the US

(30%), Italy (38%), and Spain (45%). In all these countries, social networking sites, a signature 'web 2.0'-phenomenon, are by now significantly more important than more 'web 1.0'-like phenomena like aggregators and portals such as Yahoo and MSN as ways of accessing news.

In contrast, only between 14% (France) and 22% (Denmark) of respondents across the rest of Western Europe name social networking sites as one of the main ways of accessing news online. (Comparison across age groups suggests, however, that different generations have partially different approaches to finding news online – branded sites and search seem about equally important for all but younger demographics use social networking sites more, also for news.)

See Alison Preston essay for more on the impact of demographics, p. 97

Different participatory cultures

One question is how people access news online, another is what they do with it. The digital revolution has been accompanied by much speculation about the interactive and participatory potentials of new technologies that allow people to share, comment, and create their own content. So far, it has been less clear who – and how many – actually embrace and realise these possibilities, and whether they do it when it comes to news specifically.

Here, the findings from this year's *Digital News Report* are particularly interesting as they document a much lower level of overall engagement than some might have expected, as well as significant differences from country to country, suggesting the existence of different 'participatory cultures'.[21] Figure 4.3 collects the main findings regarding how people share, comment on, and create news online.

Figure 4.3: Sharing, commenting, and creating news

	UK	Germany	Spain	Italy	France	Denmark	US	Urban Brazil	Japan
Share a news story via email	10%	10%	24%	19%	18%	10%	23%	32%	4%
Share a news story via a social network	11%	8%	30%	33%	14%	13%	22%	44%	8%
Comment on news via social network	10%	8%	27%	26%	10%	11%	21%	38%	7%
Write a blog on a news issue	1%	2%	3%	5%	2%	2%	4%	5%	4%
Talk with friends and colleagues	44%	39%	55%	50%	34%	49%	51%	43%	17%

(Q13) 'During an average week in which, if any, of the following ways do you share or participate in news coverage?' (Multiple answers allowed, only some responses included here.)

First of all, it is striking that, even amongst our survey respondents (online news users) and in countries like the UK or the US, where about two-thirds of all internet users are also Facebook users, talking with friends and colleagues about news in offline social settings is far and away the most widespread form of 'participatory news use'. (Going beyond our sample of online adults, this is arguably even more so.)

Second, it is clear the online forms of sharing, commenting on, and writing about news remain minority pursuits in every single one of the nine countries covered here – even amongst our sample of online news users, and even in countries like Denmark, Germany, Japan, the UK, and the US, where internet use has been a majority phenomenon for a decade or more.

Most of our respondents presumably use email routinely, yet only between 4% (Japan) and 32% (amongst urban Brazilians online) use email during an average week to share news stories with others. In a few countries (Brazil, Italy) sharing and commenting on news via social networking sites is more widespread, but generally, this is not the case, though between half and two-thirds of the online population are Facebook users in many of these countries. Moving up the ladder of

[21]Henry Jenkins, amongst others, has offered the notion of 'participatory culture' as a complement to existing notions of 'consumer cultures' to capture cultural practices that combine low barriers to expression and engagement, high levels of sharing and user-creation, and a shared feeling that participation makes sense. Needless to say, such cultures can be rooted in many types of social communities and need not follow national boundaries, even though our data show that national differences exist in participatory practices concerning news use online. See e.g. Henry Jenkins *et al.*, *Confronting the Challenges of Participatory Culture* (NML, 2006), http://www.newmedialiteracies.org/wp-content/uploads/pdfs/NMLWhitePaper.pdf.

participation to more individual and typically more time-consuming forms of content production like writing a personal blog, only a small minority engages in such activities on a regular basis.

Looking at these numbers in light of standard indicators of ICT development like the International Telecommunications Union's IDI, it is clear that online participation is not related in any simple way to the domestication and ubiquity of digital technologies themselves. Denmark has higher levels of internet penetration, broadband access, smartphone usage, and tablet ownership than, for example, the US, and yet also has significantly lower levels of people sharing, commenting, and producing news online.

Indeed, the US stands out in this year's survey, as it did in the RISJ *Digital News Report 2012*, as having a far more widespread participatory culture online than most Western European countries, even those with higher levels of internet access. Japan, by contrast, has particularly low degrees of popular participation in sharing, commenting on, and creating news content online, despite being one of the most technological advanced countries in the world (in a way, this should be no surprise as the low number of Japanese reporting that they talk with friends and colleagues about news offline suggests low levels of interest in sharing at the outset). The results from Brazil, Italy, and Spain all point to more widespread participation online, though the numbers in all these countries have to be treated with some caution due to the lower levels of overall internet penetration in each, suggesting our respondents differ more from the general population there than elsewhere.

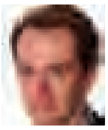
Conclusion

The results reported here document that the digital revolution is making uneven progress in several respects. While the rise of a few US-based digital intermediaries with global reach is a phenomenon that cuts across all the countries covered here, there are some significant differences in what people do online, both in terms of how people in different countries find news and in terms of the proportion of the online population in each country who actively engage with news by sharing it, commenting on it, or creating it themselves.

Throughout, it is important to keep in mind that despite decades of ongoing digitisation, news media use remains overwhelmingly cross-platform, a mix of digital and analogue, of broadcast, internet, and often also print – even amongst the youngest demographics surveyed here (18 to 24 and 25 to 34), online-only news use is a minority phenomenon and mixed-media use the norm. But the overall direction of travel is clear. Digital is growing ever-more important, analogue less so, more and more 'old media' are being rapidly digitised not only in production but also in terms of transmission and use. In the process, they are often transformed – even if sometimes in unexpected ways.

Assessing the democratic implications of these differences and explaining the different ways in which online news usage has developed in different countries will be a central part of understanding how journalism and democracy function in an increasingly digital media environment. Clearly, technology alone does not drive these developments. In future reports, we will continue to track both the similarities and differences in how these tendencies develop across the world.

Lagging Behind or Choosing a Different Path? Information Behaviour in Germany



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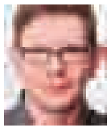

As the *Reuters Institute Digital News Report* in 2012 and 2013 both show, Germany is a quite specific case with regard to information behaviour. Germans seem to be more loyal to established (mass media) news sources, and they are less likely to embrace new and individualised news services. This essay starts with a synopsis of the characteristics of Germans' information behaviour and discusses potential reasons for these particularities. This discussion will provide a basis on which to answer the question whether these results indicate that Germans are lagging behind the international trend in the development of news consumption or whether Germans are rather choosing a particular path into the new media environment.

Specific patterns of news consumption in Germany

According to the Reuters Institute news survey, news consumption in Germany is characterised by the following pattern. General interest in news is quite high among Germans; regional news in particular is more important than in any other market, and there is much higher interest in political news than in say the UK.

Consistent with last year, traditional media (TV, radio and newspapers) are particularly strong in Germany: news from newspapers 63% (highest with Japan), radio 51% (second highest after Denmark, clearly above all the other countries), and TV 82% (third highest after Denmark and France) are used by the majority of the German population. On the other hand Germans are least likely to use online news (66%) and second lowest (21%, after France) in social media and blogs. In addition Germany is lowest in tablet use for news as well as in mobile usage for news, and Germans are least likely to pay for digital news. The relatively low level of use of mobile and other online services that are rather characterised by short headlines might be the reason for the finding that Germans are most likely to read longer stories or articles than people in other countries.

In terms of the Reuters Institute user typology, 58% of the German population belong to either the 'traditional only' (33%, highest percentage of all countries) or 'mainly traditional' (25%, second highest) segments of news users. As in other countries this percentage is lower among the youngest age group (20% 'traditional only', 21% 'mainly traditional'). The most frequent segments in the youngest age group are those who combine some traditional and some online sources (in sum 78%); this is an indicator for a pattern of news consumption which represents a balanced functional combination of established mass media and new individualised digital services.

The role of regional information in news consumption

The German information environment (for a recent overview see Schroeder *et al*., 2011) is characterised by the pre-eminent role of regional communication spaces. Starting with the four military zones after the Second World War, the 16 states (*Länder*) of the Federal Republic of Germany still form a constitutive framework for political and cultural life today. This has been mirrored by the development of a highly regionalised newspaper landscape with a dominant role of regional or even local newspapers published by regional or local publishing companies. Over recent decades, and particularly during the recent crisis of newspapers, a major process of concentration has taken place, leading to a landscape that is dominated by a few strong publishing houses; however, this process has not changed the fact that the majority of Germans read 'their' regional newspaper every day. Among the nine countries surveyed, Germany is the European country that comes out highest both in terms of those buying a newspaper once a week (56%) and those with a subscription that includes home delivery (33%).

The development of radio in the western part of the country – until the middle of the 1980s exclusively offered by public broadcasters – reflected the regional structure, too. Public broadcasting stations were founded for each state or in some cases for two or more states. After unification in 1990 this regional structure was applied to the eastern part as well. The legal framework for commercial radio is also defined by each of the single states; thus the most relevant commercial radio stations are acting at a regional level. As a result, apart from a few special interest channels in news, culture and classical music the German radio landscape is almost completely regionalised.

The role of national public television

Besides the strong role of regional information provided by regional newspapers and radio, television established itself as the dominant news source for national and international affairs. This was supported by the strong position of public service television. The main news show of the first national channel (*Tagesschau* on ARD) that has just celebrated its 60th anniversary is by far the most renowned source of information in Germany; this is also true for the younger age group between 14 and 29 years (Hasebrink and Schmidt 2013). For the German television industry the end of this news show at 8.15 p.m. marks the beginning of primetime for almost all channels. In addition, the main news show of the second public channel (*heute* on ZDF) is also established as a major news source. Given these long established benchmarks for television news and some unsuccessful trials with popular news formats, the bigger commercial channels in Germany have also invested considerable efforts in their main news programmes. As a consequence TV news in Germany still stands for high journalistic standards and trust and has a significant impact on public and political debate.

The limited role of public service media in the online world

In some countries relevant established news providers have been the pacemakers of online development. This is particularly true for the UK where the BBC – as the Reuters Institute data show – successfully transferred its leading role as a trusted traditional news source into the online world. In Germany, despite their leading role among the traditional sources, public broadcasters have been seriously limited by European and national regulation in the development of new services. Instead a number of print media publishers and even commercial news channels have become, at a relatively low level, the most important online sources. One can assume that an earlier and more determined engagement of public service broadcasters in the area of online news would have increased the number of users of online news.

The role of early cable and satellite infrastructure

Another specific factor that shaped the development of the German media environment was the early decision to invest heavily in cable infrastructure. As a consequence, as early as the 1990s German television households were able to receive a large number of free German language channels (30–50) while viewers in other European countries like the UK, France, or Italy had far fewer options to choose from. This offers one explanation as to why the more recent developments in media technology and media services – such as pay TV, digital channels, online services – were less successful in Germany than in other European countries. Given the large amount of high-quality programming available it was harder for new services to demonstrate their added-value.

The role of cultural differences

Whenever we observe comparative findings about intercultural differences in communication behaviour it is tempting to attribute them to cultural differences or to specific national 'mentalities'. However there is still no consensus in academic research about how to conceptualise cultural differences in communication behaviour. In addition, given the multicultural structure of many of today's societies, it might be misleading to look for a 'typically German' form of communication behaviour. As comparative communication research consistently shows, differences *within* individual countries are bigger than differences *between* countries. Nevertheless some findings from comparative research can indicate general patterns of media use and communication behaviour. One such observation suggests that Germans are less likely than people in other countries to embrace new technologies and be willing to experiment with all the options they might offer (Livingstone et al., 2011; Hasebrink, 2012); instead there is a certain tendency to emphasise the potential risks of a new technology. It is not possible to provide more than speculative reasons for this kind of intercultural differences; at least it seems to be a plausible indicator within the general syndrome of

German mentality, which might be characterised by a strong need for systematic and reliable structures – technical innovations tend to challenge traditional structures and thus cause some concerns. This interpretation is supported by the finding that Germans are least likely (1%) to state that news should challenge their own views; instead they expect news to be impartial (76%) or to support their own view (23%). The intercultural comparison reveals that Germans rather prefer familiar structures that are not challenged by new exciting technical features or critical opinions.

Conclusions

Taking into account these arguments regarding the German media environment, the specific pattern of news consumption reflected by the *Reuters Institute Digital News Report* looks highly plausible. Given a well-established, diverse, and trusted set of information sources, Germans seem to be less likely to change their patterns of news consumption than media users in other countries and the leading information brands from television, newspapers, and radio are doing well in retaining their important role. However, this does not mean that new digital services are not being adopted; Germans tend to keep their loyalties to established media while enhancing and supplementing their range of information sources with digital services. This is even true for the youngest group who, while they are most likely to make use of online news, still combine this with information sources provided by established media brands.

From a comparative point of view the level of digital news consumption is quite low; however, even in this country, the general trend towards digital news sources is obvious. Most Germans integrate online news into their everyday lives; as in other countries almost all members of the younger generations use a wide range of online services and combine these with traditional sources. In this way, established media brands play an important role as indicators of professional journalism – be it online or offline. The low readiness to pay for online news might be a consequence of the fact that most news media are offering their online news for free. Since Germans do actually spend quite a lot of money on newspaper subscriptions and the broadcasting licence fee, one can expect that there will be a shift from paying for these media to new services.

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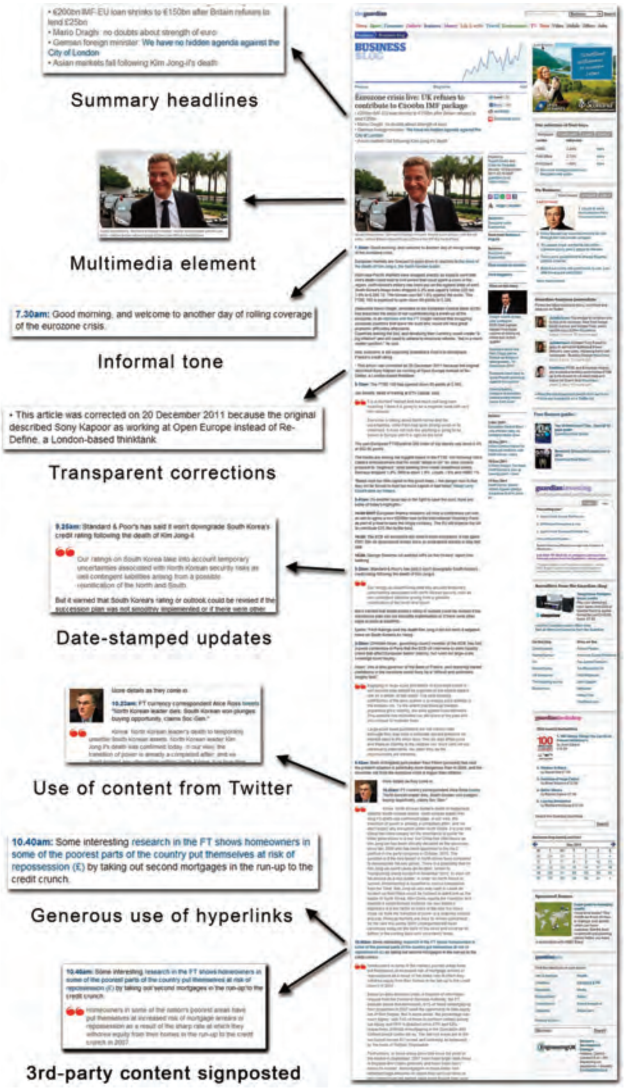
How Live Blogs are Reconfiguring Breaking News

Neil Thurman, Senior Lecturer in Electronic Publishing, City University London

Live news pages, also known as live blogs (see Figure 4.4 below), have become one of the most engaging formats for news online. According to the editor of the *Guardian*, Alan Rusbridger, who oversees the UK's second most popular newspaper website, live blogs outperform all other modes of online journalism.[22] Such anecdotal evidence is supported by hard data showing that live blogs receive more visitors for longer periods of time than conventional articles or picture galleries on the same subject (Thurman and Walters, 2012), and by their increasing prevalence at news sites worldwide, including NYTimes.com, FT.com, and BBC News online.

However, despite their popularity, live blogs have received scant attention from media researchers. The Reuters Institute surveys are helping to fill this gap by providing – for the first time – data on their consumption across a number of countries, and on news consumers' attitudes to live pages.

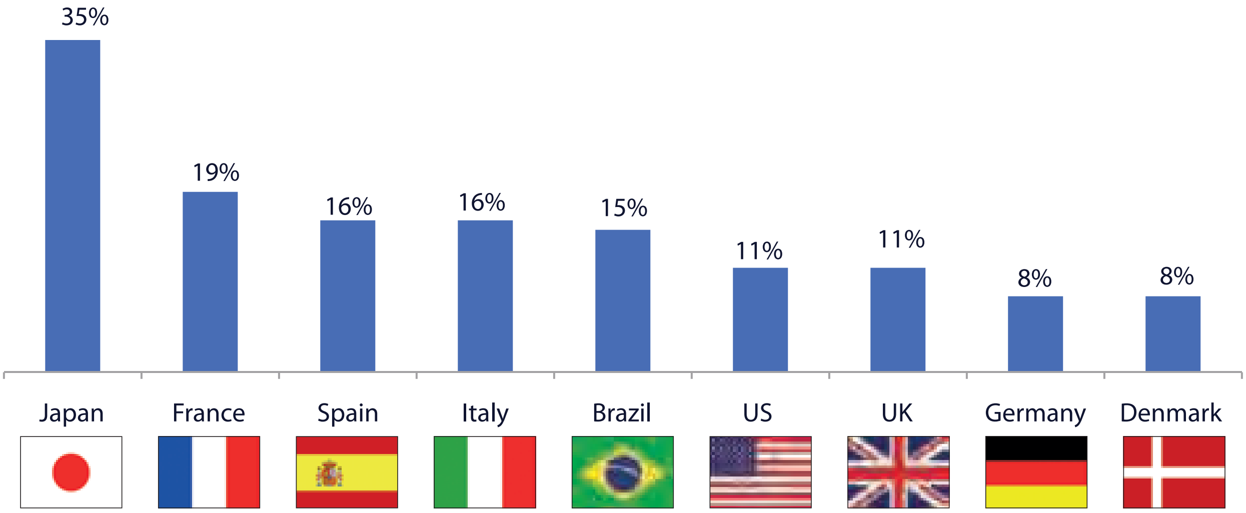
Figure 4.4: A live blog at Guardian.co.uk, with some typical features highlighted



Source: Thurman and Walters (2012). Reprinted by permission of the publisher (Taylor & Francis Ltd, http://www.tandf.co.uk/journals)

[22]Bob Franklin, personal communication, Mar. 2013.

Figure 4.5: Popularity of live blogs by country



Q11: Thinking of the way you looked at news online in the last week, which of the following ways of consuming news did you use?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

Both this year and last the surveys showed that 11% of UK news consumers had followed a live news page in the previous week. This year's survey reveals that live news pages are even more popular in the US, Brazil, Italy, Spain, and especially in France (19%) and Japan (35%). Because the survey took place at the same time as the French Parliament was considering whether to introduce same-sex marriage – a debate that was intensely followed due to the increasing number of French parliamentarians who are now on Twitter[23] – it could be that this figure is a result of the survey's timing. However, the French online news market is distinguished by the relatively high number of internet-only or 'pure players' – such as Slate, Rue 89, Mediapart, and Atlantico – whose innovations, including in their adoption of live blogs, have normalised the format in France.[24]

In Japan too, pure-player sites appear to be driving the popularity of live pages. Yahoo News Japan – the country's 'flagship' news website, used by 64% of Japanese news consumers in this survey – carries a 'breaking news' tab leading to a live page. The popularity of Yahoo News Japan, combined with the rather conventional approach to editorial presentation on the rest of its homepage, are, according to Yasuomi Sawa of *Kyodo News*, the likely explanation for the popularity of live pages in Japan.[25]

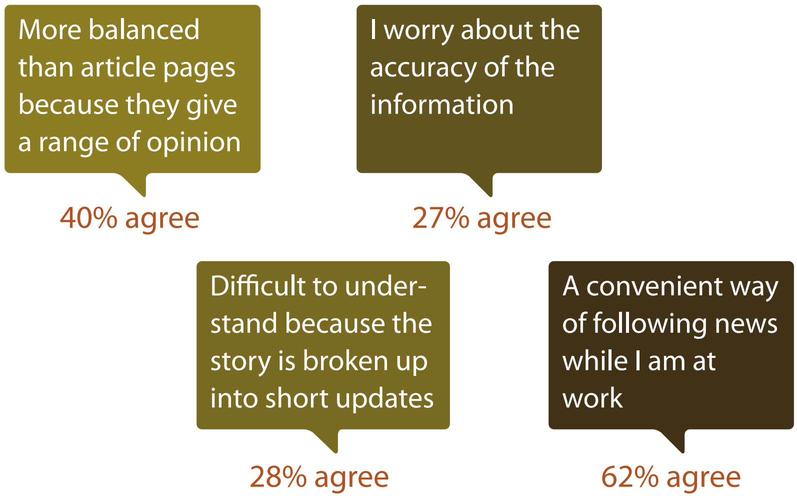
Live news pages are popular then, but with whom? The survey results show distinct differences between Spain, Japan, and the US – where they are accessed more or less equally by men and women; France, UK, and Brazil – where there is a moderate bias towards men; and Italy, Germany, and Denmark – where there is a pronounced bias towards men with, in Germany, more than twice as many men accessing live pages. In Germany live pages, known as 'news tickers', are used almost exclusively to cover sport events, in particular football, which have a significant male bias in their audience profile.[26]

It is unsurprising that live blogs are popular with heavy internet users. Typically running for six hours (Thurman and Walters, 2012), they demand repeated visits. Their reverse-chronological order and bite-sized updates – every few minutes or so – while essential characteristics of their ability to convey information 'as live', also present usability challenges.

This Reuters Institute survey shows that, in the UK, 28% of live blog users felt they were hard to understand. Although news organisations have been improving the usability of their live blogs by, for example, allowing users to read them in either chronological or reverse chronological order, they are likely to remain harder to understand than traditional news articles because they lack a conventional narrative structure, often have multiple authors, incorporate a range of external sources such as tweets, and make extensive use of quotes from – and links to – secondary sources.

[23] Nicolas Kayser-Bril, personal communication, 10 Mar. 2013.
[24] Jean-Christophe Pascal, personal communication, 11 Mar. 2013.
[25] Yasuomi Sawa, personal communication, 10 Mar. 2013.
[26] Christoph Neuberger, personal communication, 12 Mar. 2013.

Figure 4.6: Consumer attitudes to live pages



These characteristics are, of course, also an important part of the reason for their popularity. My own previous research (Thurman and Walters, 2012) showed that readers assessed live blogs' neutrality and balance positively. This survey confirmed this finding, with 40% of live blog users in the UK agreeing 'strongly' or 'somewhat' that they were more balanced than article pages because they give a range of opinions and routinely link out to sources and supporting documents. Only 12% disagreed.

Because live news pages are produced at speed, there is little time for live blogging journalists to undertake factual verification. What journalists do instead is work with trusted sources, for example, known Twitter accounts, and involve the audience in fact checking. This survey shows that more readers (35%) than not (27%) are unconcerned about any lack of accuracy in live blogs. In addition to their balance, live blogs' use of a greater range of primary sources and their transparent correction practices are also likely to have helped instil a degree of confidence about their objectivity. However news organisations should not take their readers' trust as a given. Live pages' compressed and frequent deadlines and informal tone may encourage the potentially dangerous publication of unverified information. As the *Guardian*'s Paul Lewis says, 'the danger in the rush to do regular updates is that we will make a really serious mistake' (Thurman and Walters, 2012).

The Reuters Institute survey also asked live blog readers in the UK whether they found the format a convenient way of following news at work. An overwhelming majority (62%) agreed 'somewhat' or 'strongly', with only 10% disagreeing. Of those respondents who said they access news at work or in a place of study, 17% use live blogs, significantly higher than the figure (11%) for all respondents. Live blogs are particularly suited to following news at work because they match readers' preferences for news consumption in that setting, by providing easy-to-monitor updates on a single page in a discreet, text-based format.

In this year's Reuters Institute survey we wanted to investigate the popularity of different types of live pages. To do this we used my classification of live blogs (Thurman and Walters, 2012), which divides the format into four types: News, Sport, Series/Subject, and Other Scheduled Event (see Figure 4.7).

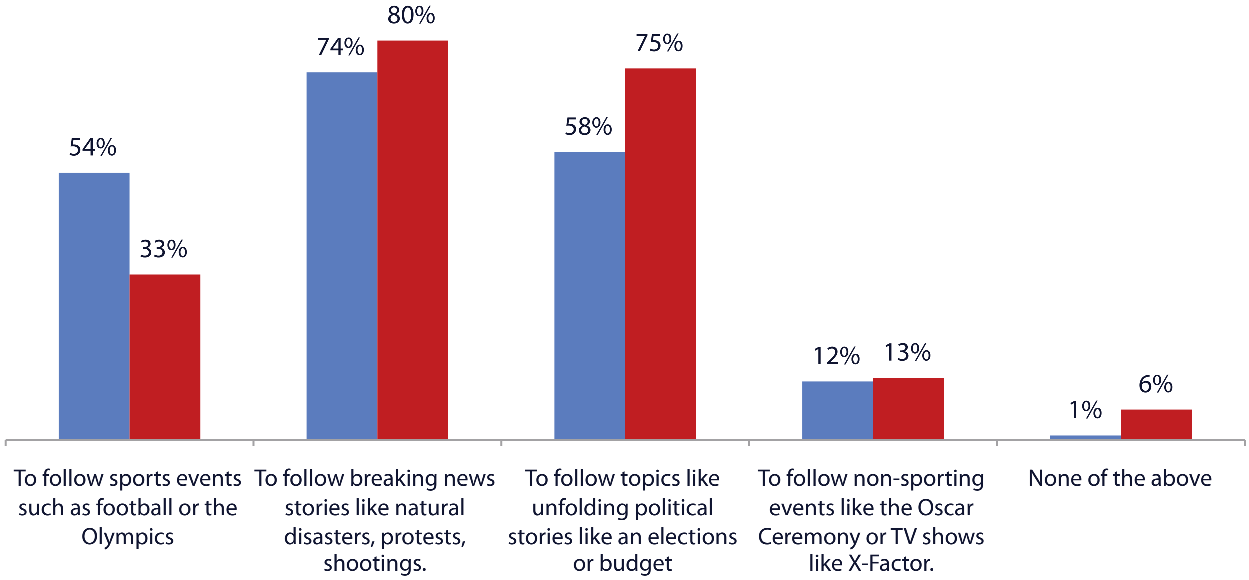
Figure 4.7: Typology of live blogs

Type	Characteristics
News	• Scheduled well in advance, semi-scheduled or completely unscheduled. • Major breaking news stories, generally with a more serious tone. • Examples include natural disasters, protests and riots, unfolding political scandals.
Sport	• Predictable • Casual in tone • High level of direct interaction with readers • Fewer multimedia elements • Links and multimedia elements often included for entertainment purposes, may not be directly relevant to story
Series/Subject	• Cover a subject, not a single story • Usually public affairs topics • Examples include: Politics Live, Middle East Live, and a Live Blog on planned reforms to Britain's National Health Service.
Other Scheduled Event	• Planned in advance and of finite duration. • Cover soft news, such as the Cannes film festival, the Eurovision Song Contest, and television series such as *The Apprentice* and *X Factor*, which are live blogged at the same time each week

Source: Thurman and Walters (2012). Reprinted by permission of the publisher (Taylor & Francis Ltd, http://www.tandf.co.uk/journals).

In my study of live blogs at Guardian.co.uk, I observed they were most regularly used to cover sport (37.6%), followed closely by the running, mainly public-affairs, news stories covered by series/subject live blogs (33.5%). Breaking news live blogs made up 21.9% of the total and scheduled events trailed at 6.8%. One might expect then, given the preponderance of sport live blogs *and* sport's popularity with online news consumers (see e.g. Boczkowski, 2010), for readers to favour sport live blogs over the other categories. This survey showed, however, that both news and series/subject live blogs are more popular than sport live blogs with both US and UK news consumers.

Figure 4.8: Types of live blogs consumed in the UK and US



QS14a/14b: You said that you use LIVE news page (short updates in chronological order) Thinking about this, please select the statements that apply to you.
Base: UK (n=2078) Use live pages (n=237) US (n=2028) Use live pages (n=213)

Could it be, then, that live news pages are making readers more interested in hard news and public-affairs content? While that may, for now, be an interpretation too far, what we can say is that, because the format has developed uniquely for the web, and matches so well with readers' consumption patterns, it seems to appeal as much through its form as its content.

Live blogs' appeal is likely being reinforced by the increasing consumption of news via mobile devices. 79% of mobile news consumers in the UK (and 77% in the US) say they use their mobile for accessing quick news updates during the day. Live blogs' short posts (which average about 100 words) suit smartphones' relatively small screens, and the frequency with which they update mean they warrant repeated daily visits. Some have been critical of how such rivers of news are augmenting traditional discrete articles – even going as far to accuse live pages of being symptomatic of the 'death of journalism' (Symes, 2011). However, although live news pages are meeting some readers' contemporary preferences for snacking on news, often on the go, they may simultaneously be delivering levels of participation and transparency, and an engagement with public affairs, that could contribute to journalism's reanimation.

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The Bottom Line: Do and Will Consumers Pay for Digital News?

Professor Robert G. Picard, Director of Research, Reuters Institute

Providers of news are focused on increasing digital revenues to replace income lost because newspapers, news magazines, and news broadcasters have experienced declines in audiences and advertising. Data in the *Reuters Institute Digital News Report* reveal consumers have increasing experience making payments and suggest their willingness and expectation to pay for news in digital forms is also rising.

Figure 4.9: Payment for digital news is rising

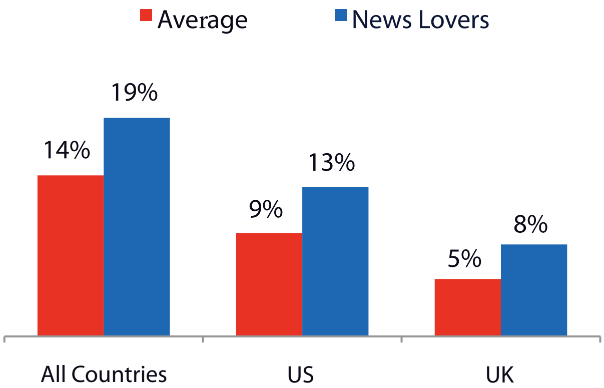
	UK	Germany	France	Denmark	US
Paid for digital news	9% (+5)	10% (+4)	13% (+5)	10% (-2)	12% (+3)

Q7: Have you paid for DIGITAL news content, or accessed a paid for digital news service?
Base: All markets UK (n=2078) US (n=2028) Germany (n=1062) France (n=973) Denmark (n=1007)
Percentages that said yes in the last week, month, year or longer than a year

The data indicate, on average, 10% of people have paid for news in some digital form – about one-third higher than last year. This growth rate is heightened because of the relatively low base from which it started, but it is clear that there is significant growth in consumers who have paid for digital news in countries such as the UK, Germany, and US.

The changing attitude towards payment is occurring because it is no longer a novelty and consumers are expecting more news providers to require payments in the future. Even among those who have never before made digital news purchases, willingness to pay for news in the future averages 14% overall and rises to 19% among heavy news consumers.

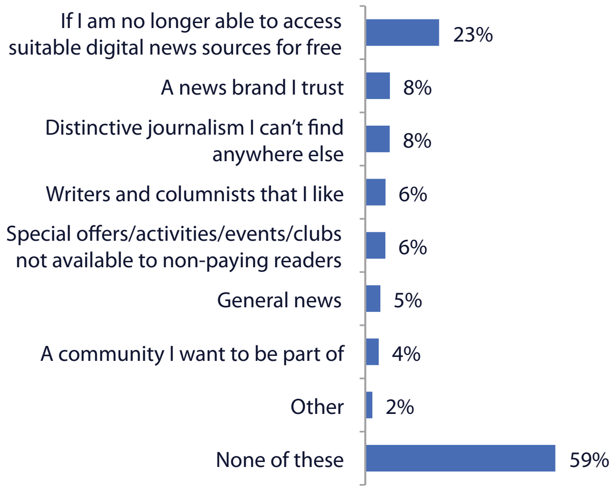
Figure 4.10: Percent likely to pay in the future



Q7b: You said you have not paid for digital content in the last year… How likely or unlikely would you be to pay IN THE FUTURE for online news from particular sources that you like?
Base: All (n= 11007); US (n=2028); UK (n=2078) Chart shows net very likely or somewhat likely

The primary reason that consumers expect to pay for digital news in the future is the declining availability of quality free news. This finding is seen in the UK data where 23 per cent of respondents cite it as the reason for expecting to pay, triple the amount for any other reason.

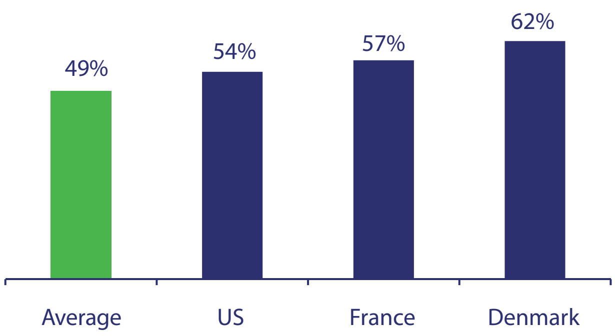
Figure 4.11: Motivations to pay for digital news sources in the future (UK)



QS18: You said that you don't currently pay for digital news, but what might motivate you to PAY in the future for DIGITAL news sources that you like?
Base UK : Those that don't currently pay for digital news (n=1862)

These data support the view that future digital news readers will be more committed to news and represent a smaller cross-section of the community than was previously served by print media in decades past. Digital news thus appears to becoming a product aimed at a niche audiences rather than a widely used consumer product. This is supported by the fact that an average of 48% of respondents reported they have never paid for a newspaper and thus large portions of that group are unlikely to suddenly decide to start paying for digital news. That figure is particularly pronounced in Denmark, France, and the US.

Figure 4.12: Percentage who have NOT paid for a newspaper in the past week



Q6: Have you bought (paid for) a printed newspaper in the last week?
Base: All markets (n=11007) France (n=972); US (n==2124) Denmark (n=1007)

Of those who have paid for newspapers, two important patterns emerge: (1) payments are made at news stands or shops and (2) home delivery or home delivery plus a digital subscription are involved. The high retailer purchases seen in Italy, Spain, UK, and Brazil indicate high single-copy sales methods; whereas the high print/digital subscriptions and home delivery found in Japan, Germany Denmark, and US indicate habitual subscription-based acquisition. These findings suggest that the predominant pricing methods for digital news purchases will also vary among nations, as publishers adjust to consumer payment preferences.

There are some general lessons to be learned from news organisations' pay experiences and professional and academic research to this point:

1. Commoditised news does not create economic value because providing the same or similar news to that of others provides no reasons for anyone to pay for it.
2. Willingness to pay is a matter of tradition and consumer expectation and platforms with better payment interfaces tend to have better payment take-up.
3. Consumer payments are becoming more important revenue sources on apps for mobile and tablets than for general online payments.
4. The presence of quality, free competitors affects willingness to pay. If quality digital news is provided free by newspapers or broadcasters in a market, there is reduced demand for paid news services.
5. Larger legacy news players have advantages when seeking digital payments because brand matters and only a few large players in each market currently are able to produce sufficient numbers of consumers to monetise digital activity well.

Experience also teaches lessons about the effects of instituting pay systems and reveals that rigid paywalls reduce website traffic between 85 and 95%. *The Times*, for example, lost 91% of its traffic when it instituted its system. This can be an acceptable business outcome if more income is gained from consumers than advertising revenue is lost due to reduced traffic. As consumer payments become the dominant revenue source, maximising audience is no longer the primary business driver; maximising income is.

Where metered paywalls – systems that allow readers to access some articles before requiring payment – have been implemented, the decline in traffic has typically been between 5 and 15%, thus making it possible to effectively generate both sales income and traffic-driven advertising income.

Cooperative pay systems are beginning to work for digital news providers in some locations; especially for small and mid-sized companies, because they create economies of scale, spread costs, and create easy access by new consumers. Two notable developments in joint pay systems have been Press+ in North America and Piano Media in Europe, which are now providing services to nearly 1,000 publications. Firms such as these provide the conditional access systems, payment infrastructure, subscription and single-payment management, and data analytics to publishers, making it easier for them to implement pay systems.

Public-affairs magazines are also finding it easier to get the public to pay than newspapers, especially on tablets, because digital payments for magazines are becoming the norm and they offer news analysis and commentary in ways general news sources do not.

Research is showing that users of digital services are now expecting to receive more than offline content when they use digital services. They expect to be in control of the experience, with the ability to make choices and influence consumption. In addition, they expect more and different types of content than are available in print, such as access to background information, more connections to original materials, more video, audio, and graphics, and better usability tools. Financial publications, such as the *Wall Street Journal* and the *Financial Times*, are serving this later aspect better than general news providers by providing various stock trackers, research reports, calculators, and investment analysis tools.

Developments in paid news have significant strategic implications for news providers. It is increasingly necessary to focus on customer needs. Because digital news is more competitive than print news, its business is about serving customers better than other providers, not just about the revenue needs of the company. If news providers get the first aspect right, the second part will be a natural outcome.

Today, a number of large players are generating 15–25% of their total revenue from digital media. In addition, the sizes of audiences being served are increasing 5 to 10 times because the digital platforms are attracting users who did not read the print news products. Some mid-sized players are also starting to harvest benefits.

These benefits are developing because the public is starting to make clear how it wants to use digital media and news organisations are learning how to align their content and pricing practices to this new environment.

Consequently, news providers are pursuing different strategies with regard to payments. Some (such as the *San Francisco Chronicle*) are pursuing freemium models, with some general and promotional content offered free and better or premium content behind the paywall; others a metered model, which allows limited access to a few articles as a marketing and ad revenue-generating strategy to irregular users. The majority of papers employing the metered system have set the limit for free access to 10–15 stories monthly. Others (such as *The Times*) employ 'hard' paywalls with payment required for all content.

For those newspapers and magazines that haven't yet begun charging, the key questions are when will they implement digital pay systems, what content will they charge for, on what platforms, under what circumstances, how, and at what price. Some may continue to pursue a free access policy for a time in order to build digital audiences (such as the *Guardian)*, but at some point most will switch to some sort of pay system to remain economically viable.

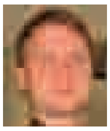
News organisations are increasingly offering separate pricing for print, web, tablet, and phone-based news, with many types of bundles for the services. Digital payments are scalable, allowing news providers to provide a variety of sales options including single articles, one-day access, weekly access, or monthly, quarterly, or annual subscriptions at different price points. Consequently, news providers will need to determine which option, combination of options, or bundling of platforms will be best for their various digital operations.

The most visible cases of publishers generating significant digital sales – such as the *New York Times* – must be viewed as exceptional, however. They tend to be leading national news providers in countries with large populations where digital sales become viable even if they only attract a small percentage of consumers or from countries that have a language (usually English) that can be read widely by international consumers. Digital products offered by *Bild* in Germany are thus likely to attract more paying consumers than *VG* in Norway and the *Washington Post* is likely to attract more international consumers than *Kronen Zeitung* in Austria. This does not preclude publishers in other nations, or smaller news providers, from pursuing opportunities and obtaining advantages from digital sales, however, but they will need to pursue tailored digital strategies with different expectations.

Paywalls alone are not to be expected to replace all the advertising revenue that news organisations are losing in the digital transformation process and user payments will be just one of a widening array of revenue streams: e-commerce, events, syndication, digital services, and income from non-media subsidiary enterprises. Although employing a range of revenue streams is new for many in the industry, it was common for news providers in the nineteenth and early twentieth centuries before advertising revenue grew so large that they were able to reduce other revenue-generating activities.

The data indicate improving prospects for digital news payments, but news providers will need to be realistic about financial expectations. The digital world will not yield income at the levels of the 1990s, but revenues and profits do exist. As the digital revenues rise – at different rates on various platforms – many print news providers will be increasingly pressured to shed the assets and cost centres that support print production and switch to digital-only production that is more readily supported by the rising revenue streams.

Smart TVs – the Final Frontier for Interactive News?



Dan Brilot,
Media Research Director, YouGov

An often quoted adage in the world of news and media is that 'content is king'. This year's Reuters Institute survey has provided plenty of evidence about the growing importance of tablets and smartphones. However, it's always worth remembering when looking through this kind of data that in fact 'context is king' and that ultimately the majority of media (and specifically news) is still very much consumed at home on the 'first screen': television.

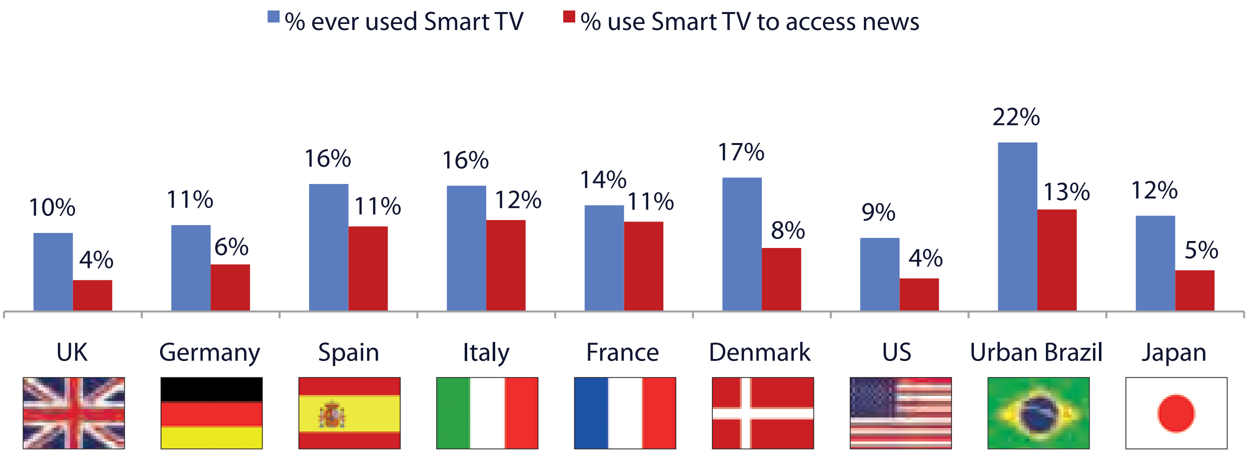
Television sets are still the only ubiquitous devices in the UK, with 97%[27] of the UK population with access to digital TV. We still observe the continued large-scale consumption of news on the big screen, with television news still the source used by the most people across most markets in the survey (the exceptions being Brazil and Japan). This is changing, especially with younger audiences who clearly state that they prefer online news, with the choice, the control, and the participation that this provides.

The arrival of connected or 'smart TVs' raises the intriguing possibility of bringing together the two things we love most - the TV and the internet - into a single device.

We define smart TVs as televisions that can connect directly to the internet without the help of another device like a set-top box. This is normally done via an ethernet or wi-fi connection. Penetration of smart TVs in most markets in the study is above 10% and growing at a slow but steady rate. Though smart TV penetration is rising very slowly in certain markets (like the UK) penetration is in fact a lot higher in other markets like Denmark (17%) and Brazil (22%).

We can also see that news is widely used by smart TV owners, with over a third (34%) of UK owners accessing news on their device, rising to nearly three-quarters (73%) of smart TV owners in France using it for that purpose.

Figure 4.13: Smart TV usage and usage for news by country



Q8a/Q8b Which, if any, of the following devices do you ever use for any purpose/ have you used to access news in the last week?
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)

[27] http://www.thinkbox.tv/server/show/nav.989

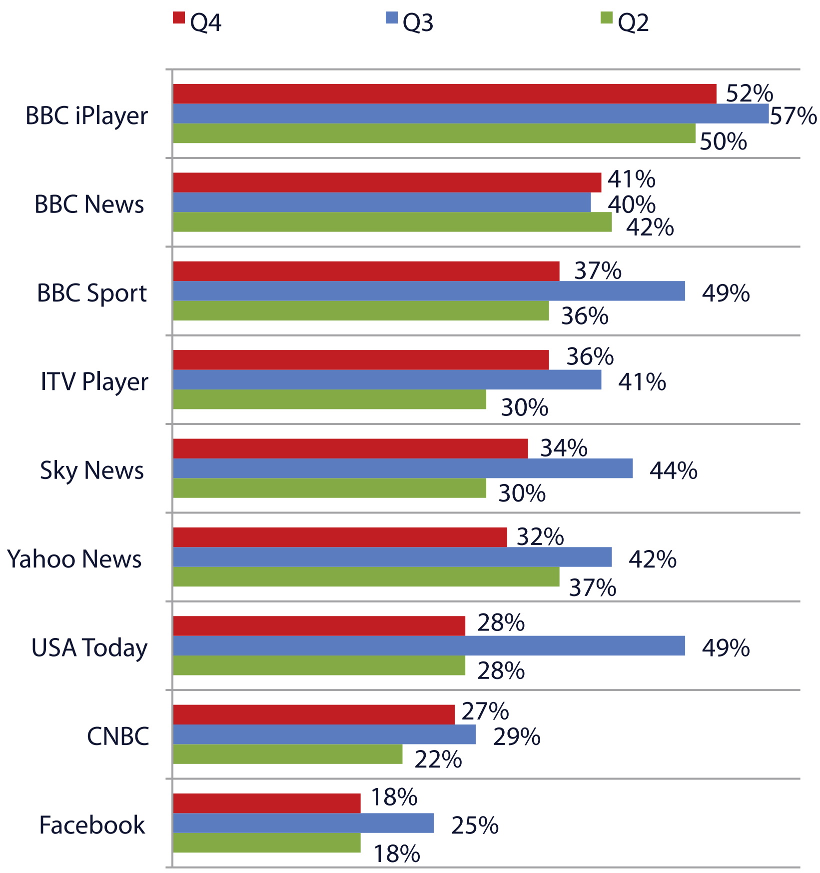
With a big push from consumer electronics manufacturers to make all large new televisions 'smart', it is anticipated that penetration and usage will grow rapidly. According to global technology specialists Gartner, 85% of all flat TVs produced by 2016 will be smart TVs.

So what impact will this technology adoption have on our consumption of news and specifically on television-delivered news? YouGov has been tracking the growing usage of linear and on-demand services on smart TVs since the start of 2012.

Our surveys show that video on-demand services (such as the BBC iPlayer, YouTube, Netflix, and Lovefilm) are the biggest factor driving both purchase and usage of smart TV devices. But we also find that news is the third most common application (behind linear broadcast and catch-up TV) for smart TV owners in the UK, with well over a third (38%) of UK smart TV owners accessing online news services on a weekly basis.

More specifically, throughout last year we have seen significant increases amongst smart TV owners' usage of a range of 'apps'[27] in the UK, in particular in the third quarter of 2012 where we saw large jumps in news (and sport) app usage, most likely associated with finding out news and information around the Olympic (and potentially the Paralympic) Games.

Figure 4.14: Most popular applications accessed via Smart TVs (UK)



Source: YouGov Smart TV Tracker, Q2 & Q3, Q4 2012 – proportion of App users who access on a weekly basis (various base sizes).

What this demonstrates is a desire to find out more information related to 'live' events at that moment on that device. Very often 'second screens' are used to 'dig deeper' into an event to find out more information relating to a TV event but it now seems that that capability also sits well on our 'first screens'.

We also see global news brands such as Yahoo, USA Today, and CNBC gaining traction in UK living rooms on the big screen – mirroring the kind of developments we have seen with the internet over the past decade. Part of the picture could be the fact these are the kind of apps that come preloaded with some TVs and also feature prominently in smart TV apps stores. However, that said, the increase in usage is also down to consumer appetite for the content that they provide.

The openness of smart/connected TV platform and the ease with which apps can be created using web technologies opens up new opportunities for traditional

[27] An 'app' refers to application software. This is a term used to describe computer software that causes a computer to perform useful tasks beyond the running of the computer itself.

Figure 4.15: The Guardian's TV news app

news brands across many markets. Last year, the *Guardian* launched a smart TV app in the United States, alongside its web and mobile portals aimed at American audiences. Previously, getting carriage via the US cable networks would have been an expensive and tortuous process.

We also notice this trend in other markets, especially in Germany where smart TV penetration is higher (already in Q2 2012 it was 11%) and where we see 'accessing new services' usage higher than any of the other smart TV applications, with just under a third (29%) using news services on their smart TV on a daily basis. France also appears to be a market where news consumption on smart TVs is particularly prevalent, with 11% of the survey sample accessing news on their smart TV (this is a very high proportion of the overall 14% who use a smart TV). Part of this may relate to the early adoption of interactive news on television in France, with a pioneering system called Antiope and later versions of teletext.

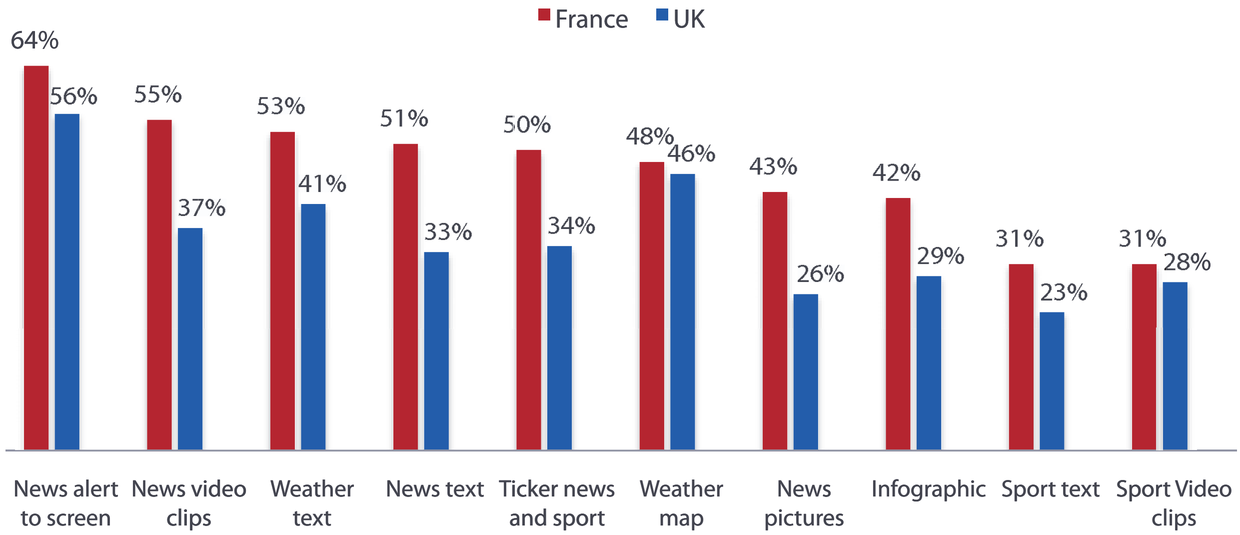
Whilst it might appear at first to be counter-intuitive to have text-based content on a big screen, there are a number of other successful precedents in Europe. The BBC 'Ceefax' service ran from 1974 to 2012 in the UK and was a text-based service delivered on a television with a focus on time-sensitive text-based information, such as breaking news, financial stock prices, weather, TV listings, and sport. The BBC red button service now continues to provide not only visual but text-based information, with 45% of the UK population using the service on a monthly basis.

But news providers are still uncertain whether internet-style content will work on a shared 'lean back' device with a large screen. To understand audience demand for different types of content, we asked a series of questions in both the UK and France (Figure 4.16).

When asked about the specific appeal of internet-delivered news content, the most appealing concept across both markets was a breaking news alert (that is pushed to the corner of your screen for a short time), which appealed to just over half (56%) of the UK population and almost two-thirds (64%) of the French one.

Weather-related services also fared well. Sports news (text and video clips) was popular with men but of very little interest to women. News lovers – those with a high interest and frequency of access (20% of the sample) – were more likely to show interest in all these categories.

Figure 4.16: Interest in possible Internet news formats via a TV screen

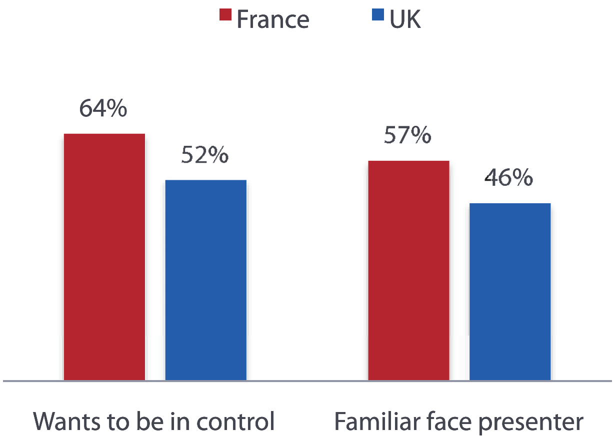


QS15 Thinking about the possibility of accessing internet news services via your television, how interested would you be in the following types of news
Base: France (n= 972),UK (n=2078)

The popularity of news alerts is in some way surprising because it actively interrupts linear viewing, as opposed to other propositions which would require an active decision to go to a menu system to access internet-based content. Even so, it seems that there is a genuine appeal for disruptive 'push' functions, in particular when breaking news is concerned, even when consumers are in 'pull modes' of consumption.

We often hear of this 'pull mode' more commonly referred to as the television 'lean back' (passive) medium, where content is just consumed, versus internet-delivered 'lean forward' (active) media, where consumers have an opportunity to either make decisions about what content they want to receive (beyond merely the ability to change channel or time-shift) or indeed contribute towards that content or towards the discussion around that content. The complication around internet-delivered services, whether on a smart or a connected TV, is to do with the device being a shared device (as opposed to laptops, tables or smartphones which are mostly 'personal' individual devices). However, for news (which could be relevant for all members of the household), this objection might not be an issue (in the way that it is e.g. for social media usage on shared devices such as the television). We observed that when asked if consumers wanted to 'be in control of my news experience') almost half (46%) of the UK sample agreed, with this number rising to almost two-thirds (64%) of the French sample agreeing. This clearly shows the desire to move from a top–down model of news communication to one where user choice (beyond merely being able to switch channels) will be a factor in the design and delivery of television-based news services in the future.

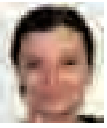
Figure 4.17: Interest in 'internet style' news content on a TV screen



QS16 : When thinking about getting internet news via your televisions to what extent do you agree or disagree with the following statements?
Base: France (n= 972) UK (n=2078)

Smart or connected television seems to be a natural fit for the delivery of news content, particularly for 'push' notices of breaking news and also for in-depth reportage when consumer just don't have enough from their standard TV bulletin. This feeds into our basic desire to always be kept up to date and the ability to dig deep into a story beyond the headlines. Interactive news and information content is now available on any screen and, as our homes become increasingly connected, that news passes more and more fluidly between the small and the big screen.

Demographic Divides: How Different Groups Experience Online News



Alison Preston, Head of Media Literacy Research at Ofcom

This report has focused predominantly on providing clear analysis of how users in different countries vary in their online news behaviour. This essay focuses on the UK in particular, and examines some key subgroups – age, socio-economic group,[28] and gender – to provide a more nuanced picture of the variations that can be found relating to news habits and attitudes.

Do men and women have significantly different news consumption habits, and do they find the same types of news important? Are younger people consuming more or less news than older age groups, and do they interact with news in different ways? What role does socio-economic group play in consumption habits?

The essay begins by setting out the importance that people attach to different types of news. It describes which platforms are used for news, and shows the different types of source people say they use for political and for entertainment news. It examines how different groups find online news – the gateways through which they navigate – and describes the types of online news used and the extent of interactivity carried out.

It is important to remember at the outset that this survey is based on online users of news – older people are less likely to have internet access by a considerable margin (46% of 65+ compared to 90% of 16–24s in 2012[29]), and so differences in habit and attitude are certainly even more stark than these findings suggest if widened out to the UK population as a whole. The analysis of differences by age can also offer an indication of the possible direction of travel in news consumption, if younger people's habits endure as they get older.[30]

The importance of news

First of all, how personally important do people find various news topics? Figure 4.18 (overleaf) shows that, for almost all news topics, online users aged 65+ are more likely to rate them as important than those aged 18–24. The divergence is particularly great for local and regional news and economics news – and even news about the UK is something that 75% of 65+ say is important compared to 61% of 18–24s.

This indicates a greater overall engagement among older users with news, which tallies with findings elsewhere,[31] as well as their more frequent news consumption.

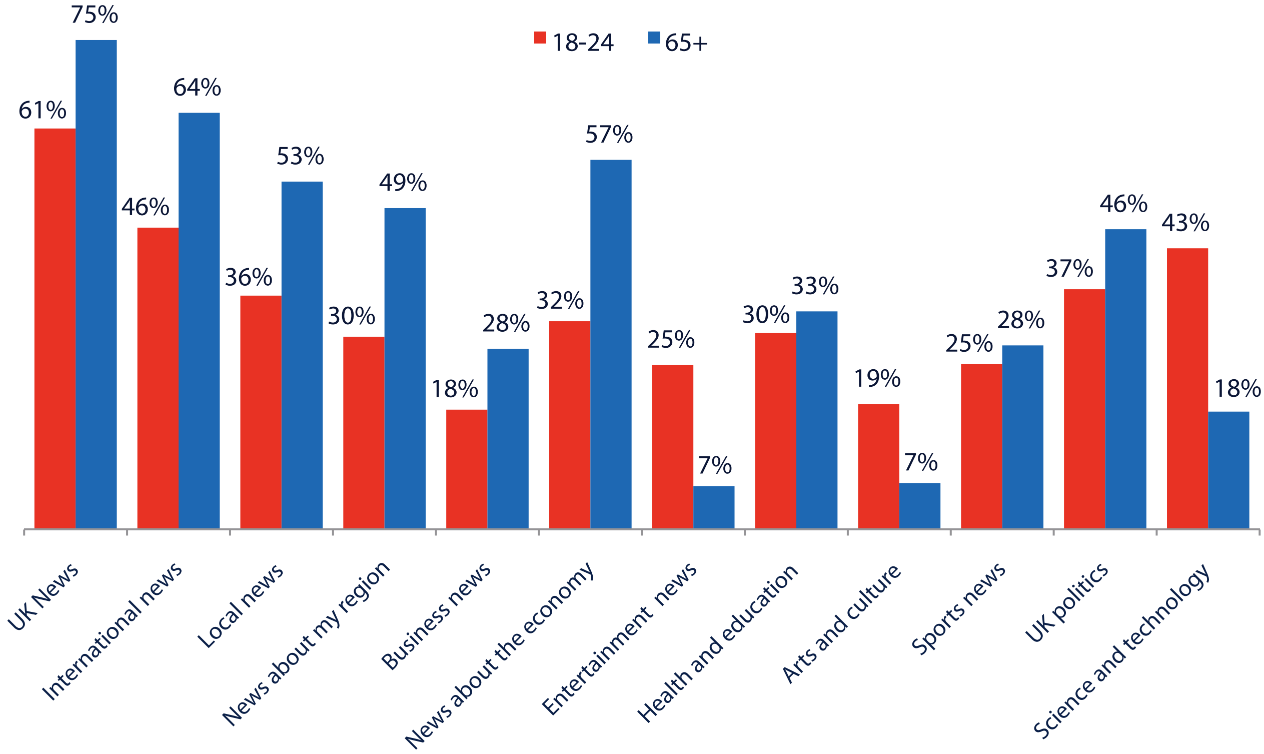
The three exceptions are science and technology, entertainment and celebrity, and arts news, where younger people are far more likely than older people to find these personally important. Indeed, the 25–34 age group (not shown on the chart) is most likely to find entertainment and celebrity news important (37%) compared to 25% for 18–24s and 7% for 65+ (see figure 4.18 overleaf).

Turning to differences by socio-economic group, online users in C2DE households are more likely to find local and regional news important than those in ABC1 households (59% of C2DEs say that local news is important compared to 44% of ABC1s). People from AB households are over twice as likely as DEs to find business and financial news important – 28% vs 12%, and considerably more likely to find UK political news important – 43% vs 33%.

There are many gender differences, with women finding local and regional news more important, and men business, financial, and economic news. Women are twice as likely to find health news important (38% vs 18%) and three times as likely to nominate entertainment and celebrity news – 29% vs 10%. Men are three times as likely to nominate sports (49% vs 15%) and twice as likely to nominate science/technology (29% vs 16%).

[28] Socio-economic group refers to the 'common currency' social classification (the 'ABC1' system) employed throughout marketing, advertising, and market research. The classification assigns every household to a grade, usually based upon the occupation and employment status of the chief income earner, but in some cases using other characteristics.
[29] Ofcom, *Communications Market Report* (2012).
[30] See Ofcom's Communications Market Report (2012) for a discussion of the 'generation gap' in relation to communications media in general, and whether there are signs that media behaviour among younger people remains similar as they get older (cohort effect) or gets modified as their life stage shifts (life-stage effect).
[31] See Kantar Media, *Measuring News Consumption and Attitudes* (Ofcom, June 2012).

Figure 4.18: Personal importance of types of news



Q2: Which of the following types of news is most important to you? Please choose up to five
Base UK (n=2078) 18-24 (n=249), 65+ (n=379)

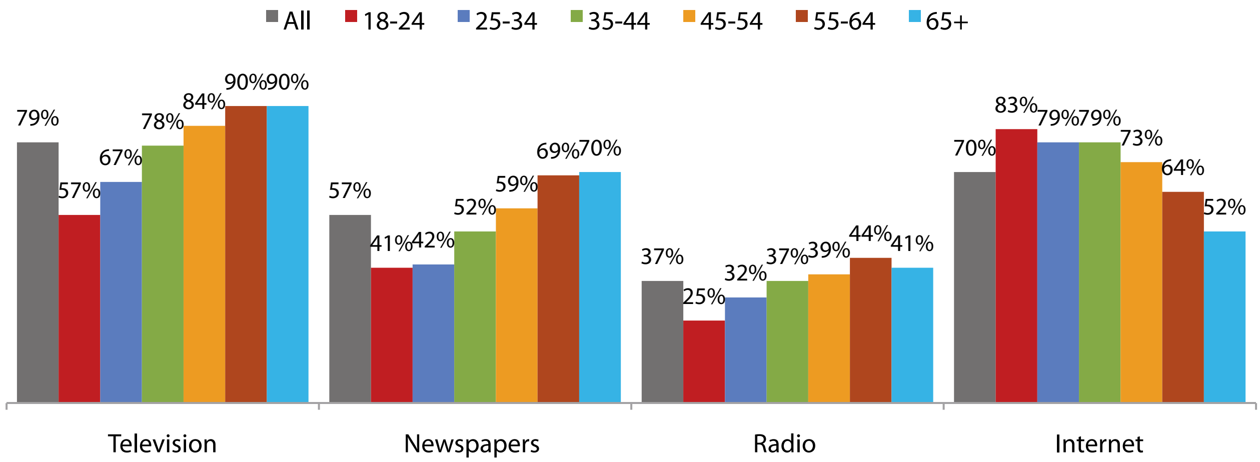
Use of platforms for news

Given the survey sample is one of online users, the internet is a key news platform for most age groups, as Figure 4.19 shows. That said, television remains the most-used platform for news at an overall level (79%) and for those aged 45+.

Differences between age groups are substantial – 57% of 18–24s said they'd accessed news on TV in the last week, compared to 90% of those aged 55+. The figures are reversed for online news access, with 83% of 18–24s saying they use the internet for news, compared to 52% of those aged 65+. Newspapers are also much more likely to be used by older groups (70% of 65+) than younger groups (41% of 18–24s).

Turning to socio-economic groups, there is no difference for the use of TV across each individual group. However, there are considerable differences for radio: 47% of people from AB households use the radio for news, compared to 28% of those from DE households.

Figure 4.19: Use of platforms for news



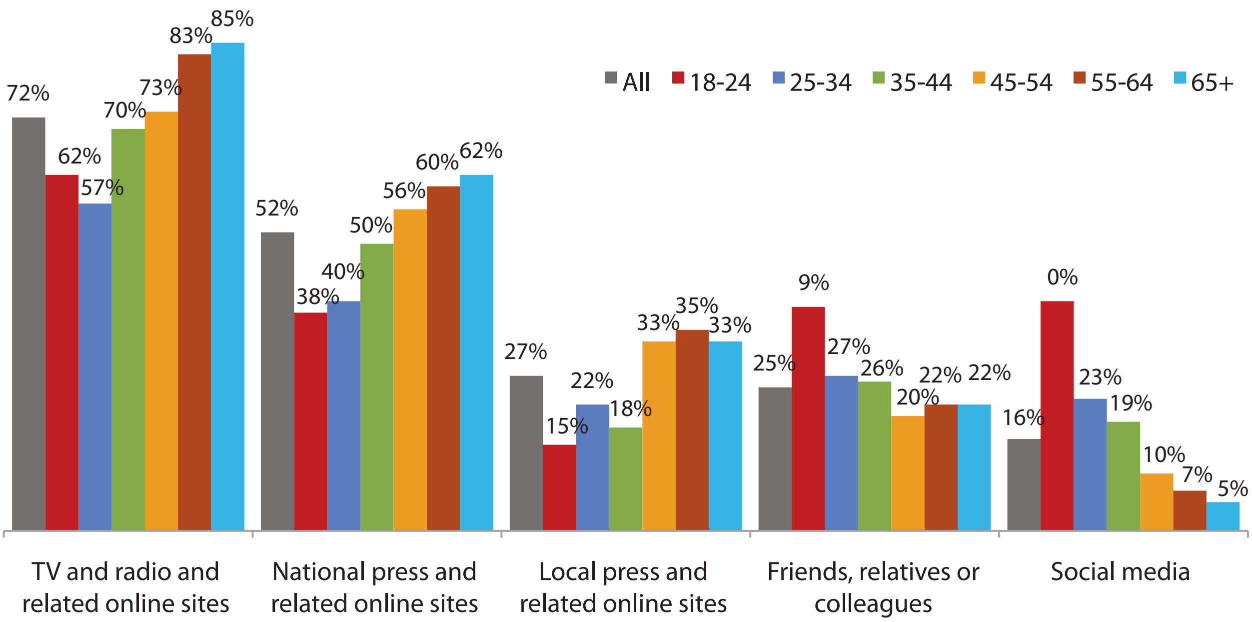
Q3: Which, if any, of the following have you used in the last week as a source of news?
Base: UK (n=2078) 18-24 (n=249), 24-35 (n=352), 35-44 (n=351), 45-54 (n=385), 55-64 (n=361) 65+ (n=379)

Sources used for different types of news

As well as understanding which sources people say they use in general, we wanted to see whether news sources differ for different types of news. When asked which types of ways they used to keep up with political and government issues, older people are more likely to say they use broadcast and print sources. The pattern for younger people is quite different – some two in five 18–24s say they use word of mouth, and social media, to find out about these issues.

Online news users from AB households are more likely to say they use national press sources than those in DE households (60% vs 50%), and more likely to use specialist magazine sources (11% vs 4%).

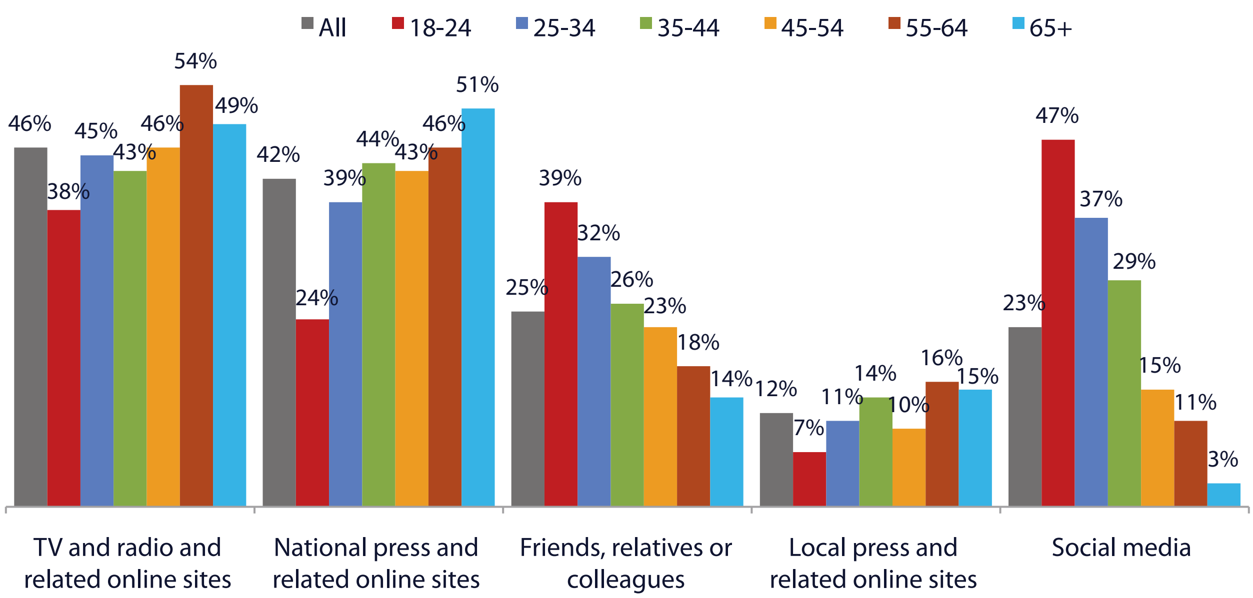
Figure 4.20: Sources used for different types of news – political and government



QS4b: Which, if any, of the following sources of information do you use to keep up with political and government issues? Please select all that apply.
UK base sizes (as above)

Turning to entertainment news, the picture is more mixed (Figure 4.21). TV and national press dominate overall, but for younger groups, word of mouth and social media are as likely to be used as the national press and TV. The national press is less likely to be used by 18–24s.

Figure 4.21: Sources used for different types of news – entertainment and celebrity



QS5a: Which, if any, of the following sources of information do you use to keep up with entertainment and celebrity news? Please select all that apply
UK Base sizes as above

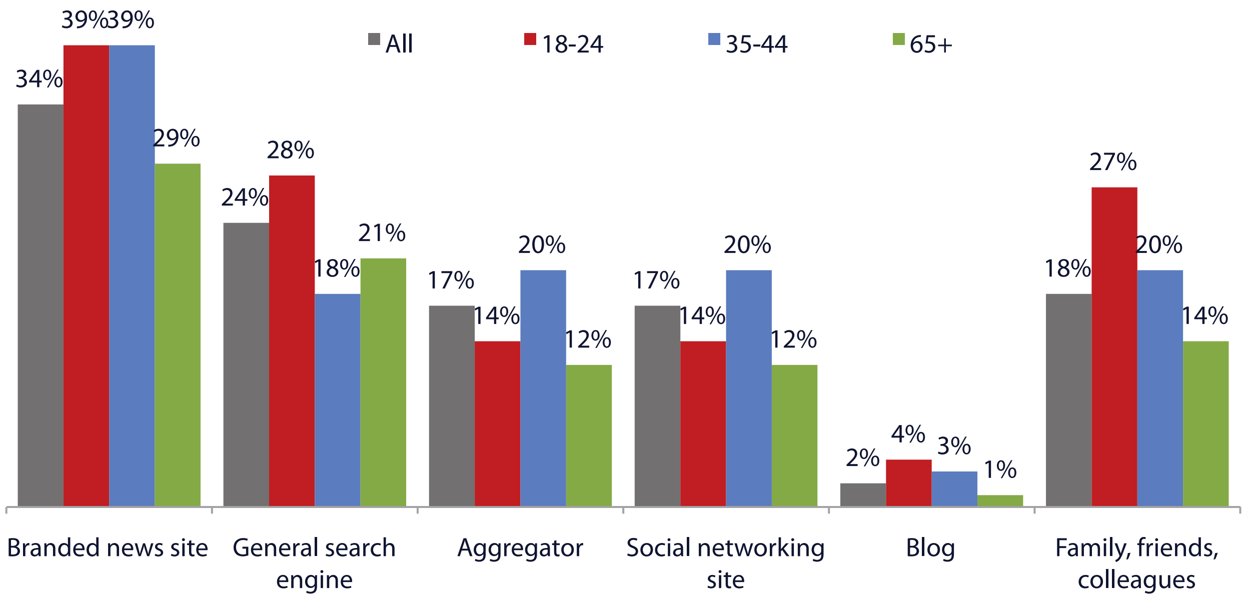
Gateways to online news

The ways that people find news is very important to monitor – discoverability patterns are going to be an increasingly important arena for competitive news providers.

Figure 4.22 shows how different age groups say they find news online. Respondents could nominate up to five ways, and so the higher overall numbers for those aged under 45 indicate they are more likely to use a variety of means, with those aged 35–44 most likely to do so. Branded news sites are the most popular means for all age groups. However, for over one quarter of 18–24s, search engines and word of mouth are used (28% and 27% respectively).

In terms of socio-economic group, ABs are much more likely than DEs to use a branded news site (39% vs 25%). Otherwise, there is little difference for most elements including search engines or social media. People in DE groups are most likely to say they don't know how they find their news (25% compared to 12% of ABs).

Figure 4.22: How users come across online news



Q10. Thinking about how you FIND news online, which are the main ways that you come across news stories? (Please choose up to five)
UK Base sizes as above

When these types of gateway are aggregated, at an overall level a majority (54%) say that they mainly access news via a branded news provider. Each age group is also more likely to give this response. However, one-third of 18–34s say that they mainly access news via a search engine, social network, or aggregator, and this is also true of one in five online users aged 45+.

New ways of reaching news content are thus the norm for a significant minority of online news users, and if younger people continue to use these newer forms of discoverability as they grow older, then branded news as a core means of navigation looks set to diminish further.

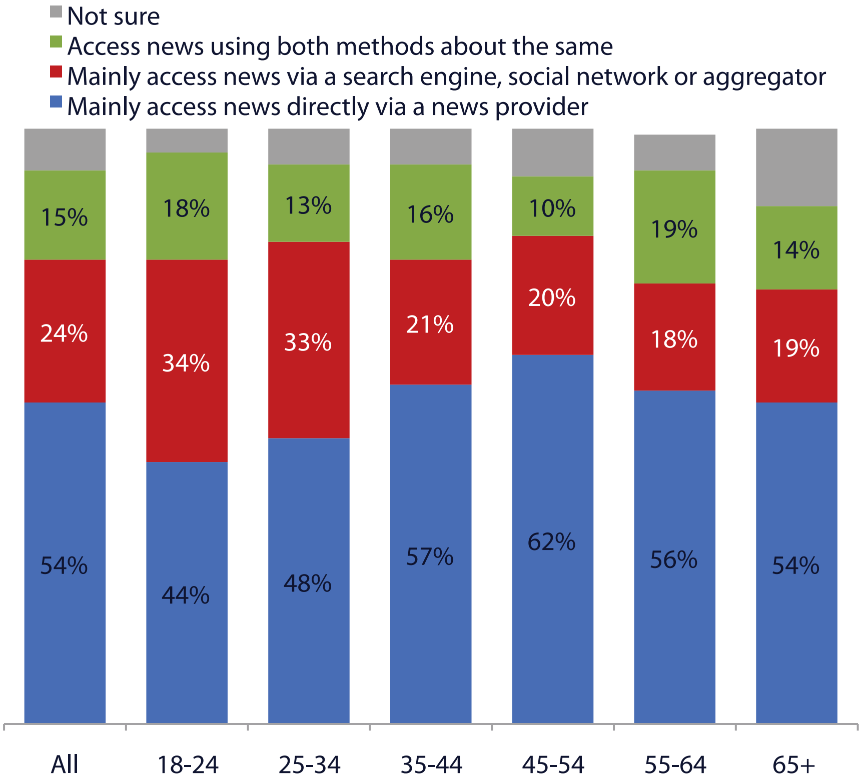
Types of online news source

In addition to understanding how people get to online news, it is also important to identify which types of online news content they are using. As Figure 4.24 illustrates, 'traditional' news media dominate in terms of news source, for younger groups as well as older groups. Nearly half of online news respondents (45%) say they use broadcast websites, and 35% that they use newspaper websites. The dominance of broadcast websites is most probably attributable to the BBC News website.

Younger age groups are more likely to say they use various types of online news source, with older age groups being less likely to nominate a variety of news sources overall. Two in five 18–24s say they use social media for news, and three in ten 25–34s.

By gender, men are more likely than women to use most online sources, although there is no difference in the use of social media for news.

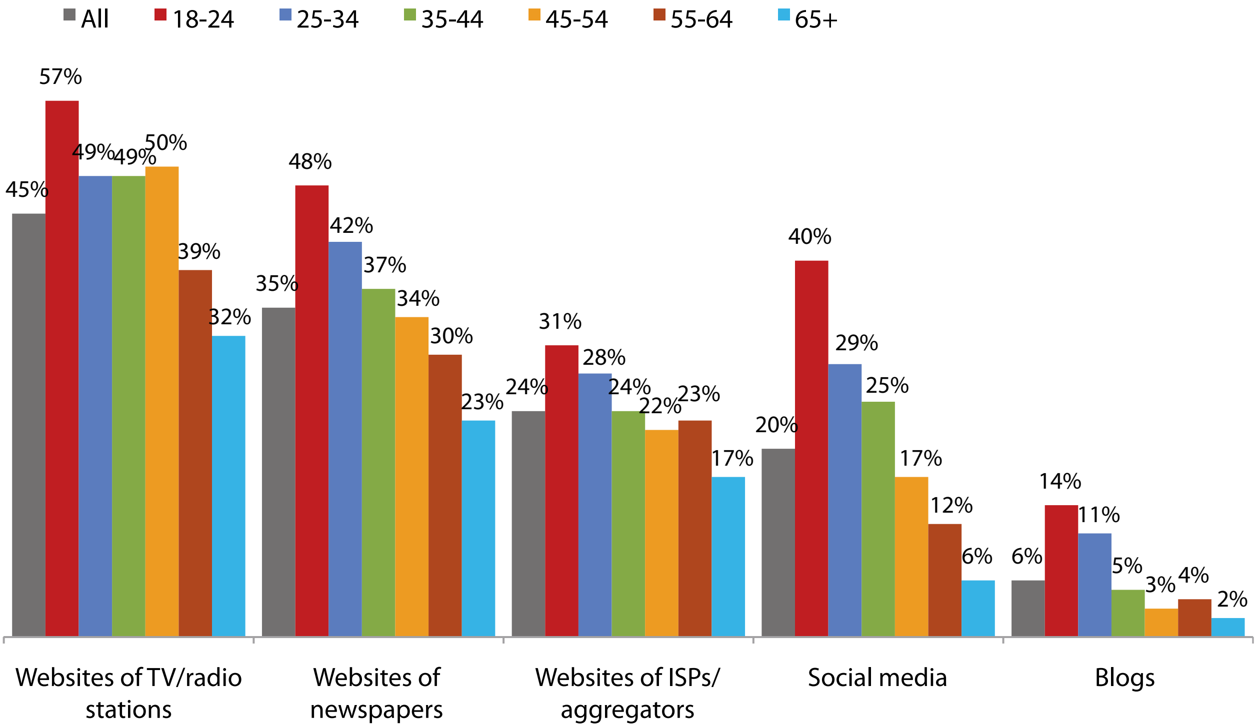
Figure 4.23: Main ways of accessing news online



QS12c: Thinking specifically about when you look for news on a LAPTOP OR DESKTOP computer, which of the following statements most applies to you? Please select one answer.

Base: All who have accessed news via a pc/laptop in the last week (n=1394 weighted, 1405 unweighted)

Figure 4.24: Types of online news used



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

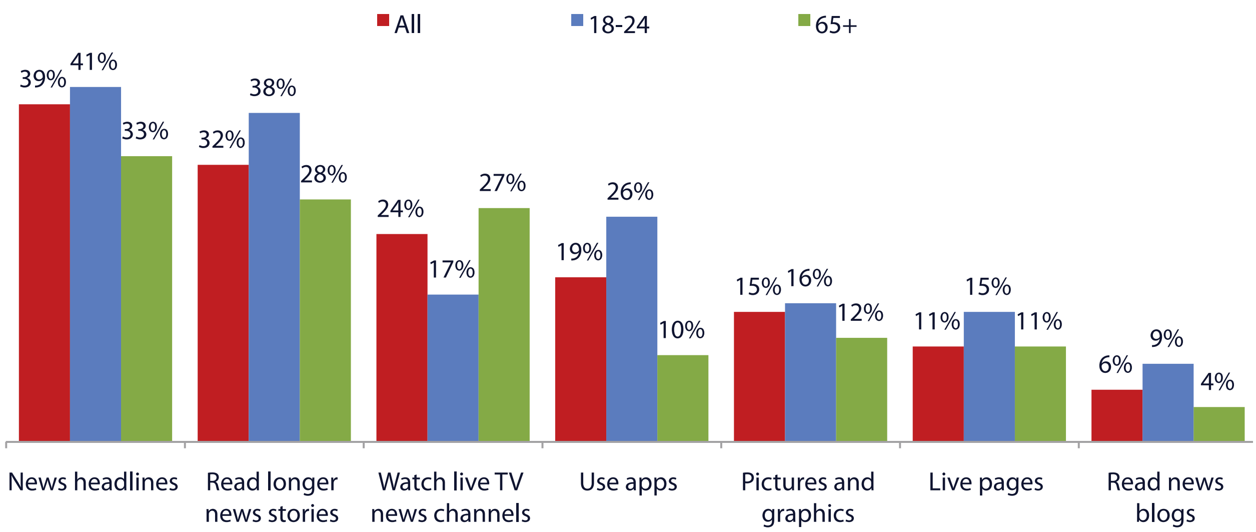
UK base sizes as above

We also asked online users to nominate the ways that they were accessing news content, to gauge the extent to which people are reading or watching news, or using other means of consumption. As Figure 4.25 shows, print-based use is most common, with two in five saying they read news headlines and one in three saying they read longer news stories. Around one-quarter say they watch live TV news channels online, with those aged 65+ more likely to do so than 18–24s. Conversely, 18–24s are more likely to use apps, and to read news blogs, than older users.

It is of note that older users, despite being online, are employing 'traditional' means of consumption on the platform. It will be interesting to see whether this pattern changes as the older user base grows, or whether this will endure for some time to come.

People in AB households are more likely to look at headlines (41% vs 33%) and read longer stories (36% vs 24%) than those in DE households, although there is no difference in terms of watching live TV online.

Figure 4.25: Types of online news used

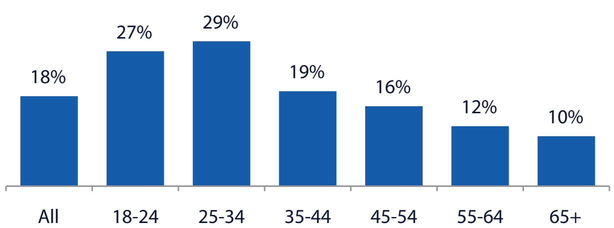


Q11: Thinking of the way you looked at news online in the last week, which of the following ways of consuming news did you use?
Base UK (n=2078) 18-24 (n=249), 65+ (n=379)

Interaction with online news

Finally, this essay examines the demographic differences in relation to how people share news online. Figure 4.26 shows the extent to which news users are active in terms of sharing news stories online. Three in ten (29%) online users aged 25–34 say they have passed on a link to some type of online news story, and a quarter (27%) of 18–24s. This decreases to 10% of online users aged 65+. Overall, nearly one in five (18%) of online news users say they have shared a story.

Figure 4.26: Whether shared news stories online



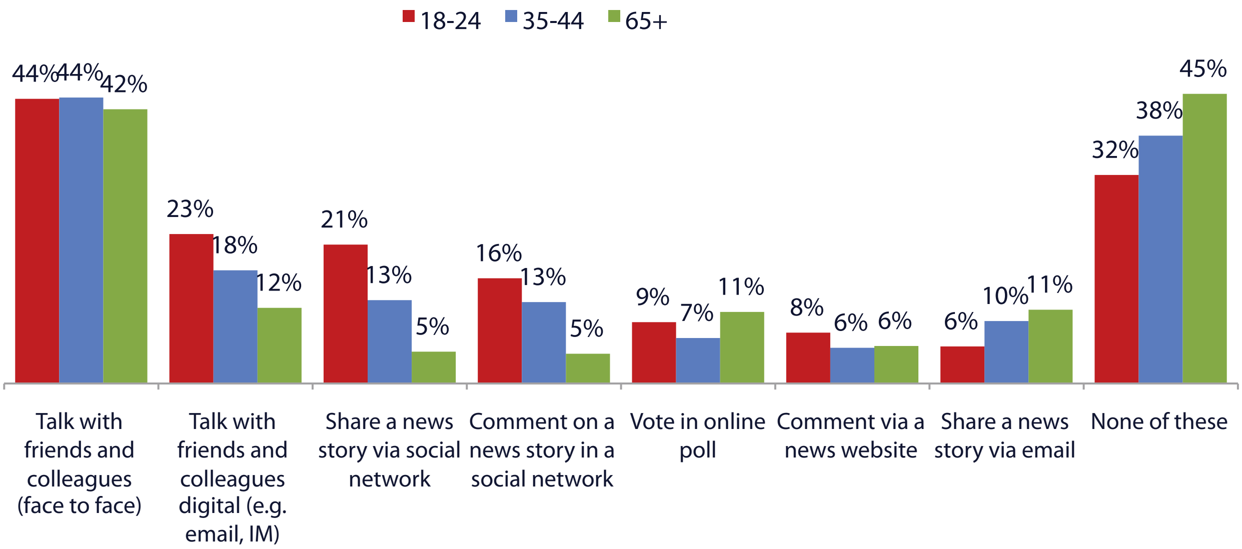
QS8b: Thinking about how you share news, in the last week have you passed on a link to an online news story, video etc. via email, social
UK base sizes as above

Those from AB households are more likely to say they have shared a story than those in DE households (21% vs 15%), and men (21%) are more likely than women (16%) to say they have done so.

Online users were also asked to nominate the various ways that they share or participate in news coverage. Nearly half (44%) say they do this face to face or on the phone, while nearly one quarter (23%) of 18–24s say they communicate online about a story. One in five 18–24s say they share a news story using social networking, and around one in eight of this age group say they comment on stories. Online users aged 65+ are far less likely to comment or share stories in this way, although they are more likely than 18–24s to share a story via email.

There is little difference by socio-economic group, but men are more likely than women to say they vote in an online poll (13% vs 9%) and comment on a news story on a news website (10% vs 5%). Women are however more likely to say they talk with friends and colleagues face to face or on the phone (49% vs 39%).

Figure 4.27: How users interact with news



Q13: During an average week in which, if any, of the following ways do you share or participate in news coverage? (select all that apply)
UK base sizes as above

In summary, we have seen a variety of differences between different ages, socio-economic groups, and gender. Younger people are, unsurprisingly, more likely to be employing newer, less news-brand-oriented, means of navigation. That said, one in five older users say they mainly access their news via these means. In terms of consumption, younger users are more likely to be accessing news in a variety of ways, although overall older people are more frequent consumers of news.

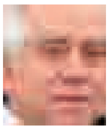
Online usage for older users is more likely to be 'traditional' in focus than younger users. However, it is important to note that, across various measures, there are three broad age groups where activity is largely similar – those aged under 35, those aged between 35 and 54, and those aged over 55. In other words, while for much activity 18–24s are at the vanguard, 25–34s are often not far behind.

There are differences by gender, particularly in relation to the types of news that men and women find important, and to the use made of different types of online news source. While men are more likely to share stories online, women are more likely to talk about them in person.

Different types of news resonate by socio-economic group, with local and regional news being more important to lower socio-economic groups, and political, business, and finance news being more important to higher socio-economic groups. Branded news sites are used more by higher socio-economic groups, and reading news online is more prevalent in these groups as well.

These findings are an important reminder that news consumption and habits remain sharply divided for various groups within society. While some of these differences may well become less stark in future years, others may endure – particularly around interest in news, and the continued preference for older users to navigate via news brand.

Partiality and Polarisation of News

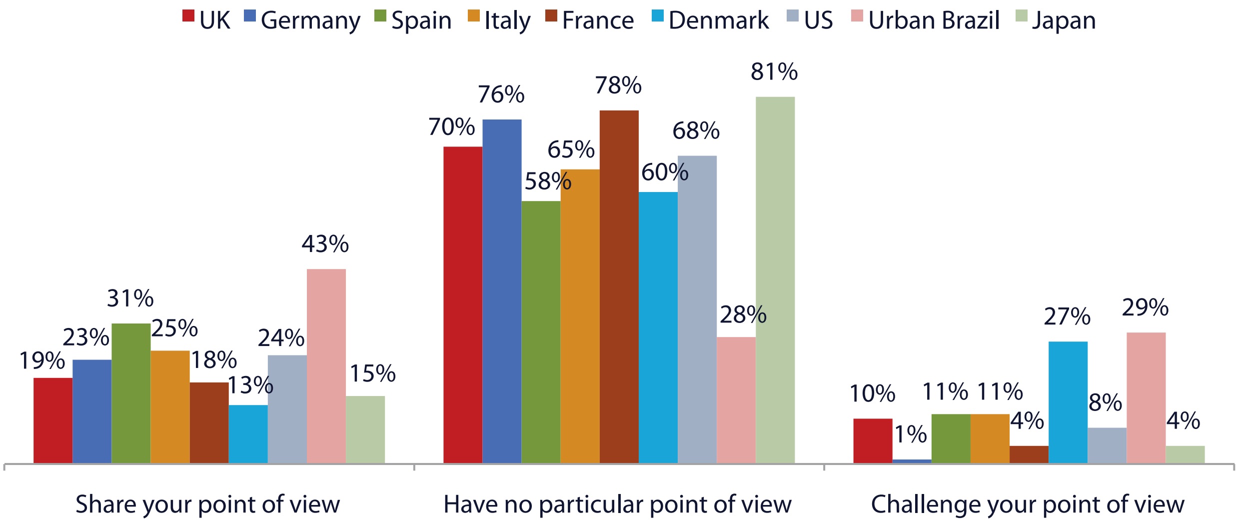


Professor Paolo Mancini, Department of Institutions and Society, University of Perugia

I am very happy to comment on the data emerging from the *Reuters Institute Digital News Report*. These data confirm, at least partially, what we wrote in *Comparing Media Systems* (Hallin and Mancini, 2004). In particular they confirm the accuracy of the definition of one of the models we outlined there, 'the polarised pluralist model', and its main constitutive elements.

But first, let's look at the data: in general, across all the countries the majority of respondents say they prefer news with 'no particular point of view'. Such differences as there are between the countries are relatively minor, other than for the urban Brazilian respondents who appear to be outliers in this ranking. Indeed, their behaviour differs significantly from all the others: Brazilian consumers seem to be far less interested in getting detached news.

Figure 4.28: Consumer preferences around news by country



Q5c: Thinking about the different kinds of news available to you, do you prefer news that…
Base: All markets UK (n=2078) US (n=2028) Spain (n=979) Japan (n=978) Italy (n=965) Germany (n=1062) France (n=973) Denmark (n=1007) Urban Brazil (n=985)
% agree

In many respects the preference for more neutral news is obvious. Conventional wisdom favours neutral news and predicts that the 'ideal' news consumer will also prefer it: journalists are supposed to produce neutral and detached news and 'the good citizen' is supposed to seek it out. Even if this is indeed the dominant approach, the percentage of those who look for news 'that share their point of view' is remarkable. In total, in all countries where the survey has been conducted, 23% of the respondents stated a preference for 'news that share their own point of view', in face of 65.6% who look for neutral news and 11.2% who prefer news that 'challenge their point of view'. Combining together the answers of those who prefer partisan news (confirming or challenging a pre-existing point of view), a total of 34.3% is reached.

Figure 4.29: Consumer preferences around news (all countries)

Impartial news	Share your view	Challenge your view	Total partial news
65.6%	23%	11.2%	34.3%

Q5c. Thinking about the different kinds of news available to you, do you prefer news that …
Base: All markets (n=11004)

This is an important result that goes in the direction of the polarisation thesis that many scholars have already outlined. Markus Prior, in particular, has in several pieces linked the development of partisan media to the increasing polarisation of American political arena (Prior, 2007). This trend is in particular linked to the rise of commercialisation and more recently to the advent of the web that together have progressively encouraged the shift from the mass audience to a series of 'niche audiences': Jomini Stroud has discussed this transformation at length in her recent book (Jomini Stroud, 2011). Her point is very simple and confirms many earlier observations: because of the abundance and the increasing commercialisation that characterise the contemporary mass media system, the mass audience is replaced by 'niche' audiences.

Each media outlet addresses a specific segment of the population defined on the basis of different dimensions. Often these are ideological and political dimensions: liberal people look for liberal media, conservative people look for conservative media, etc. In this way existing opinions are just confirmed and reinforced as many people prefer to seek out familiar and recognisable ideas.

The internet seems to further strengthen the tendency towards segmentation of the public: amongst the enormous number of possible sources made available by the web, consumers are likely to tune in to sources that focus on their interests, that share their opinions, that address problems and issues they are already familiar with. In this regard Cass Sunstein has proposed the idea of the 'Daily Me': people are likely to look more and more for their own image in the news. Sunstein's words are useful in pointing out this particular behaviour, mostly when it relates to news:

> *Perhaps you have no interest at all in 'news.' Maybe you find 'news' impossibly boring. If so, you need not see it at all. Maybe you select programs and stories involving only music and weather. Or perhaps your interests are more specialized still, concentrating on opera, or Beethoven, or Bob Dylan, or modern dance, or some subset of one or more of the above (maybe you like early Dylan and hate late Dylan). (Sunstein 2007, p. 2)*

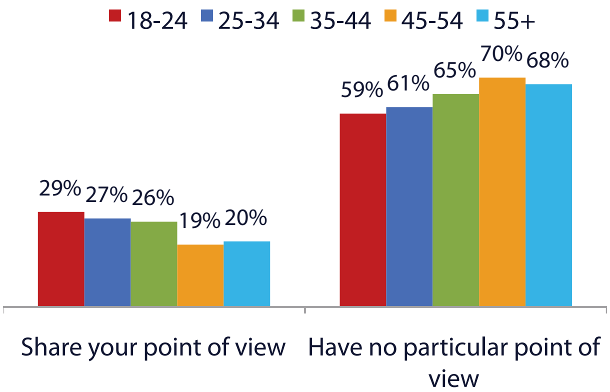
Media segmentation is mostly based on the attempt to give the consumer content and perspectives he is supposed to like and to agree with. The 'Daily Me' stresses this tendency of mass media consumers to look for their own image in what is offered by the increasing number of sources that are available today.

Polarisation may be the consequence of audience segmentation: the various 'niches' are reinforced in their pre-existing feelings and opinions. The distance between the different positions and attitudes that already exist within society is thereby increased. Rather than constructing a common sphere where different views can meet and negotiate their specific interests, new media for the most part, together with the more general impact of the very crowded mass media market driven by market logic, fosters the division of the large mass audience into smaller niche audiences, each of them mostly interested in the strengthening of its own identity. In the Reuters Institute survey, 23% of the respondents agree that they prefer to tune in to sources that share 'their own point of view'. The fact that 11.2% of the respondents state that they choose to get connected with sources that 'challenge their own point of view' confirms the acknowledgement of the existence of 'partial' web sources and therefore the possibility of choosing among very clearly distinct sources.

But I was also reassured by other results from the Reuters Institute survey which tend to confirm the hypothesis that we stressed in *Comparing Media Systems*. The countries where the level of polarisation appears highest (people are more willing to tune in to sources that share their point of view) are those we labelled as 'polarised – pluralist': namely Spain, Italy, and France. In these Mediterranean countries there are more online respondents than in the other countries surveyed who state a clear preference for news sources that share their point of view. Actually the country with highest percentage of these consumers is 'urban Brazil', which many observers consider close to the 'polarised – pluralist' model, even if with some remarkable differences compared to the European version of this model (Albuquerque, 2012). Indeed, for this author, news media in Brazil, as in many other Latin American countries (Waisbord, 2000), present a high level of political parallelism and instrumentalisation, the state also plays an important role in affecting the media, professionalism in journalism is weak, deep cleavages of a historical, social, and economic nature divide the country, so that citizens are more inclined to refer to those sources of information that they perceive close to their ideas and opinions. Ideological and political polarisation seems to be a featuring characterisation of these countries even if, in South America, the influence of commercialisation may appear stronger than in Europe also because of the more direct and closer role played by the United States.

In these countries behaviour on the web seems perfectly consistent with widespread consumption attitudes where the affiliation to a particular point of view or political perspective takes precedence over membership of any wider non-partisan community. These countries present internal divisions of economic and cultural nature that also derive from historical habits and that are deeper and more rooted than elsewhere. These divisions produce consumption patterns that align partisan content with partisan consumers. Consumers are not particularly interested in listening to different and contrasting voices, rather they seem to be more inclined to separate themselves from alternative positions and perspectives. In the end this particular choice of consumption may widen the distance among different parts of the society, thereby reinforcing social and political polarisation.

Figure 4.30: Consumer preferences by age (all countries)



Q5c: Thinking about the different kinds of news available to you, do you prefer…
Base: All markets (n=11004)

The *Reuters Institute Digital News Report* offers another interesting perspective on the theme of polarisation: young consumers are more likely to seek out sources that 'share their point of view': with 28.7% of those who are between 25 and 35 years saying they prefer 'sources that share their point of view', compared to just 20% of those over 55. In part, this is unsurprising: young people are usually 'more extreme' in their behaviour, more inclined and willing to be part of a specific group than older ones. The web reinforces this tendency: Facebook puts together old and new friends and blogs are mostly addressed to those who already share some specific interests. Approaches to news consumption reflect the same tendencies.

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Postscript And Further Reading

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

Other Relevant Surveys

William Dutton and Grant Blank, *Next Generation Users: The Internet in Britain in 2011* (Oxford: Oxford Internet Institute, 2011)

Ofcom, *Measuring News Consumption and Attitudes* (July 2012)

— *The Communications Market* (July 2012)

Pew Research Center's Project for Excellence in Journalism, *The State of the News Media* (Mar. 2013): http://stateofthemedia.org

World Internet Report Fourth Edition (December 2012) http://www.worldinternetproject.net

Other Relevant Publications from the Reuters Institute

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

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

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